



STARCH EUROPE

THE EU STARCH INDUSTRY

CDG Starch

14 November 2024

STARCH EUROPE MEMBERS



EUROPEAN STARCH INDUSTRY FIGURES



70 PLANTS – EU 27



22M TONNES
EU 27



16.000
JOBS – EU 27



60.000 FARMERS



4,7M Tonnes
Native & Modified Starches



4,5M Tonnes
Starch Derivatives



> 5M Tonnes
Proteins & Fibres



FOOD
5M Tonnes



FEED
5M Tonnes

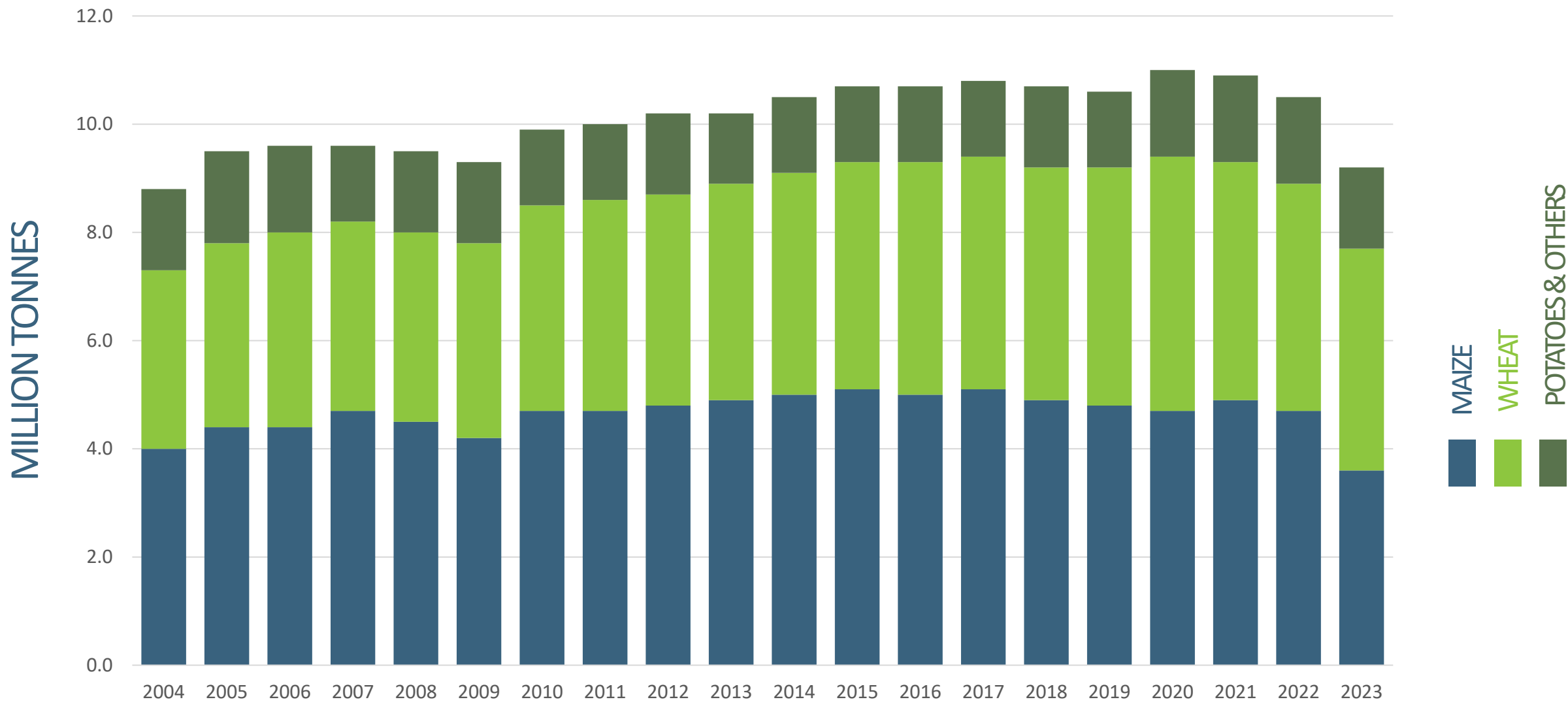


NON-FOOD
4M Tonnes



FUEL
< 0.5M Tonnes

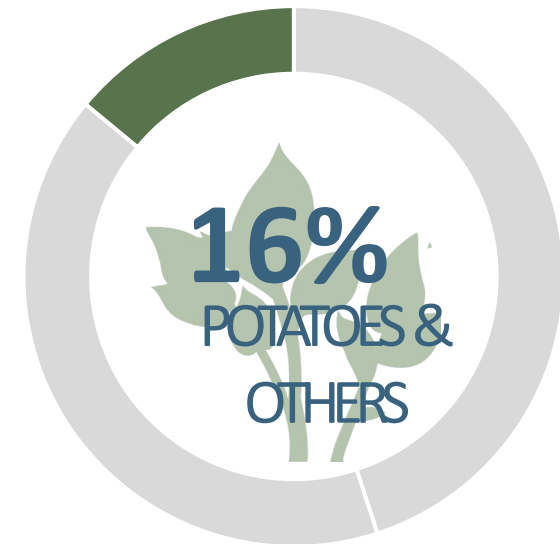
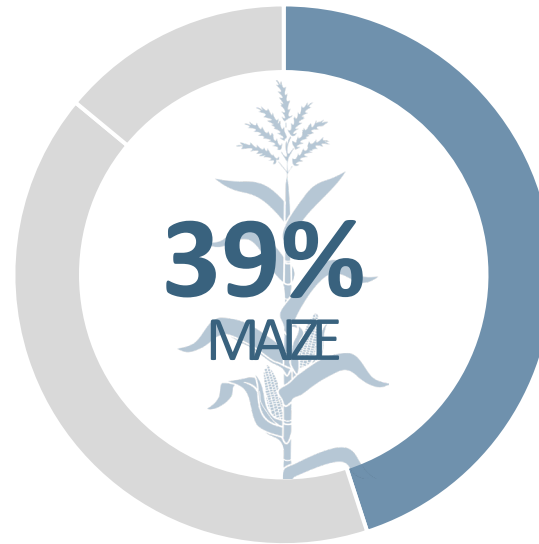
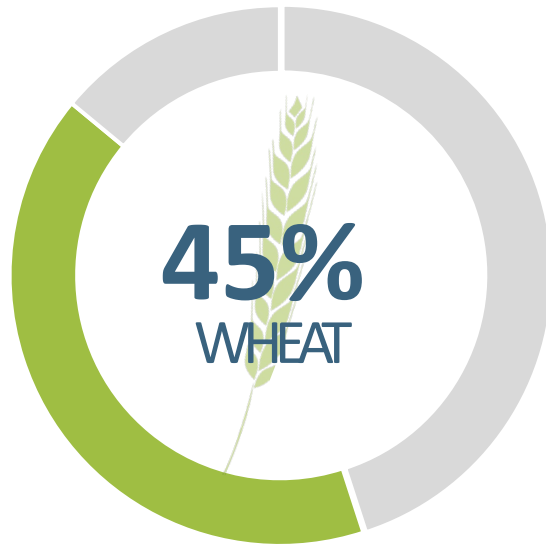
STARCH PRODUCTION IN THE EU



EU25: 2004-2006 | EU27: 2007-2012 | EU28: 2013-2020 | EU27: 2021

MAIN PRODUCTION IN EU (2023)

STARCH PRODUCTS IN STARCH EQUIVALENT

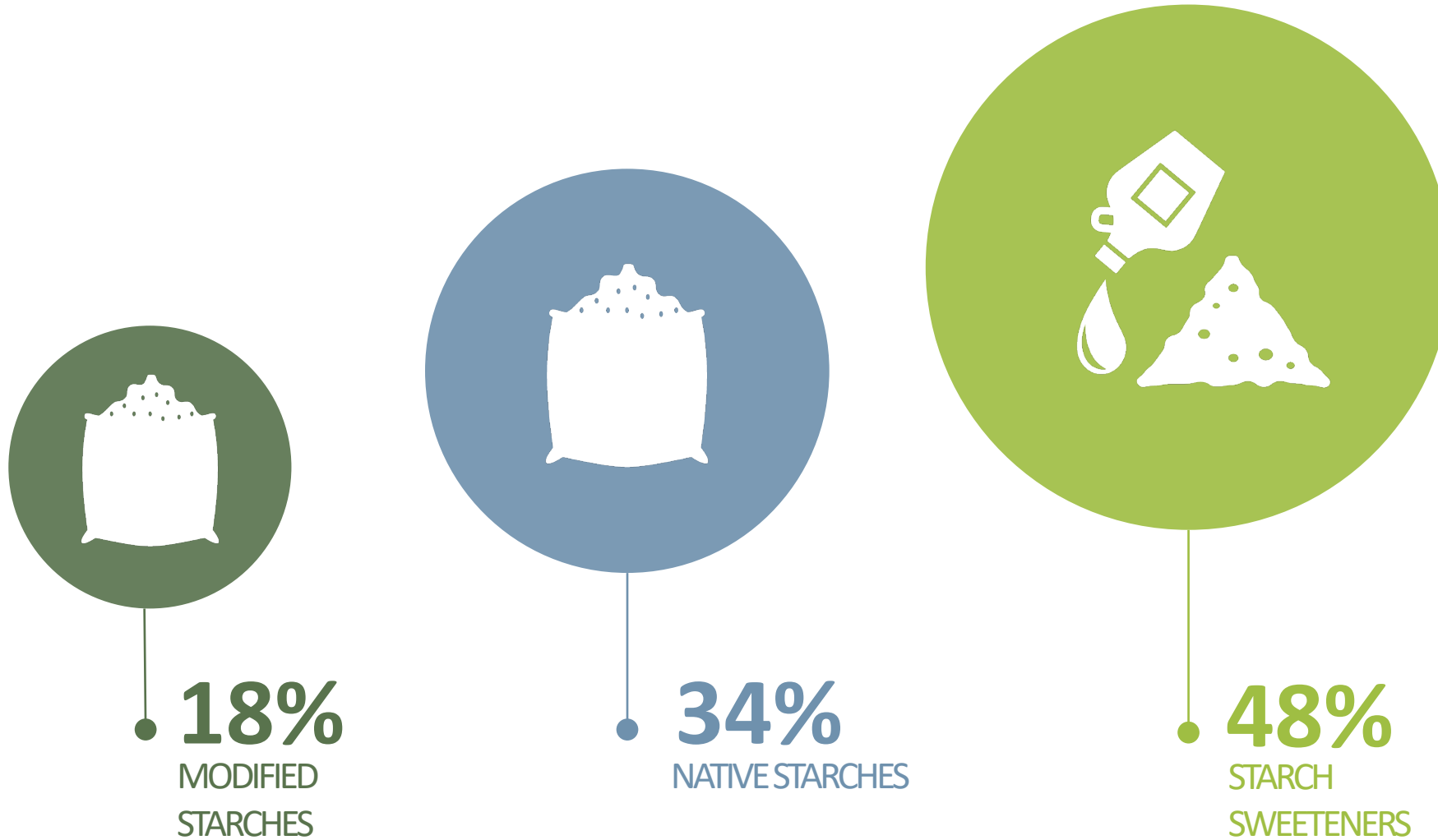


9,2M TONNES
STARCHES & DERIVATIVES

MAIN PRODUCTION IN EU / STARCH PRODUCTS IN STARCH EQUIVALENT 2021-2023

	2021	2022	Evolution % 2021/2022	2023	Evolution % 2022/2023	Evolution % 2021/2023
Maize	4,853,844	4,674,004	-3.71%	3,613,465	-22.69%	-25.55%
Wheat	4,396,997	4,178,869	-4.96%	4,114,099	-1.55%	-6.43%
Potato + Others	1,635,606	1,600,431	-2.15%	1,500,321	-6.26%	-8.27%
TOTAL	10,886,447	10,453,304	-3.98%	9,227,885	-11.72%	-15.24%

EU CONSUMPTION OF STARCH & DERIVATIVES (2023)



EU 27

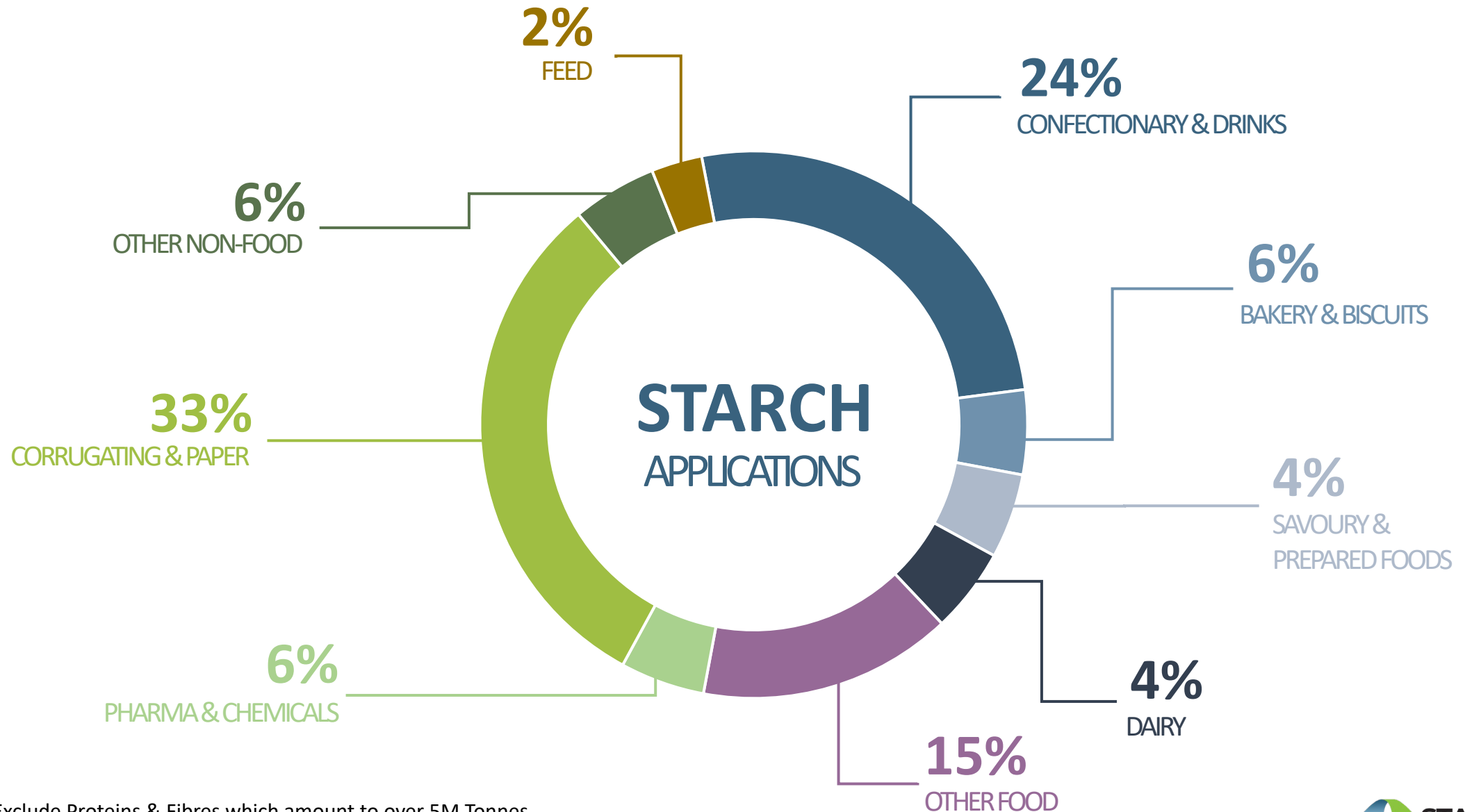


7,2M TONNES
STARCHES & DERIVATIVES

EU CONSUMPTION OF STARCH & DERIVATIVES 2021-2023

	2021	2022	2023	Evolution % 2022/2023	Evolution % 2021/2023
Natives	2,791,869	2,637,457	2,433,424	-7.74%	-12.84%
Sweeteners	4,214,499	4,113,302	3,476,282	-15.49%	-17.52%
Modified	1,627,927	1,549,692	1,266,258	-18.29%	-22.22%
Total	8,634,295	8,300,451	7,175,964	-13.55%	-16.89%

MAIN STARCH APPLICATIONS 2023



EU 27

All Figures Exclude Proteins & Fibres which amount to over 5M Tonnes
 Source: industry statistics compiled and audited by PriceWaterhouseCoopers

MAIN STARCH APPLICATIONS 2021-2023

	2021	2022	2023	Comparison % 2022/2023	Comparison % 2021/2023
Confectionary & Drinks	2,003,971	1,959,964	1,747,720	-10.83%	-12.79%
Bakery & Biscuits	415,117	400,203	401,187	0.25%	-3.36%
Dairy	356,402	364,321	321,929	-11.64%	-9.67%
Prepared food	325,558	317,614	286,004	-9.95%	-12.15%
Other food	1,325,189	1,346,968	1,075,157	-20.18%	-18.87%
Pharma & chemicals	576,003	507,282	377,860	-25.51%	-34.40%
Corrugating and paper making	2,918,353	2,695,080	2,419,801	-10.21%	-17.08%
Other non-food	515,057	506,542	404,096	-20.22%	-21.54%
Feed/Aquaculture	198,573	202,708	142,155	-29.87%	-28.41%

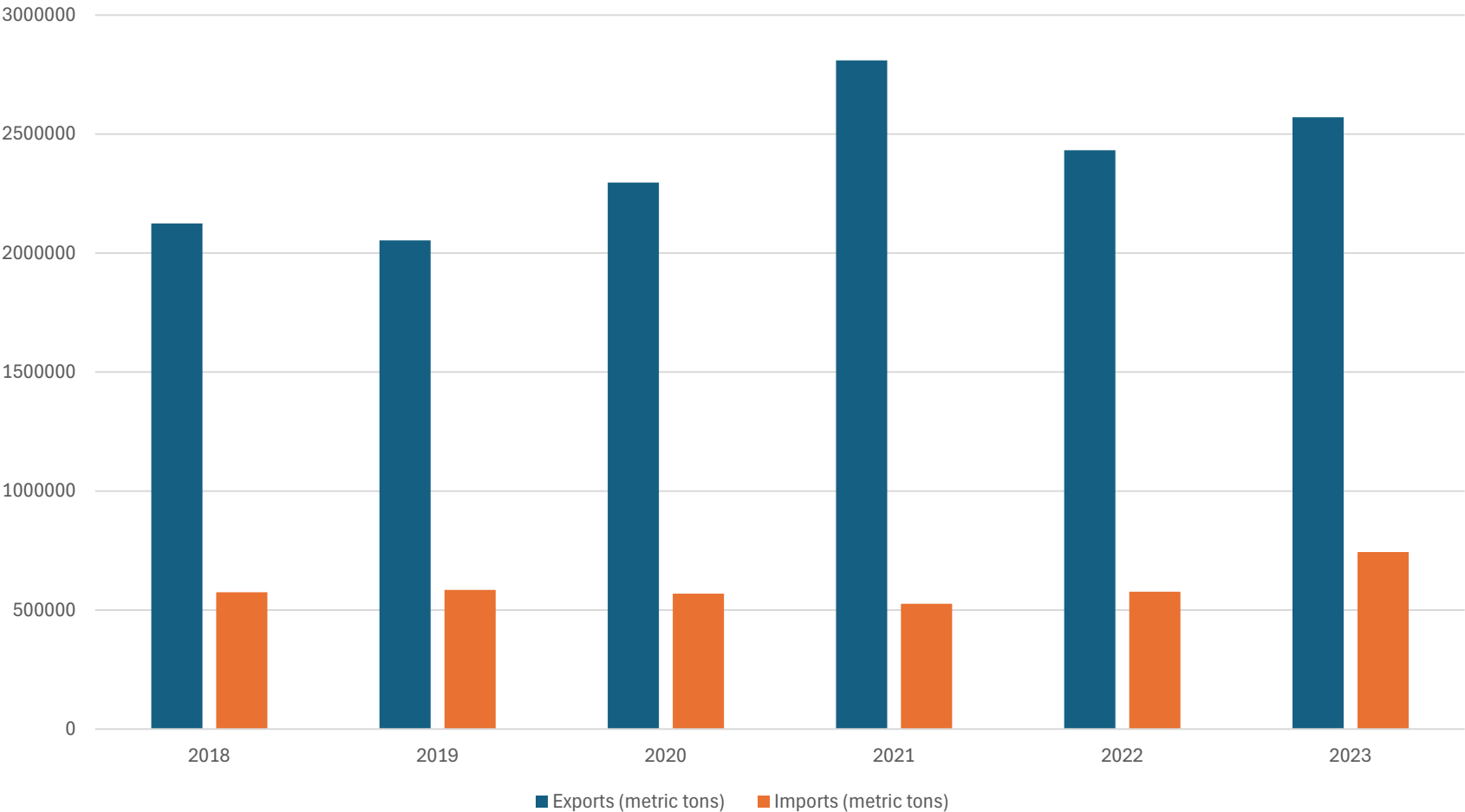
SALES OF ISOGLUCOSE IN EU

	2017	2018	2019	2020	2021	2022	2023
Isoglucose (>41% Fructose)	628.958	584.972 (-7%)	544.143 (-7%)	500.147 (-8%)	512.171 (+2%)	498.505 (-3%)	430.826 (-14%)
Of which F42	373.699	344.184	303.945	285.222	271.417	261.315 (-4%)	207.889 (-20%)
Of which F55	224.760	213.823	214.093	190.141	215.083	217.488 (+1%)	214.677 (-1%)

EU 28: 2017-2020

EU 27: 2021

EU total trade of starch industry products (2018 – 2023)



Conclusions from 2023 figures

Challenging times but the fundamental strengths of the sector remain

- » The challenges are driven by the overall EU economic situation and resultant lower short term EU demand
- » Higher EU production costs (notably energy) not yet translating into major increase in imports overall, but need to carefully monitor specific concerns (e.g dextrose/polyols from China and tapioca starch from Vietnam since FTA/TRQs introduced)
- » But the sector has demonstrated its resilience for decades and will continue to do so, through constant innovation to satisfy changing consumer demands
- » The fundamental strengths remain, notably as a sector which is, inter alia:
 - A pioneer in the bioeconomy, a sector which must develop further in the EU's efforts to decarbonise
 - A major producer of EU plant-based proteins
- » With the right policy support, the sector will remain a key contributor to the EU's overall sustainability ambitions

Commission work programme

Starch Europe policy priorities/asks

- » A reliable supply of sustainable EU agricultural raw materials at competitive prices
 - Including increased support to farmers
- » Financial and policy support to reach decarbonisation targets
- » A holistic approach to sustainability
 - Prioritising the Green Deal industrial plan including a coherent bioeconomy strategy and protein strategy, underpinned by science based policy making and communication
- » A supportive EU trade policy
 - Rules based international system and recognition of EU starch industry sensitivity in FTA negotiations, in particular with Thailand and Indonesia
- » A predictable regulatory environment
 - With a focus on encouraging technological development and advancing the Single Market
 - Proportionality, full stakeholder input and adequate transition times

Commission work programme

Helpful new reports

- » Strategic Dialogue on the Future of EU Agriculture recommendations published in September, inter alia:
 - Recognition of the importance of an overall food chain approach
 - Importance of bio-economy
 - Balanced approach to trade
 - Importance of NGTs
 - Diet – encourages Plant based foods and no negative reference to food processing
 - Primary Food Processors were not a direct participant in the dialogue but should be in the development of the subsequent vision and implementation
- » Draghi report on 'Future of European Competitiveness' also published in September
 - Decarbonisation and competitiveness
 - Energy cost reductions including investment in renewable energy and grid capacity
 - Importance of innovation
 - Alignment of trade, industrial and sustainability policies
 - Reducing regulatory burden and completing the Single Market
 - Additional annual investment of 750-800 billion Euros