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SUSTAINABILITY



INNOVATION



FEED SAFETY



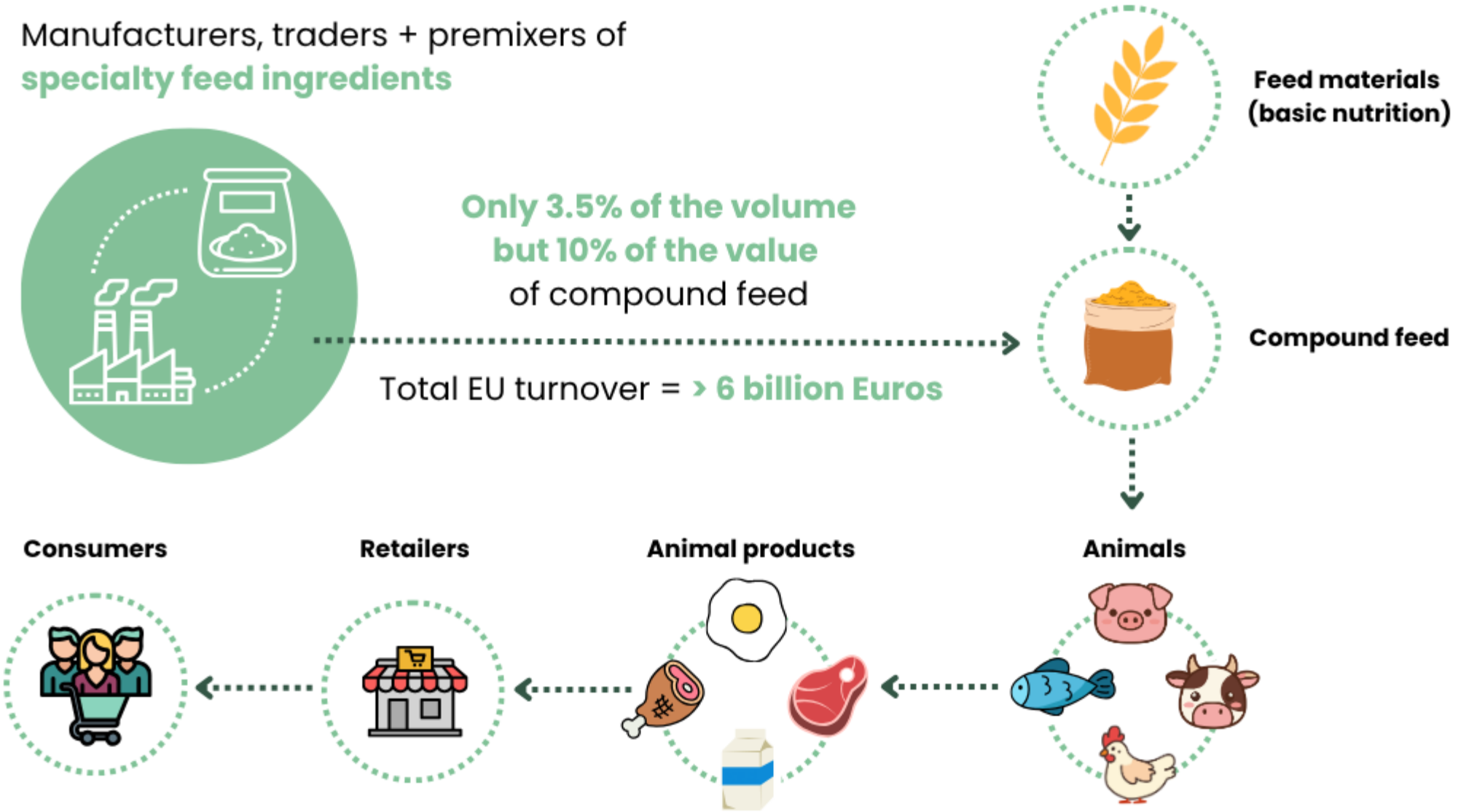
ANIMAL HEALTH AND WELLFARE



SAFE FOOD

ATF Seminar of 25 Nov 2026: Ensuring EU feed security and safety in a rapidly changing global environment (with inputs from FEFAC)

The Livestock Feed and Food Chain



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Who is FEFANA ?

The EU Association representing the industry of Specialty Feed Ingredients and their Mixtures founded in 1963

93 Member companies: producers, traders, premixers based in EU, EFTA, UK



Feed additives and other feed ingredients used for a specific function (other than basic nutrition)



Represent and promote common industry interests, engage with EU institutions and stakeholders for a fair and competitive market



Regulatory and enforcement activities promoting feed and food safety



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https://fefana.org/

Who is FEFAC

European Association of Compound Feed and Premix Manufacturers - ***founded in 1959***

22 National Associations as full members

8 associated members:

5 National Associations in non-EU European countries (UK, 2 Norway, Switzerland, Turkey)

3 EU Feed sector associations: EFFPA, EMFEMA, FAMI-QS

IFIF International Feed Industry Federation – Feed the world

gfli Global Metrics for Sustainable Feed

atf animal task force – A European Public-Private Partnership

EUROPEAN LIVESTOCK VOICE

IGTC International Grain Trade Coalition



100,000 direct employment

- 3.200 factories - rural areas



63 Bio € Turnover

- 2024 -

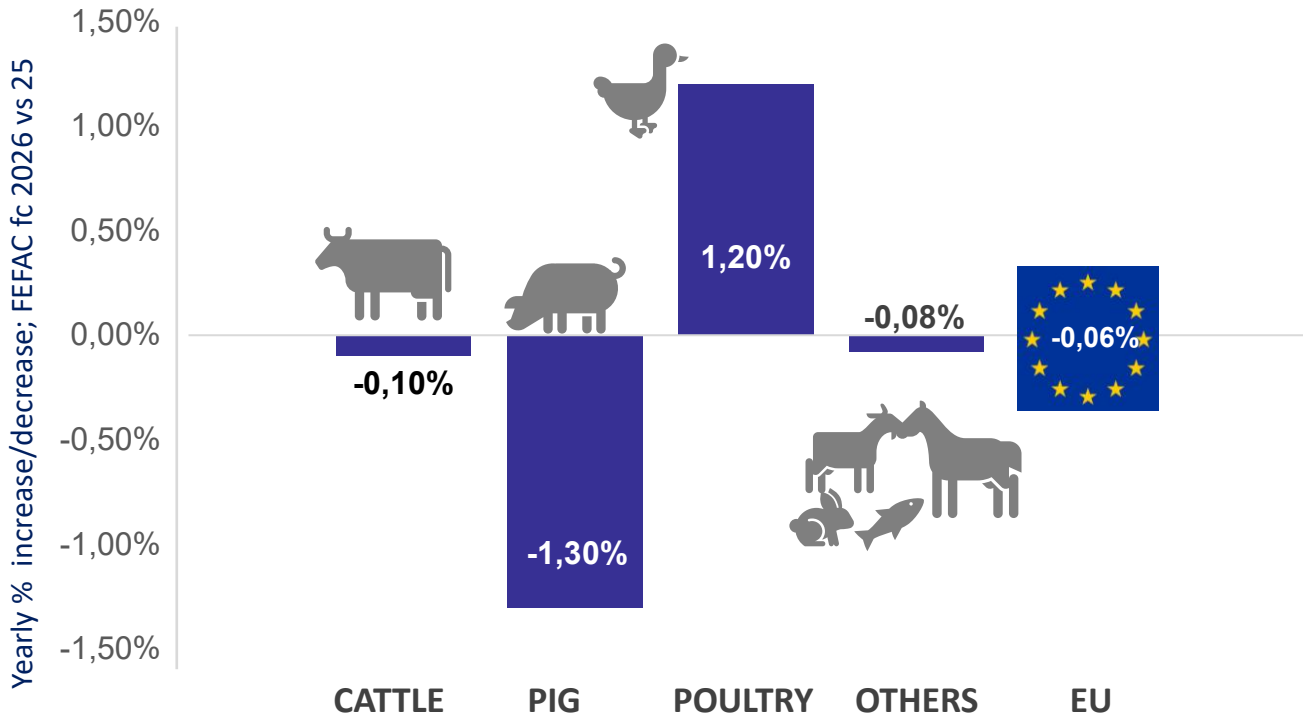


152 Million tons (fc 2026)

- 23% of total 640 Mio t feed use

FEFAC Experts in Animal Nutrition

The animal feed sector in the EU - fc 2026 -



	CATTLE	PIG	POULTRY	OTHERS	EU
% Feed / Category	29,8 %	31,9 %	33,9 %	4,3 %	
Volume / Category	45,3 mt	48,5 mt	51,6 mt	6,6 mt	152 mt

excl. Luxembourg, Greece and Malta

FEFAC Feed&food report 2025



Stable trend in the EU

Heterogeneous evolution by ***species***

Differences between ***countries***
- Portugal, Ireland, Austria, Spain production increase -

Market ***concentration***
- poultry only growth sector

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Challenges and Opportunities shaping EU Feed Security and Safety

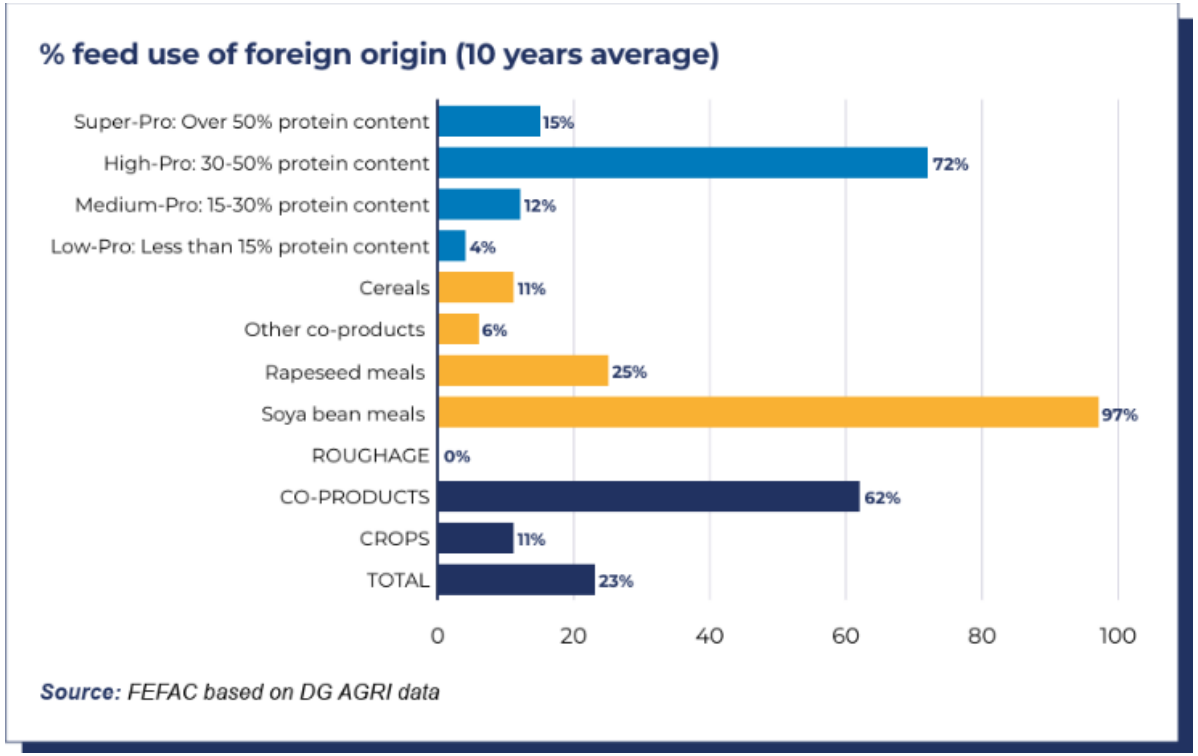
A more volatile operating environment

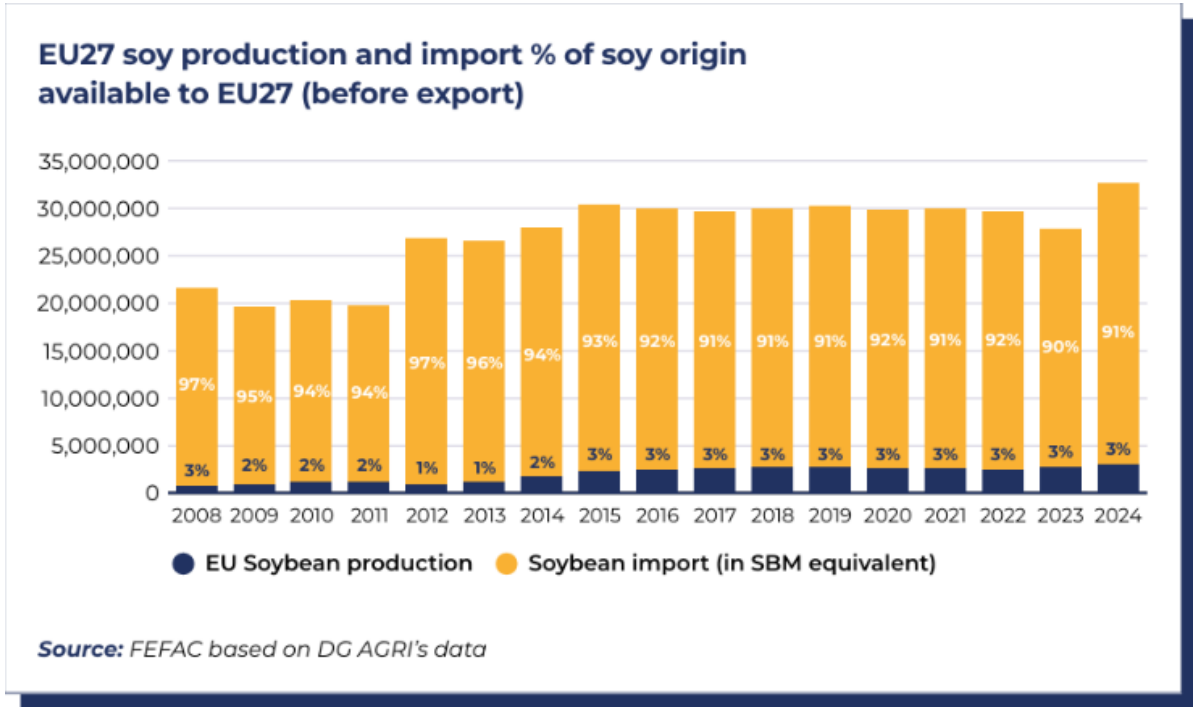
- Geopolitical instability is increasing uncertainty in energy, transport and agricultural commodity markets
- Armed conflicts and strategic rivalry are affecting trade corridors, insurance costs and shipping reliability
- Inflation, weaker growth and higher financing costs are putting pressure on EU feed manufacturers and livestock producers
- **EU import dependence for some feed materials and particular feed additives exposes the EU to external shocks** (ref. next two following slides)

Key takeaway: Volatility is no longer episodic; it has become structural

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EU Soy Import Dependency





Total EU Soy Usage: 33.6 Million Tonnes (2025)

Brazil	51.1%	17.0M t
Argentina	20.9%	7.0M t
USA	17.2%	5.7M t
Ukraine	8.1%	2.7M t
Canada	2.7%	0.9M t

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EU-27 Geopolitical Feed Supply Vulnerability

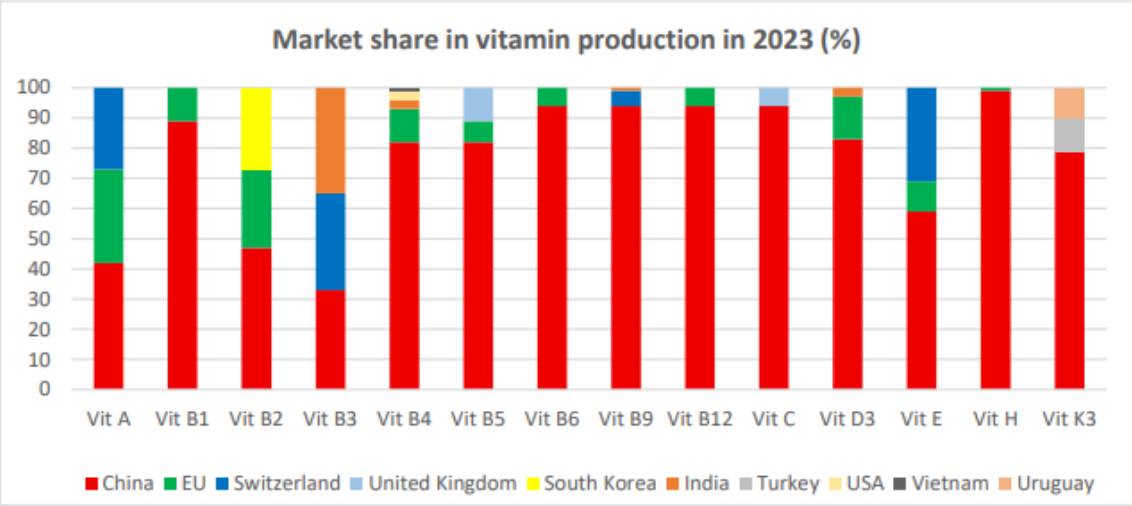
Vitamins

Supplementation of feed with sufficient quantities of vitamins is a prerequisite for animal health & welfare and performances whatever the animal farming system.

The EU-27 produces no Vitamin B9, C and K3

Global market concentration

China is the only country producing all vitamins with a global market share between 34 and 99%.



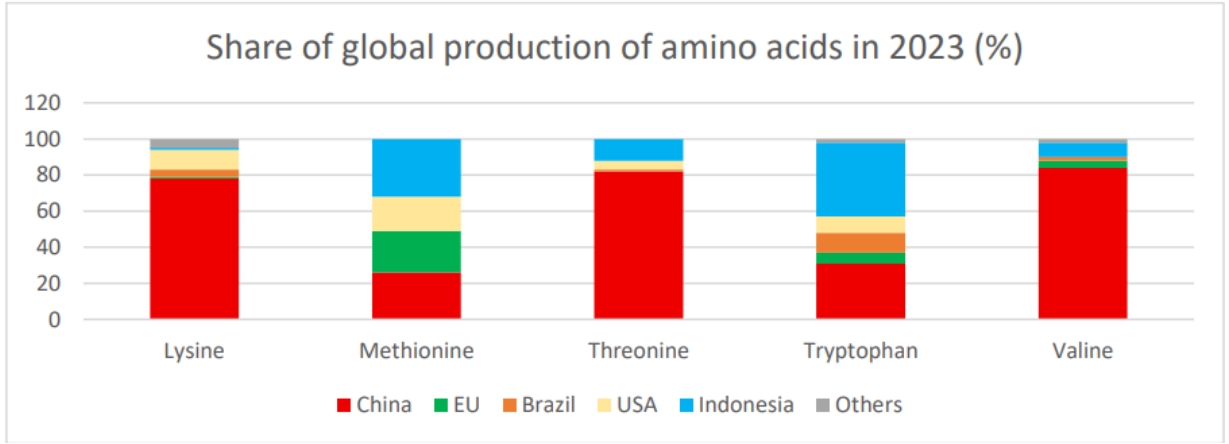
Amino Acids

Using amino acids in feed diets is the most cost-effective solution to reduce nitrogen emissions and EU dependency on third countries for soya, while contributing to maintain high level of animal health and welfare.

The EU-27 produces only 6% of its needs in Lysine and 0% of the Threonine.

Global market concentration

China is the only country producing the 5 most essential amino acids, with a global market share between 25 and 85%.



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EU-27 Geopolitical Feed Supply Vulnerability

Economic impact assessment of a scenario of "sudden" rupture of essential vitamin supplies from China to the EU released on 30 October 2026:

The total economic impact is estimated at 29 bio. €, affecting mostly the poultry and the pig sectors, which would suffer a substantial reduction of output of -35 and -20% respectively.

- The FEFAC disruption risk assessments is based on the expertise and advice of FEFAC members and provides a follow-up & complementary assessment to the initial FEFAC publications, i.e. the Evaluation of the EU vulnerability as regards the sourcing of vitamins and amino acids for feed use and the Recommendations on measures to tackle this vulnerability, released respectively in September 2025 and March 2026.
- This impact assessment does not take into account additional "knock-on" economic effects on the whole feed and livestock chain including, from the loss of competitiveness of the EU premixtures & compound feed industry on the global market upstream to the increase in consumer prices of animal products. It does not investigate either the specific adverse impact on animal welfare and health status of farm animals resulting from a significant deficit of essential vitamins in their diets.

=> Website link: FEFAC initial assessment of drought impact on EU feed supply chains and possible mitigation measures | FEFAC

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Climate, trade disruption and policy complexity are converging

- Climate change is intensifying droughts, floods and yield variability in key sourcing regions
- Logistics bottlenecks and trade disruptions can rapidly tighten availability of essential feed inputs from concentrated origins of proteins, additives and key raw materials
- Evolving EU regulatory frameworks are increasing compliance complexity and uncertainty for operators
- Sustainability expectations from policymakers, customers and financial actors continue to rise – also an opportunity for innovations in the feed chain

Key takeaway: The EU feed sector must manage risks related to security of supply and safety together and simultaneously across supply, compliance and reputation

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EU Feed Security and Safety: Building a Resilience Agenda

EU Vision for Agriculture and Food

Develop a prosperous, stronger, and more innovative ***agri-food system*** that benefits both ***farmers and consumers*** and contributes to ***feeding the world sustainably***

EU Livestock Strategy

- Enhance resilience, competitiveness and sustainability
- Continue the needs for further simplification of feed additives regulatory framework with help of the Food Implementation Dialogue
- Facilitating the use of animal by-products

EU Protein Action Plan

- Increase the share of protein from oilseeds and protein crops sourced in the EU from 25% to 35% by 2035
- Develop domestic production of feed inputs and additives
- Circularity as a driving principle

Key takeaway: Positive intentions, concrete action plan expected to unfold soon

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Strategic resilience as a core competitiveness issue

- Diversification of origins, suppliers and transport routes is essential
- Strategic autonomy should strengthen EU capacity without closing off international sourcing options
- Risk monitoring, contingency planning and crisis coordination need to be upgraded across the chain
- More resilient systems can improve both business continuity and regulatory confidence

Key takeaway: Resilience is not redundancy for its own sake; it is disciplined preparedness

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Innovation and supply-chain collaboration are central

- Innovation in ingredients, formulation and process technology to reduce dependence on constrained inputs

- Public-private cooperation to accelerate uptake of science-based solutions, closer collaboration between industry and academia is of key importance

- Policy frameworks to reward practical innovation rather than delay it through unnecessary complexity

Key takeaway: Europe needs more innovation-friendly policies and regulations and closer intra and extra feed chain cooperation

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Erosion of EU manufacturing capacity

Protect existing production now, while rebuilding a competitive European base for indispensable specialty feed ingredients.

What is eroding capacity?

High input costs
Energy and material cost disparities weaken EU production economics.

Regulatory friction
Complex requirements raise compliance costs and slow innovation.

Investment deterrence
Unpredictable outcomes and weak returns discourage new EU facilities.

Import dependency
Closures deepen reliance on third-country supply.

Solutions for a resilient EU base

Stabilise existing plants
Target investment incentives, innovation support and energy-cost relief.

Make investment viable
Deliver predictable regulation, affordable low-carbon energy and access to capital.

Build supply resilience
Diversify sourcing, strengthen trade links and prepare emergency "Green Lanes".

Simplify without lowering safety
Cut bureaucracy and accelerate approval of new technologies.

KEY TAKEAWAY: Europe must act on both sides of the equation: preserve today's manufacturing capacity and create the conditions for competitive reinvestment tomorrow.

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Circularity in Animal Nutrition



Catalogue of measures for the circularity of feed



Report on the circularity of animal feed

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Promote the use of co-products in animal feed
- improving costs and versatility-

Reducing ***food waste*** and preventing ***nutrient loss***

Reducing the animal ***product's footprint*** by reducing dependence on imports of certain raw materials (LUC)

Legislative framework that removes restrictions on the use of co-products

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Feed safety systems must stay robust under stress

- Risk assessment should be science-based, proportionate and agile enough to respond to emerging threats
- Early-warning systems, data exchange and coordinated incident response should be strengthened
- Regulatory implementation should avoid unnecessary delays in access to safe and effective solutions
- Safety policy should recognize the value of innovation in prevention, control and substitution

Key takeaway: A resilient feed sector requires modernized and responsive safety governance

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Specialty feed ingredients deliver practical system value

- Additives and functional ingredients support feed hygiene, stability and quality preservation
- Precision nutrition can improve feed conversion and optimize use of scarce raw materials
- Technological solutions can support more consistent production performance across variable input conditions
- Premixes and specialty solutions help translate nutritional science into scalable practice

Key takeaway: Innovation in feed technology helps do more with less, more safely

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Feed innovation drives animal health and sustainability

Healthier, more resilient animals use resources more efficiently

Feed innovation connects three mutually reinforcing outcomes:

Animal health & resilience

- Supports gut health, resilience and robust production
- Complements farm-management and veterinary strategies

Efficiency & circularity

- Reduces losses and improves animal performance
- Enables precision feeding and alternative feed resources

Lower environmental pressure

- Improves nutrient use and lowers resource use per unit of output
- Uses new ingredients & process technologies to reduce emissions

KEY TAKEAWAY: Feed innovation links animal health, resource efficiency and environmental performance, supporting circularity and competitiveness.

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Conclusion – summary of recommendations from the EU feed chain to EU policy makers

Call of the EU feed sector to EU policy makers

Enable competitiveness and innovation

- Establish a coherent, science-based regulatory framework that supports investment, innovation and growth.

Strengthen resilience and strategic autonomy

- Secure open trade, diversified sourcing and access to competitive energy and critical raw materials.
- Safeguard EU production capacity and support investment through targeted financial instruments.

Support sustainable feed systems

- Advance the EU protein strategy, circular economy solutions and alternative feed resources with clear and proportionate safety rules.

Improve preparedness and policy coherence

- Strengthen crisis readiness, cumulative impact assessment and cross-sector coordination.

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A resilient EU feed sector is indispensable for food security, livestock sustainability and strategic autonomy!

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THANK YOU !