



Position paper – EU protein

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Main challenges in the production of European protein plant *(source EU protein report 22.11.2018)*

- Some difficulties to the development of the EU plant protein sector have already been identified;
 - the agronomic conditions in Europe, not optimal for large-scale production of plant proteins;
 - the economic profitability of these crops in Europe;
 - the competitiveness of EU protein crops compared to imported plant proteins;
 - competition over the use of arable land;
 - a lack of research on breeding, agronomic practices and different uses.
- Revision of Common Agricultural Policy (CAP), EU Green Deal, the Farm-to-Fork strategy, European Protein plan as well as several national initiative acknowledge those difficulties and aim to support European agriculture to address those challenges.

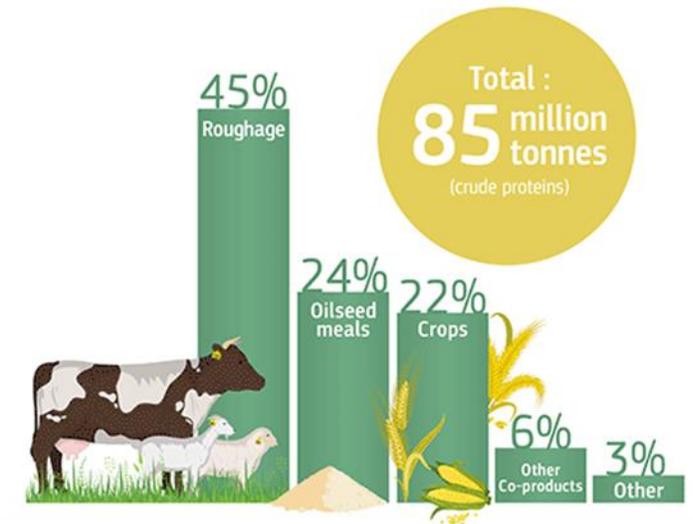


European breeders position paper to propose expertise and contribution in order to increase the quality and quantity of local plant protein supply in Europe

Market information - background

- As source of amino acids for livestock, plant proteins are a vital component of **animal feed**, and are thus essential to EU farming. They are also increasingly consumed as **human food** with an annual growth rate of almost 7% globally. However, the EU has a **major deficit in plant proteins**, importing most of what the EU agricultural sector needs.
- European production of high-protein competes primarily with the world production which is based on an **enabled regulatory and socially accepted environment** which facilitates their **lower production costs and higher yields**.
- The protein feed uses has been quite stable between 2011 and 2019 fluctuating between 83,000 and 87,000 but declining in the last 2 years to ~75,000 tons. This contributes to 78% **of local protein demand** (vs only ~65% in prior years).
- Some reasons for current protein deficit in the EU including;
 - 1962 "Dillon Round" Agreement → EU accepted access to its markets for soya without customs tariffs in return for international recognition of the Common Agricultural Policy, in particular for cereals.
 - Late development and adaptation of oilseeds and protein plants in Europe (1973 Protein Plan) which led to slower genetic advancements than for other crops.
 - Increased livestock production and growing world population.

EU plant protein supply: share of protein sources



Source: European Commission

Importance of a strong long-term European strategy to success

- Past experience have proved that policies can strongly influence the local dynamic of crops and grain flow
- Biodiesel example show the way of success with a clear and meaningful incentive on local biodiesel production. The benefit was towards the full value chain and all the countries involved in OSR production. Breeders enabled this success by actively breeding for local adaptation and improved oil content
- But when the impulse is not broad enough at European level or incentive not sufficient, the initiatives could also lead to collective failure like the example of soybean in early 2000's in France.

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European Commission has to continue playing a key role in defining cornerstones for the EU Protein Plan, including suitable instruments, meaningful and long-term incentives and targets for a defined date in the future (e.g. 2030). It requires an overall strategy and action plan along which the Member States should act

Breeding is a long process requiring to have visibility on the regulatory frame and on the value chain evolution

Enable innovation for a competitive EU production

- Competitiveness of EU agriculture is linked to its capacity of innovation and access to the most advanced technics. This means EU breeders should be able to use the most advanced breeding technics to fasten and strengthen the local protein research programs
- **Breeders' need financial support** for investments towards new crops or to breed more intensively on protein, not neglecting other criteria critical for a sustainable production. The local adaptation of crop and varieties requires local strong investment that need incentives. It already exists in other geographies in competition with Europe – eg canola Canada
- Additional need for;
 - An EU harmonized registration system promoting protein content and quality for relevant crops
 - A robust Plant Variety Rights, including Farm Saved seeds enforcement
 - Competitive and profitable production for growers, enabled by access to best-in-class inputs
 - **Enable local innovation** and modern breeding technics, including New Genomic Technics

Value chain competitiveness

- There is no unique solution to protein deficit so solution will come by both increasing protein content in existing crops and increasing production of emerging and new protein crops.
- A value chain becomes sustainable only if it is competitive all over its actors.
- **Significant investments will be required** by the upstream part of the value chain. This also applies to cultivation, where investment is also needed in technology and know-how. These investments should **be supported by governments through appropriate measures.**
- The Common Agricultural Policy and its reorientation, also considering the Green Deal and its related strategies (F2F, Biodiversity), provide good opportunities to strengthen domestic protein crop production. The options to cultivate protein crops should be used within the framework of environmental measures and on set-aside land

Support educational communication to consumers

- Breeders are already strongly engaged in contributing to consumers' demand for more local, traceable sustainable and secure protein production, also addressing farmers' needs for higher and more stable yields, increased pest resistance, and new qualities.
- EU bodies to support the education and reconnection of consumers with local agriculture
 - Benefits of plant protein crops for protein-based food. Growing demand in Europe
 - Highlight local efforts for the reduction of agricultural impact on climate and environment, providing traceable and safe food and feed
 - Explain why it is important to lower EU protein dependence
 - Educate on the diverse source of proteins for different uses (tradition protein crops, legumes, rapeseeds, forage...) and their benefits

Summary

- The decrease of EU dependency on protein can only be achieved by a **long term, clear strategy at European level, along which EU countries will act**. There is no unique solution to it so it will be driven by both increasing protein content in existing crops and increasing production of emerging and new protein crops.
- Breeders are already strongly engaged in contributing to consumers' demand for more local, traceable sustainable and secure protein production, also addressing farmers' needs for higher and more stable yields, increased pest resistance, and new qualities. Proposing improved seeds on all those criteria requires significant investments on long term, but also ability to develop or access innovations to fasten and optimize the breeding work. Breeders need support for this extra-effort on selection:
 - **Financial support** to support investments towards new crops or to breed more intensively on protein, not neglecting other criteria critical for a sustainable production
 - A **clear legal framework** to operate in Europe in term of registration and to secure a return on investment for the varieties created. The speed and optimization of the innovation will be also strongly influenced by **access to best-in-class technologies** including the most modern breeding technics
- Finally, no significant and sustainable change in the protein supply can be achieved without ensuring **sustainability and competitiveness of the entire European value chain** – farmers, breeders, grain collectors, food and feed producers...It means also that consumers must embrace this change, which will request to reconnect our consumers with the positive evolution of EU agriculture, its traceability, safety and reliability.



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