# Stakeholder Survey - A Protein Plan for Europe

Fields marked with * are mandatory.

## I. Introduction

Welcome to the stakeholder survey on *A Protein Plan for Europe*!

Thank you very much for agreeing to take part in our survey.

Your input will help the European Commission to better prepare the report on *A Protein Plan for Europe*. This report will build upon existing knowledge and national and regional experiences and is planned to be published end of 2018.

Your expertise, thoughts and opinions are highly appreciated.

The survey should not take longer than 20 minutes to complete.

**The deadline to reply is Friday 23rd March 2018.**

Additional remarks and documents can be attached at the end of the questionnaire (in any official EU language).

If you have further questions about the survey please email us to *AGRI-G4@ec.europa.eu*

## II. About you

* ***Country of residence***

- Austria
- Belgium

- Bulgaria
- Croatia
- Cyprus
- Czech Republic
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- Netherlands
- Poland
- Portugal
- Romania
- Slovak Republic
- Slovenia
- Spain
- Sweden
- United Kingdom
- Other

If other, please specify:

*** *Confidentiality and access to documents***

*Note that, whatever option chosen, your answers may be subject to a request for public access to documents under Regulation (EC) N° 1049/2001.*

Your contribution

- [x] can be published **with your personal information**. I consent to the publication of all information in my contribution in whole or in part including my name or my organisation's name, and I declare that nothing within my response is unlawful or would infringe the rights of any third party in a manner that would prevent publication.
- [ ] can be published provided that you **remain anonymous.** I consent to the publication of all information in my contribution in whole or in part (which may include quotes or opinions I express) provided that it is done anonymously. I declare that nothing within my response is unlawful or would infringe the rights of any third party in a manner that would prevent publication.

***Type of organisation***

- ○ Farmer/Farmers' association
- ○ Consumer/Consumer organisation
- ○ Company/Industry association
- ○ Research and academia
- ◉ Non-governmental organisation
- ○ Public authority (national or regional)
- ○ International organisation
- ○ Other

***Please specify the sector***

- ○ Agriculture - crop production
- ○ Agriculture - livestock production
- ○ Food processing industry
- ○ Feed processing industry
- ○ Other processing industry
- ○ Agricultural trade
- ○ Research
- ◉ Civil society
- ○ Other

If other, please specify:

## III. Questions

***1. Have you been involved or are you aware of any ongoing public or private initiatives to support plant protein production in the EU?***

- ○ yes
- ◉ no

If yes, please specify (including link to relevant documentation):

## Scope

***2. Which sources of plant proteins would you consider most relevant to address in the Commission report on plant proteins?***

| | Highly relevant | Partly relevant | Not relevant | *No opinion* |
|---|---|---|---|---|
| Cereals | ◉ | ○ | ○ | ○ |
| Soya | ◉ | ○ | ○ | ○ |
| Other oilseeds (other than soya) | ○ | ◉ | ○ | ○ |
| Grain legumes/pulses (e.g. peas and faba peas) | ◉ | ○ | ○ | ○ |
| Fodder legumes (e.g. alfalfa and clover) | ○ | ○ | ◉ | ○ |
| By-products from cereals industry (e.g. corn gluten feed/DDGS) | ○ | ○ | ◉ | ○ |
| Soya meal | ○ | ○ | ◉ | ○ |
| By-products from other oilseeds (e.g. rapeseed meal) | ○ | ○ | ◉ | ○ |
| Other sources | ○ | ○ | ○ | ○ |

If other, please specify:

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

In our opinion it is particularly relevant to address plant proteins that can be grown in the EU and that can at the same time be directly consumed by the people living in the EU. The focus should be on plant protein to feed humans, not animals, as plant proteins are a valuable and healthy protein source. Regionally produced and consumed protein plants can have positive health and environmental impact.

***3. Which areas would you address as priority in relation to plant proteins in Europe?***

Please mark the **five** areas you consider most important:

*at most 5 choice(s)*

- ☐ Research and innovation
- ☐ Yield improvement
- ☑ Protein quality
- ☐ Profitability/price
- ☐ Agricultural practices
- ☑ Environmental benefits
- ☑ Food supply/value chain development
- ☐ Feed supply/value chain development

- [x] Food market demand/segmentation
- [ ] Feed market demand/segmentation
- [x] Other

If other, please specify:

waste

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

A shift from protein plants for feed production to protein plants for human consumption can help reduce waste. Producing protein plants for livestock feed is highly inefficient, as the majority of the plant calories is lost when it is converted into calories available from animal-based foods. When the protein plants are instead used for direct human consumption, many of these calories can be saved and protein plant production made more efficient.

***4. Which of the following policy measures would you consider having the most positive impact on soya and other legume crops?***

*at most 5 choice(s)*

- [ ] Voluntary Coupled Support payments under the Common Agricultural Policy
- [ ] Greening requirements – Crop diversification under the Common Agricultural Policy
- [ ] Greening requirements – Ecological Focus Areas under the Common Agricultural Policy
- [ ] Agri-Environment-Climate measures under the Common Agricultural Policy
- [ ] Investment aid under the Common Agricultural Policy
- [ ] Risk management under the Common Agricultural Policy
- [ ] Knowledge transfer (extension services, trainings, model demonstration networks)
- [ ] EU Research Policy – Horizon 2020
- [ ] EU Renewable Energy Policy
- [ ] EU Trade Policy
- [ ] Other policy measures at EU level
- [ ] Other policy measures at national/regional level

If other, please specify:

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

Policy measures addressing the issues connected to EU-wide overconsumption of meat and other animal products are needed to have a positive impact on plant protein. A shift from animal to plant-based protein has significant health and environmental advantages that should clearly be communicated and promoted with appropriate policies.

***5. If further action should be taken to support plant proteins in the EU, who do you think should take such action?***

*at most 2 choice(s)*

- [x] EU Institutions
- [ ] Member States (national authorities)
- [ ] Regional authorities
- [x] Combination of EU, national and/or regional authorities
- [ ] Private operators in the supply chain
- [ ] Farmers' associations and cooperatives
- [ ] Other

If other, please specify:

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

The Common Agricultural Market of the EU has the potential to induce positive change for a whole continent. Only in a joint effort of the national and EU level can changes towards a more sustainable, healthy and efficient agriculture be achieved.

## Agricultural practices and environmental benefits

**6. Which are the most important agronomic and environmental benefits of soya and other legume crops in your opinion?**

| | Very important | Important | Neutral | Less important | Not important | *No opinion* |
|---|---|---|---|---|---|---|
| Crop diversification / crop rotation | ○ | ○ | ○ | ○ | ○ | ○ |
| Reduced use of fertilisers / nutrient management | ○ | ○ | ○ | ○ | ○ | ○ |
| Enhanced soil fertility | ○ | ○ | ○ | ○ | ○ | ○ |
| Forage for pollinators | ○ | ○ | ○ | ○ | ○ | ○ |
| Improved weed/disease management | ○ | ○ | ○ | ○ | ○ | ○ |
| Soil water retention | ○ | ○ | ○ | ○ | ○ | ○ |
| GHG emission (Greenhouse Gas) | ◉ | ○ | ○ | ○ | ○ | ○ |

| | | | | | | |
|---|---|---|---|---|---|---|
| Biodiversity | ○ | ○ | ○ | ○ | ○ | ○ |
| Other | ◉ | ○ | ○ | ○ | ○ | ○ |

If other, please specify:

waste

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

A shift from animal-based protein to plant protein such as soya or legumes can promote climate change mitigation, as animal products have the highest GHG emissions among food commodities. Furthermore, promoting protein plants for human consumption can help reduce food waste, as less energy is lost when plant protein is converted into animal protein.

## Markets

***7. In your experience, which of the following is most relevant to strengthen the plant protein supply/value chains in EU?***

| | Very relevant | Partially relevant | Not relevant | No opinion |
|---|---|---|---|---|
| Seed availability | ○ | ○ | ○ | ○ |
| Yield improvement | ○ | ○ | ○ | ○ |
| Plant Protection solutions | ○ | ○ | ○ | ○ |
| Extension/advisory services | ○ | ○ | ○ | ○ |
| Storage capacity | ○ | ○ | ○ | ○ |
| Processing capacity | ○ | ○ | ○ | ○ |
| Marketing capacity | ○ | ○ | ○ | ○ |
| Quantity of supply | ○ | ○ | ○ | ○ |
| Quality of supply | ○ | ○ | ○ | ○ |
| Profitability/price | ○ | ○ | ○ | ○ |
| Cooperation networks through supply chain | ○ | ○ | ○ | ○ |
| Labelling/quality certification | ○ | ○ | ○ | ○ |
| Market information | ○ | ○ | ○ | ○ |

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

## Feed markets

***8. In your experience, which of the following feed market segments/value chains is currently the most developed for plant proteins?***

**I. Soya and soya meals**

Please rate from highly developed to not developed

| | highly developed | sufficiently developed | less developed | not developed | *no opinion* |
|---|---|---|---|---|---|
| Commodity markets in (global) feed value chains | ○ | ○ | ○ | ○ | ○ |
| Regional feed value chains (incl. labelling/quality certification) | ○ | ○ | ○ | ○ | ○ |
| Organic | ○ | ○ | ○ | ○ | ○ |
| On-farm feed uses | ○ | ○ | ○ | ○ | ○ |

**II. Grain legumes/pulses**

Please rate from highly developed to not developed

| | highly developed | sufficiently developed | less developed | not developed | *no opinion* |
|---|---|---|---|---|---|
| Commodity markets in (global) feed value chains | ○ | ○ | ○ | ○ | ○ |
| Regional feed value chains (incl. labelling/quality certification) | ○ | ○ | ○ | ○ | ○ |
| Organic | ○ | ○ | ○ | ○ | ○ |
| On-farm feed uses | ○ | ○ | ○ | ○ | ○ |

**III. Fodder legumes**

Please rate from highly developed to not developed

| | highly developed | sufficiently developed | less developed | not developed | *no opinion* |
|---|---|---|---|---|---|
| Commodity markets in (global) feed value chains | ○ | ○ | ○ | ○ | ○ |
| Regional feed value chains (incl. labelling/quality certification) | ○ | ○ | ○ | ○ | ○ |
| Organic | ○ | ○ | ○ | ○ | ○ |
| On-farm feed uses | ○ | ○ | ○ | ○ | ○ |

**IV. Oilseeds, cereals and its by-products (e.g. meals and DDGS)**

Please rate from highly developed to not developed

| | highly developed | sufficiently developed | less developed | not developed | *no opinion* |
|---|---|---|---|---|---|
| Commodity markets in (global) feed value chains | ○ | ○ | ○ | ○ | ○ |
| Regional feed value chains (incl. labelling/quality certification) | ○ | ○ | ○ | ○ | ○ |
| Organic | ○ | ○ | ○ | ○ | ○ |
| On-farm feed uses | ○ | ○ | ○ | ○ | ○ |

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

## Food markets

***9. In your experience, how well are the following food market segments/value chains for plant proteins currently developed?***

*Please rate from highly developed to not developed*

| | highly developed | sufficiently developed | less developed | not developed | *no opinion* |
|---|---|---|---|---|---|
| Commodity markets in (global) food value chains | ○ | ○ | ◉ | ○ | ○ |

| | | | | | |
|---|---|---|---|---|---|
| Regional feed value chains (incl. labelling/quality certification) | ○ | ○ | ◉ | ○ | ○ |
| Organic | ○ | ○ | ◉ | ○ | ○ |

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

(assuming the above mentioned second option is supposed to read "regional food value chains")
Plant protein should more extensively be promoted as a healthy and environmental friendly alternative to animal-based protein. Economic measures, such as tax reductions for protein plants for food, are supposable, as well as governmental information and education campaigns for plant protein benefits.

***10. Which are the most promising market segments/value chains for EU plant proteins?***

- ☐ Commodity markets in (global) feed value chains
- ☐ Regional feed value chains (incl. quality certification/label)
- ☐ On-farm feed uses
- ☑ Commodity markets in (global) food value chains
- ☑ Regional food value chains (incl. quality certification/label)
- ☐ Bio economy/industrial value chains (non-food/non-feed)
- ☐ Other

If other, please specify:

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

The most promising market for plant proteins in the EU is in human consumption, as this provides health and environmental benefits for the continent. Animal protein and its current overconsumption is linked to a number of NCDs. Plant protein is a healthy, valuable protein source that in addition provides environmental benefits, as water, waste and GHG emissions can be saved if it is used for human food rather than animal feed.

## Research

***11. Have you been already involved in research and innovation related to plant proteins?***

- ○ yes
- ◉ no

If yes, please specify (including link to relevant documentation):

***12. Which future research priorities would you consider most relevant for EU plant proteins?***

Please rate from highly relevant to not relevant:

| | Highly relevant | Partially relevant | Not relevant | *No opinion* |
|---|---|---|---|---|
| Breeding and genetics for improved productivity (e.g. higher yield or stress and pest resistance) | ○ | ○ | ○ | ○ |
| Breeding and genetics for suitability in farming systems (e.g. mechanisation or harvest losses) | ○ | ○ | ○ | ○ |
| Breeding and genetics for suitability in value chains (e. g. storage and processing suitability) | ○ | ○ | ○ | ○ |
| Breeding and genetics for food or feed nutrition (incl. higher protein content) | ○ | ○ | ○ | ○ |
| Integration in sustainable cropping systems: impact on crop rotation practices | ○ | ○ | ○ | ○ |
| Integration in sustainable cropping systems: impact on weed/disease or nutrient/agrichemical management | ○ | ○ | ○ | ○ |
| Environmental benefits: quantification of impact on nitrogen, water, soil, GHG emissions, biodiversity | ◉ | ○ | ○ | ○ |
| Other | ○ | ○ | ○ | ○ |

If other, please specify:

***13. To implement research in plant proteins, which of the following instruments or approaches are most relevant?***

Please rank **five** instruments in order of importance.

| | Very important | Important | Neutral | Less important | Not important | *No opinion* |
|---|---|---|---|---|---|---|
| EU Research Programmes under Horizon 2020 | ○ | ○ | ○ | ○ | ○ | ○ |

| | | | | | | |
|---|---|---|---|---|---|---|
| Research funded under the European Agricultural Fund for Rural Development - European Innovation Partnership EIP-AGRI Operational Groups | | | | | | |
| National Research Programmes | | | | | | |
| Private R&D in feed or food supply chains | | | | | | |
| Other | | | | | | |

If other, please specify:

## Concluding Questions - Challenges and Opportunities

***14. What are the key challenges facing plant proteins in the EU for the coming 5 to 10 years?***

*2000 character(s) maximum*

Key challenge will be to reduce protein plant usage for animal feed in order to be able to be self-sufficient with protein plants for human consumption in the EU. Soy imports for feed production will have to be reduced to a minimum or completely eliminated to reduce environmental impact outside of the EU. Soy and legumes should instead be grown regionally and directly converted into caloric energy for humans, so that less is wasted and protein production made more efficient.

***15. What are the key opportunities offered to plant proteins in the EU for the coming 5 to 10 years?***

*2000 character(s) maximum*

The value of plant protein for human consumption is a definitve opportunity. Plant proteins are healthy and have less environmental impact than animal proteins and should therefore be promoted as a direct protein source for humans. EU politics and institutions have the means to shift consumption away from animal products as the main protein source to plant-based alternatives.

Please feel free to **upload any complimentary document** e.g. a strategy paper or position paper on plant proteins (maximum 5 pages)

Please upload your file

The maximum file size is 1 MB

## Thank you very much for taking part in our survey!

### Contact

AGRI-G4@ec.europa.eu