



The development of EU Plant Proteins

State of play

Workshop 3
Supply Chains in the EU Protein Sector
11 July 2018



Agenda

1. Context
2. Preliminary results
3. Progress on work plan



Context: a lot of interest

- *Various requests from **stakeholders** on "plant proteins" (e.g. FEFAC Conference June 2017)*
- ***Council**: discussions on plant proteins at Council level mid-2017 on "**Soya Declaration**" + February 2018 about work programme for the EU protein plan – broad support from Member States for EU protein plan*
- ***European Parliament**: April 2018 adoption of initiative report (MEP Denanot) on a "**European strategy for the promotion of protein crops**"*
- ***European Commission**: preparation of Commission Report "**The Development of Plant Proteins in Europe**", end 2018*
- ***Austria** (as EU Presidency) will host **EU conference on Plant Proteins** on 22/23 November 2018*



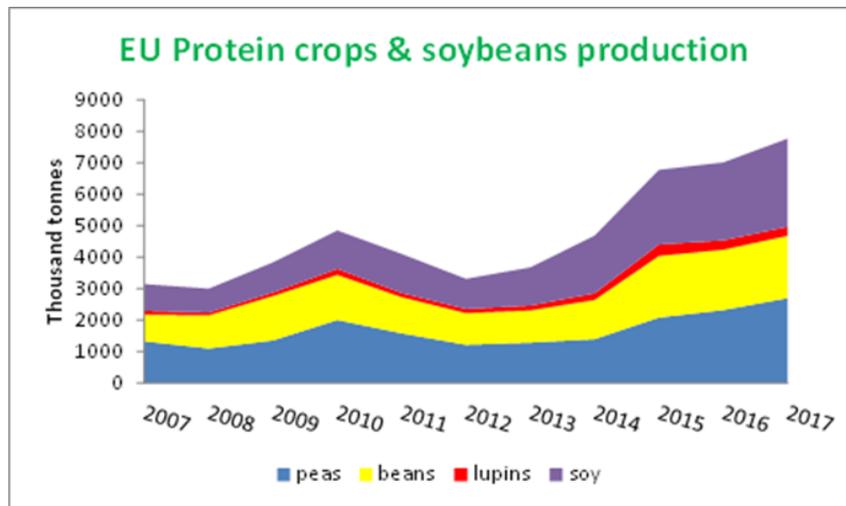
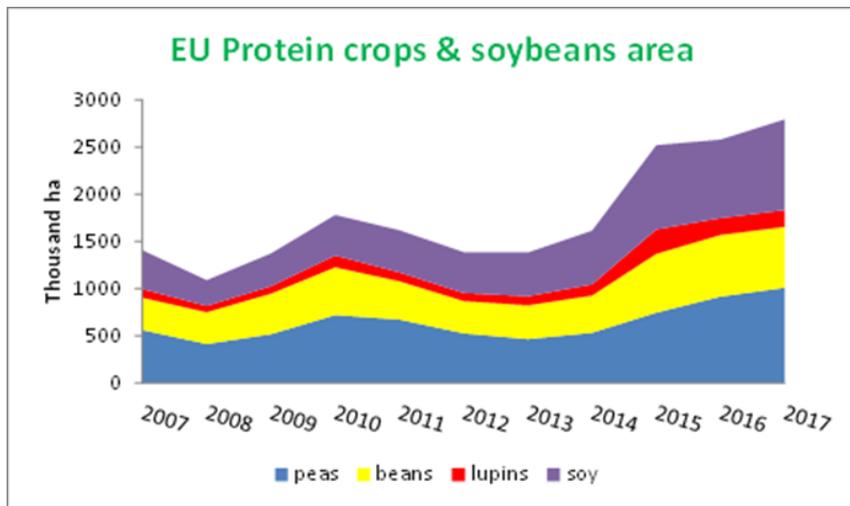
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Context: EU protein crops and EU soya Production on the rise

Area/production more than doubled since 2013

EU protein crops (peas, beans, lupins): 5 Mio tonnes

EU soya: 2.8 Mio tonnes





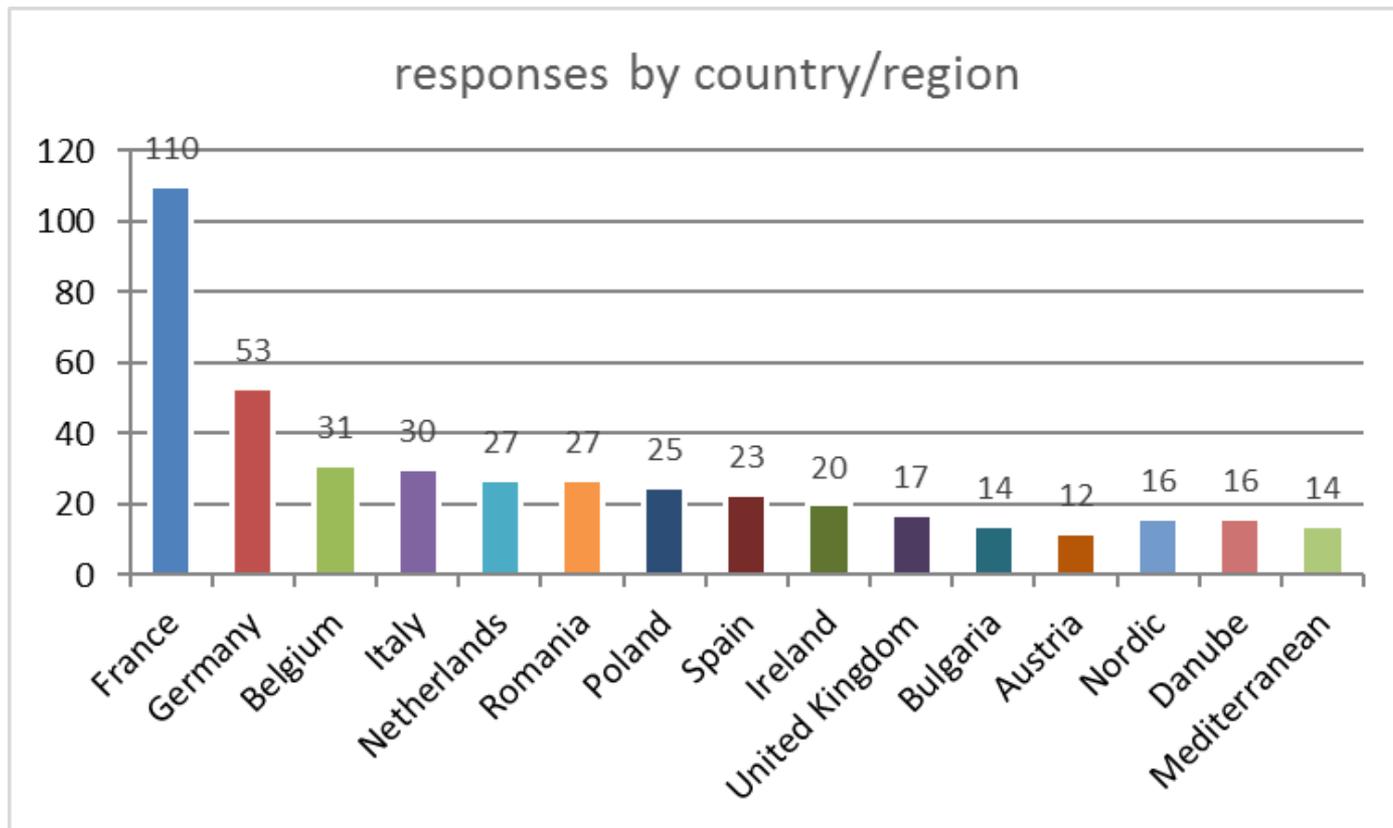
Results: Stakeholder Survey

- Launched on same day as Council meeting (19th February)
- Total of 15 questions on plant proteins addressing scope, policy, markets, research
- Communicated through e-mail notification to 300 stakeholders and announced on DG Agri website
- In total 444 responses

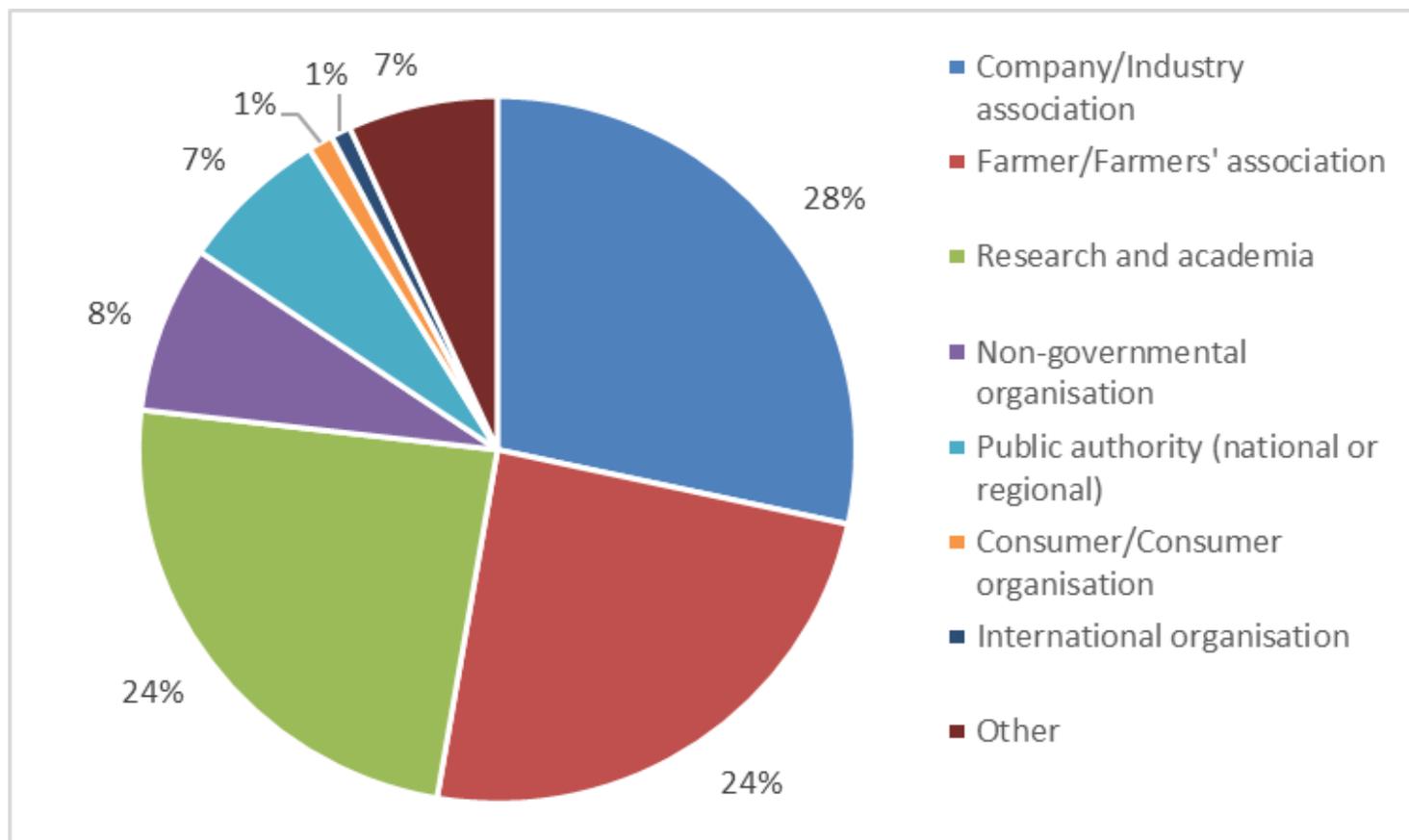
Responses by Geographical Origin

Responses from 26 MS

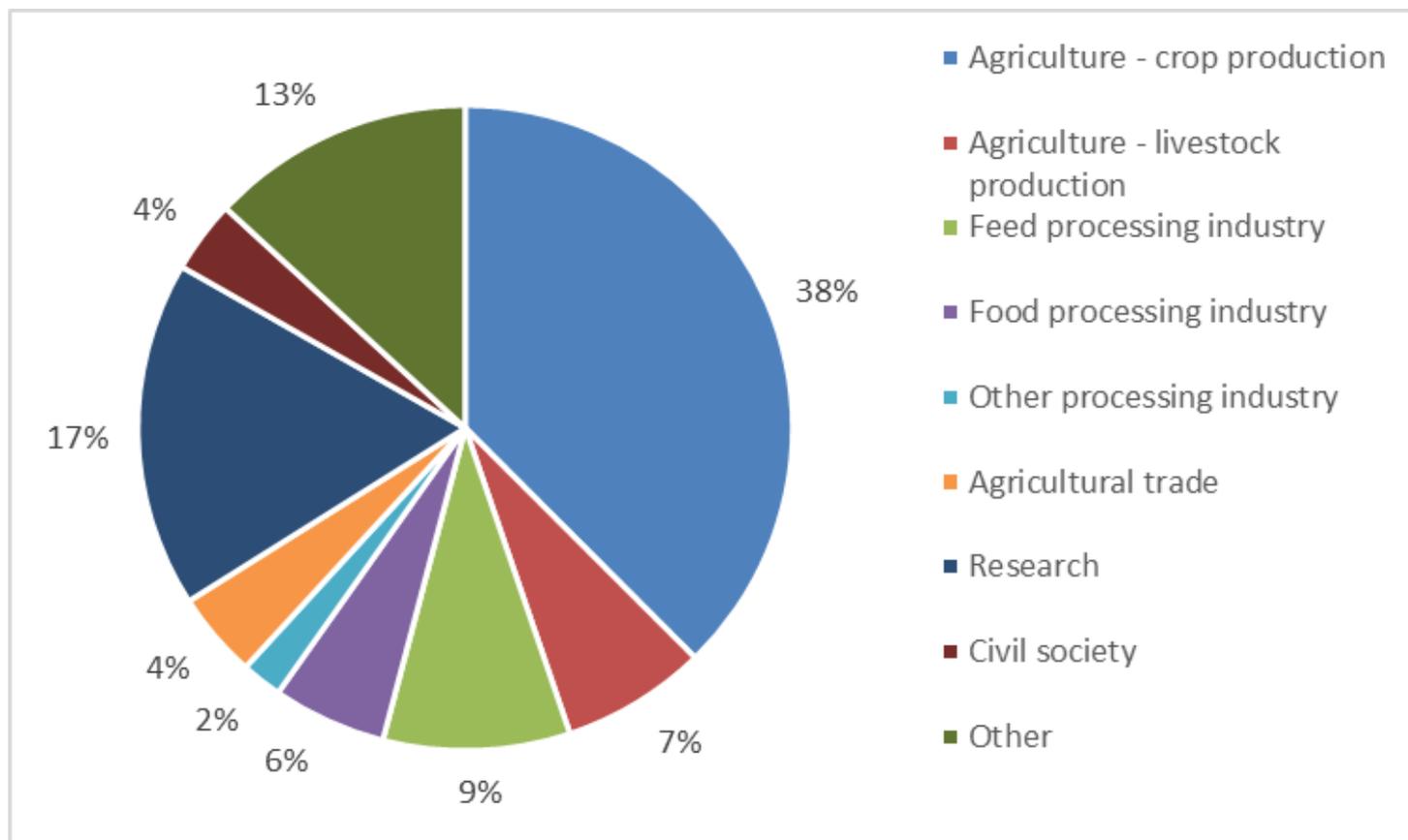
Most responses from France and Germany



Responses by type of organisation 75% by companies, farmers and research



Responses by position in the value chain broad coverage

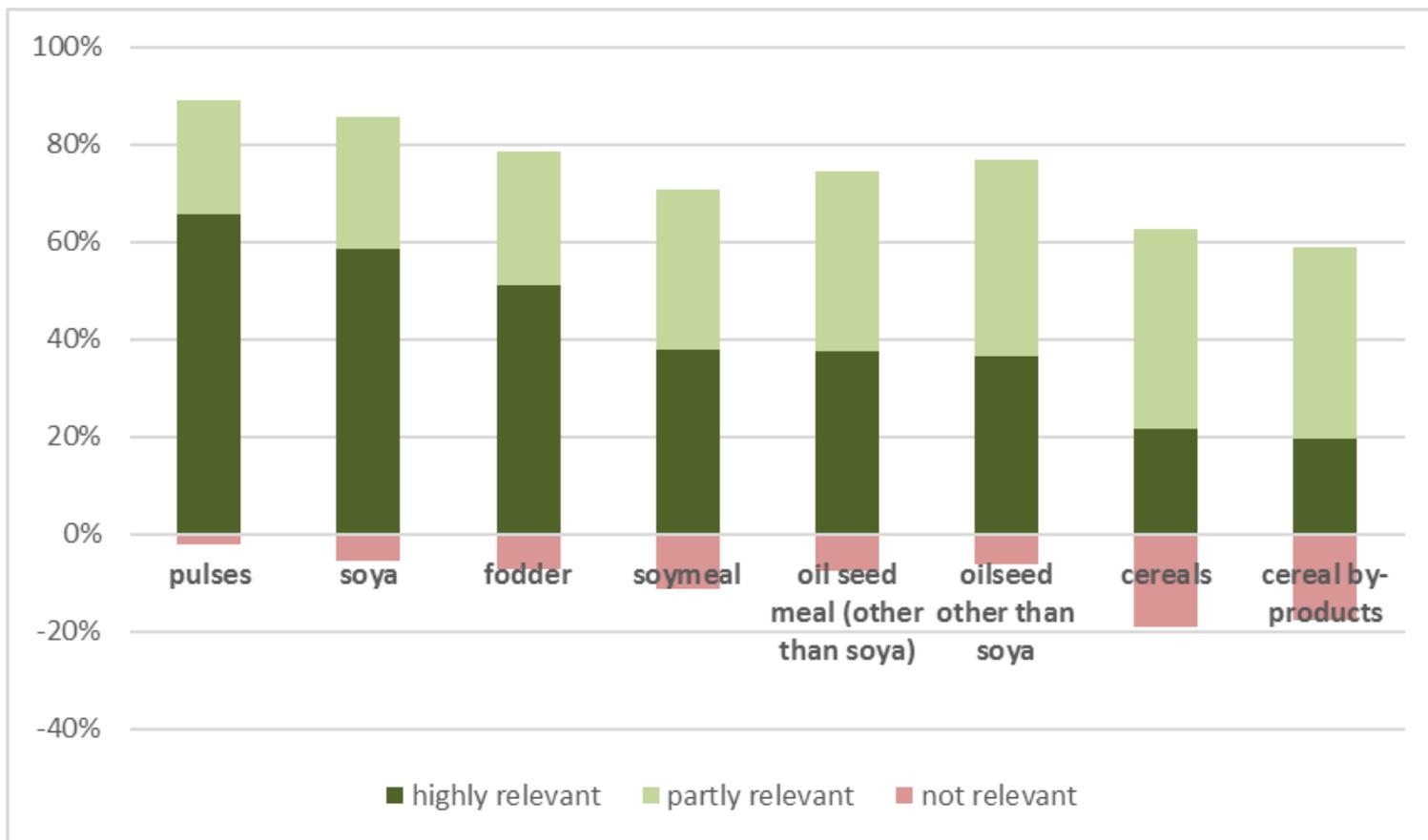




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Sources of plant proteins

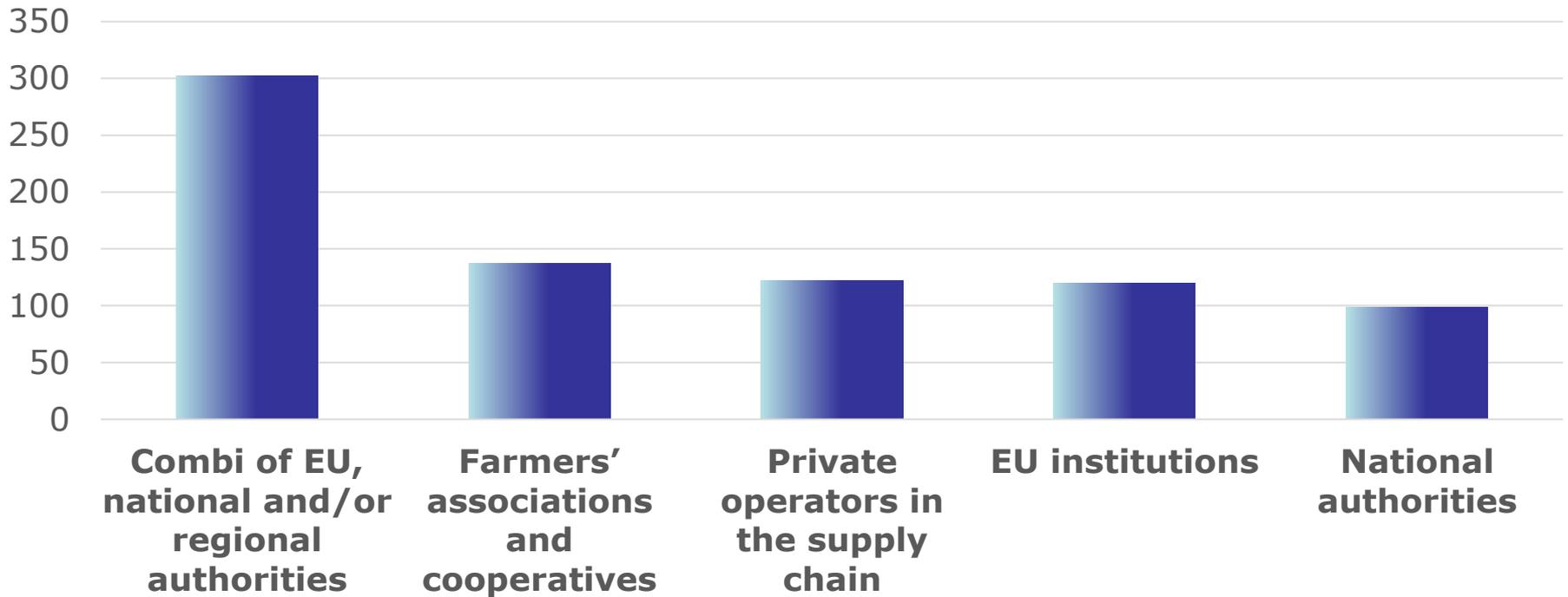
Soya, pulses and fodder most relevant





Actors for protein plan

Joint effort by authorities and sector

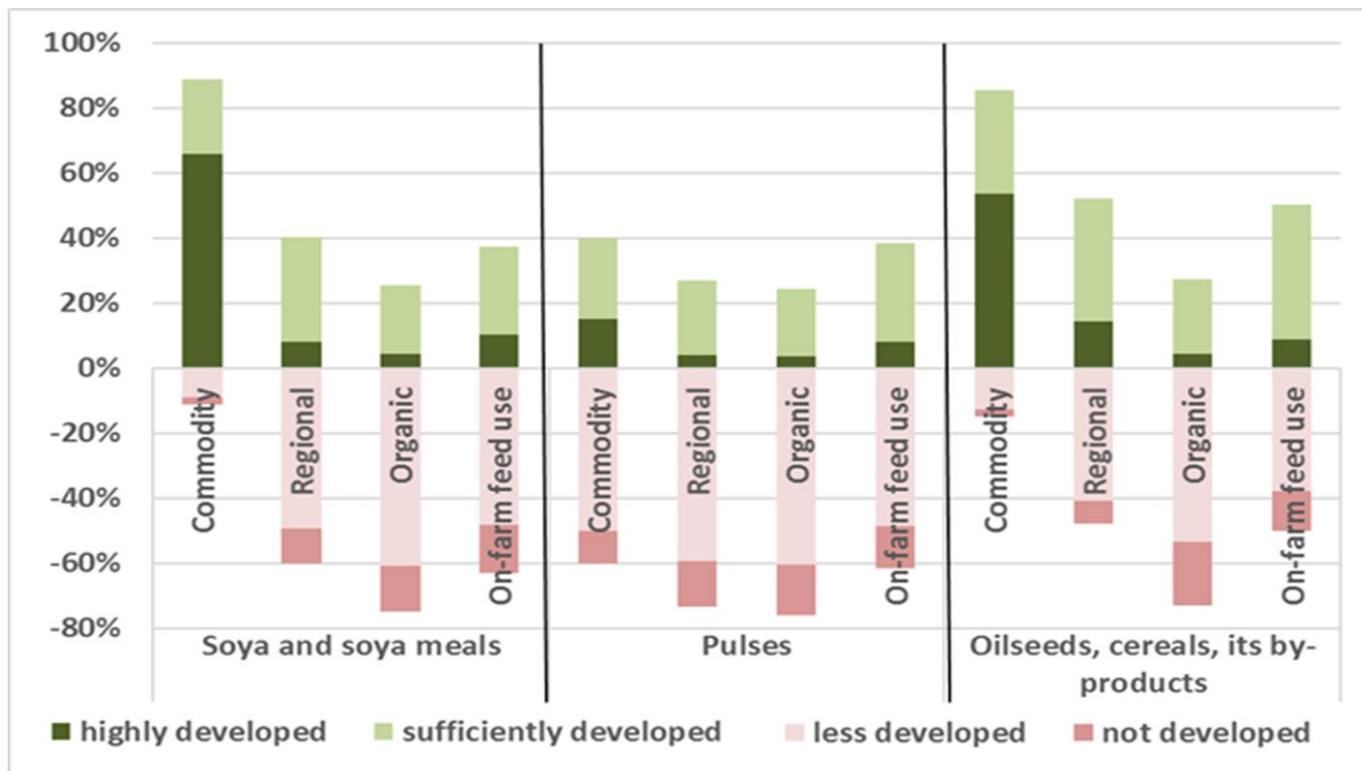




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Feed supply chains

Commodity markets soya & oilseed most developed Organic least developed

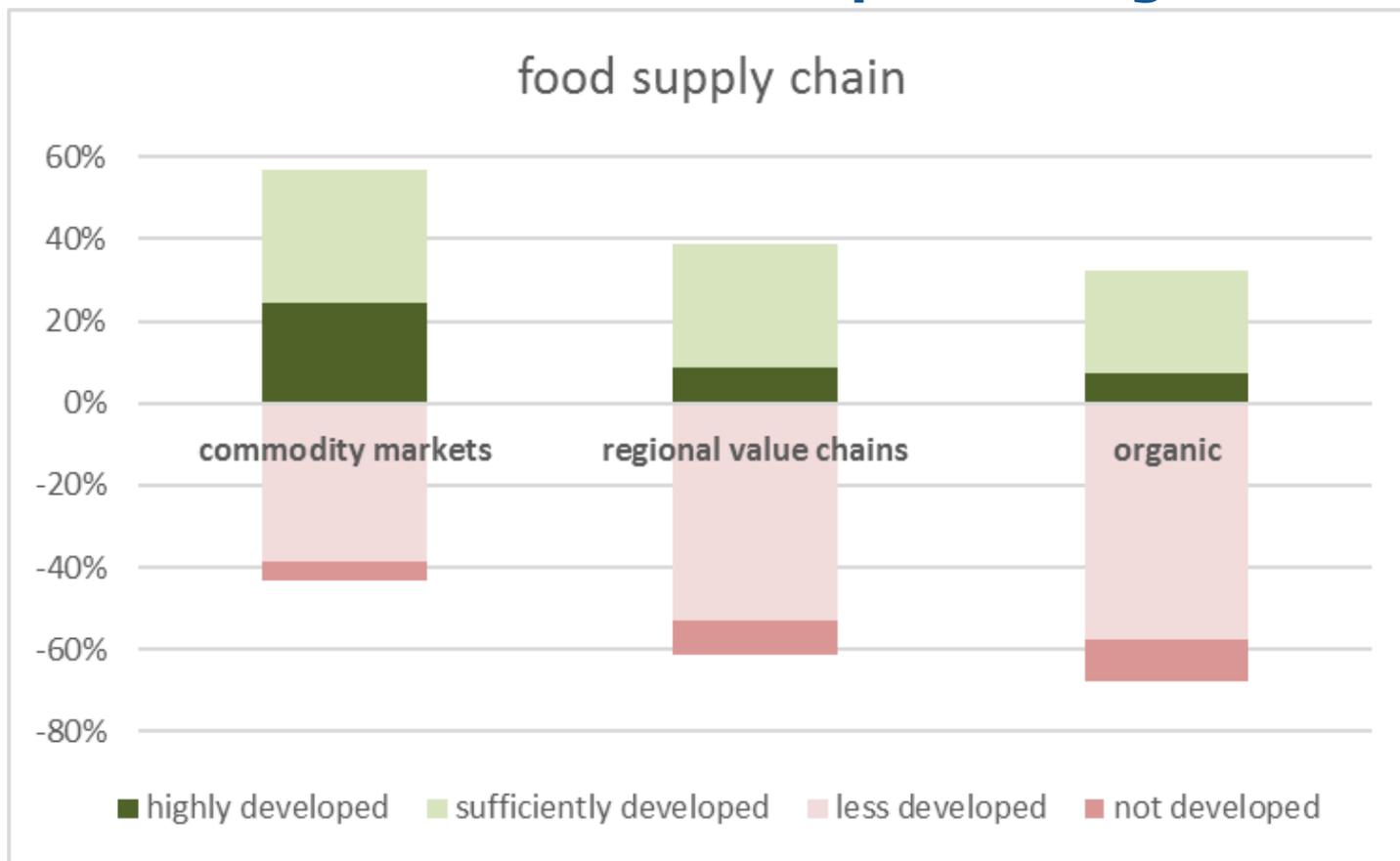




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Food supply chains

Needs further development in general





Preliminary results: Workshop 1 Research and Innovation

- *Research in better varieties is needed*
 - **More stable and higher yields**
- *Protein crops often too small for private breeding companies*
- *Farmers not sufficiently aware of the effects of legumes on the next crop*
- *Feed and food are very different markets*
 - **Feed is about amino acid and digestibility**
 - **Food is about taste**



Preliminary Results: Workshop 2

Agronomic practices & environmental benefits

- *Agronomic practices*
 - **Crop rotation**
 - **Reduced fertilizer need**
 - **Breaking pest cycles**
 - **But also extra pest pressure**
- *Environmental benefits*
 - **Soil quality**
 - **Water quality**
 - **Biodiversity**



Upcoming activities

- *Workshops*
 - 4. Market Segments**
 - 17/18 September in the Netherlands.
- *High Level Conference in Vienna 22/23 November*