



Towards the establishment of a "EU Protein Balance sheet"

Civil Dialogue Group Beef Meat

Brussels, 6th April 2017

Objective

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

(hopefully) useful initiative in the context of the
"EU protein deficit" and further market transparency

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 Arable Crops on 7 March and CDG Pig Meat on 28 March) and with MS (CMO Committee on 30 March)
- **April 2017:** publication on DG AGRI website of first EU protein balance sheet (MY 2015/16)

Scope

Supply: exhaustive list of feed protein sources,
sub-divided into 3 main categories:

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

Demand: focus on feed uses of proteins,
incl. quantification of % EU origin (EU self-sufficiency)

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

Structure

Rows: exhaustive list of 44 feed protein sources
sub-divided into **3 main categories:**

1. Crops (15 entries)
2. Co-products (25 entries)
3. Others (4 entries)

Columns: for each protein source, quantities (tonnes)
for EU production, trade, total use, feed use then
**conversion into crude protein and quantification
of % feed use of EU origin (EU self-sufficiency)**

+ Explanatory cover note

Final Draft (see working doc.)

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 (J) / (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	1.5	40.0%	0.60	0.60	
	Soybean meal (imported soybeans crushing)	10.1			9.9	0.0	0.0	47.0%	4.63	0.00	
	Soybean meal (traded as such)		19.8	0.3	19.5	0.0	0.0	45.5%	8.89	0.00	
	Soybean Protein Concentrate	0.3			0.3	0.0	0.0	62.5%	0.19	0.02	
RAPESEED MEALS (of which)						13.8	11.8		4.5	3.9	86%
	Rapeseed meal (from EU rapeseed production)	11.8			11.8	11.8	11.8	33.0%	3.90	3.90	
	Rapeseed meal (imported rapeseed crushing)	1.9			1.9	0.0	0.0	33.0%	0.64	0.00	
	Rapeseed meal (traded as such)		0.4	0.5	0.0	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	3.6	28.0%	1.01	1.01	
	Sunflower meal (imported sunflowerseed crushing)	0.2			0.2	0.0	0.0	35.0%	0.08	0.00	
	Sunflower meal (traded as such)		3.2	0.2	3.0	0.0	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	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.	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	0.4	7.5%	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	0.2	12.0%	0.02	0.02	
	Dried Fodder	4.0			n.a.	n.a.	n.a.	16.0%			
	Former Foodstuff				5.0	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

First Results

1. Crops Feed Use:

- 18.23 million tonnes of crude protein
- 92% EU origin

2. Co-products Feed Use:

- 25.87 million tonnes of crude protein
- 38% EU origin

3. Others Feed Use:

- 0.87 million tonnes of crude protein
- 90% EU origin



Thank you for your attention!

**Arable Crops Balance sheets
available at:**

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