

FEED & FOOD 2024



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 22 national Associations in 22 EU Member States as well as Associations in Switzerland, Turkey, and Norway with observer/associate member status. FEFAC is the only independent spokesman of the European Compound Feed and Premix Industry at the level of the European Institutions. FEFAC is a member of IFIF and holds observer status in CODEX Alimentarius.

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EXPLANATORY NOTES

Where necessary, figures relating to previous years have been corrected according to the latest available statistical information. Since 2015, data on pet food 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 EU candidate countries, and FEFAC's own calculations based on industry expert advice. The others have been extracted from the EUROSTAT database and public data released by DG AGRI and Alltech.

As far as Luxembourg, Greece and Malta are concerned, no data on industrial compound feed production, feed materials consumption and turnover are available. Therefore, FEFAC tables and graphs do not take into account the figures of these countries. Nevertheless, total industrial feed production for these countries is estimated by other sources: Luxembourg: 90,000 t, Malta 80,000 t, Greece: 4,000,000 t.

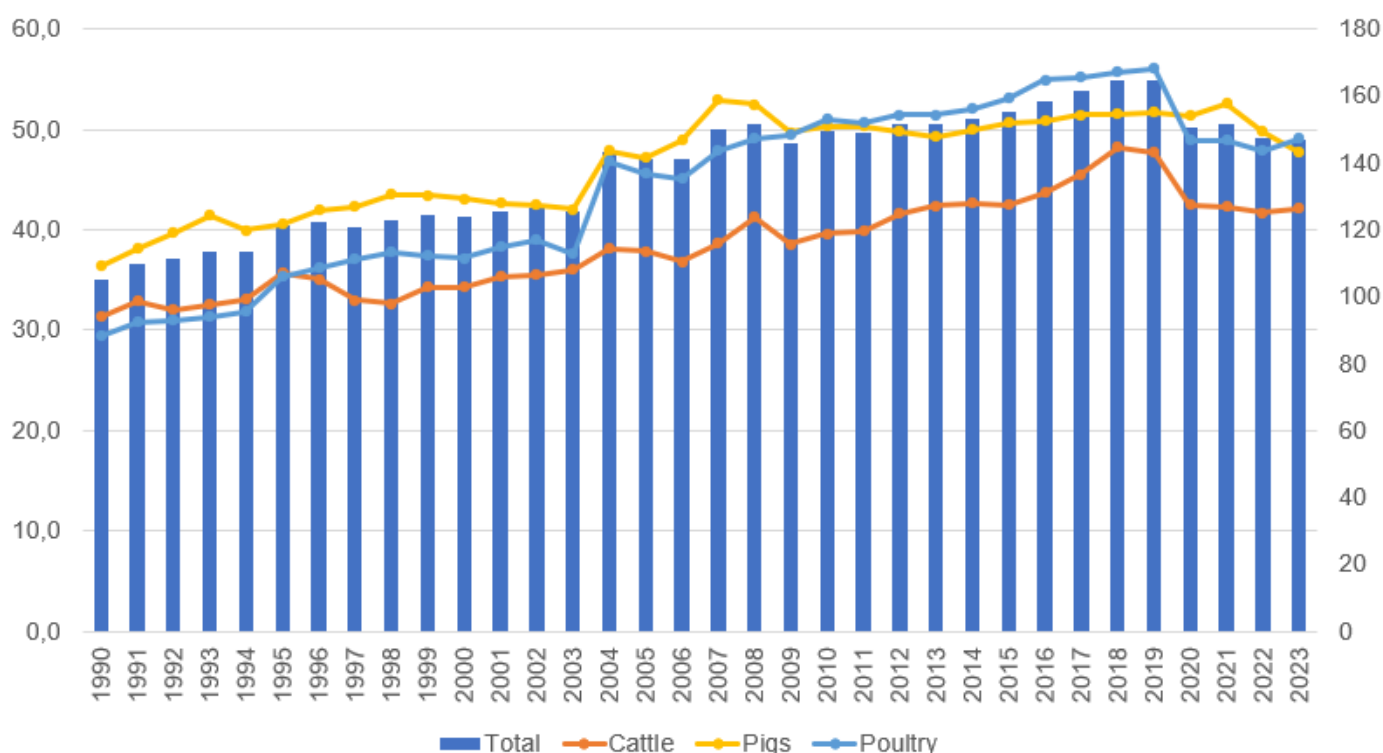
FEFAC: data per the EU as EU-15 from 1994, EU-25 from 2004, EU-27 from 2007, EU-28 from 2013, EU-27 from 2020, excl. EL, LU, MT and in Million tons (MT).

INTRODUCTION

This publication aims to offer a wide-ranging overview of the economic development within the European feed sector. It focuses on the feed industry's role as a vital part of the EU feed and food supply chain and its contribution to the European livestock and aquaculture economies.

The industrial compound feed industry is a dynamic sector with slow but steady growth over the past two decades. This growth reflects market preferences of livestock and aquaculture farmers on efficient compound feed to meet increasingly stringent performance and quality standards. While the decline recorded in 2020 can be primarily attributed to the UK's withdrawal from EU production totals, subsequent decreases in production reflect broader global disruptions. Factors such as the COVID-19 pandemic, geopolitical tensions, notably the conflict in Ukraine, and member states environmental policies, have reverberated throughout the EU livestock sector. These challenges have cast a shadow over the EU feed industry, contributing to a recent decline in production.

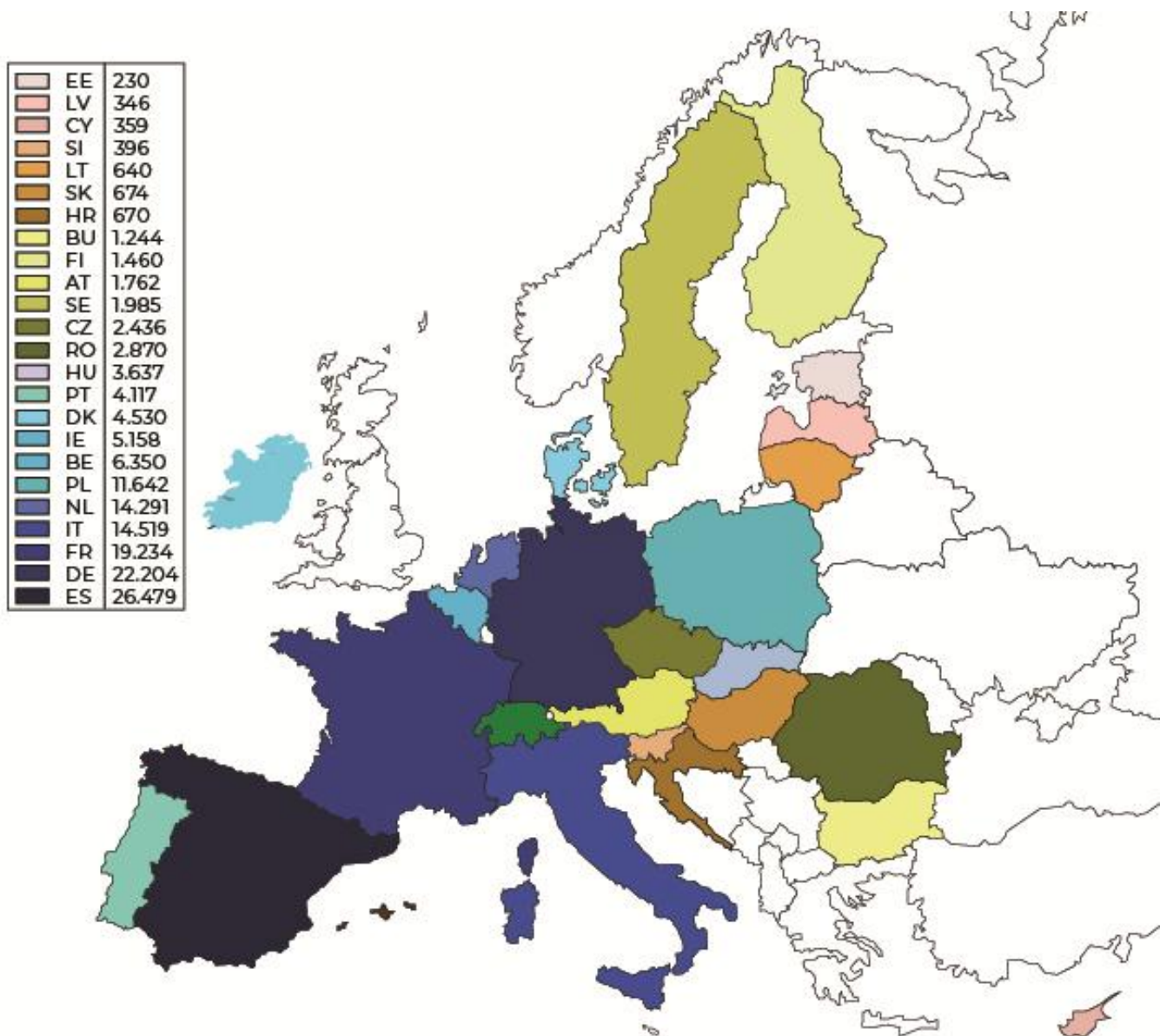
Evolution of compound feed production in the EU (mt.)



Source: FEFAC

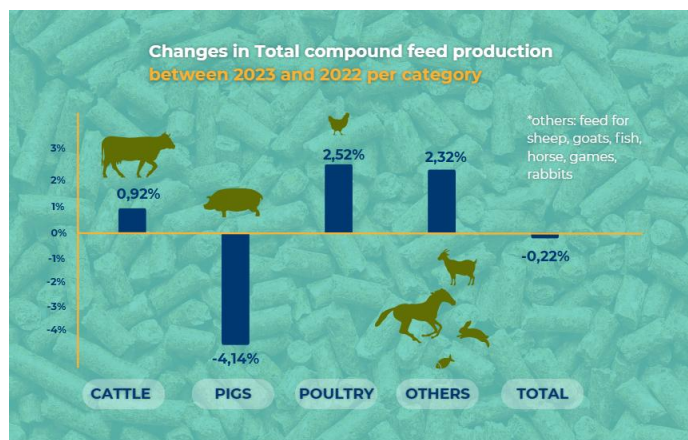
FEED

EU COMPOUND FEED INDUSTRY PRODUCTION 2023 (1000 t)



Source: FEFAC

In 2023, compound feed production in the EU reached 146.9 million tons, marking a marginal decrease of -0.22% compared to 2022, as reported by FEFAC members. This decline was observed across the pig sector, experiencing a notable decrease of -4.1%, mainly caused by African Swine Fever (ASF). The poultry sector increased by 2.5% despite the prevalence of animal diseases such as Avian Influenza (AI).



Source: FEFAC

The EU economy faced significant challenges due to the Russian invasion of Ukraine and the ensuing energy crisis, resulting in heightened inflation and decreased demand for animal products. Consequently, this downturn in demand had a direct impact on feed production. However, certain countries including France (FR), Spain (ES), Portugal (PT), Slovenia (SI), and Bulgaria (BU) managed to either stabilise or increase their feed production levels, though modestly, with Spain showing the most significant increase. Moreover, environmental and animal welfare policies, particularly in Belgium (BE), Germany (DE), and the Netherlands (NL), continued to exert pressure on reducing livestock populations. This emphasis on sustainability and animal welfare further influenced feed production dynamics in these member states.

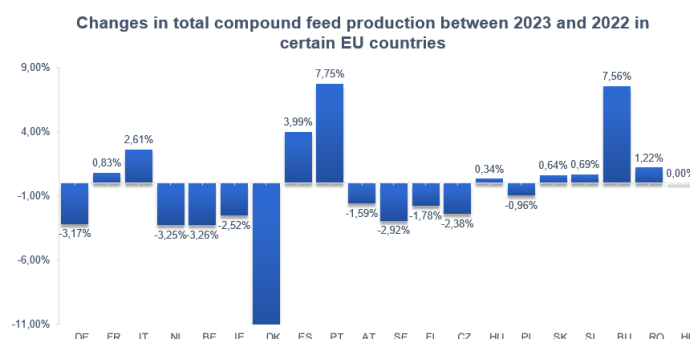
In 2023, poultry feed production increased by 1.4 million tons due to several factors. Countries heavily impacted by Avian Influenza (AI), such as Poland (PL) and Slovakia (SK) reduced their

poultry production. However, countries such as Italy (IT), Portugal (PT) and Spain (ES) had a notable increase in production.

The pig feed sector faced a notable decline, witnessing a production drop of nearly 2 million tons compared to 2022. Several Member States, including, Netherlands, Belgium, Germany, Denmark, France, Austria, Finland, Sweden, Ireland and Romania, experienced production decreases exceeding 5%. The economic downturn and diminishing profitability led to the closure of numerous small farms in certain regions. Pig meat exporting countries reduced their production as China continues to recover from ASF and no longer imports pork volumes at previous levels. African swine fever continued to play a role in certain countries, such as Germany and Poland impacting the economic efficiency of pig farms.

The production of cattle feed slightly increased by 0.9 million tons compared to the previous year. This increase can be attributed to the stabilization of production levels compared to 2022.

Spain was the best-performing country, with an annual growth of +4.0% for the total compound feed production, boosted by the demand for poultry and cattle compound feed. Conversely, several other major compound feed-producing countries, including Germany (-3.2%), the Netherlands (-3.2%), and Denmark (-12.2%), experienced declines in their total feed production volumes, reflecting various economic and market factors.

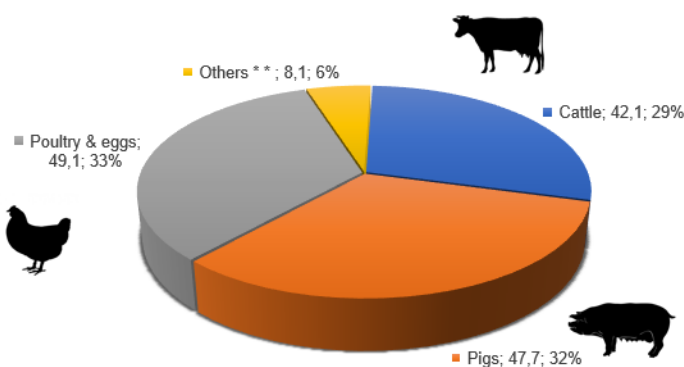


Source: FEFAC

Spain, Germany, and France continue to hold the top positions in compound feed production within the EU. Spain leads in both cattle and pig feed production, with 9.6 million tons and 12.9 million tons respectively, while France maintains its dominance in poultry feed production with 7.7 million tons

Overall, and contrary to 2022, the poultry feed sector now stands out as the largest segment of industrial compound feed production in the EU-27, accounting for 49 million tons, followed closely by the pig feed at 47.7 million tons and cattle feed at 42 million tons.

Industrial compound feed production in EU* per category in 2023, 146.9 mt.



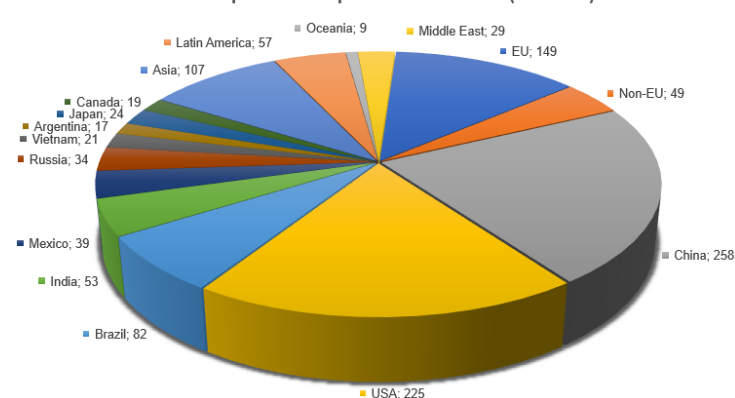
Source: FEFAC

The compound feed industry has skilled a significant shift towards capital intensiveness in recent years, driven by an increasing reliance on technological advancements to improve efficiency and sustainability. Using advanced methods, feed formulations are tailored to meet the specific needs of livestock farmers, with a

certain focus on improving environmental performance. These methods encompass stringent control measures over feed material selection, manufacturing processes, and the quality of final products. Operating within a comprehensive regulatory framework, both at the EU and national levels, the industry adheres to stringent legislation aimed at safeguarding the high quality and safety of feeds for livestock and consumers of animal products.

The EU-27's compound feed production accounts for 13% of the global total industrial feed production, estimated at around 1,400 million tons

Global compound feed production in 2023 (1172 mt.)

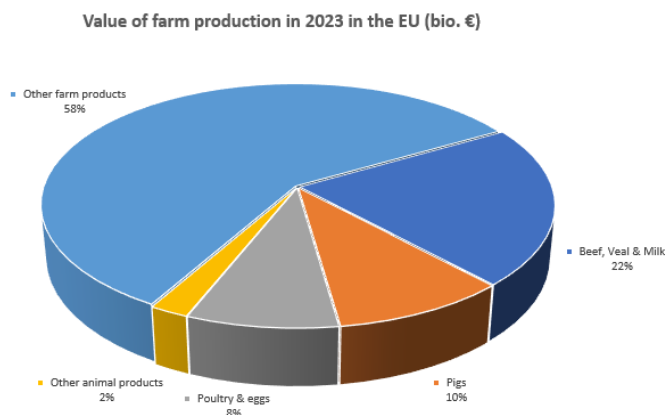


Source: FEFAC based on Alltech

The EU's global market share has experienced a 12% decline over the past 6 years, primarily attributed to the notable surge in feed production experienced in Asia-Pacific and North America during the same period.

FEEDING EU LIVESTOCK

The livestock sector, valued at €213 billion, accounts for 42% of the total farm production value in the EU-27. Dairy, beef, and veal together account for more than half of the total value of €110 billion, among livestock products. Following closely are pigs at €50 billion, poultry and eggs at €43 billion, with other animal products, including sheep and goats, contributing €11 billion. In total, the agricultural output of the EU-27 reached €514 billion in 2023.



Source: FEFAC based on Eurostat

Over the past 25 years, the feed's cost has steadily outpaced increases in producer prices, highlighting a sustained challenge for livestock farmers to increase productivity. This trend underlines the imperative for compound feed producers to incessantly improve their operations to deliver cost-effective solutions.

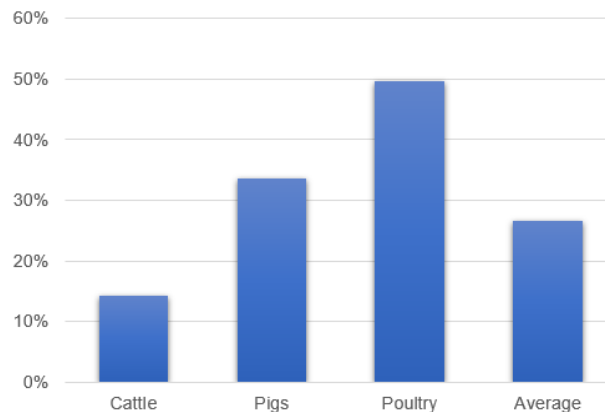
Comparison between producer prices for animal products and feedingstuff prices (Nominal Index 2000=100)



Source: FEFAC based on Eurostat

Animal feed stands out as the single most significant cost factor in livestock production. In 2023 up to 50% of the farm gate value of poultry, 55% of the farm gate value of pigs and 17% of the farm gate value of cattle.

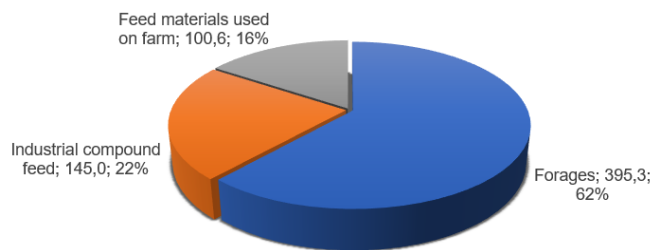
Value of purchased compound feed in total animal output value in 2023



Source: FEFAC based on Eurostat

The yearly feed consumption of farm animals in the European Union amounts to about 640 million tons, comprising both feed materials. Among these, 395 million tons are roughages sourced directly from farms. The remaining amount of 250 million tons of feedstuffs consumed, includes cereals cultivated and utilized on the farm of origin, as well as feed purchased by livestock producers to supplement their resources, encompassing both feed materials and compound feeds. It's estimated that around 100 million tons of feed materials are utilized directly on the farm. Additionally, in 2022/23, 145 million tons of compound feed were produced, constituting 22% of the total feed basket.

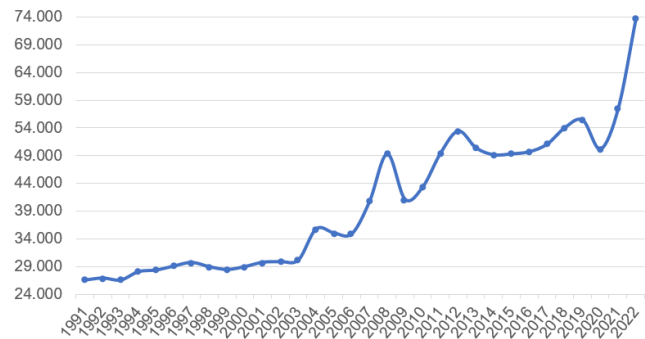
Livestock sourcing in feed in the EU27 (640 mt. in 2022/23)



Source: FEFAC based on Eurostat

Turnover of the EU-27 industrial compound feed industry was 73 billion euros in 2023.

Turnover of the EU Compound feed industry (million euros)



Source: FEFAC

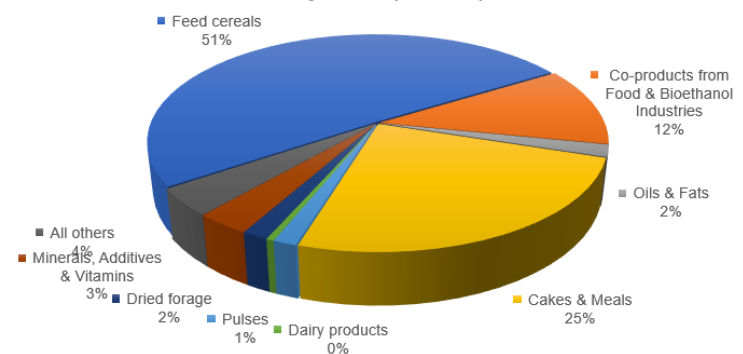
CONSUMPTION OF FEED MATERIALS

The role and expertise of feed formulators are vital in producing feeds that meet the nutritional necessities of animals to support optimal performance. This involves selecting a extensive range of feed materials and feed additives in the most efficient manner to manufacture compound feeds. Apart from considering cost, the availability of feed materials is a key consideration in the production process. While cereals, pulses, and co-products from the food and bioethanol industries form the primary sources of feed materials within the EU, certain materials, particularly protein-rich ones like soybean meal, are mainly imported from Third Countries due to insufficient domestic production. The diversity of feed material sources plays a pivotal role in the industry's capacity to produce high-quality feeds at competitive prices for livestock farmers.

In 2023, the compound feed industry of the EU-27 collectively produced 145 million tons of feed. This contained 74.6 million tons of feed cereals, 36.5 million tons of cakes and meals, 17.5 million tons of co-products from the food and bioethanol industries, 4.8 million tons of minerals, additives, and vitamins, 2.7 million

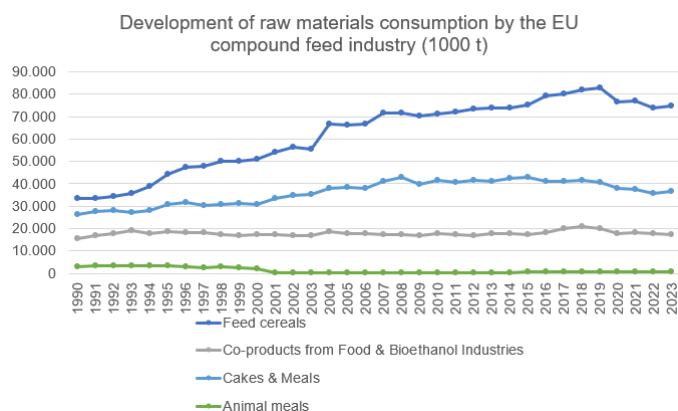
tons of oils and fats, 2.3 million tons of dried forage, 2.1 million tons of pulses, and 6 million tons of various other feed materials such as former foodstuffs, straw, microbial biomass, among others.

EU-27 Feed material consumption by the compound feed industry in 2023 (147.2 mt.)



Source: FEFAC

Over the last 10 years, the proportion of feed cereals (50.7%) and co-products of the food and bioethanol industry (12%) remained stable. On the contrary, a decreasing trend can be recorded in the consumption of oilseed meals due in particular to a trend to further reduce the levels of crude proteins in feed for farmed animals and animal meals.



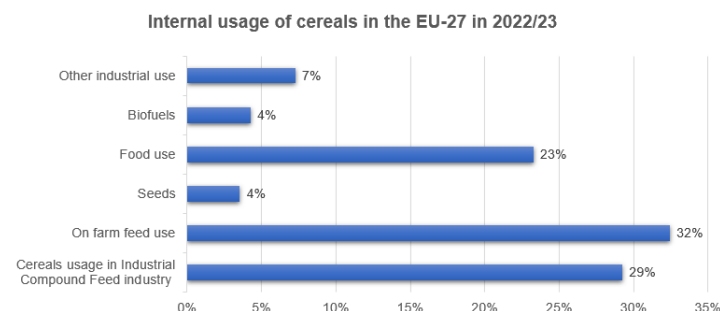
Source: FEFAC

The usage of processed animal proteins (PAPs) in compound feed went down by 70% in the past 20 years following the BSE crisis and the ban of its feed use for most species in the EU in 2001. Even though non-ruminant PAPs (2013) and insect meal might be used lawfully in aquafeeds as of 2013 & 2017, respectively, the declining trend has not been reversed since then. Non-ruminant PAPs are an example of a local feed source that could help the EU become more protein self-sufficient, thus reducing reliance on protein-rich feed imports. The EU's decision to re-authorize the use of porcine PAP in poultry feed, avian PAP in pig feed, and insect PAP in both pig and poultry feed in August 2021 marked a significant step in this direction. However, it is anticipated that there will be limited mainstream adoption in the compound feed sector, even with this regulatory shift. This limitation stems from stringent technical criteria, which restrict the use of PAPs in specialized "single species" feed mills. As of 2022, reports indicate that only a very limited number of compound feed manufacturers in the Netherlands that have begun incorporating these feed materials into their operations within dedicated facilities. Additionally, there are indications that further authorizations for the use of avian and porcine PAPs may be granted to compound feed plants in Belgium in the near future. While there is moderate interest in these feed materials in Germany, broader uptake within the industry is yet to materialize.

Product of animal origin	Feed for food producing animals					feed for pets and fur animals
	Ruminant	Pig	Poultry	Fish	Other	
Ruminant PAP, including ruminant blood meal						
Blood products from ruminants						
Hydrolysed proteins from ruminants tissues other than hides and skins						
Non-ruminant PAP, including non-ruminant blood meal but excluding fishmeal, porcine PAP and poultry PAP						
Porcine PAP						
Poultry PAP		2021	2021	2013		
Insect PAP		2021	2021	2017		
Gelatine and collagen from ruminants		2021	2021	2021	2021	
Fishmeal						
Blood products from non-ruminants						
Di and tricalcium other than those mentioned elsewhere in the table						
Hydrolysed proteins from non-ruminants or from ruminant hides and skins						
Gelatine and collagen from non-ruminants						
Egg, egg products, milk, milk products, colostrum						

Source: FEFAC

Livestock represents the primary market for EU-produced cereals, accounting for 61% of internal usage. Up to 32% of cereals consumed in the EU are directly used by farmers to feed their animals. In addition, 29% of cereals are used by the industrial compound feed industry. The food industry represented 23% of internal usage, followed by industrial use incl. Biofuels (11%) and seeds (4%).



Source: FEFAC based on DG AGRI market balance sheets

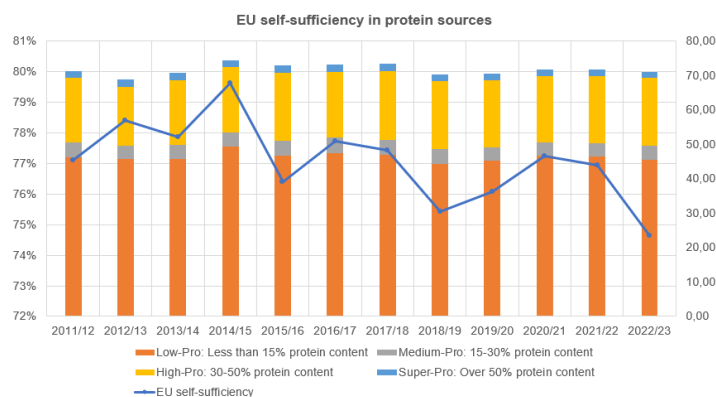
Focus on protein

In the feed sector, it is important to distinguish different protein sources based on protein content:

- "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

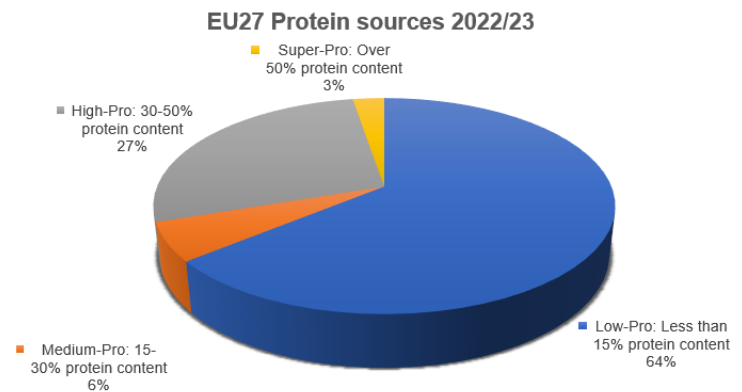
The European Union displays a high level of dependency concerning imports of high protein feed materials, such as oilseed meals, averaging at 75% over the past decade (self-sufficiency rate: 25%). On the other hand, supplementary categories of protein feed materials display relatively higher self-sufficiency ratios: 96% for low-protein sources, 88% for medium-protein sources, and 85% for super-protein sources. Throughout the initial years of the previous decade, the EU experienced a consistent increase in self-sufficiency regarding protein-rich feed materials.

This was a consequence of the biofuel industry's expansion as well as the production of protein-rich co-products such as rapeseed meal and Dried Distillers' Grains and Solubles (DDGS). However, recent data indicates a stagnation in this rising trend. This stagnation may be attributed to some EU countries either ceasing the use of certain biofuels or reducing blending mandates while redirecting subsidies towards 'advanced' biofuels. Severe climate change related catastrophes such as intensive droughts in Southeastern Europe are also a cause of this stagnation.



Source: FEFAC based on EU feed protein balance sheets

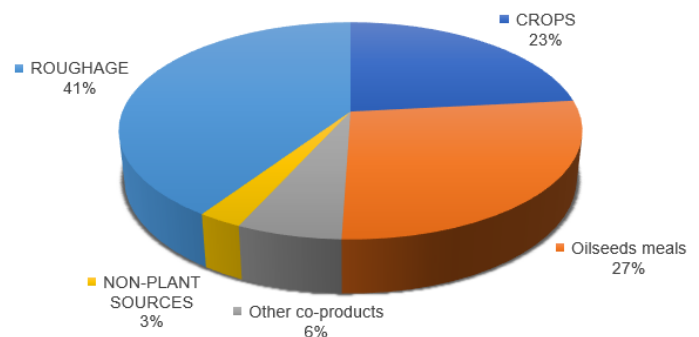
The low-protein category emerges as the primary contributor to the feed protein basket, constituting 64% of the total protein supplies. This is followed by the high protein category at 27%, with the medium-protein category contributing 6%, and the super-protein category accounting for 3%.



Source: FEFAC based on EU feed protein balance sheet 2022/23

Roughage, particularly grass, stands as the primary protein source, comprising 41% of the supply in protein equivalent, for the EU livestock sector. Following closely are co-products (mainly oilseed meals), contributing 33%, while feed crops contribute 23%. Non-plant sources, including whey powder, processed animal proteins, and former foodstuffs, constitute a smaller fraction at 3%.

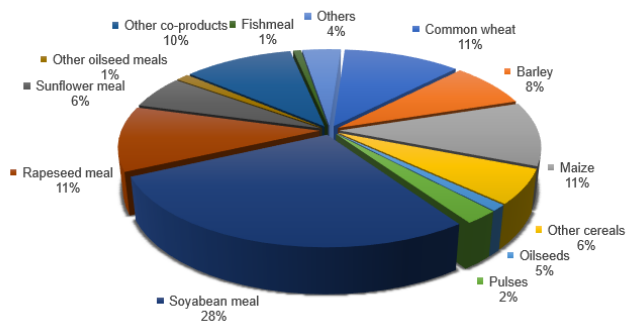
EU27 Protein sources 2022/23 (71 MT of crude protein)



Source: FEFAC based on EU feed protein balance sheet

With roughages excluded, up to 46% of the protein supply comes from oilseed meals, 39% mainly from EU-produced cereals and 10% from co-products (i.e. molasses, beet pulp pellets, starch industry protein products, distiller dried grains with soluble etc.).

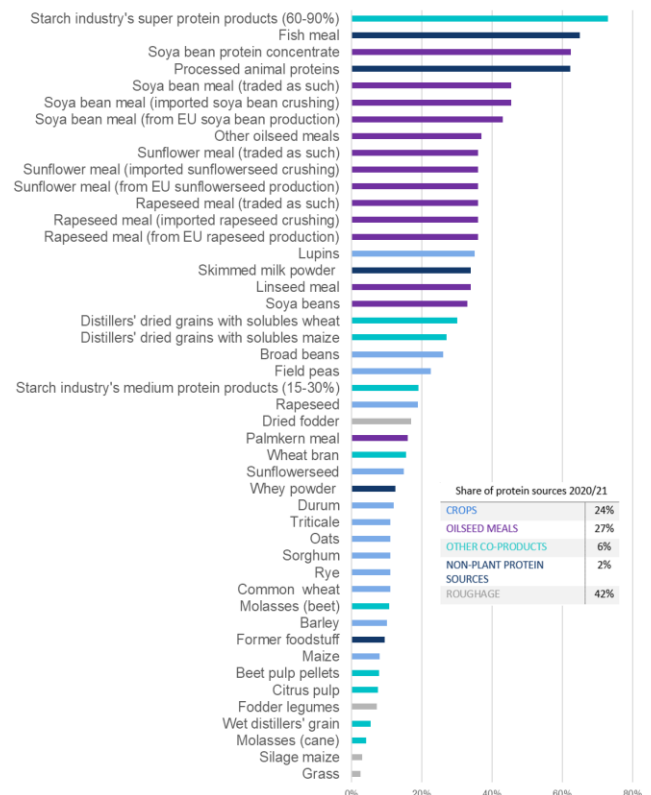
Sources of proteins for feed use in the EU27 in 2022/23



Source: FEFAC based on EU feed protein balance sheet 2022/23

The most highly concentrated feed protein sources are potato proteins (>70%) and fish meal (65%). However, they account only for a small portion of the overall supply, accounting for 0.7% and 0.4%, respectively. Similarly, whereas processed animal protein makes up 62% of total protein, its usage remains limited to only 1.3% of the crude protein supply. This limitation is due to (1) market acceptance issues (2) legal requirements (single species feed mills) (3) availability and competitiveness among species.

Feed sources - protein content



Source: FEFAC based on the EU feed protein balance sheets

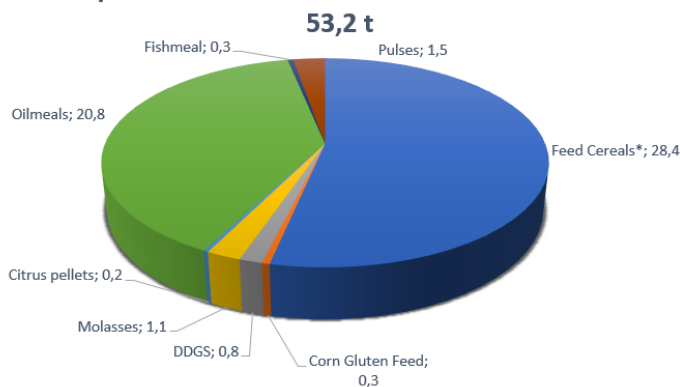
Oilseed meals stand out as one of the finest protein sources to be used in feed, both financially and nutritionally. Depending on the type of oilseed, protein concentrations can range from 16% to 45.5%. They provide both high protein content and quality, boasting a favorable amino acid profile.

Oilseed meals collectively contribute significantly to the protein supply, accounting for 46% compared to 10% from other co-products like DDGS and maize gluten feed. Despite cereals' relatively lower protein content at 11%, they still contribute substantially, representing 39% of the total protein supply.

Focus on import

In 2022, the EU-27 imported a total of 53.2 million tons of feed materials. While oilseeds have historically been the primary imports, exceeding 20 million tons over the last decade, in 2023, the EU imported the highest quantity of feed cereals, amounting to 28.4 million tons. Oilseeds ranked second, with 20.8 million tons imported. Additionally, smaller quantities of feed materials were sourced by the EU, including pulses (1.5 million tons), molasses (1.1 million tons), DDGS (0.8 million tons), corn gluten feed (0.3 million tons), citrus pellets (0.2 million tons), and fishmeal (0.3 million tons).

Imports of feed materials in the EU27 in 2023:

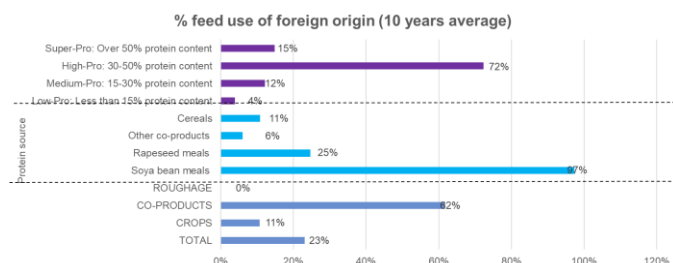


Source: FEFAC based on Eurostat

The European Union is mostly dependent (75%) on imported high-protein feed sources (with protein content ranging from 30-50%), primarily sourced as co-products (62%) from Third Countries, such as soybean meal (97%), linseed meal, and palm kernel expeller. Rapeseed meal stands out as the sole meal with relatively low import dependency (25%).

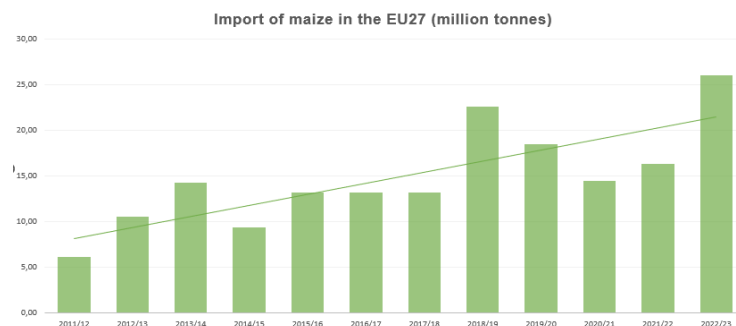
This is due to the EU biofuel policies like the Renewable Energy Directive (RED) of 2009, which incentivized biofuel production and therefore boosted rapeseed meal output. Overall, the EU maintains a moderately low dependency on total feed proteins (23%), with

77% of total feed proteins being locally produced. Notably, roughage emerges as the only feed protein source for which the EU accomplishes complete self-sufficiency. Moreover, the EU reveals considerable self-reliance in other co-products (94%) such as DDGS, wheat bran, beet pulp pellets, and cereals production (90%).



Source: FEFAC based on DG AGRI data

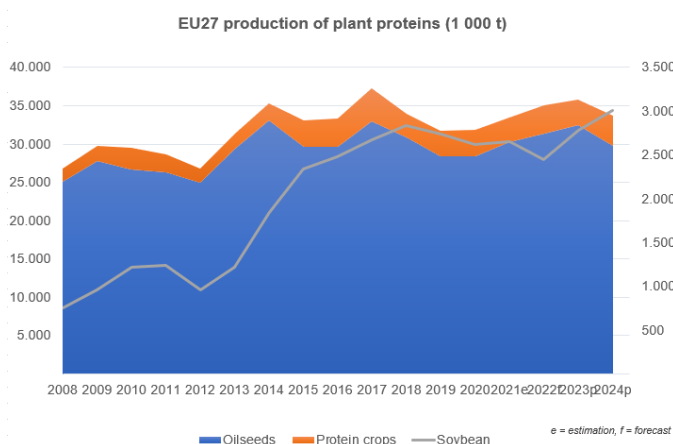
For many years, the EU feed sector sourced more than 90% of its cereals needs locally. However, as illustrated in the graph below, there is a noticeable upward trend in maize imports, signaling a potential increase in dependency within this category – specially with an increase trend of maize imports from the US to Spain, Portugal and Ireland.



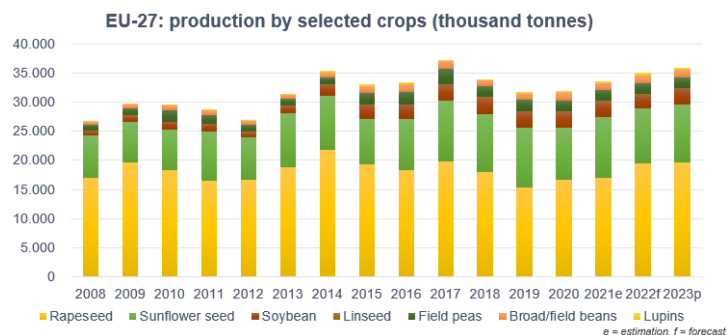
Source: FEFAC based on EU feed protein balance sheets

Focus on soy

In 2018, the European Commission published a report on the development of plant proteins in the European Union, highlighting the sector's dynamic development in recent years. Over the past 5 years, EU oilseed production has flattened by an increase of 0,7%, while protein crops experienced a notable 12% increase. Notably, soybeans emerged as the most successful domestically grown oilseed plant, with production more than tripling since 2013, soaring from 0.96 million tons to 2.78 million tons by 2023. Similarly, Broad/field beans witnessed a substantial growth among protein crops during the same period, with production climbing from 0.6 million tons to 1.1 million tons by 2023.

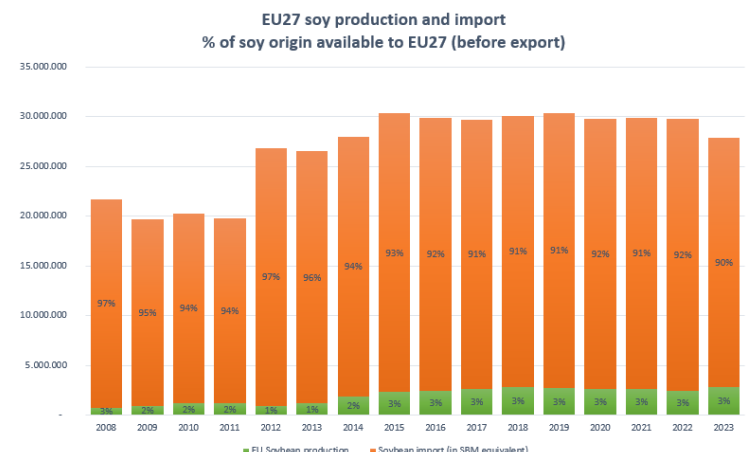


Source: FEFAC based on DG AGRI's data

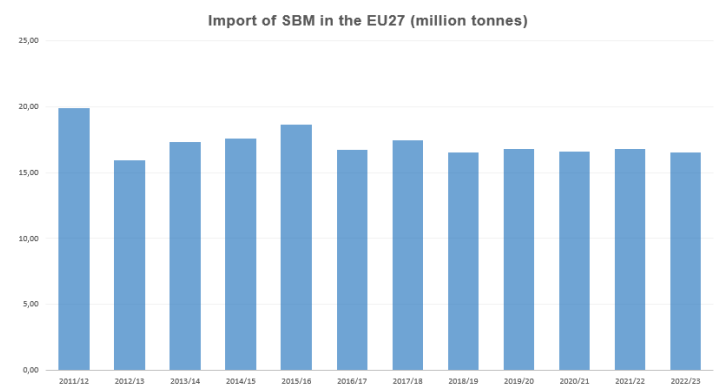


Source: FEFAC based on DG AGRI's data

There is restricted interchangeability among proteins sourced from various vegetable sources, mainly due to their diverse amino acid compositions. This accentuates the high value placed on soybean meal and other high-protein feed materials (ranging from 30% to 50%) in animal nutrition, as they offer an optimal amino acid profile crucial for feed formulation. However, it's essential not to underestimate the contribution of cereals to the overall protein supply. As depicted in the figure below, in the 2022/23 period, cereals contributed 15.1 MT of crude protein (out of 16.6 MT from all crops), compared to 19.3 MT from soybean meals (out of 23.8 MT from all oilseed meals).



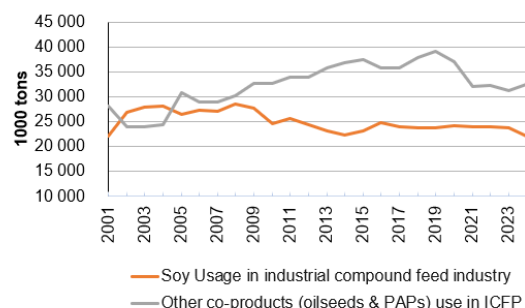
Source: FEFAC based on DG AGRI's data



Source: FEFAC based on DG AGRI's data

It is important to note that co-products from the food industry play a significant role in partially substituting soy usage which has been on a downward trend since 2008.

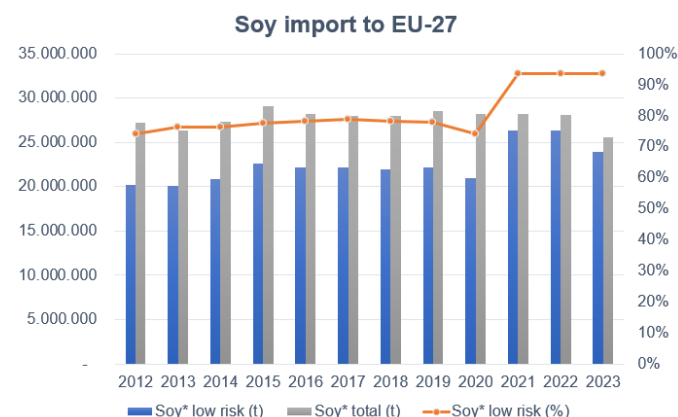
**Usage of soy replaced by higher use of co-products
(1000 tons, EU-27)**



Source: FEFAC based on its own and Eurostat

In 2023 the EU imported 25.5 million tons of soy (in soybean meal equivalent). FEFAC estimates, based on EU trade statistics, the EU feed industry's exposure to soybean meal originating from deforestation-risk areas—such as Brazil's Cerrado, Argentina's Gran Chaco, and Paraguay's Western region—is estimated to be below 10%. This estimate applies both to

soybean meal produced from soybeans imported into the EU and to direct soybean meal imports (see annex Table 5 for details).

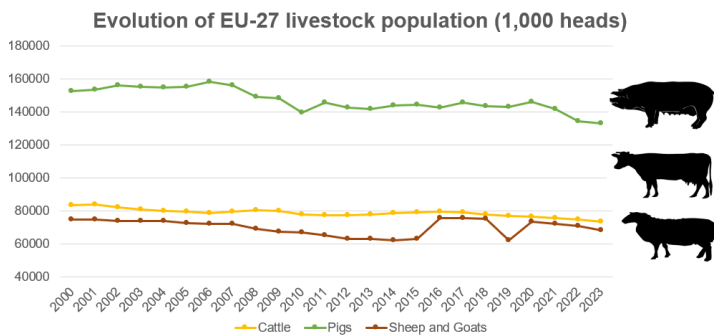


Source: FEFAC based on Eurostat and third countries stakeholder's risk assessment

This means that around 23.8 million tons of soy (in soybean meals equivalent) was sourced from negligible deforestation-risk areas (out of 25.5 million tons of soy).

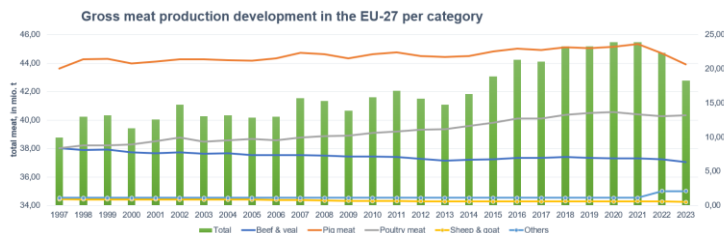
FOOD

The demand for animal feed is closely connected with the demand for livestock products. In 2023, the EU-27 experienced a further decline in its livestock population. Cattle numbers decreased by 1.4%, pigs by 1.1%, and sheep and goats by 3.7% compared to the previous year.



Source: FEFAC based on DG AGRI's data

In 2023, meat production in the EU-27 experienced a decline of 4.3%, totaling 42.8 million tons compared to the previous year. This reduction was primarily driven by decreases across various categories: pig meat production decreased by 7.2% to 20.6 million tons, sheep and goat production dipped by 15% to 0.5 million tons, while poultry meat increased by .9% (13.2 million tons) and beef, and veal production saw a decrease of 5.2% (6.4 million tons).

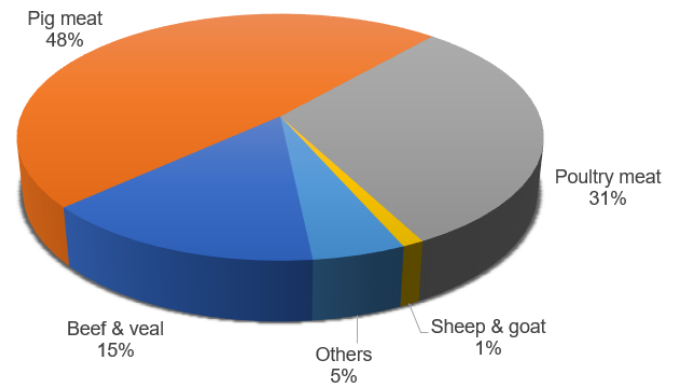


Source: FEFAC based on DG AGRI's data

In terms of meat shares, pig meat dominates EU-27 production, comprising 48%. Poultry meat follows closely behind with a 31% share,

trailing by beef and veal at 15%, with sheep and goat meat accounting for the remaining 1%.

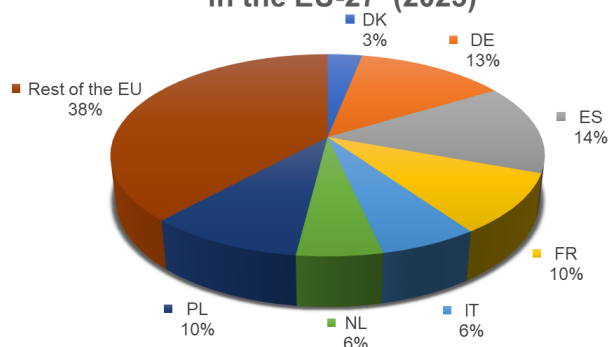
Breakdown of meat production per livestock class in the EU-27 (2023)



Source: FEFAC based on DG AGRI's data

Spain has emerged since 2022 as a dominant force in meat production within the EU-27, achieving an important milestone by securing a 14% market share and boasting a total production of 7.36 million tons. This achievement marks a significant shift, surpassing Germany, which had long held a leading position in meat production now holding a market share of 13% of the market share (6.79 million tons) in 2023. Following Spain and Germany, France claims the third position with a 10% share of the market, yielding 4.9 million tons, while Poland secures fourth position with an equivalent 10% share, producing 5.02 million tons. Italy, contributing 3.18 million tons to the overall production, holds a 6% market share, alongside the Netherlands with 6% market of the market share producing 2.99 million tons and 1.56 million tons, within the EU-27. The collective contribution of the remaining countries constitutes 38% of the market, with a production totaling 15.78 million tons.

Leading meat producing countries in the EU-27 (2023)

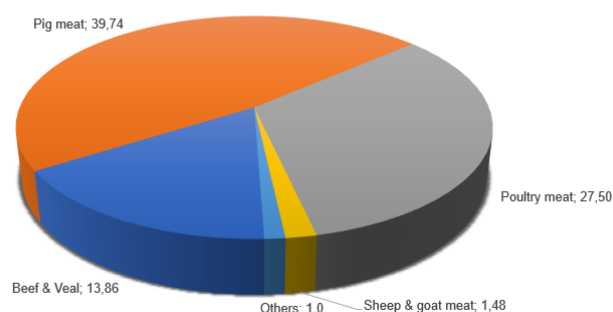


Source: FEFAC based on DG AGRI's data

In 2023, Spain led the EU-27 in pig meat production, yielding 4.8 million tons, followed closely by Germany with 4.2 million tons. France maintained its third position with 2 million tons, trailed by Poland at 1.80 million tons and Denmark at 1.7 million tons. Poland emerged as the largest producer of poultry meat, boasting 2.74 million tons, with Spain following at 1.69 million tons. France and Germany closely trailed with 1.53 million tons and 1.56 million tons respectively, while Italy produced 1.33 million tons. France secured the top spot in beef and veal meat production within the EU-27, contributing 1.3 million tons. Germany followed with 0.99 million tons, and Spain with 0.68 million tons. Italy and Poland rounded out the top five, producing 0.61 million tons and 0.54 million tons respectively. Spain also dominated in sheep and goat meat production, generating 0.1 million tons.

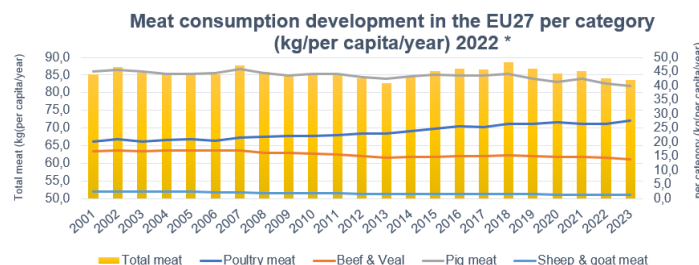
kg/capita/year, 13.8 kg/capita/year for beef and veal and 1.4 kg/capita/year for sheep and goat meat.

Meat consumption in the EU27 per category (kg/per capita/year) 2023*

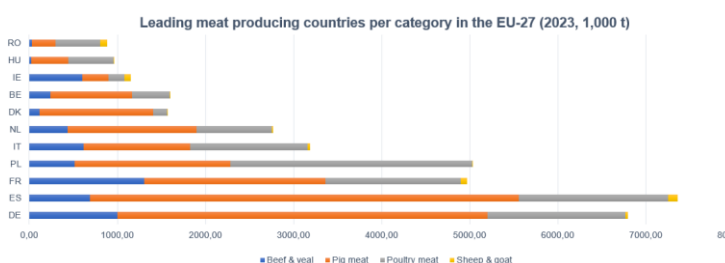


Source: FEFAC based on DG AGRI's data

The average per capita consumption of total meat (including horse meat, rabbits and offals) in 2023 was at 83.5 kg, which was 2% less compared to the previous year – 84.1 kg. The consumption of beef and veal, poultry meat, and sheep and goat meat had a decline in comparison with the figures from 2022, with the biggest impact in pig meat – 4% less in comparison to the last year with 2022.



Source: FEFAC based on DG AGRI's data

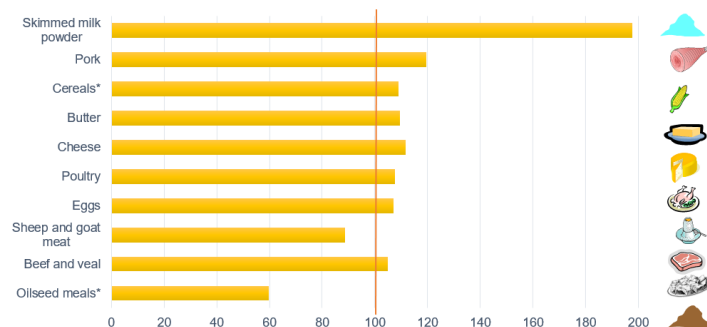


Source: FEFAC based on DG AGRI's data

Pig meat is the most consumed meat in the EU-27, with 39.7 kg/capita/year in 2023, followed by poultry meat with 27.6

The EU is self-sufficient in livestock products, in particular pig meat and dairy products. In spite of challenges such as the COVID-19 pandemic, escalating geopolitical tensions worldwide, and animal diseases, the EU-27 has successfully preserved its position as the leading global exporter of agricultural and food products. However, it is imperative to note that the EU-27 still faces deficits in the production of sheep and goat meat, as well as oilseed meals.

EU27 self-sufficiency for some EU agricultural products in 2023 (in %)



Source: FEFAC based on DG AGRI's data

STATISTICAL ANNEX

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

	CATTLE			PIGS			POULTRY			TOTAL**		
	2023	2023	%TAV	2023	2023	%TAV	2023	2023	%TAV	2022	2023	%TAV
DE	6.710	6.477	-3,5	8.541	8.043	-5,8	6.192	6.268	1,3	22.204	21.500	-3,2
FR	5.254	5.356	1,9	4.543	4.296	-5,4	7.677	7.799	1,6	19.234	19.393	0,8
IT	3.705	3.731	0,7	4.043	3.960	-2,1	5.705	6.137	7,6	14.519	14.898	2,6
NL	4.380	4.311	-1,6	4.668	4.349	-6,8	4.153	4.056	-2,3	14.291	13.827	-3,2
BE	1.437	1.434	-0,2	3.249	3.023	-7,0	1.224	1.260	2,9	6.350	6.143	-3,3
IE	3.515	3.466	-1,4	724	663	-8,4	697	690	-1,0	5.158	5.028	-2,5
DK	1.104	1.018	-7,8	2.546	2.088	-18,0	643	644	0,2	4.530	3.976	-12,2
ES	9.059	9.666	6,7	12.987	12.907	-0,6	4.264	4.803	12,6	26.479	27.535	4,0
PT	1.108	1.114	0,5	973	1.101	13,2	1.753	1.905	8,7	4.117	4.436	7,7
AT	634	632	-0,3	267	250	-6,4	721	707	-1,9	1.762	1.734	-1,6
SE	861	861	0,0	338	306	-9,5	715	685	-4,2	1.985	1.927	-2,9
FI	680	673	-1,0	250	231	-7,6	420	420	0,0	1.460	1.434	-1,8
CY	180	180	0,0	5	5	0,0	37	37	0,0	359	359	0,0
CZ	588	596	1,4	707	675	-4,5	1.039	1.006	-3,2	2.436	2.378	-2,4
EE	40	40	0,0	140	140	0,0	48	48	0,0	230	230	0,0
HU	403	461	14,4	1.321	1.262	-4,5	1.786	1.820	1,9	3.637	3.649	0,3
LV	64	64	0,0	66	66	0,0	202	202	0,0	346	346	0,0
LT	155	158	1,9	50	38	-24,0	219	217	-0,9	640	599	-6,4
PL	1.176	1.170	-0,5	2.485	2.370	-4,6	7.247	7.190	-0,8	11.642	11.530	-1,0
SK	179	196	9,8	200	195	-2,7	279	268	-3,8	674	679	0,6
SI	86	89	3,6	43	46	6,0	257	261	1,3	396	399	0,7
BU	196	202	3,1	378	444	17,5	596	632	6,0	1.244	1.338	7,6
RO	90	90	0,0	970	980	1,0	1.670	1.695	1,5	2.870	2.905	1,2
HR	95	95	0,0	260	260	0,0	300	300	0,0	670	670	0,0
EU *	41.699	42.080	0,9	49.755	47.697	-4,1	47.844	49.050	2,5	147.233	146.913	-0,22

* Without Luxembourg, Greece and Malta

** including milk replacers and feed for other animal species (goats, sheep, fish, games, rabbits, horses)

Table 2: EU compound feed production (1000 t)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total	149,2	151,4	151,8	153,4	155,3	158,3	161,4	164,9	164,7	150,6	152,0	147,3	146,91
Cattle	39,8	41,5	42,4	42,7	42,4	43,6	45,5	48,1	47,7	42,4	42,3	41,7	42,08
Pigs	50,4	49,8	49,2	49,9	50,6	50,8	51,4	51,5	51,7	51,3	52,7	49,9	47,70
Poultry	50,6	51,4	51,4	52,0	53,0	54,9	55,1	55,7	56,0	48,9	48,9	47,7	49,05

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

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2023
Turnover	41.130	43.372	49.470	53.460	51.665	49528	49.707	49.748	51.080	54.070	55.421	50.200	56.207	73.791

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

EU	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Feed cereals	72.194	73.368	73.898	73.648	75.215	79.097	79.938	81.852	83.011	76515	77.479	74.326	74.646
Tapioca	0	0	22	2	4	0	0	0	0	0	0	0	0
Co-products from Food and Bioethanol Industries	17.352	17.108	17.665	17.928	17.224	18.232	20.025	20.790	20.080	17775	18.039	17.946	17.525
Oils and Fats	2.655	2.568	2.579	2.852	3.005	2.726	2.796	2.856	2.806	2545	2.590	2.656	2.657
Cakes and Meals	40.759	41.590	41.307	42.487	42.813	41.068	41.204	41.632	40.753	37772	37.641	36.561	36.485
Animal meals	473	459	455	441	698	698	736	780	800	697	694	725	707
Dairy products	1.249	1.248	1.229	1.237	963	713	713	713	714	727	727	687	687
Dried forage	2.081	2.075	2.055	2.315	2.108	2.121	2.110	2.178	2.232	2306	2.336	2.303	2.295
Pulses	1.905	1.759	2.071	1.915	1.983	2.230	2.228	2.300	2.161	2026	2.022	2.005	2.070
Minerals, Additives and Vitamins	4.351	4.408	4.342	4.714	4.924	5.337	5.529	5.647	5.603	5083	4.947	4.704	4.819
All others	6.184	6.781	6.127	5.833	6.330	6.049	6.070	6.162	6.566	5148	5.476	5.458	5.334

Table 5: EU import of soy from negligible deforestation-risk areas

Raw material	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Soybeans (t)	9.822.230	9.415.068	10.691.618	11.137.731	10.442.825	11.810.005	11.682.688	11.103.172	13.689.161	13.282.406	12.720.608
Soybean meal (t)	12.291.301	13.341.759	14.015.406	13.250.359	13.781.145	12.493.962	12.868.955	12.048.699	15.421.321	15.745.117	13.714.352
Soy* low risk (t)	20.149.084	20.873.813	22.568.701	22.160.544	22.135.405	21.941.966	22.215.105	20.931.237	26.372.650	26.371.041	23.890.839
Soy* low risk (%)	76%	76%	78%	78%	79%	78%	78%	74%	94%	94%	93%

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FEFAC aisbl

Rue de la Loi, 223 Bte 3
B-1040 Bruxelles
Belgium

 +32 (0)2 285 00 50

 fefac@fefac.eu

 www.fefac.eu