

Snapshot: Assumptions with Respect to the Medium-term CAP and Meat Consumption Scenarios within the SUPREMA project

Medium-term assumptions on meat consumption

- Shift in meat consumption due to ageing population, concerns with respect to ecological footprints, preference shift of youngsters and preferences towards a healthier consumption: scenario “more healthy and modern (MHM)” starting in 2020

Assumption	Approach
Growing vegetarian numbers *	0.25% increase/annum in countries with already a high share of vegetarians (DE, SW, AU, IT, PL)
	0.50% increase/annum in countries that have a relative low share of vegetarians (all other EU MS)
Reduced meat consumption per capita **	MS with below average consumption follow current trend
	MS with above average consumption decline red meat consumption by 1.0% per annum
	MS with average meat consumption decline red meat consumption by half the amount of ‘above’, or by 0.5% per annum

* MS-average share of vegetarians increases in EU-15 from about 6% to 10.5% (+4.5%), while in the EU-13 it increases from 2.5% till about 8% (+5.5%) ** No compensation by poultry and dairy products considered

Medium-term assumptions on CAP

- The CAP scenario “More value for less money (MVLM)” accounts for a further CAP budget reduction and improvement in its ecological transition with starting shocks in 2023

Assumption	Approach
Budget reduction of CAP budget	Budget reduction by 9% (= 5% + 4% added) <ul style="list-style-type: none"> ⇒ applies linearly to all direct payments, including voluntary coupled support (VCS) (with focus on key sectors B&V, Dairy and Sugar beet) ⇒ <u>Net effect</u>: reduction of coupled support by 9 % (even higher effect on farm incomes which are simulated)
Enhanced conditionality	⇒ EFA’s part of the enhanced conditionality (EnC)
	⇒ Current generic level of EFA (5%) will apply as minimum rate for EnC
	MS can/should impose eco-schemes: <ul style="list-style-type: none"> ⇒ This leads to an additional 2% of land which can be counted as EFA-area ⇒ <u>Net effect</u>: increase of the (effective) EFA area from about 3% to 7% (or a change of +4% to the current values used in the models)