



THE DEVELOPMENT OF PLANT PROTEINS IN THE EUROPEAN UNION

Farming and Supply Chain

23th November 2018 | CEO Reinhard WOLF



Overview



Wholesaler of 40 cooperatives



Active in 8 CEE countries



+2.7 billion turnover

BayWa

Strategic alliance with BayWa

Animal Feed



Farm Inputs



Energy



Agri-commodity Trade



Building Materials



RWA



All farm sizes

Cooperative supply chain

Supplying farmers with inputs

All farm sizes

Sourcing agri-output

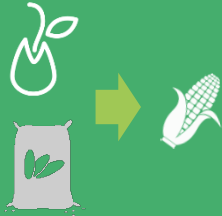
Agri-output processing



Plant breeding & seed production



Distribution of fertilizer and other inputs



Storage



Logistic



Risk-Hedging



Wholesale



Feed processing

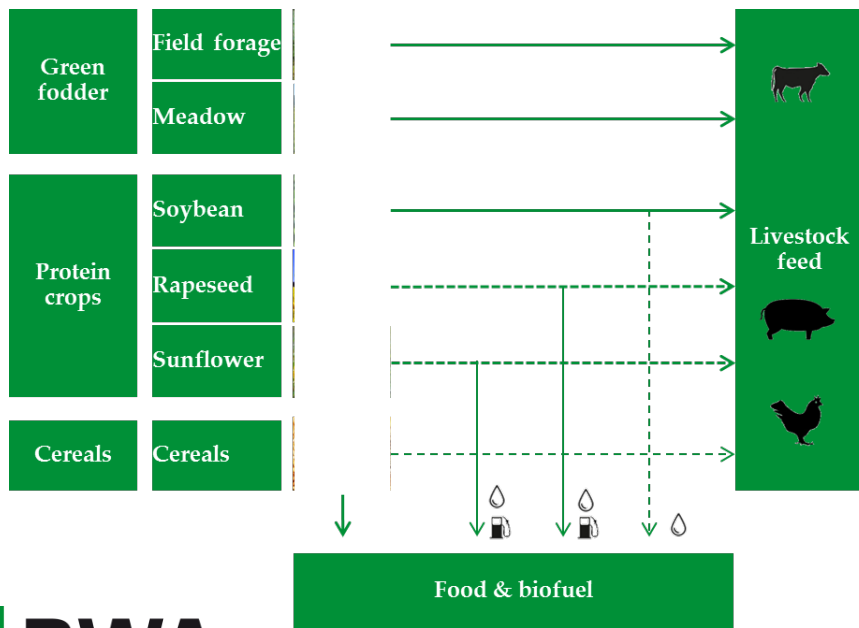


Food processing







Farming and Supply Chain

Protein demand is covered by green fodder, protein crops and cereals.



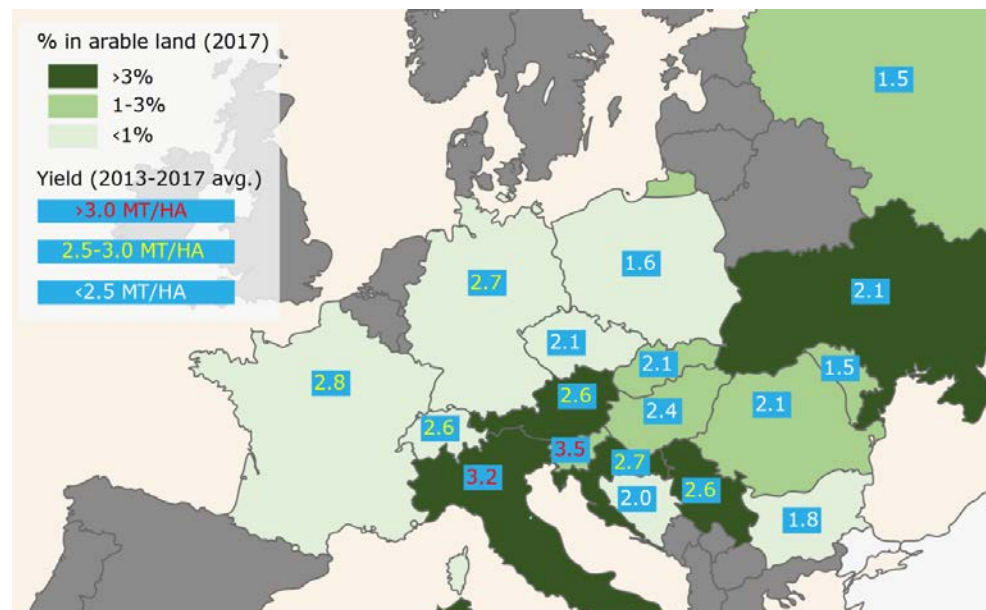
EU 28:

	Area [k ha]	Domestic use [Mio. t]	Production [Mio. t]
	961	17,4	2,7
	6749	24,8	22,00
	4300	9,5	10,5

 Soybean with the highest import need

Alternatives for non-soybean countries

	EU 28:	
	Area [k ha]	Production [Mio. t]
Field peas (France)	740	2,1
Field & broad bean (North Europe, Baltic region)	620	1,9
Lupine (Germany)	260	0,4



Soybean yield in t/ha

Farming and Supply Chain – Opportunities

Regional protein production proofed to generate added financial and sustainable value for farmers



Positive effects
on crop rotation



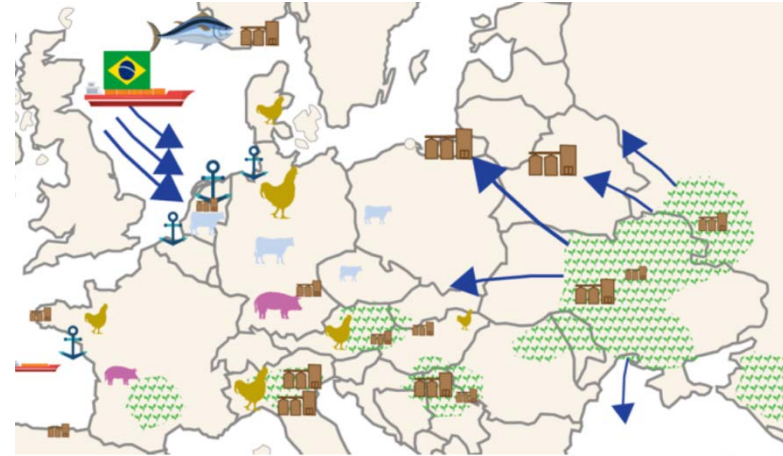
Competitive contribution
margin per ha



Regional labels
provide added value

Farming and Supply Chain - Aspects

- ECJ decision on NBT varieties – need to create new regulation
- Ensure increase of efficiency in plant production
- Support regional labels
- Consideration of positive effects using regional resources in CAP
- Increase the use of sustainable biofuel share



Various factors shall be respected in order to further develop European protein production

European Court of Justice (ECJ) decision on New Breeding Technologies (NBT) varieties

– prevent competitive disadvantage after latest ECJ decision



- New regulations required to enable farmers use of NBT-bred plants
- Establishing a registration procedure for NBT-imports
- Need to balance potential disadvantage from insufficient regulations



Ensure increase of efficiency in plant production

Plant breeding progress

- Yield potential
- Climate resistance

Advanced rhizobia impact

- Coating

Ensure existing and research for new active substances for plant protection

Facilitate regional labels

for livestock production and streamline system cost

Utilise synergy potentials in certifying and surveying

- One face to the farmer (one stop shop)
e.g. AMA / AMA-Marketing / DonauSoja



Use latest technology as satellite imagery

- Increase quality of controls
- Reduce effort and cost



Support regional labelling

- Strengthen public opinion
- Collaborate with retailers
- Support media and relevant stakeholders

Consideration of positive effects using regional resources in upcoming CAP

- Extending N-fixing potential by supporting legumes alternatively to soybean as:
 - Lupine
 - Peas
 - Field bean
 - Lucerne

- Less GHG-emission by usage of regional feed-compounds

Soya area development in Europe - F'cast to 2025



Increase the use of sustainable biofuel share in order to rebalance the plant protein deficit on top of RED II

- Rise of the biofuel share in the European transport sector
- Elimination of biodiesel would result in an income loss of 300 €/ha
- Promotion campaigns need to be carried out in order to raise awareness

Wish for an European consensus



Financial backing

- Accelerate research
 - Yield
 - Climate adoptability
- Foster regional protein production in next CAP



Information & communication

- Farmer's opportunities
- Support labelling
- Foster biofuel



Legal framework

- Ensure opportunity to access NBT
- Ensure food security (import)