



From dependency to diversity

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

June 2026



The European Union produces only 9% of the soy protein it consumes, and changing that number is complicated. In TABLE's work on soy and protein systems, we consistently encounter a polarised debate. Nutritionists see a diet problem, farmers a livelihood problem, environmentalists a deforestation problem, while economists bring perspectives on competitiveness and trade. Policymakers, meanwhile, are confronted with all of these challenges simultaneously but lack a shared basis for action in a highly fragmented policy landscape. The result is a status quo that satisfies few and has left Europe genuinely exposed—geopolitically, environmentally and economically.

This timely report from The Protein Project helps reframe that debate, arguing that Europe's dependence on imported soy should be understood as a strategic vulnerability deserving the same seriousness Europe has brought to energy and defence. The report's strength lies in its analytical breadth. It confronts policy fragmentation directly, resists the temptation to champion any single pathway, and grounds its recommendations in a rigorous assessment of what is feasible across different Member States and sectors. At TABLE, we work to make evidence and trade-offs in food systems more accessible and honest, and it is encouraging to see this report advancing exactly that goal in a European policy context.

Matthew Kessler

Research coordinator "Rethinking the soy dilemma" at TABLE

A collaboration between the University of Oxford, Swedish University of Agricultural Sciences, Wageningen University and Research, Universidad de los Andes, and la Universidad Nacional Autónoma de México.

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Technical appendix available for download at:
www.theproteinproject.eu/publications/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:



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.



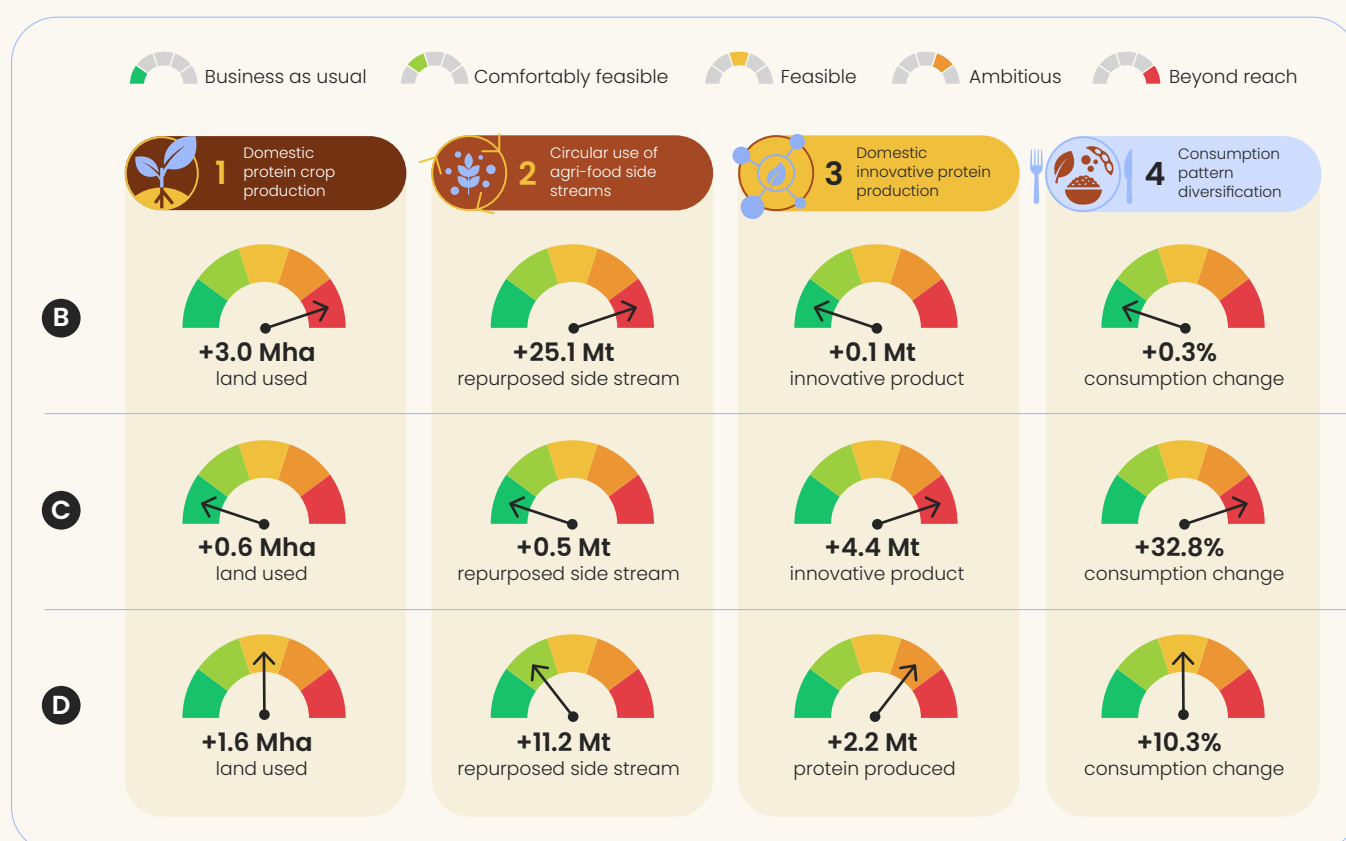
Preparing for disruption is both possible and necessary, with protein diversification as a key lever to reduce our dependence on imported soy.

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

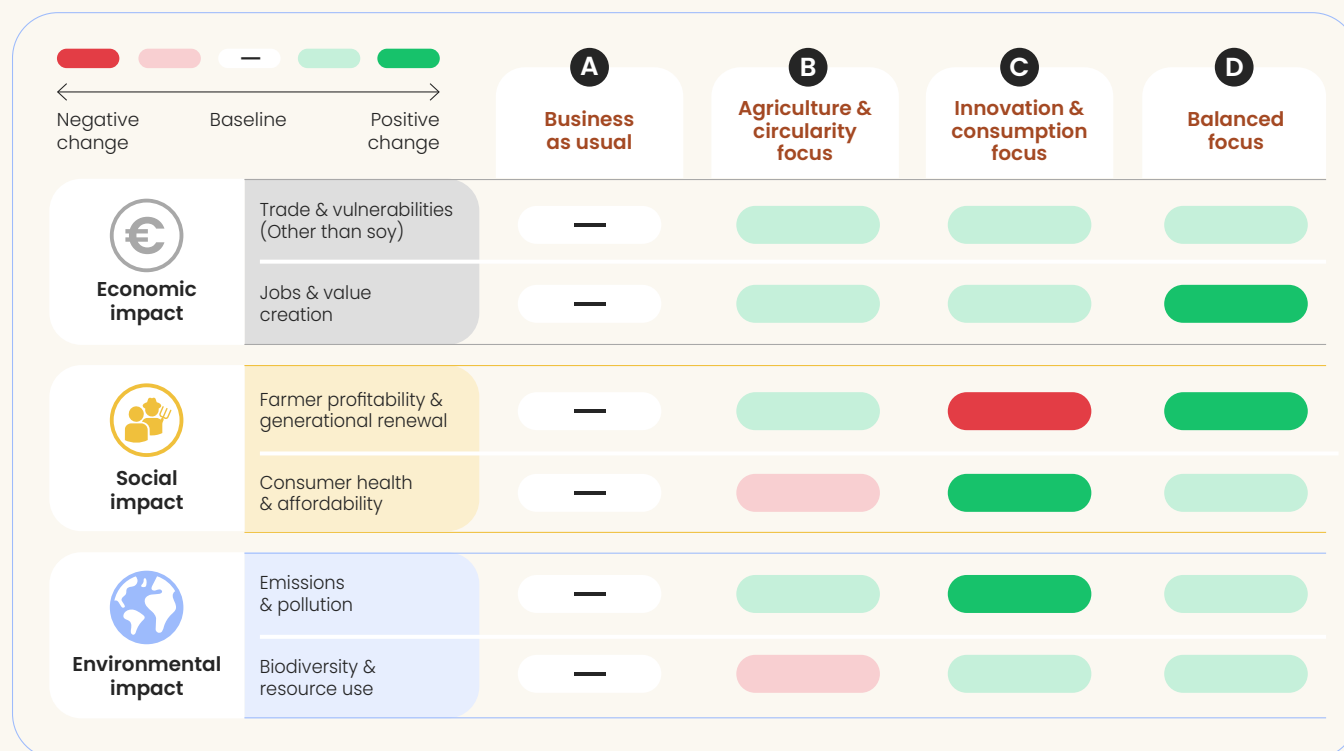
for the societal and economic challenges the EU already faces today. Scenario B concentrates effort on agriculture and circularity, Scenario C on innovation and consumption, and Scenario D spreads effort in a balanced way across all four strategies. Each of the three active scenarios is modelled towards 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.**

1. Setting the Scene

Defence, security & the blind spot of food

The world has entered a period of deepening geopolitical instability. Armed conflicts are multiplying, from the ongoing war in Ukraine to escalating tensions in the Middle East and the Indo-Pacific. Power structures that defined the post-Cold War order are shifting: the United States is recalibrating its global commitments, China is asserting its influence across trade and technology, and authoritarian states are increasingly willing to weaponise economic interdependencies. Europe finds itself in the midst of these shifts at a moment when the stability of the international order it helped shape and long relied upon can no longer be assumed.

And Europe is responding. Rooted in the recognition that unaddressed dependencies may become critical vulnerabilities in times of crisis, communications such as the ReArm Europe Plan (1) and the EU Preparedness Union Strategy (2), both released in early 2025, reflect a serious commitment to improving resilience across defence, energy and technology supply chains. Across all three domains, the response logic is the same: identify the dependency, assess the risk of disruption, diversify supply, build domestic capacity, and act before disruption requires costly improvisation.

Yet one domain remains largely absent from the EU's response and prioritised political agenda: food — a gap increasingly hard to justify. Reliable access to food is a precondition for the societal resilience that defence preparedness ultimately rests on. Well-nourished, food-secure populations underpin defence mobilisation and foster social stability at times of crisis, a position NATO has formally affirmed in the context of resilience and civil preparedness, and reinforced through its lessons from the war in Ukraine. Yet food security extends beyond crisis preparedness (3–5). The FAO defines food security as existing when all people, at all times, have physical and economic access to

sufficient, safe and nutritious food (6). While physical access to food is primarily a crisis-time risk, concerns around economic access to food and its affordability are already a pressing reality for many EU households today. In the second half of 2025, affordability topped the European Commission's ranking of the most relevant EU food security risks (7), reflecting statistics showing nearly one in ten EU citizens struggled to afford a proper meal every other day in recent years (8).

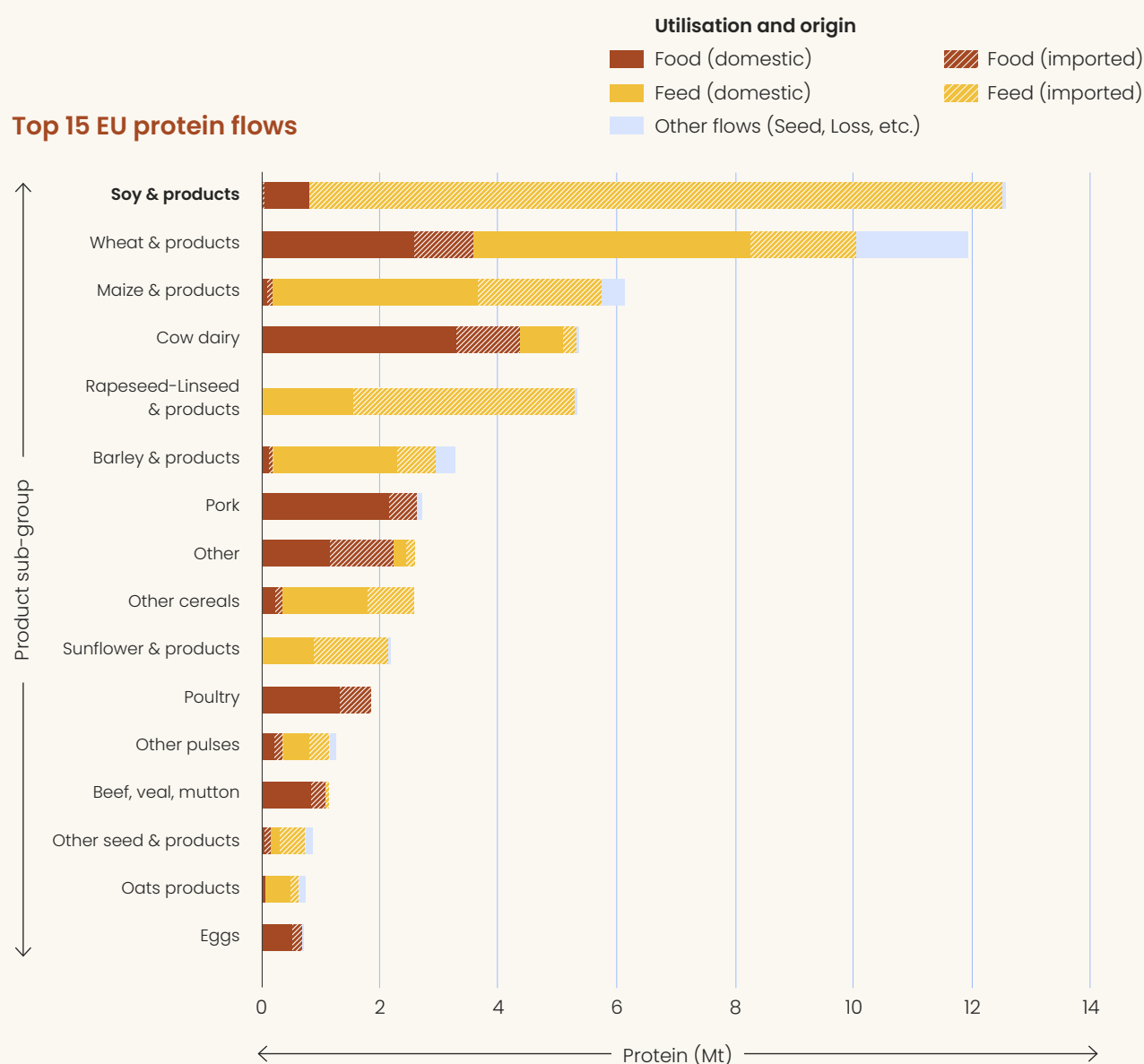
At the same time, food supply chains are deeply interconnected and far from immune to geopolitical disruption. They depend on shipping routes, energy, fertilisers, imported feed materials and functioning logistics. Two recent examples illustrate how rapidly this can unfold. When Russia's invasion of Ukraine blocked Black Sea export routes in 2022, nearly 25 million tonnes of grain were trapped in the country, wheat prices on European futures markets spiked by 58% within weeks, and sunflower oil disappeared from supermarket shelves across Europe (9). The sharpest consequences, however, unfolded elsewhere. Across the Middle East, Northern Africa and sub-Saharan Africa, where many countries source the majority of their wheat from the Black Sea region, the disruption translated directly into acute food insecurity. More recently, the disruption to the Strait of Hormuz in early 2026 demonstrated how quickly food systems can be hit through energy and fertiliser channels even when no major food-exporting country is directly involved. Shipping through the Strait fell by more than 70%, pushing urea prices up by 19% within a week, with direct implications for agricultural production costs and food prices across importing regions (10,11).

While some parts of the EU's institutional landscape — notably DG AGRI — increasingly recognise this tension, food security still lacks the coherent, cross-cutting policy priority and response that this strategic reality demands.

The EU's main food vulnerability: Soy as a case study

This report focuses on one of the most critical vulnerabilities in the EU's food system: dependencies characterised by low self-sufficiency and a highly concentrated supplier base. On both counts, soy stands out as an extreme outlier.

Figure 1: EU protein flows by sub-group, highlighting both origin and utilisation. Own modelling based on FAOSTAT Food Balance Sheet data (2023). For methodology and classification notes, see Appendix.



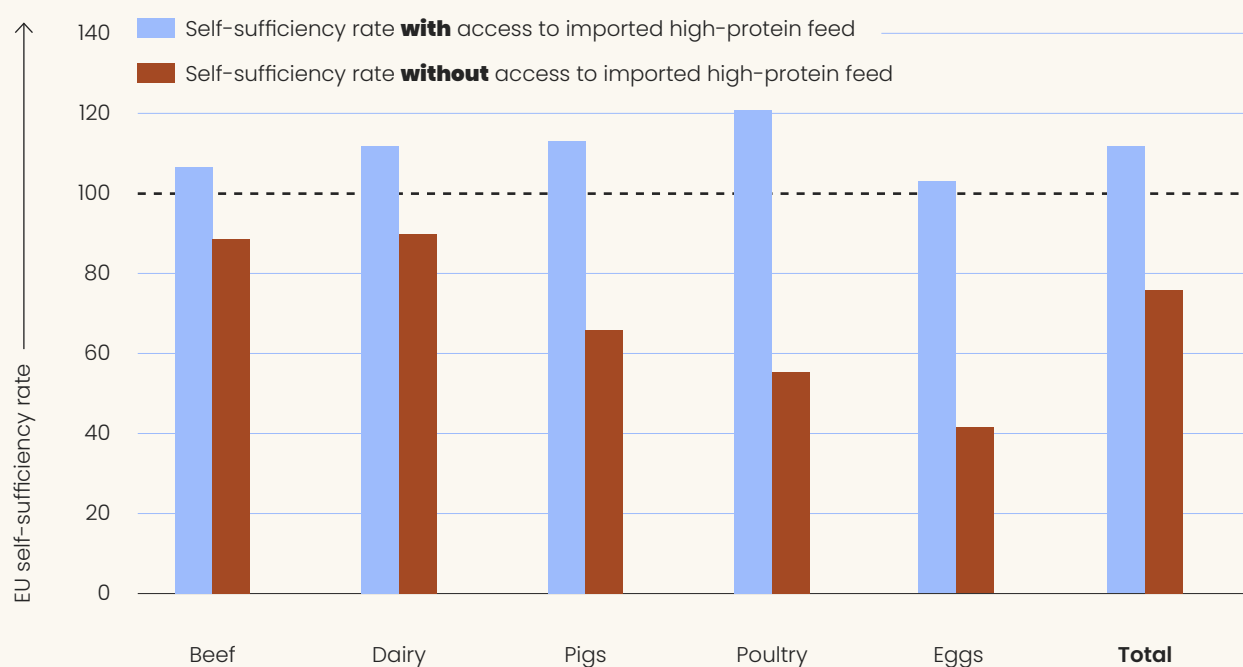
The EU's dependency on imported soy is structural and severe. Soy enters the EU food system through two channels: animal feed, which accounts for the vast majority (around 90%) of use, and food products such as tofu, soy drinks and processed foods. Overall, the EU produces only 9% of the soy protein it consumes, and the exposure is even sharper in the feed segment. The EU is broadly self-sufficient in roughage and reasonably strong in some other feed sources, yet critically exposed in high-protein feed materials. Soybean meal – the single most important high-protein feed ingredient accounting for 11.8 million tonnes of crude protein use – has a domestic self-sufficiency rate of just 4%, with 96% imported from outside the EU (12).

That dependency is not only substantial, but also highly concentrated, compounding the strategic risk. Brazil, Argentina and the United States together supply 86% of all EU soy imports (13). Geographically clustered and exposed to the same climate, political and trade pressures, this narrow supplier base leaves the EU with very little room for manoeuvre if any one of those flows is disrupted.

Soy is far from a niche commodity affecting only those who regularly eat tofu or drink soy milk.

An average EU citizen consumes 60.6 kg of soy per year, of which an estimated 55 kg is consumed indirectly, embedded in the meat, dairy and eggs on their plate (13). That consumption depends almost entirely on imported soy meal flowing through Europe's livestock system, particularly in pig and poultry production. Figure 2 below puts the EU livestock sector's exposure to high-protein meal imports in concrete terms.

Figure 2: EU self sufficiency rates (SSRs) of a range of livestock products with (blue) and without (orange) access to high-protein feed from third countries. Own modelling based on FAOSTAT Food Balance Sheet data (2023). For methodology and classification notes, see Appendix.



“Without access to imported high-protein meal, the EU would lose approximately 40% of its total livestock production capacity.”

EU self-sufficiency in animal products appears strong on paper — above 100% across beef, dairy, pork, poultry and eggs. Once feed dependency is factored in, however, that picture changes dramatically. Without access to imported high-protein meal, the EU would lose an estimated 15% of its beef and dairy production, around 40% of its pork production, and up to 60% of its poultry and egg production.

Soy's strategic significance extends beyond its supply vulnerability. Questions around pesticide use, GMO versus non-GMO supply chains, unfair trading practices and deforestation are connected to soy supply chains. These dimensions are not the core focus of this report, but they demonstrate that soy sits at the intersection of strategic autonomy, agricultural resilience and environmental exposure — and warrants serious policy attention.

The Soy Shock scenario: stress-testing EU preparedness

This report therefore starts from a practical resilience question: what would happen if access to a meaningful share of EU soy imports were disrupted? The modelled scenarios test the EU's ability to absorb a 20% reduction by 2035 under different conditions and examine what a series of deliberate protein diversification strategies could realistically achieve over the coming decade.

History shows that a substantial soy supply disruption is not a hypothetical risk. In 1973, an exceptional drought in the United States prompted a temporary embargo on soybean exports, cutting off supply to importing nations almost overnight

and triggering feed shortages across Europe and Japan (14) (Copess J. 2019). This event was an early reminder that climate shocks combined with geopolitical decisions can disrupt supply with little warning. Half a century later, escalations of the war in Ukraine demonstrated once more how food systems can get disrupted through indirect routes: Brazilian fertiliser imports — largely sourced from Russia and Belarus — became more expensive almost immediately, raising soy production costs and pushing up feed prices across the EU (15,16). The 2025 US-China trade dispute illustrated a third pathway, showing how rapidly soy flows can be redirected through geopolitical rivalry between major trading powers. China's shift away from US soybeans towards South American supply reshuffled global trade patterns within weeks (17,18). With geopolitical and climate pressures increasingly affecting the regions the EU depends on most for its soy supply, further disruption is a foreseeable risk.

This report examines the role of protein diversification in reducing the EU's exposure to imported soy and strengthening its strategic autonomy.

It tests whether and how four complementary strategies, each examined in depth in the chapters that follow, could help the EU build the resilience needed to withstand a 20% soy import disruption: domestic protein crop production, circular feed, innovative protein production and consumption pattern diversification. Rather than full autonomy from global trade, the aim is preparedness. Protein diversification is treated as a cornerstone of a broader resilience strategy that should encompass parallel measures such as trade diversification, strategic storage and stronger

A policy window Europe should not miss

Food security was a founding concern of EU integration, rooted in the memory of wartime hunger, but that urgency faded as stability returned in the decades that followed. Today, it has re-emerged on the EU agenda in new forms. Recurring geopolitical and trade disputes, EU-wide farmer protests over resilience of the livestock sector and fair returns, and food price volatility affecting consumer affordability have all contributed to renewed attention.

Other major powers have moved further and are putting food and protein at the forefront of their defence and preparedness agendas. China's 15th Five-Year Plan is the clearest expression of this shift, explicitly designating soy import reduction as a strategic objective (19). With the recent adoption of the Fertiliser Action Plan (20), the EU has shown it can move decisively on food security

vulnerabilities, yet on protein, that response is still outstanding.

Fortunately, a unique policy window is now open.

The EU's Comprehensive Protein Plan, expected shortly, offers the clearest opportunity to orchestrate a comparable end-to-end response. Alongside it, the post-2027 CAP reform, the Livestock Strategy, the Biotech Acts, public procurement reform and the Multiannual Financial Framework are all on the table simultaneously and span both food production and consumption. **Together, they represent a once-in-a-decade opportunity to turn food and protein security ambitions into structural policy action.**

The analysis performed for this publication is designed to inform exactly that opportunity, offering a concrete, evidence-based picture of what different combinations of policy choices could realistically deliver over the coming decade.



2. Four leading protein diversification strategies

The scenarios modelled in this report rest on four complementary protein diversification strategies, each targeting a distinct lever in the EU's food and feed system. Together, they represent the main pathways through which the EU could meaningfully reduce its dependence on imported

soy, and form the building blocks for targeted policy support. Three of the four strategies reduce soy import dependency by expanding domestic protein supply, while the fourth acts on the demand side, diversifying protein choices across EU diets.

Figure 3: Overview of the four protein diversification strategies identified in this study.

$$\text{Soy Import} \propto \text{EU protein demand} - \text{EU protein supply}$$

Increased EU protein supply



1 Domestic protein crop production



2 Circular use of agri-food side streams



3 Domestic innovative protein production

Reduced Soy Import

Reduced EU protein demand



4 Consumption pattern diversification

Each strategy is described in more detail on the next page, including the key assumptions that underpin the modelling.



1

**Domestic
protein crop
production**

Strategy 1

Protein crop cultivation is expanded across EU arable land through intercropping, diversified crop rotations, or tighter rotation cycles. These approaches aim to increase the productive use of existing land while limiting displacement of current crop production. The protein harvested from these crops can replace imported soy in both feed and food markets.



2

**Circular use
of agri-food
side streams**

Strategy 2

Protein-rich by-products and waste streams from across multiple stages of the agri-food supply chain — from post-harvest and processing through to distribution and consumption — are increasingly looped back into the production cycle, primarily as feed ingredients. This results in a more efficient use of protein already present in the EU food chain, reducing the volume of soy that needs to be imported¹.



3

**Domestic innovative
protein production**

Strategy 3

Innovative biotechnologies, such as biomass and precision fermentation, are scaled up to produce additional protein for the EU market without requiring soy as an input. When used as feed ingredients, they can directly replace soy meal in animal diets; when used as food, they complement existing protein sources, reducing overall demand for soy-based feed.



4

**Consumption
pattern
diversification**

Strategy 4

By broadening EU diets to a wider range of plant-based foods, particularly legumes, and innovative proteins, this strategy reduces the share of protein that depends on soy-based feed. Total per capita protein intake is assumed to remain stable, with plant-based and innovative proteins accounting for an increased portion of overall consumption, and animal protein consumption moderating accordingly.

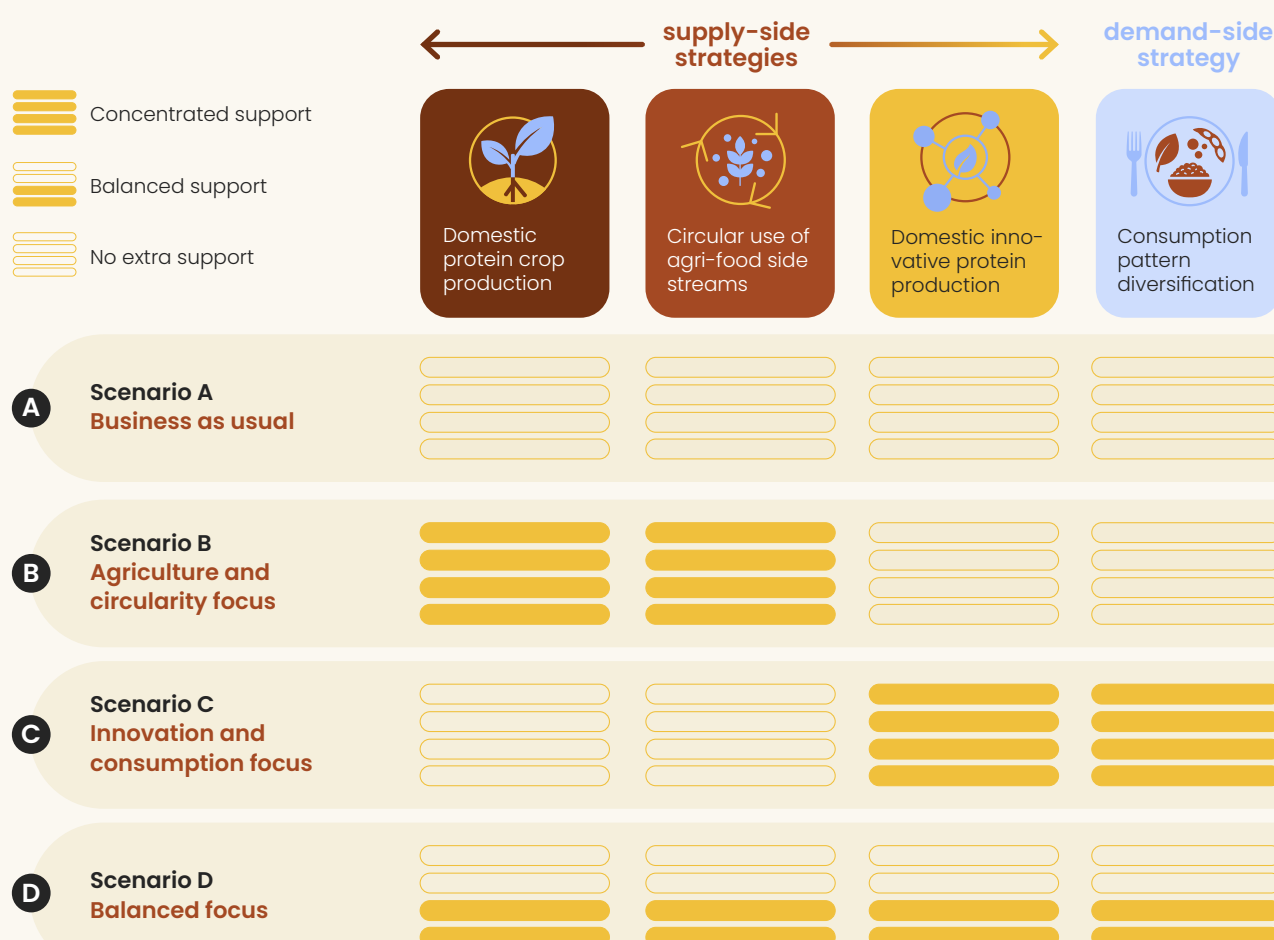
¹ Food waste reduction across the chain — particularly at retail and consumption level — is a significant lever for protein efficiency in its own right, but is not captured here: it reduces demand rather than redirecting supply, and sits outside the scope of protein diversification as defined in this report.

3. A glimpse of the EU in 2035

Building on the four strategies introduced above, this study models four policy scenarios to assess how different combinations of policy support could realistically reduce the EU's soy import dependency by 2035. The starting point is a business-as-usual baseline (Scenario A), reflecting current policy trajectories without additional intervention. The three scenarios that follow each

represent a distinct policy pathway towards the target of a 20% reduction in EU soy imports by 2035, varying in how policy support is distributed across the four strategies: a focus on agriculture and circularity (Scenario B), a focus on innovation and consumption (Scenario C), and a balanced distribution of support across all four strategies (Scenario D), as illustrated in Figure 4.

Figure 4: Four policy scenarios for reducing EU soy import dependency by 2035, varying in the distribution of policy support across protein diversification strategies.



A Scenario A **Business as usual**

This is the baseline scenario, in which no **additional policy changes** are introduced, and soy import reduction follows existing trends based on European Commission outlooks for protein crop area, food waste management, innovative protein development, and consumption patterns. No additional policy support is provided for any of the four strategies beyond current levels, and this scenario serves as the reference point against which the other scenarios are evaluated.

B Scenario B **Agriculture and circularity focus**

This is a scenario in which the EU concentrates its policy effort on its agricultural base and supply chain circularity. Support is directed towards the **expansion of domestic protein crop production** through targeted measures enabling farmers to diversify rotations on arable land, with harvested protein predominantly channelled into animal feed. On the circularity side, policy support aims to improve the **efficiency of agri-food waste valorisation** across the supply chain, from post-harvest and processing through to distribution and consumption, including regulatory reform to broaden the use of former foodstuffs as feed. Innovative protein production and consumption diversification follow baseline trajectories.

C Scenario C **Innovation and consumption focus**

This is a scenario in which the EU leverages technological innovation and demand-side measures as primary drivers of change. **Innovative protein production** is supported through accelerated and streamlined regulatory processes for innovative food and feed ingredients, and through substantial R&D and scale-up funding for fermentation and other promising biotechnologies. In parallel, measures are taken to improve the availability, affordability, and attractiveness of protein choices, incentivising consumers to **diversify their diets**. The innovative proteins produced are entirely directed towards food applications, absorbed by the consumer demand created through dietary diversification. Domestic protein crop production and circular feed use follow baseline trajectories.

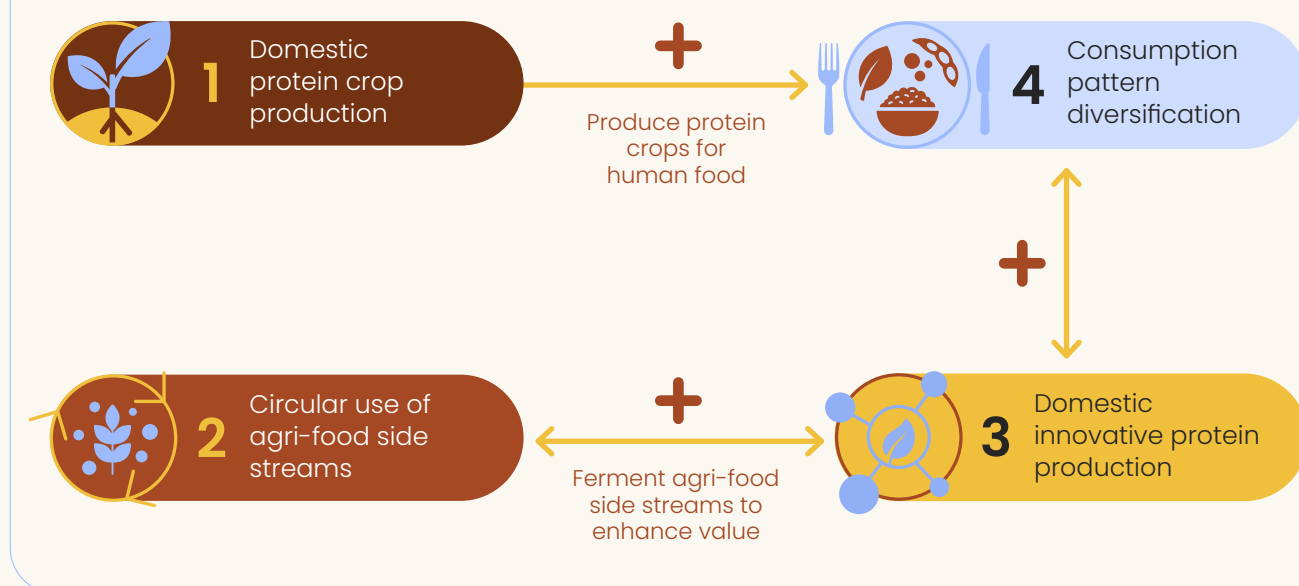
D Scenario D **Balanced focus**

This is a scenario in which the EU balances policy support **across all four strategies**. Farmers are supported in **expanding protein crop production**, serving both the feed market and the growing domestic food market. Measures are taken to improve the **efficiency of agri-food waste valorisation** into animal feed across post-harvest and processing steps of the supply chain, including through its use as feedstock for innovative protein production. **Innovative protein producers** have improved access to funding and experience more streamlined regulatory pathways, with outputs serving primarily food applications while also contributing to higher-value feed ingredients. **Consumers** are offered a **wider range** of attractive and affordable **protein choices** from domestically produced protein crops, products from circularly fed livestock, and innovative proteins.

The four strategies are not independent. When activated together, they generate a combined impact on soy import reduction that exceeds what any single strategy could achieve in isolation.

Three interactions are particularly relevant and were explicitly accounted for in the modelling (Figure 5).

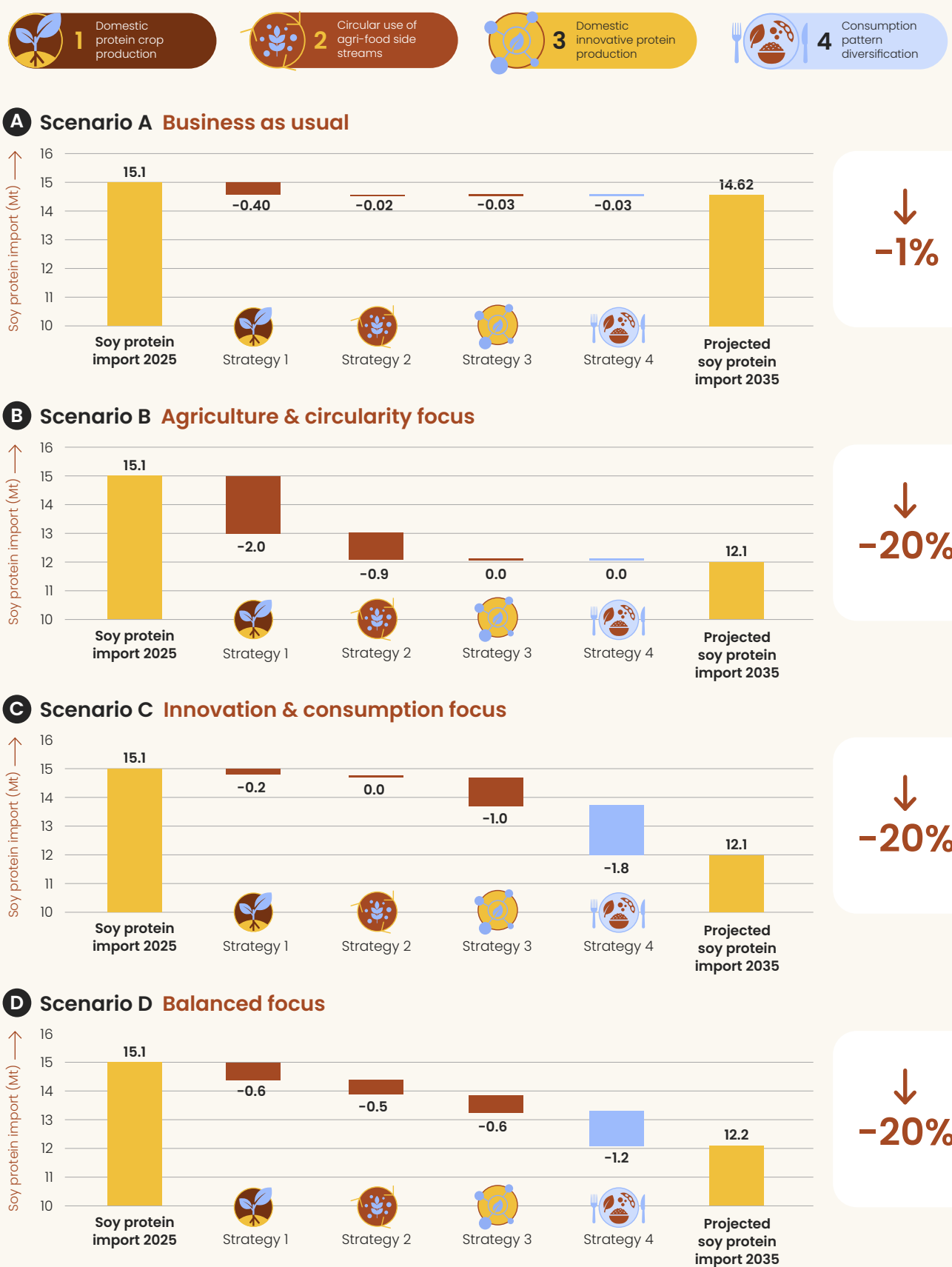
Figure 5: Modelled interactions and synergies across the four protein diversification strategies.



These synergies emerge in Scenarios C and D. In Scenario C, growing consumer demand for diverse protein sources expands the market for innovative food products. Policy support for innovative protein production in turn drives improvements in production scale, quality and variety, broadening the range of affordable choices available to consumers and further stimulating demand – a mutually reinforcing cycle between Strategies 3 and 4. In Scenario D, two additional interactions come into play. Agri-food waste streams serve as feedstock for fermentation processes, turning a low-grade input into a higher-value feed or food ingredient (Strategies 2 and 3). Finally, as EU diets diversify, farmers gain a growing outlet in the higher-value domestic food market, strengthening their incentive to expand protein crop cultivation (Strategies 1 and 4).

The modelling quantifies both the cumulative and individual contribution of each strategy to EU soy import reduction per scenario. The baseline scenario (Scenario A) follows projected trends based on European Commission outlooks. For Scenarios B, C and D, a 20% soy import reduction – defined as a reduction from approximately 15.1 Mt soy protein imports today to 12.1 Mt by 2035, equivalent to 3 Mt of crude protein – served as common target across all three scenarios. Figure 6 illustrates the individual contribution of each strategy to reaching that target.

Figure 6: Individual and cumulative contribution of each protein diversification strategy to EU soy protein import reduction by 2035, across four policy scenarios. For methodology and classification notes, see Technical Appendix.



4. Balance over silver bullets

The scenarios tell a clear story. Reaching a 20% soy import reduction by 2035 is achievable, but the three active pathways differ considerably in feasibility and in their wider impacts across the food system. Scenario D, the balanced approach, emerges as the most robust across three dimen-

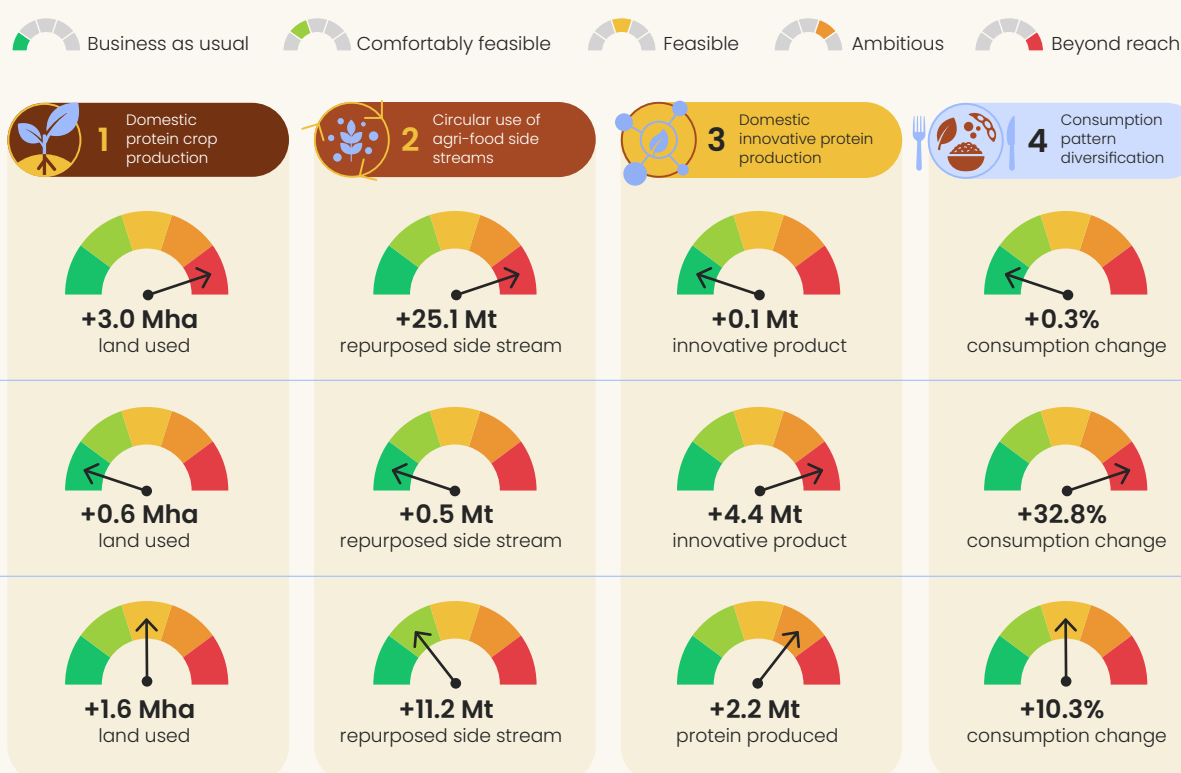
sions: it keeps every strategy within reach, produces the most broadly positive outcomes across environmental, social and economic indicators, and allows the EU to draw on the diverse strengths of its Member States. The sections below examine each dimension in turn.

4.1 Staying within reach

All three active scenarios reach the 20% target, but not with equal ease. Scenarios B, C and D are each designed to deliver the full 3 Mt reduction in soy protein imports by 2035, compared to the business-as-usual baseline (Scenario A) which falls

well short, reaching only around 1%. The meaningful difference between the three active pathways is therefore not whether they hit the target, but how much each individual strategy is stretched to deliver it. (Figure 7)

Figure 7: Feasibility of the required contribution per protein diversification strategy across Scenarios B, C and D. Green indicates well within the feasible range; red indicates beyond what is considered feasible by 2035. A full breakdown of the feasibility assessment for each strategy, including the underlying reference points and assumptions, is included in Appendix.



Scenarios B and C each illustrate what happens when effort is concentrated. In Scenario B, protein crop cultivation would need to expand to 3.0 Mha, more than doubling its current area and exceeding what even the EU's most protein crop-intensive Member States have demonstrated. Circular feedstock use would require a sixfold increase in agri-food waste utilisation compared to current levels. In Scenario C, innovative protein production would need to surpass independently modelled high-ambition projections by 2035, while consumption diversification would require a dietary shift of 32.8%, reaching original EAT-Lancet projections at a pace with no precedent in high-income contexts. In both cases, at least two strategies are pushed beyond their feasibility range.

Scenario D distributes the effort more evenly across all four strategies, relying on their synergies to unlock improved efficiency. Each contribution sits within or just at the edge of what is considered feasible by 2035: 1.6 Mha of protein crop expansion, 11.2 Mt of circular feedstock, 2.2 Mt of innovative protein production, and a 10.3% consumption shift. The 20% target becomes reachable through moderate, broadly distributed policy support rather than exceptional effort concentrated in one or two areas.

Scenario D's advantage goes beyond synergies between strategies. An additional reinforcing mechanism is the law of diminishing returns:

the first gains from any strategy are typically the easiest to unlock, while pushing it further requires disproportionately greater investment and coordination. This also implies that in the balanced scenario, policy can focus on enabling the farmers already willing to diversify their rotations and the consumers already willing to broaden their diets, mobilising existing momentum rather than forcing a full transformation from the outset.

Taken together, activating strategies in combination delivers greater soy import reduction per unit of policy effort than concentrating support on any subset.

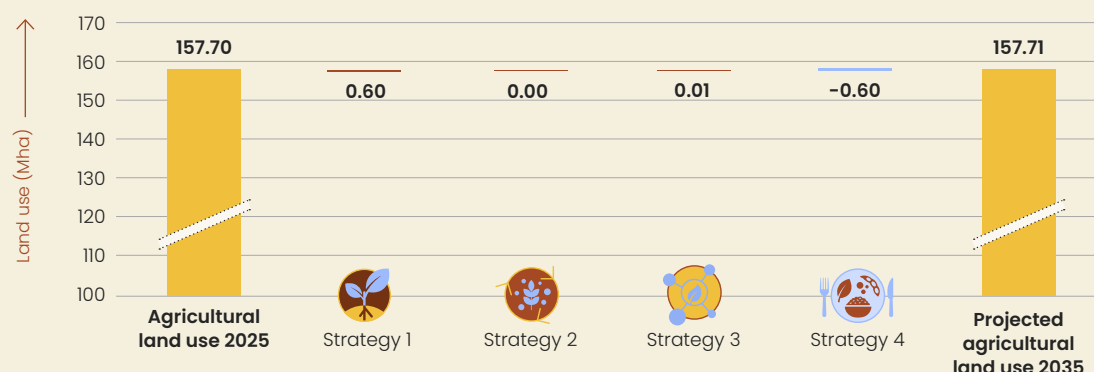
The land use dimension

All protein diversification strategies affect EU agricultural land use, but the two most prominent mechanisms work in opposite directions: protein crop expansion increases demand for agricultural land, while dietary diversification reduces it by lowering the need for feed crops and pasture-land. The complementary land use outcomes linked to each scenario are shown in Figure 8. While these figures provide an initial indication of where pressures increase and decrease, actual land use trajectories will depend on policy decisions at EU and Member State level. Beyond EU borders, reducing soy imports also reduces land pressure in exporting countries, though this effect falls outside the scope of the model.



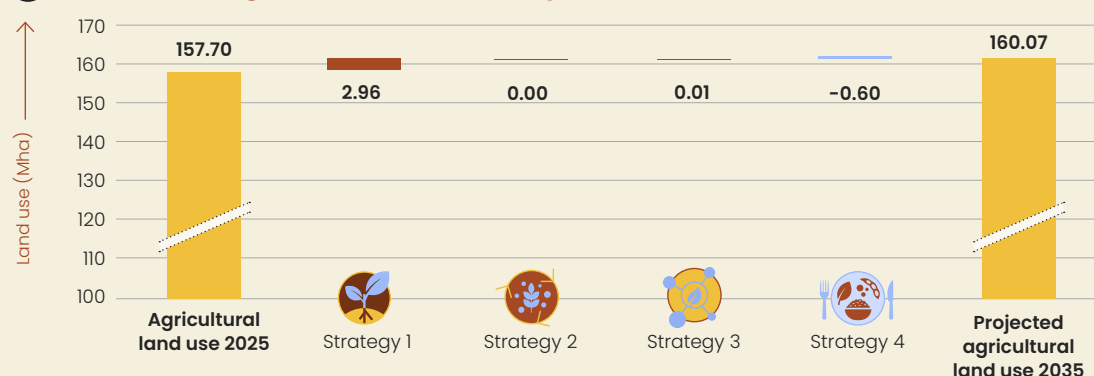
Figure 8: Change in EU agricultural land use per policy scenario by 2035. For methodology and classification notes, see Technical Appendix.

A Scenario A Business as usual



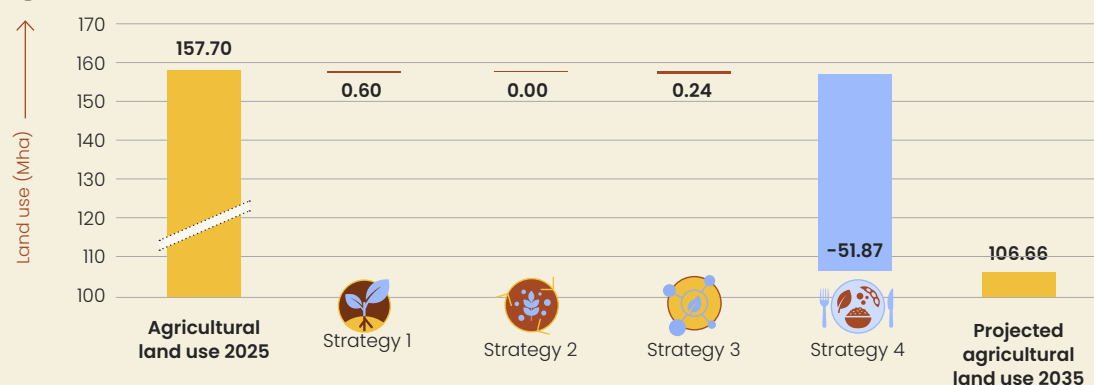
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B Scenario B Agriculture & circularity focus



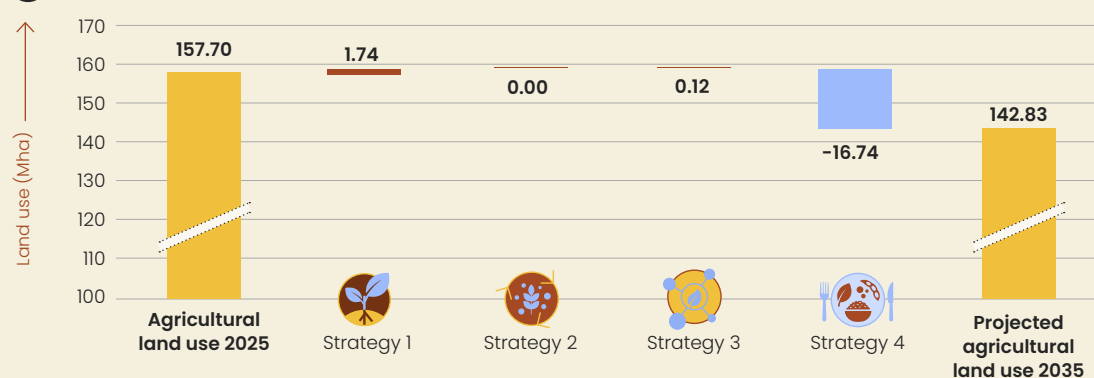
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+.01%

C Scenario C Innovation & consumption focus



↑
-48%

D Scenario D Balanced focus



↑
-10.4%

In Scenario B, where protein crop expansion is the primary lever, total EU agricultural land increases modestly. In the modelling, this expansion is largely absorbed by replacing EU cereal production, equivalent to approximately 14.6 Mt of cereal output annually, representing a significant loss of cereal export capacity for the EU. In practice, land use competition is likely to be more diverse, extending beyond arable cropland to nature areas and other civil uses, which may be difficult for Member States with limited land reserves to balance against environmental commitments.

In Scenario C, diet diversification has a substantial positive impact on agricultural land use, reflecting a reduction of around 50%. Both pasture and cropland needs contract significantly, freeing up land that could be directed towards nature restoration, extensification, nature-inclusive farming or other uses without competing with cereal production. Realising these benefits will however require very strong and well-managed land repurposing policy. At the same time, a contraction of this magnitude within a ten year window would also affect farming communities across the EU, particularly in regions oriented towards livestock and feed production, and would require transitional support well beyond what current policy frameworks provide.

Scenario D produces a moderate net reduction in agricultural land of around 10%, without affecting outlooks for cereal production in the EU. Protein crop expansion adds to the arable area, while dietary diversification reduces both cropland and pastureland. Freed land can be repurposed towards additional crop production, nature restoration, extensification or other non-agricultural uses. While Scenario D does not remove all complexity around land management, it keeps the pace and scale of change within a range at which policy can respond, affected communities can be supported, and the direction of land use remains more likely a choice than a constraint.

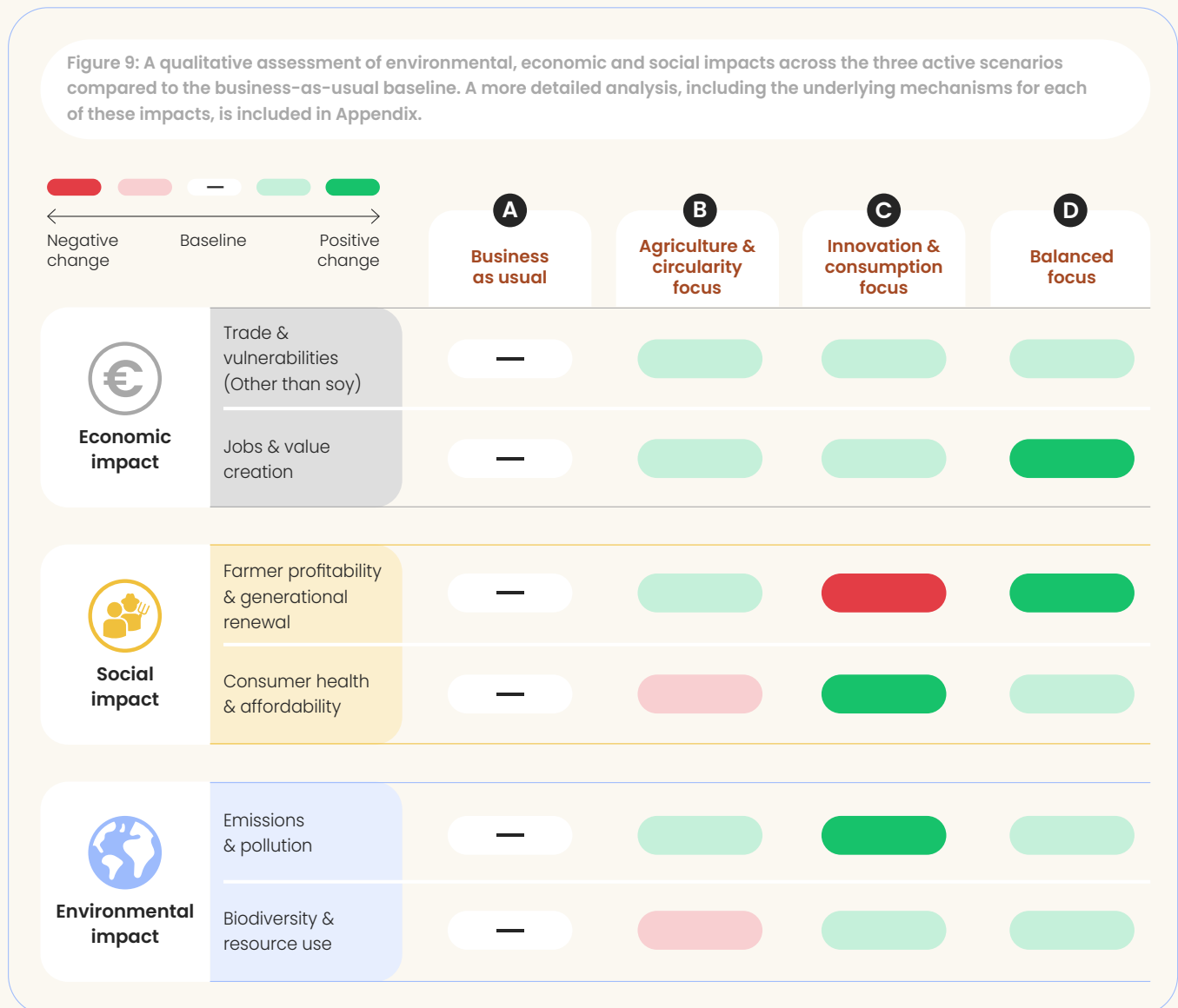


4.2 A wider food system perspective

The quantitative picture tells only part of the story. Beyond the ease with which each scenario reaches the soy import reduction target, the scenarios diverge markedly when examined across a

broader set of outcomes. Figure 9 summarises each scenario's effects across six indicators, spanning environmental, economic and social impacts.

Figure 9: A qualitative assessment of environmental, economic and social impacts across the three active scenarios compared to the business-as-usual baseline. A more detailed analysis, including the underlying mechanisms for each of these impacts, is included in Appendix.



The business-as-usual baseline (Scenario A) produces no meaningful improvement across any dimension: existing vulnerabilities persist, health and sustainability risks go unaddressed, and the economic gains that active policy could deliver remain out of reach.

Scenarios B and C each perform strongly on a subset of indicators, but in opposite directions. Scenario B delivers well for arable farmers and rural economies through protein crop expansion and circular feedstock use, with a modestly positive environmental footprint on emissions and agricultural input use. Its weakness lies in the land

pressure generated by protein crop expansion, which could come at the expense of the EU's cereal production, and in the missed opportunity to build jobs and economic value through the EU's food and feed biotech sector, or to address diet-driven health risks. Scenario C inverts this pattern: it delivers the strongest environmental and consumer outcomes, with substantial reductions in emissions, land pressure and disease risks, and growing competitiveness in innovative proteins. Yet the concentration of effort on innovation and consumption risks undermining rural jobs and economies, unless value-chain models are designed to anchor economic benefits in rural areas. Scenario C may also create real challenges for livestock farmers, whose market share and business cases weaken considerably without adequate transition support. Both scenarios leave significant trade-offs unresolved and require substantial transitional support in the areas where they fall short.

Scenario D stands apart, delivering positive change across the spectrum. Environmental out-

comes are positive across emissions, land use, biodiversity and resource efficiency, with further gains possible if freed-up agricultural land is repurposed. Both urban and rural jobs grow under expanding circular feed and innovative protein production sectors. Meanwhile, farmer business cases hold up across arable and livestock sectors. Arable farmers gain access to more profitable food and feed markets through protein crop expansion and diet diversification, and benefit from new income streams through circular feed and innovative protein production. Livestock farmers see input cost volatility ease as circular and innovative feed sectors reduce reliance on imported soy and specialised feed ingredient markets, providing a more stable foundation as dietary shifts gradually reshape demand. Consumers benefit from greater choice, affordability and reduced health risks.

In the balanced scenario, benefits are more evenly distributed, trade-offs are more manageable, and the overall policy configuration proves more robust across environmental, economic and social dimensions.

4.3 A union of complementary strengths

Approaches to protein diversification and food security vary considerably across the EU. Agricultural conditions, industrial capacities and consumer landscapes differ from one Member State to the next, and so do the strategies each is best placed to pursue.

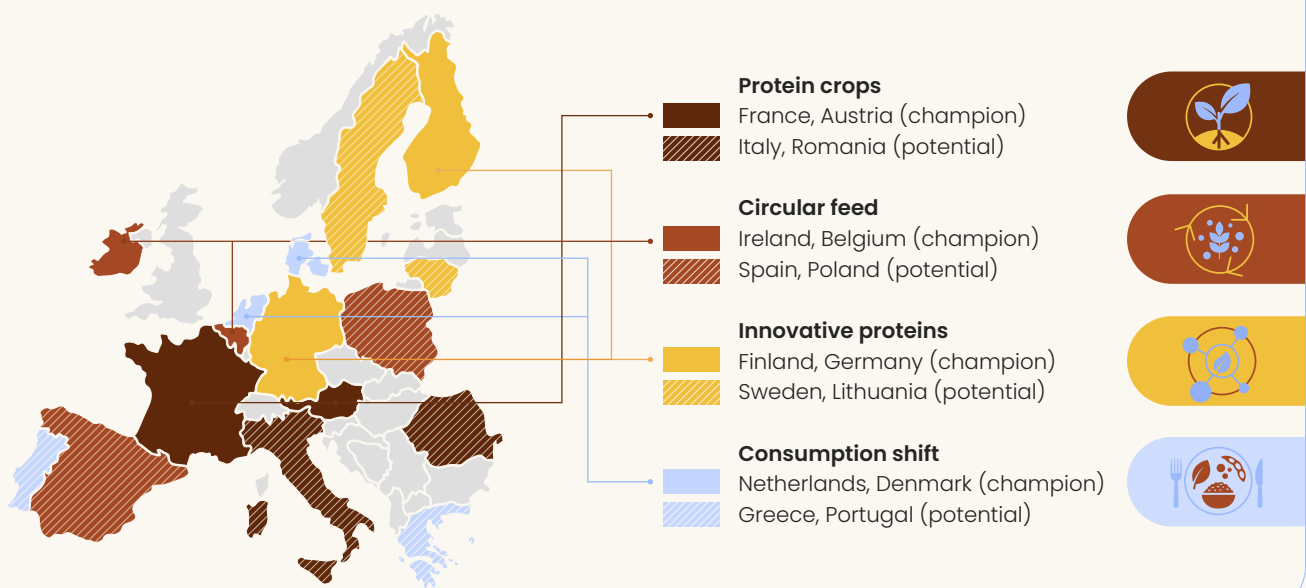
The EU has already set an overarching direction. The 2022 Versailles Declaration established reducing protein dependency as a matter of strategic autonomy, the EU's Comprehensive Protein Plan announced in the Commission's Vision for Agriculture and Food is around the corner, and the post-2027 CAP reform, Livestock Strategy, Biotech Acts and broader Multiannual Financial Framework discussions represent a once-in-a-decade window to turn political direction into structural policy.

Several Member States have not waited for EU-level coordination to act. France channelled over €120 million into protein crop expansion through its Plan Protéines, with an ambition to double protein crop area by 2030. Austria has pursued a comparable approach on a smaller scale, launching its own protein crop strategy that bundles national initiatives to expand domestic protein crop production and strengthen supply chains. Ireland and Belgium both demonstrate what public funding can deliver for the circular feedstock pathway. EU Just Transition Fund-backed projects in Ireland upcycle agri-food by-products into feed ingredients at commercial scale, and EU LIFE-supported initiatives enable industrial-scale conversion of former foodstuffs in Belgium. Finland has backed innovative and fermentation-based protein

production through dedicated national grants, channelling over €43 million into companies such as Solar Foods and anchoring the approach in its National Food Strategy 2040. Germany followed in May 2026 with its High-Tech Agenda Biotechnology Roadmap, firmly positioning innovative proteins as a national strategic priority. The Netherlands, meanwhile, has focused on shifting consumption:

over 90% of food retailers have committed to a 60% plant-based protein sales ratio by 2030, and dietary guidelines were updated in 2025 to reflect the shift. Denmark published the EU's first national action plan for plant-based foods, introducing concrete measures to broaden consumer choice alongside farming and food innovation subsidies.

Figure 10: Protein diversification strategies across EU Member States: illustrative examples of current champions and countries with untapped potential, based on the chapter overview. The map is not exhaustive. Member States not highlighted may have relevant activity and those shown may pursue strategies beyond those indicated.



Considerable potential nevertheless remains untapped across the Union and would benefit from targeted EU policy support. Several major soybean-growing Member States have yet to develop formal protein crop strategies, among them Italy, the EU's largest producer, and Romania, the third largest. Countries such as Spain and Poland already have growing commercial activity in circular feed and former foodstuffs processing but lack the coordinated frameworks needed to scale it. Sweden and Lithuania both have strong biotech foundations, but neither has yet matched the targeted national strategies through which Finland and Germany have elevated innovative protein production to an explicit strategic priority. Across much of Southern Europe, lastly, protein diversification has yet to find its way into dietary guidelines, despite the deep-rooted legume traditions and Mediterranean food cultures of countries

such as Portugal and Greece that could make this a natural fit rather than a difficult shift.

Out of the three active scenarios, only Scenario D closes these gaps and fully harnesses the EU's diversity, allowing each Member State to lean into the strategies where it has a comparative advantage while maximising their collective potential.

Although a minimum level of engagement across both production and consumption will be required, Member States are not progressing at the same pace across all four strategies, and they do not need to. A balanced, coordinated approach would allow the Union to leverage the full strength of the single market, aligning incentives, removing bottlenecks and scaling what works, unlocking synergies that no Member State acting alone could achieve.

5. Turning ambition into policy action

The European Commission has already recognised the strategic importance of Europe's protein system, both in its Vision for Agriculture and Food and in the ongoing work towards a comprehensive EU Protein Plan. This Plan offers a unique opportunity to tie together strategic autonomy, climate, health and competitiveness in one coherent framework, looking simultaneously at food and feed, production and consumption, and the full length of the value chain. Realising that ambition, however, will depend on how well it connects to the wider legislative agenda, and on how consistently its objectives are reflected across the post-2027 CAP, the CMO, the National and Regional Partnership Plans, the European Competitiveness Fund and related files, all of which are currently under negotiation.

This chapter sets out policy recommendations focused on Scenario D, the balanced path that the modelling identifies as both the most feasible route to a 20% soy reduction and the one that minimises trade-offs across the food system. The recommendations represent the policy mix most likely to reduce Europe's protein dependency in practice, and should be understood as complementing, not replacing, trade-policy efforts to diversify the EU's remaining import dependencies across a wider range of partner countries.

“Food and protein security must be treated as a cross-cutting political priority, coherently coordinated across DGs and Member States rather than managed as a siloed agricultural concern.”

The direction taken by Europe's food and protein system over the coming decade will shape the livelihoods of farmers, the choices available to consumers, and the strategic resilience of the Union as a whole, demanding policy coordination at a level of ambition that matches the challenge. A further priority is the establishment of a structured cross-value-chain governance, enabling coordinated responses across the sector and directing transition support to where it is most needed. The Fertiliser Action Plan offers a useful precedent, bringing together actors across production, processing and consumption under a shared framework.

A comparable architecture for protein diversification would allow the EU to identify bottlenecks across the value chain, target transition support where pressures are greatest, and ensure that no actor, including livestock farmers facing a gradual reshaping of their feed economics and market environment, is left to navigate the shift alone. The strategy-specific recommendations that follow are each designed to operate within this overarching context, spanning the full value chain and reflecting the balanced scenario's logic of complementary, mutually reinforcing action.

Figure 11: Policy direction across the 4 strategies to reach the balanced scenario. More details on each of the recommendations can be found in Appendix.



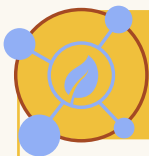
1 Domestic protein crop production

- Launch an **EU protein crop innovation mission**
- **De-risk adoption** with a stronger CAP package
- **Increase farmer bargaining power** through sector organisation in the CMO
- Support **local processing** and create **demand pull** for EU-grown feed proteins



2 Circular use of agri-food side streams

- Fund an **EU R&I programme for circular feedstock** research, testing and demonstration
- **Modernise feed rules** through a science-based approval pathway for low-risk circular streams
- **De-risk investment** in collection, processing and traceability infrastructure
- Create a circular feedstock **observatory and market framework**



3 Domestic innovative protein production

- **Recognise food and feed biotech** as a strategic sector
- Build shared **scale-up infrastructure** and **blended finance** mechanisms
- **Streamline regulatory path to market** without lowering safety standards
- Invest in end-to-end R&I for **improved product performance** and **process efficiency**



4 Consumption pattern diversification

- **Update dietary guidelines** to explicitly support protein diversification
- **Align public procurement & school meals** with protein diversification goals
- **Invest in uptake**, not just information
- **Shape the retail food environment** to make diversified proteins the easy choice



1 Domestic protein crop production

Strategy 1

In the balanced scenario, expanding domestic protein crop production delivers around 0.6 Mt of the 3 Mt soy protein reduction. Capturing that contribution depends on two moves that have to advance together: making protein crops a financially attractive choice for farmers, and building the processing capacity and market outlets that connect supply with demand. Neither works alone — farmers will not plant without a viable offtake, and processing investment will not follow without supply. A stronger CAP support package and EIB-backed investment in regional processing hubs are therefore the two key priorities. Sector organisation through producer and interbranch organisations, alongside a dedicated innovation mission and market uptake mechanisms, build the longer-term structural conditions that sustain expansion.



2 Circular use of agri-food side streams

Strategy 2

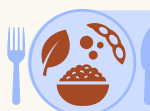
Circular feedstocks deliver around 0.5 Mt of the soy protein reduction in the balanced scenario. The barrier here is that safe, protein-rich streams are kept out of the food and feed system by regulatory ambiguity and missing midstream infrastructure. These two constraints reinforce each other: investors will not build collection and processing capacity without regulatory certainty, and regulators have little to point to without proven, traceable processing. The primary move is therefore a clearer risk-based regulatory pathway for low-risk streams, advancing alongside investment in the collection, processing and traceability infrastructure that makes safe circular feedstock use viable at scale. A quality and certification framework then consolidates the market, while any reassessment of the swill-feeding ban remains a longer-term, strictly evidence-led step rather than a day-one measure.



3 Domestic innovative protein production

Strategy 3

Innovative protein production contributes around 0.6 Mt soy protein reduction to the balanced scenario. Europe's innovation capacity is ahead of most other regions in this field, yet slow routes to market, access to fit-for-purpose scale-up infrastructure and a cautious EU investment landscape remain the key barriers holding the sector back. A first step is recognising food and feed biotech as a strategic priority sector: this opens dedicated funding windows in Biotech Act II, the European Competitiveness Fund and FPI0, and provides the political foundation for streamlining regulatory pathways to market without compromising safety standards. Targeted funding can then address two distinct needs: filling remaining R&I gaps around cost efficiency and product performance, and establishing blended finance mechanisms for infrastructure access, such as innovation vouchers and shared commercial hubs, to ease the journey from pilot to industrial scale.



4 Consumption pattern diversification

Strategy 4

Diversifying consumption is the largest lever in the balanced scenario, delivering around 1.2 Mt of the 3 Mt soy protein reduction. That weight reflects the scale of demand-side potential, but it is also the contribution most dependent on sustained, well-designed policy rather than any one-off intervention: demand shifts gradually, and only holds if the food environment shifts with it. The levers work on different timescales. Public procurement is the fastest and most controllable signal the EU has, and should move first; updated dietary guidelines and a reshaped retail environment work more slowly but are what make the shift durable rather than temporary. While total EU protein consumption is assumed to remain unchanged, the aim is a broader mix of protein sources and more diverse, healthier diets for European consumers.

Delivering Scenario D in practice depends not just on the strength of each individual strategy, but on how policies are designed to reinforce one another across the value chain. A coherent mix of measures can ensure that gains in one part of the system (such as more protein crops in rotations) are matched by demand, infrastructure and regulatory conditions elsewhere, so the transition works for farmers, processors and consumers alike.

For example, demand side policies under Strategy 4, such as updated dietary guidelines, procurement criteria and retail portfolio targets, can significantly strengthen the business case for farmers to grow protein crops and for processors to invest in local infrastructure, by expanding outlets for legume based foods and feed ingredients. Likewise, circular feed rules and infrastructure (Strategy 2) can reduce pressure on land and imported soy, making it easier for livestock sectors to adapt gradually, while innovative proteins (Strategy 3)

can provide additional options for both feed and food that complement rather than compete with legumes.

Food and feed systems are critical yet fragile, and deserve the coordinated European response that has long been missing. Orchestration across the Secretariat-General, DG AGRI, DG SANTE, DG GROW, DG COMP, DG RTD, DG CLIMA, DG ENVI and others is essential so that CAP instruments, the CMO, NRP/partnership agreements, the European Competitiveness Fund, research programmes and trade policy all point in the same direction: reducing dependence on a narrow set of imported proteins, diversifying and circularising supply, and supporting viable livelihoods along the chain. Only a coherent, cross-cutting approach can deliver a protein transition that is strategically robust, socially fair, sustainable and economically attractive for all actors involved.



6. Conclusion

Food security should be a cross-cutting EU priority. The EU has shown that in times of mounting pressures and instabilities it can respond decisively to strategic dependencies in energy, defence and technology. The response logic is well established: identify the dependency, assess the disruption risk, diversify supply and build domestic capacity before a crisis forces improvisation. Food, and the protein system that underpins it, demands exactly that same response to support the EU's resilience and maintain social stability. The gap between the strategic reality and the current policy treatment is increasingly hard to justify.

Soy illustrates that gap with unusual clarity. With 91% of the soy protein it uses imported, and 86% of those imports sourced from just three countries, the EU's livestock sector rests on a supply chain that is both structurally exposed and highly concentrated. A disruption of those flows would ripple through feed and food systems, destabilise supply chains and could cost the EU up to 40% of its current livestock production capacity. The risk of disruption is unfortunately not hypothetical, but a pattern that history has demonstrated repeatedly, and that recent geopolitical events continue to reinforce.

Protein diversification is a credible and measurable part of the answer. This report has shown that a 20% reduction in EU soy imports by 2035 is achievable, but only through a balanced combination of all four strategies: expanding domestic protein crop production, optimising circular feed use, scaling innovative protein production, and diversifying consumption patterns. No single lever can carry the full weight. Concentrating policy effort on any subset pushes individual strategies beyond their feasibility limits, creates avoidable trade-offs, and leaves synergies across the value chain untapped.

The balanced approach unlocks something greater than the sum of its parts. It distributes effort in a way that is feasible, efficient and fair — keeping each strategy within demonstrated reach, generating positive outcomes for farmers, consumers, rural communities and the environment simultaneously, and allowing the EU to build on the regional strengths and sectoral investments that Member States have already developed.

Delivering this requires coherent and predictable policy across the full value chain, from primary production to consumption. Food security cannot be addressed from a single DG or through a single policy file. It needs consistent signals across the CAP, the CMO, the Comprehensive Protein Plan, the Livestock Strategy, the Biotech Acts, public procurement reform and the European Competitiveness Fund. All of these are on the table simultaneously — a once-in-a-decade alignment of instruments that should not be missed.

Above all, the findings of this report show the urgency of a shift in perspective. Europe has everything it needs: the diversity of its farming landscapes, the ingenuity of its food and biotech sectors, the strength of its single market, and the political will to act when the stakes are clear. Rather than getting stuck in polarising debates between animal, plant and novel protein sources, EU policymakers can move on to address what really matters: embracing the full breadth of what European food and farming can offer, and building a food system resilient enough to secure EU citizens' access to safe, affordable and nutritious food, in good times and in times of crisis alike.

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