

# Stakeholder Survey - A Protein Plan for Europe

Fields marked with \* are mandatory.

## I. Introduction

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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](mailto:AGRI-G4@ec.europa.eu)

## II. About you

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\* ***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

- 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:

Public health

## **III. Questions**

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***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	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soya	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other oilseeds (other than soya)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grain legumes/pulses (e.g. peas and faba peas)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fodder legumes (e.g. alfalfa and clover)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
By-products from cereals industry (e.g. corn gluten feed/DDGS)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Soya meal	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
By-products from other oilseeds (e.g. rapeseed meal)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other sources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If other, please specify:

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

- The Commission should prioritise legumes best suited for direct human consumption. Recommendations for a healthy diet include eating more vegetables, fruit, legumes, nuts & whole grains, while cutting down on salt, sugar and fat. (WHO, <http://bit.ly/1n3oyHq>) These can also bring significant environmental benefits if combined with reduction in meat and dairy consumption.
- “Across studies, consistent evidence indicated that a dietary pattern higher in plant-based foods...and lower in animal-based foods (especially red meat), as well as lower in total energy, is both healthier and associated with a lesser impact on the environment.” (Nelson et al. <http://bit.ly/2j1Klvi>)
- A 2017 report by the High Level Panel of Experts on Food Security and Nutrition (<http://bit.ly/2GagqD3>) recommends to, inter alia, increase the intake of fruits, vegetables, legumes, nuts and whole grains; moderate the consumption of animal-based foods (dairy, meat, eggs shellfish) and limit processed meats.

**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
- Food market demand/segmentation
- Feed market demand/segmentation
- Other

If other, please specify:

health benefits

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

- Replacing proteins from red and processed meat with healthy plant-based proteins can bring significant co-benefits for environment and health. This in particular in the European context with high levels of animal product consumption. (PBL, <http://bit.ly/2DJ9Pu5>)
- A modelling exercise of the effects of a 50% reduction in the intake of beef, dairy, pork, poultry and eggs linked to an equivalent reduction in production, showed: 40% reduction in saturated fat intake, bringing saturated fats closer to WHO recommended levels, Red meat consumption close to the maximum level recommended by the WCRF; Decrease in EU greenhouse gas emissions by 19-42% (<http://bit.ly/2DI5LdJ>)
- Replacing proteins from red and processed meat with healthy plant-based proteins could also increase land availability

**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

- The upcoming CAP reform represents a good policy opportunity to support plant protein production for human food. Such production should not however replace areas earmarked to improve environmental quality like ecological focus areas, or entail any further biodiversity losses.
- VCS should be focused on supporting locally adapted protein crops that can maximise agronomic and environmental benefits.

**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)

- EU Institutions
- Member States (national authorities)
- Regional authorities
- 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

Farmers, and authorities at all levels should be involved. Civil society organisations working on health and environmental issues should also be involved in the development of an EU plant protein strategy.

## 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	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reduced use of fertilisers / nutrient management	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enhanced soil fertility	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Forage for pollinators	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improved weed/disease management	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Soil water retention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
GHG emission (Greenhouse Gas)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Biodiversity	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If other, please specify:

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

Replacing proteins from red and processed meat with healthy plant-based proteins can bring significant co-benefits for environment and health. This in particular in the European context with high levels of animal product consumption. (PBL, <http://bit.ly/2DJ9Pu5>). Studies have highlighted the opportunity costs of using human edible crops for animal feed. In 2010, the global livestock sector used 6 billion tonnes of food – 14% of which was human edible. 14% of global agricultural land, equating to half of global arable land which would be suitable for growing human-edible crops, is used for livestock grazing. Including land used for feed production, a total of about 40% of global arable land is used to rear and feed livestock. (<http://bit.ly/2u4dZND>)

## 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	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Yield improvement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Plant Protection solutions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Extension/advisory services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Storage capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Processing capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing capacity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Quantity of supply	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of supply	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Profitability/price	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cooperation networks through supply chain	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Labelling/quality certification	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Market information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	<i>no opinion</i>
Commodity markets in (global) feed value chains	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regional feed value chains (incl. labelling/quality certification)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
On-farm feed uses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### **II. Grain legumes/pulses**

Please rate from highly developed to not developed

	highly developed	sufficiently developed	less developed	not developed	<i>no opinion</i>
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Commodity markets in (global) feed value chains	<input type="radio"/>				
Regional feed value chains (incl. labelling/quality certification)	<input type="radio"/>				
Organic	<input type="radio"/>				
On-farm feed uses	<input type="radio"/>				

### **III. Fodder legumes**

Please rate from highly developed to not developed

	highly developed	sufficiently developed	less developed	not developed	<i>no opinion</i>
Commodity markets in (global) feed value chains	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regional feed value chains (incl. labelling/quality certification)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
On-farm feed uses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### **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	<i>no opinion</i>
Commodity markets in (global) feed value chains	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regional feed value chains (incl. labelling/quality certification)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
On-farm feed uses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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	<i>no opinion</i>
Commodity markets in (global) food value chains	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regional feed value chains (incl. labelling/quality certification)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Organic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If needed, please provide further comments to your answer:

*1000 character(s) maximum*

**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*

## 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	<i>No opinion</i>
Breeding and genetics for improved productivity (e.g. higher yield or stress and pest resistance)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Breeding and genetics for suitability in farming systems (e.g. mechanisation or harvest losses)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Breeding and genetics for suitability in value chains (e.g. storage and processing suitability)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Breeding and genetics for food or feed nutrition (incl. higher protein content)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Integration in sustainable cropping systems: impact on crop rotation practices	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Integration in sustainable cropping systems: impact on weed/disease or nutrient/agrichemical management	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environmental benefits: quantification of impact on nitrogen, water, soil, GHG emissions, biodiversity	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If other, please specify:

Potential health and environmental benefits of replacing consumption of animal protein with plant-proteins, in line

**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	<input type="radio"/>	<input checked="" type="radio"/>				
Research funded under the European Agricultural Fund for Rural Development - European Innovation Partnership EIP-AGRI Operational Groups	<input type="radio"/>	<input checked="" type="radio"/>				
National Research Programmes	<input type="radio"/>	<input checked="" type="radio"/>				
Private R&D in feed or food supply chains	<input type="radio"/>	<input checked="" type="radio"/>				
Other	<input type="radio"/>	<input checked="" type="radio"/>				

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

- ◆ In light of the need to ensure sustainable food and nutrition security in the context of an increasing world population, there are considerable concerns about the global resource use inefficiencies involved in the conversion on a mass scale of plant-based proteins into animal-based proteins. (FAIRR, <http://bit.ly/2u7W3lk>)

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

2000 character(s) maximum

- Economic opportunities - global meat substitutes market is expected to grow by 8.4% by 2020. Europe accounts for 39% of sales. (<http://bit.ly/2IDS4ET>)
- Key opportunity to promote sustainable healthy diets and their co-benefits. See more EUPHA (<http://bit.ly/2DcWawp>) and EPHA (<http://bit.ly/2mxiVGf>)
- Investor interest in protein transition – for example the Farm Animal Investment Risk and Return (FAIRR) initiative highlighting the opportunities of shifting from animal-based to plant-based protein production (<http://www.fairr.org>)

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

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