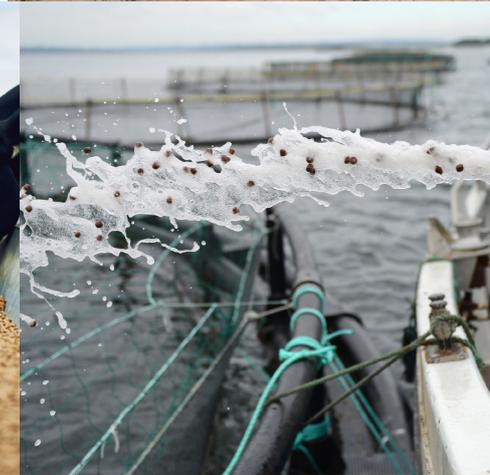




**FEFAC**  
Experts in Animal Nutrition

# FOR A **PROSPEROUS** AND **COMPETITIVE** EUROPEAN FEED AND LIVESTOCK AND AQUACULTURE SECTORS

12 FEFAC  
Recommendations  
for the  
EU Strategic Agenda  
2024 - 2029



# Foreword

Growing geopolitical tensions create huge pressure on EU feed and food supply chains in the context of ongoing climate change pressure on agricultural production. This combined pressure requires a deep review and rethinking of the EU's policy frameworks which needs to address the systemic nature of Biomass production and Biorefining activities (incl feed, food, bioenergy and other non-food uses) in Europe in order to meet growing societal expectations for increasing sustainable feed and food production and renewable energies derived from the same Biomass and land use. In the wake of EU elections, FEFAC members therefore reviewed its key sector recommendations to support the EU institutions reflection on how to strengthen the competitiveness, resilience and circularity of the European agricultural sector, including livestock farming in order to leverage significant investment to accelerate the green transition while fostering sustainable growth opportunities and helping to strengthen the EU's strategic autonomy.

As an innovative feed sector we see ourselves as the “Champion “ of circularity in the food chain. The Circular Feed concept can be closely linked to the valorisation of circular economy co-products emerging from the farming and other industrial sectors. This is an important illustration of the European feed industry's role as a key business driver for increased resource and nutrient efficiency, optimising the nutritional value of “lower value” biomass resources that emerge from the regional economy. FEFAC therefore recommends EU policy makers putting “circular feed” as a central sectoral indicator in the determination of progress towards “climate neutral” sustainable livestock and aquaculture production. This would allow the feed supply chain to act as a key enabler for the livestock and aquaculture economies reaching climate neutrality and to contribute to a more circular and resource-efficient EU bioeconomy.

**Pedro Cordero, FEFAC President**

## 12 FEFAC Recommendations for the EU Strategic Agenda 2024 - 2029

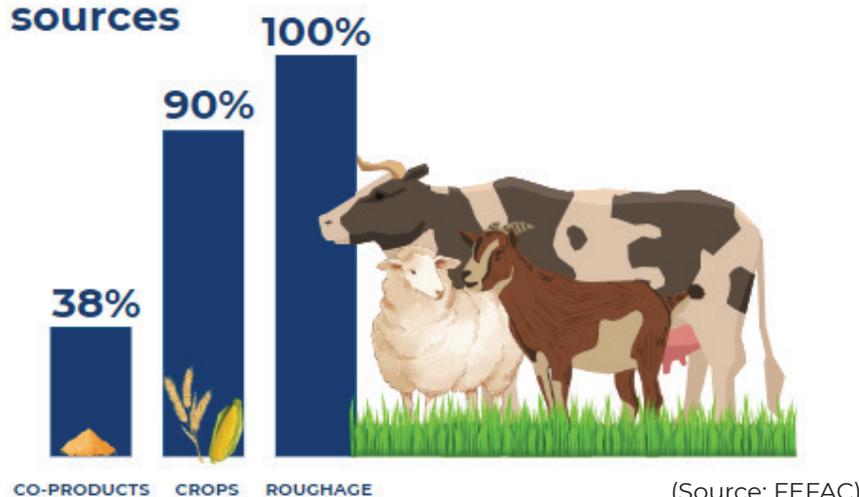
- > How to ensure our food security through a vibrant agriculture sector?
- > How to decrease strategic dependencies and increase resilience by developing a more circular and resource-efficient economy?
- > How to promote innovation and research, including in the field of defence and to accompany Europe towards climate neutrality?
- > How to diversify and secure our strategic supply chains?

# 1. How to ensure our food security through a vibrant agriculture sector?

## Recommendations

- > Ensuring **“long-term” food security**, which requires the EU’s focus on policy frameworks encouraging the production of **essential feed ingredients** to reduce current dependencies and increase the **EU's strategic feed autonomy**, especially for feed proteins.
- > Developing **national feed protein balance sheets at members state level** to analyse the strengths and weaknesses of homegrown feed protein production, identifying **opportunities for diversification of feed supply chains**, including specialty value chains like organic and aquaculture.
- > Prioritising **CAP measures towards bolstering the production of specific protein crops**, including soybeans, while designing eco-schemes supporting increased nutrient efficiency of sustainable feeding systems, which also **help reduce GHG emissions**.

### Share of EU origin in major feed protein sources



The EU should strive to improve its overall feed protein autonomy

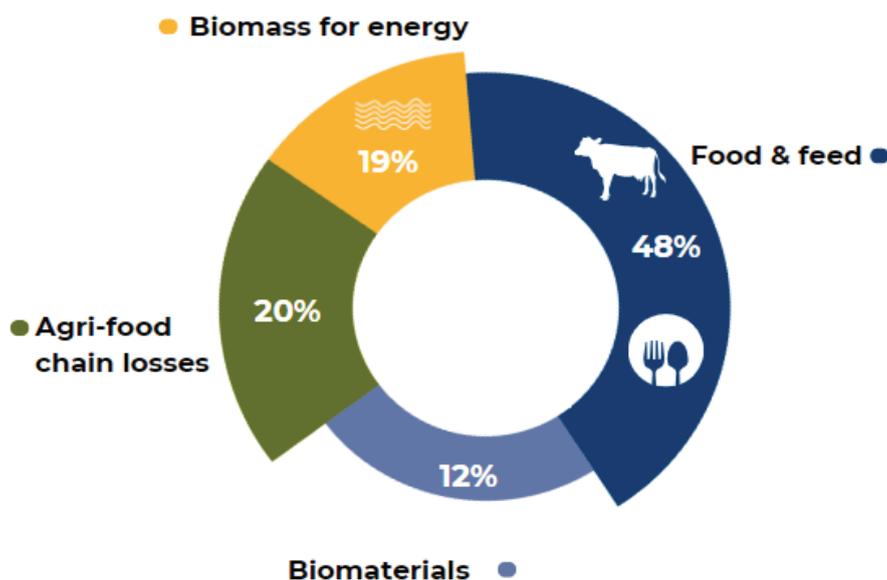


## 2. How to decrease strategic dependencies and increase resilience by developing a more circular and resource-efficient economy?

### Recommendations

- > Optimising biomass management through the development of an **EU biomass balance sheet**. Accurate data on biomass availability and utilization across key sectors (food, feed, renewable energy, and other non-food uses) are essential in supporting a coherent biomass policy, **minimising unsuitable resource competition, boosting technological innovation** and, in the end, generating added value and providing services along the whole biomass value chain.
- > Maintaining the access of the European compound feed sector to co-products from the bio-economy. It is of strategic importance **for the EU to preserve a level playing field across all bioeconomy** actors by upholding the principle that biogas expansion should not take place at the expense of biomass used for feed and food production.
- > Developing a holistic vision and roadmap on exploiting the unused potential of **new circular feed resources**, which are considered safe but currently constrained by legal restrictions, should be a cornerstone for the EU's efforts to further promote the use of circular feed in **"low- emission" livestock and aquaculture production systems**.

### Composition of the EU27 Biomass uses



(Source: JRC)

The EU should develop an accurate biomass balance sheet to enhance the efficiency of its circular bioeconomy

### 3. How to promote innovation and research, including in the field of defence and to accompany Europe towards climate neutrality?

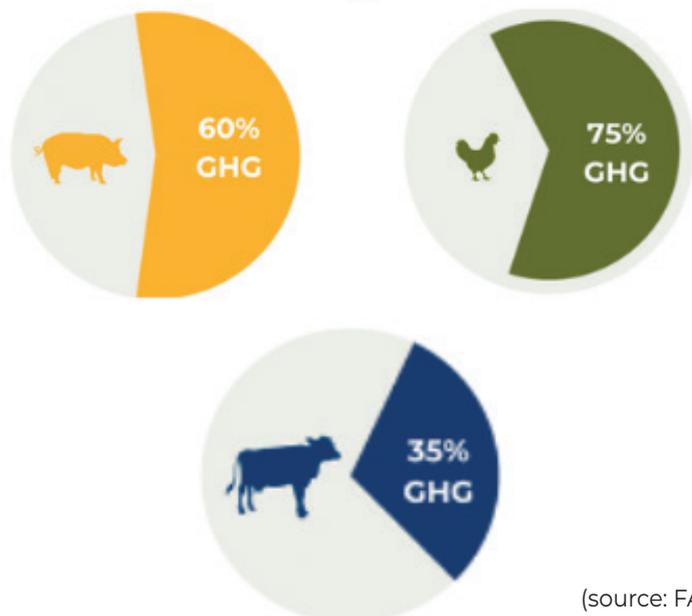
#### Recommendations

- > Reaching climate neutrality will remain a key challenge for the agriculture, livestock and aquaculture sectors, as GHG emissions are inherent in biological systems. However, innovation and research already provide practical solutions to inhibit methane emissions in cattle farming, while maintaining yields and product quality. In compound feed manufacturing, the more circular feed is used, the lower the carbon footprint. Innovation and research should foster safe nutrient recovery from resources currently unavailable for feed use, such as feed produced from insects and algae grown on waste-based substrates.
- > Promoting B2B communication on environmental performance of feed. Robust green feed labelling guidance has been developed by the feed sector in partnership with livestock farmers, based on the EU-endorsed B2B methodology PEFCR Feed for Food-Producing Animals (based on FAO-LEAP methodology). This guidance makes use of verified high quality Feed LCA datasets from the GFLI Database, covering all major feed ingredient sources used in the EU. The European feed industry is a global leader in measuring the environmental footprint of compound feed as well as in providing livestock farmers with solutions to reduce the environmental impact of feed digestion.

The EU should prioritise innovation in low-emission feed solutions



#### Feed share of total GHG emissions of animal products



(source: FAO)

## 4. How to diversify and secure our strategic supply chains?

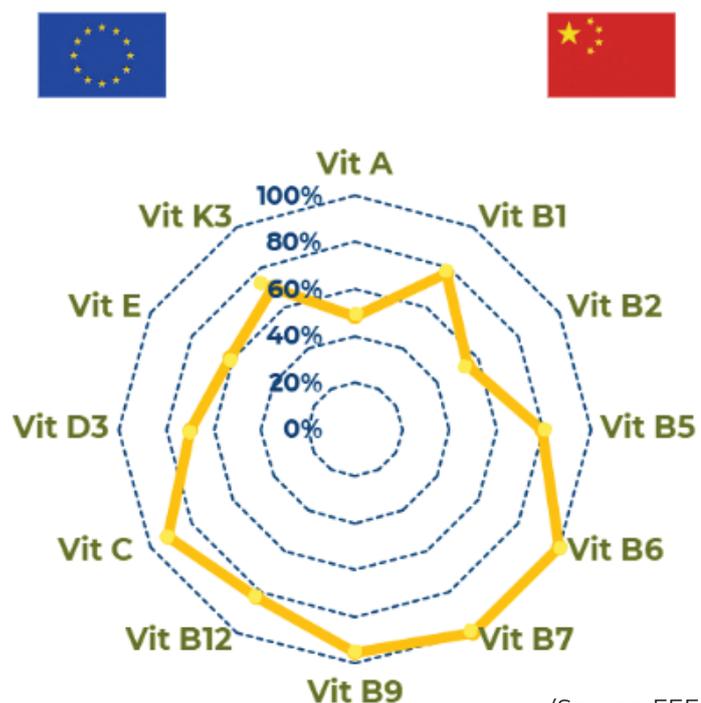
### Recommendations

- > Promoting investment in **essential feed additives manufacturing capacity** within Europe (vitamins, amino acids) by recognising their status as critical materials will enhance the **feed industry's resilience**.
- > Strengthening strategic and balanced trade partnerships as a prerequisite for the EU to safeguard market access to reliable and **sustainable feed ingredient supplies**. This requires establishing collaborative agreements and trade relationships with key feed ingredient suppliers to facilitate sustainable feed trade opportunities and practices.
- > Fostering mutually beneficial and balanced trade flows through existing **bilateral EU trade dialogues and partnerships and multilateral trade platforms (WTO)**
- > Targeting **EU research and development programmes on alternative feed materials**, including algae products, insects, single-cell proteins and fermentation biomass, provides a high return on investment, as they contribute significantly to reaching industrial scalability thresholds.

The EU needs to boost investment in home production of essential feed additives



### EU dependency on China



(Source: FEFAC)