



# **EU Protein Balance sheet & EU Protein Plan**

## **Civil Dialogue Group Milk**

### **Brussels, 20<sup>th</sup> February 2018**

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- **Update on EU Protein Balance Sheet**
- **Update on EU Protein Plan**

## Reminder: objectives

### EU protein balance sheet:

a comprehensive overview of EU supply and demand situation for feed proteins

**Supply:** exhaustive list of feed protein sources (not only protein-rich materials)

**Demand:** focus on feed uses of proteins

**Quantification of EU protein self-sufficiency** (or deficit) – monitoring tool for further policy-making

## Reminder: Timelines

- **April 2017:** publication of first EU protein balance sheet for MY 2015/16 (+ explanatory note)
- **July 2017:** publication of further versions of EU Protein Balance Sheets since MY 2011/12
- **October 2017:** publication of latest EU protein balance sheet for MY 2016/17

# Publication on Crops MO website

[https://ec.europa.eu/agriculture/market-observatory/crops\\_en](https://ec.europa.eu/agriculture/market-observatory/crops_en)



The top part of the image shows an Excel spreadsheet titled 'EU Protein Balance Sheet 2016/17'. A red circle highlights the year '2016/17' in the top-left corner of the data table. The table includes columns for 'Protein source', 'Total EU production (A)', 'EU imports (B)', 'EU exports (C)', 'EU Feed domestic use (D)', 'EU total feed use (E)', 'Feed use EU origin (F)', 'protein content (Feed use) (G)', 'EU total feed use (H)', 'Feed use of EU origin (I)', and '% Feed use of EU origin (I) / (H)'. The 'CROPS' section is expanded to show various crops like Cereals, Oilseeds, and Pulses.

The bottom part of the image shows a presentation slide titled 'EU Protein Balance Sheet'. A red circle highlights the text 'Explanatory note' on the slide.

• Objective

The EU Protein Balance Sheet (PBS) aims to provide a comprehensive overview of the supply and demand situation for protein used for food purposes in the EU.

## First Results – MY 2011/12 to 2016/17

**Total feed demand  $\approx$  45 Mio tonnes** crude protein

- 1. Proteins from Crops** (eg cereals):  
 $\approx$  **18 Mio tonnes** crude protein (**40%**)  
**Self-sufficiency: high**,  $\approx$ 92% EU origin
- 2. Proteins from Co-products** (eg oilseed meals):  
 $\approx$  **26 Mio tonnes** crude protein (**60%**)  
**Self-sufficiency: low**, from 37% EU origin in 2011/12 to 42 % in 2014/15

## Reminder: (still) open questions

### Some limitations related to data gaps about:

- Proteins from forage sources (not included)
- Protein content per source (average values used)
- On-farm feed uses (estimated)
- Stocks (not included)

**No "grand total"** (limited protein inter-changeability)

**Stakeholders input welcome to answer (still) open questions** eg on supply from forage sources: estimated consumption x estimated protein content?

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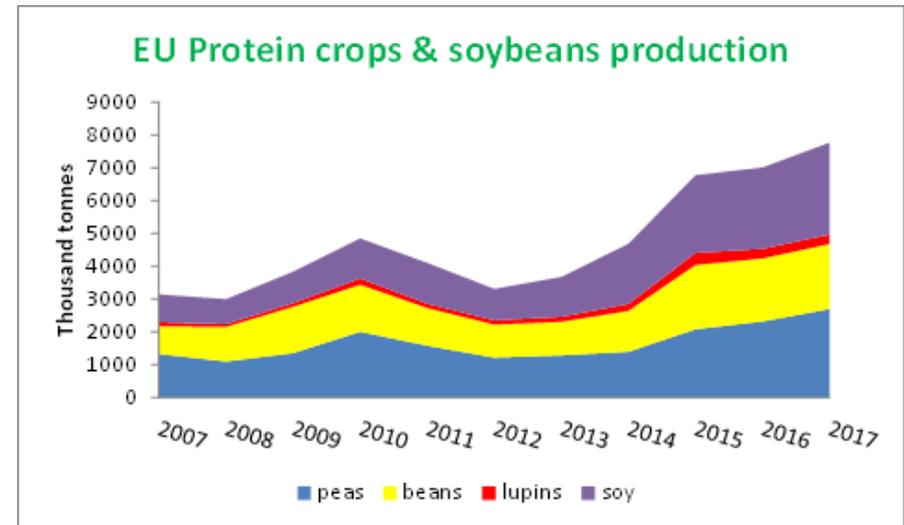
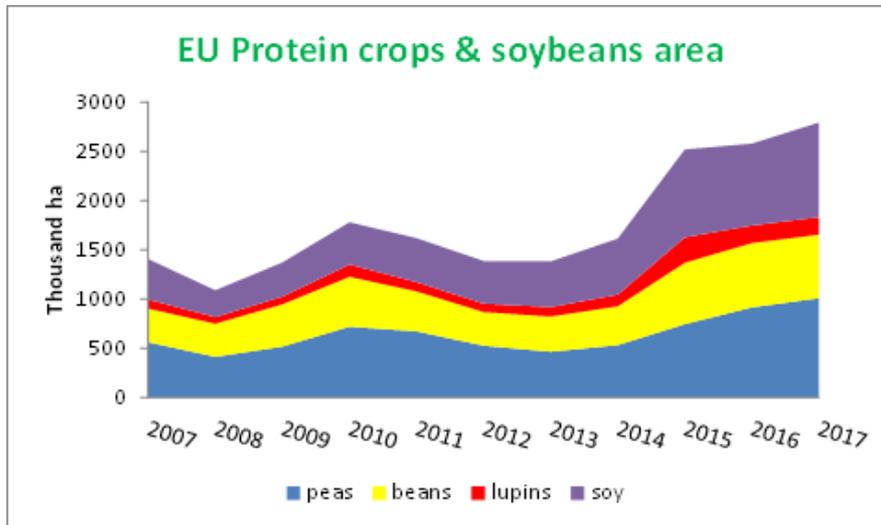
- **Update on EU Protein Balance Sheet**
- **Update on EU Protein Plan**

## Context

- Regular **stakeholders** discussions on "plant proteins" (e.g. FEFAC Conference June 2017)
- **EP** own initiative report on plant proteins (MEP Denanot) – vote in COMAGRI on 21.02.2018
- **Council** discussions on EU Soya Declaration mid-2017 and on EU Protein Plan on 19.02.2018

# 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**



## **EU Protein Deficit still significant – see soya example**

**A relevant example: soya  $\approx 1/3$  of total feed protein supply** (15 million tonnes of crude protein)

Soya bean imports (duty-free):  $\approx 14$  million tonnes

Soya meal imports (duty-free):  $\approx 19$  million tonnes of meals i.e. equivalent to  $\approx 28$  million tonnes of soya beans

**Total soya imports  $\approx 42$  million tonnes**  
(soya beans equivalent)

**EU soya bean production:  $< 3$  million tonnes**

**Soya: EU self-sufficiency  $\approx 5\%$**

# Timelines

- 1. Q1+Q2-2018:** fact-finding phase, leading to "state-of-the art" on EU plant protein production
- 2. Q3-2018:** preparation of draft Commission report (based on outcome/analysis of fact-finding phase)
- 3. Q4-2018:** presentation and **publication of Commission report on "A Protein Plan for Europe"** (including organisation of EU conference on plant proteins)

## Fact-finding phase: main steps

- 1. Stakeholders survey (Q1-2018): launched on 19.02.2018 till 23.03.2018** e-questionnaire about plant protein production (incl. questions on policy, research, markets)  
<https://ec.europa.eu/eusurvey/runner/ProteinPlanForEurope>
- 2. Market study (Q1+Q2-2018):** quantify market demand for EU plant proteins (current and potential future) in different market segments
- 3. Bilateral meetings (Q1+Q2-2018):** to discuss current situation and future needs with Member States authorities and with stakeholders
- 4. Thematic workshops (Q2-2018):** experts to discuss current situation and future needs – four thematic workshops planned on research, agronomic practices, supply chain, market demand – first workshop on research on 24-25 April

# Cooperation with Stakeholders

**Stakeholders survey:** further to input on questionnaire, participation to on-going e-survey highly welcome - <https://ec.europa.eu/eusurvey/runner/ProteinPlanForEurope>

**Bilateral meetings:** in addition to "multilateral" meetings (eg CDG), bilateral meetings with stakeholders always welcome

**Events participation:** stakeholders experts welcome to attend Commission events like the four "thematic" expert workshops planned in Q2-2018

**Comments:** input from stakeholders always welcome at [agri-G4@ec.europa.eu](mailto:agri-G4@ec.europa.eu)



**Thank you for your attention!**

**Arable Crops (incl. protein crops) data  
available at:**

**[https://ec.europa.eu/agriculture/market-observatory/crops\\_en](https://ec.europa.eu/agriculture/market-observatory/crops_en)**