

Environmental measures and strategies of the EU affecting the grain grower's activities in light of current security situation

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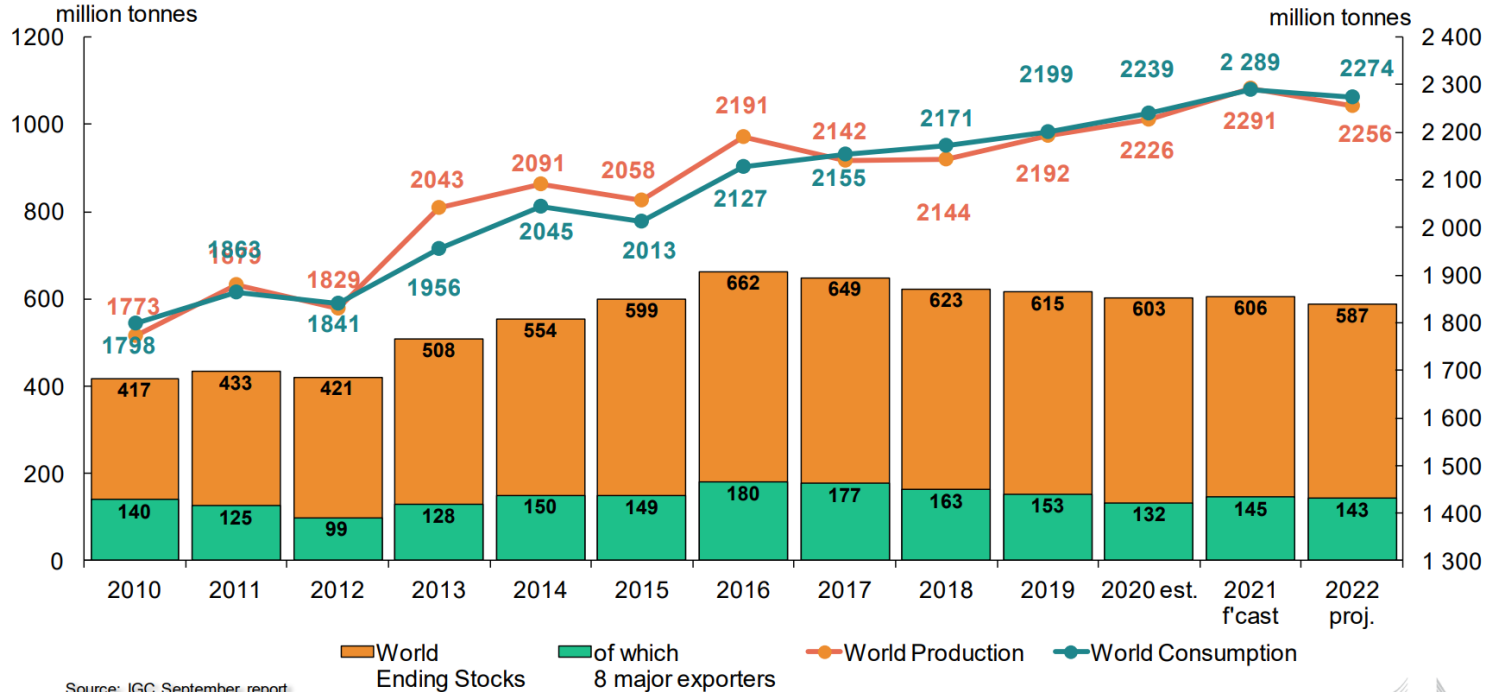




Uncertainties have been increasing for years...



World cereals: IGC



Source: IGC September report



EU-27 2022/23 Cereals

(million ha)

	2021/22	2022/23		
		August Projection	Sept. Projection	vs. 2021/22 (%)
Soft wheat	21.7	21.9	22.0	1.4
Durum wheat	2.2	2.1	2.2	-0.6
Barley	10.3	10.4	10.5	1.6
Maize	9.2	9.0	8.7	-5.9
Rye	1.9	1.8	1.8	-6.6
Oats	2.6	2.5	2.4	-5.7
Total	52.0	51.2	51.3	-1.4

Source: DG AGRI - E4

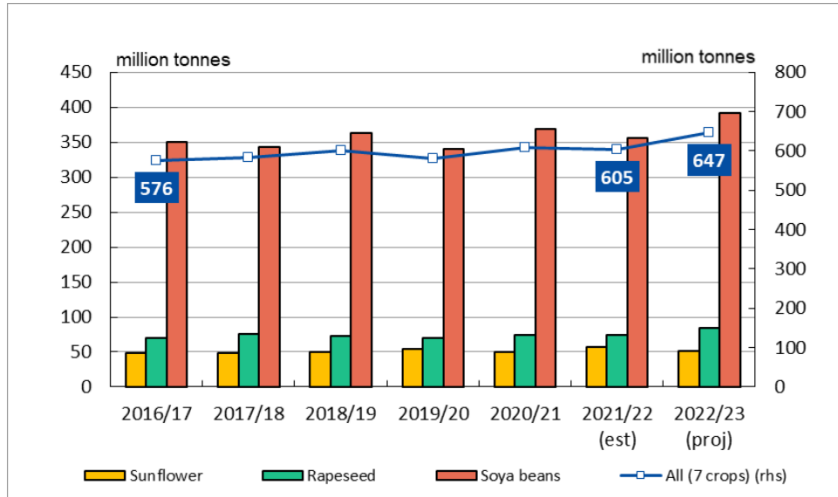
(million tonnes)

	2021/22	2022/23		
		August Projection	Sept. Projection	vs. 2021/22 (%)
Soft wheat	130.1	126.0	127.0	-2.4
Durum wheat	7.7	7.1	7.4	-4.9
Barley	52.0	50.4	51.5	-1.0
Maize	72.7	59.3	55.5	-23.7
Rye	7.8	7.4	7.5	-4.0
Oats	7.5	7.6	7.6	1.9
Total	293.8	272.7	270.9	-7.8

Source: DG AGRI - E4



2022/23 World Oilseeds (USDA)



22/23 outlook (changes y/y):

- Total Oilseeds:** 647 mt (+42) ↑
- Soya beans: 391 mt ↑
 - Rapeseed: 84 mt ↑
 - Sunflower: 52 mt ↓

EU-27 2022/23 Oilseeds

EU OILSEEDS AREA

(million hectares)

	5-year trimmed average	2021/22	September	2022/23 vs. 2021/22 (%)	vs. 5-y AVG (%)
Rapeseed	5.61	5.33	5.94	11.5	5.8
Sunflower	4.33	4.35	5.10	17.4	17.8
Soya Beans	0.95	0.94	1.12	18.8	18.1
TOTAL	10.89	10.61	12.15	14.6	11.6

EU OILSEEDS PRODUCTION

(million tonnes)

	5-year trimmed average	2021/22	September	2022/23 vs. 2021/22 (%)	vs. 5-y AVG (%)
Rapeseed	17.23	17.00	19.28	13.4	11.9
Sunflower	10.18	10.34	10.27	-0.7	0.8
Soya Beans	2.69	2.66	2.70	1.5	0.2
TOTAL	30.11	29.99	32.24	7.5	7.1

Sources : EC - DG AGRI.



Summary of the IGC Grain Market Report

(GMR 536 of 22/09/2022)

Outlook for 2022/23

Production and Export Forecasts for Ukraine (million tonnes)

Production (m t)	2019/20	2020/21	2021/22	2022/23	y/y %
Wheat	29.2	25.4	33.0	21.5	-35.0
Maize	35.9	30.3	42.1	29.2	-30.7
Barley	9.5	7.9	10.0	6.5	-34.7
Exports (m t; Jul/Jun)					
Wheat	21.0	16.8	18.9	13.0	-31.2
Maize	30.4	23.1	23.7	17.0	-28.3
Barley	5.0	4.2	5.8	1.8	-69.6
Production (m t)					
Rapeseed	3.5	2.6	2.9	3.0	+2.5
Soya beans	3.7	2.8	3.4	3.6	+4.1
SFS	16.5	13.1	16.4	10.5	-35.9
Exports (m t; Oct/Sep)					
Rapeseed	2.5	2.5	2.4	2.4	-1.5
Soya beans	2.4	1.4	1.5	1.5	+0.0
SFS	0.06	0.2	1.7	1.2	-31.5

Ongoing processes in the EU



- **European Green Deal**



Ongoing processes in the EU



- **Green Deal**
 - **Farm to fork**
 - **Biodiversity strategy**

The overarching aim of the European Green Deal is for the European Union to become the world's first “climate-neutral bloc” by 2050. It has goals extending to many different sectors, including construction, biodiversity, energy, transport and food.



Ongoing processes in the EU



- **Green Deal**

- **Farm to fork**

- **Biodiversity strategy**

Biggest impact on the arable farmer:

- Reduction targets for fertilizer 20% and nutrient losses 50%
- Reduction targets for plant protection products 50%
- Goal for organic production 25%
- Protect 30% of land and 30% of sea
- Restore natural habitats
- Carbon farming
- Reverse the decline of pollinators



Ongoing processes in the EU



- **Reduction targets for fertilizer 20% and nutrient losses 50%**
 - Goal achieved by 2030
 - CAP Strategic plans
 - Impact of the skyrocket high prices for mineral fertilizer?
 - CopaCogeca urges the Commission to take necessary action to reduce the impact from the war in Ukraine
 - Impact assessments shows decrease in production!



Ongoing processes in the EU



- **Reduction targets for plant production products 50%**
 - Goal achieved by 2030
 - CAP strategic plans
 - SUR – Sustainable use regulation
 - Mandatory reduction targets for all countries 35 – 65%
 - Ban on all PPP's in sensitive areas
 - Higher demands on documentation
 - Glyphosate renewal
 - Need for better impact assessments!



Ongoing processes in the EU



- **Goal for organic production 25%**
 - Goal achieved by 2030
 - CAP strategic plans



Ongoing processes in the EU



- **Protect of land and sea 30% - restore natural habitats**
 - Several initiatives
 - Nature Restoration targets
 - Protection of forests
 - Rewetting of peatland
 - Restoring pastures
 - CAP strategic plans – Gaec, investment support etc.





