

European protein value chain calls to the European Commission and Member States for action

The Stakeholders – COPA & COGECA, FEFAC and EUROSEEDS, considering the Green Deal and the related Farm to Fork and Biodiversity strategies and related objectives, call on the European Commission to take a leading role in promoting the domestic cultivation and use of European plant sourced protein.

Background

Plant sourced protein is an indispensable component of animal nutrition and plays an ever-increasing role in human nutrition due to changing dietary habits more focused on plants-based diets. Since 2013, the food industry has increased the diversity and quantity of legume products in Europe. Flexitarian, vegetarian and vegan diets are becoming increasingly widespread in the EU Member States.

Since decades, Europe has a shortage of high protein- sources¹ which is filled by imports, and currently, there is an increasing demand for plant-based protein, and ingredients for food uses that are ramping up fast. Without doubt, Europe must and can do more in terms of increasing domestic protein production from plants. It is a declared policy goal of the European Commission² and the Member States to increase the domestic production of plant-based protein to reduce the European Union's dependency on their imports. To achieve this objective, long term, stable and consistent policies of enabling the European protein value chain needs to be strengthened.

Breeders and farmers are already engaged in proposing improved seeds and agronomic practices for better resource management and improved quality and quantity of food per hectare. Results are already visible. An example is the development of legumes which are fixing nitrogen from the air, improving soil fertility and are an integral part of the strategy to manage nutrients and reduce greenhouse gas emissions.

The European value chain sector represented by COPA & COGECA, FEFAC and EUROSEEDS stands ready to support the ramping up of both the demand and the production of EU grown plant sourced protein but call for action at European and Member State levels to enable a sustainable European production

The European Union is structurally in deficit since many years and protein demand trend keeps growing. The situation requires urgent action at European level.

In order to achieve a sustainable EU protein plan and offer European farmers new ways to adapt supply to changing demand, the European plant protein sector needs to be competitive, of high quality and resilient to the numerous economic, environmental, climatic and technological challenges. To achieve these goals, we need consistent European and Member State policies.

¹ https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/feed-protein-balanceshe-explanatory-note_en.pdf

² https://ec.europa.eu/info/food-farming-fisheries/plants-and-plant-products/plant-products/cereals/development-plant-proteins_en

- It is worthwhile to recall that demand for plant-based protein and ingredients for food uses is increasing rapidly.
- No self-sufficiency is achievable in short or midterm for high protein sources, neither for food nor feed.
- Transition period will be needed (in particular if no access to best in class breeding technics, crop protection products and fertilizers).

The EU protein value chain needs to have a legal framework and clear goals to develop European sustainable products to fulfill the demand. For instance, the new organic farming rules and possible trade disruptions will intensify the already existing structural organic protein feed shortage in the EU. Our associations call for urgent collaboration with the European Commission and Member States to build solutions to face this challenge.

The EU must provide a consistent EU-wide framework enabling European protein value chains' competitiveness.

There is no simple and easy solution to overcome the EU high protein sources deficit. From our point of view, this would come from an increase of the production per hectare of the already established crops, an increase of the protein content, the bioavailability and the proportion of essential amino acids in key crops (like e.g. cereals), and better pricing at farm level of protein content or quality above the standard.

Moreover, in many cases, and due to the limited acreage grown, protein crops are considered as Minor Uses and Specialty Crops for which there are not enough solutions at farm level to manage pest and diseases. A proper toolbox of solutions for both farmers and breeders are needed in order to effectively support these productions.

Despite the advances in plant breeding, cultivation and processing technology, Europe is not likely to reach self-sufficiency entirely. A reliance on protein imports from third countries will therefore be here to stay for the foreseeable future. In that view, responsible sourcing initiatives (e.g. soy sourcing guidelines etc.) should be encouraged in order to promote sustainable cultivation and trading practices.

The European value chain is engaged to enable more European protein production but needs support:

- European and Member State support to increase or protect important sources of protein:
 - Through the use of roughage (lucerne, grass, forage legumes ...), animal husbandry contributes to the relief of the protein balance. As a matter of fact, roughage is the main source of EU feed protein however, roughage is not suitable to feed all types of livestock such as pigs and poultry.
 - Oilseed rape, sunflower, wheat and grain legumes are major sources of protein and are already engaged on improving protein contents even more.
- The EU, via Voluntary Coupled Support (VCS) in the Common Agricultural Policy (CAP) to incentivize the production of protein crops, including soybean but not only (e.g. pulses).
- The EU legal framework should enable the production in the EU to develop and be competitive vs global market offer. In terms of prices but also valuing the sustainability aspects and enabling access to the most competitive technical tools like Novel Genomic Techniques (NGTs).

- The EU legal framework around imports to set clear and achievable goals and to support the European value chain to face the changes:
 - Anticipate import challenges and enable development of production in the EU where agronomic conditions permit
 - There are clear voluntary commitments by the feed industry for years for deforestation free supply chain. However, the administrative burden proposed by the Commission risks to discriminate against EU soy farmers which must bear the burden and cost of excessive traceability requirements compared to other oilseeds and protein crops. The proposal would substantially weaken current Member States efforts to boost soya bean cultivation on their territory thus undermining the European Soya Declaration which was signed by 14 EU agriculture ministers on 17 July 2017³.
 - The EU contingency plan for ensuring food supply and food security identifies the need to secure high protein sources supply in the EU.
- Balance the Farm to Fork and CAP objectives by setting up a concrete and effective plan for long-term support for investment, innovation and research throughout the value chain. This will help respond to changing societal and market expectations in order to provide greater value and to tap the potential of digital technologies all the while taking into account their agronomic and economic complementarity. Such support should make it possible to increase the productivity of these areas of production, to establish best production practices.
- Support research investments to enable more sustainable production. The EU should develop a dedicated strategy, possibly linked to Horizon Europe and the EU innovation fund
 - To develop and scaling up production and making marketable new and sustainable sources of proteins;

To Improve productivity and therefore land use, without compromising native disease and insect tolerances. This should be based on main strategies:

- Developing modern methods in nutrient management which determine doses precisely and according to crop needs (nutrient balance, soil analysis, soil, climate and plant physiology modelling, split nitrogen application, late diagnosis of crop nutrient shortage); developing intra-plot modulation of fertilizer doses, and large-scale implementation of precision farming techniques.
- Enabling support towards genetic enhancement of plants (breeding and selection of more productive varieties that are more resistant to climatic conditions, to disease and to pests) by using higher performing germplasms (in collaboration, if necessary, with international partners), phenotyping work to allow selection in the field and enabling use of best-in-class and modern breeding technics.
- Maintaining an EU harmonized registration system promoting protein content and quality for relevant crops, the EU registration system will also play a key role and the Dialog with official variety testing authorities on how to credit traits that stimulate protein production in the EU and robustness will be critical.
- Improving production systems by geographical area to define crop growth programs which boost productivity per hectare (sowing dates, previous cropping, resistance to disease, crop protection, climate resilience, use of mixtures of species, and soil fertility).

³ [European Soya Declaration, 2017](#)

- Improving the protein content of key crops targeting higher physiological efficiency in crop nitrogen uptake could also be a means of increasing the EU's protein stocks.
- Improving the quality and the valuation of proteins on the market, in particular by improving the amino-acid content demanded in pig and poultry feed.
- Support public and private research for better use crops that today are under-utilised as source of protein:
 - Support research to identify the factors which would boost the incorporation of those crops (e.g. dehulling for sunflower).
 - The question of the withdrawal of chemical plant protection products must be approached from the point of view of breeding while eliminating active ingredients. When no alternative to plant protection product exists, existing solutions need to remain.
 - Besides research into improved use of those crops, it is crucial to provide B2B promotion measures and training in order to provide farmers with the necessary information. Indeed, many livestock farmers lack experience of using new sources of protein.
 - The prospects for developing the bioeconomy within the EU could be promising thanks notably to the strategy established by the European Commission. Thus, the development of fractionation and bio-refining technologies should lead to the emergence of new co-products for animal feed, in addition to those that are already available and in use (bran, distillers' grain, meal, etc.) As an example, grass is usually used as fodder for ruminants. However, thanks to bio-refining it is possible to produce protein for monogastric animals while at the same time keeping higher quality fodder for ruminants and precious brown juice for the production of biogas. Despite the obvious positive effects of bio-refining grass, this technology is still new and needs to be further developed before its potential benefits can be fully exploited on a commercial scale.

Conclusions

Increasing the domestic protein production to reduce dependency on imports, increase diversity in crop use and lower carbon footprint) therefore we call for the EU to take the following framework conditions:

- to provide a consistent EU framework enabling European protein value chains' competitiveness
- to provide meaningful and long-term incentives to stakeholders
- to develop a balance sheet to track productions and consumptions of food plant protein, and to support the development of national feed protein balance sheets
- to develop innovation-friendly framework for competitive research and development
- to support educational communication to consumers on the EU sustainable agricultural production practices and benefits of diversified and balanced diet that include plant protein-based food



Organization's introduction

COPA and COGECA - Copa and Cogeca are the united voice of farmers and agricultural cooperatives in the EU. Together, they ensure that European agriculture is sustainable, innovative and competitive, thus ensuring food security for half a billion people in Europe. In Europe. Copa represents over 23 million farmers and their families, while Cogeca defends the interests of 22,000 agricultural cooperatives. They have 66 member organizations from the EU Member States. Together, they constitute one of the largest and most active lobbying organizations in Brussels ([GOL\(18\)585\(rev.14\)](#) [CER\(18\)4799\(rev.4\)](#)).

EUROSEEDS - Euroseeds is the voice of the European seed sector. We, therefore, represent the interests of those active in research, breeding, production and marketing of seeds of agricultural including protein, horticultural and ornamental plant species. The European seed sector launched the roadmap for a European protein plan that can be assessed [here](#).

FEFAC the European Compound Feed Manufacturers' Federation, represents 23 national Associations in 23 EU Member States as well as Associations in Switzerland, Turkey, Serbia, Russia and Norway with observer/associate member status. The EU feed industry currently processes around 30 mio. tonnes of soy alone, being as such the largest user of proteins of vegetable origin. The FEFAC position on the protein plan strategy is available [here](#).