



EU Protein Balance sheet & EU Protein Plan

Civil Dialogue Group Milk

Brussels, 20th 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/legals_en
EU Protein Balance Sheet 2015-17 (Final Only) (Compatibility Mode) - Microsoft Excel

https://ec.europa.eu/agriculture/market-observatory/legals_en
EU Protein Balance Sheet 2015-17 (Final Only) (Compatibility Mode) - Microsoft Excel

2016/17										
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 * 0.8) (H)	Feed use of EU origin (I = F * 0.8) (I)	% Feed use of EU origin (I / H)
CROPS					177.6	159.2		18.30	16.80	91%
CEREALS (of which)	204.2	19.4	38.1	181.3	172.9	154.6		17.03	15.39	90%
Common Wheat	133.7	3.3	25.1	115.7	52.4	49.1	11.0%	5.76	5.40	
Durum Wheat	9.2	1.7	1.4	9.4	0.8	0.8	10.0%	0.10	0.09	
Barny	59.0	0.4	8.8	52.8	41.2	41.2	10.0%	4.12	4.12	
Grain Maize	60.8	13.6	2.0	69.5	52.8	40.5	8.0%	4.22	3.24	
Rye	7.3	0.0	0.1	7.4	2.3	2.3	11.0%	0.25	0.25	
Sorghum	0.7	0.2	0.0	0.9	0.7	0.5	11.0%	0.08	0.06	
Oats	7.9	0.0	0.2	9.0	7.3	6.4	11.0%	0.80	0.71	
Triticale	11.5	0.0	0.0	12.1	11.0	10.5	11.0%	1.21	1.16	
Other cereals	3.4	0.2	0.0	4.7	4.5	3.3	11.0%	0.50	0.36	
OILSEEDS (feed use without crushing)	31.0	19.5	0.9	49.8	1.8	1.8		0.50	0.50	100%
(columns (E) and (F) Supplies)	2.5	14.0	0.2	16.4	1.2	1.2	33.0%	0.40	0.40	
rapeseed	20.1	4.7	0.3	24.6	0.5	0.5	18.0%	0.08	0.08	
Sunflowerseed	8.5	0.8	0.4	8.8	0.2	0.2	10.4%	0.02	0.02	
PULSES (of which)	4.4	0.3	1.1	3.6	3.0	2.8		0.77	0.71	93%
Field Peas	2.3	0.1	0.7	1.7	1.3	1.3	22.0%	0.29	0.29	
Broad beans	1.9	0.0	0.4	1.5	1.3	1.3	26.0%	0.33	0.33	
Lupins	0.3	0.1	0.0	0.4	0.4	0.3	35.0%	0.15	0.10	
CO-PRODUCTS					84.1	44.6		25.57	9.77	38%
SOYBEAN MEALS (of which)					29.4	1.6		13.4	0.7	5%

EU Protein Balance Sheet

Explanatory note

Objective

The EU Protein Balance Sheet (PBS) aims to provide a comprehensive overview of the supply and demand situation for protein used for feed 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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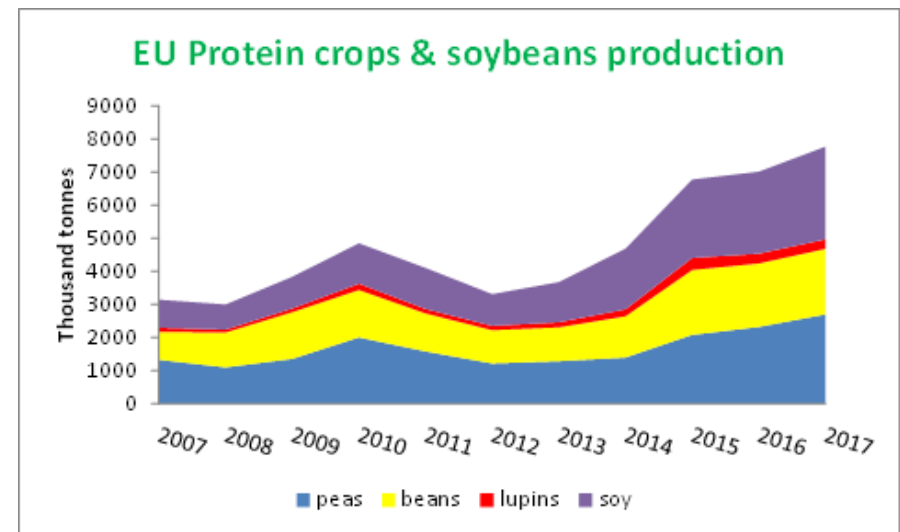
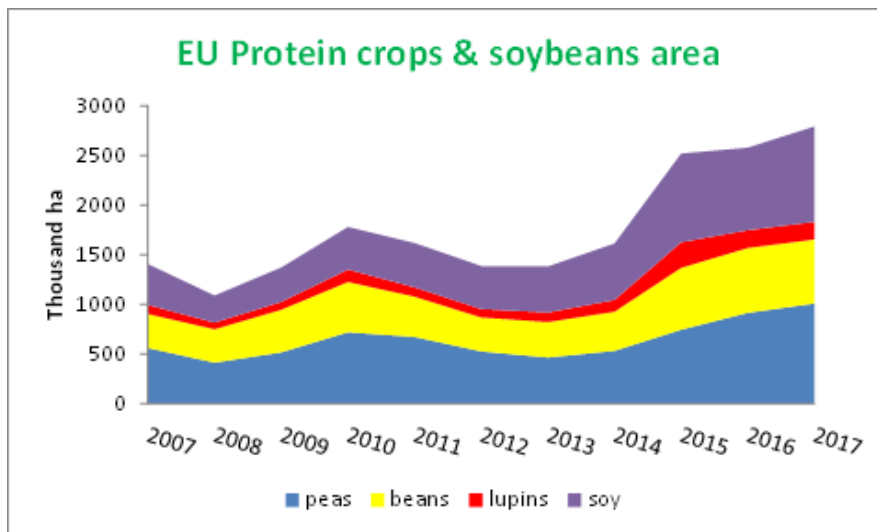
- **Update on EU Protein Balance Sheet**
- **Update on EU Protein Plan**

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): ≈ 14 million tonnes

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

Total soya imports ≈ 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



Thank you for your attention!

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

https://ec.europa.eu/agriculture/market-observatory/crops_en