

Development of EU plant proteins state of play

Civil Dialog Group - Milk

5 March 2020

Commission report on plant proteins identifies three main market segments

Conventional compound feed

largest
market,
smallest
potential

Premium feed

strong growth
rates in some
MS

Food

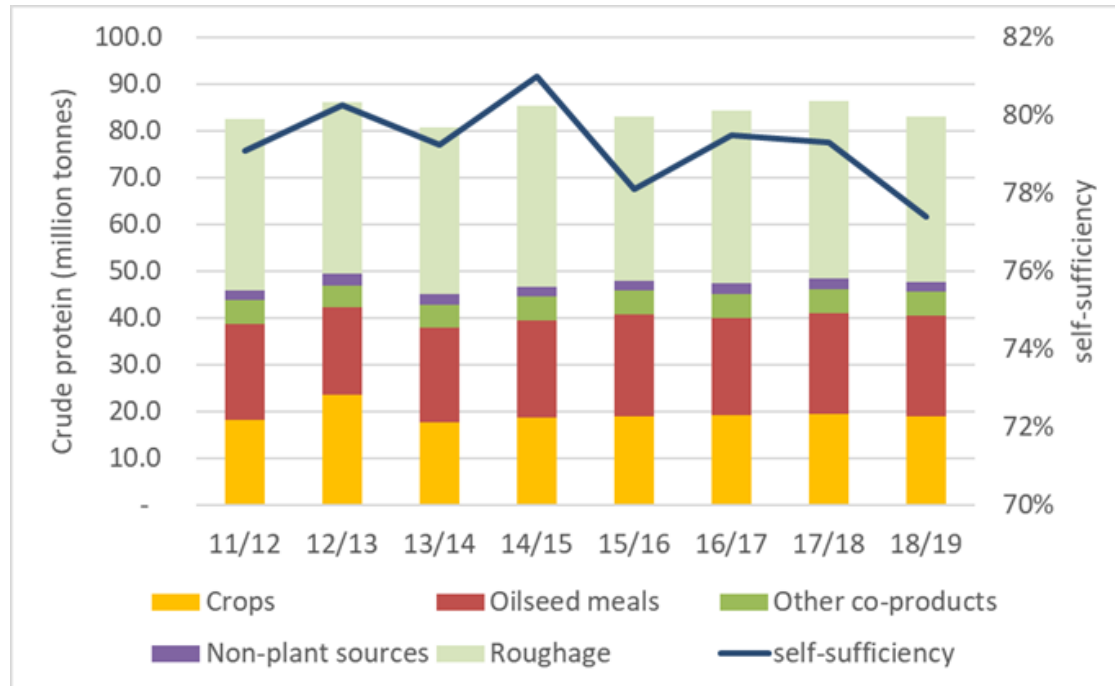
good profit
margins but
niche market

Main drivers for future development of EU-grown plant proteins

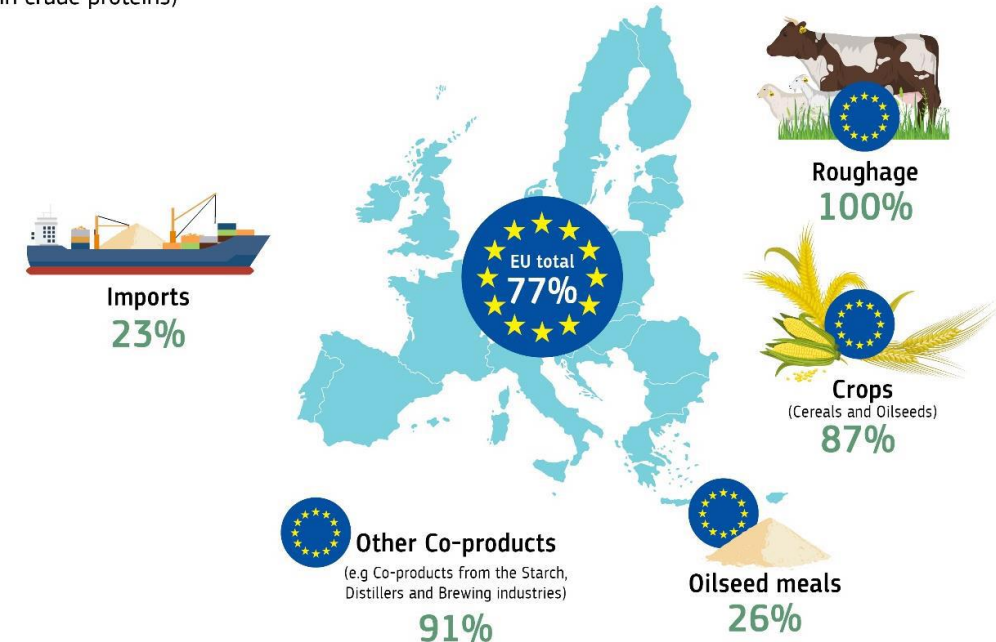
- Relative competitiveness versus other crops and non-EU plant proteins
- Supply chain development and producer organisations
- Recognition of legume's contribution to environmental and climate targets
- Evolving consumer behaviour and preferences
- Influence of other policies and debates in society (deforestation, SDGs, Renewable Energy Directive, European Bio Economy Strategy)

Market transparency

EU feed protein balance sheet

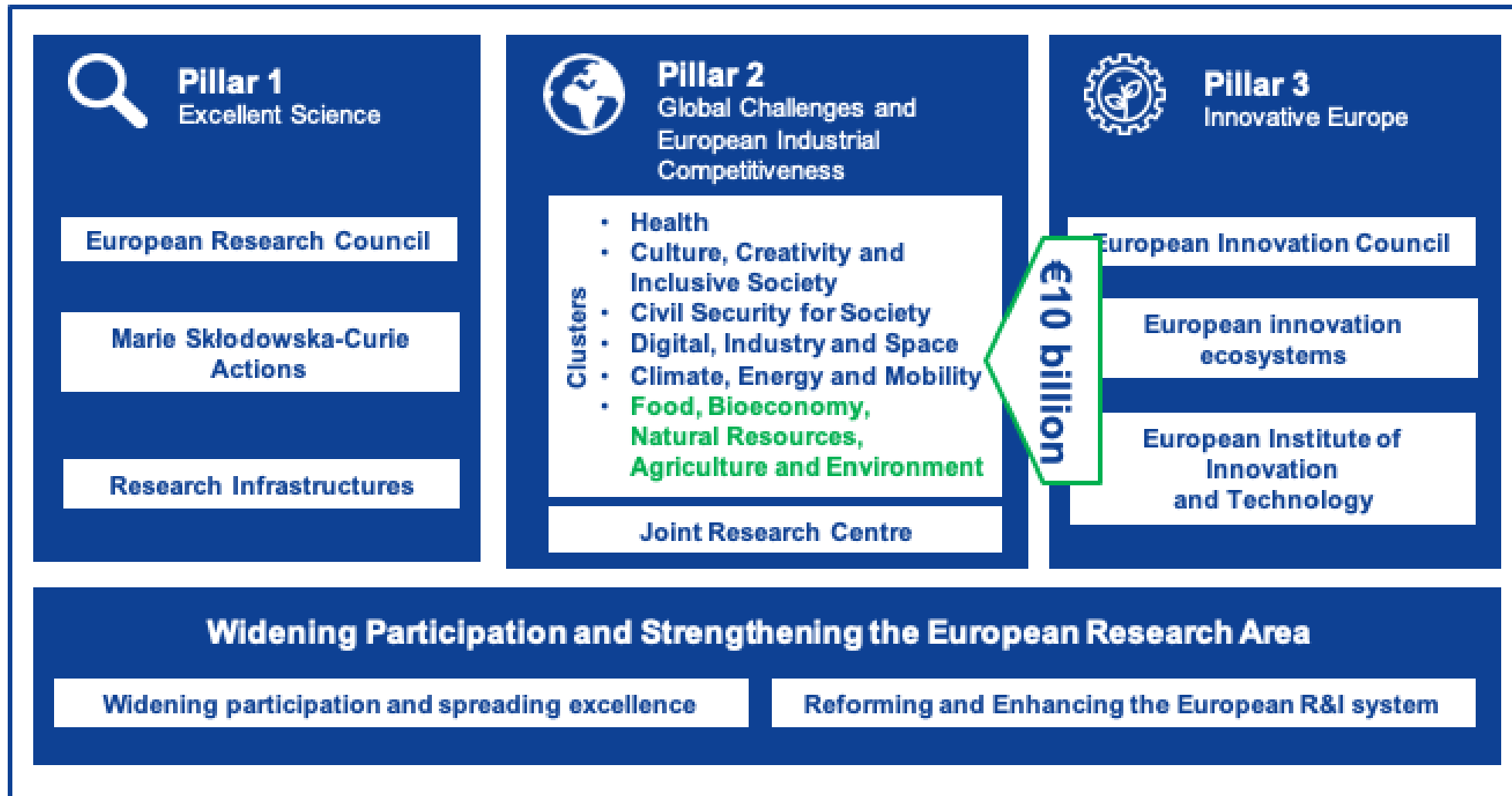


EU self-sufficiency per protein source
(in crude proteins)



https://ec.europa.eu/info/files/eu-feed-protein-balance-sheet-2018-19_en

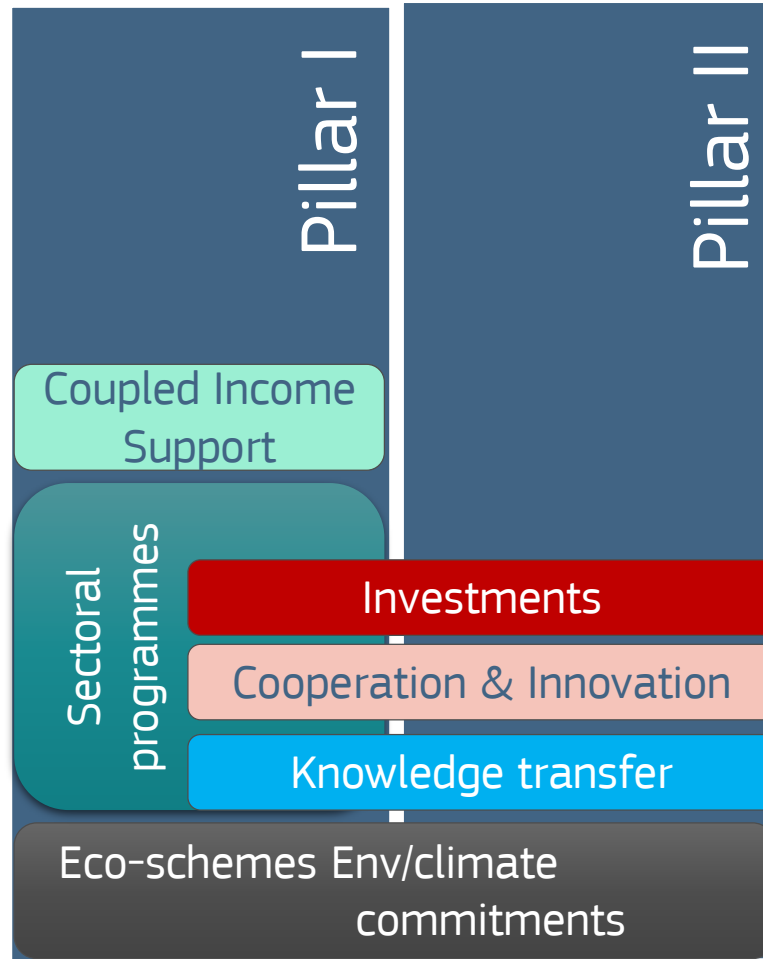
Horizon Europe



Knowledge exchange

- Plant protein seminar in Helsinki 18/19 November 2019
- Highlights:
 - Research and innovation is key
 - The policy for plant proteins is broader than only the CAP
 - 100% self-sufficiency on proteins in dairy possible
 - Sustainability has to be important for everybody, and it needs to be supported by general accepted figures
 - Plant protein food needs to be tasty and needs to have an attractive texture
 - Flexitarians will bring the volume

CAP interventions for protein crops



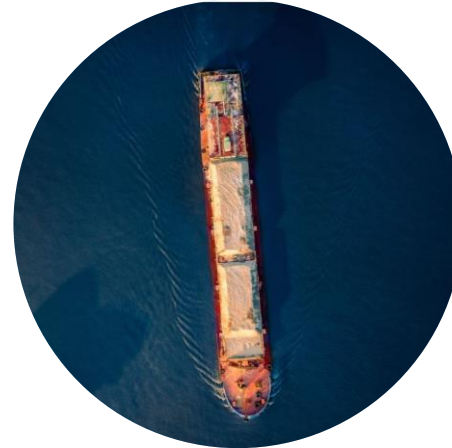
Plant proteins and CAP / F2F / Green Deal Challenges



Breeding, plant varieties with stable yields, quality requirements



Farm income, competitiveness, risk management



Sourcing of raw material for plant-based foods/limited processing capacity, up-scaling



Affordability, “Leave nobody behind”

Plant proteins and CAP / F2F / Green Deal Opportunities



Environmental
and climate
benefits,
significant
reduction of input
use (fertilizers)



Organic
production,
ambitious plans
to increase at
EU level



Product
innovation, new
supply chains,
start-ups,
regional clusters



Health benefits,
flexitarians,
dietary shifts

EU Initiatives – what next?

- “Farm to Fork” Strategy
- CAP Reform
Negotiations with Council and European Parliament ongoing
- Horizon Europe
First calls, which include protein topics, will be launched in 2020/21
- Follow-up on 2018 Commission Report on the Development of Plant Proteins

Thank you