FEED & FOOD

2020

FEFAC
Experts in Animal Nutrition

ABOUT FEFAC

The European Feed Manufacturers' Federation (FEFAC) was founded in 1959 by five national compound feed associations from France, Belgium, Germany, Italy and the Netherlands. Today, FEFAC membership consists of 25 national associations in 24 EU Member States and the UK (full members) as well as associations in Switzerland, Turkey, Norway, Serbia and Russia (observer / associate members). FEFAC is the only independent spokesman of the European Compound Feed and Premix Industry at the level of the European Institutions. FEFAC is member of IFIF and holds observer status in CODEX Alimentarius.

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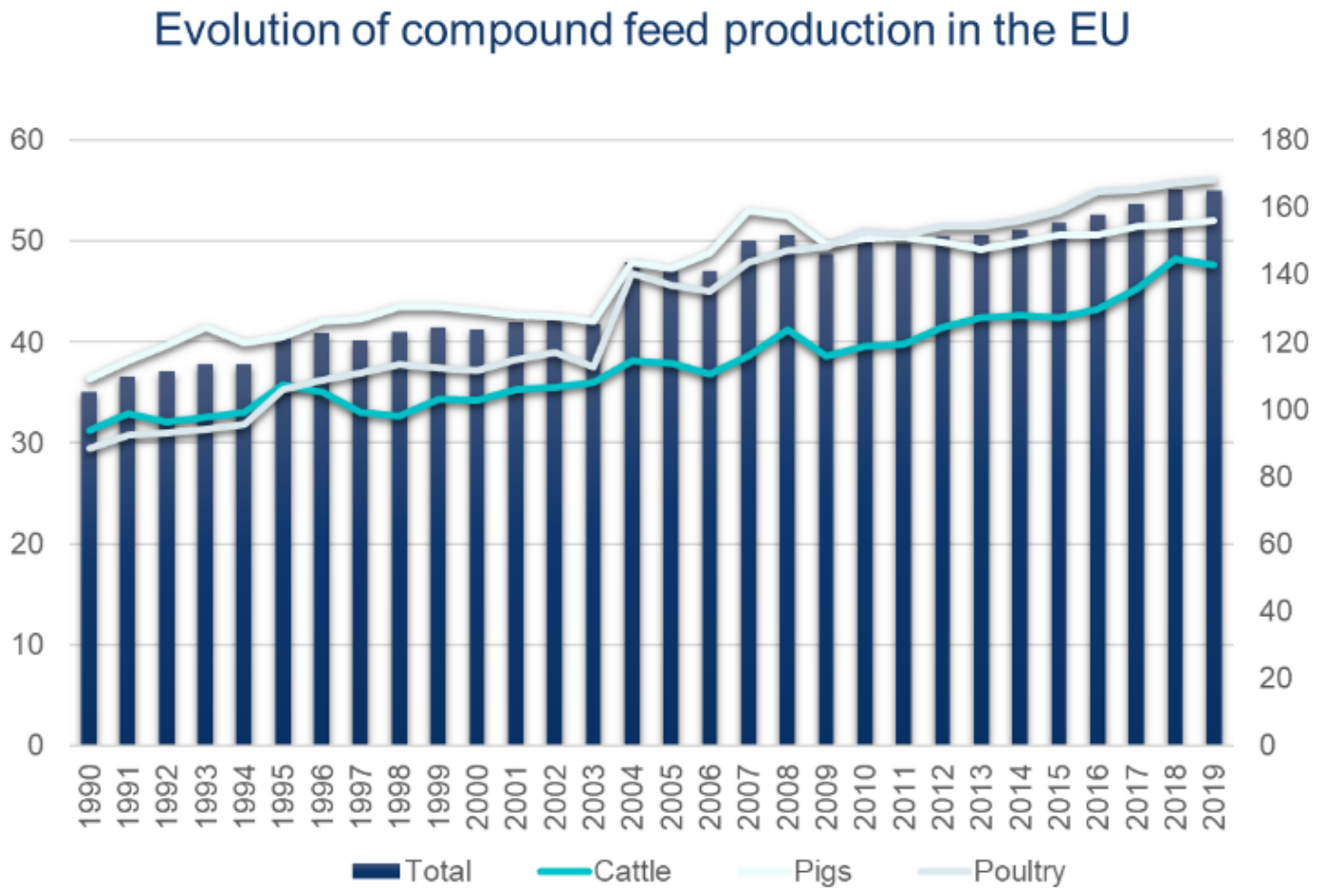
TABLE OF CONTENTS

INTRODUCTION

This publication aims to provide an overview on the European feed sector's economic development, focusing on the feed industry role in an integral part of the EU feed and food supply chain and its contribution to the European livestock and aquaculture economy.

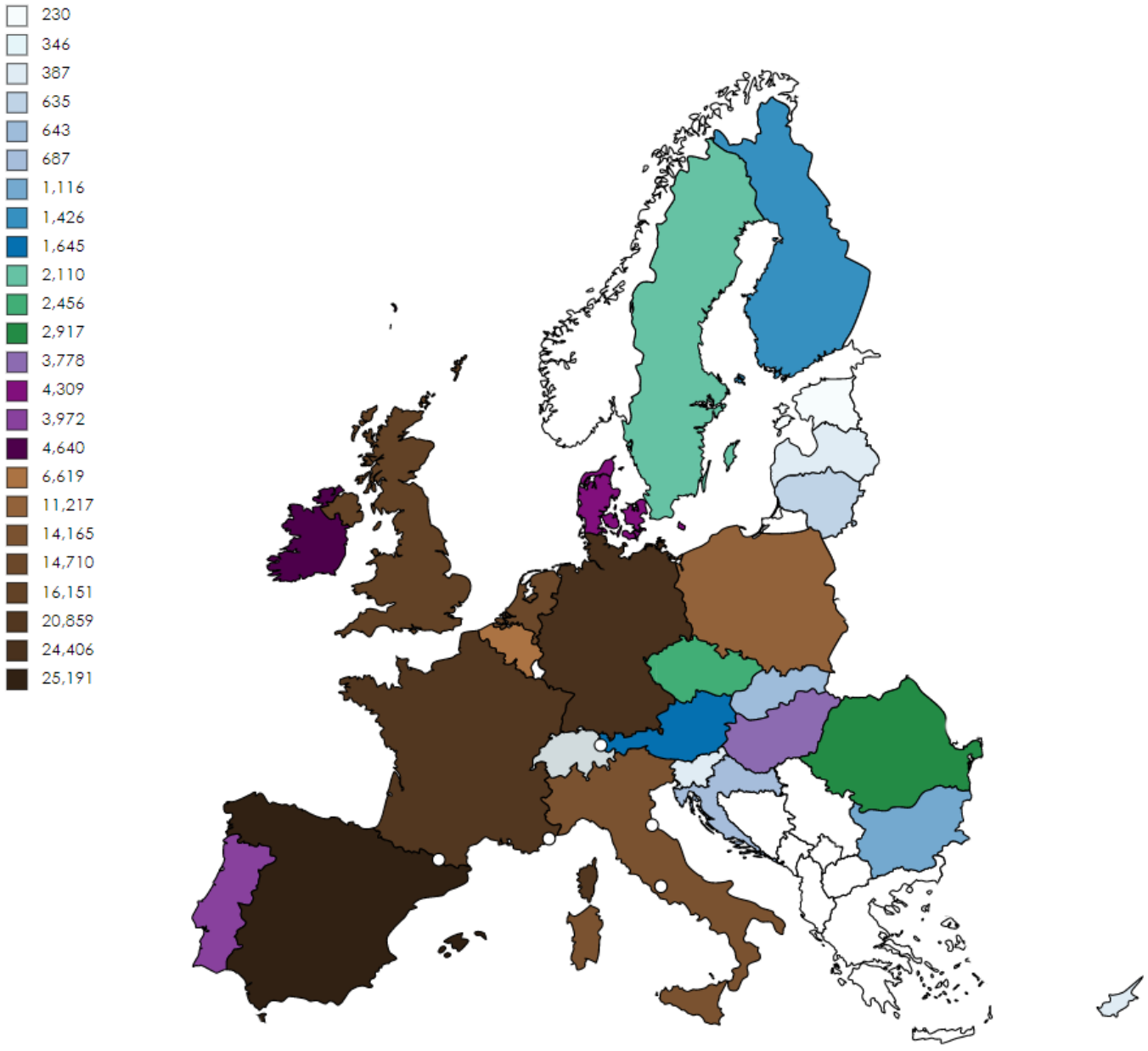
The industrial compound feed industry is a dynamic sector with stable growth over the past years, reflecting the increasing reliance of livestock and aquaculture farmers in efficient compound feed to meet high performance and quality requirements, while consumption of animal products remained relatively stable.



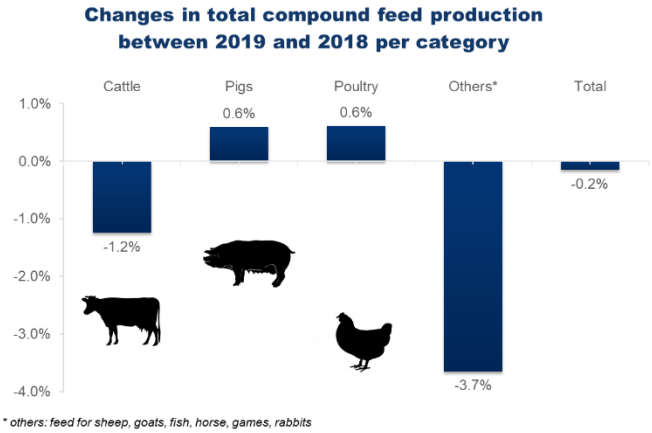
Source: FEFAC

FEED

EU COMPOUND FEED INDUSTRY 2019 (1000 t)



The compound feed production in the EU-28 in 2019 reached 164.9 mt.[1], i.e. a decrease by 0.2% compared to 2018, according to data provided by FEFAC members.

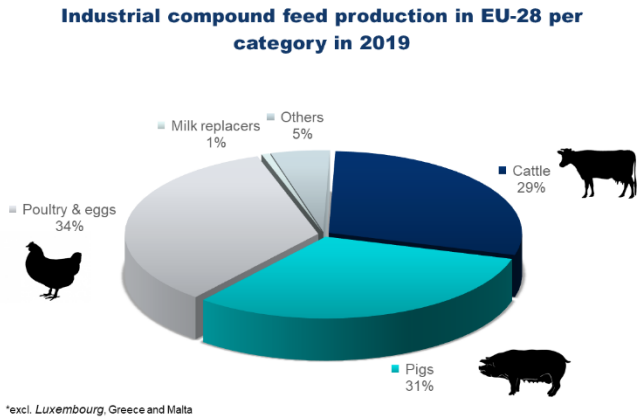


Source: FEFAC

Favourable weather conditions in 2019 meant a return to normal cattle feed demand patterns, meaning a decrease of -1.2% compared to 2018. The extraordinary growth level in 2018 was caused indeed by exceptional drought and heat waves across Europe severely impacting forage production and thus leading to a significant increase in the compound feed demand in certain regions. For 2019, the biggest decrease in cattle feed demand was reported in Ireland (-18%), Slovenia (-6.8%), the UK (-6.5%) and, to a lesser extent, in the Netherlands (-1.1%) where increasing restrictions on phosphorus emissions led to a decrease of cattle herd size and thereby to a fall of the demand for cattle feed.

Despite growing export opportunities in 2019 (e.g. trade dispute between China and the US, prevalence of African Swine Fever in many Asian countries), the EU pork production increased moderately, pulling up feed demand by only 0.6 %. Outbreaks of ASF on commercial farms triggered dramatic production step back in pigfeed production, especially in Romania and Bulgaria. On the other hand, the biggest increases in pig feed demand were recorded in Portugal (+10%) and Spain (+5%).

Poultry feed production increased by just 0.6% which was below the rise in poultry meat production that reached +1.3%. This difference may be attributed partially to feed efficiency gains. Increase was mostly driven by the development of poultry production in Austria, Sweden, Portugal and Spain recording a growth of app. 5%. In certain countries, the demand for laying hens feed dropped dramatically (e.g. -23% for Belgium) mainly because of the spread of Avian influenza. Poultry feed production remains the leading segment of EU industrial compound feed production, well ahead of pig feed.

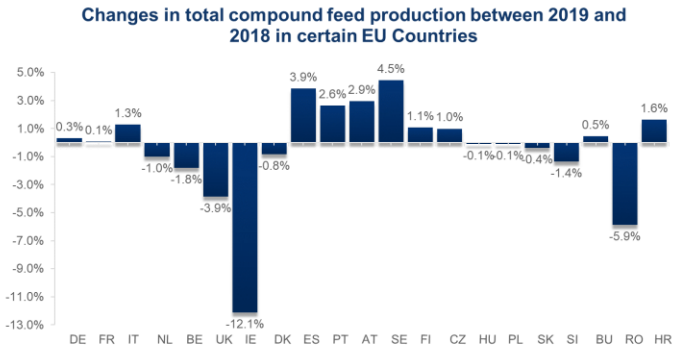


Source: FEFAC

Sweden was the best performing country, with an annual growth of +4.5% for the total compound feed production, boosted equally by the demand for cattle and poultry compound feed. Among the largest compound feed producing countries, France, Germany, Poland and Italy maintained their production of compound feed, whereas the Netherlands recorded a drop in feed production of -1.0%. Spain increased its production by 3.9%, while the UK stepped back by almost 4%. Germany,

[1] Figures on the production of dry petfood by compound feed manufacturers are not included in our statistics of compound feed production because they do not provide a meaningful representation of the petfood market.

Spain and France remain the three leading EU countries in terms of total compound feed production. Spain is the leading cattle and pig feed producer while France maintains its leading position as poultry feed producer.



Source: FEFAC

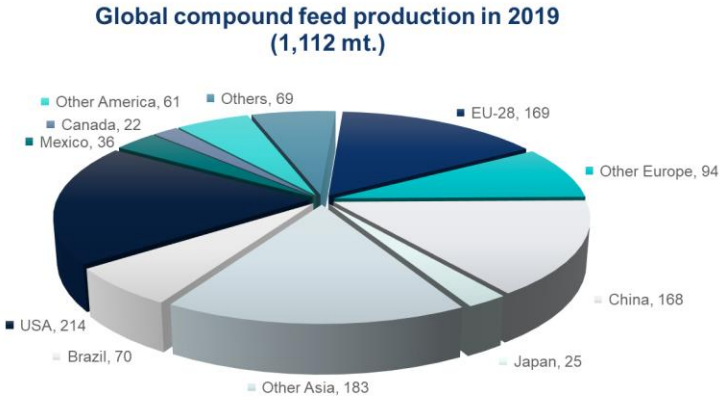
The compound feed industry has become capital intensive in recent years and makes use of a very high level of technology. Advanced methods are used to formulate feeds according to the demands of the livestock farmer – which reflects final consumers' demand and to control the raw materials used, the manufacturing process and the quality of the finished feeds.

FEEDING EU LIVESTOCK

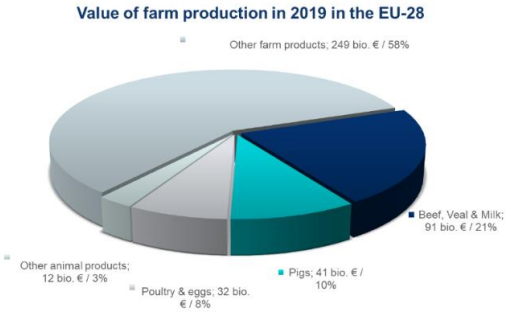
The value of livestock production – amounting to €177 billion – accounts for 42% of the total value of farm production. More than half of it amount (91 bio €) is then created by beef & veal, and dairy animal products, followed by pigs, poultry & eggs and other animal products (i.e. sheep, goats, etc.). The overall EU 28 agricultural output production was €426 billion in 2019.

The compound feed industry is subject to a complex body of both EU and national legislation affecting almost every part of its operation. This legislation is designed to ensure that feeds are of high quality and are safe for both livestock and consumers.

The EU compound feed production represents 15% of the global production that is estimated at around 1,112 mt. progressing by 2.1% vs. 2018.

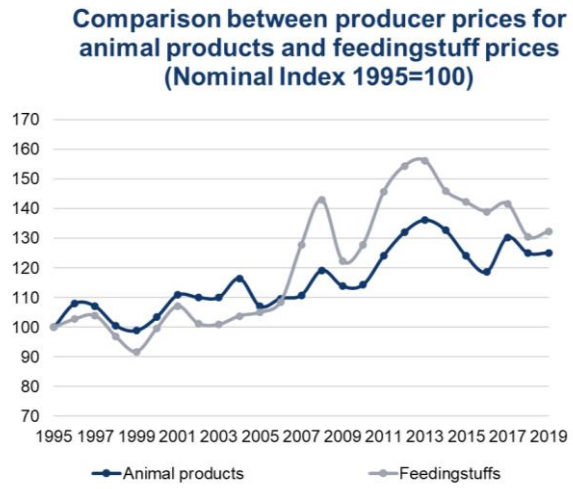


Source: FEFAC



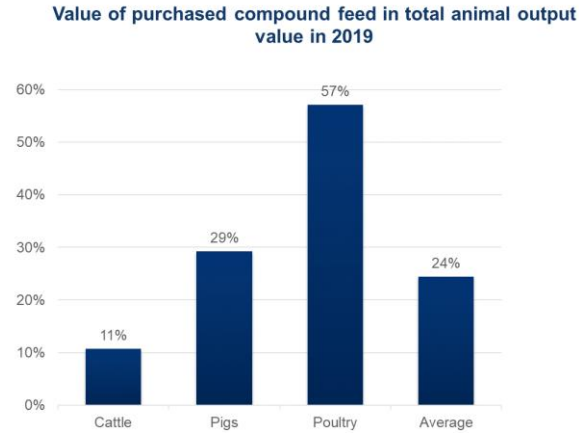
Source: FEFAC based on Eurostat

Feed costs have increased more than producer prices over the last 25 years, confirming a general trend of a permanent pressure our on livestock farmers to improve their productivity and on compound feed producers to deliver efficient compound feed.



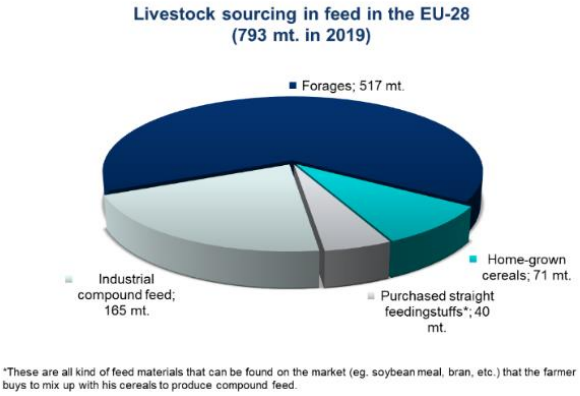
Source: FEFAC based on Eurostat

Animal feed is the most important livestock production cost factor and represented in 2019 up to 57% of the farm gate value of poultry, 29% of the farm gate value of pigs and 11% of the farm gate value of cattle.



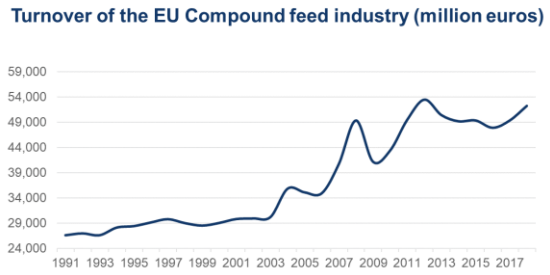
Source: FEFAC based on Eurostat

The EU 28 farm animals are fed with app. 793 mt. of feed, including feed materials and compound feeds. Out of this quantity, 517 mt. are roughages of farm origin. The balance, i.e. 276 mt. of feed, includes cereals grown and used on the farm of origin (71 mt.) and feed purchased by livestock producers to supplement their own feed resources (either feed materials or compound feed). In 2019, 165 mt. of compound feed were produced by EU compounders, accounting for 21% of all purchased feedingstuffs.



Source: FEFAC based on Eurostat

Turnover of the EU-28 industrial compound feed industry was 52 billion euros in 2019 which has increased by 28% since 2007.



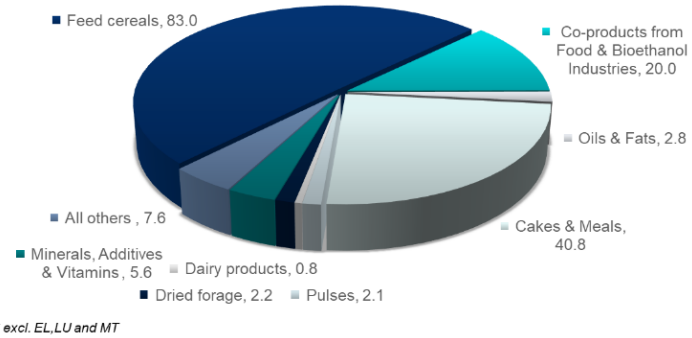
Source: FEFAC

CONSUMPTION OF FEED MATERIALS

Compound feeds are manufactured from a mixture of feed materials designed to achieve predetermined performance objectives among animals. These feed materials are obtained from a wide variety of sources, primarily of EU origin: cereals, oilseeds and pulses and also a significant amount of co-products of the food and biofuel industry. Other ingredients, in particular feed materials rich in proteins like soybean meal, are not produced in sufficient quantity in the EU and must be imported from third countries. These diverse sources of feed material supplies are an important factor in the industry's ability to manufacture feeds of both high quality and at competitive prices for livestock farmers.

In 2019, the EU compound feed industry produced 164.9 mt. of feed, consuming 83 mt. of feed cereals, 40.8 mt. of cakes and meals, 20 mt. of co-products from food & bioethanol industries, 5.6 mt. of minerals, additives & vitamins, 2.8 mt. of oils & fats, 2.2 mt. of dried forage, 2.1 mt. of pulses and 7.6 mt. t. of all others (e.g. straw, former foodstuffs etc.).

EU* Feed material consumption by the compound feed industry in 2019 164,9 mt.

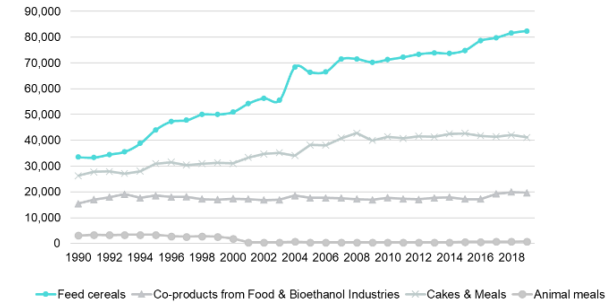


** excl. EL,LU and MT*

Source: FEFAC

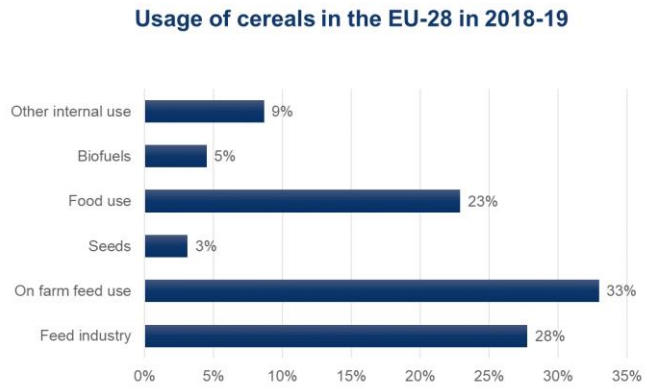
Over the last 10 years, the consumption of feed materials remained relatively stable as for the proportion of feed cereals (50%) and co-products of the food and bioethanol industry (12%). A slight decrease was recorded in the consumption of oilseed meals (from 28% down to 25%), due in particular to a trend to further reduce the levels of crude proteins in feed for farmed animals. The use of processed animal proteins (PAP), which in the past represented up to 2% of feed materials, was banned in 2001 in the EU for most species and mainly replaced by soybean meal and amino-acids. Since 2013, non-ruminant PAPs can be used legally again in fish feed.

Development of raw materials consumption by the EU compound feed industry (1 000 t)



Source: FEFAC

The EU livestock is the most important outlet for EU-produced cereals with 61% of the internal usage. Up to 33% of cereals consumed in the EU-28 are directly used by farmers to feed their animals. In addition, 28% of cereals are used by the industrial compound feed industry. The food industry represented 23% of internal uses, followed by industrial use (14%) and seeds (3%).

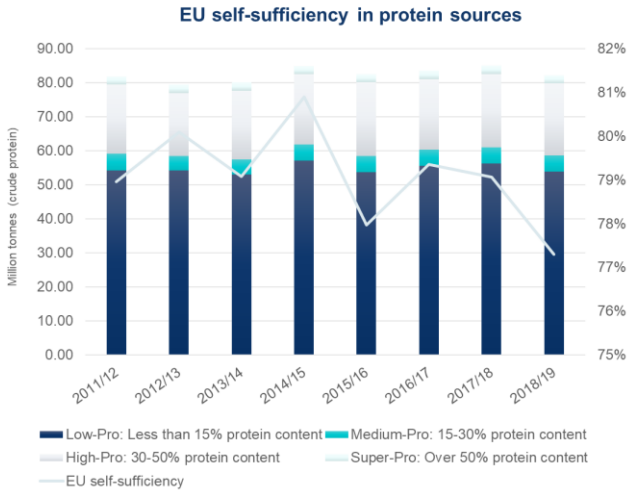


Source: FEFAC based on DG AGRI market balance sheets

In the feed sector, it is relevant to split different protein sources into several categories:

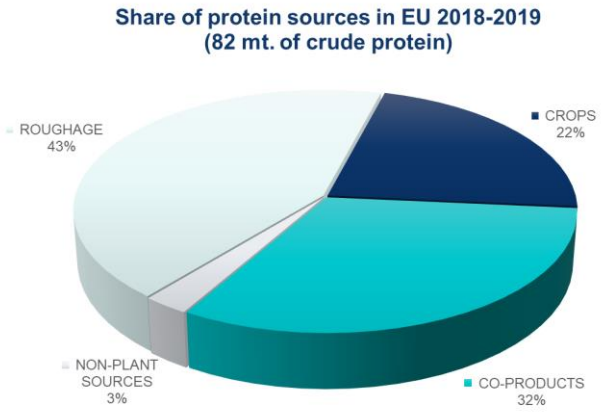
- Low-pro: less than 15% protein content
- Medium-pro: 15-30% protein content
- High-pro: 30-50% protein content
- Super-pro: over 50% protein content

The EU has a low self-sufficiency in high protein feed sources (e.g. oilseed meals), i.e. 29% in 2018/19. For other categories of protein-rich feed materials, the self-sufficiency ratio is high: 96% for low-protein feed sources, 83% for medium-protein feed sources and 85% for super-protein feed sources. During the first years of the last decade, the total EU self-sufficiency in protein-rich feed materials continued to grow thanks to the expansion of the biofuel industry and the generation of co-products rich in proteins like Dried Distillers' Grains and Solubles (DDGS), and rapeseed meal. However, for several years now, the trend has been reversing.



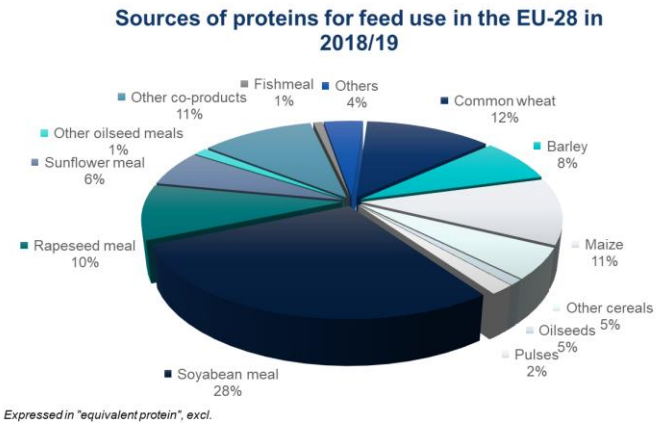
Source: FEFAC based on EU feed protein balance sheets

Roughages, such as grass and silage maize, is the most important source of proteins (43% of the supply, expressed in protein equivalent) for the EU livestock sector, followed by co-products (32%), crops (22%) and non-plant sources (3%) such as whey powder and former foodstuffs.



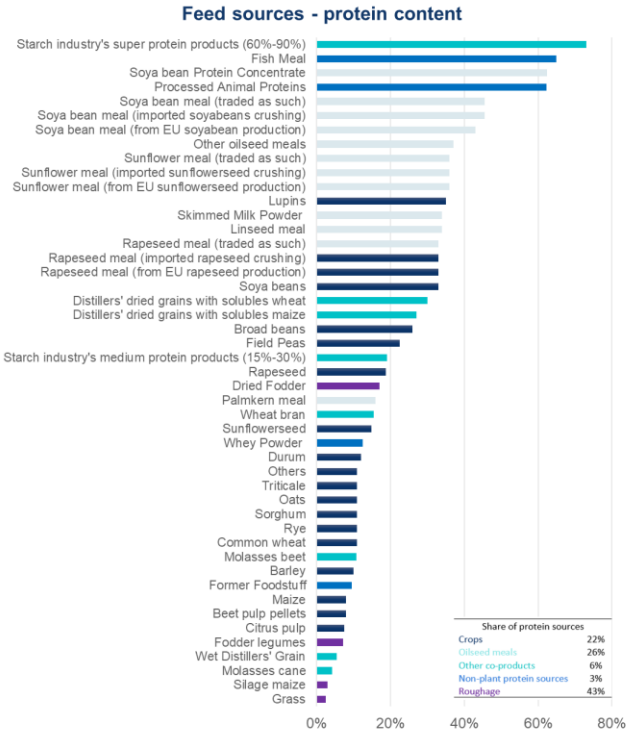
Source: FEFAC based on EU feed protein balance sheet 2018/19

With roughages excluded, up to 38% of the protein supply stems from EU produced cereals and 11% from co-products (i.e. molasses, beet pulp pellets, starch industry protein products, distiller dried grains with soluble etc.).



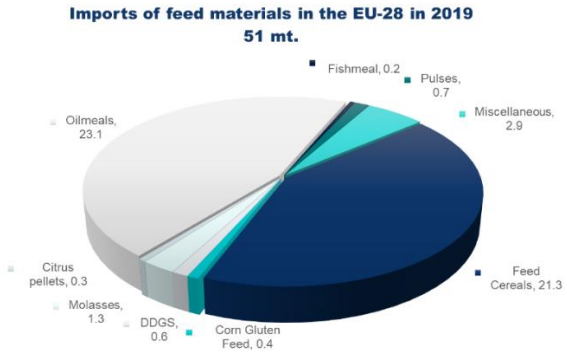
Source: FEFAC based on EU feed protein balance sheet 2018/19

Potato proteins (>70%) and fish meal (65%) are the richest feed sources in proteins. Cereals, although low in proteins (10.7%) represent altogether 21% of the protein supply. Economically and nutritionally, the oilseed meals are one of the best protein sources to be used in feed both in terms of concentration in proteins (16 to 45.5% depending on the oilseed) and quality (amino acid profile). Altogether, oilseed meals account for 26% of the protein supply, against 6% for other co-products, such as DDGS, maize gluten feed, etc. Roughages, the largest provider of proteins in total volume, show low content of proteins in general (4.2%).



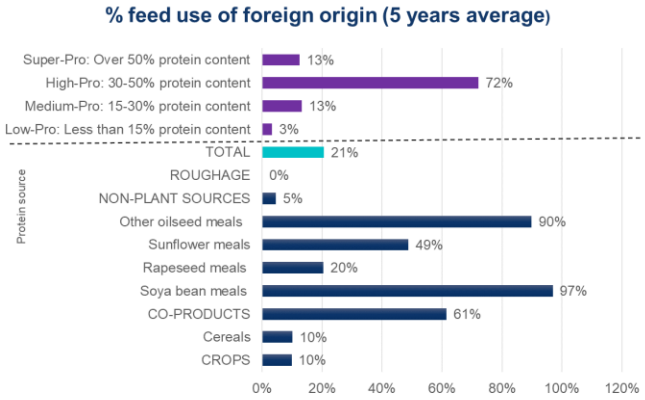
Source: FEFAC based on EU feed protein balance sheet 2018/19

In 2019, the EU-28 imported up to 51 mt. of feed materials mainly oilseed meals (23 mt.), thereof soybean meal (17.8 mt.) and feed cereals (21.3 mt.), most of it being maize (17.4 mt.). In smaller amounts, the EU sourced molasses (1.3 mt.), DDGS (0.6 mt.), corn gluten feed (0.4 mt.), pulses (0.7 mt.), citrus pellets (0.3 mt.), fishmeal (0.2 mt.) plus 2.9 mt. of other feed materials (2.9 mt.).



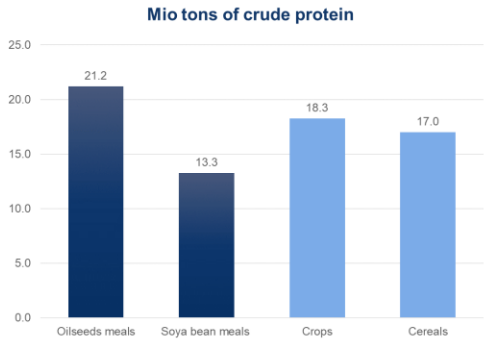
Source: FEFAC based on Eurostat

The EU is mostly dependent on import of high protein content (30-50% protein content) feed sources (72%), mainly co-products (61%) sourced from Third Countries from crops not grown significantly in the EU (soybean meals, linseed meal, palm kernel expeller, etc.). However, it is important to remind that 79 % of total feed proteins are produced within the EU. Roughage is the only feed protein source for which the EU is 100% self-sufficient. The EU is also almost self-sufficient in cereals production (90%).



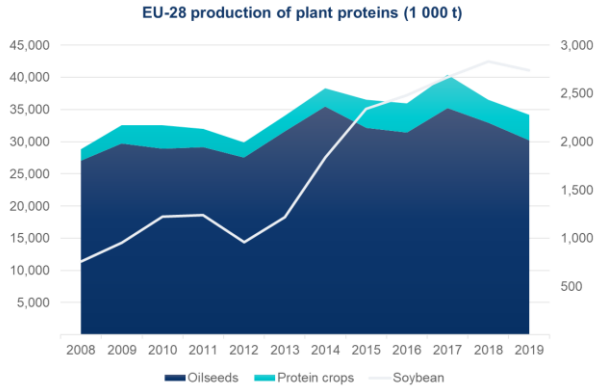
Source: FEFAC based on EU feed protein balance sheet 2018/19

There is a limited interchangeability between the proteins from different vegetable sources. High – protein content feed materials (30 – 50 %) such as soybean meal with its amino acids profile are most appropriate to meet the animal's protein requirements. The contribution of cereals to the protein supply should, however, not be underestimated: in 2018/19, the cereals provided 17 mt. of crude protein vs. 13.3 mt. for soybean meals and 21.2 mt. for all oilseed meals).



Source: FEFAC based on EU feed protein balance sheet 2018/19

In 2018, the European Commission published a report on the development of plant proteins in the European Union, analysing the EU plant protein sector and showing its dynamical development in recent years. The EU soy production grew by 187% from almost 1 mt. in 2009 to 2.7 mt. in 2019.



Source: FEFAC based on DG AGRI market balance sheets

According to the European Commission the increase in plant protein production in the EU during recent years is not only thanks to food segments demand but also premium feed. JRC[2] estimated that up to 11% of total feed in the EU-28 in 2012 was marketed as « non-GM ». A FEFAC internal survey in 2019 showed that the

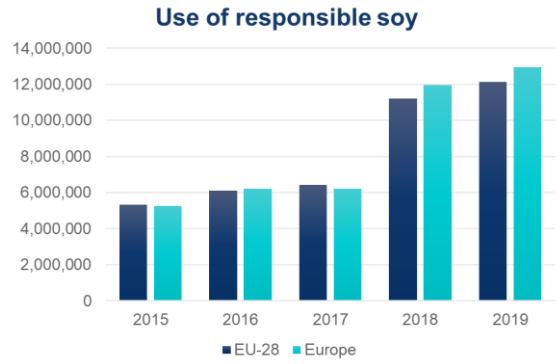
2 https://publications.jrc.ec.europa.eu/repository/bitstream/JRC95457/report.pdf

percentage could continue to rise even after the demand for « non-GM » feed in Ireland and the UK disappeared (28% and 38% of non-GM feed for poultry).

Share of « non-GM » feed in selected Member states 2019			
Member State	**Poultry**	**Pork**	**Cattle (dairy)**
Germany	90%	<5%	60%
Hungary	10%	11%	9%
France	21%	14%	16%
Sweden	100%	100%	100%
Austria	100%	<10%	100%
Poland	<5%	<5%	75%
Denmark	<5%	<5%	30%
Belgium	<5%	<1%	15%
Finland	25%	50%	100%

Source: FEFAC

The European feed industry is by far the most important consumer of plant proteins in the EU, especially of soybean meal. FEFAC´s internal monitoring shows that the EU compound feed industry used up to 12 mt. of responsible soy meeting the criteria of the 2015 version of the FEFAC Soy Sourcing Guidelines, which is 49 % of the soy used in industrial compound feed, and an increase by 138 % compared to 2015. Responsible soy is soy provided through supplier and member schemes and programmes that are compliant with the 59 criteria of the FEFAC Soy Sourcing Guidelines, covering good agricultural practice, environmental and social requirements. As of December 2019, 19 schemes have passed the benchmarking process against the Soy Sourcing Guidelines, facilitated by ITC.



Source: FEFAC

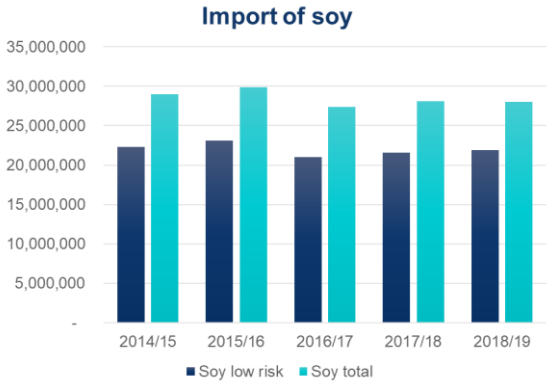
In 2018/19 the EU imported 27.9 mt. of soybean meal equivalent. FEFAC, based on EU trade statistics, estimates the EU feed industry exposure to soybean meal originating from deforestation-risk areas (Brazil – Cerrado, Argentina – Gran Chaco, Paraguay – Western region) at 16 % for soybean meal produced from soybeans imported in the EU and at 26% for direct SBM imports.

EU import of soy from negligible deforestation-risk areas						
Raw material	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20
soybean meal	77%	78%	80%	79%	84%	77%
soybeans	77%	77%	74%	75%	74%	74%
Soy* (t)	22.301.857	23.168.002	21.546.402	21.694.637	22.243.653	21.433.985

* in soybean meals equivalent

Source: FEFAC

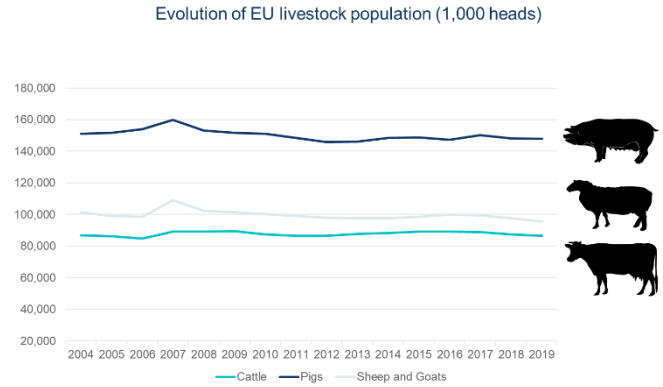
This means that around 21 mt. of soybean meals equivalent came from negligible deforestation risk areas. Compared to previous marketing years, the EU increased imports from negligible deforestation-risk areas (as e.g. result of the EU-US Joint Statement on soy trade on 25 July 2018) which contributed to the positive development of the use of soy from negligible deforestation-risk areas.



Source: FEFAC based on DG AGRI market balance sheets

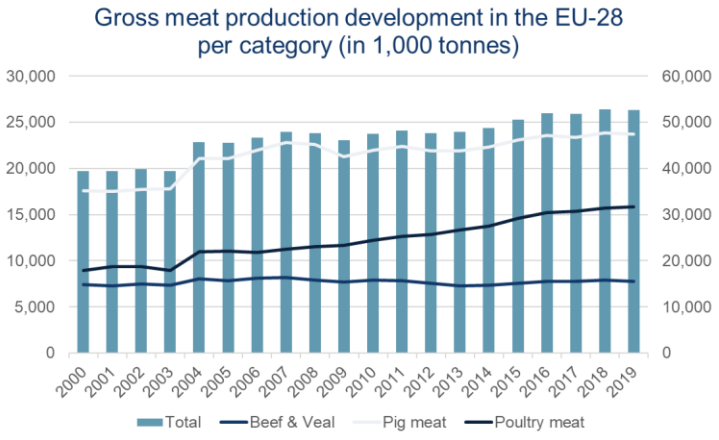
FOOD

The market for feedingstuffs depends on the market for livestock products. In 2019, the livestock population numbers continued to decrease in the EU-28. Compared to the previous year, the population of cattle decreased by 1 %, pigs by 2 % and sheep & goats by 5%.



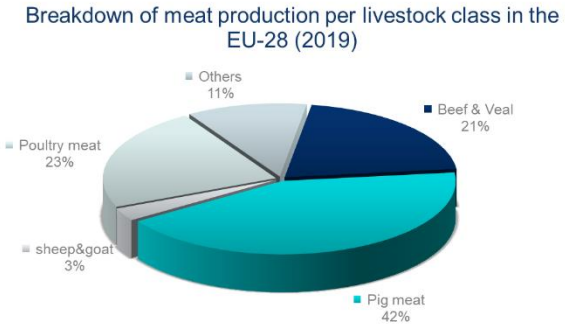
Source: FEFAC based on Eurostat data

In 2019, the production of meat in the EU-28 slightly decreased by 0.3 % to total 52.7 mt. (carcass weight) compared to last year. Poultry production grew by 0.9% while pig and beef & veal production decreased respectively by 0.5 % and 2.2%.



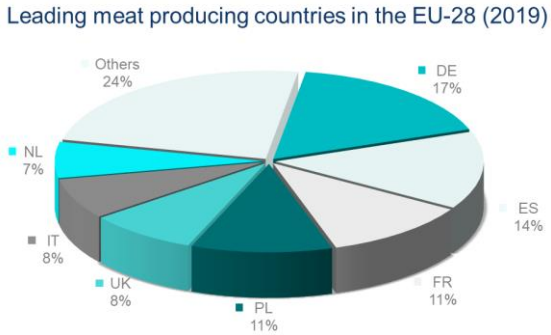
Source: FEFAC based on Eurostat and AVEC poultry data

45% of the EU meat production is pig meat in the EU-28. Poultry comes second with 30% share, followed by beef & veal (15%) and sheep & goat meat (1%).



Source: FEFAC based on Eurostat and AVEC poultry data

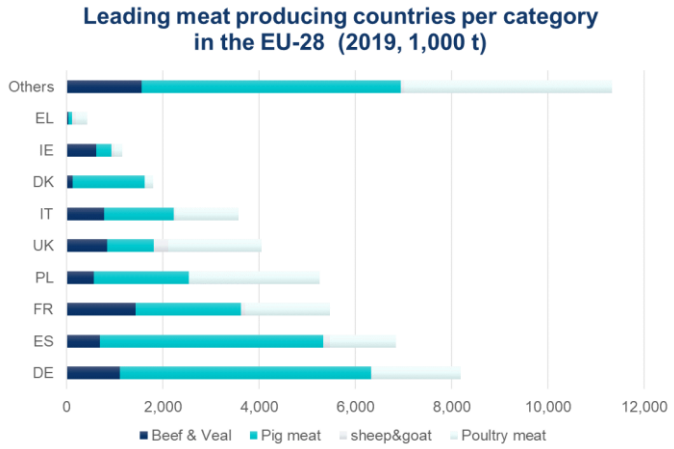
Germany, with its share of 17%, is the EU-28 leading meat producing country, followed by Spain (14%). Third place is shared by Poland and France (11%). The United Kingdom, Italy (8%) and the Netherland (7%) are also important meat producers in the EU-28.



Source: FEFAC based on Eurostat and AVEC poultry data

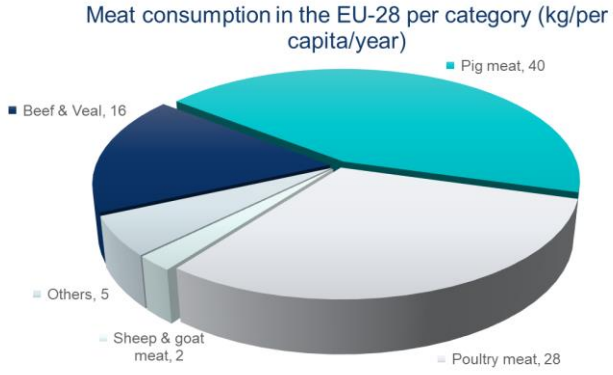
In 2019, Germany was the EU-28 leading country in pig meat production (5.2 mt.), followed by Spain (4.6 mt.) and France (2.2 mt.). Poland, with its 2.7 mt., was the biggest producer of poultry meat, followed by the UK (1.9 mt.) and Germany (1.8 mt.). France

produced 1.4 mt. of beef & veal meat and as such became the leading EU-28 producing country in this sector, followed by Germany with 1.1 mt.



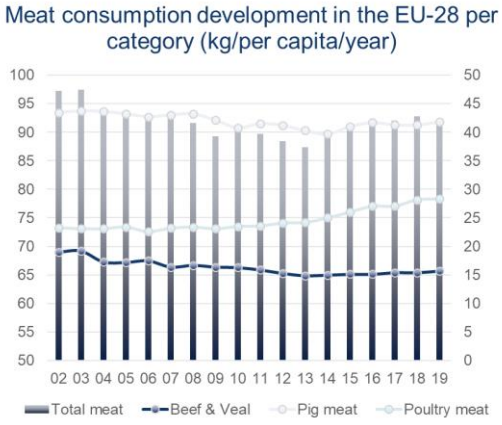
Source: FEFAC based on Eurostat and AVEC poultry data

Pig meat is the most consumed meat in the EU-28 with 40 kg/capita/year in 2019, followed by poultry meat with 28 kg/capita/year and 16 kg/capita/year for beef & veal.



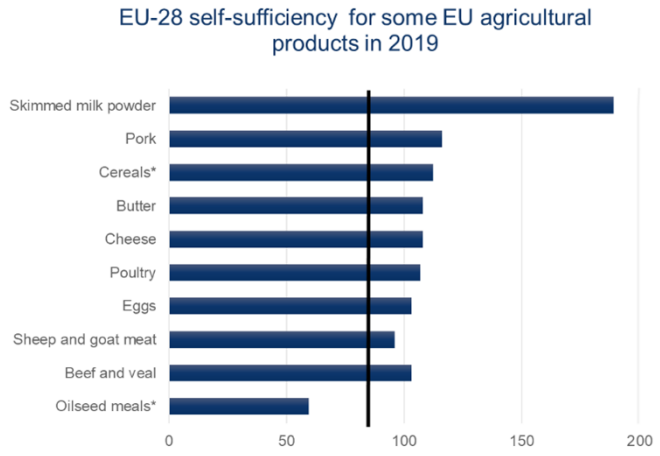
Source: FEFAC based on DG AGRI shorterm outlook - autumn 2020

Average per capita consumption of meat (including horse meat, rabbits and offals) in 2019 was 91 kg, which is two kilograms less compared to the previous year.



Source: FEFAC based on DG AGRI shorterm outlook - autumn 2020

The EU is self-sufficient in livestock products in volumes, in particular pig meat and dairy products, and in sugar.



Source: FEFAC based on DG AGRI shorterm outlook - autumn 2020.

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STATISTICAL ANNEX

Table 1: EU Industrial compound feed production (1 000 t)

COUNTRY	CATTLE			PIGS			POULTRY			TOTAL***		
	2018	2019	%TAV	2018	2019	%TAV	2018	2019	%TAV	2018	2019	%TAV
DE	7.412	7.440	0,4	9.724	9.778	0,5	6.406	6.408	0,0	24.328	24.406	0,3
FR	5.413	5.401	-0,2	4.918	4.964	0,9	8.699	8.644	-0,6	20.845	20.859	0,1
IT	3.314	3.377	1,9	3.731	3.745	0,4	5.870	5.975	1,8	13.985	14.165	1,3
NL	4.553	4.502	-1,1	5.106	5.029	-1,5	4.101	4.045	-1,4	14.860	14.710	-1,0
BE	1.411	1.447	2,6	3.529	3.504	-0,7	1.368	1.220	-10,8	6.740	6.619	-1,8
UK	5.695	5.324	-6,5	2.052	2.168	5,7	7.225	7.191	-0,5	16.798	16.151	-3,9
IE	3.807	3.116	-18,2	712	706	-0,8	632	631	-0,2	5.279	4.640	-12,1
DK	1.043	1.071	2,7	2.417	2.362	-2,3	673	677	0,6	4.345	4.309	-0,8
ES	9.178	9.362	2,0	10.589	11.119	5,0	4.314	4.530	5,0	24.256	25.191	3,9
PT	1.059	983	-7,2	973	1.074	10,4	1.559	1.638	5,1	3.826	3.927	2,6
AT	585	605	3,4	251	252	0,4	608	651	7,1	1.598	1.645	2,9
SE	931	981	5,4	339	341	0,6	676	718	6,2	2.020	2.110	4,5
FI	670	693	3,4	238	222	-6,7	383	385	0,5	1.411	1.426	1,1
CY**	131	200	52,7	37	5	-86,5	47	42	-10,6	341	387	13,5
CZ	525	563	7,2	764	759	-0,7	1.065	1.062	-0,3	2.432	2.456	1,0
EE	40	40	0,0	140	140	0,0	48	48	0,0	230	230	0,0
HU	377	380	0,8	1.319	1.342	1,7	1.944	1.913	-1,6	3.782	3.778	-0,1
LV	64	64	0,0	66	66	0,0	202	202	0,0	346	346	0,0
LT	155	155	0,0	31	31	0,0	272	272	0,0	635	635	0,0
PL	1.190	1.227	3,1	2.465	2.417	-1,9	6.815	6.905	1,3	11.228	11.217	-0,1
SK	187	188	0,5	247	245	-0,9	199	198	-0,5	645	643	-0,4
SI	90	84	-6,8	43	43	-1,0	246	246	0,1	392	387	-1,4
BU	168	176	4,8	353	322	-8,8	542	565	4,2	1.111	1.116	0,5
RO	71	80	13,0	1.380	1.100	-20,3	1.546	1.615	4,5	3.099	2.917	-5,9
HR	101	113	11,9	269	265	-1,5	291	293	0,7	676	687	1,6
EUR 28 *	48.169	47.571	-1,2	51.693	51.998	0,6	55.731	56.074	0,6	165.209	164.957	-0,2

* Without Luxemburg, Greece and Malta/Senza Lussemburgo, Ellas e Malta
**Change in national collection of statistics based on new available guidance and the fact that no feed for pigs is produced by commercial feed mills. The previous quantity estimate in the past was transferred to cattle feed.
*** including milk replacers and feed for other animal species (goats, sheep, fish, games, rabbits, horses)

Table 2: EU compound feed production (million t)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total	149,6	149,2	151,4	151,8	153,4	155,3	157,7	161,2	165,2	165,0
Cattle	39,6	39,8	41,5	42,4	42,7	42,4	43,2	45,2	48,2	47,6
Pigs	50,2	50,4	49,8	49,2	49,9	50,6	50,6	51,4	51,7	52,0
Poultry	50,9	50,6	51,4	51,4	52,0	53,0	54,9	55,1	55,7	56,1

Table 3: Turnover of EU compound feed industry (million euros)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Turnover	40.718	49.321	41.130	43.372	49.470	53.460	50.395	49165	49.328	47.875	49.331	52.228

Table 4: Raw materials consumption by the EU compound feed industry (1 000 t)

EU	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Feed cereals	71.259	72.194	73.368	73.914	73.666	74.883	78.595	79.718	81.556	82.397
Tapioca	0	0	0	22	2	5	0	0	0	0
Co-products from Food & Bioethanol Industries	17.758	17.352	17.108	17.665	17.928	17.218	17.219	19.215	19.990	19.708
Oils & Fats	2.669	2.655	2.568	2.579	2.852	2.969	2.712	2.777	2.858	2.770
Cakes & Meals	41.416	40.759	41.590	41.307	42.487	42.699	41.798	41.457	42.094	41.152
Pulses	2.012	1.905	1.759	2.071	1.915	1.980	2.262	2.308	2.436	2.243
Animal meals	468	473	459	455	441	652	658	680	711	799
Dairy products	1.154	1.249	1.248	1.229	1.237	1.129	884	882	885	891
Dried forage	2.300	2.081	2.075	2.055	2.315	2.108	2.148	2.136	2.166	2.256
Minerals, Additives & Vitamins	4.433	4.351	4.408	4.326	4.696	4.913	5.222	5.413	5.479	5.455
All others	6.094	6.184	6.781	6.127	5.833	6.150	6.197	6.620	6.543	6.686

Table 5: Use of responsible soy (t)

Year	2015	2016	2017	2018	2019
EU-28	5.340.352	6.117.482	6.434.275	11.226.698	10.628.774
Europe	5.240.352	6.229.683	6.195.454	11.948.578	11.052.449

EXPLANATORY NOTES

Where necessary, figures relating to previous years have been corrected according to the latest available statistical information. Data on petfood production are no longer included in our statistics and data on previous years have been corrected accordingly.

Graphs are based on information and data received from the Member Associations, FEFAC contact points in EFTA and candidate countries, and FEFAC own calculations. The others have been extracted from EUROSTAT database and data released by DG Agriculture, AVEC, Alltech, Feed International and Toepfer.

As far as Luxembourg, Greece and Malta are concerned, no data are available. Therefore, tables in compound feed production section do not take account of the production figures of these countries. Total industrial production estimates: Luxembourg: 48,000 t, Greece: 3,000,000 t.

Data per the EU: EU-15 from 1994, EU-25 from 2004, EU-27 from 2007, EU-28 from 2013; excl. EL,LU and MT)

FEFAC MEMBERS

Active members

Organisation	Country	Member since
VFÖ	Austria	1995 (1964)
BFA	Belgium	1959
BFMA	Bulgaria	2013
CAFM	Cyprus	2004 (2003)
SKK	Czech Republic	2004 (2000)
DAKOFO	Denmark	1973
FFDIF	Finland	1995 (1993)
EUROFAC*	France	1959
DVT	Germany	1959
HGFA	Hungary	2012
IGFA	Ireland	1973
ASSALZOO	Italy	1959
LGPA	Lithuania	2005
NEVEDI	The Netherlands	1959
IZP	Poland	2004 (2001)
IACA	Portugal	1986 (1976)
ANFNC	Romania	2014
AFPWTC	Slovakia	2004 (2003)
GZS	Slovenia	2004
CESFAC	Spain	1986
FS	Sweden	1995
AIC	United Kingdom	1973

*EUROFAC took over from SNIA in 2016
Dates in brackets indicate 'Observer from'

Information correct as of 1 January 2021

Observer members

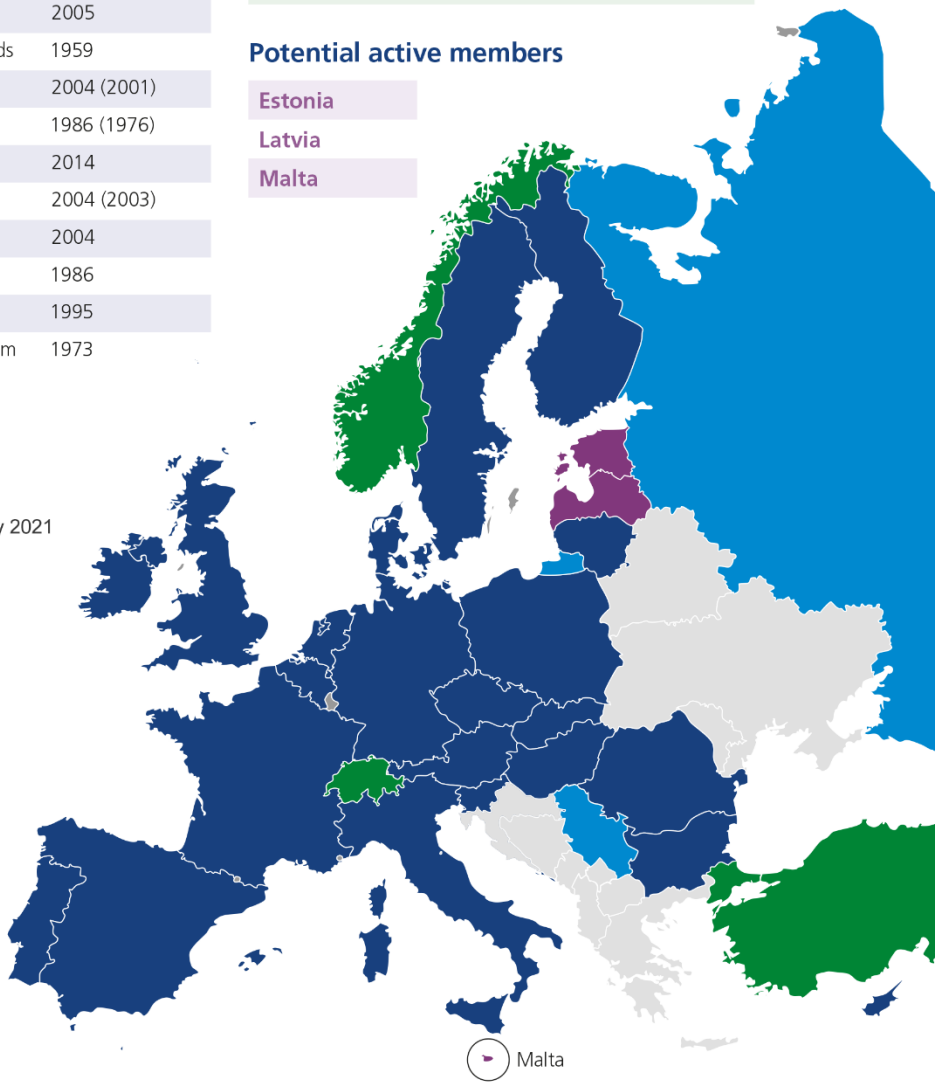
Organisation	Country	Member since
RUFM	Russia	2010
SFMA	Serbia	2009

Associate members

Organisation	Country	Member since
EFFPA		2014
EMFEMA		2003
NSF	Norway	2003
FKF AS	Norway	2014
Norkorn	Norway	2014
VSF	Switzerland	1966
TURKIYEM	Turkey	2014 (2005)

Potential active members

Estonia
Latvia
Malta



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