



Towards the establishment of a "EU Protein Balance sheet"

CDG on COP

Brussels, 7th March 2017

Objective

**A comprehensive (and "official") overview of
EU supply and demand situation
for feed proteins**

Note: useful in the context of the EU "protein deficit"
and of further market transparency

Scope

Supply: exhaustive list of feed protein sources
(sub-divided into three main categories:

- Crops (cereals, oilseeds, pulses)
- Co-products (protein-rich materials like meals)
- Others (animal proteins)

Demand: focus on feed uses of proteins,
incl. quantification in crude protein and % of EU origin

Note: data mainly based on EU Commission sources
but stakeholders' input welcome (eg protein content)

Timelines

- **November 2016:** first "technical" meeting with stakeholders focused on methodology (format and sources for draft EU protein balance sheet)
- **Q1-2017:** draft EU protein balance sheet (and draft cover note) discussed with stakeholders (incl. CDG of 7th March)
- **April 2017:** publication on DG AGRI website of first EU protein balance sheet (MY 2015/16)

On-going work (see working documents)

| 2015/16 | Million tonnes | | | | | | Million tonnes (crude protein) | | | |
|--|-------------------------|----------------|----------------|---------------------------|-----------------------|------------------------|--------------------------------|-----------------------------------|------------------------------------|-----------------------------------|
| Protein source | Total EU production (A) | EU imports (B) | EU exports (C) | EU Total Domestic Use (D) | EU total feed use (E) | Feed use EU origin (F) | protein content (Feed use) (G) | EU total feed use (H) = (E) - (G) | Feed use EU origin (I) = (F) - (G) | % Feed Use of EU Origin (I) / (H) |
| CROPS | | | | | 179.0 | 162.4 | | 18.22 | 16.73 | 92% |
| CEREALS (of which) | 311.6 | 20.5 | 50.8 | 281.4 | 174.4 | 157.7 | | 17.07 | 15.59 | 91% |
| Common Wheat | 151.3 | 4.1 | 32.7 | 119.0 | 55.8 | 51.7 | 11.0% | 6.14 | 5.69 | |
| Durum Wheat | 8.3 | 2.5 | 1.2 | 8.8 | 0.3 | 0.3 | 12.0% | 0.04 | 0.03 | |
| Barley | 61.4 | 0.3 | 14.2 | 48.1 | 36.3 | 36.3 | 10.0% | 3.63 | 3.63 | |
| Grain Maize | 59.1 | 13.3 | 2.2 | 73.8 | 58.5 | 46.8 | 8.0% | 4.68 | 3.75 | |
| Rye | 7.6 | 0.0 | 0.2 | 7.9 | 3.0 | 2.9 | 11.0% | 0.33 | 0.32 | |
| Sorghum | 0.6 | 0.1 | 0.0 | 0.9 | 0.7 | 0.5 | 11.0% | 0.08 | 0.05 | |
| Oats | 7.5 | 0.0 | 0.2 | 6.9 | 5.2 | 5.2 | 11.0% | 0.57 | 0.57 | |
| Triticale | 12.6 | 0.0 | 0.0 | 12.3 | 11.0 | 11.0 | 11.0% | 1.21 | 1.21 | |
| Other cereals | 3.2 | 0.2 | 0.0 | 3.8 | 3.6 | 3.0 | 11.0% | 0.40 | 0.34 | |
| OILSEEDS (feed use without crushing) (columns (E) and (F)) | 32.0 | 18.6 | 0.9 | 49.8 | 1.2 | 1.2 | | 0.32 | 0.32 | 100% |
| Soybeans | 2.3 | 14.6 | 0.1 | 16.8 | 0.8 | 0.8 | 31.6% | 0.25 | 0.25 | |
| rapeseed | 21.8 | 3.5 | 0.3 | 24.9 | 0.3 | 0.3 | 18.8% | 0.06 | 0.06 | |
| Sunflowerseed | 7.9 | 0.5 | 0.4 | 8.0 | 0.1 | 0.1 | 15.4% | 0.02 | 0.02 | |
| PULSES (of which) | 4.4 | 0.7 | 0.9 | 4.2 | 3.4 | 3.4 | | 0.82 | 0.82 | 100% |
| Field Peas | 2.1 | 0.3 | 0.4 | 2.0 | 1.6 | 1.6 | 22.5% | 0.36 | 0.36 | |
| Broad beans | 2.0 | 0.3 | 0.4 | 1.9 | 1.5 | 1.5 | 26.0% | 0.40 | 0.40 | |
| Lupins | 0.4 | 0.1 | 0.1 | 0.4 | 0.3 | 0.3 | 22.5% | 0.07 | 0.07 | |
| CO-PRODUCTS | | | | | 83.9 | 44.6 | | 25.81 | 9.69 | 38% |
| SOYBEAN MEALS (of which) | | | | | 31.2 | 1.5 | | 14.3 | 0.6 | 4% |
| Soybean meal (from EU soybean production) | 1.5 | | | | 1.5 | 1.5 | 40.0% | 0.60 | 0.60 | |
| Soybean meal (imported soybeans crushing) | 10.1 | | | | 9.9 | 0.0 | 47.0% | 4.63 | 0.00 | |
| Soybean meal (traded as such) | | 19.8 | 0.3 | | 19.5 | 0.0 | 45.5% | 8.89 | 0.00 | |
| Soybean Protein Concentrate | 0.3 | | | | 0.3 | 0.0 | 62.5% | 0.19 | 0.02 | |
| RAPSEED MEALS (of which) | | | | | 13.8 | 11.8 | | 4.5 | 3.9 | 86% |
| Rapeseed meal (from EU rapeseed production) | 11.8 | | | | 11.8 | 11.8 | 33.0% | 3.90 | 3.90 | |
| Rapeseed meal (imported rapeseed crushing) | 1.9 | | | | 1.9 | 0.0 | 33.0% | 0.64 | 0.00 | |
| Rapeseed meal (traded as such) | | 0.4 | 0.5 | | 0.0 | 0.0 | 33.0% | 0.00 | 0.00 | |
| SUNFLOWER MEALS (of which) | | | | | 6.8 | 3.6 | | 2.1 | 1.0 | 47% |
| Sunflower meal (from EU sunflowerseed production) | 3.6 | | | | 3.6 | 3.6 | 28.0% | 1.01 | 1.01 | |
| Sunflower meal (imported sunflowerseed crushing) | 0.2 | | | | 0.2 | 0.0 | 35.0% | 0.08 | 0.00 | |
| Sunflower meal (traded as such) | | 3.2 | 0.2 | | 3.0 | 0.0 | 35.0% | 1.05 | 0.00 | |
| OTHERS (excluding on-farm use) of which | | | | | 32.1 | 27.6 | | 4.8 | 4.2 | 86% |
| Palmkern meal | 0.0 | 2.3 | 0.0 | 2.3 | 2.3 | 0.0 | 16.0% | 0.36 | 0.00 | |
| Other oilseed meals | 0.6 | 0.0 | 0.0 | 0.6 | 0.6 | 0.6 | 37.0% | 0.23 | 0.23 | |
| Corn Germ meal | 0.4 | 0.0 | 0.0 | 0.4 | 0.4 | 0.4 | 26.0% | 0.10 | 0.10 | |
| Corn Gluten Meal | | | | | 0.1 | 0.1 | 60.0% | 0.06 | 0.06 | |
| Corn Gluten Feed | 2.8 | 0.3 | 0.1 | 2.9 | 2.9 | 2.8 | 19.0% | 0.55 | 0.52 | |
| Distillers Dried Grains with Solubles | 3.4 | 0.6 | 0.2 | 3.8 | 3.8 | 3.4 | 30% for wheat 27% for corn | 1.1 | 1.0 | |
| Wet Distillers Grain | | | | | n.a. | n.a. | | | | |
| Wheat bran | 8.3 | 0.0 | 0.0 | 8.3 | 8.3 | 8.3 | 15.5% | 1.29 | 1.29 | |
| Wheat gluten feed | | | | | 0.4 | 0.4 | | 0.00 | 0.00 | |
| Citrus pulp | 0.0 | 0.5 | 0.0 | 0.5 | 0.5 | 0.0 | 7.5% | 0.04 | 0.00 | |
| Beet pulp pellets | 4.5 | 0.8 | 0.1 | 5.1 | 5.1 | 4.5 | 7.5% | 0.39 | 0.33 | |
| Molasses | 5.0 | 1.1 | 0.1 | 6.0 | 2.4 | 2.0 | 10.5% beet 4% cane | 0.23 | 0.21 | |
| Processed Proteins (potatoes) | | | | | 0.2 | 0.2 | 12.0% | 0.02 | 0.02 | |
| Dried Fodder | 4.0 | | | | n.a. | n.a. | 16.0% | | | |
| Former Foodstuff | | | | | 5.0 | 5.0 | 8.8% | 0.44 | 0.44 | |
| OTHER SOURCES | | | | | 2.2 | 2.1 | | 0.84 | 0.75 | 90% |
| (excluding on-farm use) | | | | | | | | | | |
| Processed Animal Proteins | | | | | 0.6 | 0.6 | 58% for pork 63% for | 0.36 | 0.36 | |
| Fish Meal | 0.4 | 0.4 | 0.2 | 0.5 | 0.5 | 0.4 | 65.0% | 0.34 | 0.25 | |
| Whey Powder | | | | | 0.9 | 0.9 | 12.5% | 0.11 | 0.11 | |
| Skimmed Milk Powder | | | | | 0.2 | 0.2 | 12.5% | 0.02 | 0.02 | |

Comments welcome at agri-G4@ec.europa.eu



Thank you for your attention!

**Arable Crops Balance sheets
available at:**

http://ec.europa.eu/agriculture/cereals/index_en.htm