The Development of Plant Proteins in the European Union

State of play

CDG Arable Crops

7 September 2018

Agenda

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

Context: a lot of interest

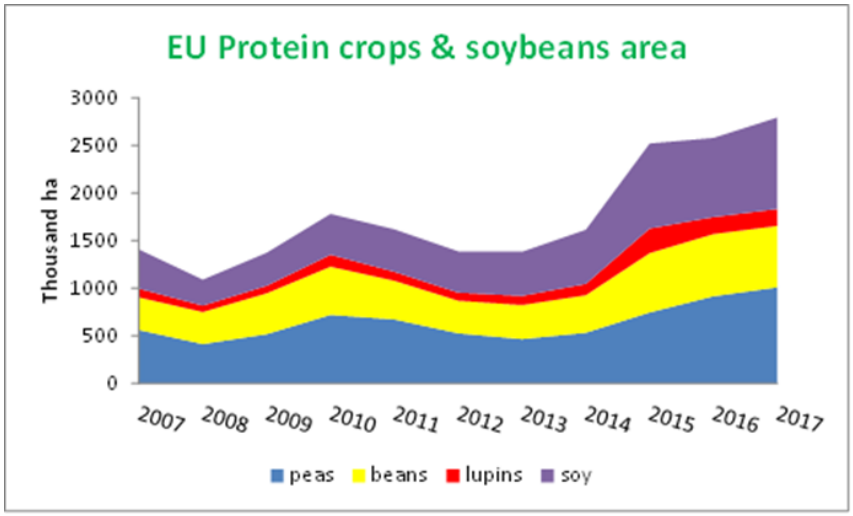
- *Various requests from **stakeholders** on "plant proteins" (e.g. FEFAC Conference June 2017)*
- ***Council**: discussions on plant proteins at the Council level mid-2017 on "**Soya Declaration**" + February 2018 about work programme for the EU protein plan – broad support from Member States for the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

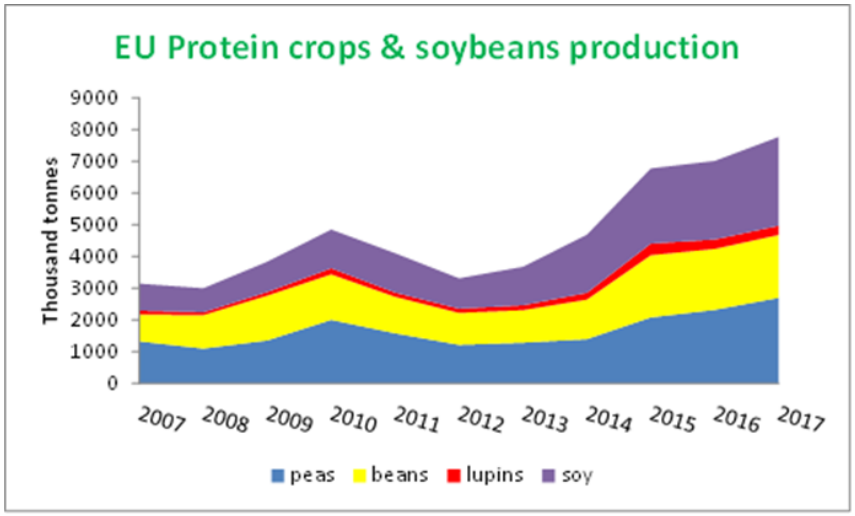
Context: EU protein crops and EU soya Production on the rise

Area/production more than doubled since 2013

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

EU soya: 2.8 Mio tonnes





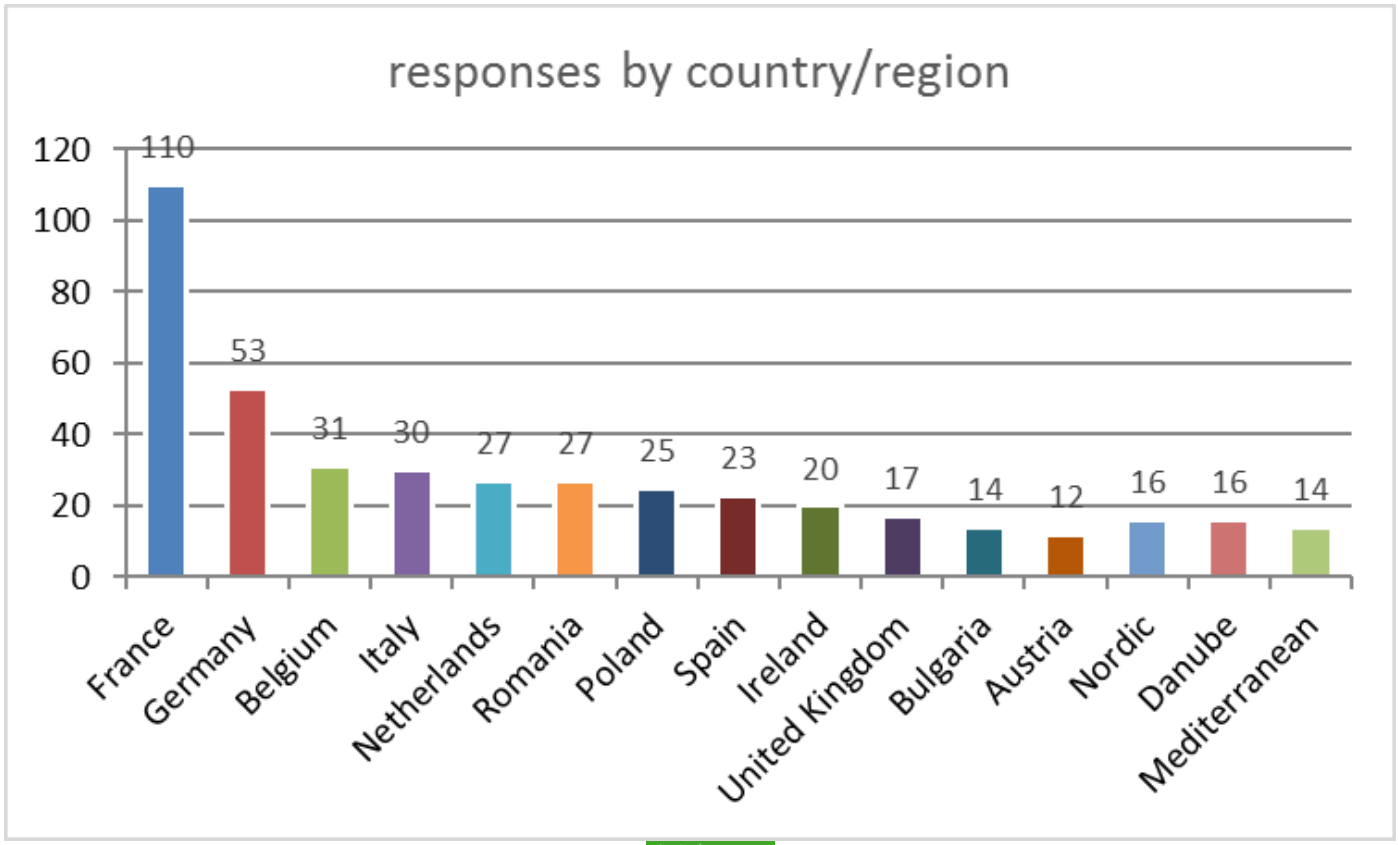
Results: Stakeholder Survey

- 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

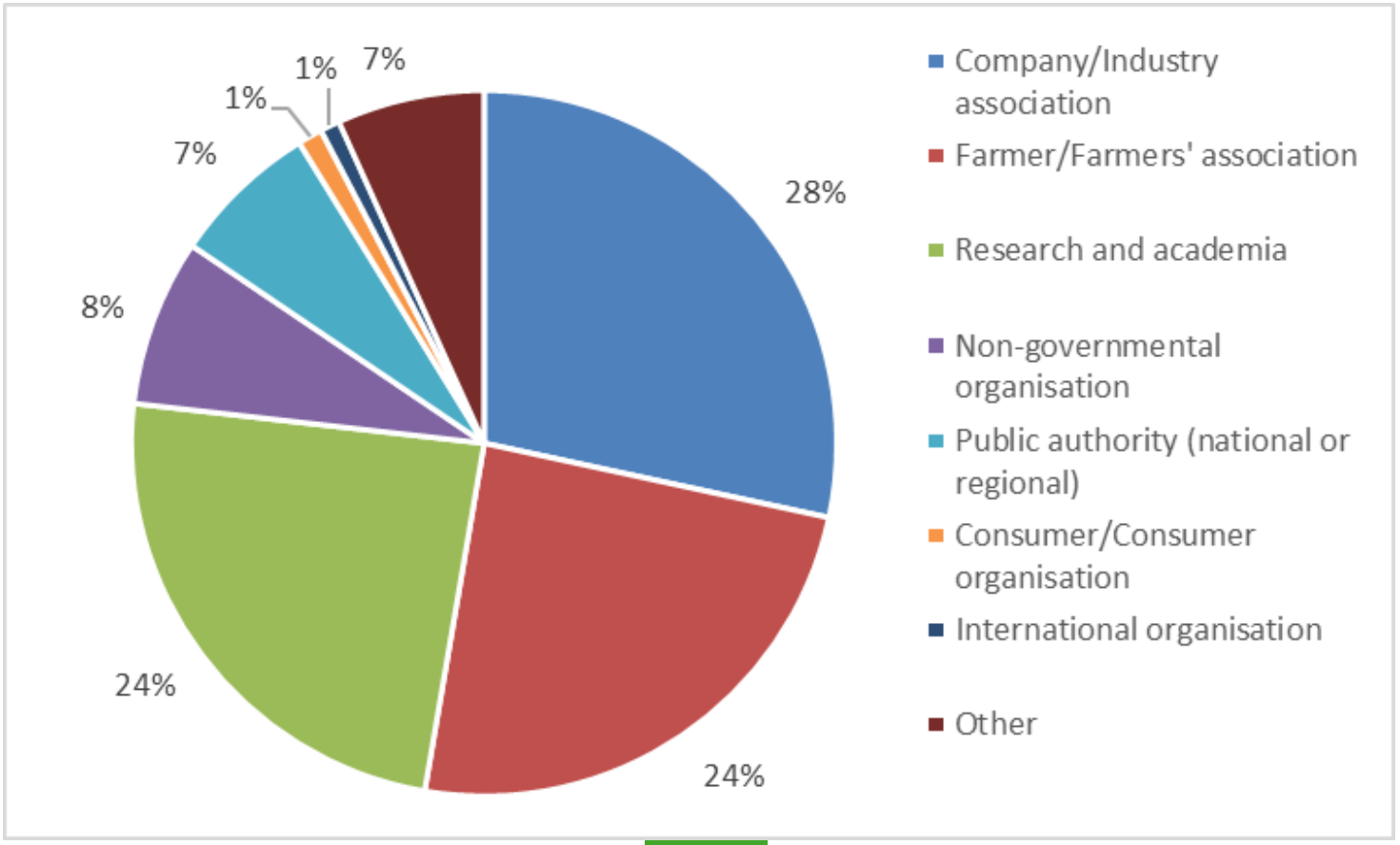
- **The development of EU protein plants should be a joint effort between different authorities, farmers and industry**

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

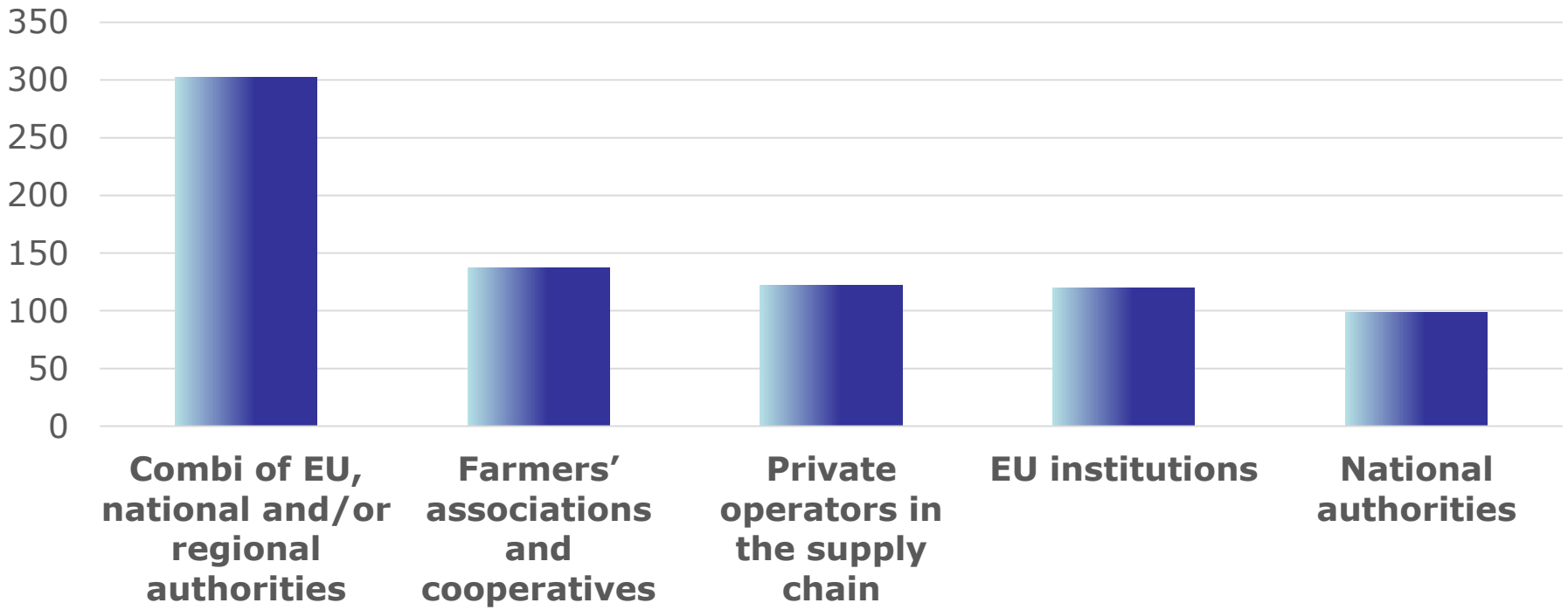


European Commission

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



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

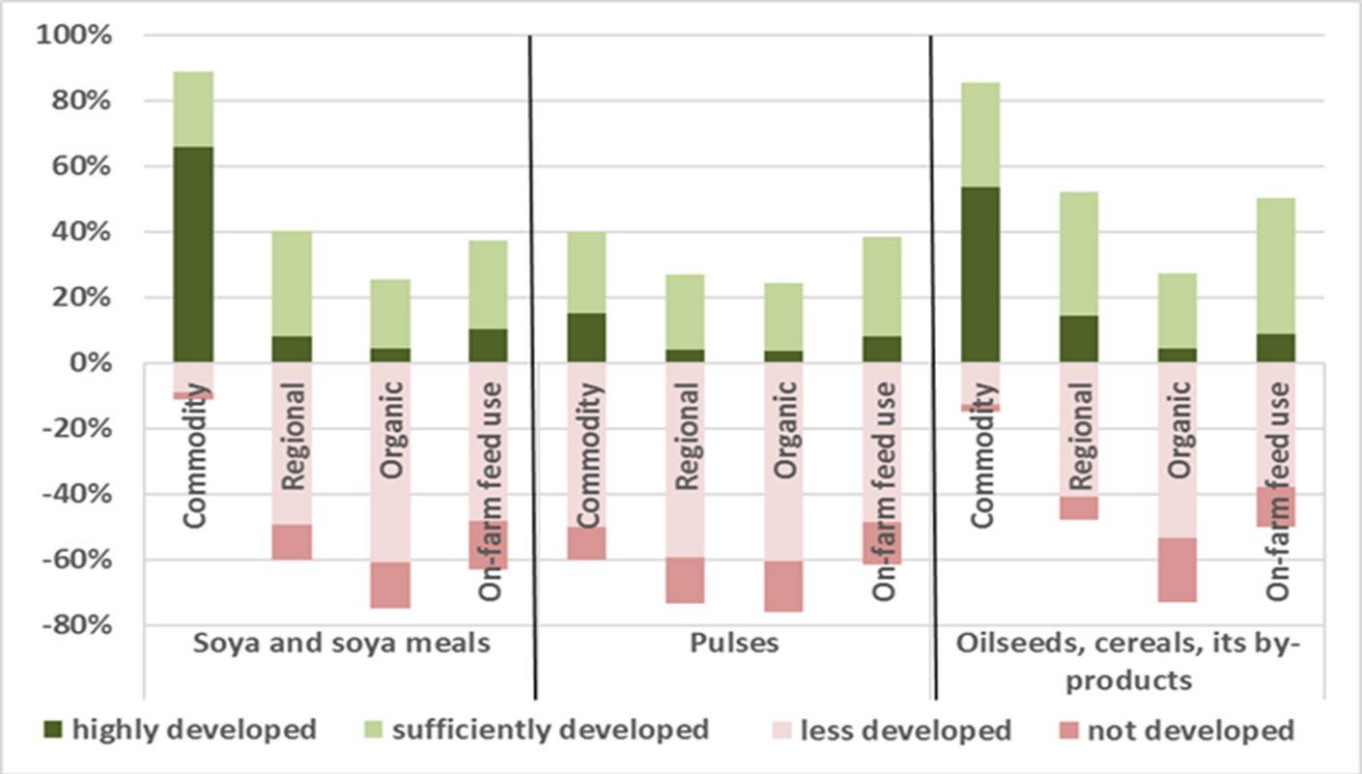


Agriculture and Rural Development

European Commission

Feed supply chains

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



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

- *Last workshop* **"Market Segments"**
  - 17/18 September in the Netherlands.

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