



The Development of Plant Proteins in the European Union

State of play

Workshop Market Segments

Lelystad

17 September 2018



Agenda

1. Context
2. Stakeholders survey - results
3. Progress on the report

Context: a lot of interest

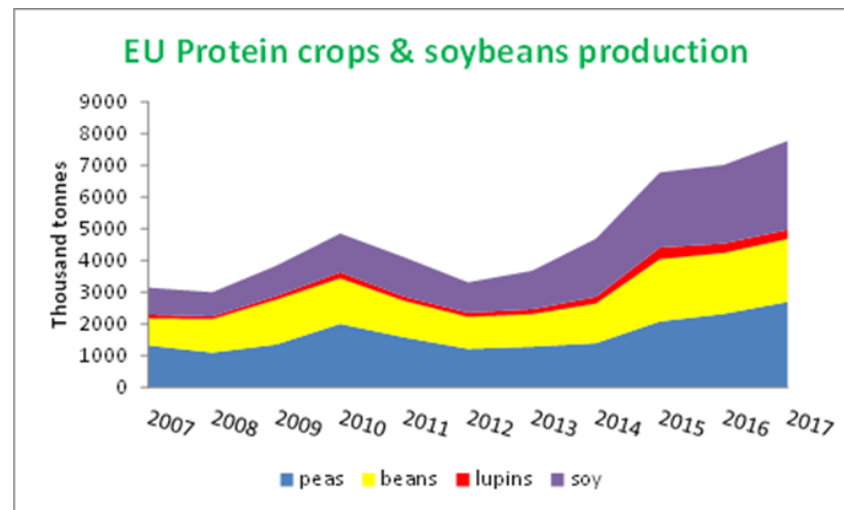
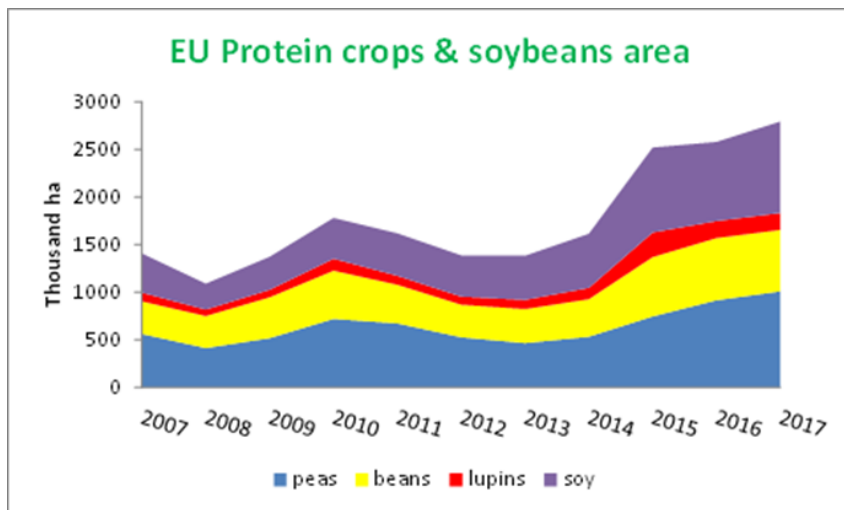
- *Various requests from **stakeholders** on "plant proteins" (e.g. FEFAC Conference June 2017)*
- ***Council:** discussions on plant proteins at the Council level mid-2017 on "**Soya Declaration**" + February 2018 about work programme for the EU protein plan – broad support from Member States for the development of EU plant proteins*
- ***European Parliament:** April 2018 adoption of 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 'The Development of Plant Proteins in Europe'** on 22/23 Nov 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

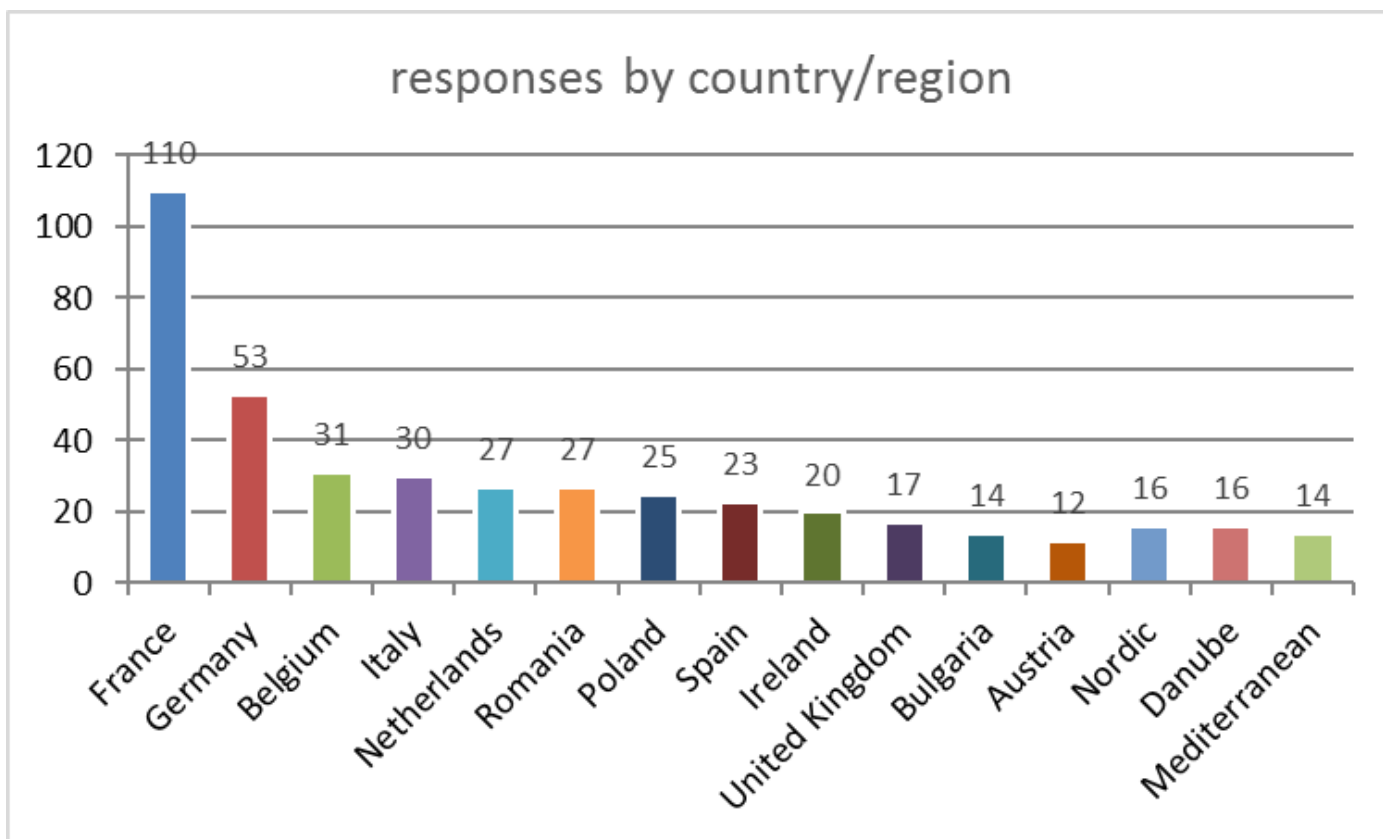




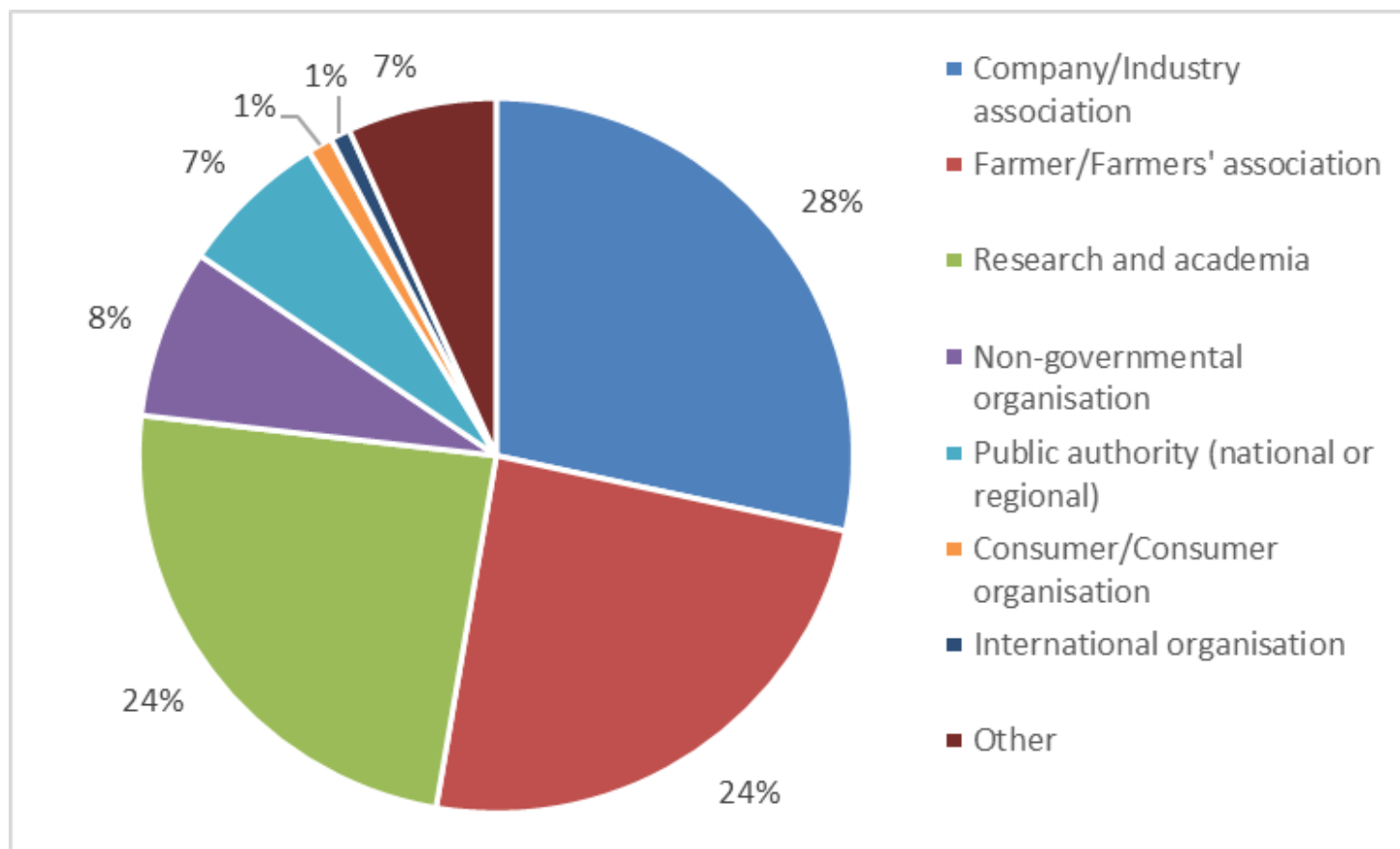
Results: Stakeholder Survey

- 444 responses, coming from 26 Member States
- Research and innovation is highest priority
 - **breeding (yield improvement & nutrition)**
 - **Sustainability**
- Crop rotation, reduced fertilizers and soil fertility are most important benefits
- Regional and organic feed supply chains need improvement
- **The development of EU protein plants should be a joint effort between different authorities, farmers and industry**

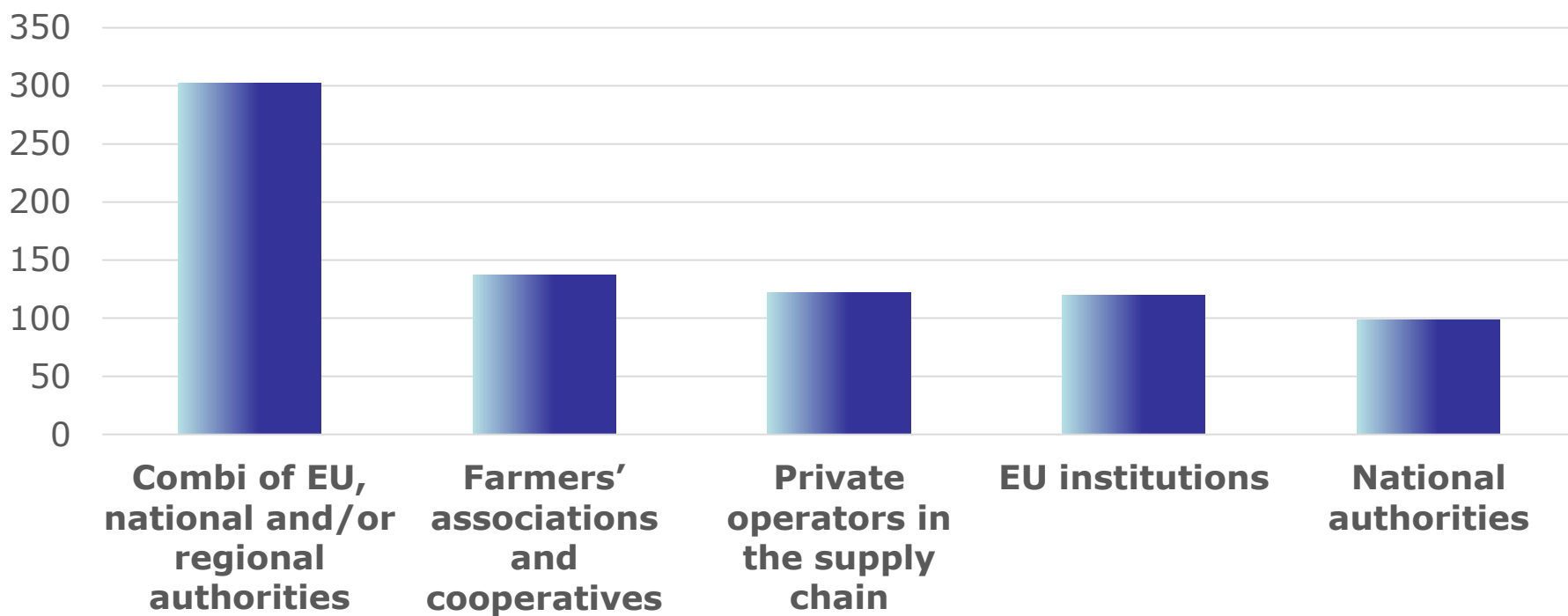
Responses by geographical origin (most responses from France and Germany)



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

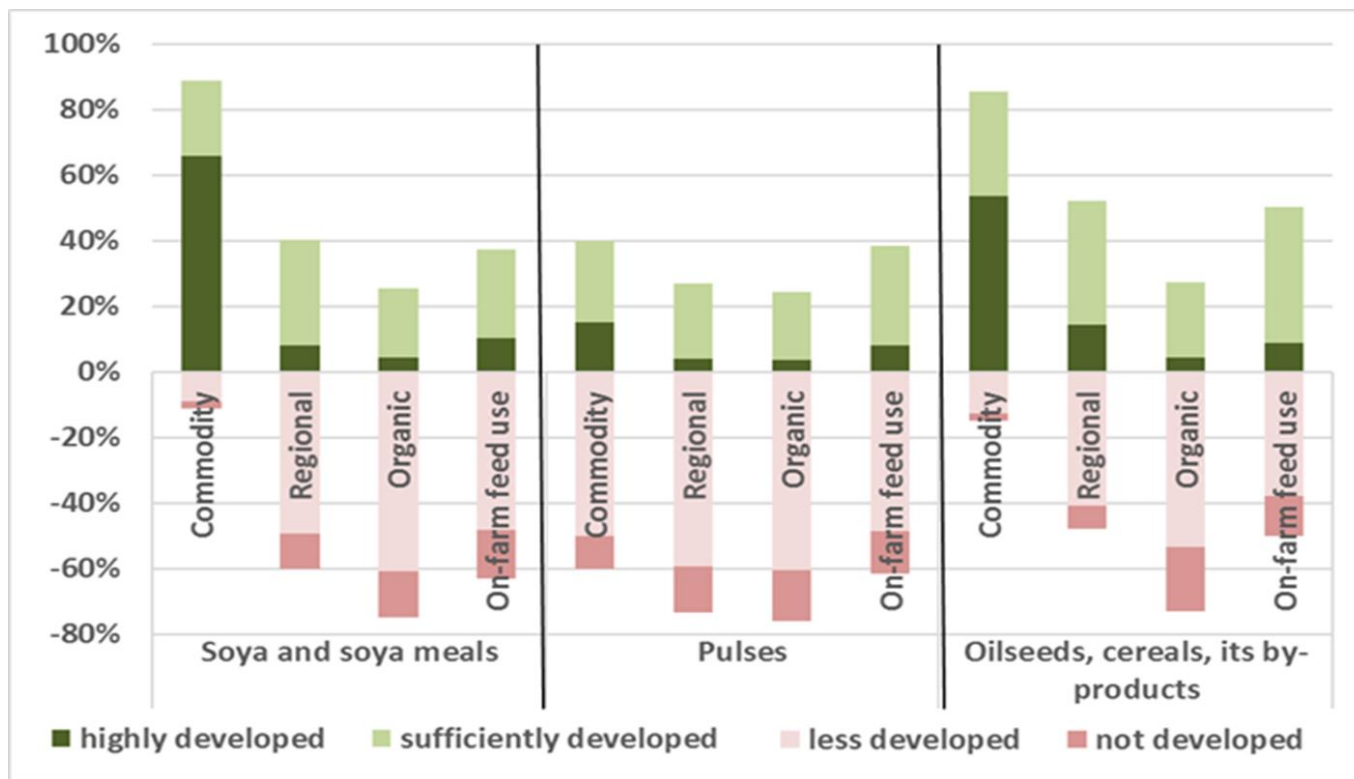


Actors in protein development (joint effort by authorities and private sector)



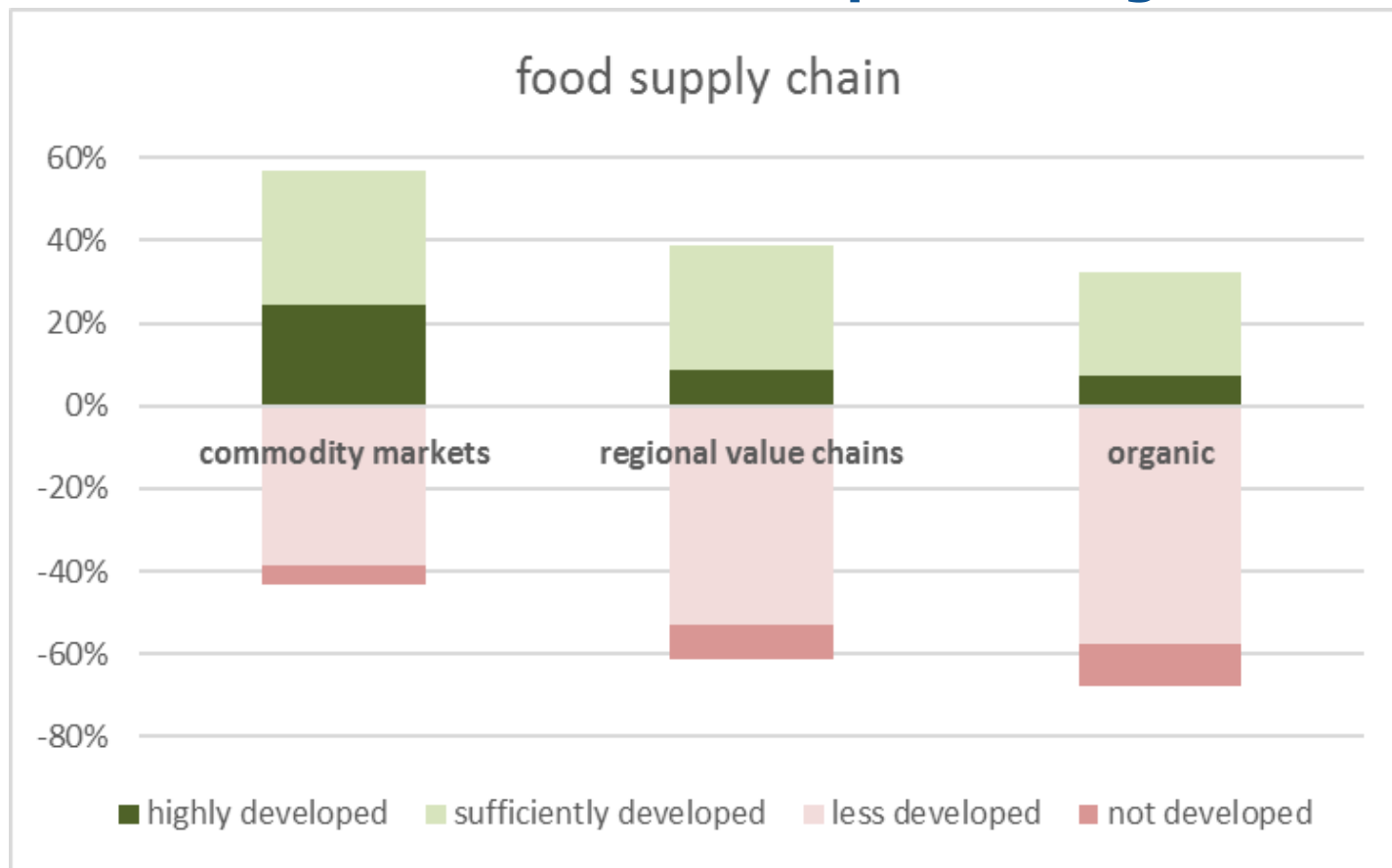
Feed supply chains

(commodity markets soya & oilseed most developed
Organic least developed)



Food supply chains

Needs further development in general





Results: Workshop 1

"Research and Innovation"

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



Results: Workshop 2

“Agronomic Practices & Environmental Benefits”

- *Agronomic practices*
 - Crop rotation (10% higher yields)
 - Reduced fertilizer needs
 - Breaking pest cycles
 - But also extra pest pressure
- *Environmental benefits*
 - Soil quality (longer roots)
 - Water quality (less fertilizers)
 - Biodiversity (pollinators)

Results Workshop 3 “Supply Chains”

- *Importance of cooperatives or collectors in the supply chain*
- *Multi annual commitments, for both farmers and industry*
- *Additional costs involved in non-GM feed (because of lower yields, administrative requirements, logistics...)*
- *Growing markets opportunities for non-GM feed and meat replacement products*



Upcoming activities

- *High Level Conference in Vienna 22/23 November*