

FEED and FOOD

2023

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 21 national Associations in 21 EU Member States as well as Associations in Switzerland, Turkey, Serbia, Russia 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.

Disclaimer

Copyright © FEFAC 1992 All rights reserved. No part of this Yearbook may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording or by any information storage and retrieval system, without permission in writing from the Publisher (FEFAC).

Published in February 2024





TABLE OF CONTENTS

.....	0
FEED and FOOD	0
ABOUT FEFAC.....	1
TABLE OF CONTENTS.....	2
EXPLANATORY NOTES	3
INTRODUCTION	4
FEED	5
EU COMPOUND FEED INDUSTRY 2022 (1000 t).....	5
FEEDING EU LIVESTOCK.....	7
CONSUMPTION OF FEED MATERIALS	8
Focus on protein.....	9
Focus on import.....	11
Focus on soy	12
FOOD	14
STATISTICAL ANNEX.....	17

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.

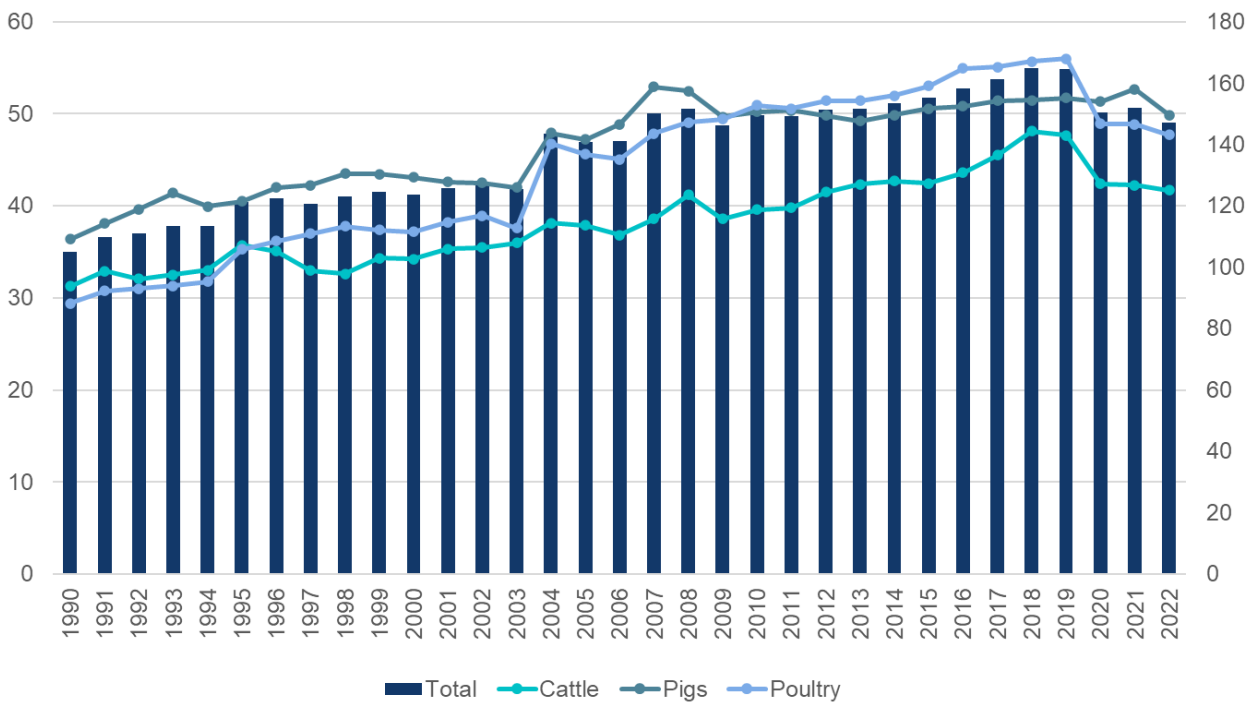
FEFAC: data per the EU as EU-15 from 1994, EU-25 from 2004, EU-27 from 2007, EU-28 from 2013, EU-27 from 2020, excl. EL, LU, MT and in Million tons (MT).

INTRODUCTION

This publication aims to offer a comprehensive overview of the economic development within the European feed sector. It focuses on the feed industry's role as an integral 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 and geopolitical tensions, notably the conflict in Ukraine, 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)

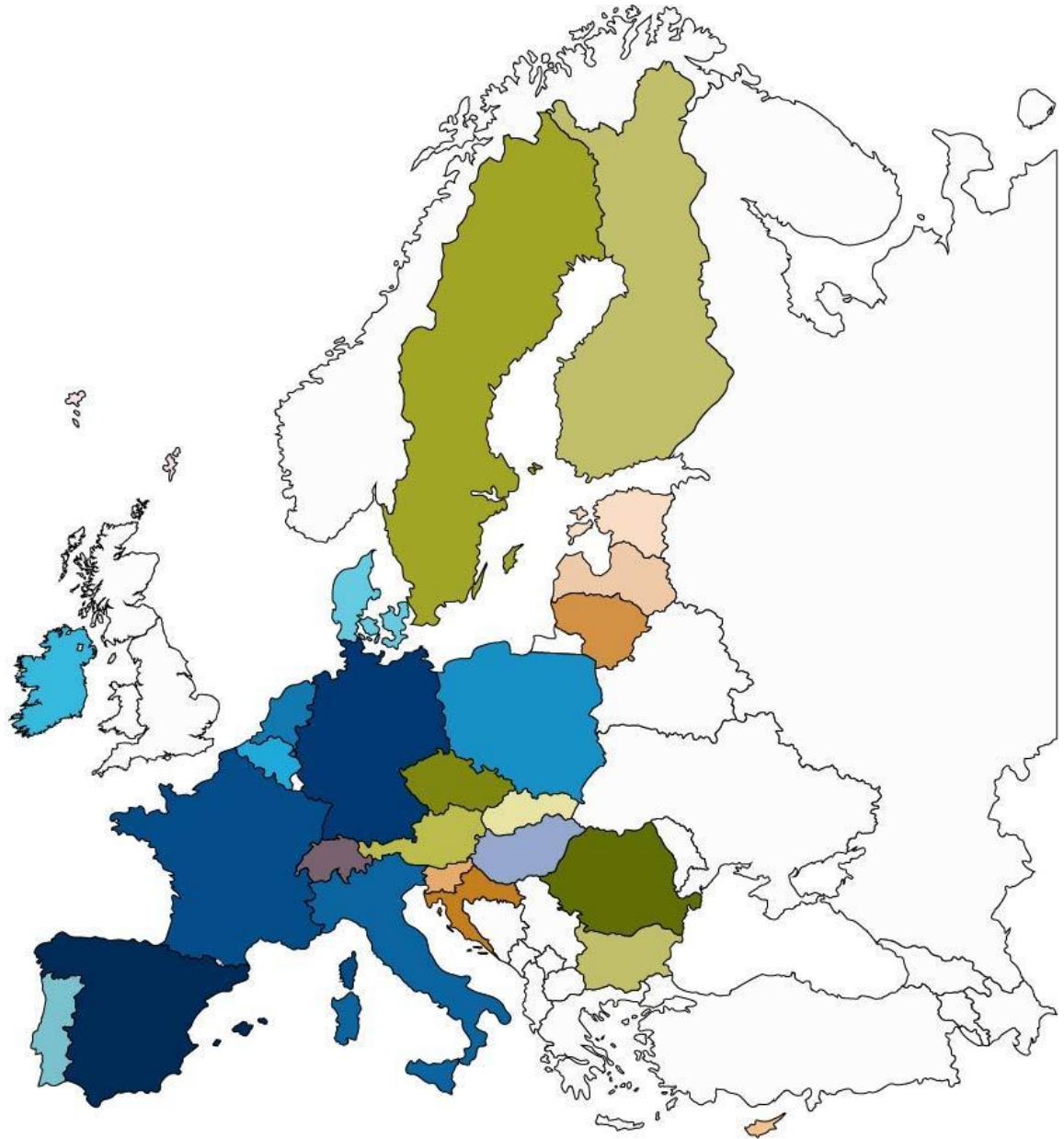


Source: FEFAC

FEED

EU COMPOUND FEED INDUSTRY 2022 (1000 t)

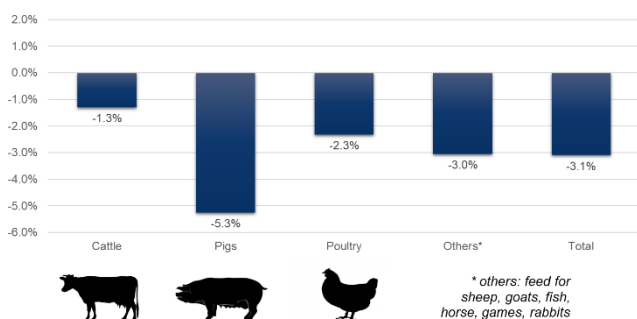
EE	230
LV	346
CY	359
SI	396
LT	640
HR	670
SK	674
BU	1.244
FI	1.460
AT	1.762
SE	1.985
CZ	2.436
RO	2.870
HU	3.637
PT	4.146
DK	4.530
IE	5.158
BE	6.350
PL	11.642
NL	14.291
IT	14.519
FR	19.234
DE	22.194
ES	26.479



Source: FEFAC

In 2022, compound feed production in the EU reached 147.3 million tons, marking a decrease of -3.1% compared to 2021, as reported by FEFAC members. This decline was observed across all animal feed sectors, with the pig sector experiencing a notable decrease of -5.3% and the poultry sector declining by -2.3%. The primary contributing factor to this downturn was the prevalence of animal diseases such as Avian Influenza (AI) and African Swine Fever (ASF).

Changes in total compound feed production between 2022 and 2021 per category



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 Austria (AT), Finland (FI), Ireland (IE), Poland (PL), Slovenia (SI), and Sweden (SE) managed to either stabilise or increase their feed production levels, though modestly, with Poland 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 2022, poultry feed production decreased by 1.1 million tons (million tons) due to several factors. Countries heavily impacted by Avian Influenza (AI), such as Bulgaria, Czech Republic, France, Hungary, Italy, Slovakia, and Portugal, reduced their poultry production significantly. Additionally, the high cost of utilities during the winter led to some farms skipping cycles, further impacting demand for feed.

The pig feed sector faced a notable decline, witnessing a production drop of nearly 3 million tons compared to 2021. Several Member States, including Belgium, Bulgaria, Czech Republic, Germany, Denmark, France, Ireland, Portugal, 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 Romania impacting the economic efficiency of pig farms.

The production of cattle feed decreased by 0.5 million tons compared to the previous year. This decrease can be attributed to the stabilization of production levels compared to 2021 when a severe drought led to heightened demand for dairy feed, consequently increasing the demand for compound feed.

Poland was the best-performing country, with an annual growth of +8.6% for the total compound feed production, boosted by the demand for pig compound feed. Conversely, several other major compound feed-producing countries, including Italy (-4.4%), Spain (-2.8%), Germany (-5.8%), the Netherlands (-0.7%), and France (-6.6%), experienced declines in their total feed production volumes, reflecting various economic and market factors.



Changes in total compound feed production between 2022 and 2021 in certain EU countries

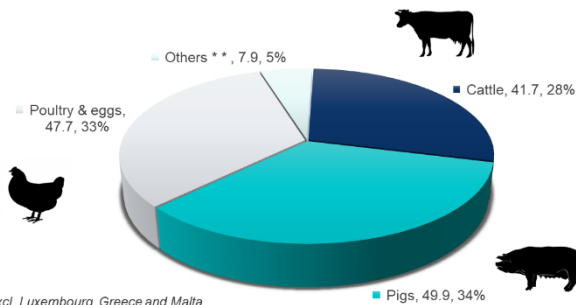


Source: FEFAC

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 9.1 million tons and 12.9 million tons respectively, while France maintains its dominance in poultry feed production with 7.7 million tons

Overall, the pig feed sector stands out as the largest segment of industrial compound feed production in the EU-27, accounting for 49.9 million tons, followed closely by poultry feed at 47.7 million tons and cattle feed at 41.7 million tons.

Industrial compound feed production in EU* per category in 2022, 147.3 MT



* excl. Luxembourg, Greece and Malta
** others: feed for sheep, goats, fish, horse, games, rabbits

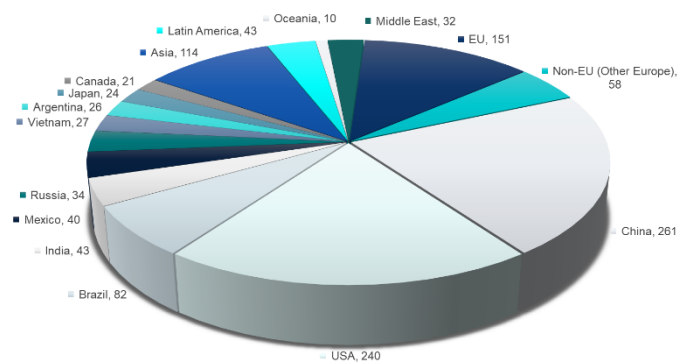
Source: FEFAC

The compound feed industry has experienced a significant shift towards capital intensiveness in recent years, driven by a growing reliance on technological advancements to enhance efficiency and sustainability. Utilising advanced methods, feed formulations are tailored to meet the specific needs of livestock farmers, with a particular 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 ensuring 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 1,206 million tons

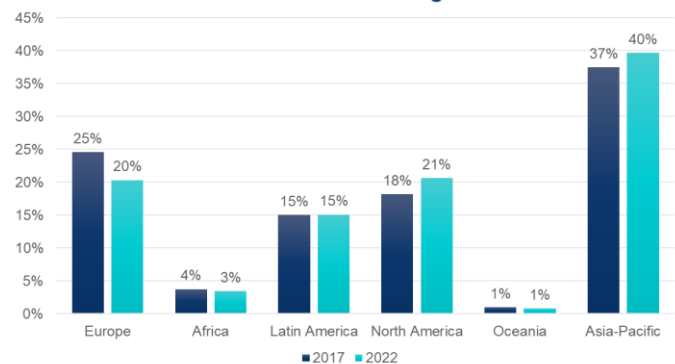
Global compound feed production in 2022 (1206.8 MT)



Source: FEFAC based on Alltech

The EU's global market share has experienced a 5% decline over the past 5 years, primarily attributed to the notable surge in feed production experienced in Asia-Pacific and North America during the same period.

Market share change

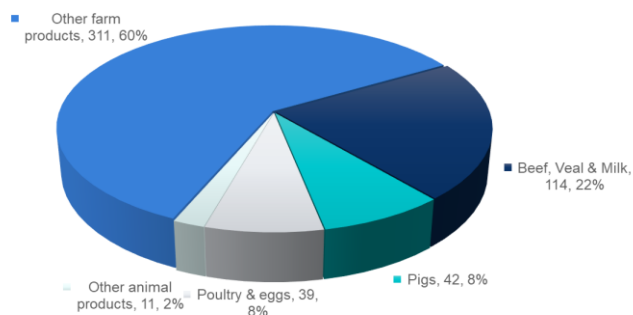


Source: FEFAC based on Alltech

FEEDING EU LIVESTOCK

The livestock sector, valued at €206 billion, accounts for 40% 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 €114 billion, among livestock products. Following closely are pigs at €42 billion, poultry and eggs at €39 billion, with other animal products, including sheep and goats, contributing €11 billion. In total, the agricultural output of the EU-27 reached €517 billion in 2022.

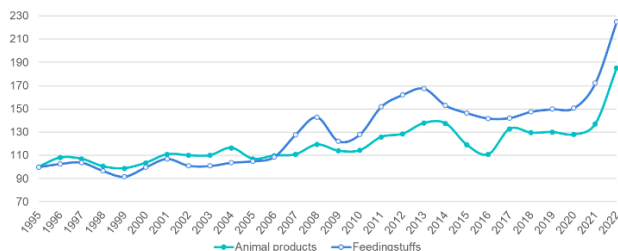
Value of farm production in 2022 in the EU (bio. €)



Source: FEFAC based on Eurostat

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

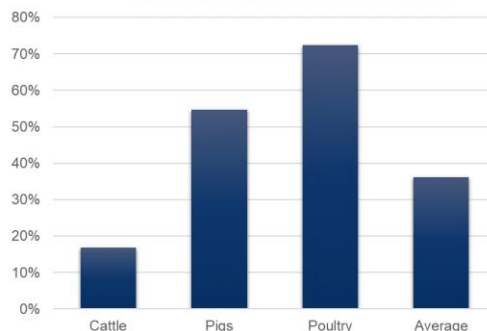
Comparison between producer prices for animal products and feedingstuff prices (Nominal Index 1995=100)



Source: FEFAC based on Eurostat

Animal feed stands out as the single most significant cost factor in livestock production. In 2022 up to 72% of the farm gate value of poultry, 55% of the farm gate value of pigs and 17% of the farm gate value of cattle.

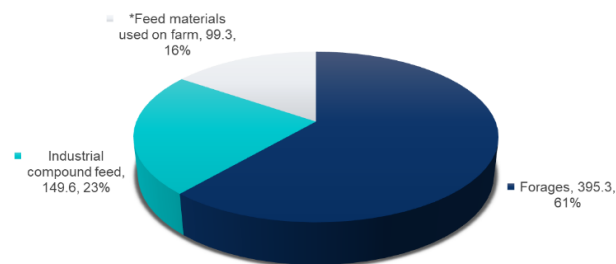
Value of purchased compound feed in total animal output value in 2022



Source: FEFAC based on Eurostat

The yearly feed consumption of farm animals in the European Union amounts to about 644 million tons, comprising both feed materials. Among these, 395 million tons are roughages sourced directly from farms. The remaining amount of 249 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 99 million tons of feed materials are utilized directly on the farm. Additionally, in 2021/22, 149.6 million tons of compound feed were produced, constituting 23% of the total feed basket.

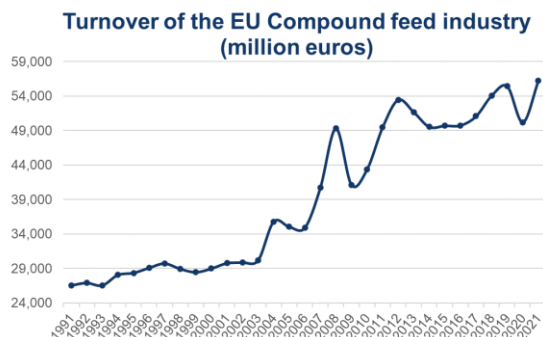
Livestock sourcing in feed in the EU27 in 2021/2022: 644 MT (%)



Source: FEFAC based on Eurostat



Turnover of the EU-27 industrial compound feed industry was 56 billion euros in 2021.



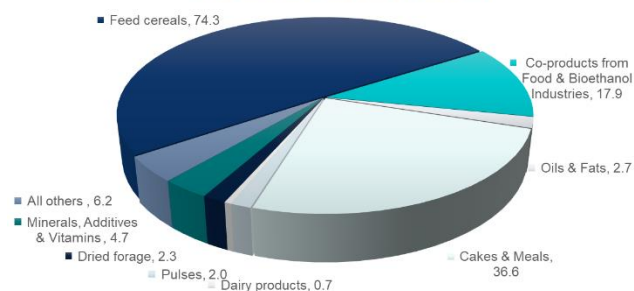
Source: FEFAC

CONSUMPTION OF FEED MATERIALS

The role and expertise of feed formulators are crucial in producing feeds that meet the nutritional requirements of animals to support optimal performance. This involves selecting a wide 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 2022, the compound feed industry of the EU-27 collectively produced 147.3 million tons of feed. This contained 74.3 million tons of feed cereals, 36.6 million tons of cakes and meals, 17.9 million tons of co-products from the food and bioethanol industries, 4.7 million tons of minerals, additives, and vitamins, 2.7 million tons of oils and fats, 2.3 million tons of dried forage, 2.0 million tons of pulses, and 6.2 million tons of various other feed materials such as former foodstuffs, straw, microbial biomass, among others.

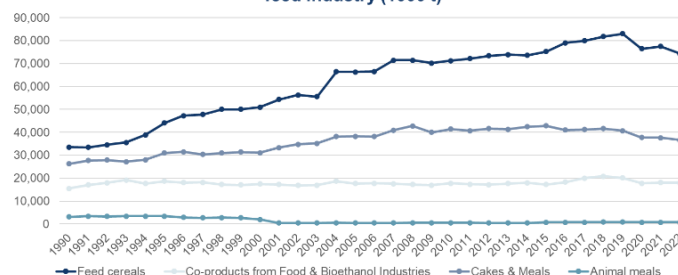
EU-27 Feed material consumption by the compound feed industry in 2022 (147.3 MT)



Source: FEFAC

Over the last 10 years, the proportion of feed cereals (49.5%) 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.

Development of raw materials consumption by the EU compound feed industry (1000 t)

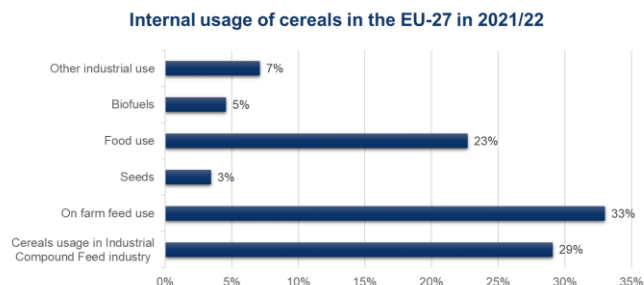


Source: FEFAC



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.

Livestock represents the primary market for EU-produced cereals, accounting for 62% of internal usage. Up to 33% 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 (3%).



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 shows a high level of dependency concerning imports of high protein feed materials, such as oilseed meals, averaging at 72% over the past decade (self-sufficiency rate: 28%). Conversely, other 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.

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	Red	Red	Red	Red	Red	Green
Blood products from ruminants	Red	Red	Red	Red	Red	Green
Hydrolysed proteins from ruminants tissues other than hides and skins	Red	Red	Red	Red	Red	Green
Non-ruminant PAP, including non-ruminant blood meal but excluding fishmeal, porcine PAP and poultry PAP	Red	Red	Red	Red	Red	Green
Porcine PAP	Red	Red	2021	2013	Red	Green
Poultry PAP	Red	2021	2013	Red	Red	Green
Insect PAP	Red	2021	2017	Red	Red	Green
Gelatine and collagen from ruminants	Red	2021	Fish	2021	2021	Green
Fishmeal	Red	Red	Red	Red	Red	Green
Blood products from non-ruminants	Red	Red	Red	Red	Red	Green
Di and tricalcium other than those mentioned elsewhere in the table	Red	Red	Red	Red	Red	Green
Hydrolysed proteins from non-ruminants or from ruminant hides and skins	Red	Red	Red	Red	Red	Green
Gelatine and collagen from non-ruminants	Red	Red	Red	Red	Red	Green
Egg, egg products, milk, milk products, colostrum	Red	Red	Red	Red	Red	Green

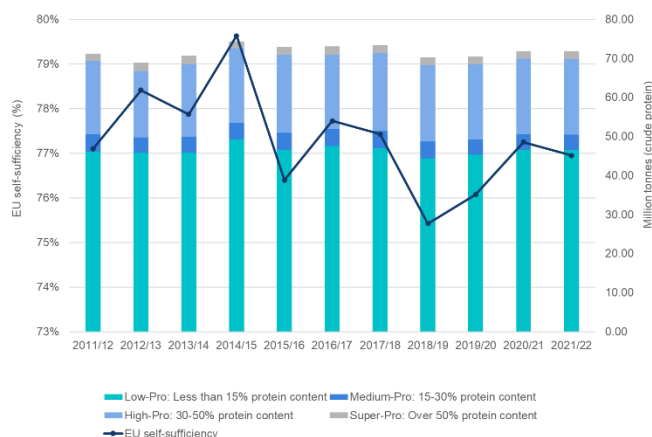
Source: FEFAC



This was a result 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 upward trend. This stagnation may be attributed to some EU countries either discontinuing the use of certain biofuels or reducing blending mandates while redirecting subsidies towards 'advanced' biofuels.

Roughage, particularly grass, stands as the primary protein source, comprising 42% 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 2%.

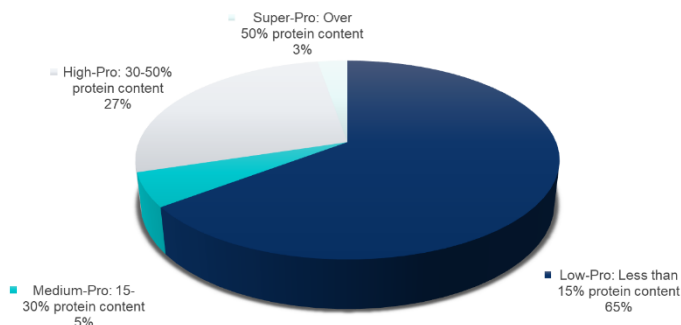
EU self-sufficiency in protein sources



Source: FEFAC based on EU feed protein balance sheets

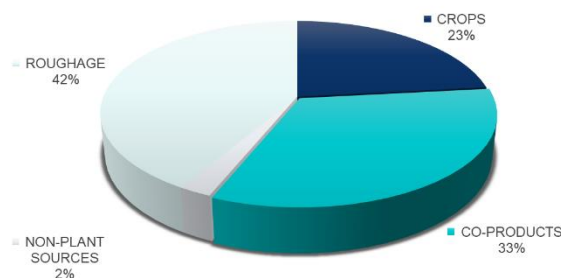
The low-protein category emerges as the primary contributor to the feed protein basket, constituting 65% of the total protein supplies. This is followed by the high protein category at 27%, with the medium-protein category contributing 5%, and the super-protein category accounting for 3%.

EU27 Protein sources 2021/22



Source: FEFAC based on EU feed protein balance sheet 2021/22

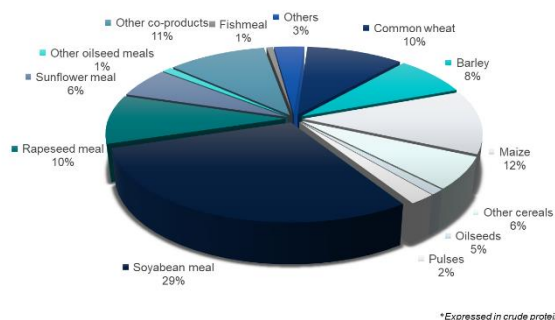
EU27 Protein sources 2021/22 (72 MT of crude protein)



Source: FEFAC based on EU feed protein balance sheet

With roughages excluded, up to 46% of the protein supply comes from oilseed meals, 40% mainly from EU-produced cereals and 11% 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 2021/22

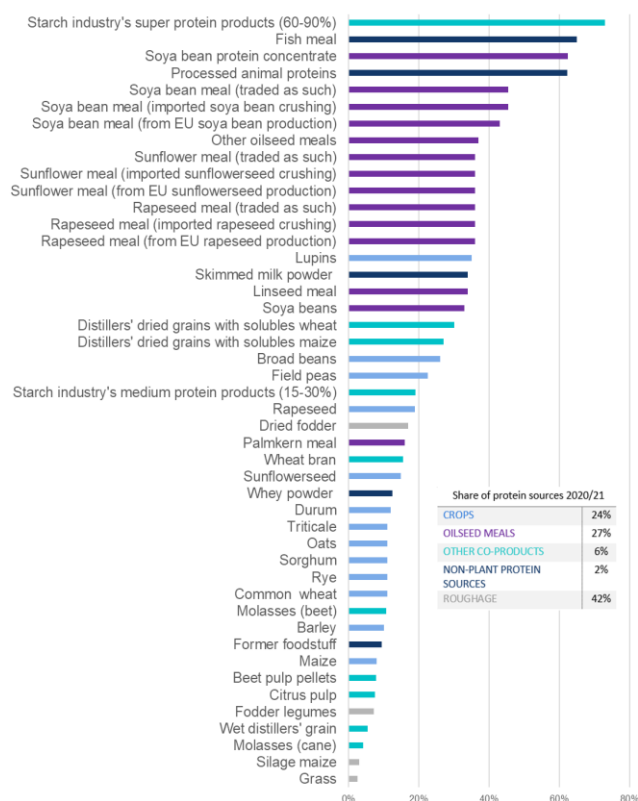


Source: FEFAC based on EU feed protein balance sheet 2021/22



The most highly concentrated feed protein sources are potato proteins (>70%) and fish meal (65%). However, they represent only 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

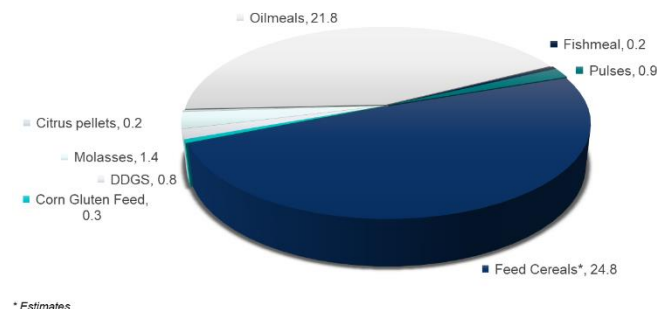
Oilseed meals stand out as one of the best protein sources to be used in feed, both financially and nutritionally. Depending on the type of oilseed, protein concentrations can range from 16% to 45.5%. They provide both high protein content and quality, boasting a favorable amino acid profile.

Oilseed meals collectively contribute significantly to the protein supply, accounting for 27% compared to 6% from other co-products like DDGS and maize gluten feed. Despite cereals' relatively lower protein content at 11%, they still contribute substantially, representing 21% of the total protein supply.

Focus on import

In 2022, the EU-27 imported a total of 50.4 million tons of feed materials. While oilseeds have historically been the primary imports, exceeding 20 million tons over the last decade, in 2022, the EU imported the highest quantity of feed cereals, amounting to 24.8 million tons. Oilseeds ranked second, with 21.8 million tons imported. Additionally, smaller quantities of feed materials were sourced by the EU, including molasses (1.4 million tons), DDGS (0.8 million tons), corn gluten feed (0.3 million tons), citrus pellets (0.2 million tons), pulses (0.9 million tons), and fishmeal (0.2 million tons).

Imports of feed materials in the EU27 in 2022: 50.4 MT



Source: FEFAC based on Eurostat

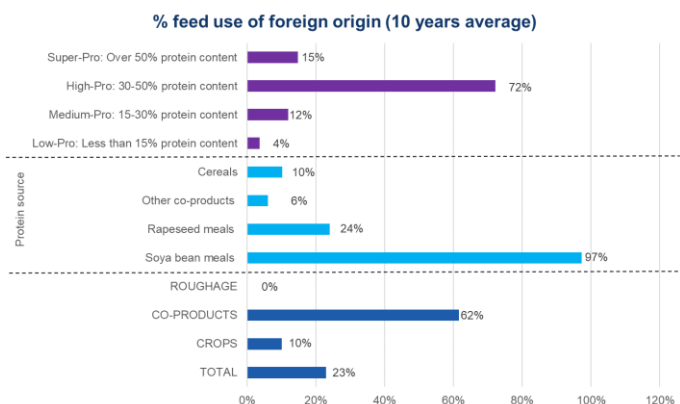
The European Union is mostly dependent (72%) on imported high-protein feed sources (with protein content ranging from 30-50%), primarily sourced as co-products (63%) from Third Countries, such as soybean meal (97%), linseed meal, and palm kernel expeller. Rapeseed meal stands out as the sole meal with relatively low import dependency (24%).



This is due to the EU biofuel policies like the Renewable Energy Directive (RED) of 2009, which incentivized biofuel production and consequently boosted rapeseed meal output. Overall, the EU maintains a relatively low dependency on total feed proteins (23%), with 77% of total feed proteins being domestically produced. Notably, roughage emerges as the only feed protein source for which the EU achieves complete self-sufficiency. Moreover, the EU demonstrates considerable self-reliance in other co-products (94%) such as DDGS, wheat bran, beet pulp pellets, and cereals production (90%).

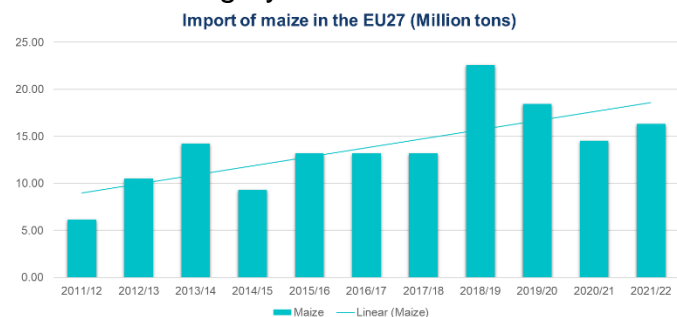
Focus on soy

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 decade, EU oilseed production has increased by 26%, while protein crops experienced a remarkable 85% increase. Notably, soybeans emerged as the most successful domestically grown oilseed plant, with production more than tripling since 2012, soaring from 0.96 million tons to 2.45 million tons by 2022. Similarly, lupins witnessed the most substantial growth among protein crops during the same period, with production climbing from 0.13 million tons to 0.46 million tons by 2022.

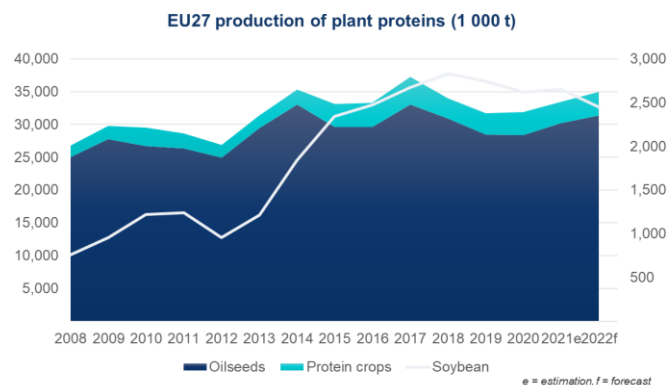


Source: FEFAC based on DG AGRI data

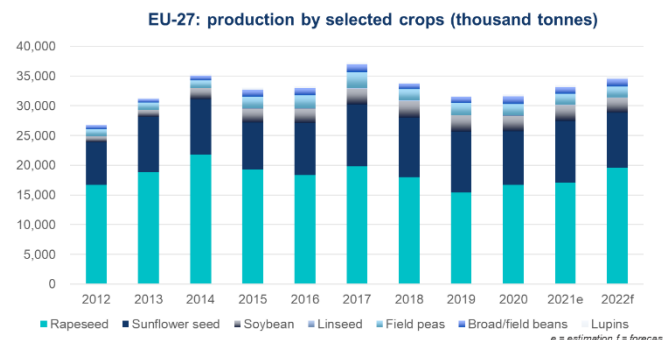
For many years, the EU feed sector sourced more than 90% of its cereals needs locally. However, as illustrated in the graph below, there is a noticeable upward trend in maize imports, signaling a potential increase in dependency within this category.



Source: FEFAC based on EU feed protein balance sheets



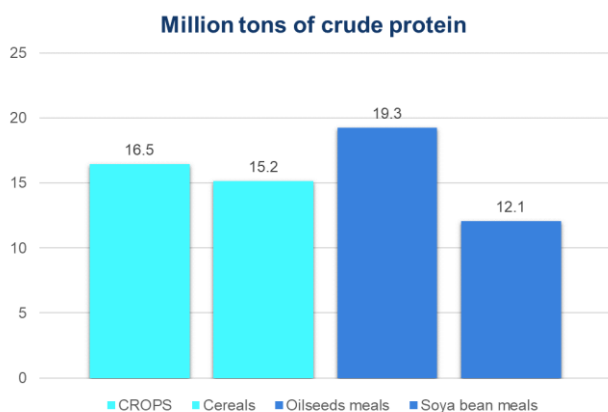
Source: FEFAC based on DG AGRI's data



Source: FEFAC based on DG AGRI's data



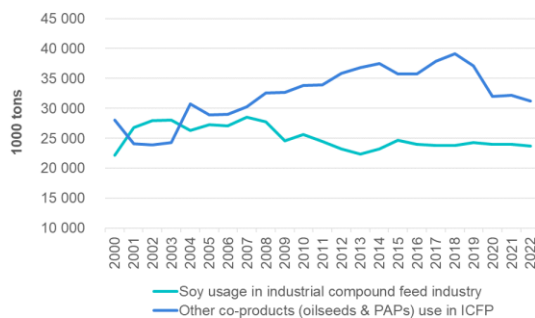
There is limited interchangeability among proteins sourced from various vegetable sources, primarily due to their diverse amino acid compositions. This emphasizes the high value placed on soybean meal and other high-protein feed materials (ranging from 30% to 50%) in animal nutrition, as they offer an 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 2021/22 period, cereals contributed 15.2 MT of crude protein (out of 16.5 MT from all crops), compared to 12.1 MT from soybean meals (out of 19.3 MT from all oilseed meals).



Source: FEFAC based on EU feed protein balance sheet 2021/22

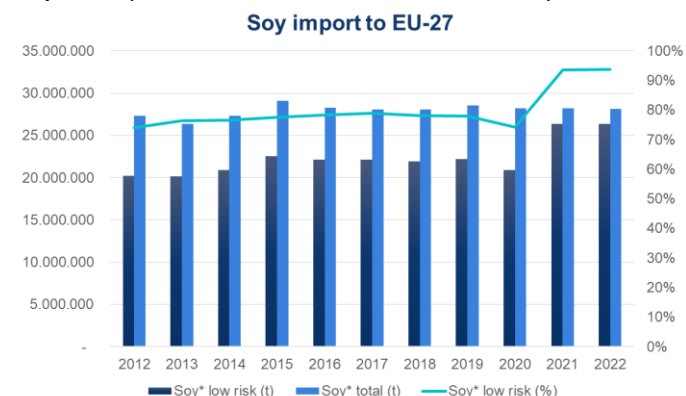
It is important to note that co-products from the food industry play an important role in partially replacing soy usage which has been on a downward trend since 2008.

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



Source: FEFAC based on its own and Eurostat data

In 2022 the EU imported 28.1 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).



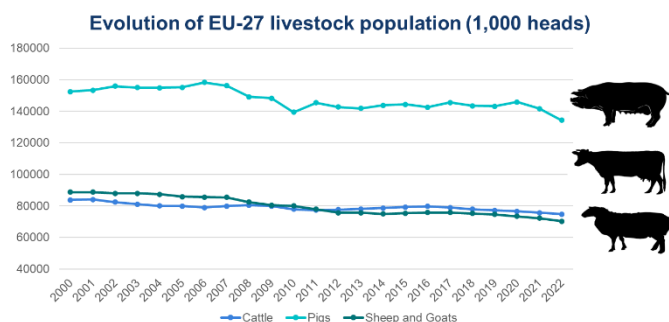
Source: FEFAC based on Eurostat and third countries stakeholder's risk assessment

This means that around 26.3 million tons of soy (in soybean meals equivalent) was sourced from negligible deforestation-risk areas (out of 28.1 million tons of soy).



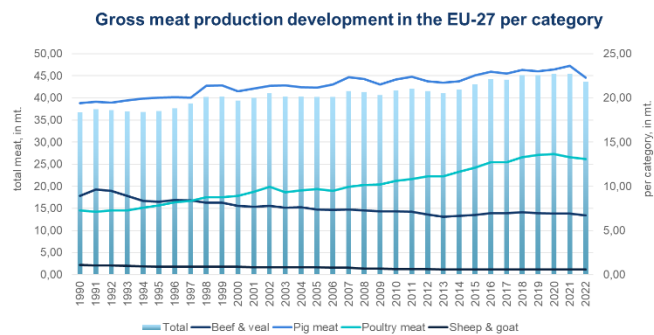
FOOD

The demand for animal feed is closely linked with the demand for livestock products. In 2022, the EU-27 experienced a further decline in its livestock population. Cattle numbers decreased by 1.2%, pigs by 5.1%, and sheep and goats by 2.7% compared to the previous year.



Source: FEFAC based on DG AGRI’s data

In 2022, meat production in the EU-27 experienced a decline of 3.8%, totaling 43.7 million tons compared to the previous year. This reduction was primarily driven by decreases across various categories: pig meat production decreased by 5.7% to 22.3 million tons, sheep and goat production dipped by 0.8% to 0.6 million tons, while poultry meat, beef, and veal production saw respective decreases of 1.7% (13.1 million tons) and 2.3% (6.7 million tons).

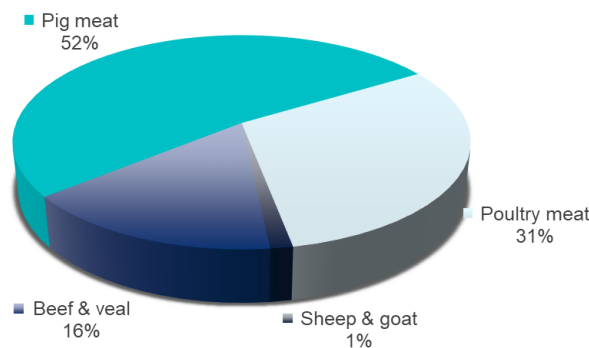


Source: FEFAC based on DG AGRI’s data

In terms of meat shares, pig meat dominates EU-27 production, comprising 52%. Poultry

meat follows closely behind with a 31% share, trailed by beef and veal at 16%, with sheep and goat meat accounting for the remaining 1%.

Breakdown of meat production per livestock class in the EU-27 (2022)

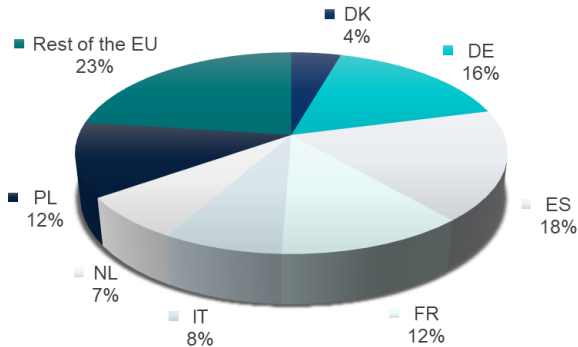


Source: FEFAC based on DG AGRI’s data

Spain has recently emerged as a dominant force in meat production within the EU-27, achieving an important milestone by securing a 1 market share of 18% and boasting a total production of 7.55 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 16% of the market share (7.05 million tons) in 2022. Following Spain and Germany, France claims the third position with a 12% share of the market, yielding 5.09 million tons, while Poland secures fourth position with an equivalent 12% share, producing 5.07 million tons. Italy, contributing 3.23 million tons to the overall production, holds an 8% market share. Additionally, the Netherlands and Denmark stand out as important meat producers, with 7% and 4% of the market share, respectively, and producing 2.99 million tons and 1.88 million tons, within the EU-27. The collective contribution of the remaining countries constitutes 23% of the market, with a production totaling 9.78 million tons.



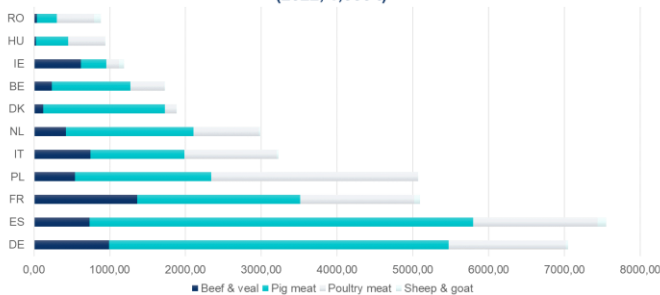
Leading meat producing countries in the EU-27 (2022)



Source: FEFAC based on DG AGRI's data

In 2022, Spain led the EU-27 in pig meat production, yielding 5.07 million tons, followed closely by Germany with 4.49 million tons. France maintained its third position with 2.15 million tons, trailed by Poland at 1.80 million tons and Denmark at 1.61 million tons. Poland emerged as the largest producer of poultry meat, boasting 2.73 million tons, with Spain following at 1.64 million tons. France and Germany closely trailed with 1.50 million tons and 1.54 million tons respectively, while Italy produced 1.21 million tons. France secured the top spot in beef and veal meat production within the EU-27, contributing 1.36 million tons. Germany followed with 0.99 million tons, and Italy with 0.75 million tons. Spain and Poland rounded out the top five, producing 0.73 million tons and 0.54 million tons respectively. Spain also dominated in sheep and goat meat production, generating 0.12 million tons.

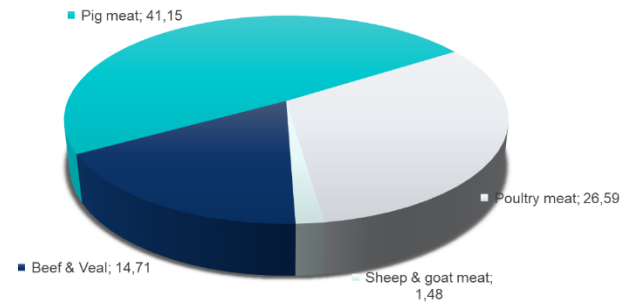
Leading meat producing countries per category in the EU-27 (2022, 1,000 t)



Source: FEFAC based on DG AGRI's data

Pig meat is the most consumed meat in the EU-27, with 41.2 kg/capita/year in 2022, followed by poultry meat with 26.6 kg/capita/year, 14.7 kg/capita/year for beef and veal and 1.5 kg/capita/year for sheep and goat meat.

Meat consumption in the EU27 per category (kg/per capita/year) 2022*

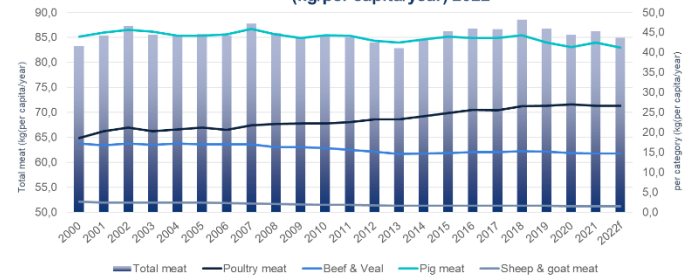


* forecast

Source: FEFAC based on DG AGRI's data

The average per capita consumption of total meat (including horse meat, rabbits and offals) in 2022 was at 84.9 kg, which was 1.3 kilograms less compared to the previous year. While the consumption of beef and veal, poultry meat, and sheep and goat meat remained consistent with the figures from 2021, there was a notable decline in the consumption of pig meat by 1.28 kg.

Meat consumption development in the EU27 per category (kg/per capita/year) 2022 *

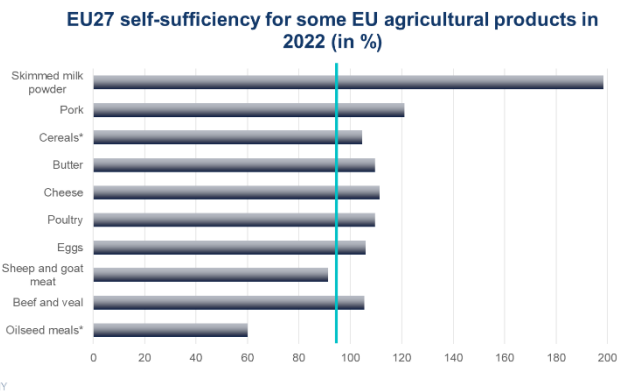


Source: DG AGRI

Source: FEFAC based on DG AGRI's data



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 and escalating geopolitical tensions worldwide, the EU-27 has successfully maintained its position as the leading global exporter of agricultural and food products. However, it is important to note that the EU-27 still faces deficits in the production of sheep and goat meat, as well as oilseed meals.



Source: FEFAC based on DG AGRI's data

STATISTICAL ANNEX

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

	CATTLE			PIGS			POULTRY			TOTAL**		
	2021	2022	%TAV	2021	2022	%TAV	2021	2022	%TAV	2021	2022	%TAV
DE	7.037	6.710	-4,6	9.413	8.541	-9,3	6.358	6.192	-2,6	23.571	22.194	-5,8
FR	5.345	5.254	-1,7	4.846	4.543	-6,3	8.556	7.677	-10,3	20.604	19.234	-6,6
IT	3.659	3.705	1,3	4.101	4.043	-1,4	6.372	5.705	-10,5	15.194	14.519	-4,4
NL	4.318	4.380	1,4	4.772	4.668	-2,2	4.144	4.153	0,2	14.395	14.291	-0,7
BE	1.466	1.437	-2,0	3.558	3.249	-8,7	1.249	1.224	-2,0	6.741	6.350	-5,8
IE	3.350	3.515	4,9	781	724	-7,3	699	697	-0,3	5.066	5.158	1,8
DK	1.130	1.104	-2,3	2.863	2.546	-11,1	673	643	-4,5	4.903	4.530	-7,6
ES	9.320	9.059	-2,8	13.361	12.987	-2,8	4.387	4.264	-2,8	27.238	26.479	-2,8
PT	1.073	1.112	3,6	1.173	1.110	-5,4	1.745	1.636	-6,2	4.268	4.146	-2,9
AT	649	634	-2,3	274	267	-2,6	697	721	3,4	1.761	1.762	0,1
SE	884	861	-2,6	325	338	4,0	697	715	2,6	1.980	1.985	0,3
FI	672	680	1,2	246	250	1,6	418	420	0,5	1.446	1.460	1,0
CY	180	180	0,0	5	5	0,0	37	37	0,0	359	359	0,0
CZ	598	588	-1,7	796	707	-11,2	1.071	1.039	-3,0	2.568	2.436	-5,1
EE	40	40	0,0	140	140	0,0	48	48	0,0	230	230	0,0
HU	433	403	-6,9	1.382	1.321	-4,4	1.997	1.786	-10,6	3.956	3.637	-8,1
LV	64	64	0,0	66	66	0,0	202	202	0,0	346	346	0,0
LT	155	155	0,0	50	50	0,0	217	219	0,9	638	640	0,3
PL	1.213	1.176	-3,1	2.444	2.485	1,7	6.303	7.247	15,0	10.725	11.642	8,6
SK	187	179	-4,3	265	200	-24,4	211	279	32,3	678	674	-0,6
SI	88	86	-2,4	42	43	2,7	258	257	-0,2	394	396	0,6
BU	205	196	-4,4	405	378	-6,7	623	596	-4,3	1.301	1.244	-4,4
RO	90	90	0,0	1.080	970	-10,2	1.600	1.670	4,4	2.910	2.870	-1,4
HR	95	95	0,0	270	260	-3,7	300	300	0,0	680	670	-1,5
EU *	42.251	41.703	-1,3	52.658	49.892	-5,3	48.862	47.727	-2,3	151.952	147.252	-3,1

* Without Luxemburg, 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)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Total	149,6	149,2	151,4	151,8	153,4	155,3	158,3	161,4	164,9	164,7	150,6	152,0	147,3
Cattle	39,6	39,8	41,5	42,4	42,7	42,4	43,6	45,5	48,1	47,7	42,4	42,3	41,7
Pigs	50,2	50,4	49,8	49,2	49,9	50,6	50,8	51,4	51,5	51,7	51,3	52,7	49,9
Poultry	50,9	50,6	51,4	51,4	52,0	53,0	54,9	55,1	55,7	56,0	48,9	48,9	47,7

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

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Turnover	49.321	41.130	43.372	49.470	53.460	51.665	49.528	49.707	49.748	51.080	54.070	55.421	50.200	56.207

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
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
Tapioca	0	0	22	2	4	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
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
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
Animal meals	473	459	455	441	698	698	736	780	800	697	694	725
Dairy products	1.249	1.248	1.229	1.237	963	713	713	713	714	727	727	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
Pulses	1.905	1.759	2.071	1.915	1.983	2.230	2.228	2.300	2.161	2026	2.022	2.005
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
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

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

Raw material	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Soybeans (t)	8.606.411	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
Soybean meal (t)	13.316.943	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
Soy* low risk (t)	20.202.072	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
Soy* low risk (%)	74%	76%	76%	78%	78%	79%	78%	78%	74%	94%	94%

Full members



VFÖ (Austria)



BFA (Belgium)



BFMA (Bulgaria)

CAFM

CAFM (Cyprus)



SKK (Czech Republic)



DAKOFO (Denmark)



FFDIF (Finland)



EUROFAC (France)



DVT (Germany)



HGFA (Hungary)



IGFA (Ireland)



ASSALZOO (Italy)



LGPA (Lithuania)



NEVEDI (Netherlands)



IZP (Poland)



IACA (Portugal)



ANFNC (Romania)



AFPWTC (Slovakia)



CCIS-CAFE (Slovenia)



CESFAC (Spain)



FS (Sweden)

Associate members



FKF AS (Norway)



NSF (Norway)



VSF (Switzerland)



TURKIYEM-BIR
(Turkey)



AIC (United Kingdom)



EFFPA (Europe)



EMFEMA (Europe)



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