


Europen Protein Strategy

22 November 2019

Ljubljana

Who is FEFAC?

- European federation of national associations of CompoundFeed and Premix Manufacturers
- Founded in 1959
- Based in Brussels
- 163 mio. T of industrial compound feed production in 2018
- 23 EU Member Associations and 9 associate/observer members

Animal Nutrition
Chairperson: P. Peršak (CFIA)
Vice-Chair: P. Radewahn (DVT)

Industrial Compound Feed Production
Chairperson: P. Musil (SKK)
Vice-Chair: J. Piçarra (IACA)

Milk Replacers
Chairperson: E. Fernhout (ASSALZOO)
Vice-Chair: H. Swinkels (NEVEDI)

Premix and Mineral Feed
Chairperson: R. Sijtsma (NEVEDI)
Vice-Chair: J.F Labarre (EUROFAC)

Fish Feed
Chairperson: O. Christensen(DAKOFO)
Vice-Chair: T.A. Molland (NSF)

Feed Safety Management Committee
Chairperson: A. Booth (AIC)
Vice-Chair: Y. Dejaegher (BEMEFA)

Sustainability
Chairperson: C. Callu-Mérite (EUROFAC)
Vice-Chair: K. van der Velden (NEVEDI)

FEFAC

Active Members

VFÖ	Austria	1995 (1964)
BFA	Belgium	1959
BFMA	Bulgaria	2013
CFIA	Croatia	2013 (2008)
CAFM	Cyprus	2004 (2003)
SKK	Czech Republic	2004 (2000)
DAKOFO	Denmark	1973
FFDIF	Finland	1995 (1993)
EUROFAC*	France	1959
DVT	Germany	1959
HGFA	Hungary	2012
IGFA	Ireland	1973
ASSALZOO	Italy	1959
LGPA	Lithuania	2005
NEVEDI	The Netherlands	1959
IZP	Poland	2004 (2001)
IACA	Portugal	1986 (1976)
ANFNC	Romania	2014
AFPWTC	Slovakia	2004 (2003)
GZS	Slovenia	2004
CESFAC	Spain	1986
FS	Sweden	1995
AIC	United Kingdom	1973

(observer as from ...)

*EUROFAC took over from SNIA in 2016

Observer Members

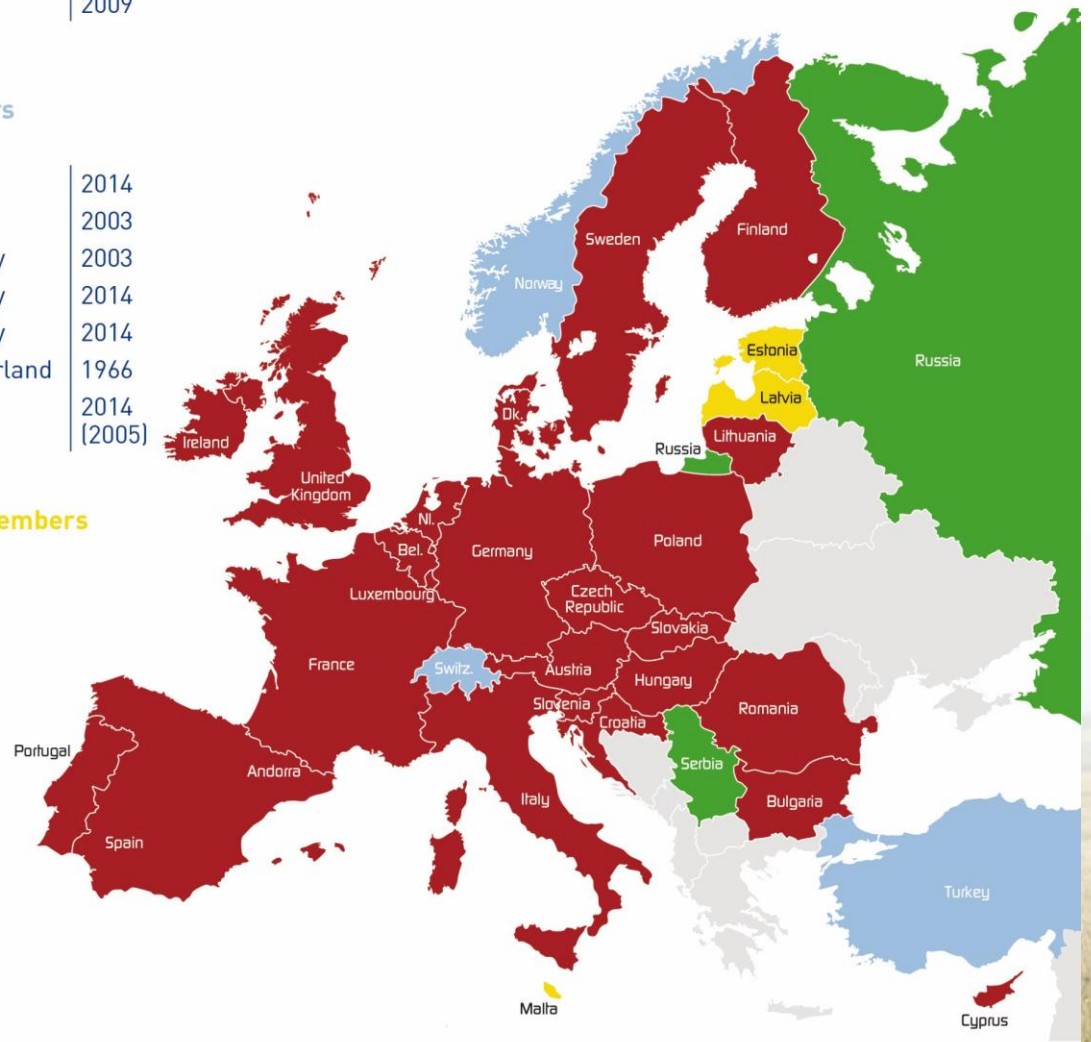
RUFM	Russia	2010
SFMA	Serbia	2009

Associate Members

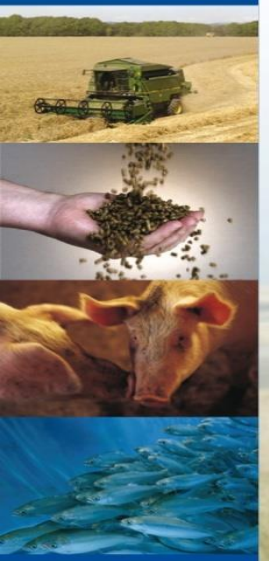
EFFPA		2014
EMFEMA		2003
NSF	Norway	2003
FKF AS	Norway	2014
Norkorn	Norway	2014
VSF	Switzerland	1966
TURKIYEM	Turkey	2014 (2005)

Potential Active Members

- Estonia
- Latvia
- Malta

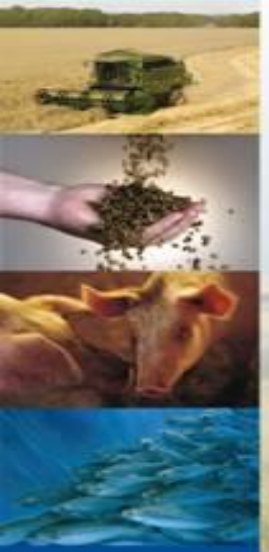


Situation on 1 January 2018



Outline

- EU protein plan
- FEFAC perspective
- EU state of play in the World
- Overview of EU feed Protein Balance Sheet
- What about the future?
- Conclusion



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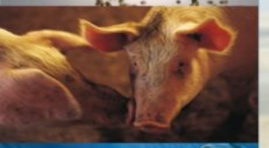


EU Protein Plan

EU Protein Plan

- Announced by Commissioner Hogan at FEFAC Congress June 2017
- Feed industry the most important potential purchasers of EU grown protein

EU protein deficit: A long-standing issue

Table 2 : Origin of the products used for animal feeding in the enlarged Community and degree of self-sufficiency during the 1971/72 crop year.

(1.000 tons)

	Origin : EEC (a)	Non-member countries (b)	Total (c) (= a + b)	Degree of self-sufficiency (%) (d) (= a : c)
1. Cereals	50 975	16 693	67 668	75.3
2. leguminous vegetable seeds (field beans, etc...)	890	-	890	100
3. Cake	612	13 619	14 231	4.3
incl. soya	-	7 323	7 323	0
4. a) Fish meal	423	966	1.389	30.5
b) Meat meal	837	-	837	100
5. Grass meal (lucerne, etc....)	1 347	-	1.347	100
6. Milk powder	1 221	-	1 221	100

Source : DG VI Estimate

...ROPEAN COMMUNITIES

COM(73) 1850 final ANNEXES

Brussels, 16 November 1973

REPORT ON

...HE COMMUNITY'S PROTEIN SUPPLIES

PART IV

...it would seem to be an effort to avoid ...pplies of proteinic

EC report on development of plant proteins in the EU

- Options for further strengthening the development of EU-grown plant proteins:

1. Support farmers growing plant proteins via the proposed future CAP, by including them in national CAP strategic plans
2. Continue to boost competitiveness through R&I
3. Improve market analysis and transparency, through better monitoring tools for plant proteins
4. Promote the benefits of plant protein for nutrition, health, climate and environment
5. Increase sharing of knowledge/best practice in supply chain management and sustainable agronomic practices and bundle information on research activities in breeding, technical innovation and processing, e.g. on a dedicated knowledge platform

FEFAC

FEFAC perspective

EU Protein Plan / FEFAC messages (Vienna Nov 2018)

Key messages delivered by Nick Major, FEFAC President at EU conference:

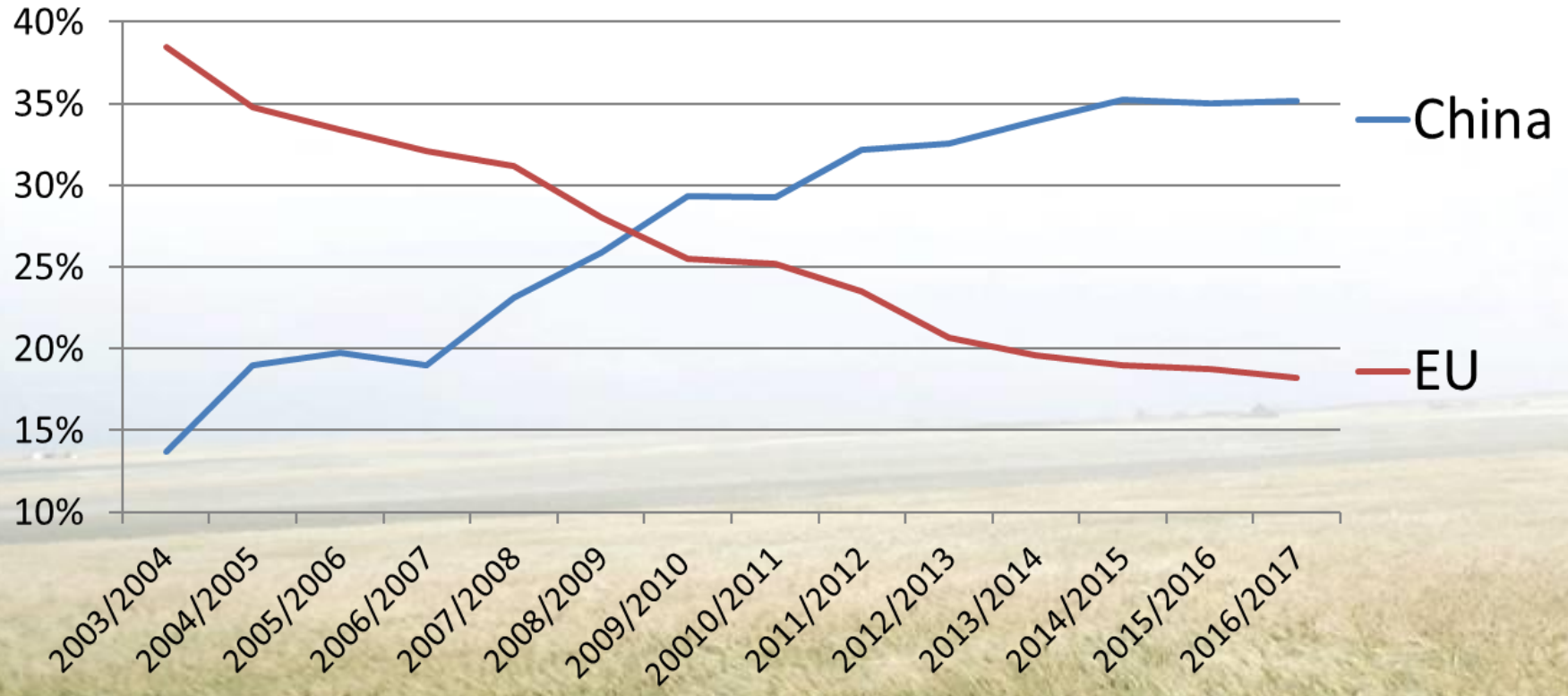
- Need for high quality digestible sources of proteins for animal nutrition,
- Need for more research and better tools & technology to farmers to increase competitiveness of EU vegetable protein production
- Need to establish level playing field conditions for "non-GM" niche markets
- Need maintain Market Access to imports of vegetable proteins,

FEFAC

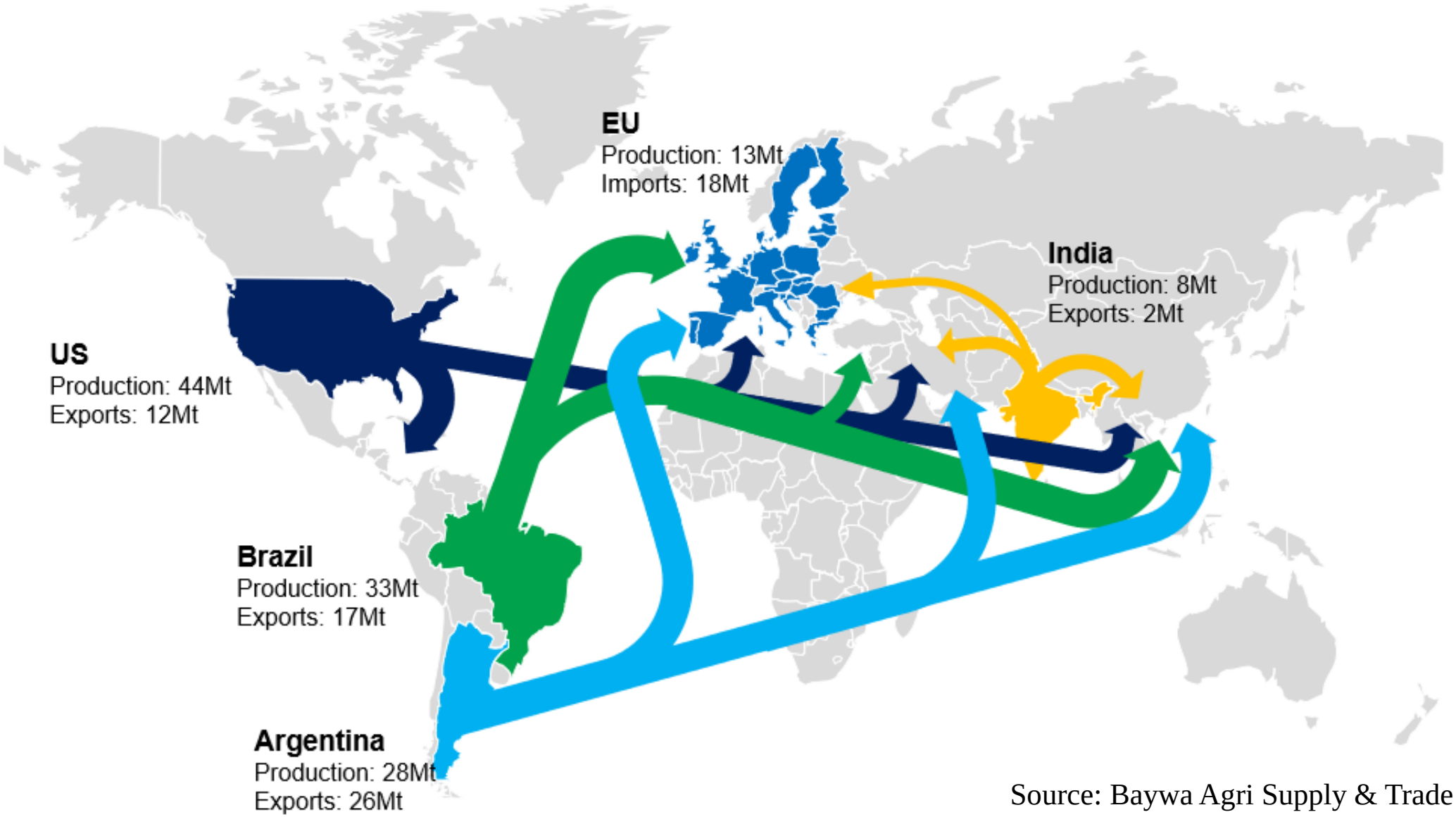
Protein: EU state of play in World

EU protein deficit: strategic perspective

Evolution of market share of global SBM equivalent imports (source:USDA)

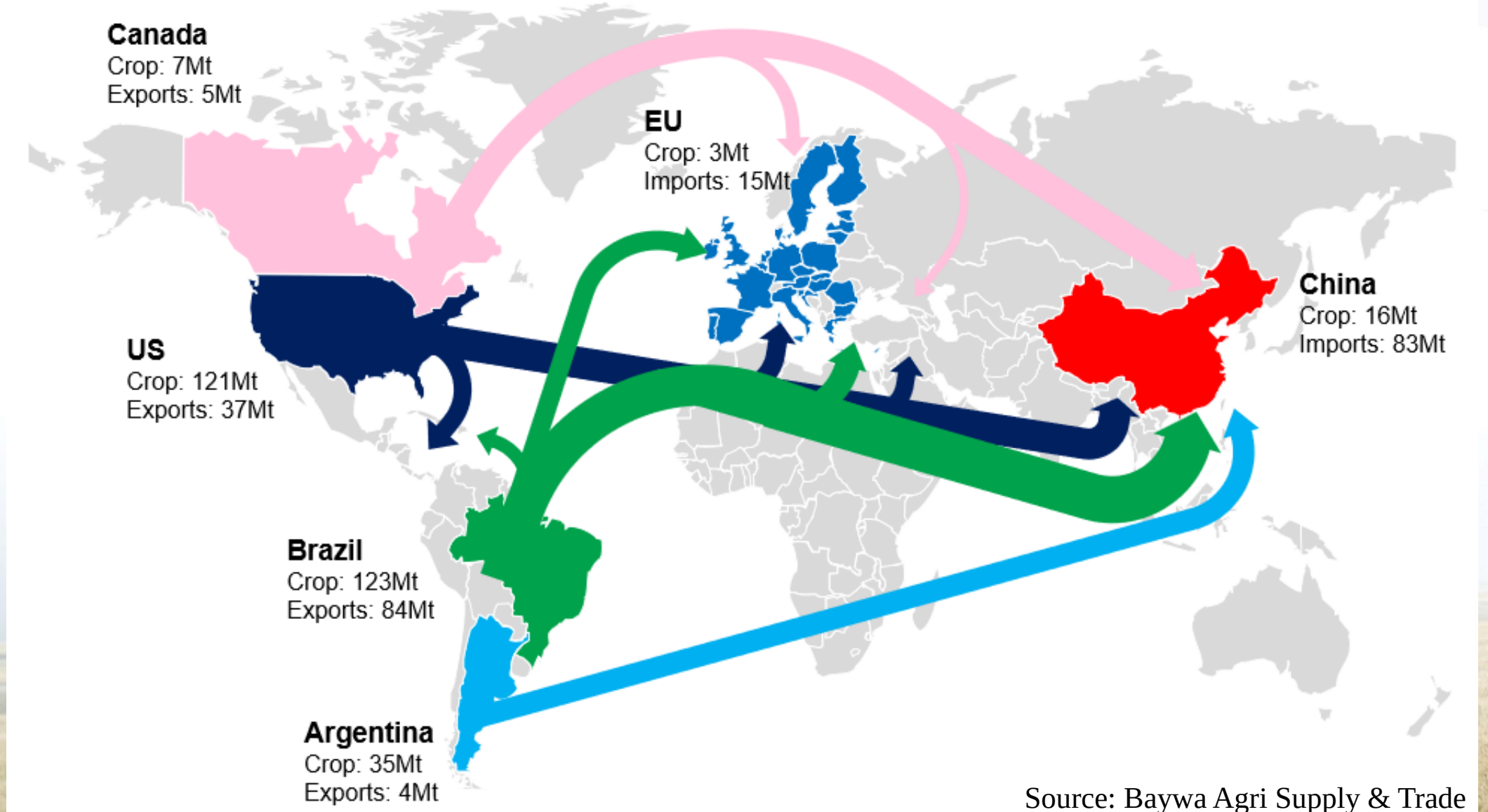


18/19 Global soybean meal trade flows



Source: Baywa Agri Supply & Trade

18/19 Global soybean trade flows



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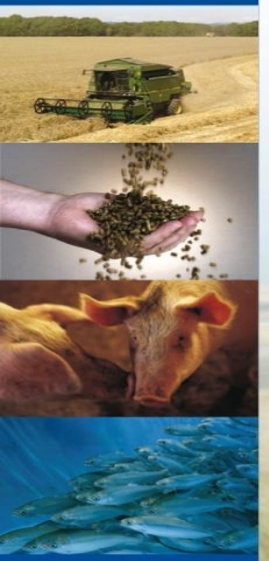
FEFAC



70% of protein deficit in Europe

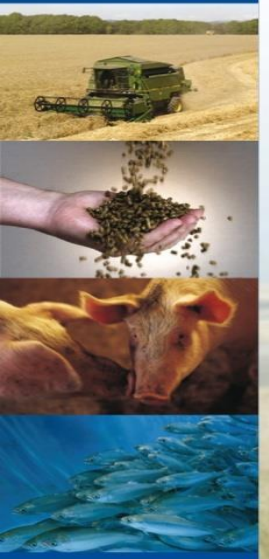
Is the EU Protein Deficit Reality or misconception?
Overview of EU feed Protein Balance Sheet

FEFAC

November 2019

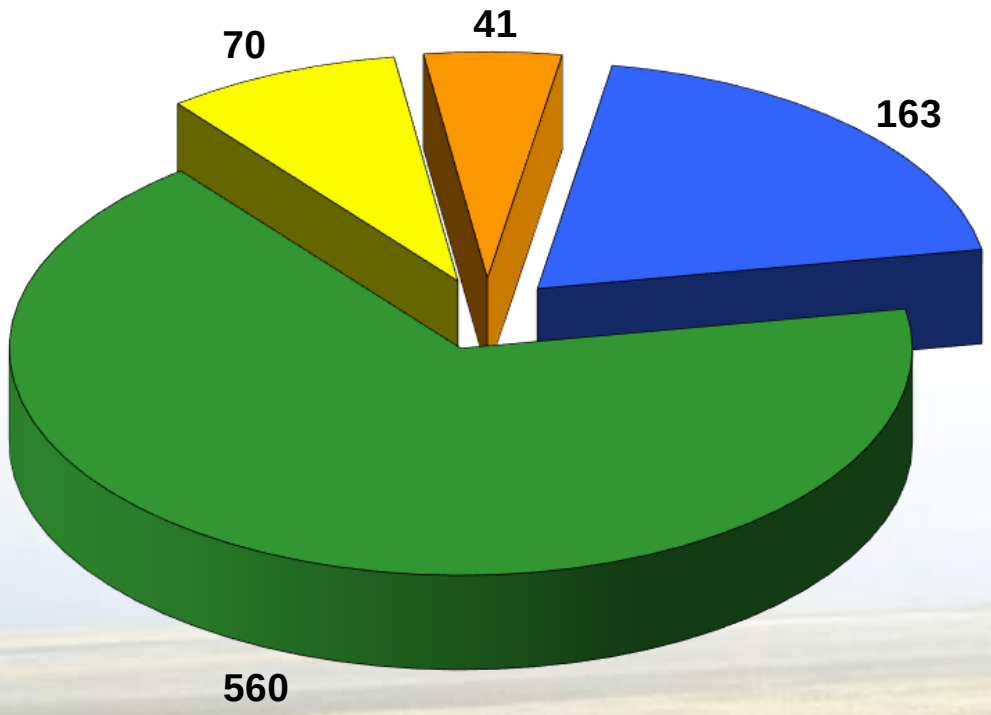
EU Feed Protein Balance Sheet

2017/18	Million tonnes						Protein content (feed use) (G)	Million tonnes (crude protein)			% of total feed use
Protein source	Total EU production (A)	EU imports (B)	EU exports (C)	Total EU domestic use (D)	EU total feed use (E)	Feed use EU origin (F)		EU total feed use (H) = (E) * (G)	Feed use EU origin (I) = (F) * (G)	% feed use of EU origin (I) / (H)	
CROPS					**179.5**	**158.8**		**19.29**	**17.44**	**90%**	**22%**
CEREALS (of which)	305.3	24.5	33.6	296.2	174.1	153.5		*17.81*	*16.03*	90%	21%
Common Wheat	142.0	4.0	21.4	124.6	52.2	48.2	11.0%	5.74	5.30		
Durum Wheat	58.3	0.5	9.0	49.8	39.3	39.3	12.0%	4.72	4.72		
Barley	8.7	1.5	1.1	9.1	0.8	0.8	10.0%	0.08	0.08		
Grain Maize	64.8	17.9	1.8	80.9	57.4	41.3	8.0%	4.59	3.30		
Rye	7.2	0.1	0.1	7.2	2.1	2.1	11.0%	0.23	0.23		
Sorghum	0.7	0.4	0.0	1.1	0.7	0.4	11.0%	0.08	0.05		
Oats	8.1	0.0	0.2	7.9	6.2	6.2	11.0%	0.68	0.68		
Triticale	11.5	0.0	0.0	11.5	10.9	10.9	11.0%	1.20	1.20		
Other cereals	4.0	0.2	0.0	4.1	4.5	4.3	11.0%	0.50	0.48		
OILSEEDS (feed use without crushing)	35.1	18.7	1.0	52.7	1.6	1.6		*0.50*	*0.50*	100%	1%
(columns (E) and (F))											
Soya beans	2.7	14.1	0.3	16.5	1.2	1.2	36.0%	0.43	0.43		
Rapeseed	22.0	4.0	0.1	25.9	0.2	0.2	18.8%	0.04	0.04		
Sunflowerseed	10.4	0.6	0.6	10.3	0.2	0.2	14.8%	0.03	0.03		
PULSES (of which)	5.2	0.6	1.1	4.8	3.8	3.6		*0.97*	*0.90*	93%	1%
Field Peas	2.8	0.4	0.7	2.5	1.9	1.9	22.5%	0.43	0.43		
Broad beans	2.2	0.0	0.4	1.8	1.5	1.5	26.0%	0.38	0.38		
Lupins	0.3	0.2	0.0	0.5	0.5	0.3	35.0%	0.16	0.09		
CO-PRODUCTS					**87.1**	**49.8**		**26.71**	**10.70**	**40%**	**31%**
OILSEED MEALS	31.0	24.8	1.3	54.5	54.4	17.3		21.58	5.92	27%	25%
SOYA BEAN MEALS (of which)	11.2	18.8	0.4	29.6	29.5	0.9		*13.46*	*0.38*	*3%*	*16%*
Soya bean meal (from EU soya bean production)	0.9			0.9	0.9	0.9	43.0%	0.38	0.38		
Soya bean meal (from imported soya beans)	10.0		0.4	9.6	9.5	0.0	45.5%	4.34	0.00		



EU-28 Livestock sourcing in feedingstuffs – 834 mio. t in 2018

Source: FEFAC / EU Commission

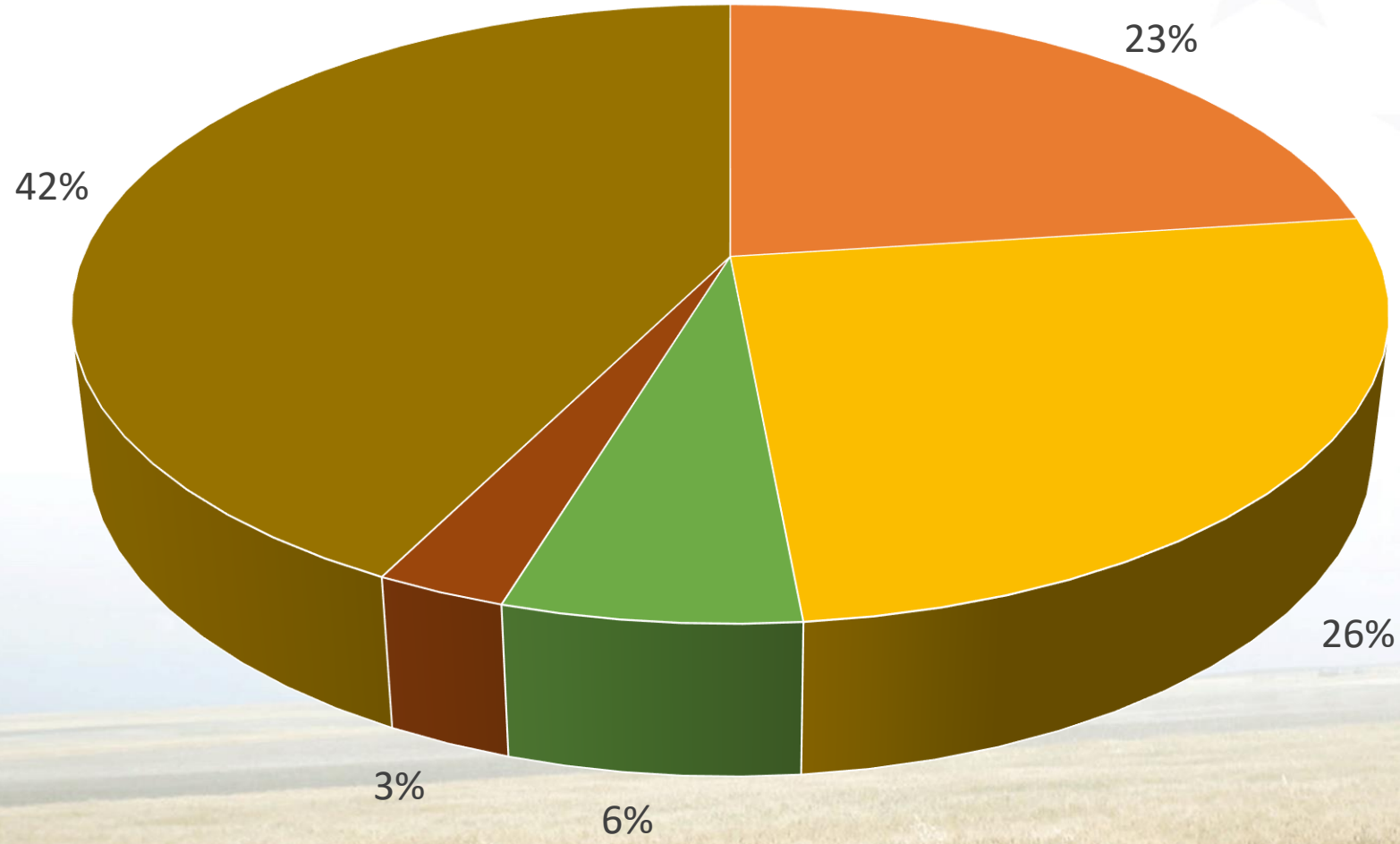


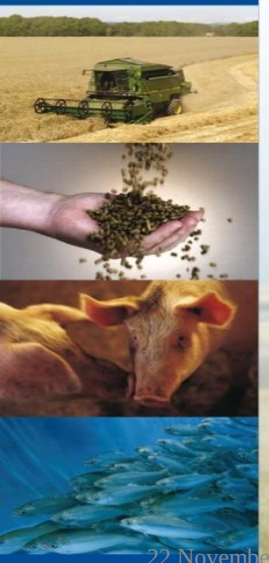
Every proteins counts:

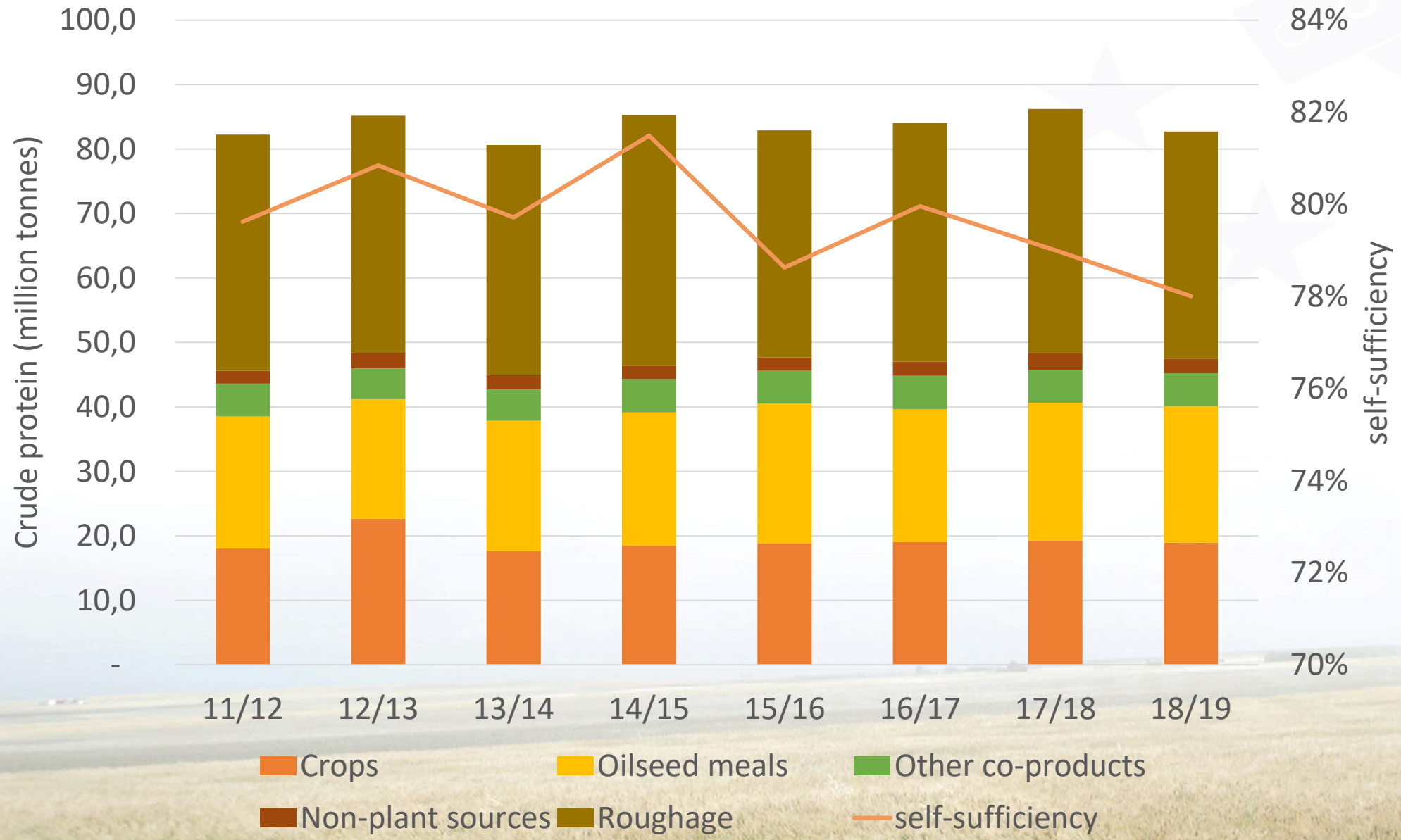
When looking at feed proteins, need to look at all sources (incl. forages)




Protein sources 18/19



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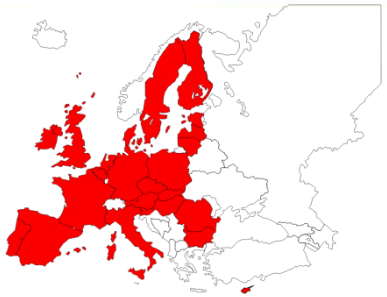
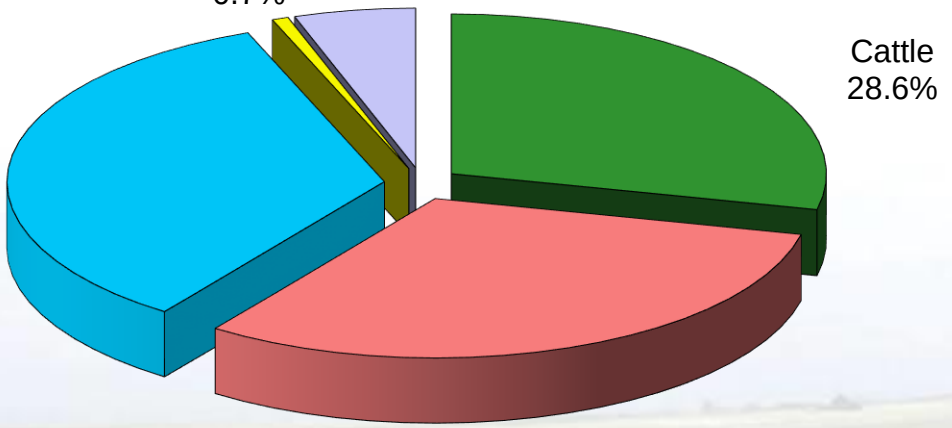
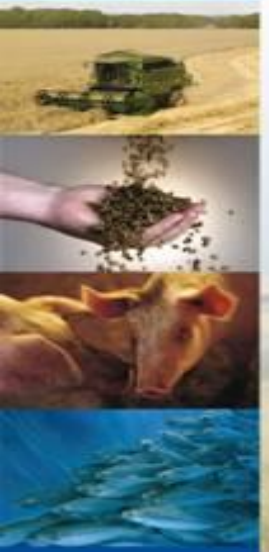
-
Crude protein (million tonnes)
84%
82%
80%
78%
76%
74%
72%
70%
self-sufficiency
11/12
12/13
13/14
14/15
15/16
16/17
17/18
18/19
Crops
Oilseed meals
Other co-products
Non-plant sources
Roughage
self-sufficiency

Industrial compound feed production in the EU-28 in 2018 - 163.3 mio. t (per category)

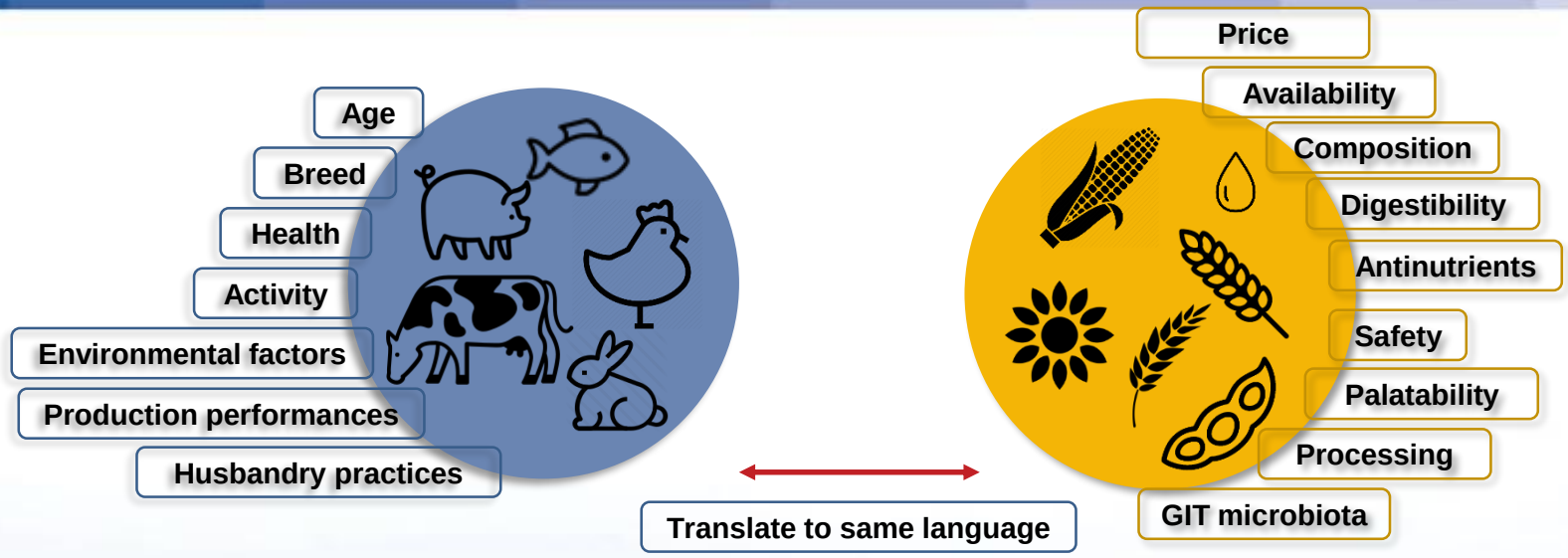


Source: FEFAC

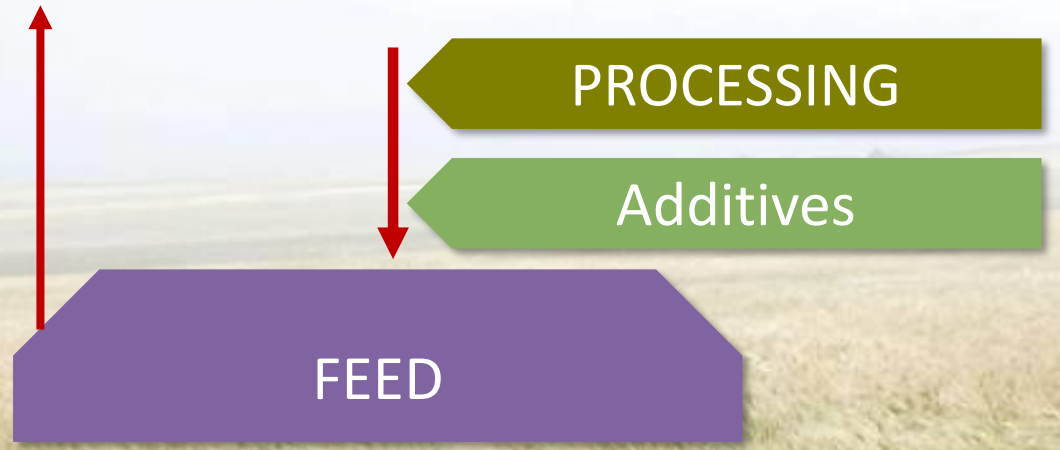




Animal feed industry – the link between ingredients and nutrition

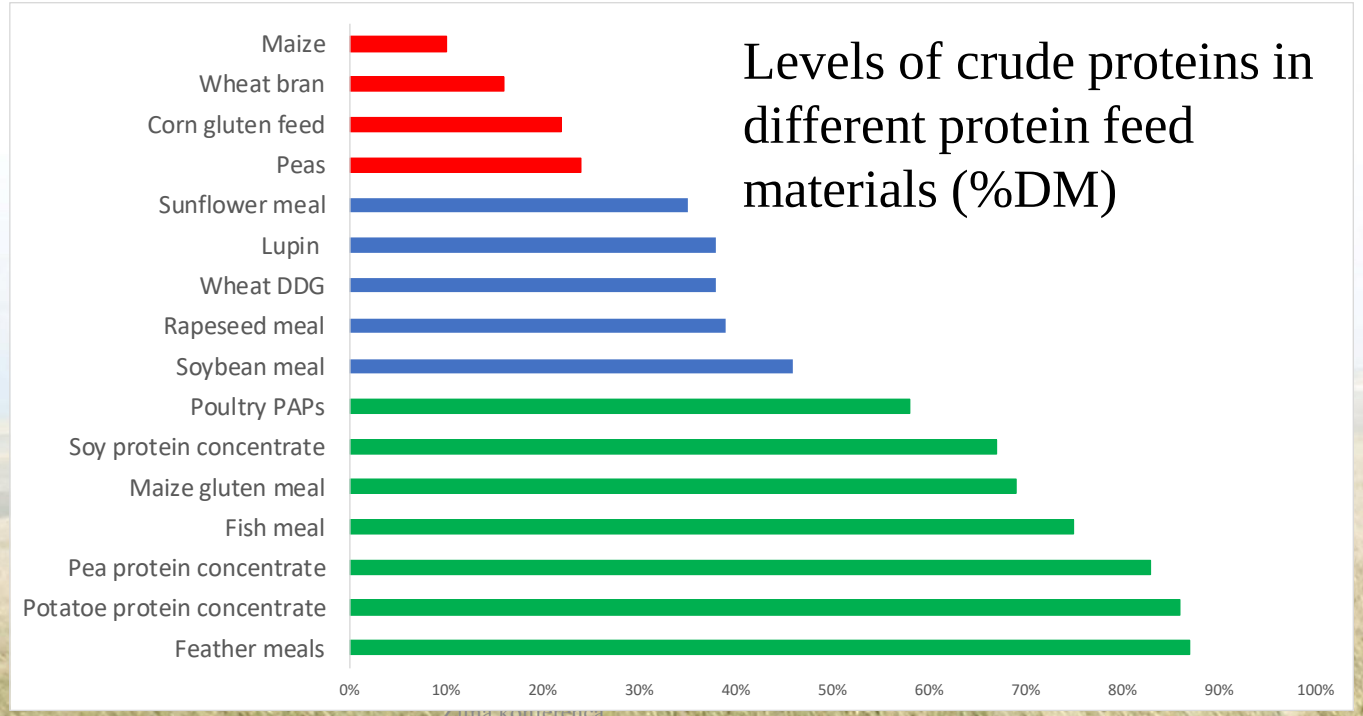


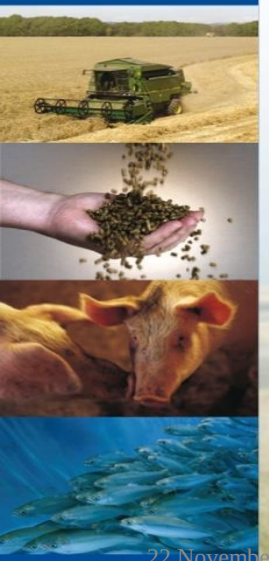
All these parameters matter when considering a feed protein supply!



Different options for different species

Species	Young animals / fish	Ruminants	Monogastrics adults
Level of proteins of protein rich feed ingredients	Very high concentrations >60%	Moderate concentrations 27 - 44	High concentrations 30-48
Protein quality	Very high digestibility	Ruminant specific digestibility	Monogastric specific digestibility
Antinutrients	Very low levels	Low levels	Low levels



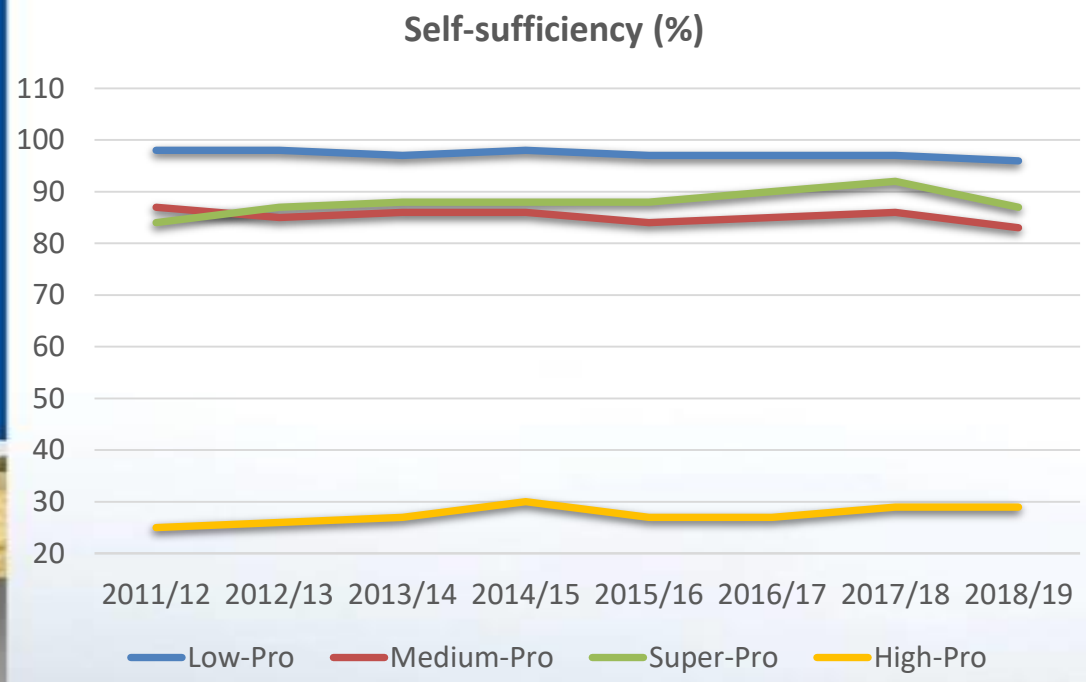


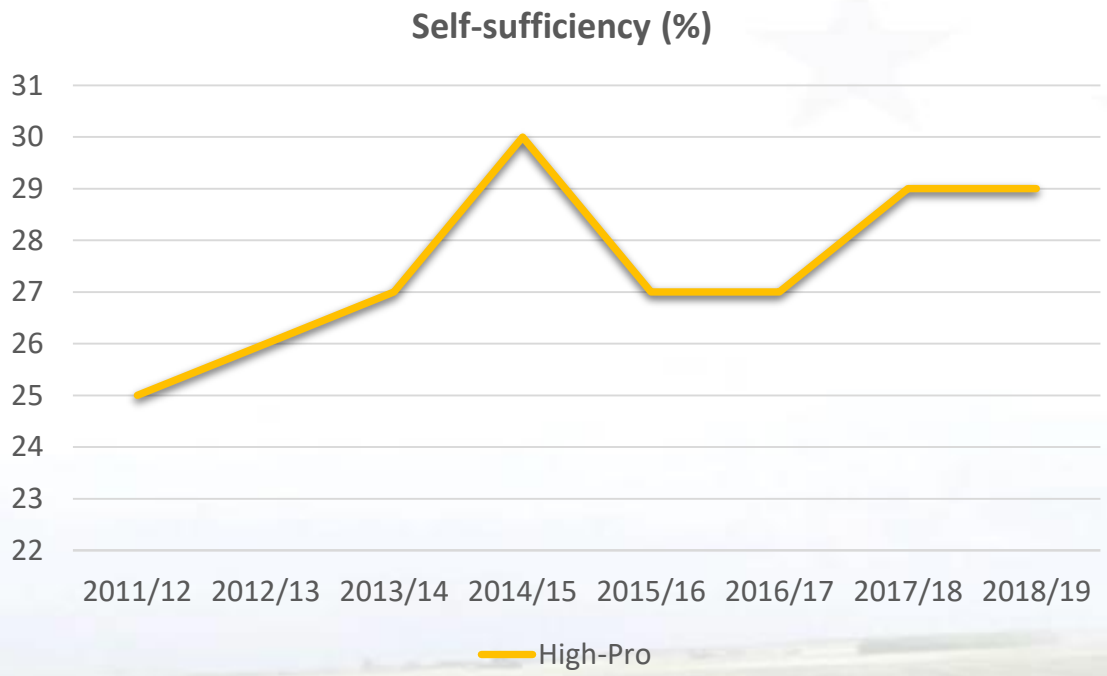
Starch industry's medium protein products (15%-30%)	4.0	0.6	0.4	4.3	4.0	4.0	19.0%	0.76	0.76		
Starch industry's super protein products (60%-90%)	1.1	0.0	0.0	1.1	0.7	0.7	73.0%	0.51	0.51		
Distillers' Dried Grains with Solubles	3.6	1.1	0.2	4.5	4.5	3.4	30% wheat 27% maize	1.33	1.02		
Wet Distillers' Grain	6.8	0.0	0.0	6.8	6.8	6.8	5.4%	0.37	0.37		
Wheat bran	8.4	0.1	0.2	8.3	8.3	8.3	15.5%	1.29	1.29		
Citrus pulp	0.0	0.3	0.0	0.3	0.3	0.0	7.5%	0.02	0.00		
Beet pulp pellets	6.9	1.3	0.2	8.1	8.1	6.8	7.9%	0.64	0.53		
Molasses	3.5	1.8	0.1	5.1	1.6	1.6	10,7% beet 4,2% cane	0.18	0.18		
NON-PLANT SOURCES					**8.4**	**8.2**		**2.25**	**2.13**	**95%**	**3%**
(excluding on-farm use)											
Fish Meal	0.5	0.3	0.1	0.6	0.6	0.5	65.0%	0.31	0.30		
Whey Powder	1.8	0.1	0.7	1.2	0.6	0.6	12.5%	0.07	0.07		
Skimmed Milk Powder	1.6	0.0	0.9	0.7	0.1	0.1	34.0%	0.05	0.05		
Processed Animal Proteins	3.8	0.1	1.3	2.6	2.1	2.1	60.0%	1.24	1.24		
Former Foodstuff					5.0	5.0	9.5%	0.48	0.48		
ROUGHAGE					***1,242***	***1,242***		***35***	***35***	***100%***	***42%***
Grass	*942*			*942*	*942*	*942*	*2.5%*	*24*	*24*		
Silage maize	*237*			*237*	*237*	*237*	*2.9%*	*7*	*7*		
Fodder legumes	*62*			*62*	*62*	*62*	*7.2%*	*4*	*4*		
Dried Fodder	3.3	0.0	1.8	*1.5*	*1.5*	*1.5*	17.0%	*0.25*	*0.25*		
TOTAL								**83**	**64**	**77%**	

Legend

Low-Pro: Less than 15% protein content	54.47	52.07	96%
Medium-Pro: 15-30% protein content	4.72	3.91	83%
High-Pro: 30-50% protein content	21.42	6.19	29%
Super-Pro: Over 50% protein content	2.35	2.05	87%

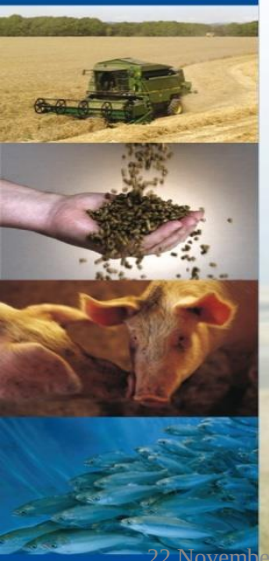
EU Feed Protein Balance sheet (October 2019)

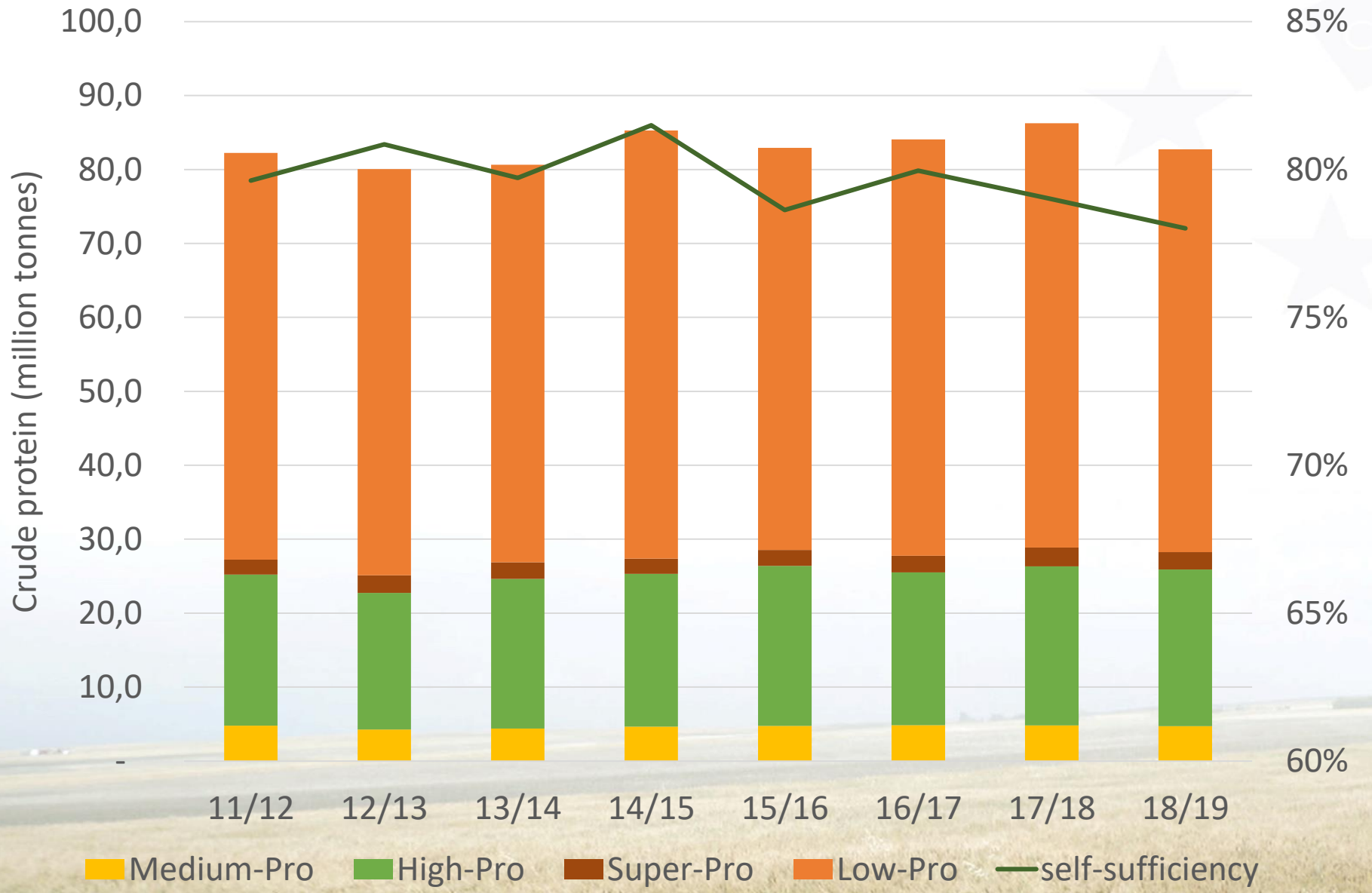




Estimated EU total protein **self-sufficiency**: 78%
(i.e. total deficit: 22%)

Legend
Low-Pro: Less than 15% protein content
Medium-Pro: 15-30% protein content
High-Pro: 30-50% protein content
Super-Pro: Over 50% protein content

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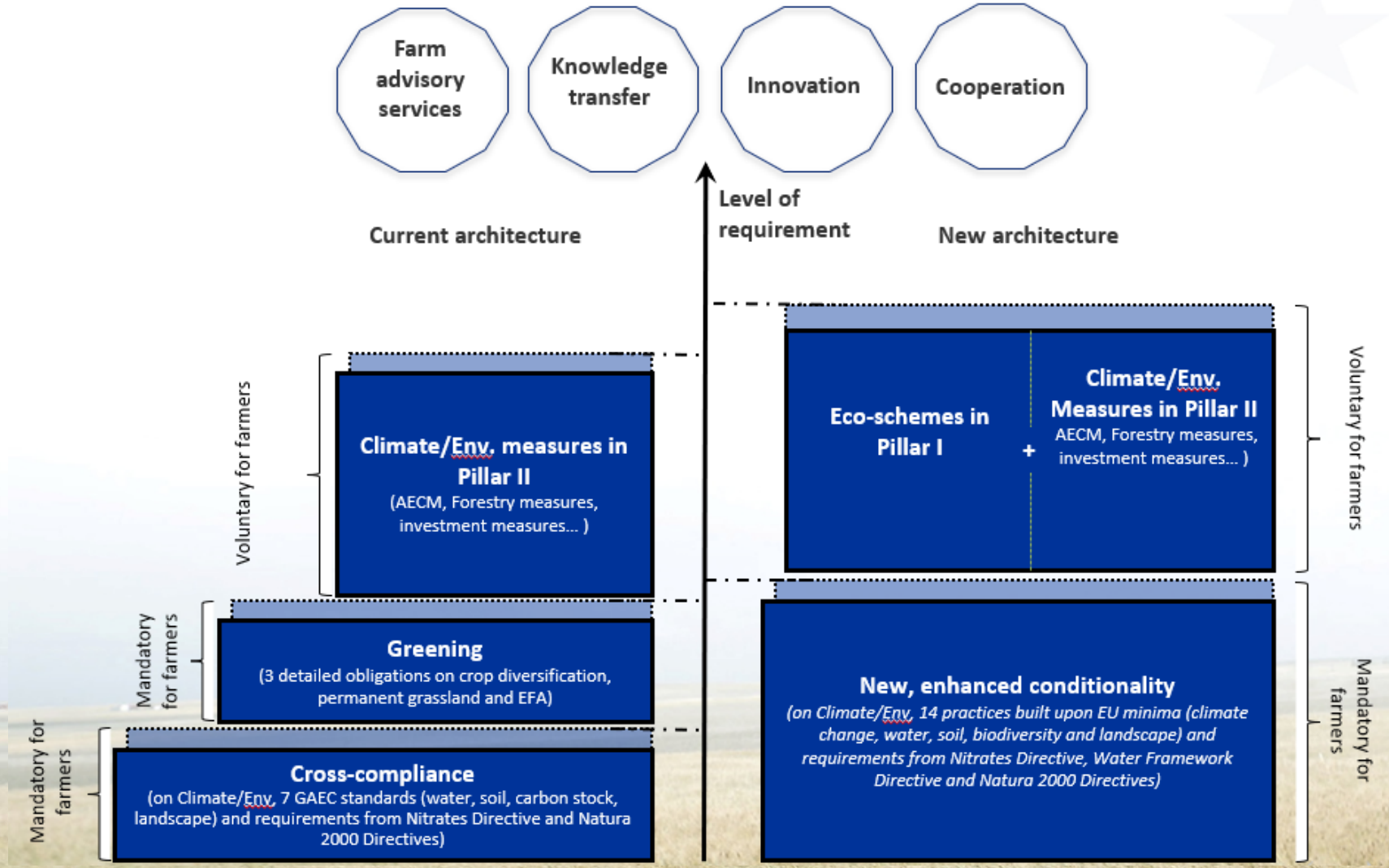
Crude protein (million tonnes)
85%
80%
75%
70%
65%
60%
11/12
12/13
13/14
14/15
15/16
16/17
17/18
18/19
Medium-Pro
High-Pro
Super-Pro
Low-Pro
self-sufficiency

FEFAC

What about future?

The New Green Architecture



The proven record of plant breeding innovation

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What future for EU plant breeding innovation?

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Industry shocked by EU Court decision to put gene editing technique under GM law

By Sarantis Michalopoulos | EURACTIV.com

25 jul. 2018 (updated: 9 aug. 2018)

In 2016, France asked the ECJ to clarify whether a variety of herbicide-resistant rapeseed obtained through new plant breeding techniques (NPBTs) should follow the GMO approval process. [Shutterstock]

THE FEFAC 2030 Animal Feed Industry Vision

Feed Safety Management	Animal Nutrition	Sustainability

FEED INDUSTRY ANIMAL FOOD CHAIN SOLUTIONS

Feed safety management capacity building

Preservation of animal health to reduce need for antibiotics

Accommodate animal welfare demands

Facilitate responsible sourcing

Co-operation between control authorities & industry operators

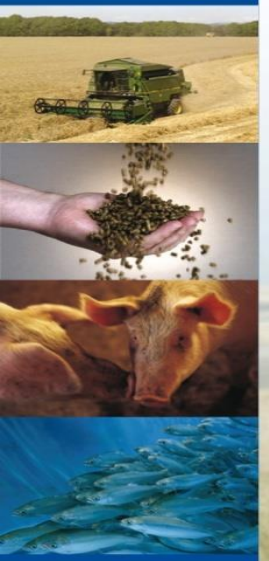
Risk management optimisation along the feed chain

Develop new resource efficiency indicators

Improve the quality & nutritional value of food products

Increasing nutrient efficiency

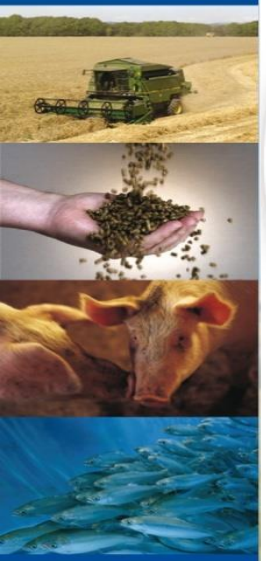
Measure the environmental performance of feed production



Conclusion

- Long-standing issue, new elements (non-GM, “pesticide-free”, zero-deforestation..) must be considered
- Every proteins counts: when looking at feed proteins, need to look at all sources (incl. forages) → EU produce more protein than we import!
- Understand the whole picture – dependency on high proten sources (soy, sunflower)
- The global agricultural commodity market is changing
- Key role of innovation in plant breeding, cultivation and processing technology
- What we need to do?
  - Need to increase production of high-protein feed materials
  - Need to increase protein efficiency (reducing protein consumption)
- European level – ensuring level playing / National level – CAP strategic plans?

Thank you for your attention!



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