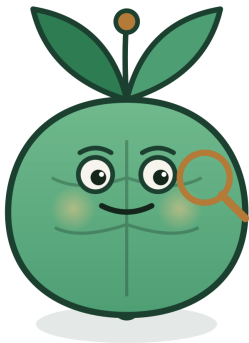


AGRICORTEX EXPLAINERS · NO. 2

# The Great Protein Reversal

Why Europe and India are solving the same problem — from opposite ends.

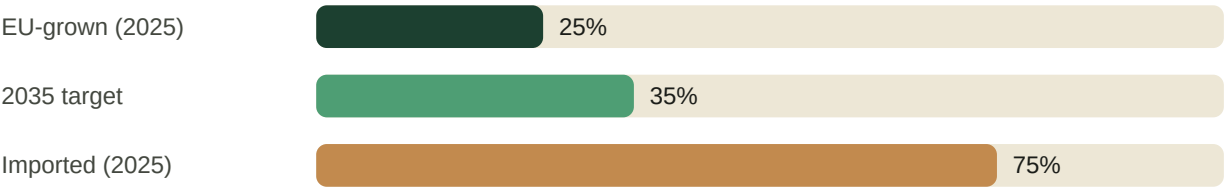


In July 2026, Europe published a **Protein Action Plan** to reduce its dependence on imported protein. India, meanwhile, burns an amount of crop residue each year that could seed a protein economy. Two regions, one realisation: **where protein comes from is now a strategic question**, not just an agricultural one.

## Europe: rich in livestock, poor in feed

The EU’s livestock sector uses roughly **74 million tonnes of protein as feed** per year and leans heavily on imports for the high-protein part. About **94% of its soya protein is imported** — 13.4 Mt in 2024–25, mostly from Brazil, Argentina and the US. Only **25% of the oilseeds and protein crops** it feeds animals are grown at home; the Protein Action Plan aims to raise that to **35% by 2035**.

### EU FEED PROTEIN CROPS — HOME-GROWN vs IMPORTED



Source: European Commission Protein Action Plan & Livestock Strategy (7 July 2026); DG AGRI. Overall EU feed-protein import reliance is ~26% gross, ~15% net of exports; the figures above are specifically for oilseeds & protein crops.

|                                                          |                                                              |                                                         |
|----------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------|
| <div>94%</div> <div>of EU soya protein is imported</div> | <div>13.4 Mt</div> <div>soya protein imported, 2024–25</div> | <div>25% → 35%</div> <div>EU-grown target by 2035</div> |
|----------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------|

## India: burning what Europe pays to import

India generates about **500 million tonnes of crop residue** each year. Much is used for fodder and fuel — but roughly **92 million tonnes is burned** in the fields, a major source of the north’s winter smog. That biomass is feedstock: for fermentation, for bio-based protein, for the domestic input industry India currently lacks. Europe is spending billions to secure protein feedstock; India sets fire to a portion of its own.

### INDIA CROP RESIDUE — GENERATED vs BURNED (Mt / YEAR)



Source: India Ministry of New & Renewable Energy (MNRE); NPMCR. Residue generated is estimated at ~500–550 Mt and burned at ~92 Mt across studies.

### THE REVERSAL — WHY IT MATTERS

Both regions have concluded that protein sovereignty is strategic. Europe is racing to **grow more of its own**; India has the raw material but not yet the industry to **convert it into value**. This is the localisation thesis in two mirrors — and it is why domestic biomanufacturing (fermentation, smart protein, residue valorisation) is the opportunity of the decade for India, and the security priority of the decade for Europe.

### SOURCES & METHOD

European Commission Protein Action Plan & Livestock Strategy, DG AGRI (July 2026); India MNRE / NPMCR (crop residue); European Environment Agency (protein diversification). Figures are indicative and dated; definitions differ across sources, so cross-region comparisons are directional rather than like-for-like. This is independent analysis — no proprietary or client-confidential data, and not investment advice.

An Agricortex explainer by Dr. Nitika Mukhi · agricortex.in · 2026