

# THE EU AGRICULTURAL OUTLOOK FOR MEAT AND DAIRY

Session 8



THE 2019  
**EU AGRICULTURAL  
OUTLOOK CONFERENCE**

**Sustainability**  
from Farm  
to Fork







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# What if EU Consumers would change their diet towards more plant proteins?

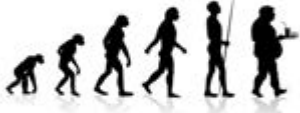
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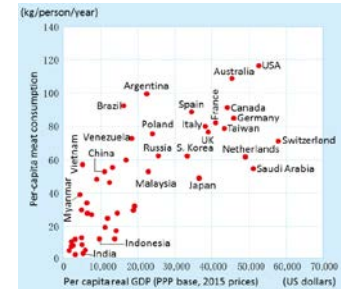
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# MOTIVATION



- The **diet of the early humans** included large quantities of fruit, leaves, flowers, bark, insects and meat ("Paleo Diet")
- The transition towards a '**Western Diet**' has implied a less diverse food basket and higher intake of livestock and processed products (*wealth effect*)
- Health, environment, animal welfare and food security concerns are potential determinants for a **dietary change** towards a more balanced intake of plant and animal proteins







# A 'PROTEIN SHIFT' SCENARIO

Gradual reduction of the animal/plant protein intake ratio in the EU to reach **50% in 2030** (58% in the EU Outlook)

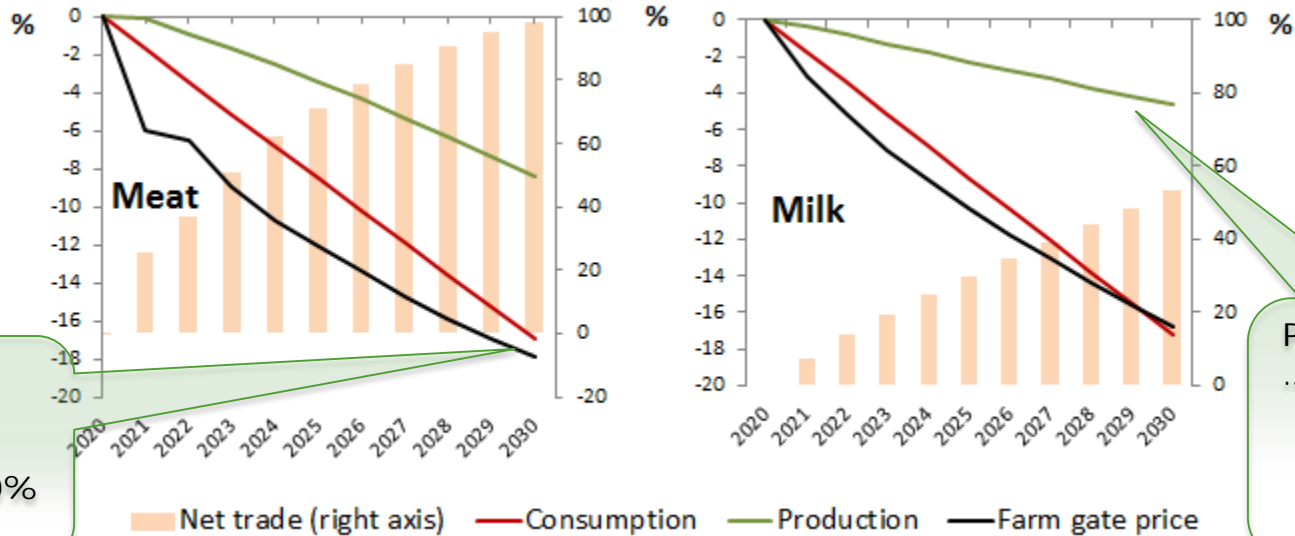
## Change in EU Diet in 2030 (grams of product weight per week per capita and %)

Meats	-192	(-17%)	Cereals	+44	(+2%)
Dairy products	-348	(-17%)	Pulses & Soya	+106	(+133%)
Fish & Eggs	-103	(-17%)	Vegetables and Nuts	+319	(+3%)
TOTAL	-643			+469	



# IMPACTS: MEAT AND DAIRY MARKETS

(% DIFF. COMPARED TO THE BASELINE 2020-2030)



Price impacts differ per meat type (in 2030):

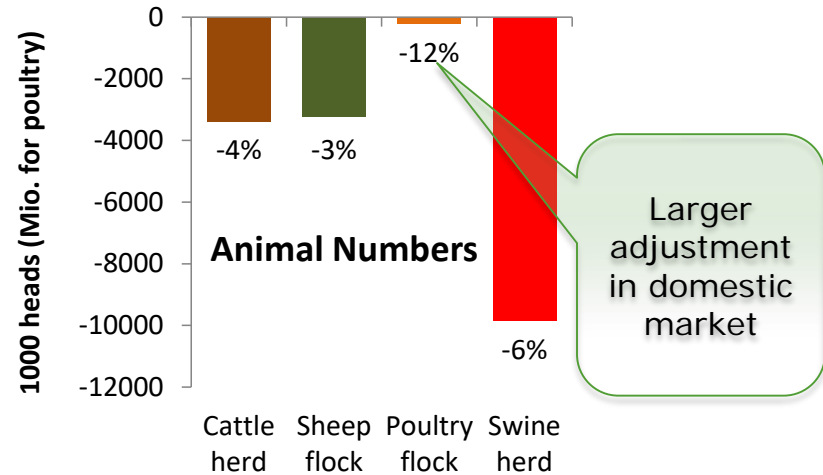
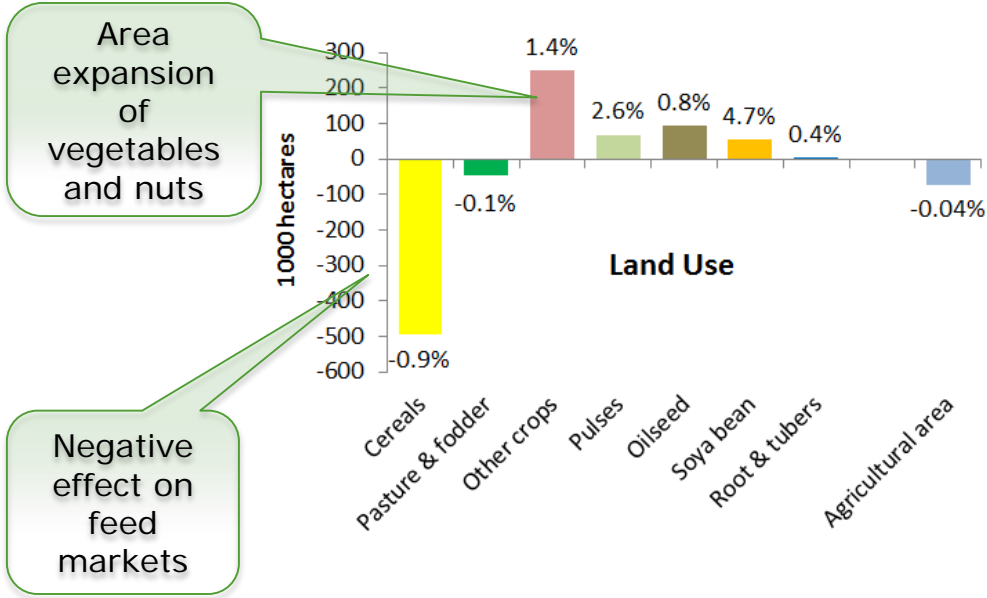
- beef/pork -20%
- poultry -7%

Production falls ... but less than consumption due to the expansion of trade



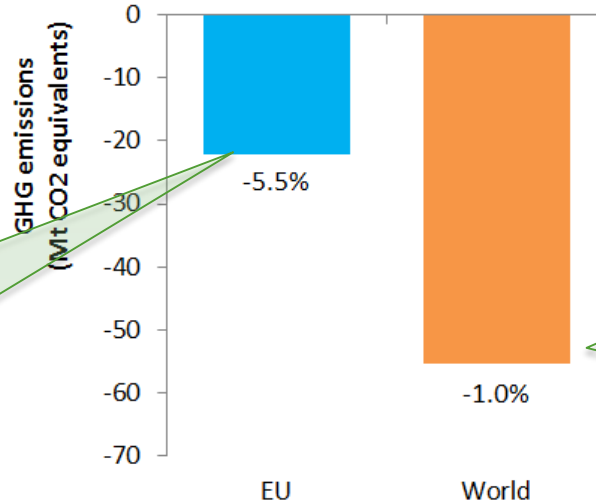
# IMPACTS: LAND USE AND LIVESTOCK

(% DIFF. COMPARED TO THE BASELINE IN 2030)



# IMPACTS: GREENHOUSE GAS EMISSIONS

(% DIFF. COMPARED TO THE BASELINE IN 2030)



EU agricultural GHG emissions are reduced by 22 Mt CO<sub>2</sub>eq

Non EU countries reduce their emission by further 33 Mt CO<sub>2</sub>eq ...

... since the EU livestock sector:

- ✓ gains global market share, and
- ✓ is comparatively more efficient in terms of emissions





# TAKE-HOME MESSAGES



- A shift in diets towards plant protein will pose important challenges to the EU livestock sectors
- A partial replacement of animal protein in the EU can be achieved by higher consumption of cereals, pulses, vegetables, nuts and soybeans
- The impact on production and prices is moderated by the ability of the EU to increase exports (would be different in the case of a 'global protein shift')
- EU and World GHG emissions are expected to be reduced







# THANK YOU !

## #AgriOutlook

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