

Brussels, 26 May 2025

EU Compound Feed Production Market Forecast 2025

FEFAC market experts forecasts continued stability in the EU compound feed production market for 2025. The total industrial compound feed production in the EU27 is expected to reach 146.1 million tonnes, marking a slight decrease of - 0.34% compared to 2024. This marginal change reflects relative stability across most animal production sectors, despite increasing market uncertainty and varied national market trends. The EU compound feed sector remains resilient in the face of continuing economic, geopolitical, regulatory, environmental, and animal disease related challenges.

In 2025, EU cattle feed production is forecast at 41.285 million tonnes, a decrease of 1.4% compared to 2024. Among the major producing countries, Germany is expected to see a modest increase (+1.2%), while the Netherlands is projected to experience a significant decline of - 5.0%, mainly due to regulatory policies. Spain, the largest cattle feed producer, expects a decrease of - 3.6%. Poland, in contrast, is forecast to increase slightly by +3.9%. Most other Member States anticipate either stable or slightly reduced production levels, reflecting the overall downward trend in the sector due to environmental policies and animal diseases such as the recent outbreaks of highly infectious foot-and-mouth disease (FMD).

Pig feed production in the EU is expected to reach 46.960 million tonnes in 2025, a marginal decrease of - 0.8%. German production is down by - 3.0% while the Netherlands is forecast to see a sharp decline of -10%. Spain, the largest producer, is set for a 3.0% increase to 13.2 million tonnes. Portugal will rise by +4.3% and Poland is expected to grow by +2.7%. Ireland is projected to increase with +2.0%, while Hungary will likely see a decrease of -6.4% due to animal disease challenges in particular from African swine fever (ASF). The overall picture is one of stability, with some countries experiencing growth (Slovenia +0,6% and Bulgaria +9%) while others facing continued decline of production (Denmark -1,5%) due to structural changes and ongoing disease pressures.

The poultry feed sector is expected to grow further in 2025, with production forecast to increase by + 0.9% to 50.368 million tonnes. Spain and Portugal are set for a robust increase of +5.8% and +3.8% respectively. Poland, the largest poultry feed producer, is forecast to increase by + 2.3% to 7.44 million tonnes. Ireland and several other Member States (Austria, Slovenia) are expected to maintain stable production levels, with only minor variations.

2025	Cattle	Pigs	Poultry	Total
EU Forecast (in mt.)	41,2	46,9	50,3	146,1
y/y change (%)	-1.4	-0.8	+1.0	-0,3

Notes to the editor:

1. FEFAC, the European Compound Feed Manufacturers' Federation, represents 22 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 2025 is subject to change. Updated data will be collected in autumn 2025.