



The path to sustainable food systems: key challenges, trade-offs and way forward

DG SANTE, AGRI and MARE

*SAM Stakeholder Consultation
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Key challenges

- *Exist at all stages of the food supply chain*
- *Need to be addressed so that no one is left behind*
- *Barriers of today can be opportunities of tomorrow*

Challenges of EU food systems

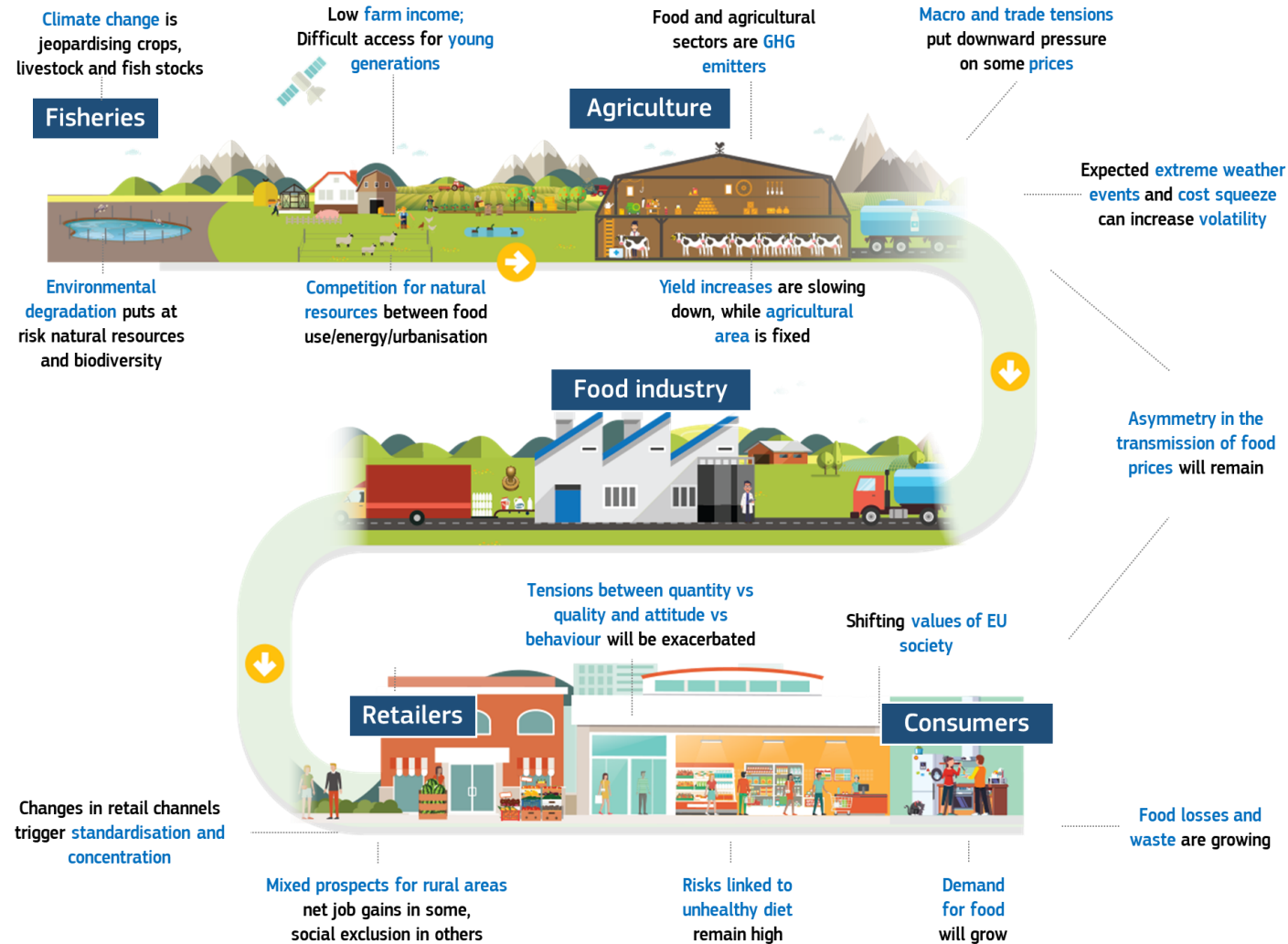
Farm



To



Fork



Transformation of the global food system

A transformation of food supply systems is taking place (Food and **Farming 4.0**)

- ...based on *digital* technologies, *innovation of practices* throughout the food chain...
- ...with huge potential to mitigate increases in *environmental costs* from higher standards...
- ...but with significant *gaps* in the *knowledge*, applications and perceptions on these technologies

Food demand is changing, driven by mixed **shifts in tastes and preferences**

- ...population, income & consumption *trends differ worldwide*, with some regional food deficits...
- ...but developed-, emerging- and developing-world *dietary patterns differ* significantly...
- ...while growing *expectations* for solutions must be based on sound analysis (e.g. livestock)

Globalisation and trade opened up markets and increased economic welfare

- ...but *price volatility* also increased, often driven by exogenous factors (macro, geopolitical, etc...)
- ...highlighting differences in *costs*, driven by different production (and not trade) standards...
- ...and brought to the forefront the need for mechanisms whereby “*winners*” compensate “*losers*”

Link of CAP reform to the Green Deal

The Green Deal requires the future agricultural policy to focus on, among others:

- **A growth strategy...**
... with CAP Strategic Plans supporting innovation, and contributing to *improving the position of farmers in the food supply chain*
- **Significant reduction in input use ...**
... need to be reflected in CAP plans with respect to *fertilisers, pesticides and antibiotics*
- **Boosting organic production ...**
... with measures that ensure a *balanced growth* of both *supply and demand*

Fisheries – Key challenges

CFP has brought significant progress for the environmental sustainability of fisheries

(including fight against food waste – landing obligation)



How can we maintain the current supply, in view of:

Climate crisis?

Biodiversity crisis?

Increased competition for marine space (windfarms, aquaculture, MPAs?)

Food fraud (traceability)?

*In the Atlantic, North Sea and Baltic Sea, more than **99% of fish landed from EU waters are fished sustainably.***

Fish stocks have grown by 30% over the last 15 years.



How can we maintain this progress and improve performance where progress is less evident?

Aquaculture

Challenges

Environmental impacts

World population growth and nutrition:
role of aquaculture

Food security
EU imports 2/3 of seafood.
10% of consumption from
EU aquaculture.

Opportunities

GROWING SECTOR

EU aquaculture production up by 11% in volume from 2008-2017

INNOVATION POTENTIAL

On-land systems, Algae initiative, bio-economy, circularity

ENVIRONMENTAL ASSETS

of certain forms of aquaculture, e.g. nature/landscape preservation

JUST TRANSITION FOR ALL

economic and social benefits for coastal and rural communities

Tools

Review Strategic Guidelines on Sustainable Development of EU Aquaculture in 2020

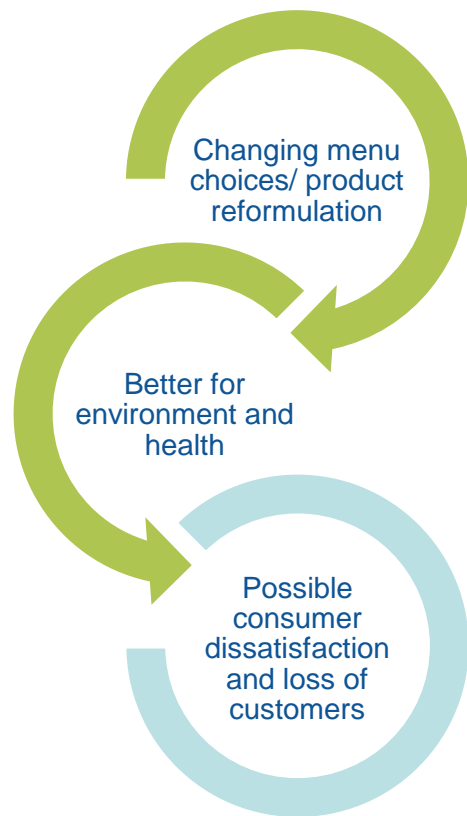
EMFF support
National Action Plans by MS

Exchange of best practices
Commission guidance ENV legislation



Food processing/food services

Example of challenges faced by food services and food processing sector



Retail

Example of challenges faced by retail sector

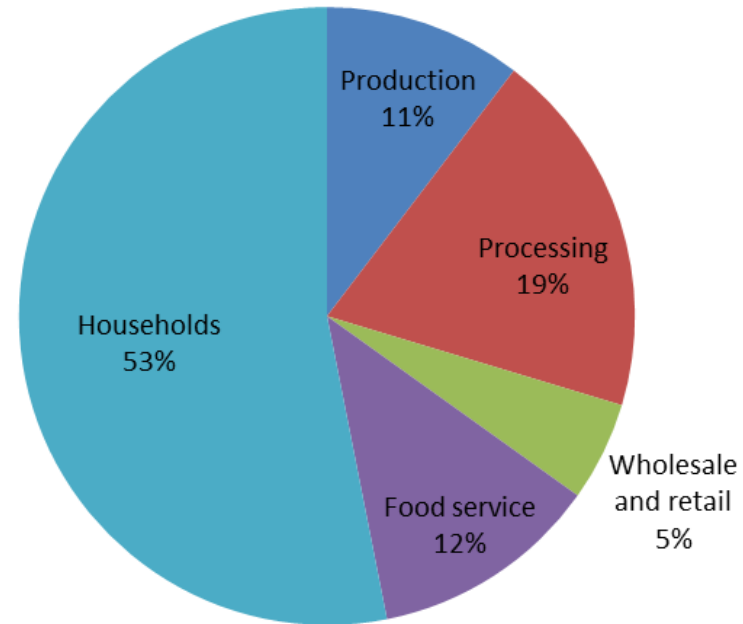


Consumer behaviour

Example of sustainable consumption challenge:
food waste

- **88 (\pm 14) million tonnes of food waste per year**
- **143 billion euros**
- **~ 304 Mt CO₂ eq (6% of total EU GHG emissions)**

*How to translate growing awareness into **behavioural change**?*



Source:
FUSIONS project, 2016 (based on 2012 data)

Innovation uptake

Sea food production (including wild capture) has a **lower carbon footprint** than other food products and are an important protein source



How can we encourage uptake of sustainably sourced seafood by consumers, in particular alternative and innovative products like Algae?



International dimension

Examples of challenges at global level:

- How to ensure competitiveness of EU producers/manufacturers in global market?
- How to support and promote global transition to sustainable food systems?

Thank you



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