



EU Protein Plan State of play

**Crops Market Observatory
12th April 2018**



Political context - Council

- Commissioner Hogan presented work programme to prepare the EU protein plan at AGRIFISH Council (19 Feb)
- Broad support by Member States (and link with EU Soya declaration)
- Austria offered to host the EU Conference on Plant Proteins (22/23 November)



Political Context - EP

- Own initiative report from EP by MEP Denanot
- Broad range of issues addressed including a call for a "European strategy for the promotion of protein crops"
- COMAGRI voted in March over about 400 amendments
- Adoption in EP Plenary planned on 16 April



Timelines Overview

- 1. Q1+Q2-2018: fact-finding phase through**
 1. Stakeholders survey
 2. Market Study
 3. Thematic workshops
 4. Bilateral meetings
- 2. Q3-2018: preparation of draft Commission report**
- 3. Q4-2018: publication of Commission report on a “Protein Plan for Europe”** including presentation in a high-level EU conference on plant proteins in Austria



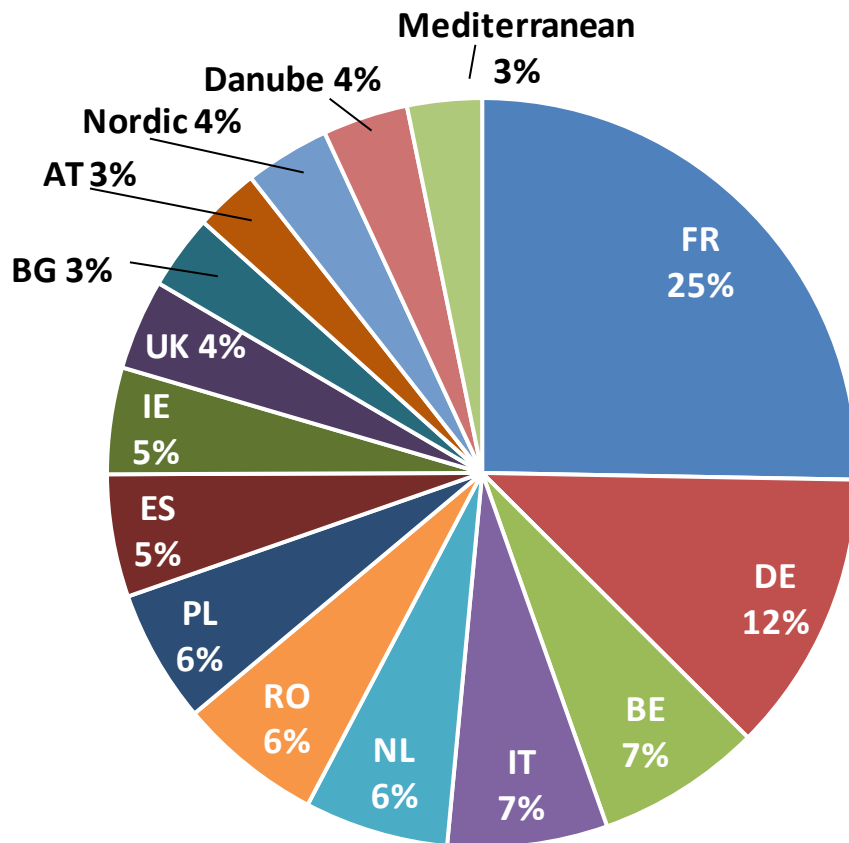
Actions - Stakeholder Survey

- 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

Responses by Geographical Origin

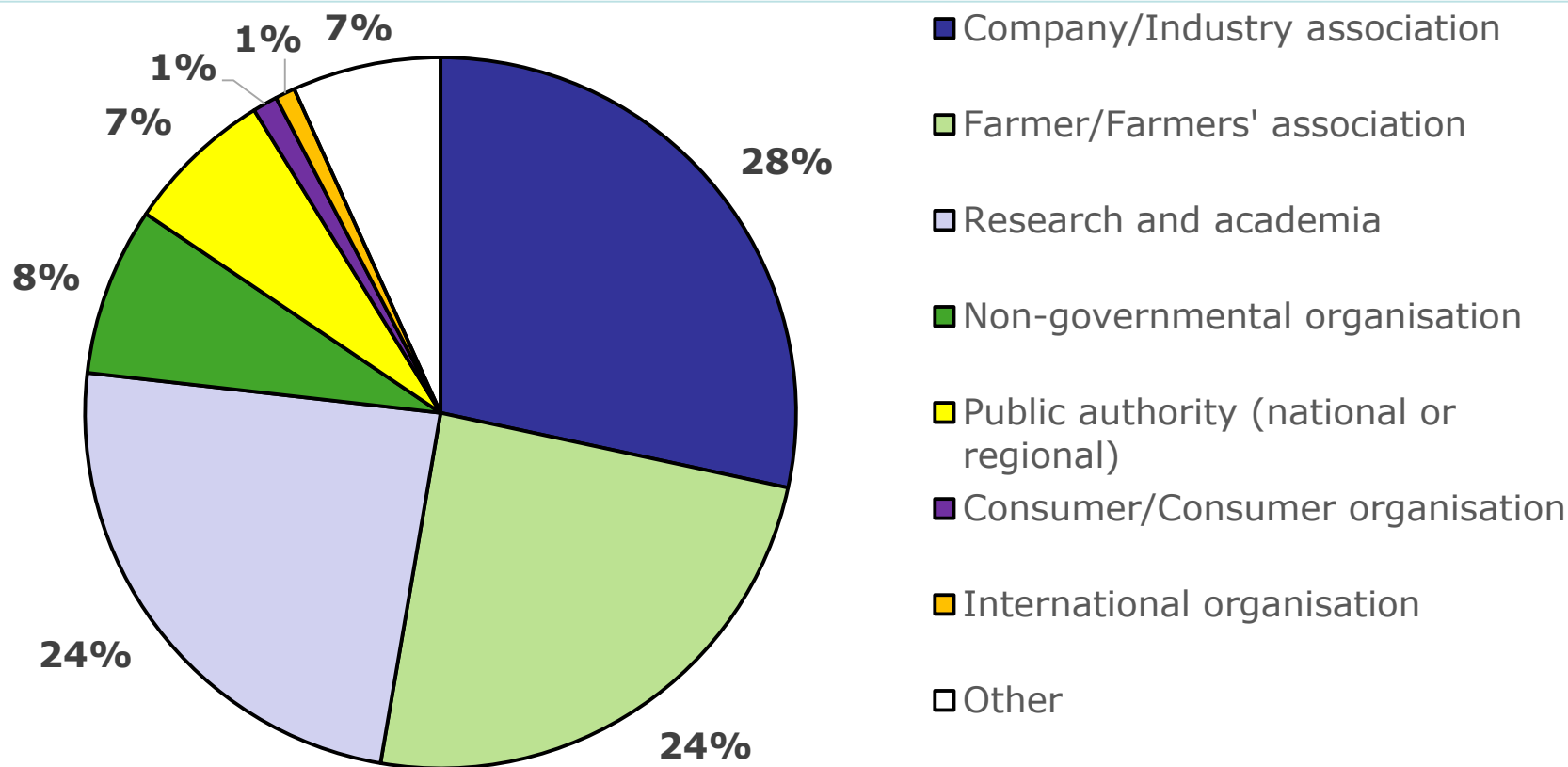
Responses from 26 MS

Most responses from France and Germany



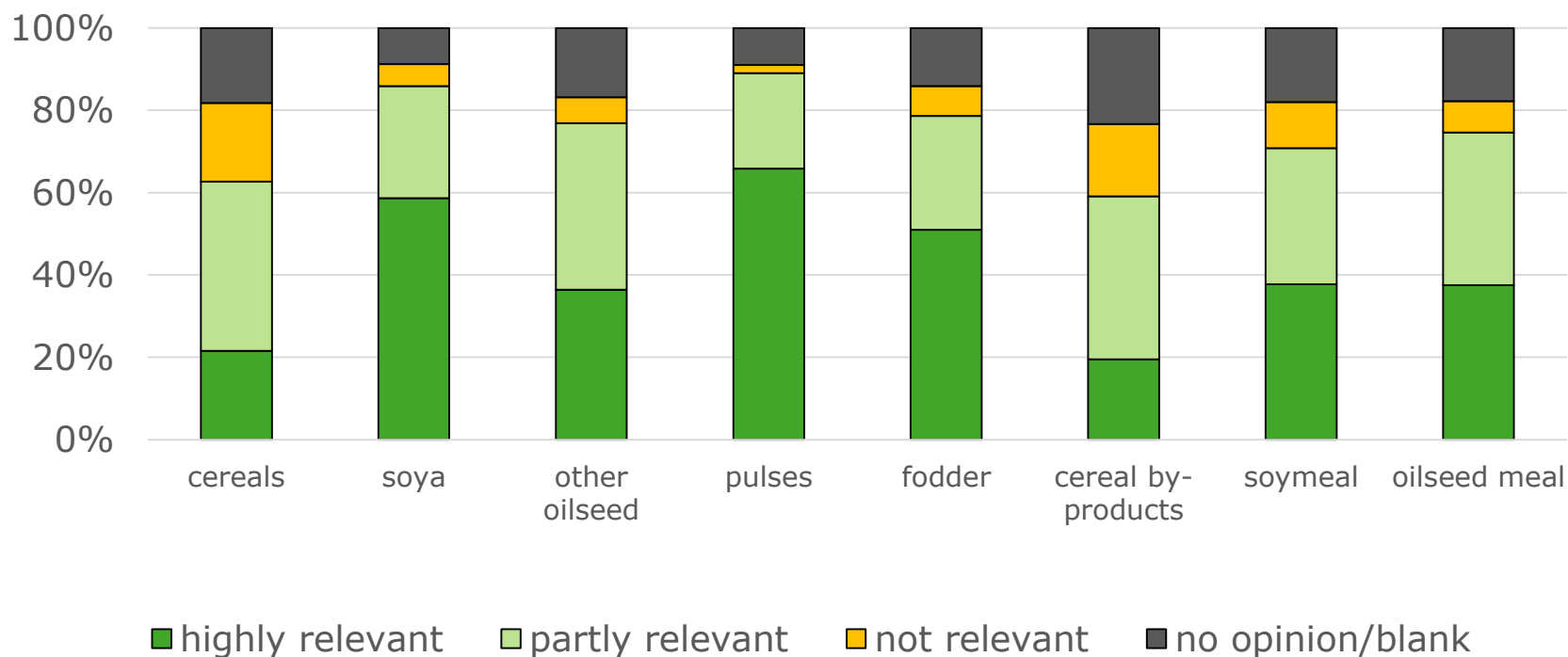
Responses by type of organisation

75% by companies, farmers and research



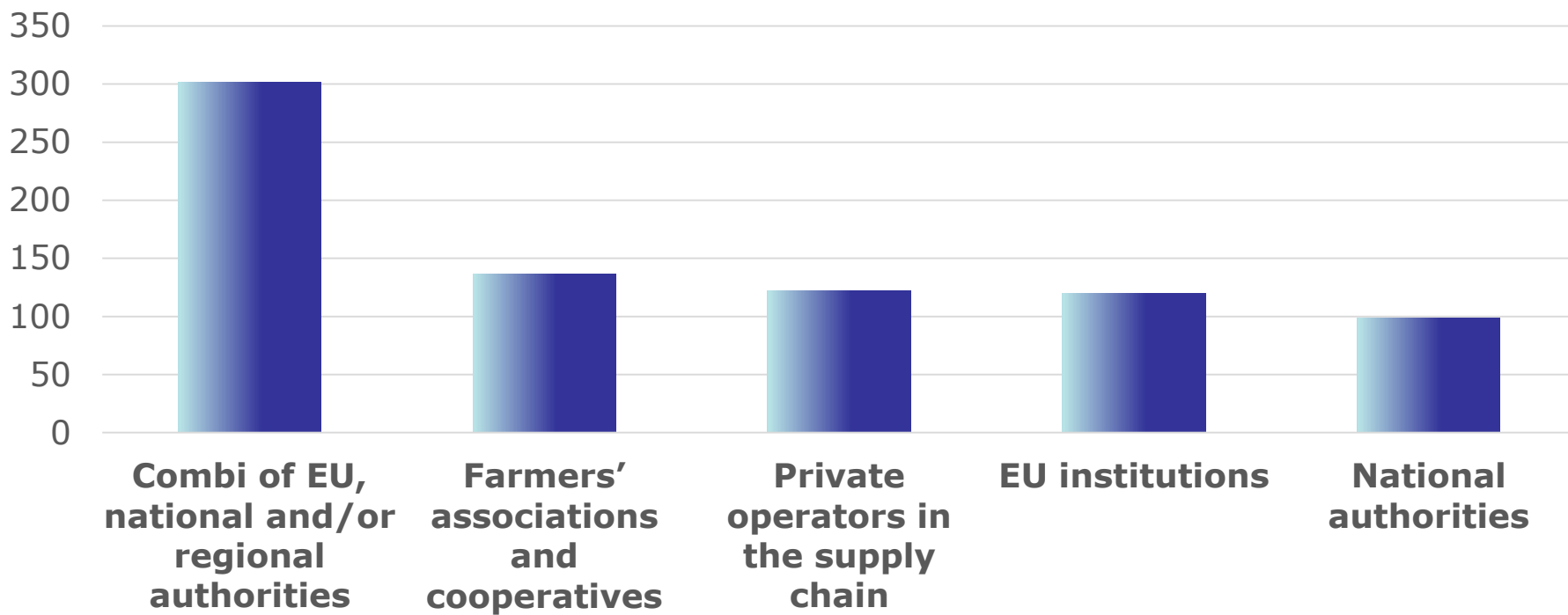
Sources of plant proteins

Soya, pulses and fodder most relevant



Actors for protein plan

Joint effort by authorities and sector



Priorities for protein plan

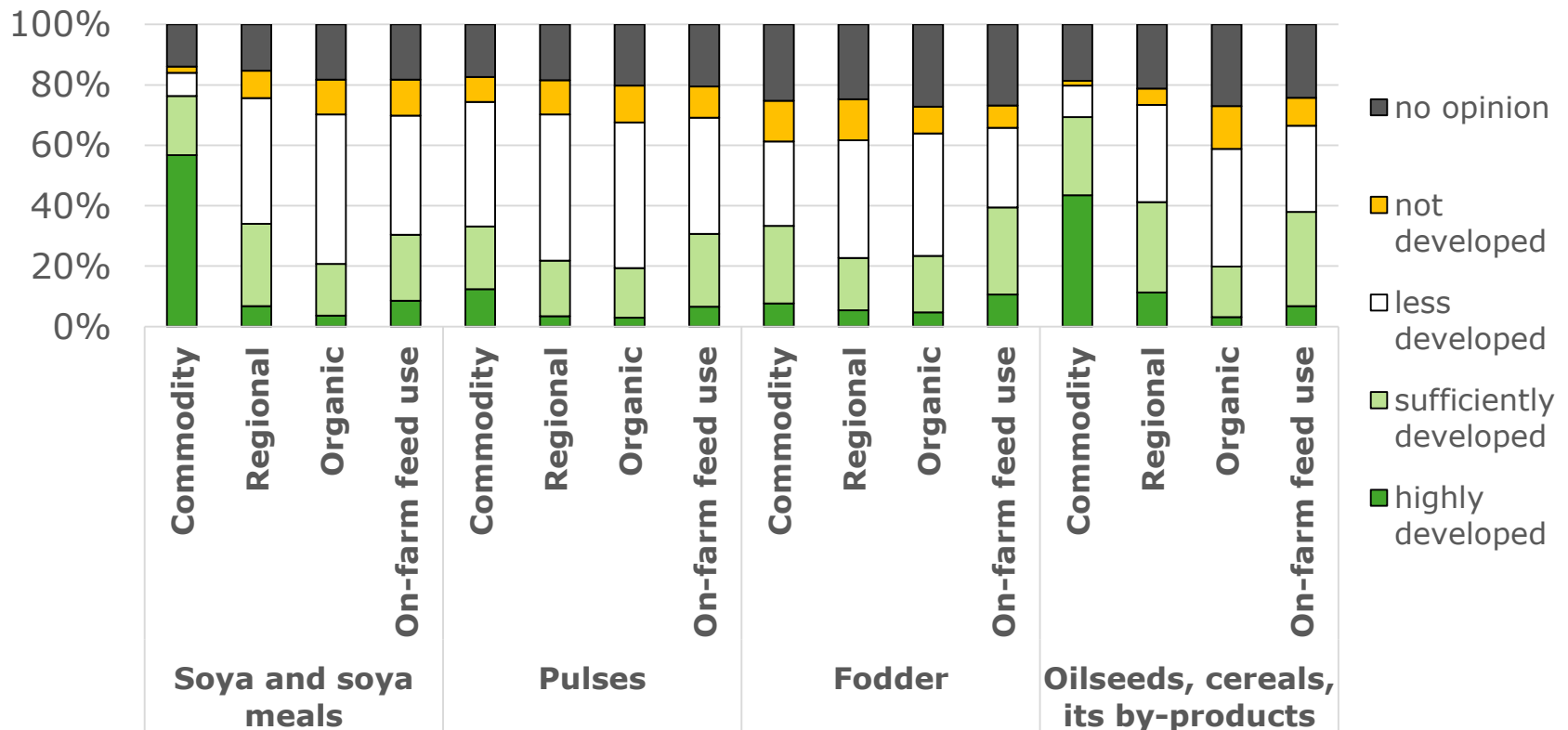
Highest priority: research and innovation

	Company/ Industry association	Farmer/ Farmers' association	Research & academia	NGO & Consumer Organisation	national or regional authority	Other	Total
Research and innovation	67%	69%	85%	51%	77%	67%	71%
Yield improvement	60%	67%	46%	58%	67%	47%	58%
Protein quality	64%	45%	52%	53%	57%	63%	55%
Profitability/price	59%	68%	37%	23%	43%	67%	52%
Agricultural practices	40%	57%	59%	63%	60%	63%	54%
Environmental benefits	41%	64%	56%	70%	53%	53%	55%
Food supply chain	25%	29%	42%	33%	40%	40%	33%
Feed supply chain	57%	32%	36%	49%	43%	30%	43%
Food market demand	16%	19%	21%	21%	7%	13%	18%
Feed market demand	25%	22%	12%	14%	13%	17%	19%

Feed supply chains

Commodity markets soya & oilseed most developed

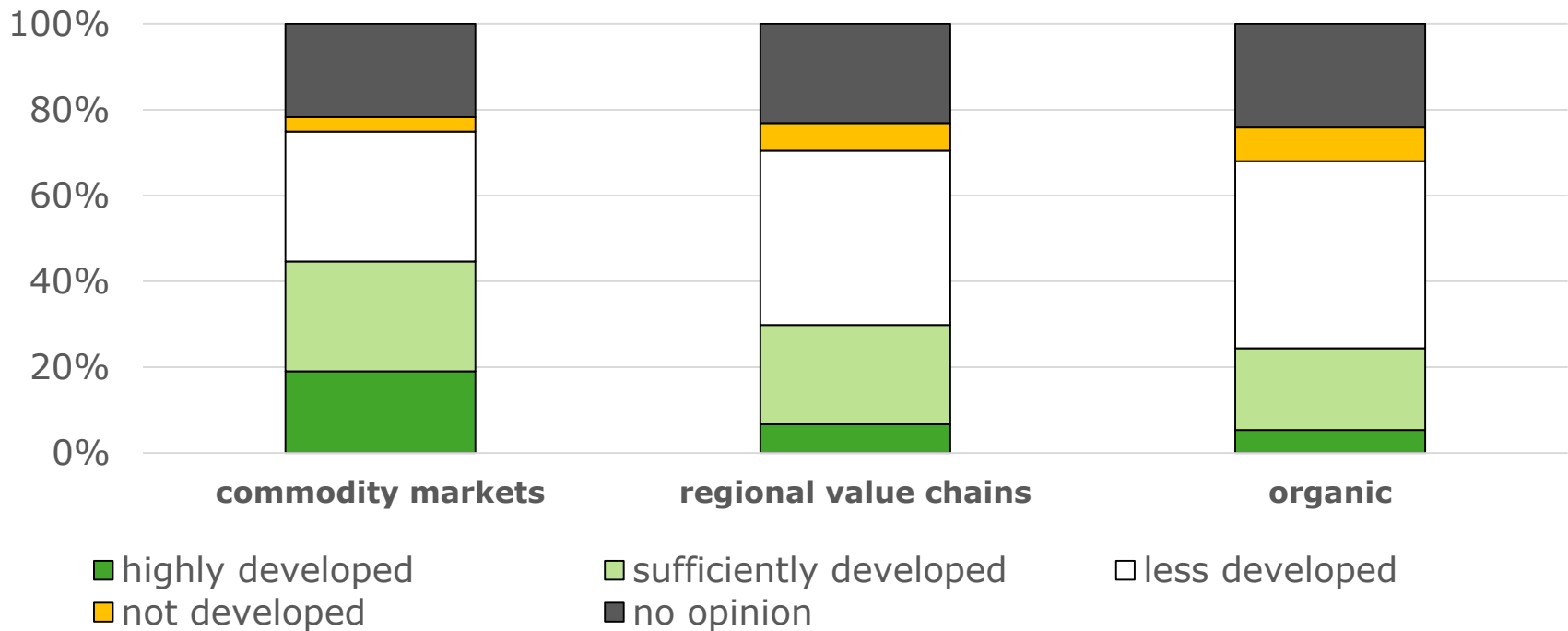
Organic least developed



Food supply chains

Needs further development in general

food supply chain





Research priorities

Breeding and sustainability first priorities

Research priorities

- Breeding (yield improvement)
- Breeding (nutrition)
- Environmental benefits
- Sustainable cropping (rotation)
- Use of pesticides / nutrients
- Breeding (better harvesting)
- Breeding (value chain)



Actions - Market Study

- Starting date on 1st March 2018
- Preliminary final report in 6 months (by end August 2018)
- Objectives:
 - To **quantify current supply and demand** for plant proteins in different markets segments
 - To qualify **future growth potential** in different market segments
- Analysis will include **different uses** (feed, food, others), **different supply sources** (crops, by-products), **different origins** (EU vs imported)



Actions - Thematic Workshops

1. Research and Innovation

- 24/25 April in Brussels

2. Agronomic practices and environmental benefits

- Possibly in a Member State – early June

3. Supply chains

- Possibly in a Member State – early July

4. Market Segments

- Linked to market study
- Possibly in a Member State in September

Workshop on Research and Innovation

24 April pm + 25 April am in Brussels
25-30 experts – 3 sessions on:

1. **Breeding and genetics** for improved production and resilience
2. Integration of protein crops in **cropping systems and agricultural landscapes**
3. Integration of plant proteins in **food and feed systems**

Workshop on "Research & Innovation in Plant Proteins"

Brussels, 24 & 25 April 2018

Venue: Rue Philippe Lebon 3, 1000 Brussels (Room 3.37)

AGENDA - DRAFT

Tuesday 24 April

14:00 – 14:30	Introduction	DG AGRI
14:30 – 15:30	Key-note presentation	
30 min	Research challenges for protein crops	D. Rubiales (CSIC)
30 min	Q & A	All participants
15:30 – 16:00	Coffee break	
16:00 – 18:00	Breeding and Genetics for improved production and resilience	
Session 1	(Rapporteur P. Annichiarico, CREA)	
20 min		B. Julier (INRA)
20 min		O. Sass (NPZ)
20 min		E. Muresanu (TURDA)
50 min	Q & A	All participants
10 min	Wrap up	P. Annichiarico
19:30 – 21:00	Networking dinner (self-pay)	

Wednesday 25 April

9:00 – 10:30	Integration of protein crops in cropping systems and agricultural landscapes	
Session 2	(Rapporteur D. Murphy-Bokern, Donau Soja)	
25 min		H-J Laue (Univ. Kiel)
25 min		D. Jozefiak (Univ. Poznan)
30 min	Q & A	All participants
10 min	Wrap up	D. Murphy-Bokern
10:30 – 11:00	Coffee break	
11:00 – 12:30	Integration of plant proteins in food and feed systems	
Session 3	(Rapporteur C. de Visser, WUR)	
25 min		M. Kumprecht (FEFAC)
25 min		M-B Magrini (INRA)
30 min	Q & A	All participants
10 min	Wrap up	C. de Visser
12:30 – 13:00	Conclusions	DG AGRI



Actions - Bilateral meetings

Member States

- 20 December: France
- 8-9 March: Italy
- 19-20 March: Denmark
- 16 April: Austria



Next steps

- Analysis of stakeholders **survey results** (April)
- Organisation of **2nd thematic workshop** on agronomic practices and environmental benefits (beginning of June) and **3rd thematic workshop** on supply chains (beginning of July)
- **Market study**: First interim report (mid of May)