



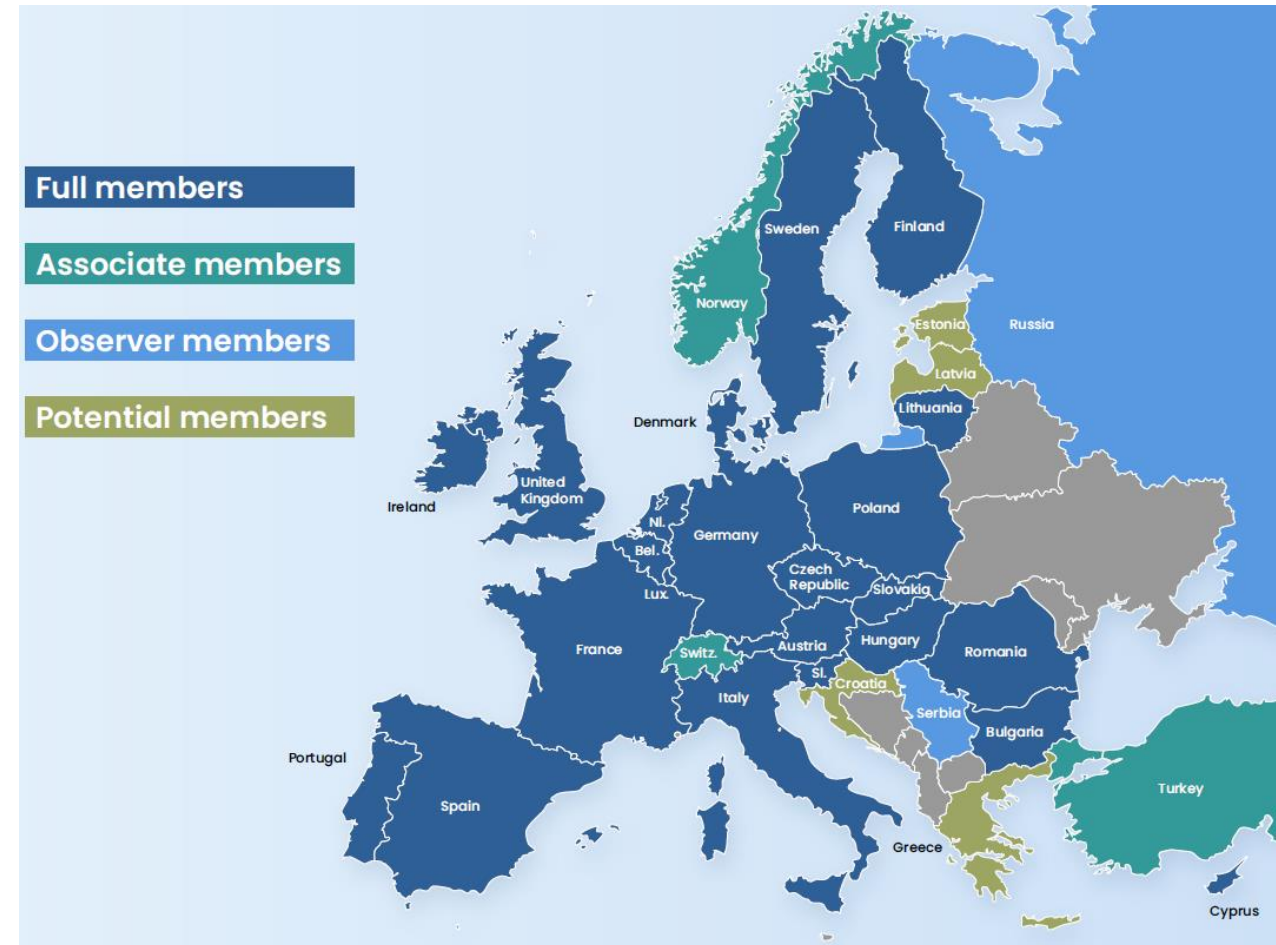
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European food security in the perspective of the Ukraine crisis and the role of livestock farming



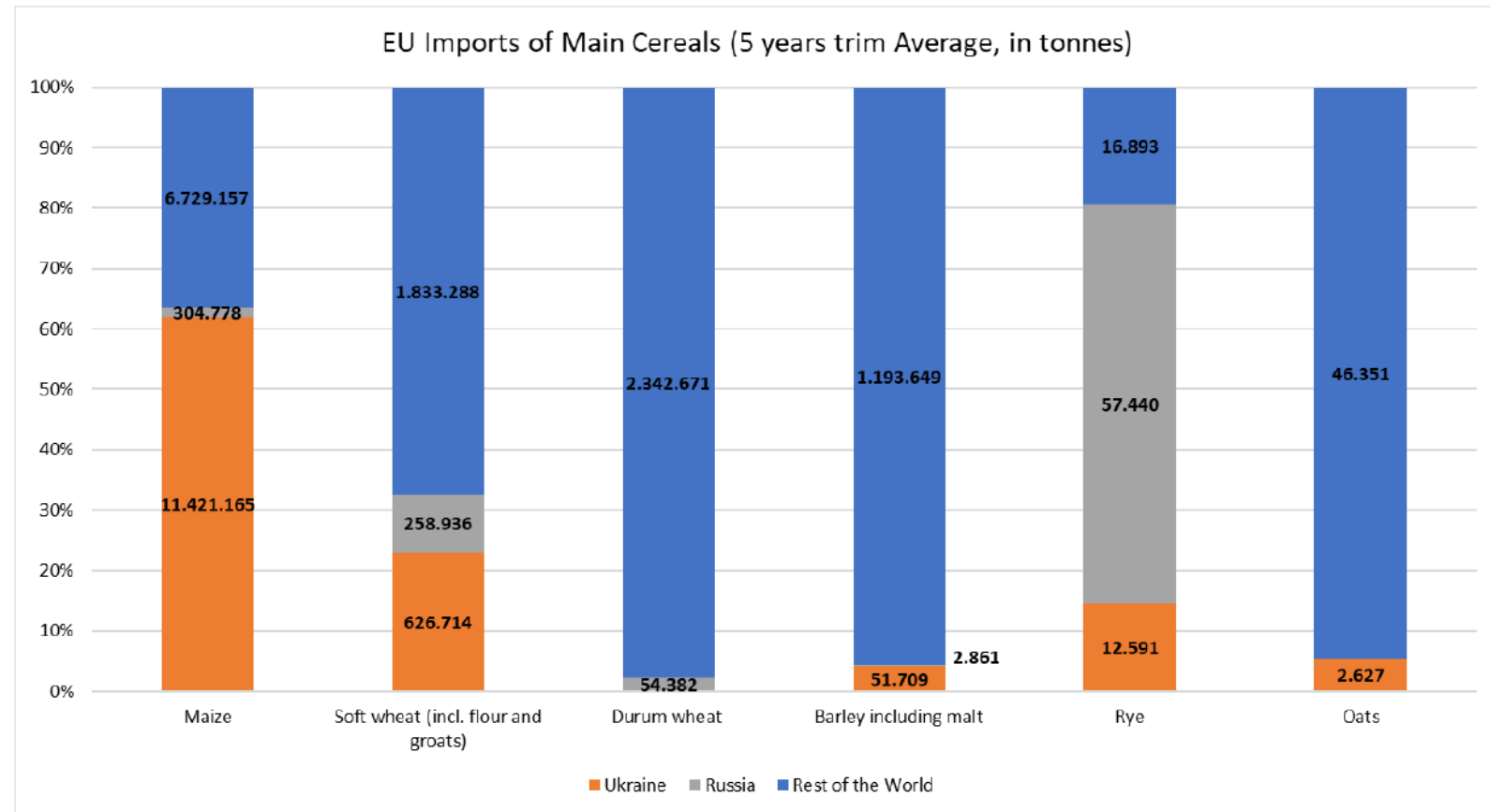
Who is FEFAC?

- European Association of Compound Feed Manufacturers
- Founded in 1959
- The EU+UK Industrial compound feed production in 2021: 150 mt.
- 7 committees



Direct and indirect food security impact of the war in Ukraine

- Gas and fertilizer prices at record levels with negative impact on yields
- Fuel prices pose a burden on farmers, fishers and food chain companies
- Production and export volume of wheat, maize and sunflowers in Ukraine unpredictable and probably much lower
- Export restrictions introduced by some Members States
- Food insecurity in besieged Ukrainian cities
- Higher import bill for food deficit countries
- Humanitarian needs and costs are likely to increase further and put additional pressure on humanitarian assistance



FEFAC actions during Russian re-invasion of the Ukraine

- Mobilizing a FEFAC TF emerging feed supply chain security threats, weekly calls in initial phase ,
- Communication with EU Institutions: virtual meetings (DG AGRI), exchanging letters (DG SANTE, DG AGRI, French EU Farm Council Presidency)
- Joint press release with COCERAL and FEDIOL
- Monitoring of the situation at feed mill level and providing info directly to European Commission,
- Monitoring market development (export restrictions, analysing the EU dependency...)
- Cooperation with other stakeholders (FEDIOL, COCERAL, COPA-COGECA, AVEC,)
- Creating MT channel for our members to get the latest information & witting a "wrap-ups" overview emails for our Members



The initial phase – end of february

- UKR exports about 60 mio tonnes of grain to the World
- The EU import on average 11 mio tonnes of corn
- Challenges:
 - 1) on the immediate need to enable the vessels that are loaded to sail – documentation by the country of origing, sanitary checks
 - 2) on the need to find alternative sources of supply in order to service their customers and ensure their processing plants continue to run – alternative destinations → compliance with the EU standards (GM, MLRs)
- Feed challenges:
 - Macro: sunflower seed oil
 - Micro: Dicalcium phosphate, Potassium Carbonate, urea, other specialty ingredients ($\text{Ca}_3(\text{PO}_4)_2$, KCl, BHT, CuSO_4)
 - Stocks monitoring: limited availability in PT, IT, ES, CY
 - Closure of feed mills in the South of Italy
 - 50% of maize use in the EU in certain regions (Hungary/Slovakia/Austria) is used by the ethanol producers

The EU crisis management measures

- FEFAC to safeguard essential feed supply, focus
 - 1) Short-term (until mid April, maize supply)
 - 2) Mid-term (up to end of MY, monitoring stocks - countries situation)
 - 3) Long-term (impact on the next MY – what of the UKR planting season?)
- Actively participating in the Commission established European Food Security Crisis preparedness and response Mechanism (EFSCM) expert group
- **The EU Communication: „Safeguarding food security and reinforcing the resilience of food systems“**
- Global support measures
 - Emergency package €500m
 - Humanitarian aid €93m
 - Emergency support programme €330m
- Support for EU farmers
 - €500 million (MS can complement up to 200% with national funds)
 - To address cash-flow
 - Market safety measures (PSA)
 - Set aside land (5mio ha)
 - Temporary Crises Framework for state aid

Safeguarding food security and reinforcing the resilience of food systems

- European agro-food sector plays an important role for the global geopolitical stability
- the EU is a considerable **net-importer** for feed protein, sunflower oil, seafood
- A well-functioning Single Market is the **bedrock** for EU food security and food safety, also in the current crisis.
- The Commission supports Member States in using possibilities to reduce the **blending proportion** of biofuels
- MS to communicate monthly **data of private stocks** of essential commodities for food and feed
- Deploying precision farming techniques and boosting EU plant protein production can be implemented rapidly on the ground but European farmers need accessing to varieties obtained by **new mutagenesis techniques** and alternative efficient plant protection products by speeding up the Commission's decisions making process.
- Reducing dependence on feed imports is part of the larger transformation of the EU food system, including a shift towards more plant-based diets and ensuring a more resilient and autonomous food system. In its Versailles declaration, **the European Council called for boosting EU plant protein production.**
- The Commission calls on Member States to also make use of other possibilities to support plant protein production, including dedicated sectoral interventions, as part of sustainable farming systems based on diversified feed sources. **The Commission will pay specific attention to protein crops in its summary assessment of the Member States' CAP Strategic Plans**

Increasing EU protein feed self-sufficiency?

ATF

21 April 2022

EU protein deficit: a long standing issue



Publication of Development of plant proteins in the EU

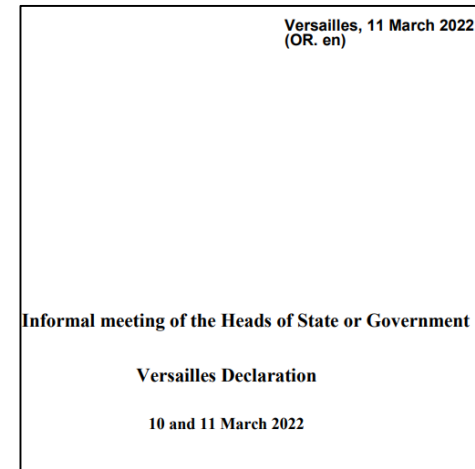
2017

May 2019

French protein plan

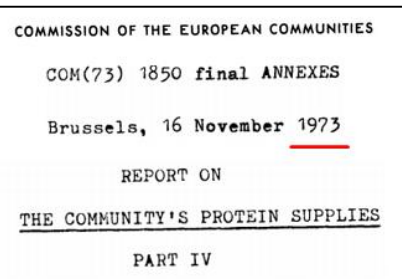


Flemish Protein plan



2021

2022



Nov 2018

Dec 2020



EU Protein Plan Announced by Commissioner Hogan at FEAC Congress June 2017

| EU Feed Protein Balance Sheet | | | | | | | | | | | |
|-------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| 2018/19 | | | | | | | | | | | |
| Production | | | | | | | | | | | |
| Country | 2018/19 | 2017/18 | 2016/17 | 2015/16 | 2014/15 | 2013/14 | 2012/13 | 2011/12 | 2010/11 | 2009/10 | 2008/09 |
| Belgium | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Bulgaria | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Croatia | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Cyprus | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Czechia | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Denmark | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Germany | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Greece | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| France | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Spain | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Italy | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Lithuania | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Luxembourg | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Hungary | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Malta | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Netherlands | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Poland | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Portugal | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Romania | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Slovakia | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Slovenia | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Sweden | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Turkey | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Ukraine | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| EU28 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 | 100 |

Commission publishes the first EU feed balance sheet providing an overview of EU feed supply



Dutch protein plan

National feed balance sheets: DE, DK

COPA & COGECA, FEFAC and EUROSEEDS

- Call for a set of measures with the aim of increasing the domestic protein production to reduce dependency on imports, increase diversity in crop use and lower carbon footprint:
 - to provide a consistent EU framework enabling European protein value chains' competitiveness
 - to provide meaningful and long-term incentive 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 a balanced diet that include plant protein-based food

Lessons learned from protectionist measures taken in the era of pandemic and war to ensure feed and food security

Covid lessons learned

- Importance of fully functioning EU single market
- Global trade open (G20 declaration)
- Improvement of the coordination of the EU and national risk mitigation measures

The UKR crises

- Immediate response to prevent disruptions of feed and food chain in the EU and outside (north Africa) and tackling the logistic challenge
- Focus on increasing productivity of the EU farming
 - The EU joining the US coalition for Sustainable Productivity Growth (SPG)
- Improved risk preparedness measures and information exchange (EFSMC)

FEFAC recommendations on food security

- Maintaining single market is a key
- Open access to International market is key to competitiveness as EU protein challenge will persist
- Potential of the new genomic techniques
- Minimise the risk of renationalization
- National Strategic Plans (at least 19 countries set to provide 'coupled support' for protein crops in the CAP Strategic Plans (2023-2027) and EU-CAP- measures: Support measures to increase the protein crop production and the processing of protein crops in the EU (eco-schemes, voluntary coupled support, R&D)
- Policy coherence between CAP and other relevant EU policies (e.g. RED II, the Green Deal framework)
- NGTs: Could the plant breeding sector deliver functional traits that improve feed quality of soy and other protein crops?

Thank you for your attention



@FEFAC_EU

