

# STARCH EUROPE POLICY PRIORITIES

## CDG ARABLE CROPS - STARCH

2 DECEMBER 2019

# OUR INDUSTRY NUMBERS



**60.000**  
EU Farmers producing  
**24 Million**  
Tonnes of **RAW MATERIALS**

**73 PLANTS**  
in **20** EU Members States providing  
**16.000 JOBS**  
and revenues of **€7.4 Billion**



PROTEINS & FIBRES

**5.3M Tonnes**

STARCHES  
(Native & Modified)

**5M Tonnes**

STARCH DERIVATIVES  
(Maltodextrins, Sugars, Polyols)

**6M Tonnes**



FEED  
**5M Tonnes**



FOOD & DRINK  
**>6M Tonnes**



NON-FOOD  
**>4.5M Tonnes**



FUEL  
**<0.5M Tonnes**

# STARCH EUROPE MEMBERS



ALTIA



EMSLAND GROUP®  
using nature to create

Finnamyl



KRÖNER K STÄRKE  
... the power of nature!

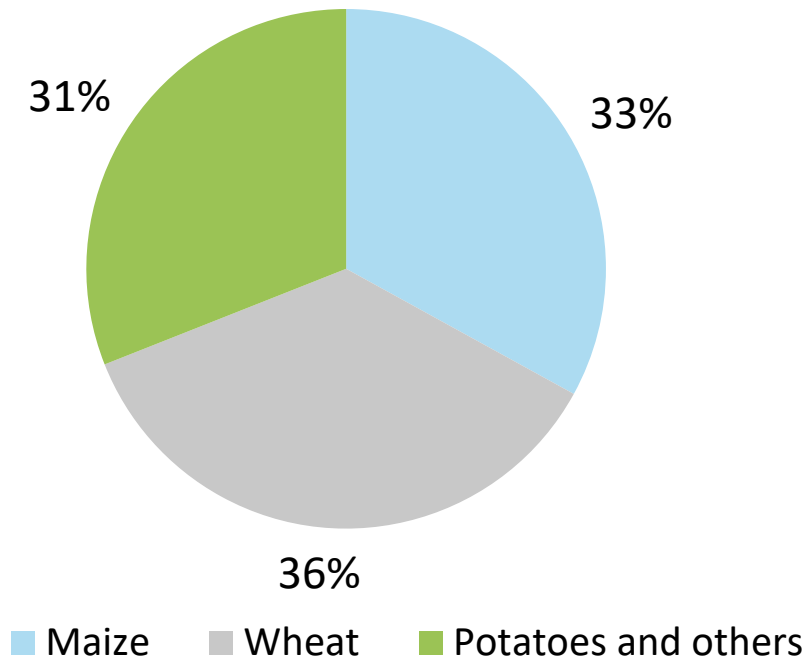


TATE & LYLE



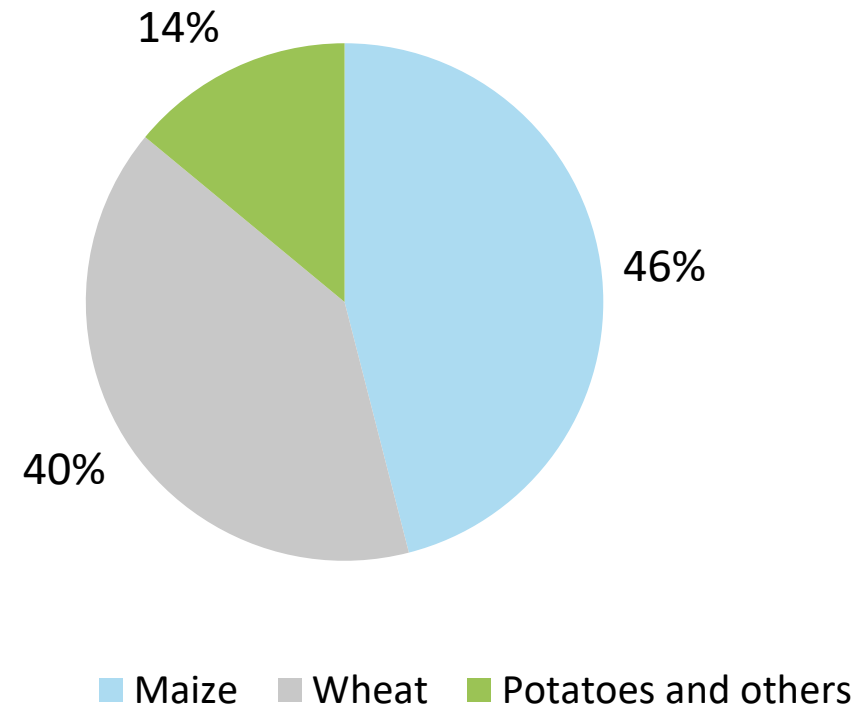
# MAIN PRODUCTION IN EU (2018)

Processed Raw Material



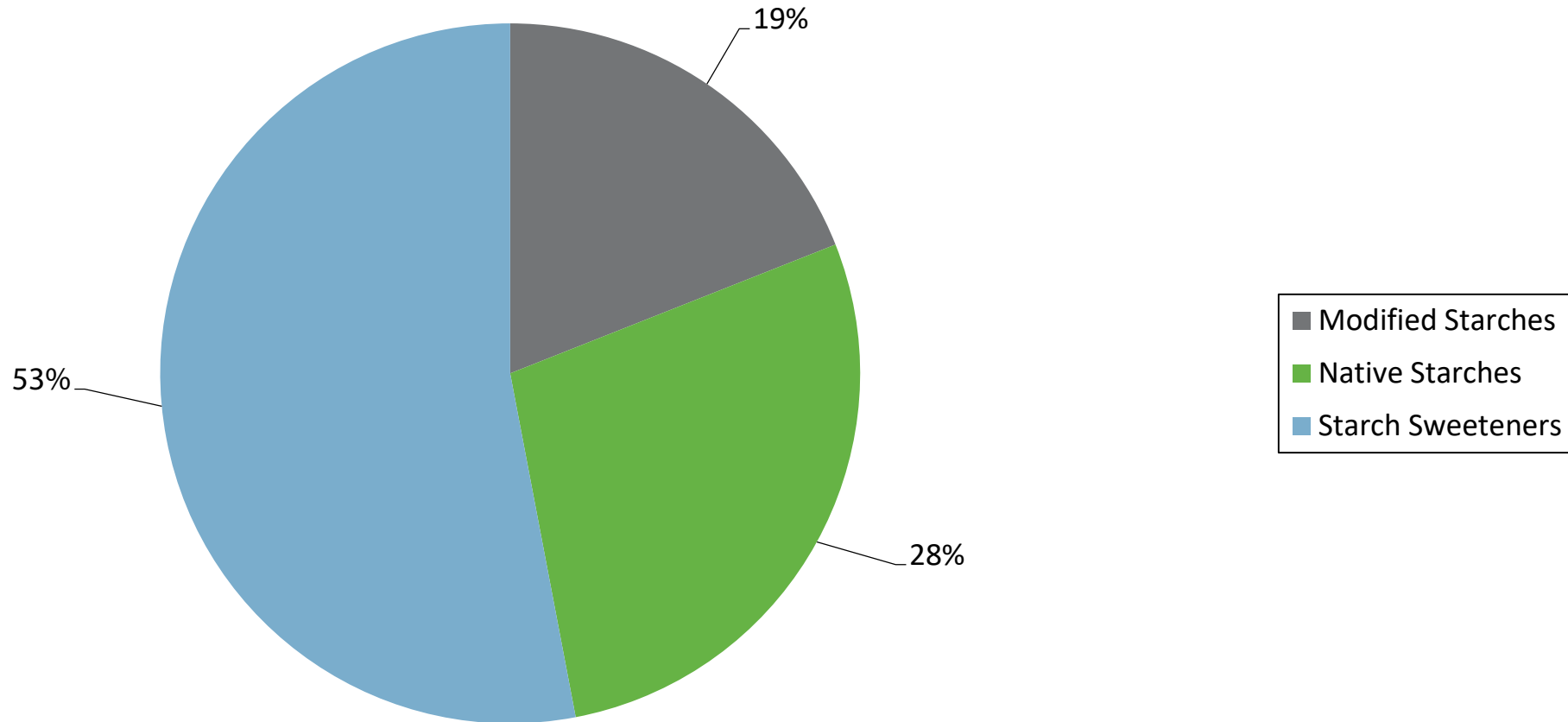
Total: 23,8 mio tonnes

Starch Products in Starch Equivalent



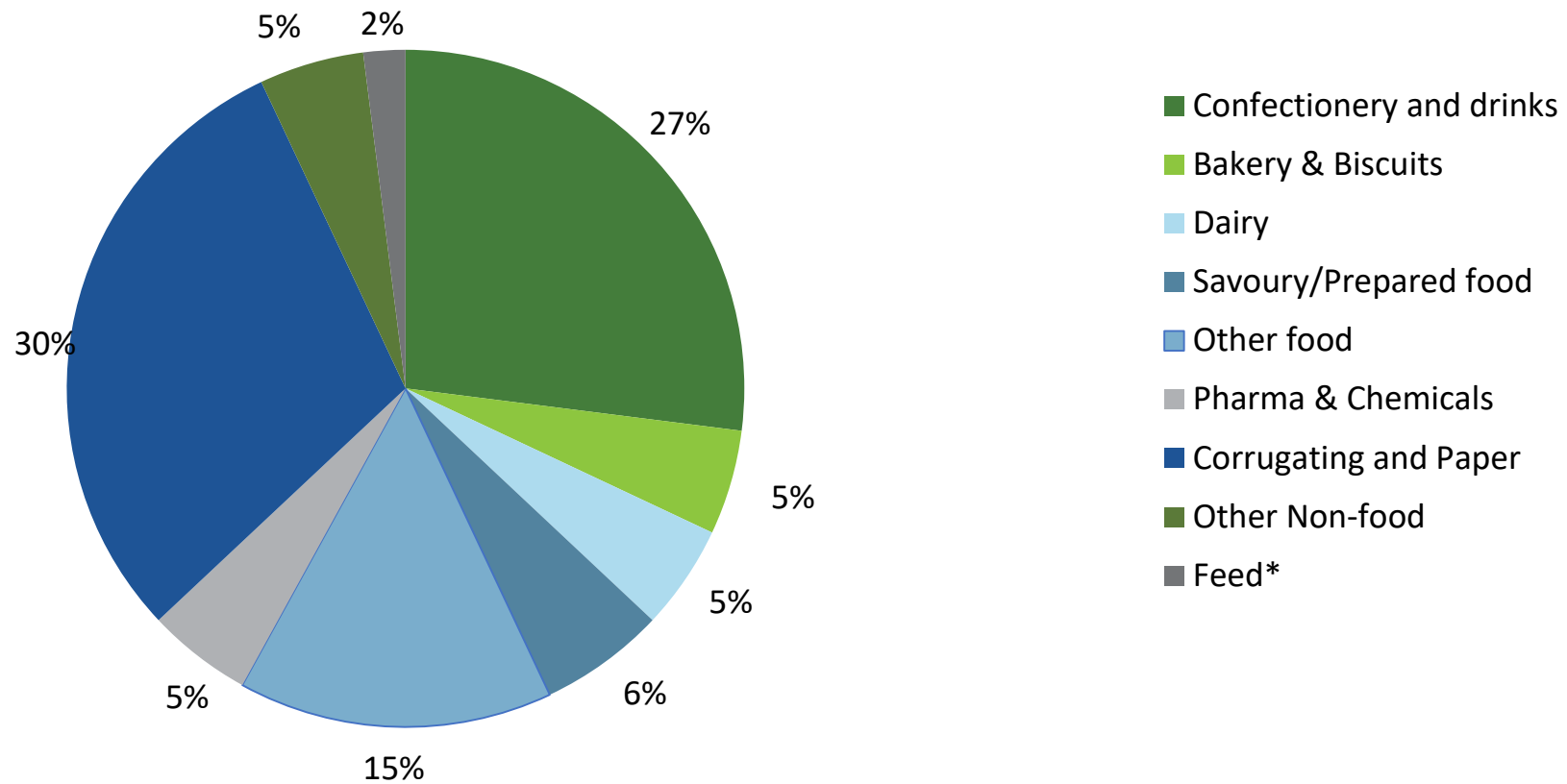
Total: 10,7 mio tonnes

# EU CONSUMPTION OF STARCH & STARCH DERIVATIVES-2018



Total market: 9,3 mio tonnes

# MAIN STARCH APPLICATIONS - 2018



\* Excluding co-products amounting to about 5 million tonnes

Source: industry statistics compiled and audited by  
PriceWaterhouseCoopers

# OPPORTUNITIES

- European Green Deal and Farm to Fork Strategy
- EU Bioeconomy Strategy
- EU Plant-Protein Plan
- The End of Sugar and Isoglucose Quotas

	In thousand tonnes		
<b>Sales to EU customers</b>	<b>2017</b>	<b>2018</b>	<b>% change</b>
Isoglucose > 41% fructose	629	585	-7 %
Of which isoglucose F42	374	344	-8 %
Of which isoglucose F55	225	214	-5 %

# OUR POLICY PRIORITIES 2019-2024

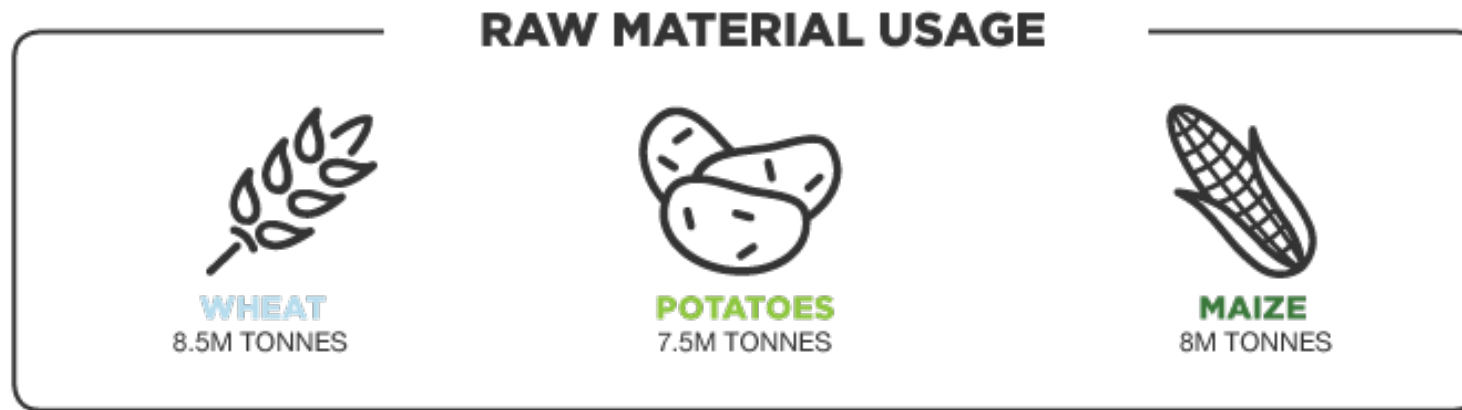
- CAP
- Single Market
- New Breeding Techniques
- Research, Innovation and Promotion (notably for Bioeconomy and Plant-Based Proteins)
- Regulatory Compliance Costs
- International Level Playing Field
- Brexit
- Health & Nutrition



# OUR POLICY PRIORITIES 2019-2024

## CAP, NBTs AND SINGLE MARKET

- Security of raw material supply and a level playing field (e.g. for starch potatoes and with sugar beet)



- New Breeding Techniques (NBTs): Pressure on pesticide use reinforces urgent need for clarity on NBTs
- EU Single Market: EU's most important achievement to date must be protected:
  - Concerns e.g. Dual Quality, Origin Labelling

# OUR POLICY PRIORITIES 2019-2024

## EU SUPPORT FOR RESEARCH & PROMOTION ACTIVITIES

- RESEARCH: Horizon Europe, Circular Biobased Europe, Food2030



**VERY HIGH PROTEIN  
CONTENT** (60% - 90%)

**1.1M TONNES**



**MEDIUM PROTEIN  
CONTENT** (15% - 30%)

**4.2M TONNES**



# OUR POLICTY PRIORITIES 2019-2024

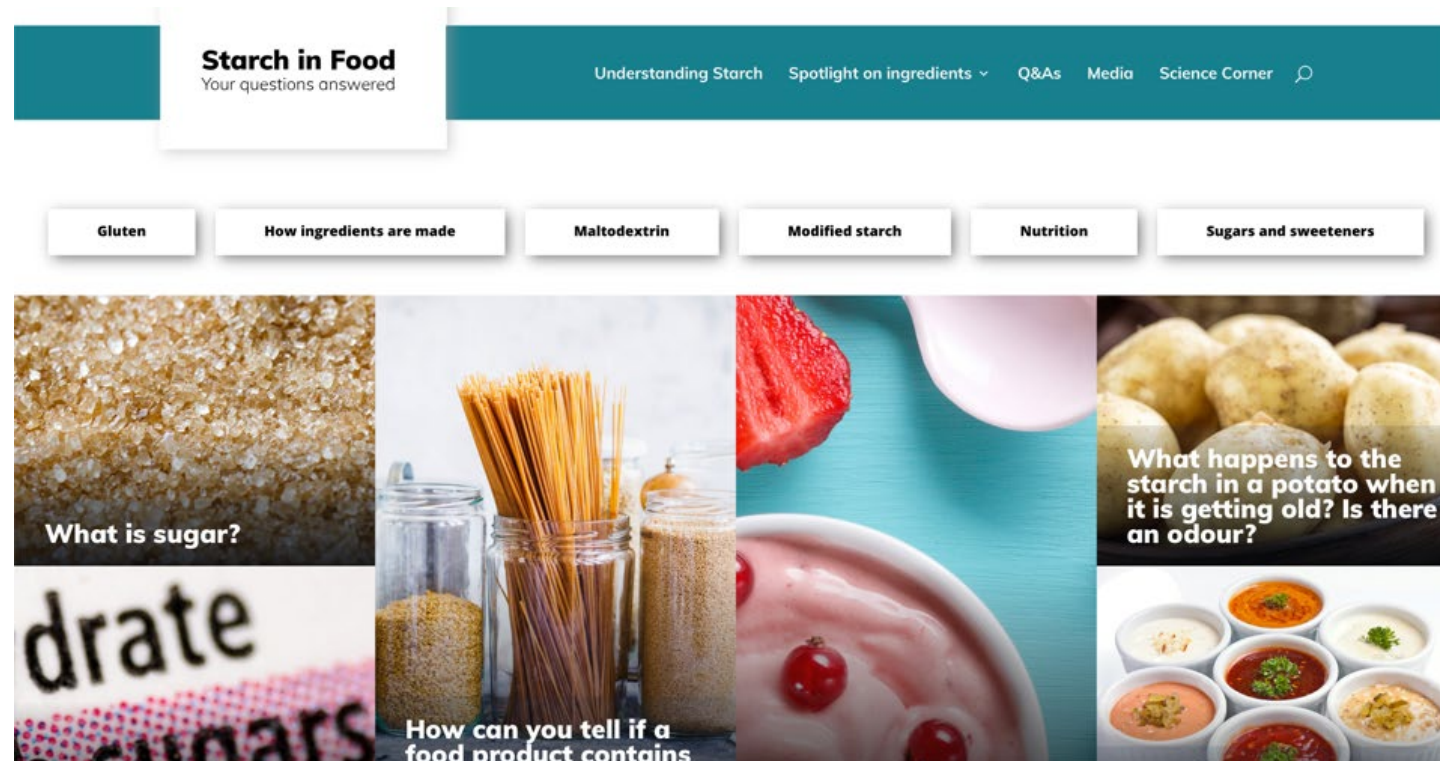
## COMPLIANCE COSTS AND TRADE

- Recognize higher regulatory compliance costs
  - Welcome EU carbon leakage list under EU ETS
- Import duties needed to compete with lower cost producers, notably US and Thailand
- Brexit
  - 900.000 Tons of EU27 starch exported to the UK
  - Minimum disruption to future EU/UK trade flows

# OUR POLICY PRIORITIES 2019-2024

## HEALTH & NUTRITION

- EU and Member State Health & Nutrition policy should be based on robust science

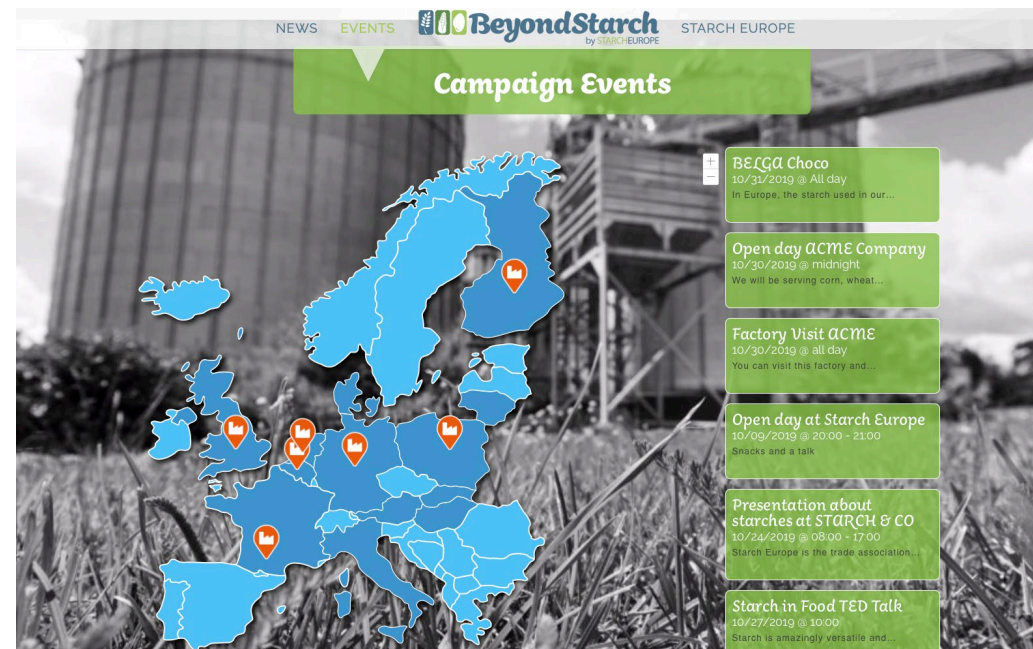


[WWW.STARCHINFOOD.EU](http://WWW.STARCHINFOOD.EU)

# BEYOND STARCH CAMPAIGN 2019

A campaign across our membership and across the EU, to celebrate Starch Europe's 60th anniversary and encourage all stakeholders to 'Get to know our industry of today & tomorrow'.

30 Events, big and small, across 11 EU Member States took place between 15 October and 27 November.



[WWW.BEYONDSTARCH.EU](http://WWW.BEYONDSTARCH.EU)

# The EU starch industry – a key enabler to boosting the bioeconomy in the EU

# THE EU BIOECONOMY



## Scope:

- all primary production sectors & all industrial sectors processing biological material to produce:
  - food
  - feed
  - bio-based products, and
  - energy

# WHAT IS THE BIOECONOMY WORTH?



**2.3** Trillion



**18** Million



**- 1 to 2.5**

billion tonnes of CO<sub>2</sub>  
equivalent / year by 2030



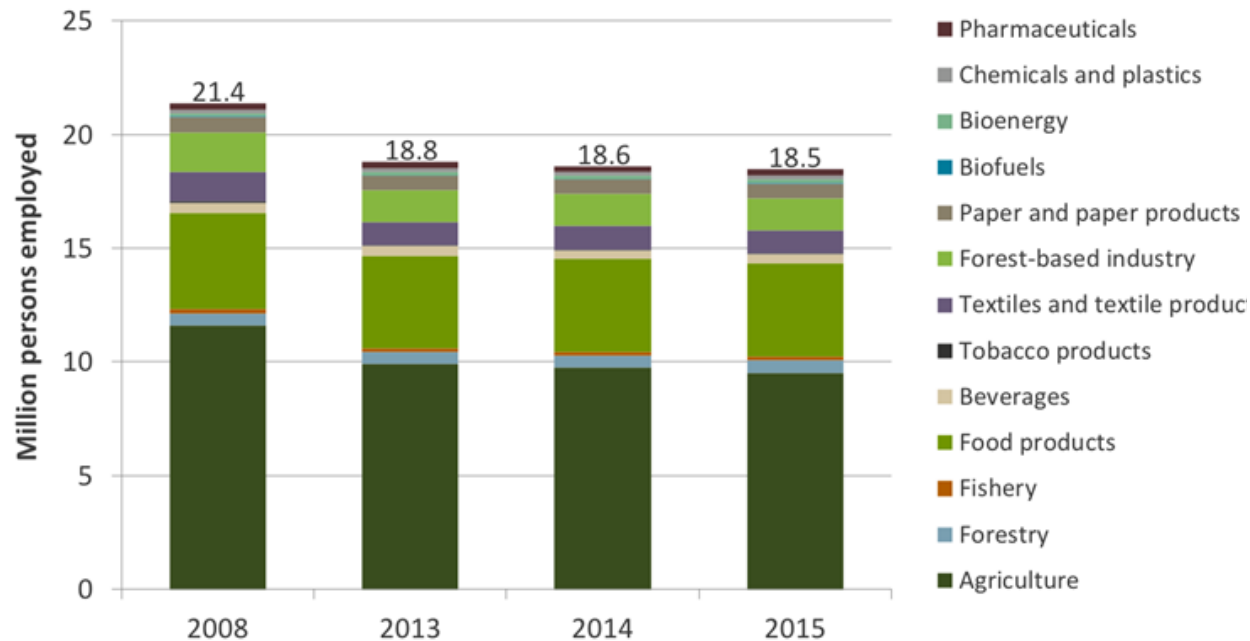
European Commission, Updated EU Bioeconomy Strategy, 2018

OECD, Industrial biotechnology and climate change, opportunities and challenges, 2011

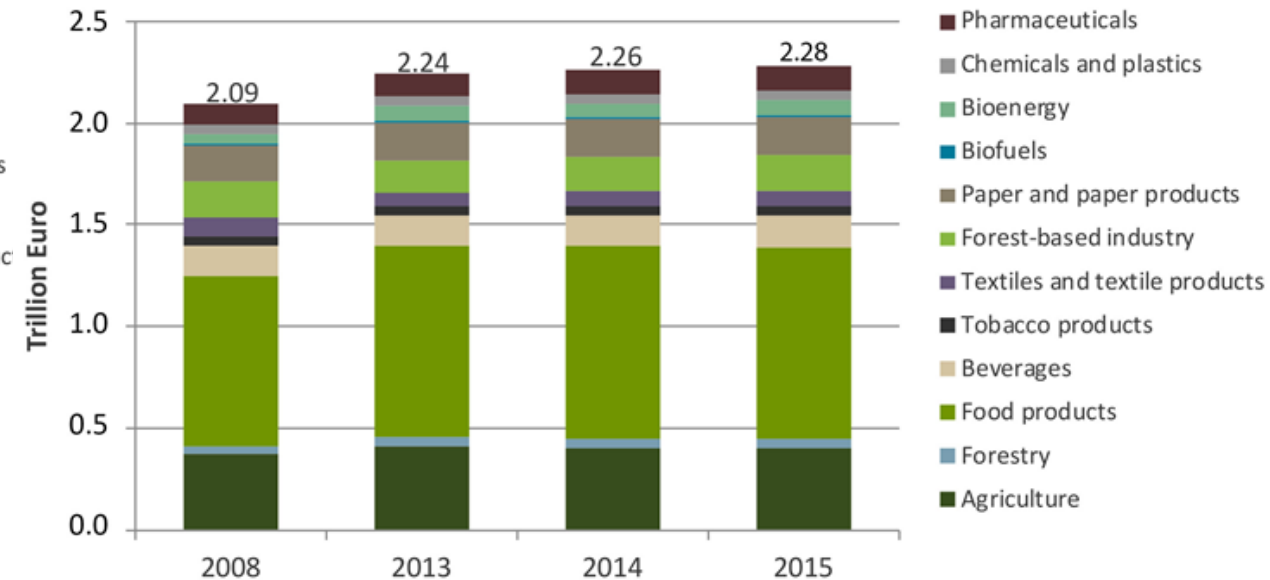


# EMPLOYMENT AND TURNOVER PER SECTOR

Employment in the bioeconomy in the EU-28,  
2008-2015



Turnover in the bioeconomy in the EU-28,  
2008-2015



# FOOD AND AGRICULTURE-RELATED KEY NUMBERS

		EMPLOYMENT (MILLION JOBS)	TURNOVER (BILLION EUR)	VALUE ADDED (BILLION EUR)
	AGRICULTURE	9.2	380	174
	FOOD, BEVERAGES AND OTHER AGRO-MANUFACTURING	4.5	1 153	233

Source: Data from 2015 quoted in the Commission's updated action plan on the bioeconomy

# INDUSTRIAL USES OF STARCH PRODUCTS & INGREDIENTS

Starch is a renewable and versatile ingredient, replacing fossil-based ingredients with renewable starch-based ones in:

- paper, cardboard and textiles
- fermentation, cosmetics, detergents, paints, bio-based plastics and packaging



# BIOECONOMY AROUND THE CLOCK



# LEVEL PLAYING FIELD WITH COMPETING INDUSTRIES



In the framework of the CAP, EU farmers must comply with some of the strictest rules in the world.



This set of rules provides the users of EU-grown biomass with guarantees in sustainability.



Renewable ingredients from the starch industry are functionally compatible with fossil-based chemicals. However, today there is no incentive to favour biobased products.

# Members of the European Bioeconomy Alliance



European  
Bioeconomy  
Alliance

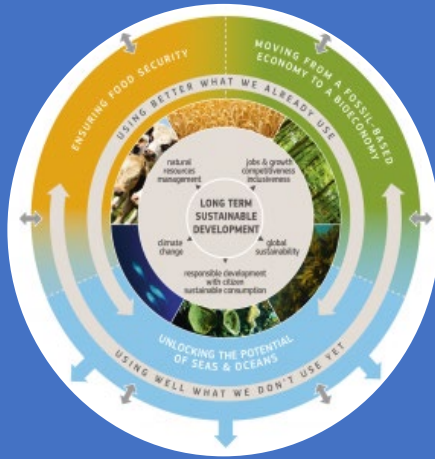


Forest-based Sector  
Technology Platform





# EU BIOECONOMY STAKEHOLDERS



## EU Strategy update:

- Public procurement
- 100m€ investment platform



- ## Awareness-raising Research and Innovation:
- 10 bn€ for cluster 6
  - Continuation of Public Private Partnership Circular-Biobased EU



- ## European Parliament's Intergroup on climate change, biodiversity and sustainable development – Working Group on the Bioeconomy

Starch Europe actively involved across the board

# INVESTMENT & MARKETS

- Kick-off the concrete initiatives aimed at fostering the investments & boosting the development of markets for bio-based products in 2020
- raise awareness about the benefits of bio-based products
- create a market for these bio-based products & boost their demand through e.g.
  - ☐ public procurement
  - ☐ standards
  - ☐ labels



# THE PUBLIC PRIVATE PARTNERSHIP FOR THE BIO-INDUSTRIES – CIRCULAR BIO-BASED EUROPE



## BBi JU was part of the EU Bioeconomy Strategy in 2012

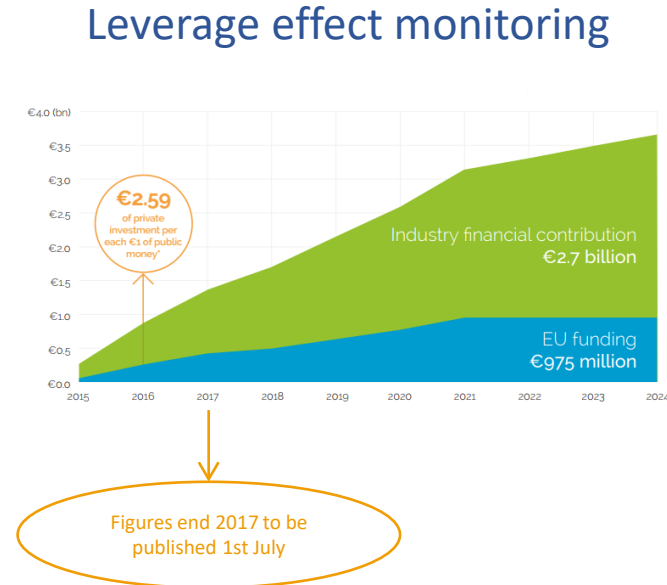
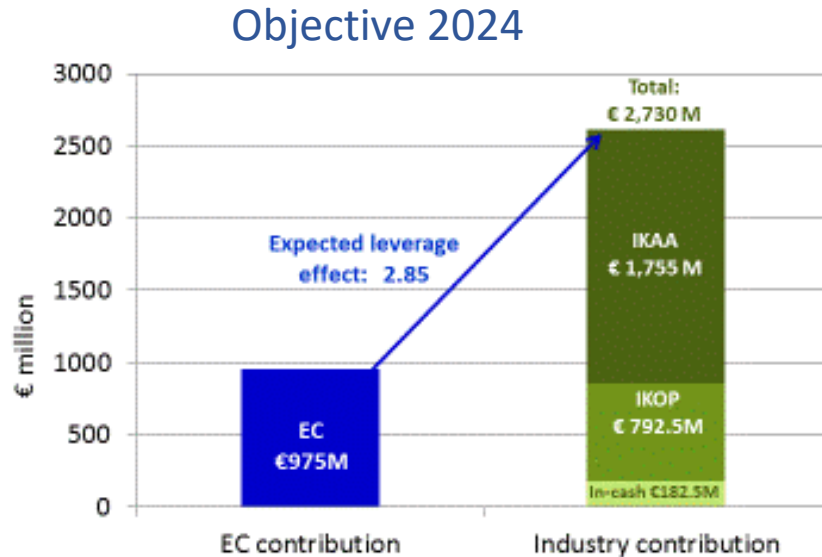
### Mission

Under Horizon 2020 rules, implement the Strategic Innovation and Research Agenda (SIRA) developed by the European Bio-based Industries Consortium (BIC) and endorsed by the European Commission (EC)

### European public-private partnership (iPPP) aims at:



# EU ADDED VALUE AND PRIVATE INVESTMENTS



- Leverage effect overall on track
  - BIC members investment in pipeline: 2014: € 2 bn → € 5 bn in 2017
- More information in BBI JU Annual Activity Report (AAR) 2017

# BBI JU PROJECT PORTFOLIO: GEOGRAPHICAL COVERAGE



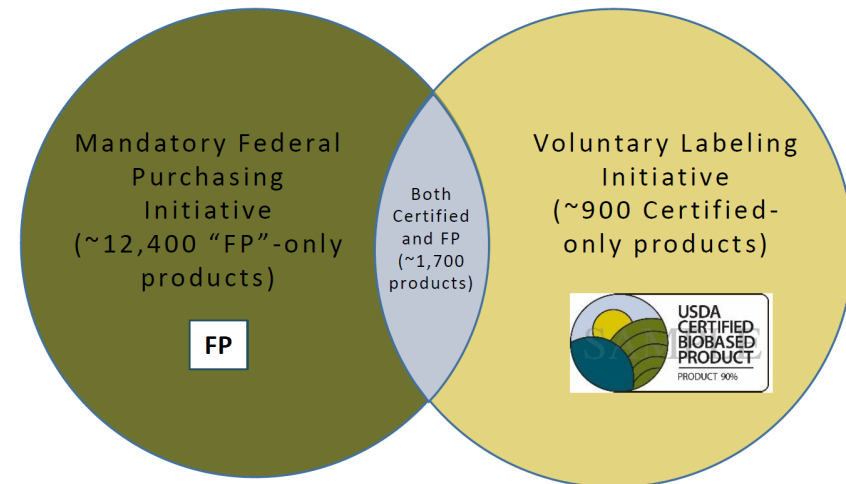
See [key figures](#)  
& [updated map](#)  
of the BBI JU  
2014-2019  
Achievements of  
a high-impact  
initiative for the  
bioeconomy in  
Europe on  
YouTube

# PUBLIC PROCUREMENT IN THE USA

USDA BioPreferred program's economic impact in one year:

- 369 billion US\$ contributed to US economy
- 4 million jobs attributed to biobased industry (excludes food etc.)
- USDA's estimated the value added from sales of biobased products to 126 US\$
- 2,250 biobased products certified on the market today, many EU

– <https://www.biopREFERRED.gov/BioPREFERRED/faces/pages/SuccessStories.xhtml>



**BioPreferred®**

# PUBLIC PROCUREMENT IN THE EU



## Buying Green!

- Based on DG ENV's green public procurement updated in the framework of the Circular Economy Action Plan:

- ☐ Introduce renewability as an eligible criterion

## 15 recommendations for an increase uptake of biobased products in public procurement

- Based on DG Grow's Expert Group on biobased products

- ☐ To be implemented at Member States level with a coordinating role of the new Commission

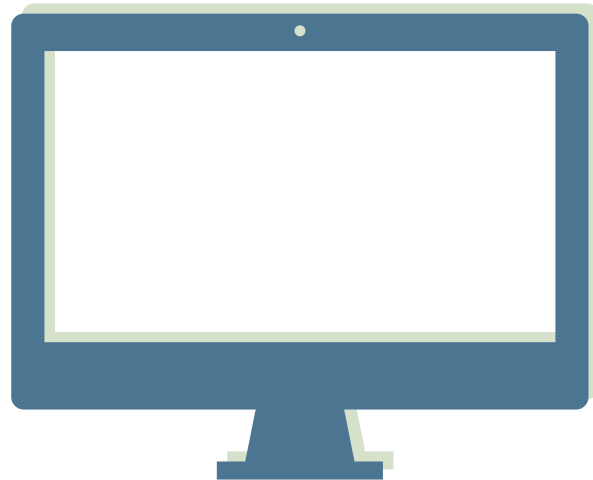
# LONG-TERM OPPORTUNITIES FOR THE BIOECONOMY

Starch Europe welcomes the update of the EU Commission's Action Plan & increased Research & Innovation funding & public procurement



The EU starch  
industry is a  
key enabler  
to the  
bioeconomy

# CONTACT STARCH EUROPE



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