



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

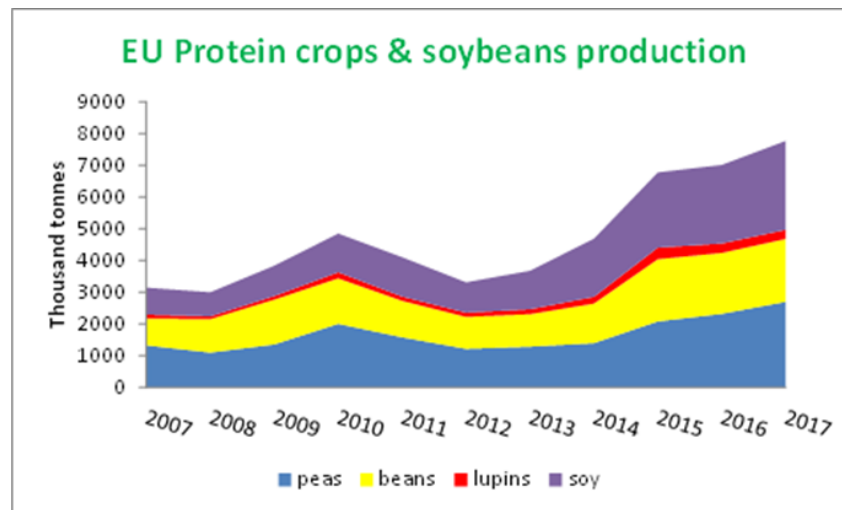
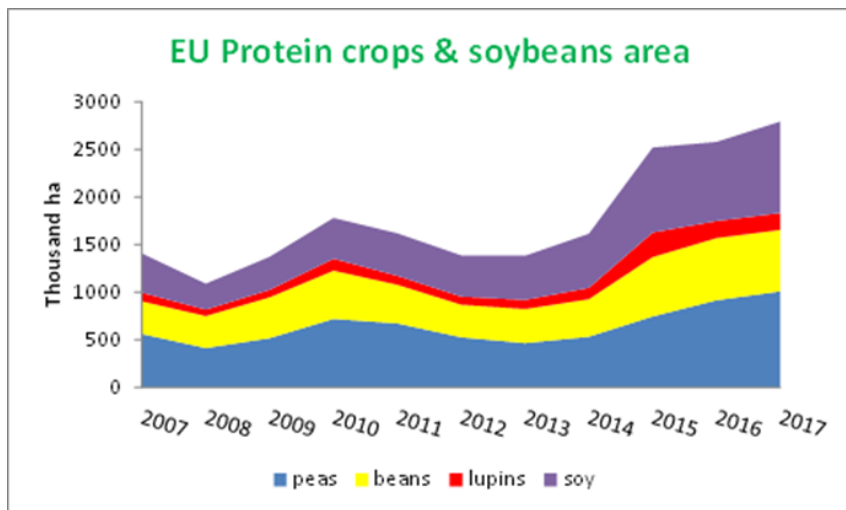
- Various requests from **stakeholders** on "plant proteins" (e.g. FEFAC Conference June 2017)
- **Council:** discussions on plant proteins at Council level mid-2017 on "**Soya Declaration**" + February 2018 about work programme for the EU protein plan – broad support from Member States for EU protein 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

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

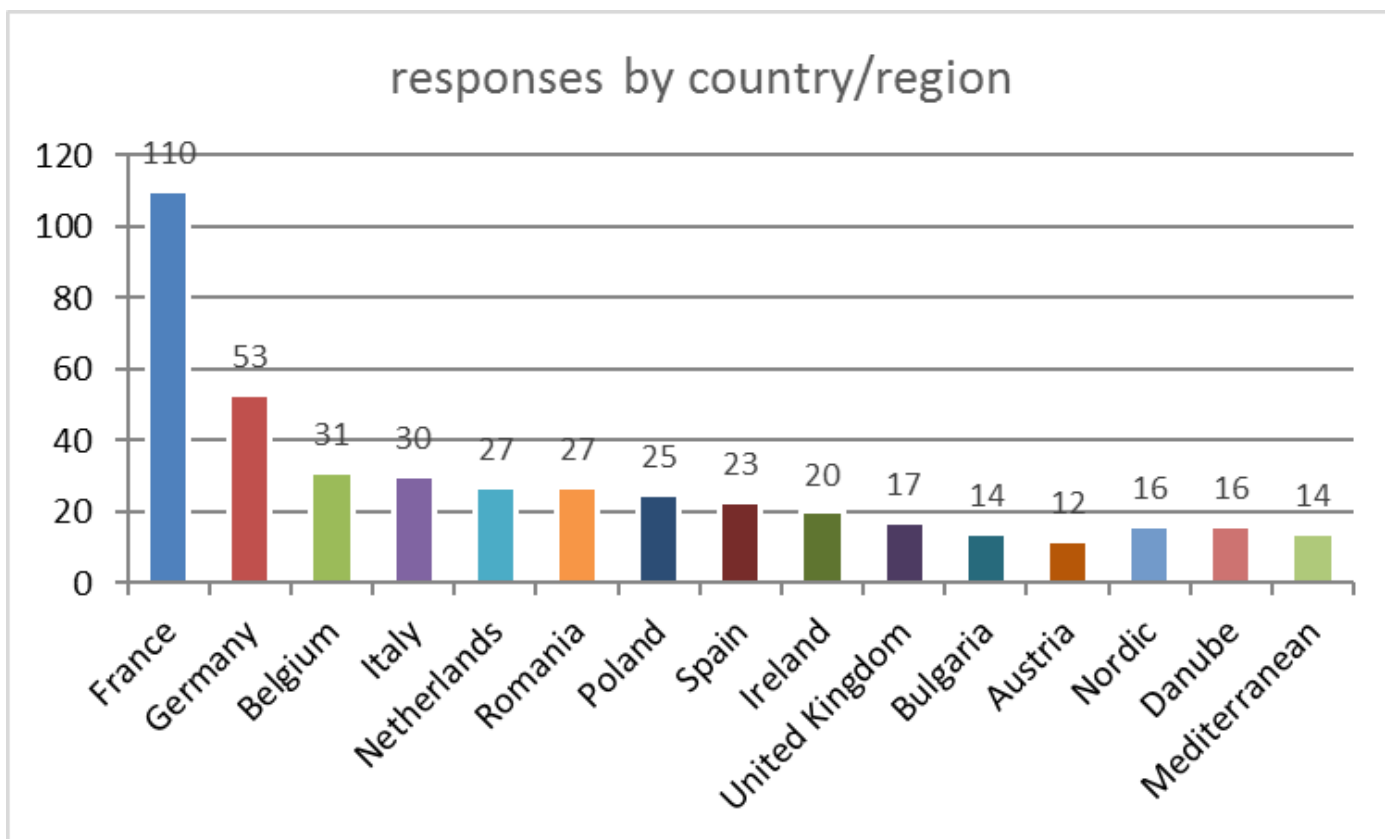


European
Commission

Responses by Geographical Origin

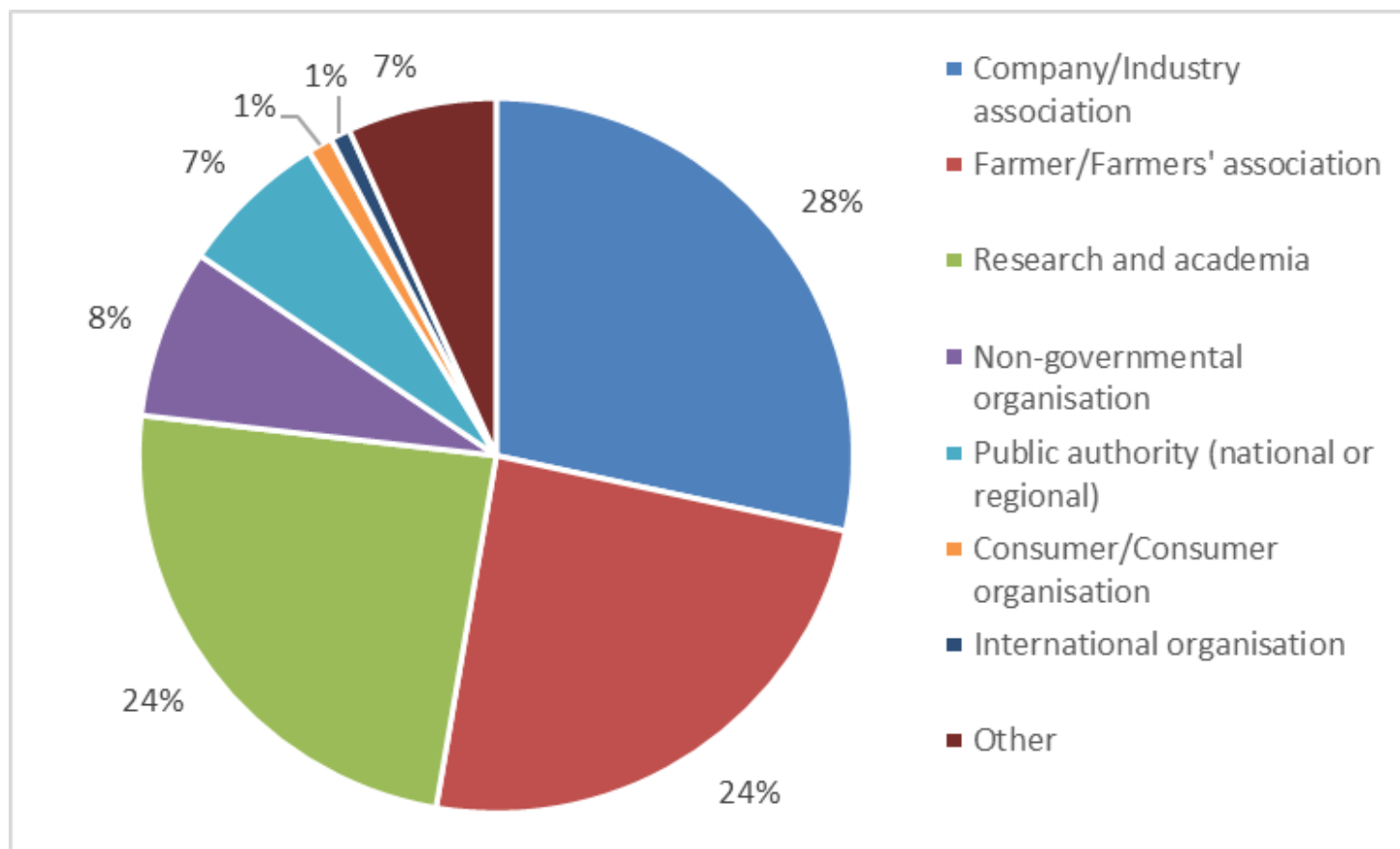
Responses from 26 MS

Most responses from France and Germany

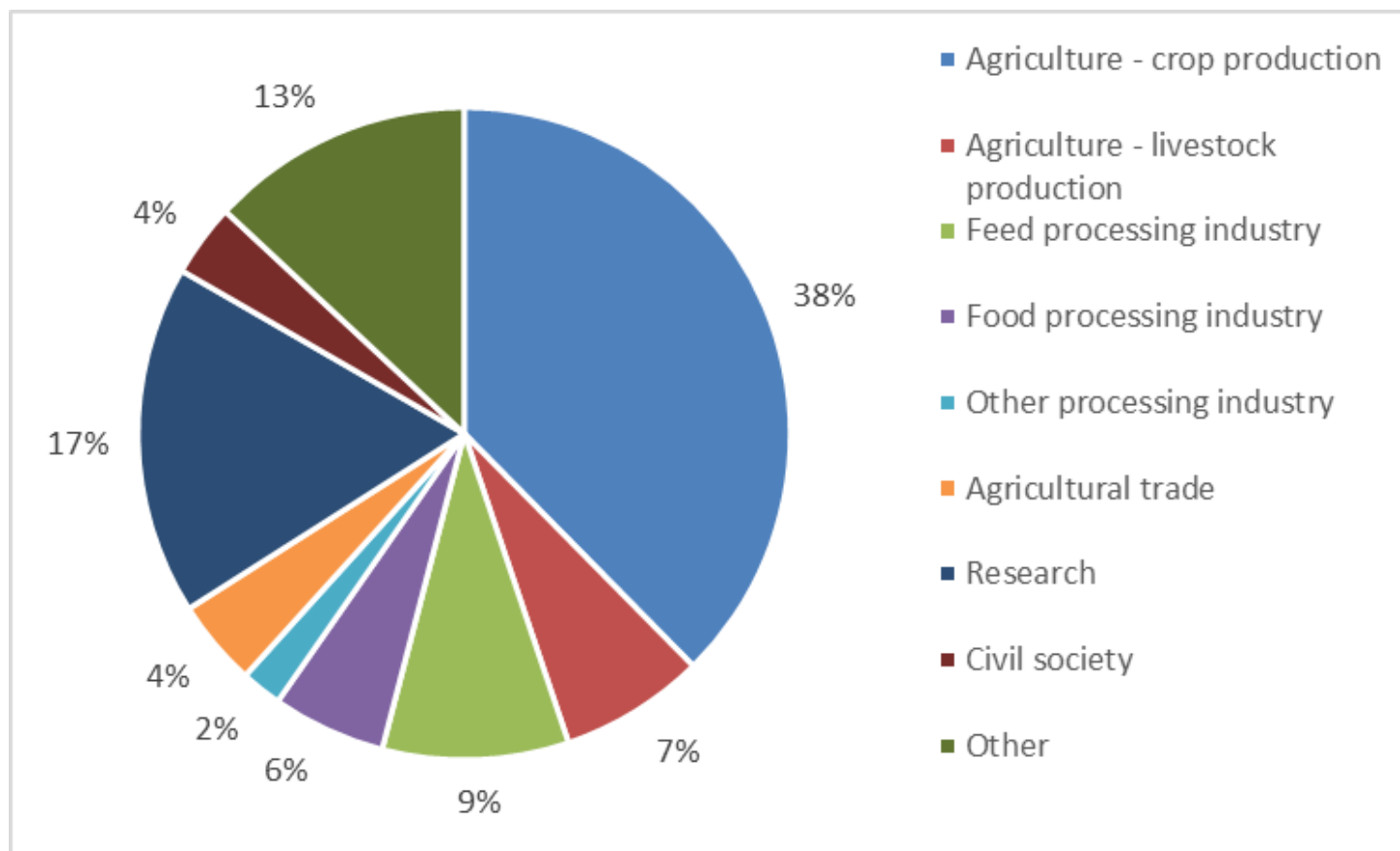


Responses by type of organisation

75% by companies, farmers and research

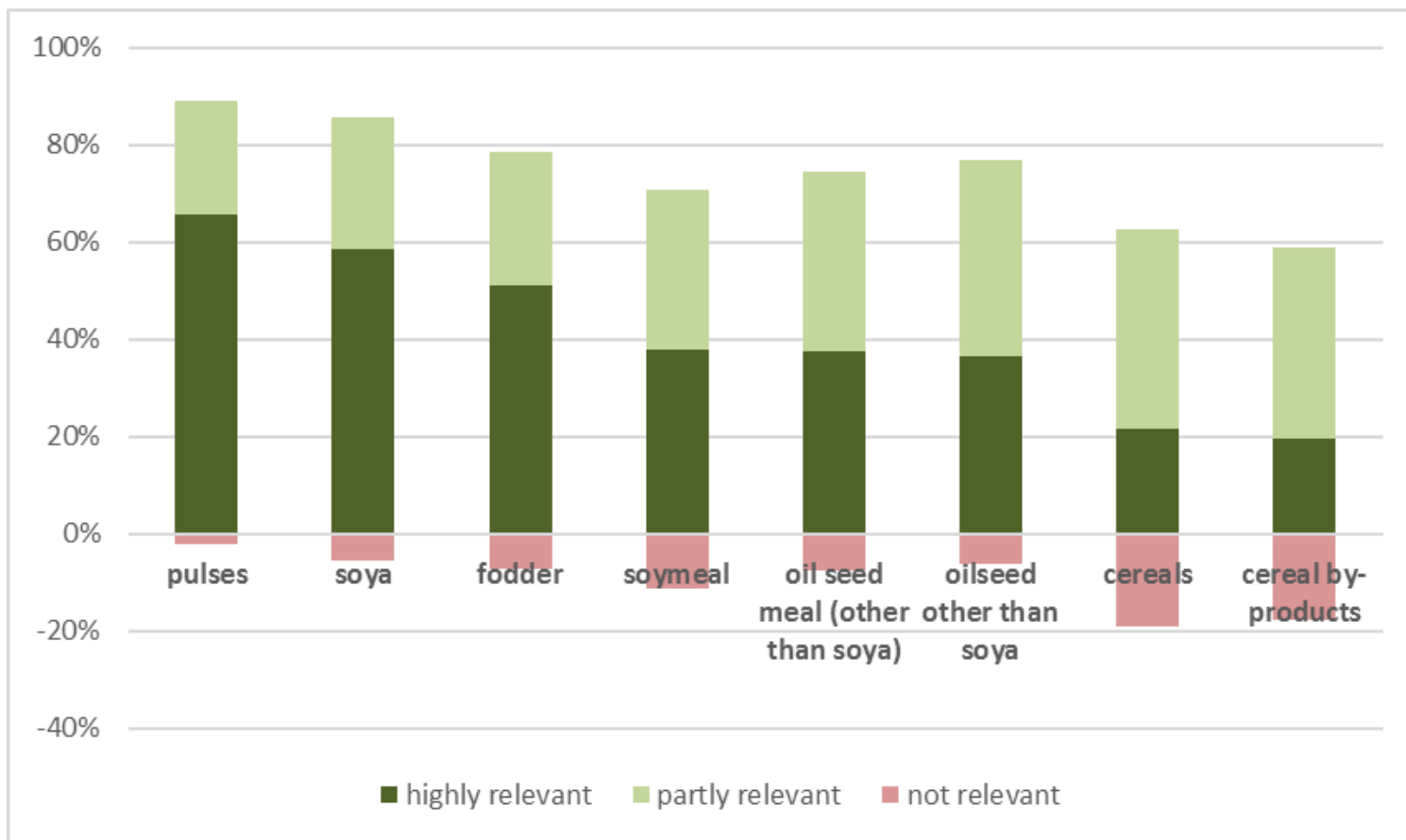


Responses by position in the value chain broad coverage



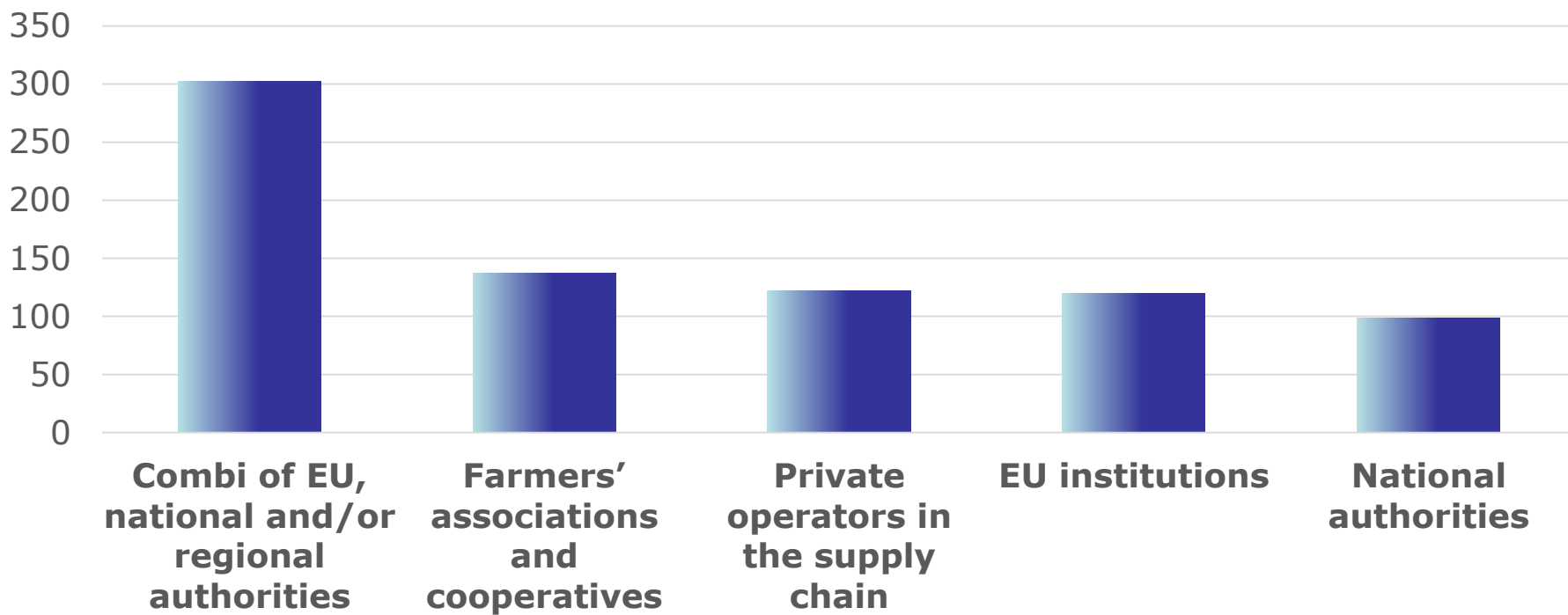
Sources of plant proteins

Soya, pulses and fodder most relevant



Actors for protein plan

Joint effort by authorities and sector

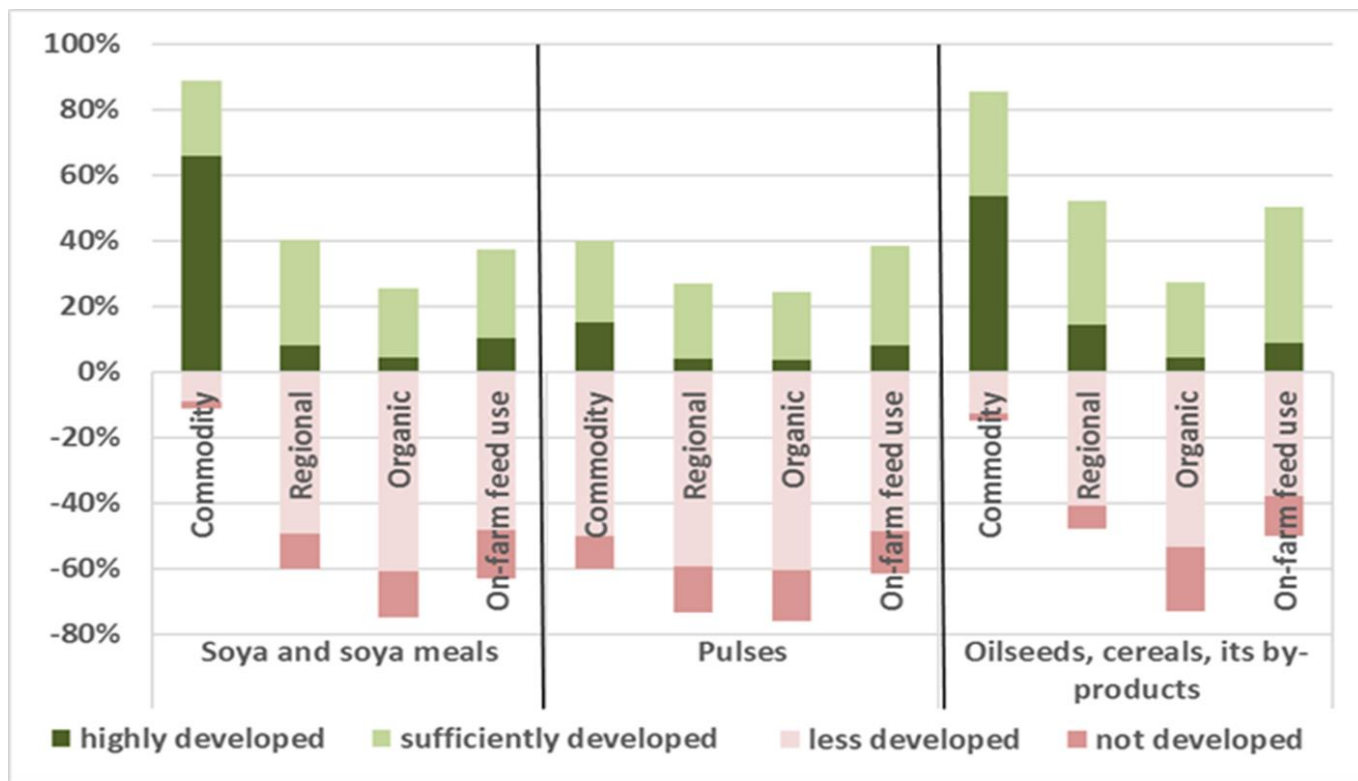




European
Commission

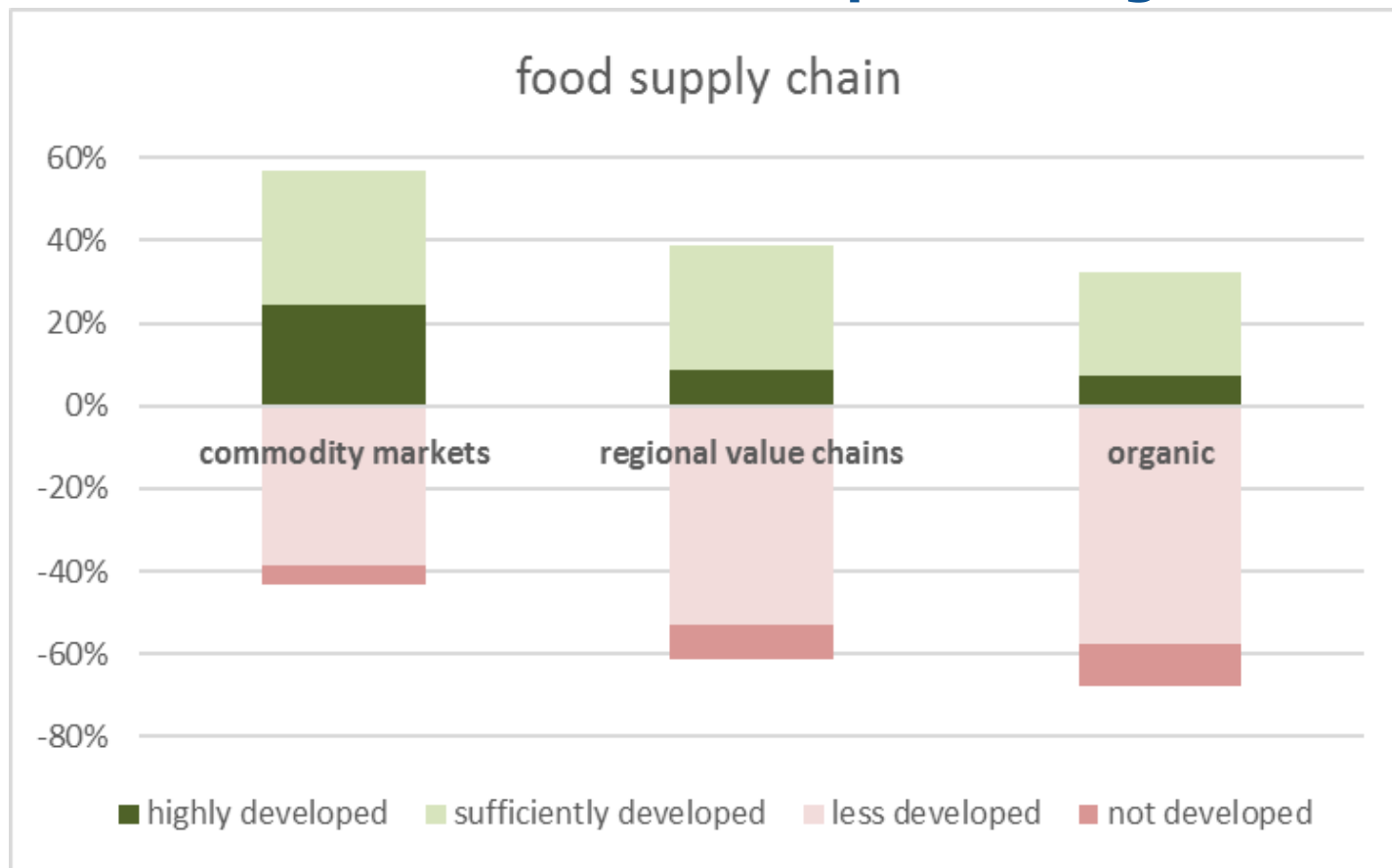
Feed supply chains

Commodity markets soya & oilseed most developed Organic least developed



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*