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EU Compound Feed Production Market Forecast 2024

The forecast for EU compound feed production in 2024 offers a mixed outlook, reflecting diverse trends across livestock sectors influenced by economic, regulatory, environmental, and animal health factors.

Key drivers for the market in 2024 include economic uncertainty, regulatory changes, and ongoing environmental and animal disease impacts. These factors will continue to shape production dynamics across the EU, affecting different animal feed sectors in varied ways.

According to data from FEFAC, industrial compound feed production in the EU27 is projected to rise slightly by 0.50% in 2024 compared to 2023, reaching 147 million tons. Poultry feed production shows a moderate growth, with an expected increase of 1,3%. This recovery follows a challenging 2023, driven by a rebound in poultry production in key member states such as France, Spain, and Portugal, which began recovering from the impacts of Avian Influenza from last year. However, poultry production in Hungary and Italy continues to suffer from continued H5N1 avian influenza outbreaks.

The pig feed sector remains under pressure but is showing signs of stabilization compared to last year, in particular modest recovery is anticipated in Ireland (+3%), Spain (+5%), and Poland (+1.9%). However, key challenges persist due to an overall decline in pig populations in EU27 due to ongoing economic and animal disease-related pressures, in particular from African swine fever (ASF). In addition, Germany, Belgium, and the Netherlands face heightened policy pressure to reduce farm emissions or further downscale animal husbandry, creating significant uncertainty for the sector.

EU cattle feed production is expected to remain relatively steady, with minor fluctuations depending on regional conditions linked to the availability of roughages.

2024	Cattle	Pigs	Poultry	Total
Forecast (in mt.)	42,2	47,7	49,7	147,6
y/y change (%)	+0.30	0.00	+1.30	+0,50

Notes to the editor:

1. FEFAC, the European Compound Feed Manufacturers' Federation, represents 21 national associations in the EU Member States, as well as associate members in the UK, Norway, Switzerland, and Turkey.
2. The European compound feed industry employs over 100,000 people on the approx 3,200 production sites, often in rural areas, which offer few employment opportunities.
3. Farm & Pet animals in the EU27 consume an estimated 644 million tonnes of feed per year, of which about 23% are produced by compound feed manufacturers. The turnover of the European compound feed industry is estimated at €50 billion.
4. For more information, see our website (www.fefac.eu) or please contact Alexander Döring, Secretary General Tel. +32-2-285.00.50, Fax +32-2-230.57.22, e-mail: fefac@fefac.eu.
5. The forecast for 2024 is subject to change.