

# Strategic autonomy and food

*28 June 2023*

- Food supply
  - Food security
  - Self sufficiency
  - Sovereignty
- 
- (Open) Strategic Autonomy
- JRC foresight reports 2021, 2022 and 2023 (upcoming)
  - Industry strategy
  - Trade policy review
  - ES Presidency work strain

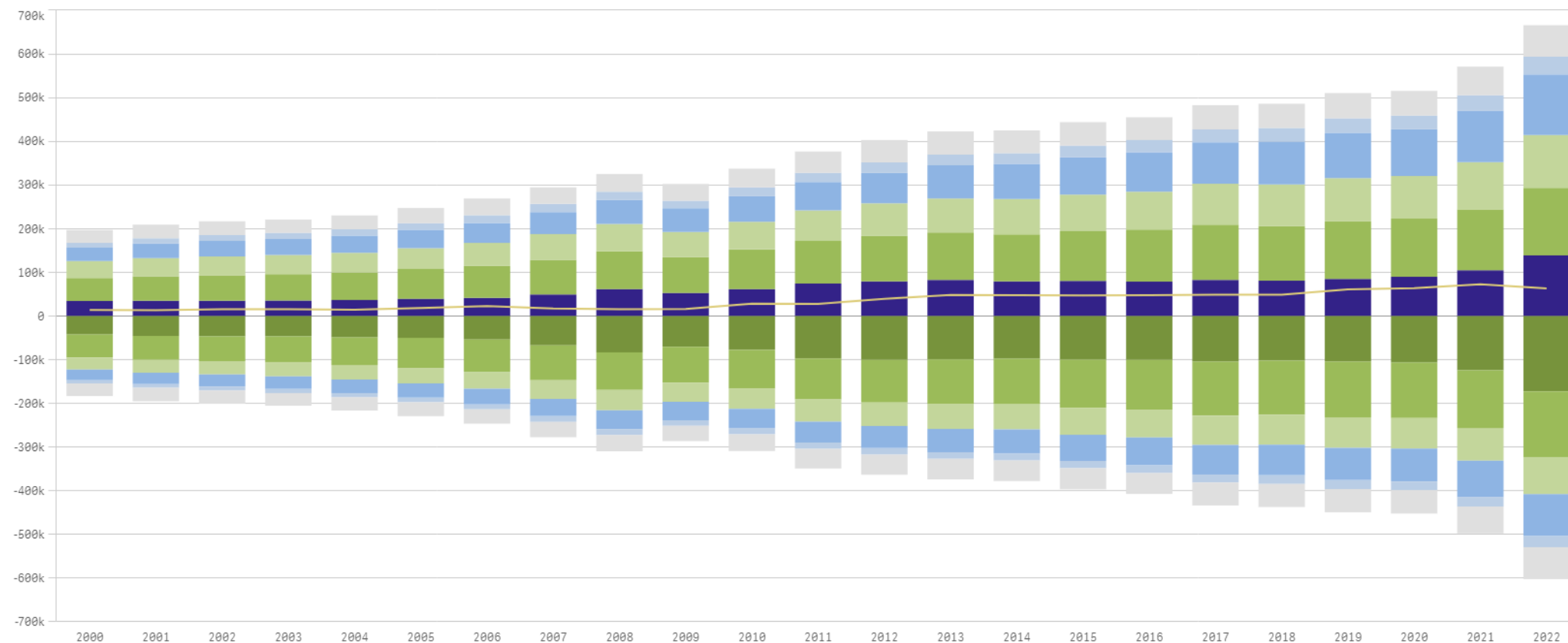
- Shaping & securing THE EU'S OPEN STRATEGIC AUTONOMY by 2040 and beyond (JRC, 2021)

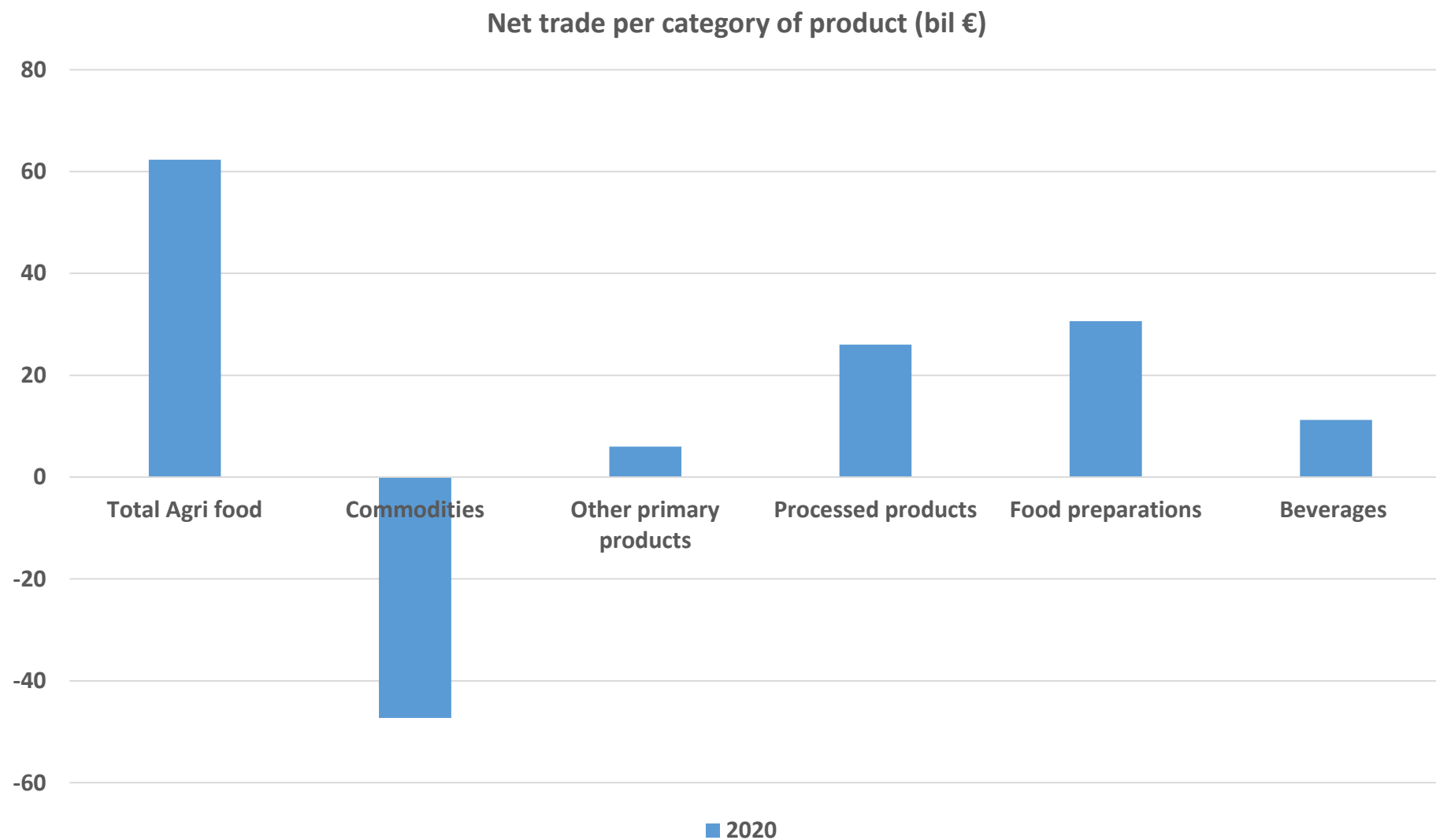
“The concept of open strategic autonomy has emerged in a context of **increasing global connectivity and multidimensional interdependence** on the one hand, and **assertive to aggressive competition** on the other. Its core features include notions of a future state of **enhanced resilience, managed mutual interdependence** and relative power evolving from **existing capacities, vulnerabilities, and dependencies**.”

Security and defense -> geopolitics, economy (critical raw materials and supply chains), law (regulation and standards), technology, environment and climate, social, governance

### Agri-food trade performance with all countries (million EUR) for European Union

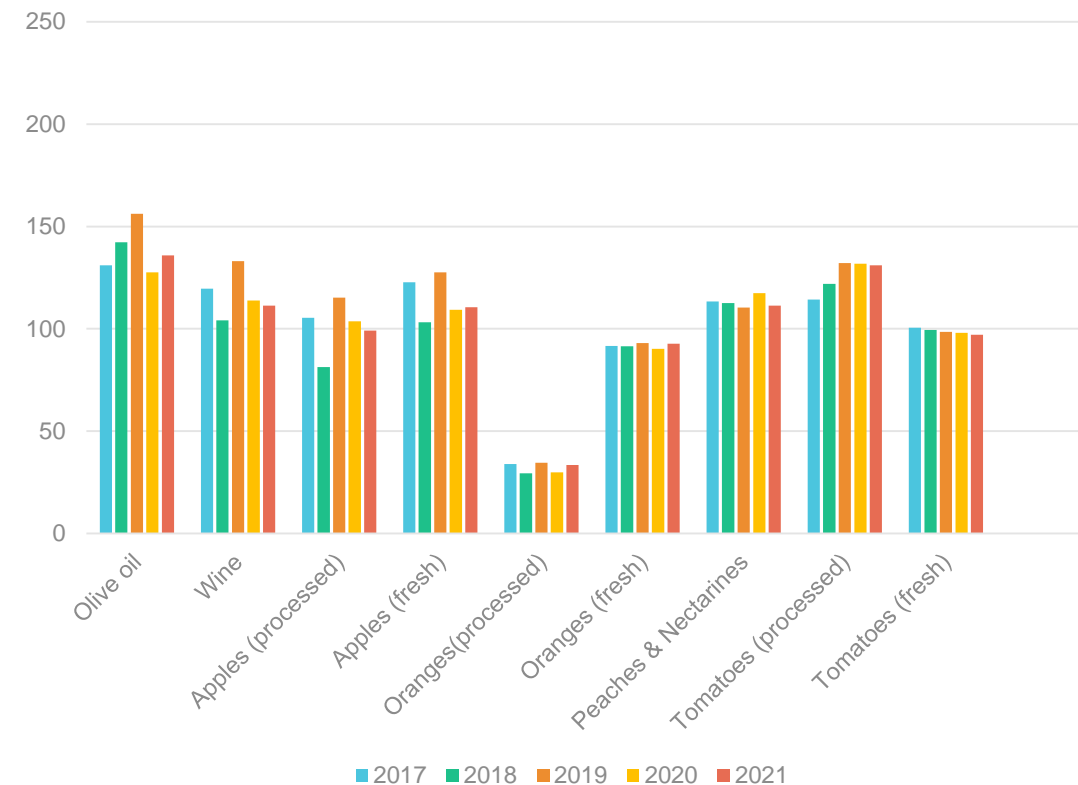
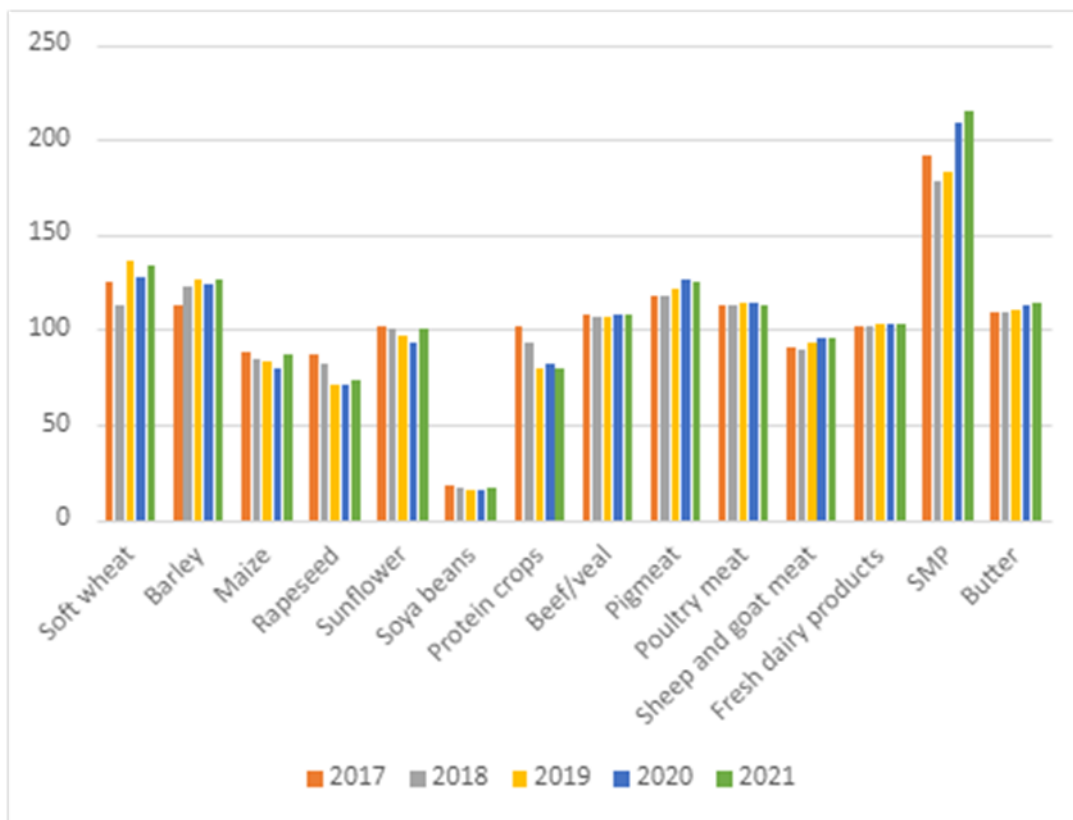
(Exports above 0 line, imports below)



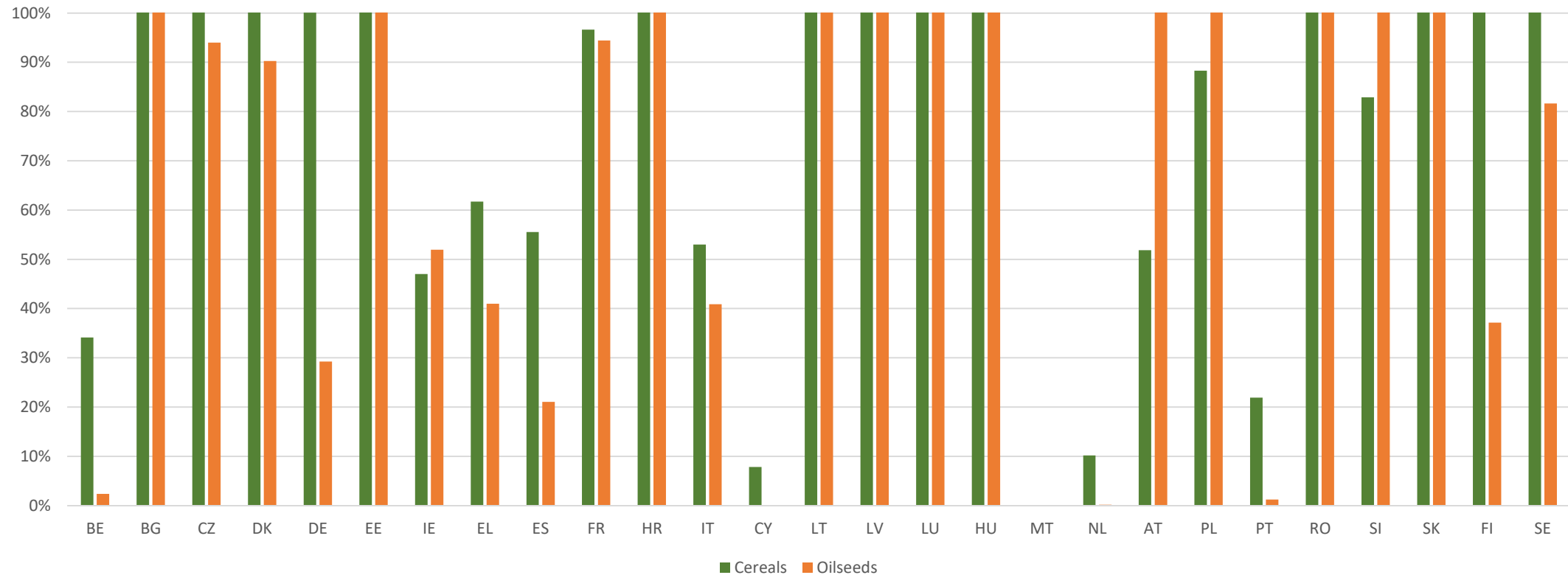


Source: DG AGRI from Eurostat (Comext) data

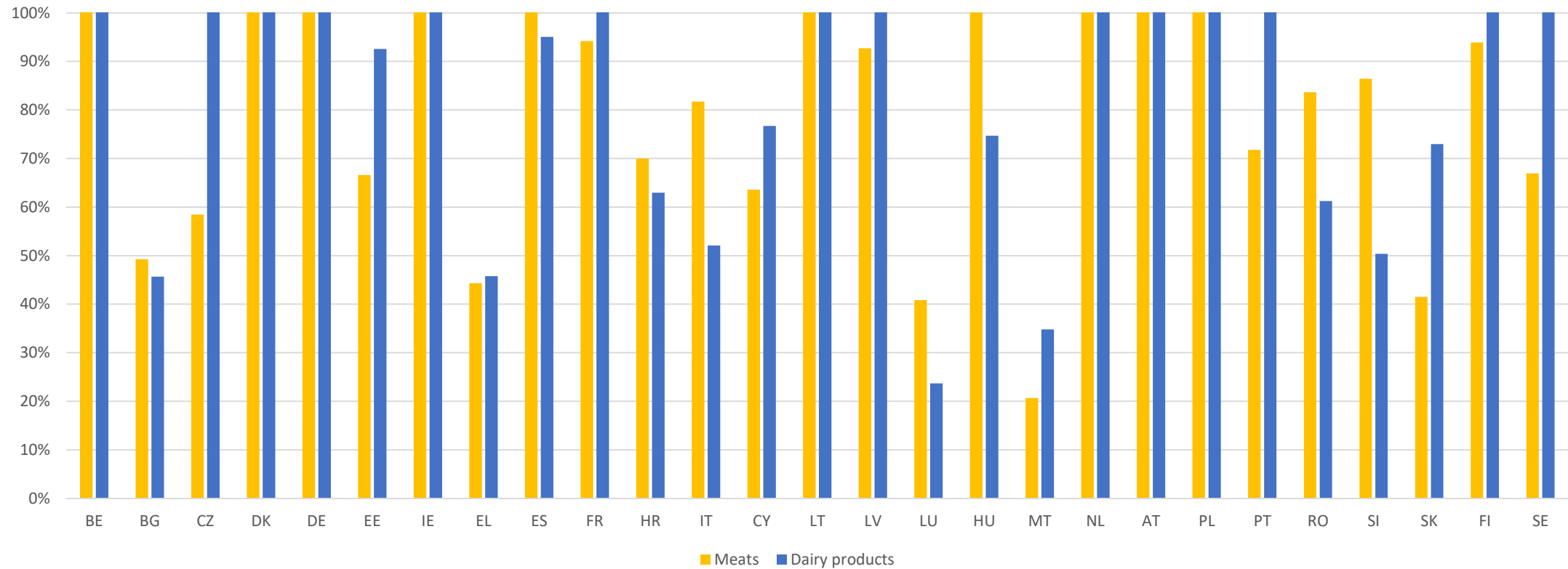
# Self-sufficiency rates



# Self sufficiency per MS

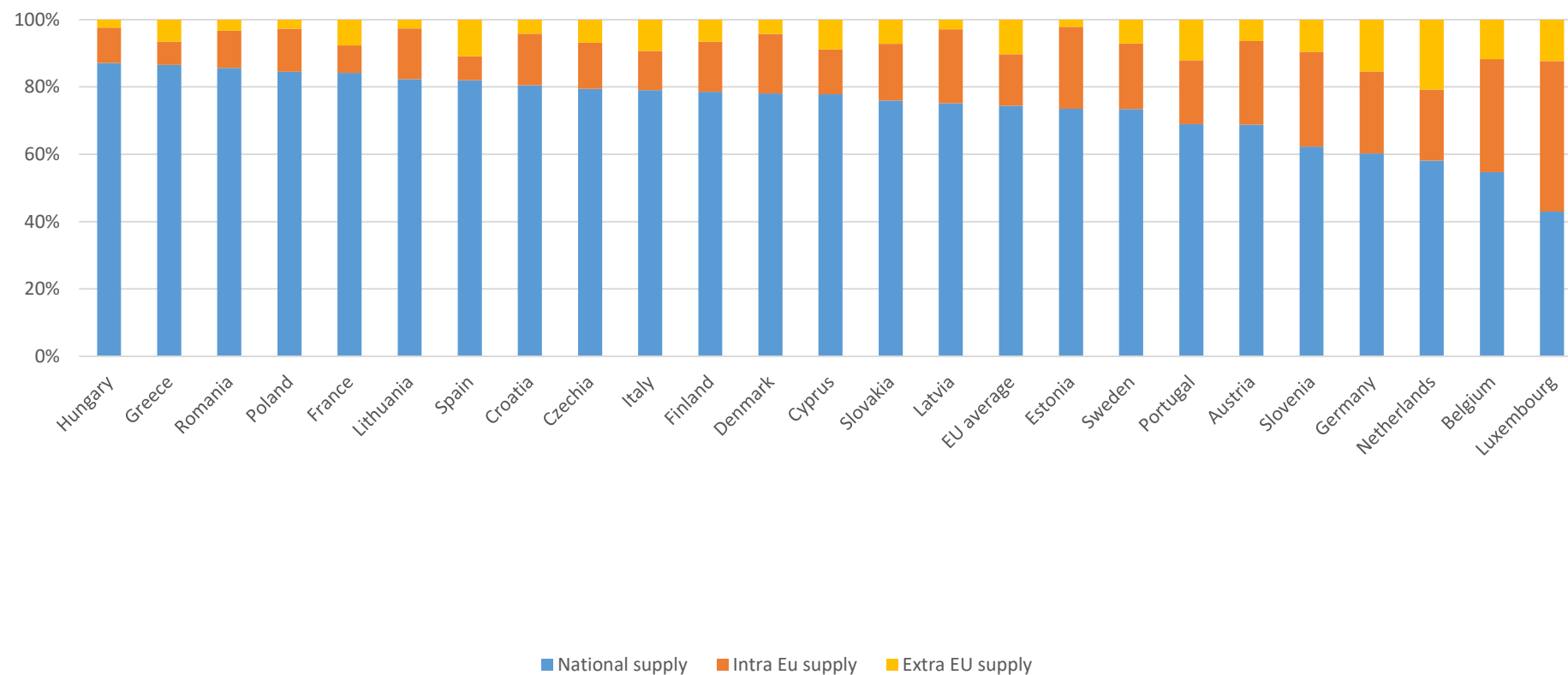


# Self sufficiency per MS

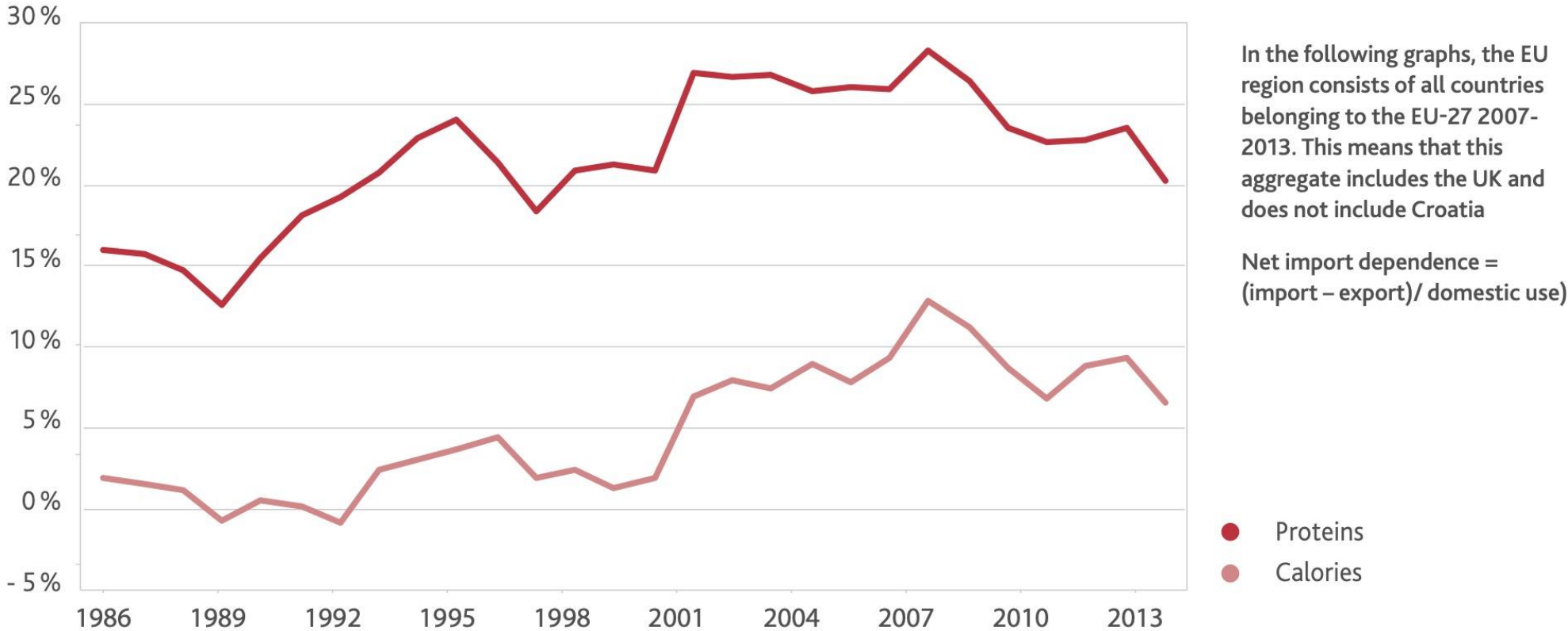




# Source of supply per MS (Agri)



**FIGURE 3.** EU-27 Net import dependence in calories and proteins (1986-2013)



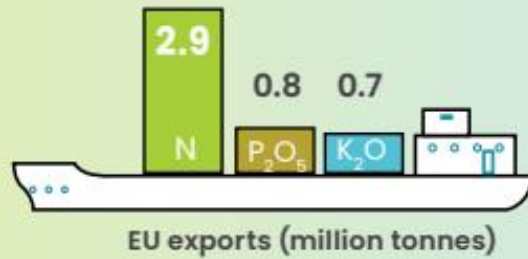
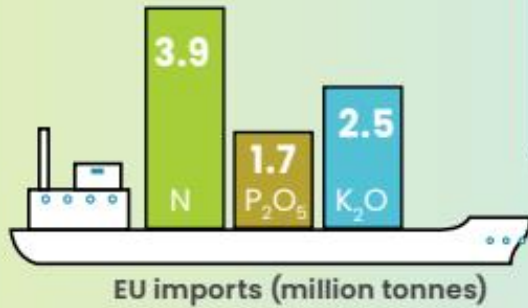
Source: FAOSTAT, IDDRI treatment

# Import dependency rate



Total EU-27  
consumption\*

17 M  
tonnes (of nutrient)



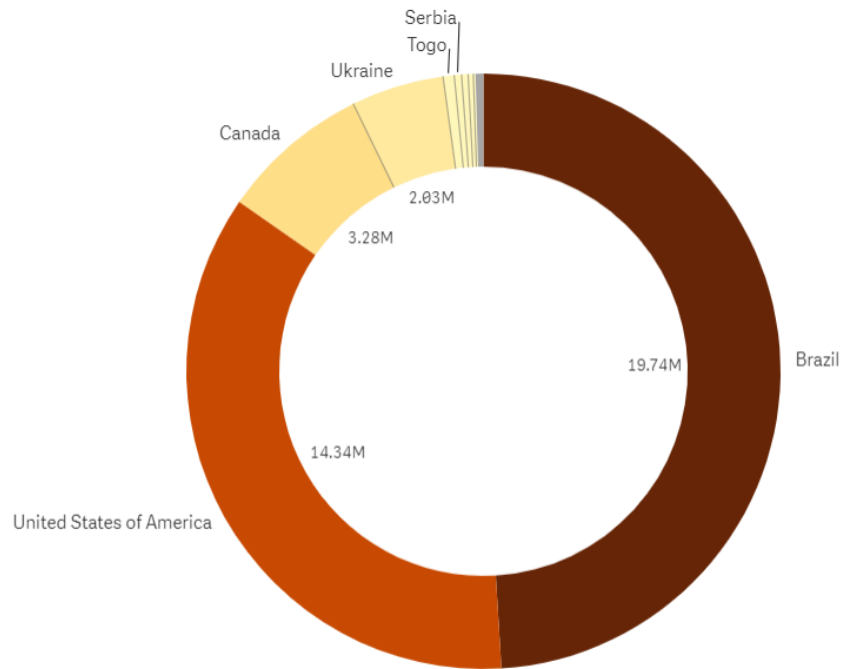
Imported products' share  
of EU consumption



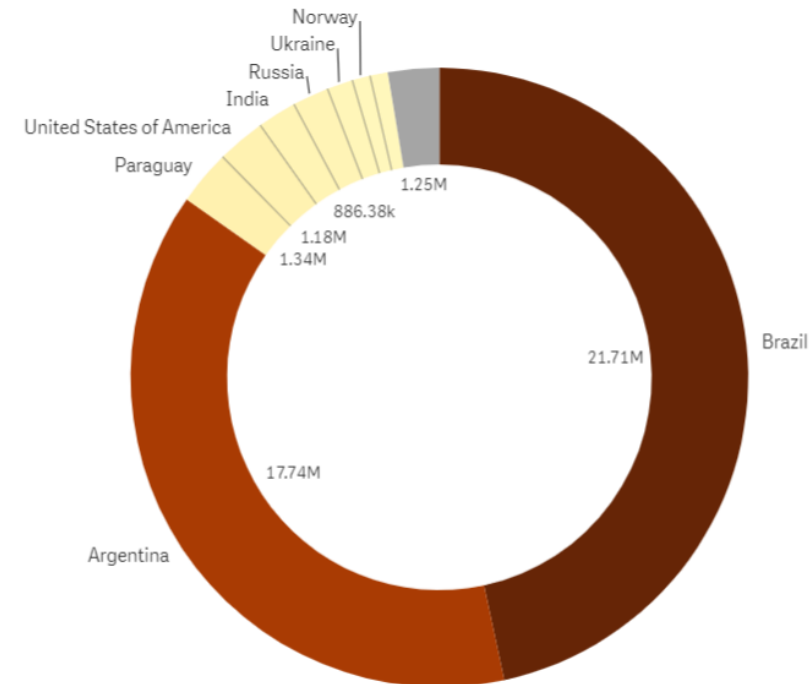
Source: Fertilizers Europe/Eurostat

\* Includes products for agricultural and industrial use

# Supply diversity – Soy (2020-23)

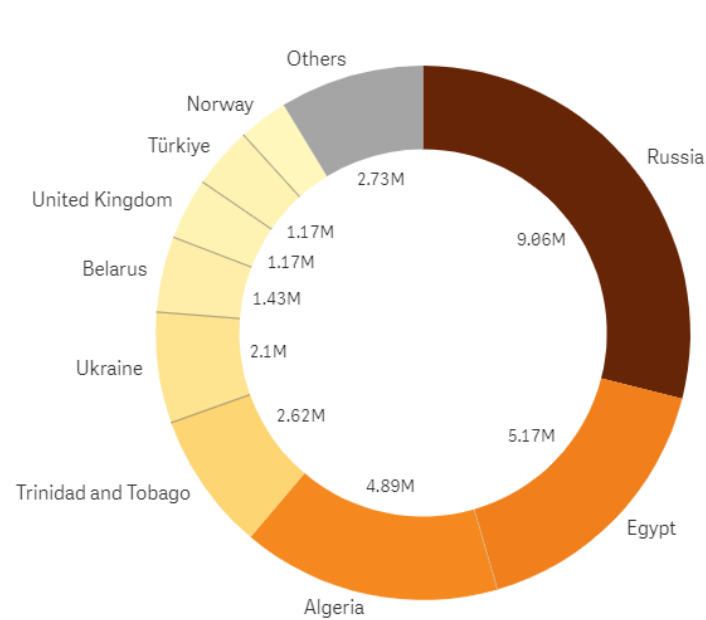


Soya beans

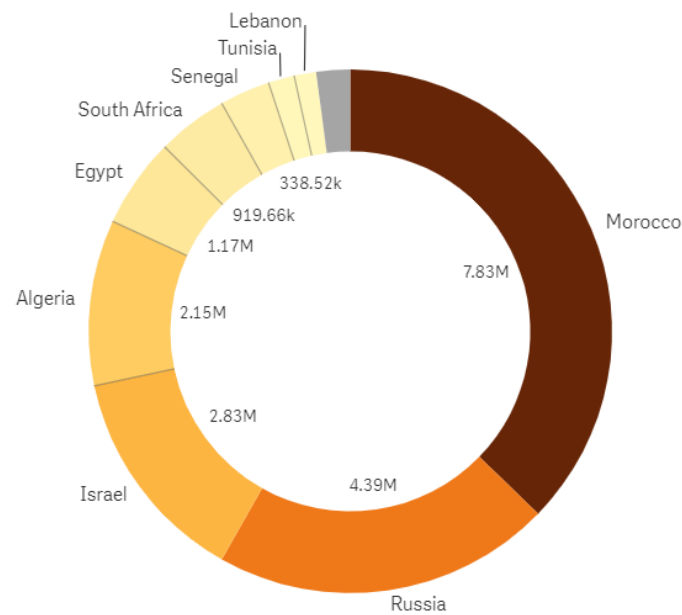


Soya meals

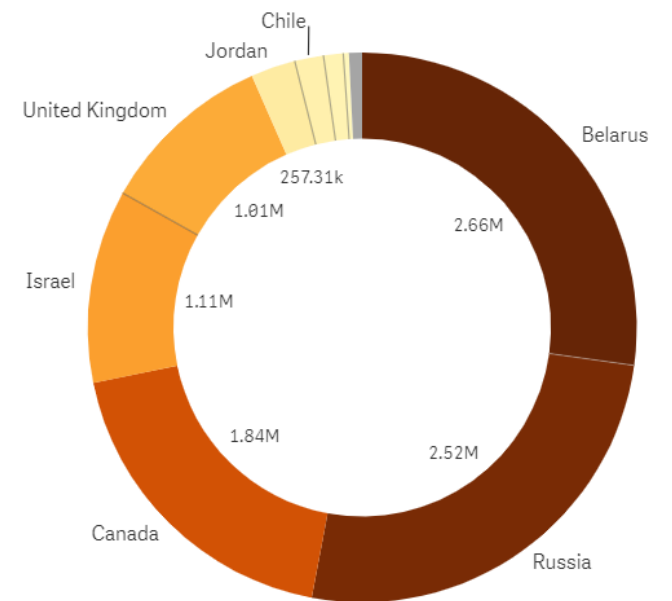
# Supply diversity – fertilisers (2019-21)



N



P



K

# Feed additives dependency on China

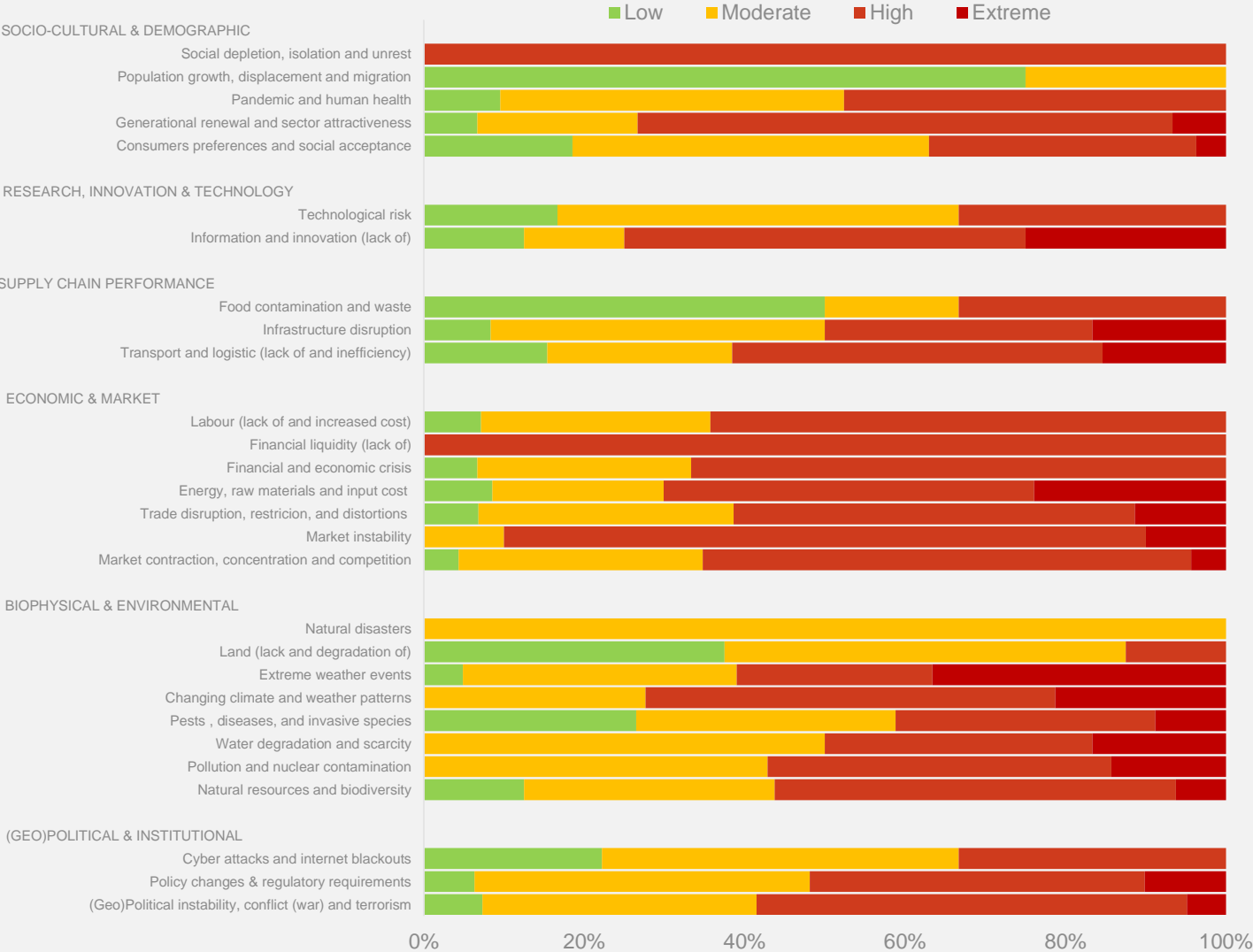
**Table 4. Current estimates of the percentage of global vitamin production from China compared with other countries and regions (data obtained from vitamin industry sources).**

Vitamin	China, %	European Union, %	India, %	Korea, %	Uruguay, %
A	35	65	-	-	-
D <sub>3</sub>	80	10	10	-	-
E	58	42	-	-	-
K (MNB)	78	10	-	-	12
Thiamine (B <sub>1</sub> )	90	10	-	-	-
Riboflavin (B <sub>2</sub> )	50	25	-	25	-
Niacin (B <sub>3</sub> )	37	43	20	-	-
Calcium pantothenate (B <sub>5</sub> )	80	20	-	-	-
Pyridoxine (B <sub>6</sub> )	90	10	-	-	-
Biotin (B <sub>7</sub> )	100	-	-	-	-
Folic acid (B <sub>9</sub> )	100	-	-	-	-
B <sub>12</sub>	100	-	-	-	-
Vitamin C	85		-	-	-

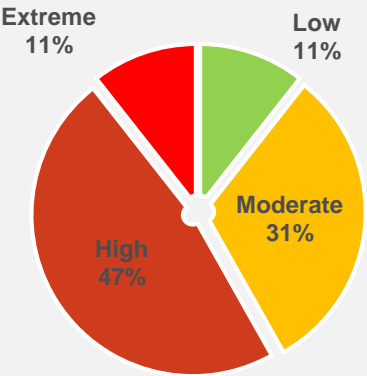
- Source: Shurson & Urriola, 2019  
*„Understanding the vitamin supply chain and relative risk of transmission of foreign animal diseases“*

(draft) Vulnerability to the identified risks

Degree of perceived vulnerability by risk



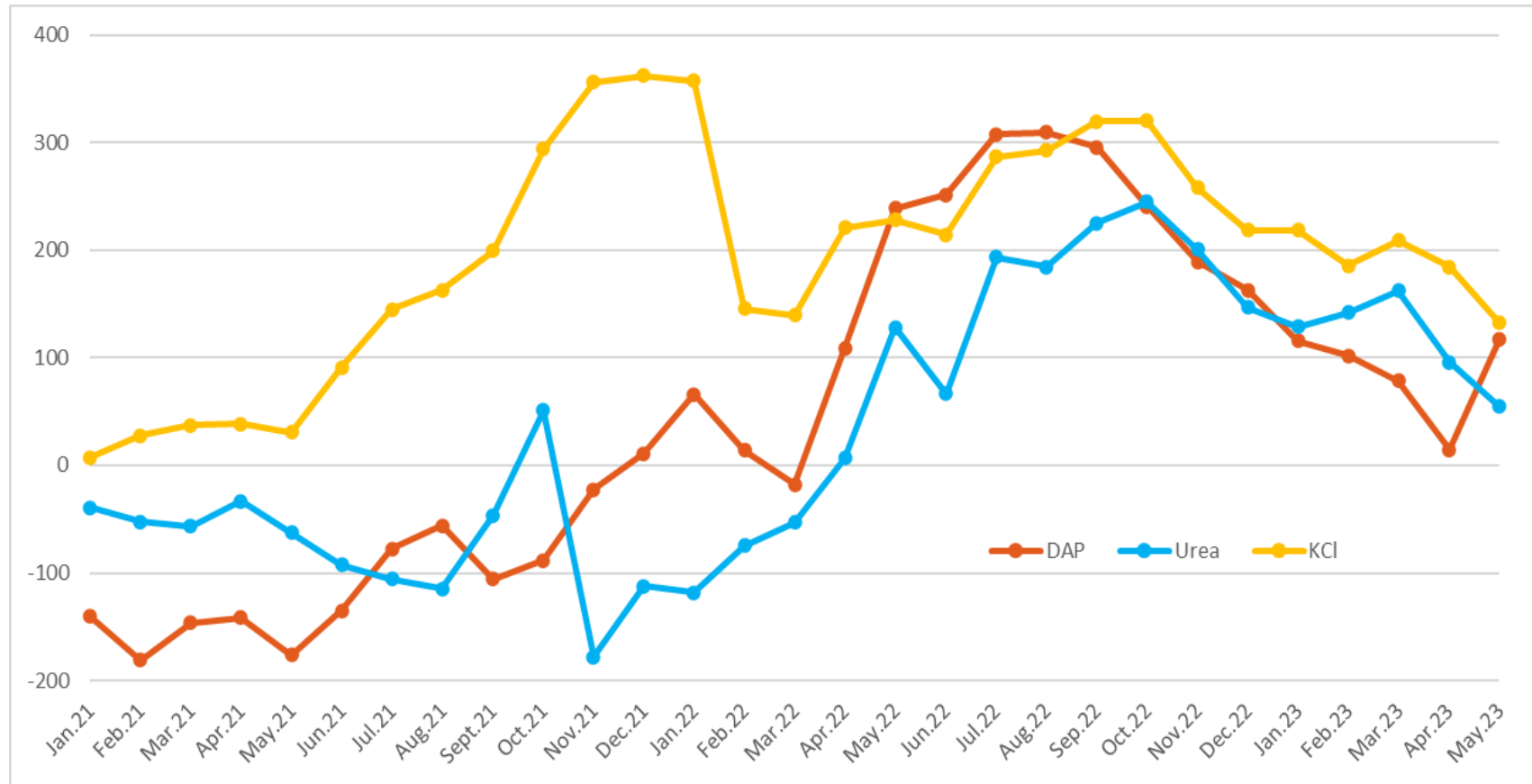
Overall perceived vulnerability by category





# Cost of a shock in dependency situation

*Indicative comparison of fertiliser prices in EU and world market – Prices difference €/t*



Source: World Bank and S&P Global, elaborated by DG AGRI

# Preparedness and response

- CAP and other sectoral policies, incl exceptional measures
- EFSCM
- Single market -> SMEI
- Critical Entities Directive
- Monitoring
- Cooperation and collaboration
- Communication
- Joint purchasing and strategic reserves?

# Sustainable and resilient food systems

- EGD and Farm to Fork
  - Climate change, biodiversity losses, soil degradation, water depletion all have an impact on supply
  - Demand will also shift: food environment, labelling, food waste,... incl from private sector (scope 3 strategies of food and retail industries)
  - There are win-win solutions : ie fertilisers reduction of use, circularity and renewable energies -> improved OSA
  - International dimension : food systems diplomacy, mirror clauses debate (deforestation, antimicrobials, CBAM, MRLs,...)

Thank you