



From dependency to diversity

A strategic scenario analysis
on reducing Europe's soy import
dependency by 2035

June 2026

Executive summary

The world has entered a period of acute geopolitical uncertainty, and Europe has responded with urgency. While it has acted on energy, defence and critical raw material supply chains, food security has remained largely absent from the wider resilience and preparedness agenda. This is a gap increasingly hard to justify. The EU's food system carries dependencies every bit as concentrated as those in energy or critical materials, and any disruption would deepen the affordability challenges many households already face today.

Soy is one of the most acute vulnerabilities. The EU imports roughly 91% of the soy protein it consumes, and sources the overwhelming majority from

just three countries: Brazil, the United States and Argentina. Soy is the protein backbone of European livestock farming, and this concentration therefore has significant implications for the entire sector. Without access to imported high-protein meal, the EU would lose up to 40% of its livestock production capacity, with the steepest losses in pork, poultry and eggs. Soy disruption is not a hypothetical risk. In 1973, the United States abruptly embargoed soybean exports, jolting global markets and pushing other importers to secure their own supply. Europe did not, and half a century later the same concentration of dependency persists in a far more volatile world. The question today is whether Europe would be prepared when such a shock recurs.



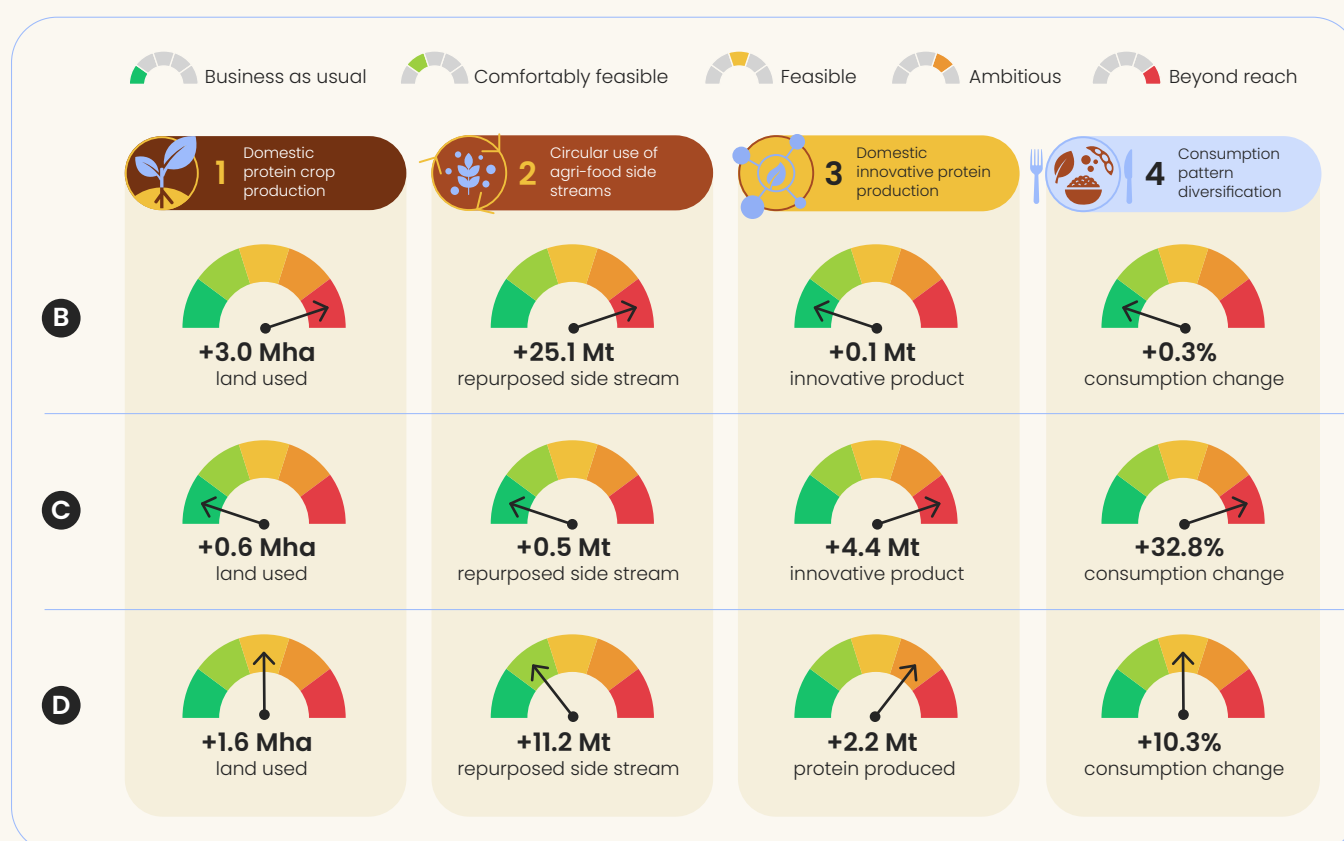
Preparing for disruption is both possible and necessary, with protein diversification as a key lever to reduce our dependence on imported soy.

This report sets out four practical strategies that span the full value chain to reduce that dependency. The first expands European protein crop production, growing more legumes and protein crops for feed and food. The second optimises circular feedstock use, redirecting safe, protein-rich agri-food side streams back into the food and feed system. The third scales innovative protein production, using biotechnologies such as advanced fermentation to add new protein that needs no soy. The fourth diversifies protein consumption, broadening the mix of protein sources across European diets. Three strategies act on supply and one on demand.

To test how best to combine these strategies, the report models four scenarios against a set target: a 20% reduction in soy protein imports by 2035, equivalent to 3 Mt of protein. Scenario A is a business-as-usual baseline, reflecting current trends without additional intervention. It falls short of any meaningful import reduction, nor does it offer relief

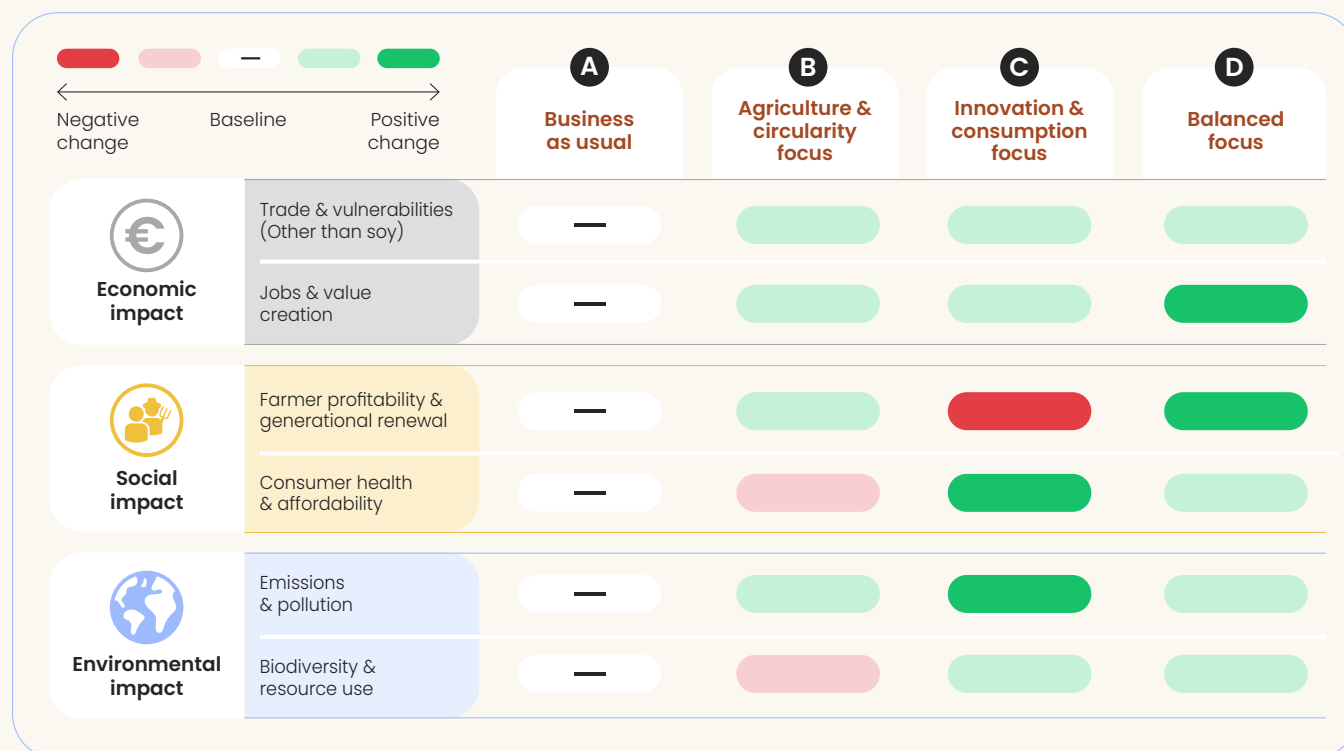
for the societal and economic challenges the EU already faces today. Scenario B concentrates effort on agriculture and circularity, Scenario C on innovation and consumption, and Scenario D spreads effort in a balanced way across all four strategies. Each of the three active scenarios is modelled towards the same soy import reduction target of 20%, with a subsequent analysis exploring which pathway is most realistic and delivers the greatest systemic benefits.

Scenario D, the balanced path, proves the most feasible. Every strategy rests on levers with real-world limits: the land that can be turned over to protein crops, the agri-food side streams that can be safely repurposed for food and feed, the realistic growth of innovative protein production capacity, and the dietary change that can actually be sustained. Scenarios B and C hit the target only by pushing one or two of these levers beyond reach. The balanced scenario, however, reaches the same target with every lever working comfortably within its limits and no single strategy overburdened.



Feasibility is not its only strength. Weighed across social, economic and environmental impacts, the balanced scenario also delivers the broadest benefits with the fewest trade-offs. The concentrated paths, B and C, tend to lead to progress in

one area at a cost in another, while scenario D secures gains across the board. It turns protein diversification from a series of hard compromises into a positive outcome for the food system as a whole.



Much of this advantage comes from synergies across the four strategies. They reinforce one another along the value chain: demand-side measures build the market that justifies investment in protein crops and processing, the side streams collected for circular use can be used as feedstock for fermentation, and innovative proteins complement legumes rather than compete with them.

A balanced approach also makes the best use of the diversity of Europe. It lets each region lean into its own strengths, from established protein crop areas to mature biotech and fermentation capacity, without asking every Member State to pursue all pathways at the same pace.

Capturing the gains identified in this report calls for coordinated policy across all four strategies, and therefore across the full value chain — from research and farming through processing and markets to consumption. This starts with strong coordination across the institutions that govern them. Cross-DG orchestration and coherent policy direction are the immediate priorities, both of

which the upcoming Comprehensive Protein Plan is well placed to deliver. Concrete measures should be further anchored in the wider set of policies now under negotiation. The post-2027 CAP, the CMO, the National and Regional Partnership Plans, the European Competitiveness Fund and FP10 all move forward simultaneously, creating a unique policy window for Europe to seize.

For half a century, Europe has treated its dependence on imported soy as a settled fact of modern agriculture. It does not have to be. The strategies are feasible, the benefits are consistent and shared across farmers, industry and society, and the policy moment has arrived. Protein diversification embraces the full breadth of what European food and farming can offer, and is a strategic investment in Europe's resilience, its farmers and its food security. The EU's food story reached a pivotal chapter, and the choices made now will shape the continent's trajectory for a generation. **The direction is clear, and Europe has everything it needs to move. From dependency to diversity.**

About this report

This report was developed and produced by The Protein Project, led by co-authors Jasper Zwinkels, Katrien Martens and Marin Vandamme.

Jasper Zwinkels holds a PhD from Wageningen University and conducted this research as a visiting fellow at The Protein Project. His fellowship was made possible through the in-kind support of the School for Moral Ambition and #SustainablePublicAffairs. Neither organisation had any influence over the research design, analysis or conclusions, which remain solely those of the authors and The Protein Project.

The report benefited from the expertise and critical review of a diverse group of researchers and experts from across the ecosystem. We are grateful for their input as it strengthened the analysis at every stage. A full list of contributors is included in the acknowledgements.

Its findings were further tested and refined through a dedicated roundtable convened in Brussels in May 2026, bringing together senior officials from across European Commission services, Member State representatives and national champion organisations from across the EU. The session was held under Chatham House Rules, and the exchanges that followed contextualised the analysis and helped to refine the policy directions set out in this report.

This research was enriched by experts and reviewers from:





Beyond the gridlock, a new protein path.

In a world that tries to force us into siloes,
we choose a different way.

We believe the best solutions bring together
everyone's strengths.

The wisdom of farmers.

The foresight of Europe's brightest minds.

The abundance unlocked by new technologies.

We see a future where farmers thrive, consumers
enjoy better food, businesses grow responsibly,
and our planet heals.

This future is only possible when we transcend
the boundaries that have kept us apart.

That's why we bring together voices that
rarely share the same table.

We prefer uncomfortable coalitions
over partisanship.

Pragmatic steps over waiting for perfection.

Grounded research over wishful thinking.

And we start from what's possible, instead
of what's wrong.

Because the challenges we face are too
important for half-measures and because the
opportunities ahead are too valuable to miss.

Bridging divides, building futures.

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