FEFAC
Experts in Animal Nutrition

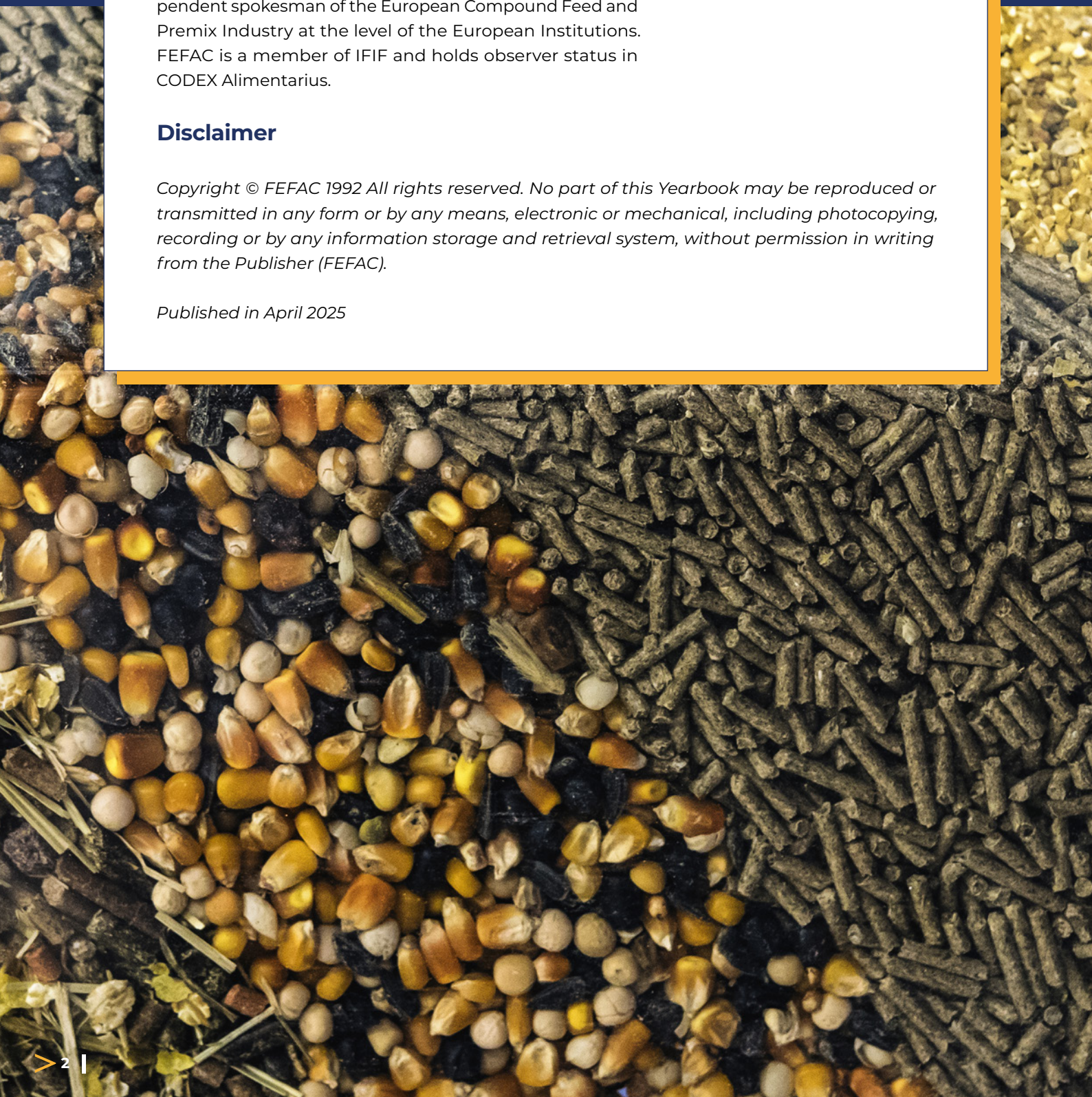
FEED & FOOD 2025

ABOUT FEFAC

The European Feed Manufacturers' Federation (FEFAC), founded in 1959 and headquartered in Brussels, represents 27 national associations in 26 European countries 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.

Disclaimer

Published in April 2025



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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.

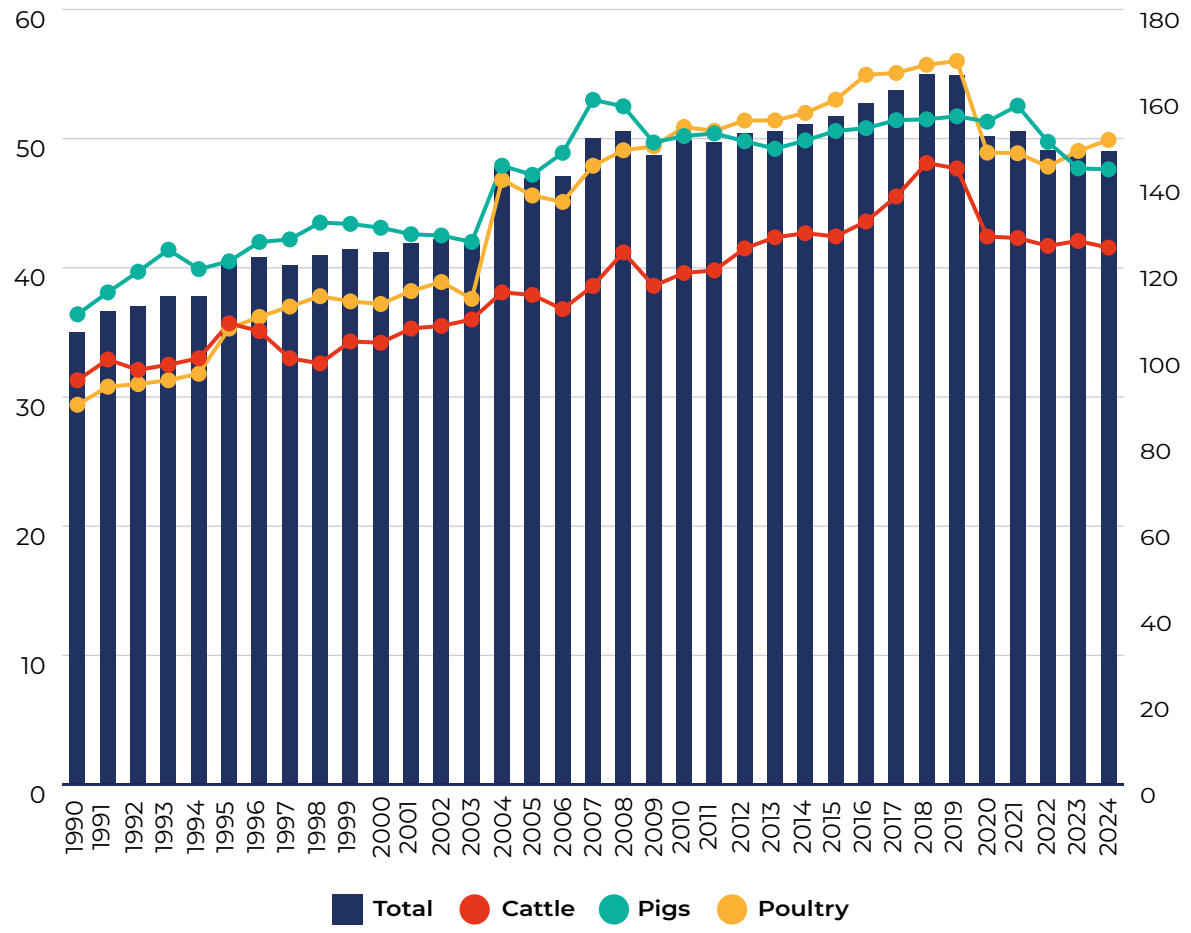
FEFAC: data per the EU as EU-15 from 1994, EU-25 from 2004, EU-27 from 2007, EU-28 from 2013, EU-27 from 2020, excl. EL, LU, MT and in Million tons (MT).

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, animal deceases, geopolitical tensions, notably the conflict in Ukraine, trade disruptions and member states environmental policies, have reverberated throughout the EU livestock sector. These challenges have cast a shadow over the EU feed industry, nevertheless we can see a stable figure in the production.

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

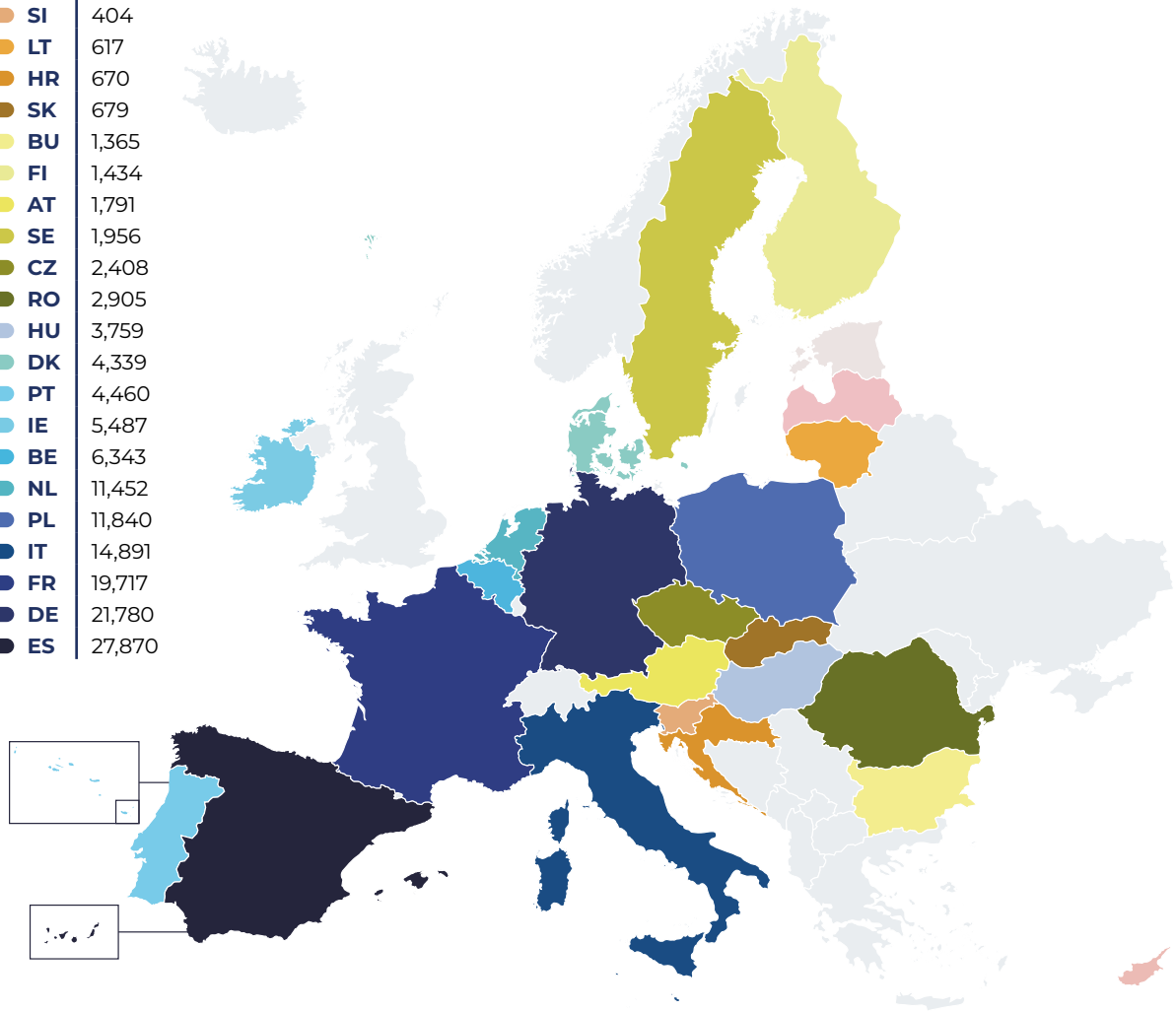


Source: *FEFAC*

FEED

EU compound feed industry production 2024 (1,000 t)

EE	230
LV	346
CY	359
SI	404
LT	617
HR	670
SK	679
BU	1,365
FI	1,434
AT	1,791
SE	1,956
CZ	2,408
RO	2,905
HU	3,759
DK	4,339
PT	4,460
IE	5,487
BE	6,343
NL	11,452
PL	11,840
IT	14,891
FR	19,717
DE	21,780
ES	27,870



* excl. Luxembourg, Greece and Malta

Source: *FEFAC*

In 2024, compound feed production in the EU reached 147.1 million tons, marking a marginal increase of 0.22% compared to 2023, as reported by FEFAC members. This increase was observed across the poultry sector, experiencing an increase of 1.7%, despite the prevalence of animal diseases such as Avian Influenza (AI). The pig sector remained stable (-0,1%) since the African Swine Fever kept the figures from increasing.

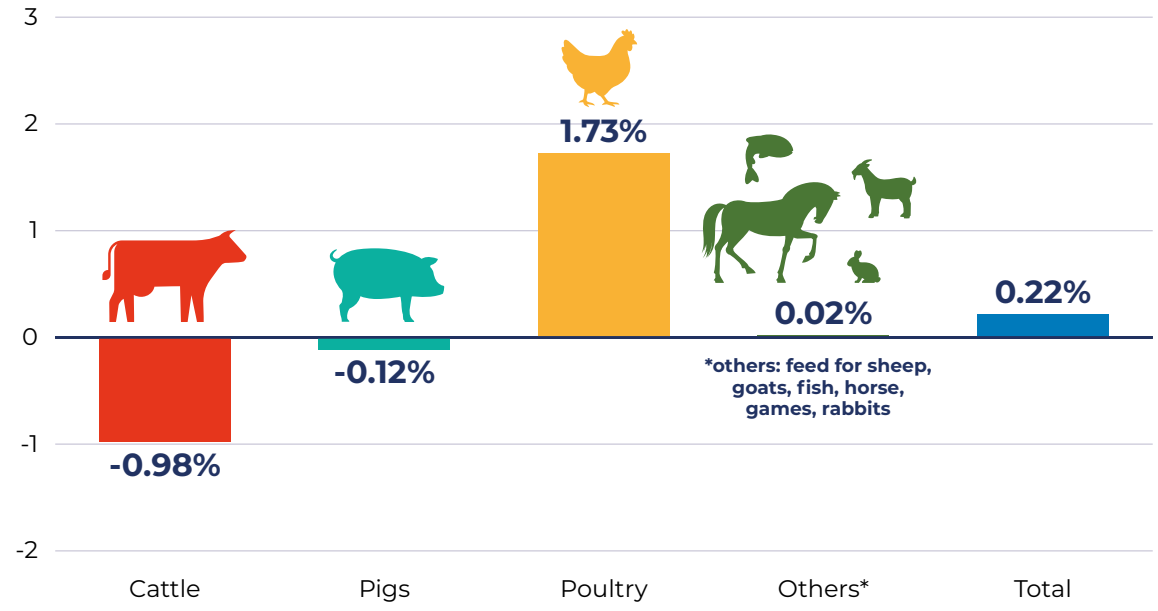
The EU economy faced significant challenges due to the ongoing Russian invasion of Ukraine and the ensuing energy crisis, resulting in heightened inflation and decreased demand for animal products. Apart from that, the ongoing animal deceases crisis all over Europe was also a significant factor for the compound feed production evolution. Nevertheless, the sector is recovering and maintaining a stable production with different fluctuating across the EU.

The majority of the countries managed to either stabilise or increase their feed production levels, though modestly, with Ireland and Denmark showing the most significant increase. Moreover, environmental and animal welfare policies, particularly in the Netherlands (NL), continued to exert pressure on reducing livestock populations. This emphasis on sustainability and animal welfare further influenced feed production dynamics in this and other member states

In 2024, poultry feed production increased due to several factors. Although some countries were heavily impacted by Avian Influenza (AI), such as Portugal (PT), countries such as France (FR) increased their production due to vaccination campaigns, and Spain (ES), Denmark (DK), Ireland (IE), Austria (AT), Poland (PL) and Sweden (SE), had a notable increase in production.

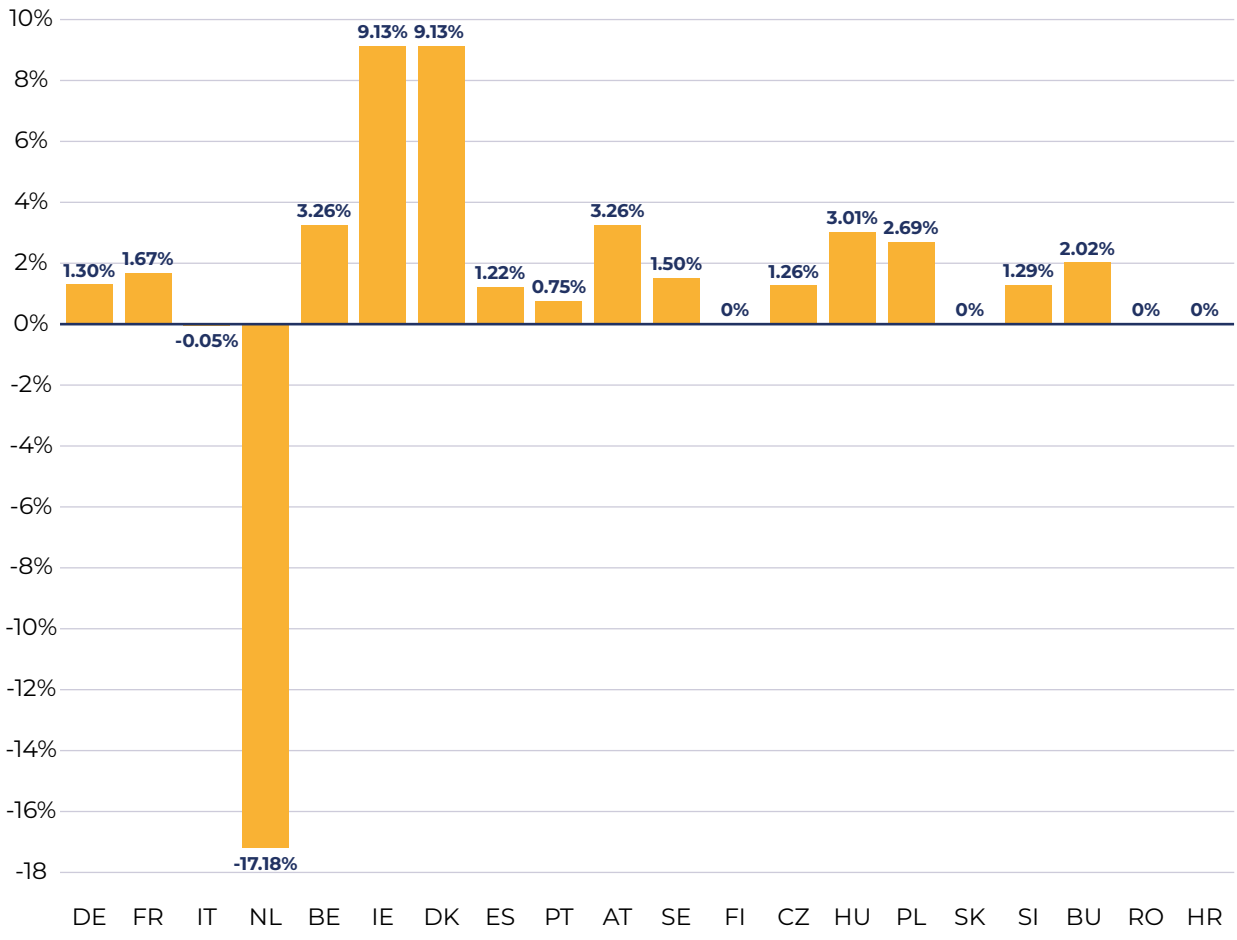
The pig feed sector faced a stabilization in the last two years, witnessing a production only dropping about -0,1% compared to 2023. Several Member States, including, Belgium (BE), Ireland (IE). Denmark (DK), Portugal (PL), Sweden (SE), Hungary (HU) and Poland (PL) experienced production increases exceeding 3%. Nevertheless, the economic downturn and diminishing profitability led to the closure of numerous small farms in certain regions. Pig meat exporting countries are also being impacted from 2025 onwards with anti-dumping duties from China and we will probably see a decline in production in the years to come. African swine fever continued to play a role in certain countries – some regions continue to recover from ASF, affecting the exports of pork meat.

Changes in total compound feed production between 2024 and 2023 per category



Source: *FEFAC*

Changes in total compound feed production between 2024 and 2023 in certain EU countries



Source: *FEFAC*

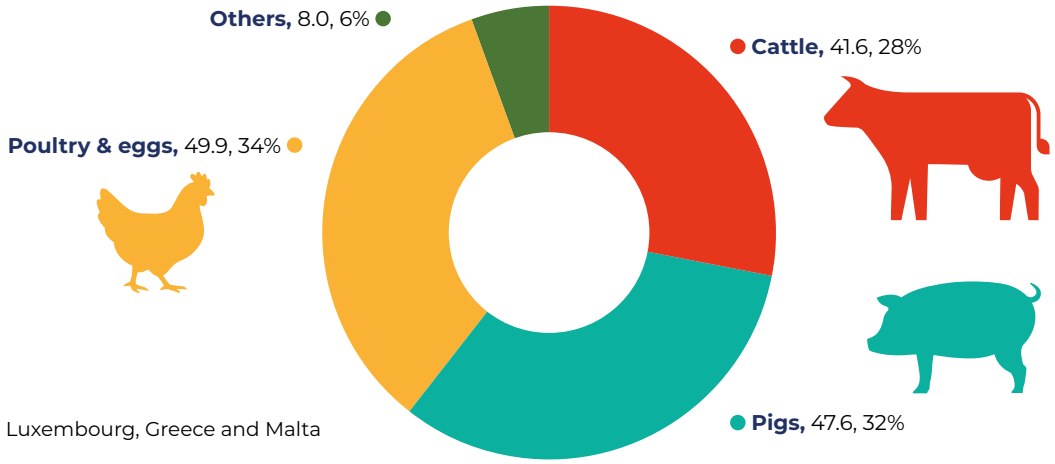
The production of cattle feed slightly decreased by 0.4 million tons compared to the previous year. This slight decrease can be attributed to the stabilization of production levels compared to 2023. Although some good results in France (FR), Ireland (IE), Denmark (DK), Czech (CZ), the regulatory pressure and environmental legislation in countries such as Netherlands (NL) continue to influence the EU average.

Denmark and Ireland were the best-performing country, with an annual growth of +9% for the total compound feed production, boosted by the demand for poultry and cattle compound feed, and pig feed as well in the case of DK.

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 9.4 million tons and 13 million tons respectively, while France maintains its dominance in poultry feed production with 8 million tons

Overall, and continuing the same trend as from 2023, the poultry feed sector now stands out as the largest segment of industrial compound feed production in the EU-27, accounting for 49.9 million tons, followed closely by the pig feed at 47.6 million tons and cattle feed at 41.5 million tons.

Industrial compound feed production in EU* per category in 2024, 147.1 mt.



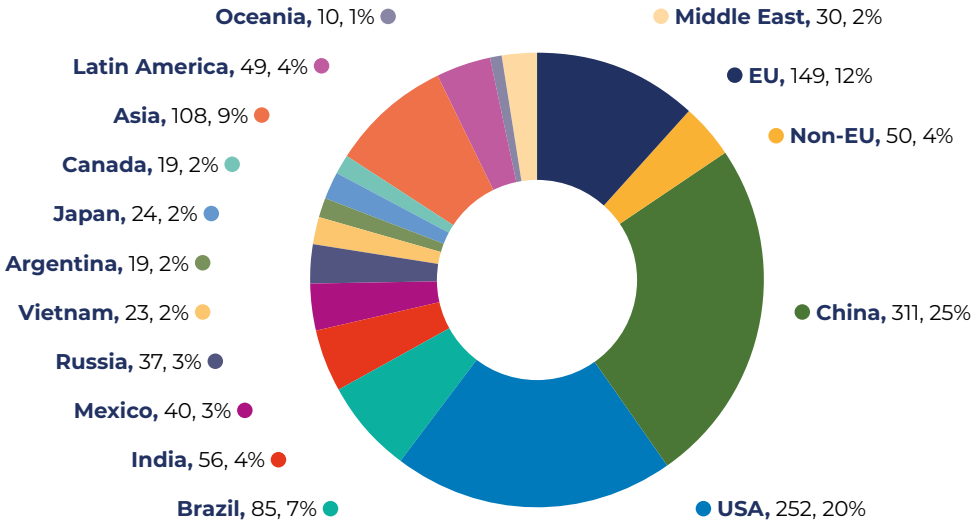
* excl. Luxembourg, Greece and Malta

Source: *FEFAC*

The compound feed industry has undergone a marked shift towards greater capital intensiveness in recent years, reflecting a growing dependence on technological innovation to enhance efficiency and sustainability. Through advanced techniques, feed formulations are increasingly tailored to the specific requirements of livestock farmers, with a particular emphasis on improving environmental performance. These approaches involve strict control over feed material selection, manufacturing operations and the quality of finished products. Within a comprehensive EU and national regulatory framework, the industry complies with robust legislation designed to ensure the high quality and safety of feeds for livestock and for consumers of animal products. The EU27's compound feed output represents about 13% of global industrial feed production, which is estimated at around 1,470 million tonnes.

The EU's global market share has experienced a decline over the past 7 years, primarily attributed to the notable surge in feed production experienced in Asia-Pacific and North America during the same period.

Global compound feed production in 2024 (1260 mt.)



Source: *FEFAC based on Alltech*

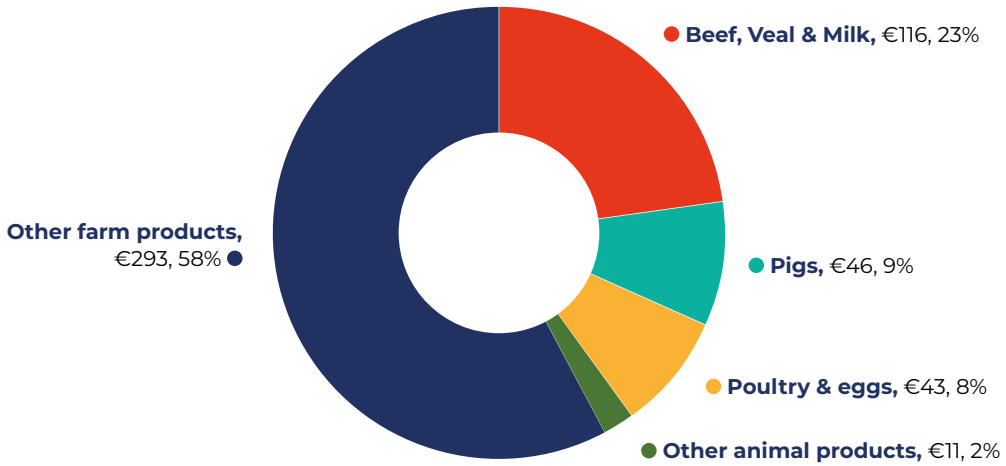
FEEDING EU LIVESTOCK

The livestock sector, valued at €216 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 €116 billion, among livestock products. Following closely are pigs at €46 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 €520 billion in 2024.

Over the past 25 years, feed costs have consistently risen faster than producer prices, underscoring a persistent challenge for livestock farmers seeking to enhance productivity. This pattern reinforces the need for compound feed manufacturers to continuously optimise their operations in order to provide cost-effective solutions.

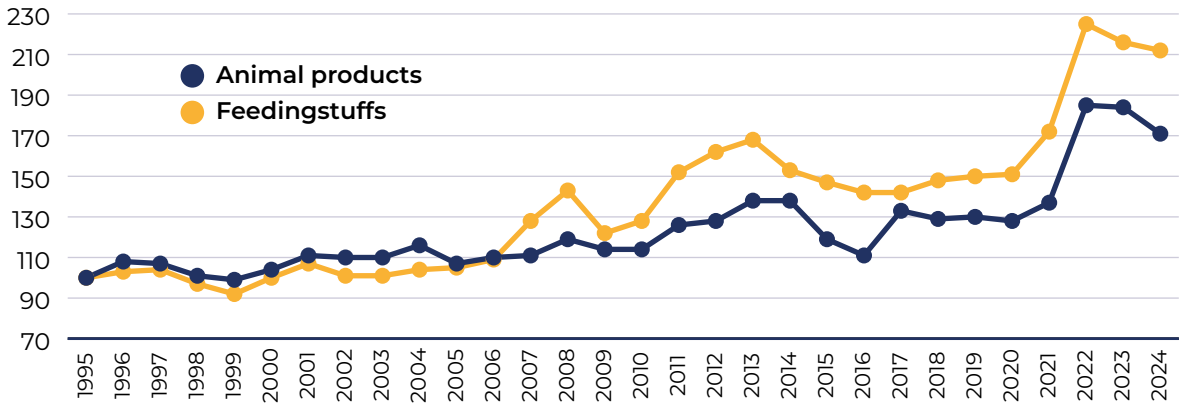
Animal feed stands out as the single most significant cost factor in livestock production. In 2024 up to 45% of the farm gate value of poultry, 31% of the farm gate value of pigs and 12% of the farm gate value of cattle.

Value of farm production in 2024 in the EU (bio. €)



Source: *FEFAC based on Eurostat*

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

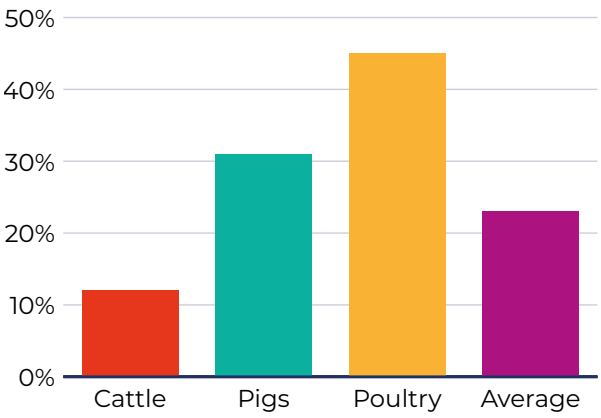


Source: *FEFAC based on Eurostat*

The annual feed consumption of farm animals in the European Union is estimated at about 638 million tonnes, covering all feed materials. Of this total, 398 million tonnes are roughages used directly on farms. The remaining 250 million tonnes consist of feedstuffs such as cereals grown and consumed on the farm of origin, along with feed purchased by livestock producers to supplement their own resources, including both individual feed materials and compound feeds. It is estimated that around 104 million tonnes of feed materials are used directly on farm. In addition, 145.8 million tonnes of compound feed were produced in 2023/2024, representing 23% of the overall feed basket.

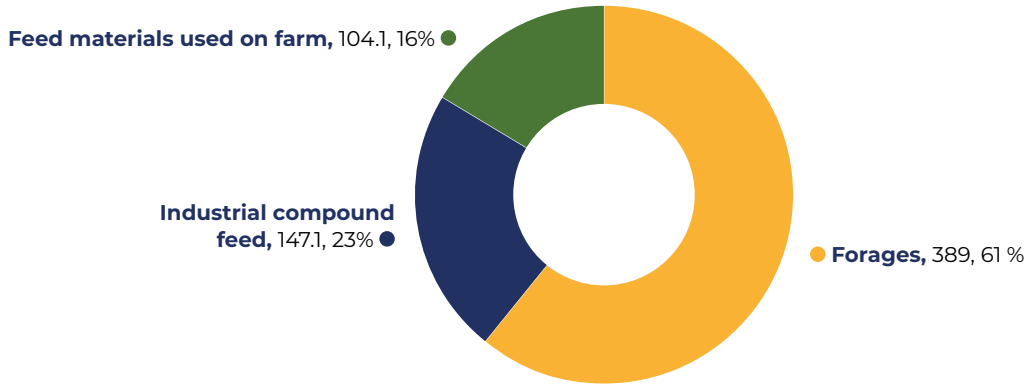
Turnover of the EU-27 industrial compound feed industry was 69 billion euros in 2024.

Value of purchased compound feed in total animal output value in 2024



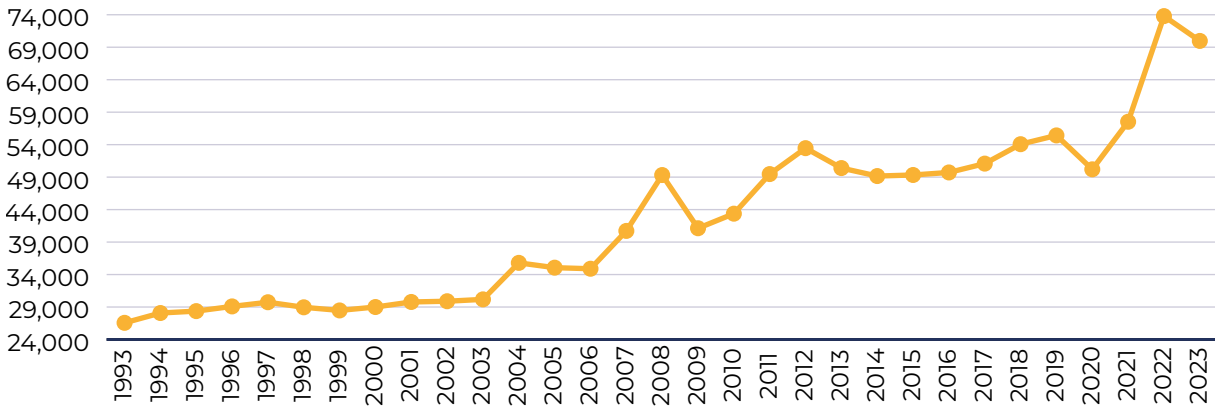
Source: *FEFAC based on Eurostat*

Livestock sourcing in feed in the EU27 (639 mt. in 2023/24)



Source: *FEFAC based on Eurostat*

Turnover of the EU Compound feed industry (million euros)



* EU-15 from 1994, EU-25 from 2004, EU-27 from 2007, EU-28 from 2013, EU-27 from 2020; excl. Luxembourg, Greece and Malta

Source: *FEFAC*

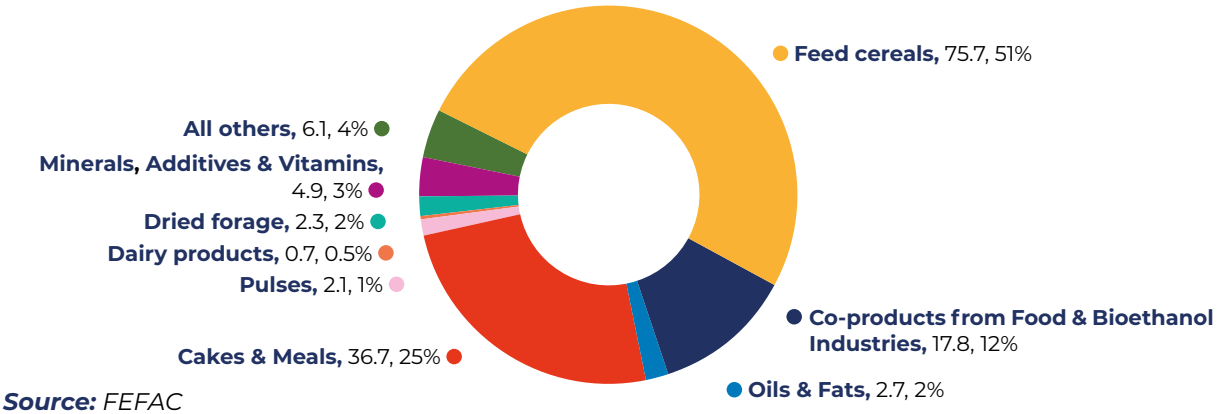
CONSUMPTION OF FEED MATERIALS

The expertise and role of feed formulators are essential for producing feeds that satisfy animals' nutritional requirements and ensure optimal performance. This process entails the efficient selection and combination of a wide variety of feed materials and additives to manufacture compound feeds. Beyond cost considerations, the availability of feed materials remains a crucial factor in feed production. Within the EU, cereals, pulses, and co-products from the food and bioethanol industries represent the main feed material sources. However, some ingredients—particularly protein-rich ones such as soybean meal—are largely imported from third countries due to limited domestic production. Maintaining a diverse supply of feed materials is therefore fundamental to the industry's ability to provide high-quality, competitively priced feeds for livestock producers.

In 2024, the compound feed industry of the EU-27 collectively produced 147 million tons of feed. This contained 75.7 million tons of feed cereals, 36.7 million tons of cakes and meals, 17.8 million tons of co-products from the food and bioethanol industries, 4.9 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 6.1 million tons of various other feed materials such as former foodstuffs, straw, microbial biomass, among others.

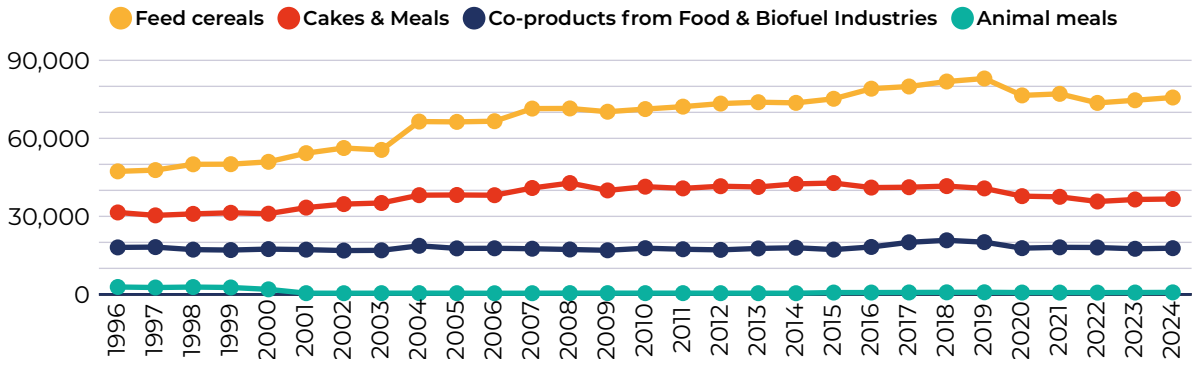
Over the past decade, the share of feed cereals (50.9%) and co-products from the food and bioethanol industries (12%) has remained stable. In contrast, the use of oilseed meals has shown a declining trend, mainly reflecting efforts to further reduce crude protein levels in feeds for farmed animals, as well as in animal meals.

EU-27 Feed material consumption by the compound feed industry in 2024 (147.01 mt.)



Source: *FEFAC*

Development of raw materials consumption by the EU compound feed industry (1,000 t)



Source: *FEFAC*

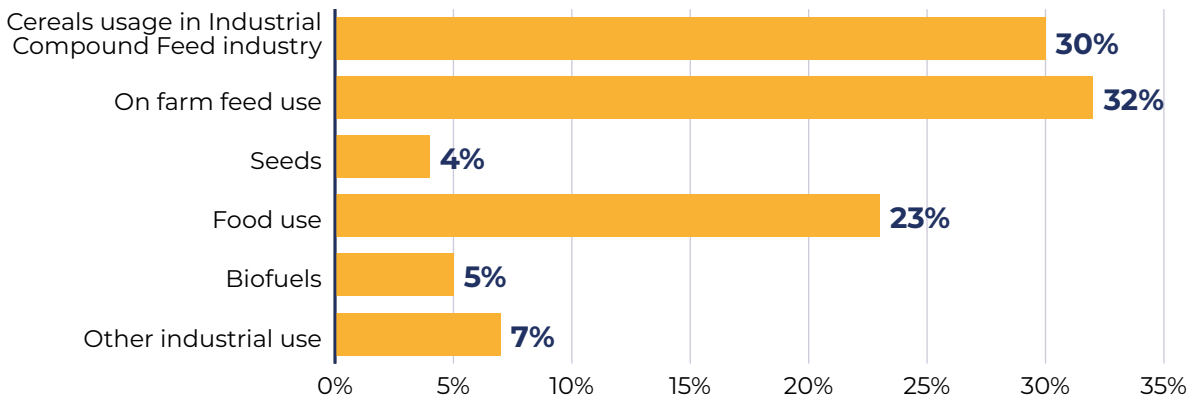
The use of processed animal proteins (PAPs) in compound feed has declined by about 70% over the past two decades, following the BSE crisis and the subsequent EU ban on their use in most species' feed in 2001. Although non-ruminant PAPs and insect meals were reauthorised for use in aquafeeds in 2013 and 2017, respectively, this downward trend has not been reversed. Non-ruminant PAPs represent a locally available feed source that could strengthen the EU's protein self-sufficiency and reduce reliance on imported protein-rich materials. The EU's 2021 decision to allow the use of porcine PAP in poultry feed, avian PAP in pig feed, and insect PAP in both pig and poultry feed marked an important step in this direction. Nonetheless, mainstream uptake within the compound feed sector remains limited. This is largely due to strict technical requirements that confine the use of PAPs to specialised "single-species" feed mills. As of 2022, only a few compound feed manufacturers in the Netherlands have started using these materials in dedicated facilities. Moreover, further authorizations for the use of avian and porcine PAPs are expected soon in Belgium. In Germany, there is moderate but growing interest, though broader adoption across the industry has yet to occur.

Livestock represents the primary market for EU-produced cereals, accounting for 62% of internal usage. Up to 32% of cereals consumed in the EU are directly used by farmers to feed their animals. In addition, 30% of cereals are used by the industrial compound feed industry. The food industry represented 23% of internal usage, followed by industrial use incl. Biofuels (12%) and seeds (4%).

Product of animal origin	Feed for food producing animals					Feed for pets & 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			2021	2013		
Poultry PAP		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*

Internal usage of cereals in the EU-27 in 2023/24



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:

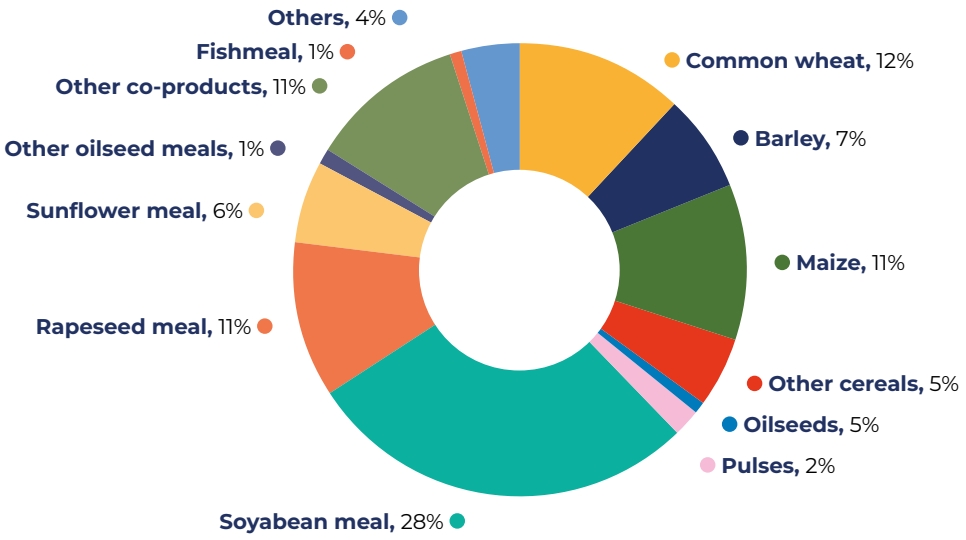
- "Low-pro": less than 15% protein content
- "Medium-pro": 15–30% protein content
- "High-pro": 30–50% protein content
- "Super-pro": over 50% protein content

The European Union displays a high level of dependency concerning imports of high protein feed materials, such as oilseed meals, averaging at 77% 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 development resulted from the expansion of the biofuel industry and the associated production of protein-rich co-products such as rapeseed meal and Dried Distillers' Grains with Solubles (DDGS). However, recent data suggest that this upward trend has plateaued. The stagnation can be linked to several EU countries either discontinuing the use of certain biofuels or lowering blending mandates while redirecting subsidies toward "advanced" biofuels. Additionally, severe climate-related events, including prolonged droughts in Southeastern Europe, have also contributed to this slowdown.

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%.

Sources of proteins for feed use without roughages in the EU27 in 2023/2024

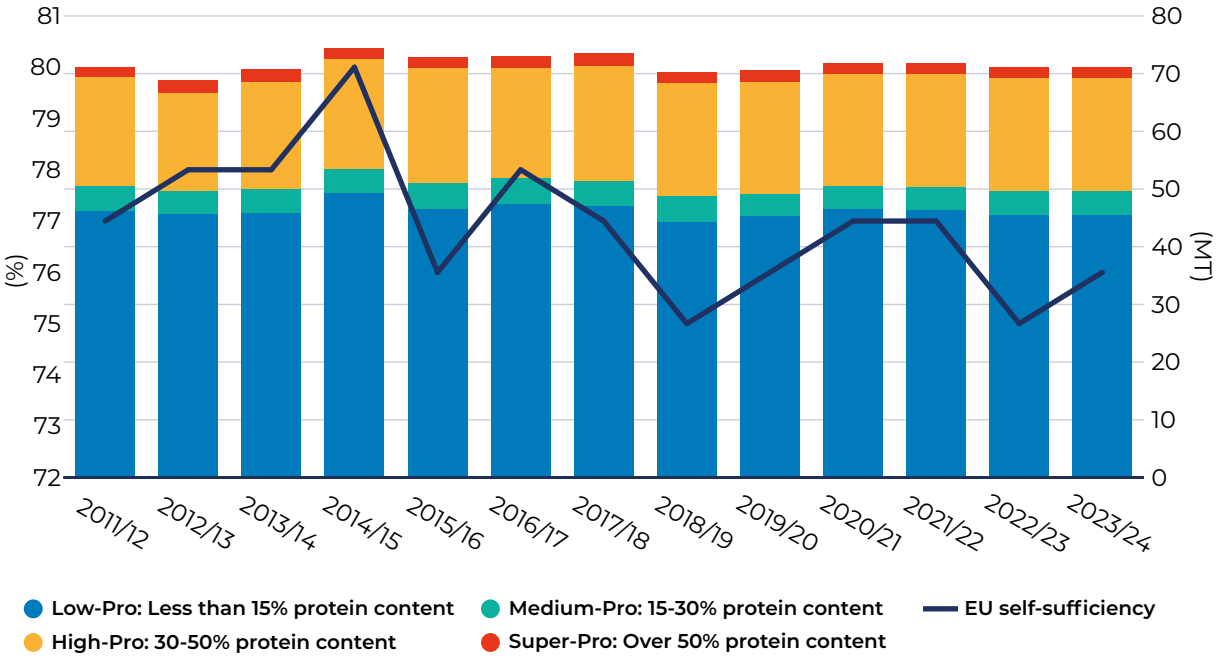


Source: *FEFAC based on EU feed protein balance sheet 2022/23*

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%.

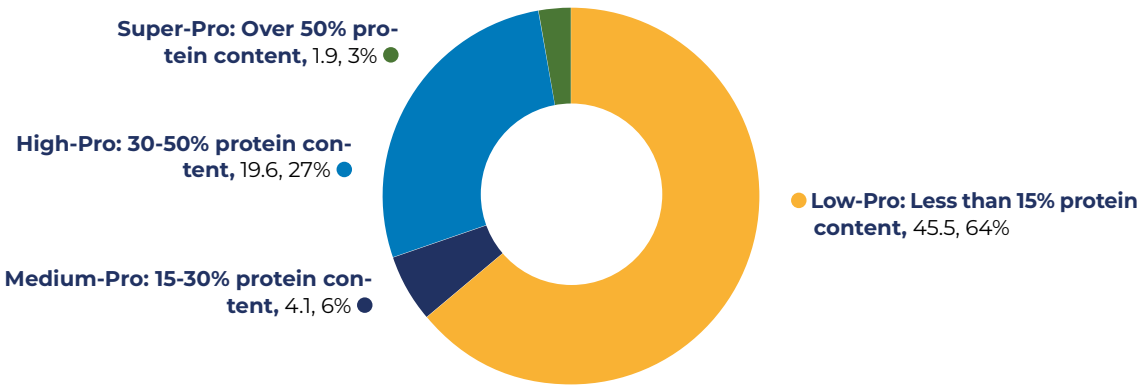
With roughages excluded, up to 46% of the protein supply comes from oilseed meals, 39% mainly from EU-produced cereals and 11% from co-products (i.e. molasses, beet pulp pellets, starch industry protein products, distiller dried grains with soluble etc.).

EU self-sufficiency in protein sources



Source: *FEFAC based on EU feed protein balance sheets*

Imports of feed materials in the EU27 in 2024: 57,7 t (million tonnes)



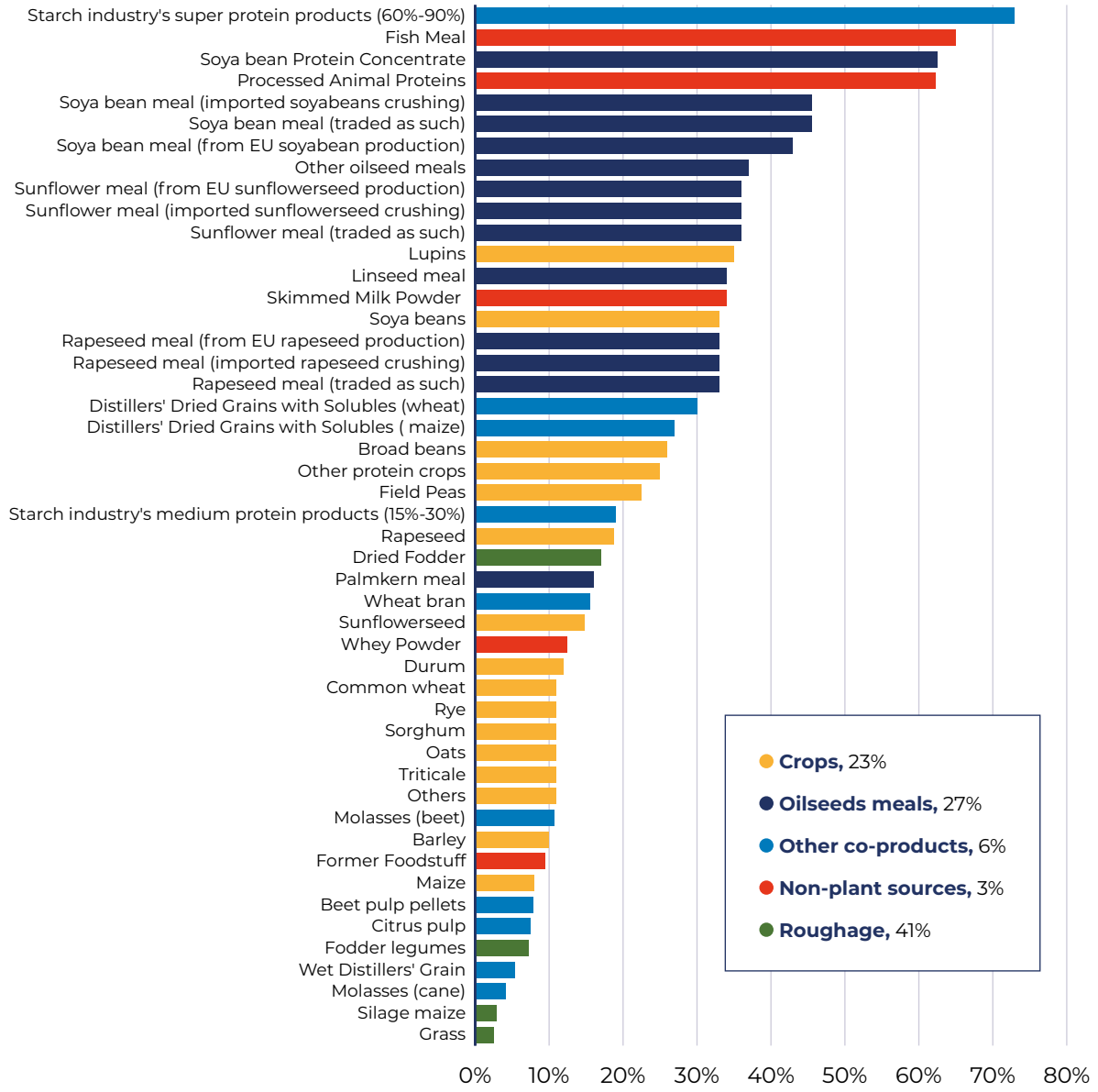
Source: *FEFAC based on EU feed protein balance sheet 2022/23*

The most concentrated protein sources in feed are potato proteins (above 70%) and fish meal (65%). Their overall contribution to protein supply is very small, however, accounting for just 0.7% and 0.4%, respectively. Similarly, although processed animal proteins contain around 62% protein, they represent only 1.3% of total crude protein use. This limited uptake reflects several factors: (1) low market acceptance, (2) stringent regulatory requirements that confine their use to singlespecies feed mills, and (3) issues related to availability and competition between species..

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 favourable amino acid profile.

Oilseed meals collectively contribute significantly to the protein supply, accounting for 46% compared to 11% 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.

EU27 Protein sources 2023/24 (71 MT of crude protein)



Source: *FEFAC based on the EU feed protein balance sheets*

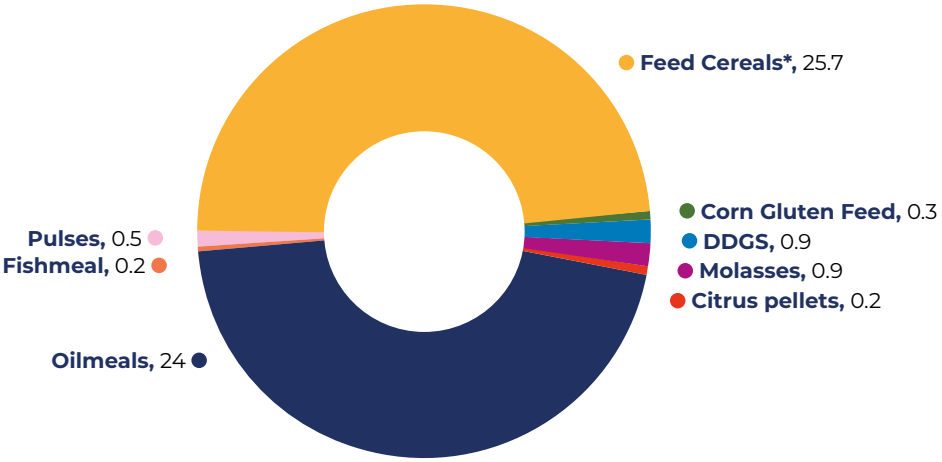
FOCUS ON IMPORT

In 2024, the EU-27 imported a total of 57.4 million tonnes of feed materials. Although oilseeds have traditionally represented the main category of imports, feed cereals accounted for the largest share that year, reaching 25.7 million tonnes. Oilseeds followed closely, with 24 million tonnes imported. Smaller volumes of other feed materials were also sourced, including pulses (0.5 million tonnes), molasses (0.9 million tonnes), DDGS (0.9 million tonnes), corn gluten feed (0.3 million tonnes), citrus pellets (0.2 million tonnes), and fishmeal (0.2 million tonnes).

The European Union is mostly dependent (76%) 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%).

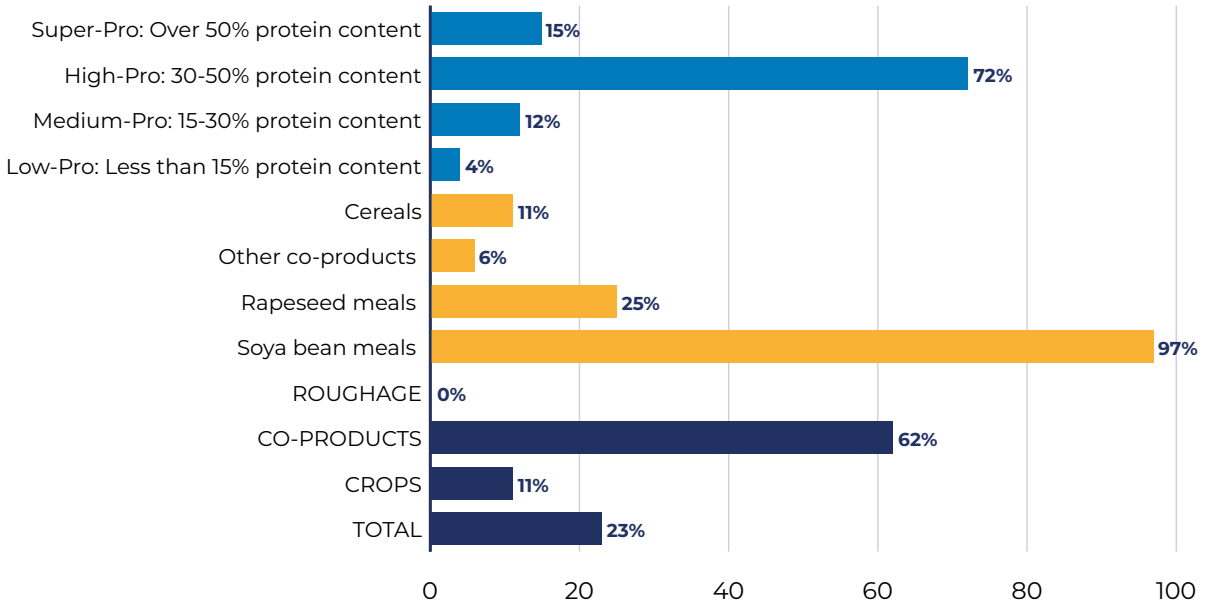
This is due to the EU biofuel policies like the Renewable Energy Directive (RED) of 2009, which incentivised biofuel production and therefore boosted rapeseed meal output. Overall, the EU maintains a moderately low dependency on total feed proteins (24%), with 76% of total feed proteins being locally 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%).

Imports of feed materials in the EU27 in 2024: 57,7 t



Source: *FEFAC based on Eurostat*

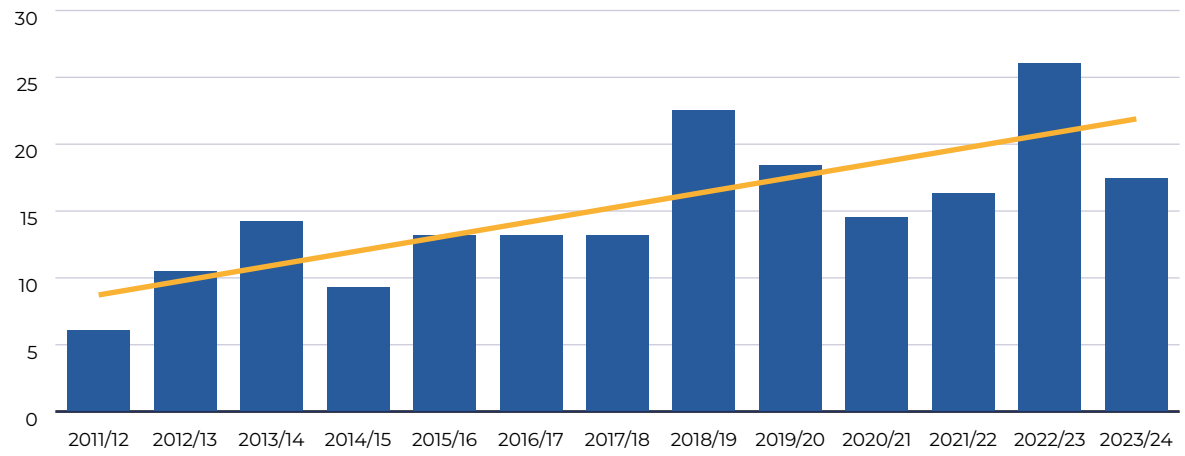
% feed use of foreign origin (10 years average)



Source: *FEFAC based on DG AGRI data*

For many years, the EU feed industry has covered more than 90% of its cereal requirements from local sources. However, as illustrated in the graph below, there is a clear upward trend in maize imports, indicating a potential increase in dependency in this segment, particularly given the rising flow of maize imports from the United States to Spain, Portugal, and Ireland.

Import of maize in the EU27 (million tonnes)

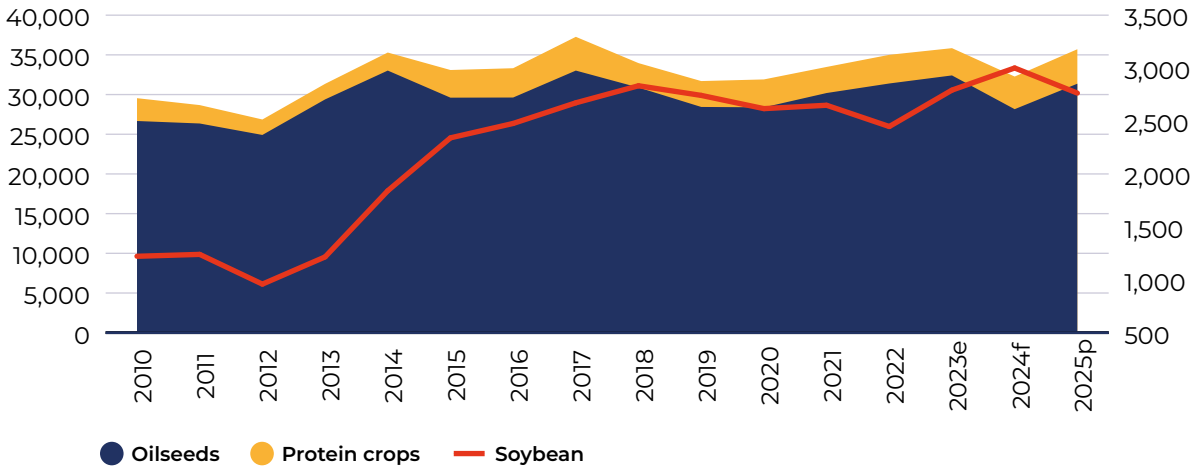


Source: *FEFAC based on EU feed protein* balance sheets

FOCUS ON SOY

In 2018, the European Commission released a report on the development of plant proteins in the European Union, underscoring the sector's dynamic growth in recent years. Over the past decade, EU oilseed production has levelled off, registering an overall increase of 10%, whereas protein crops have expanded markedly, with a 75% rise over the same period. Soybeans have been the most successful domestically grown oilseed, with production more than tripling since 2013, from 0.96 million tonnes to 3 million tonnes in 2024. Field peas have also recorded significant progress among protein crops, with production increasing by 62% over the last ten years.

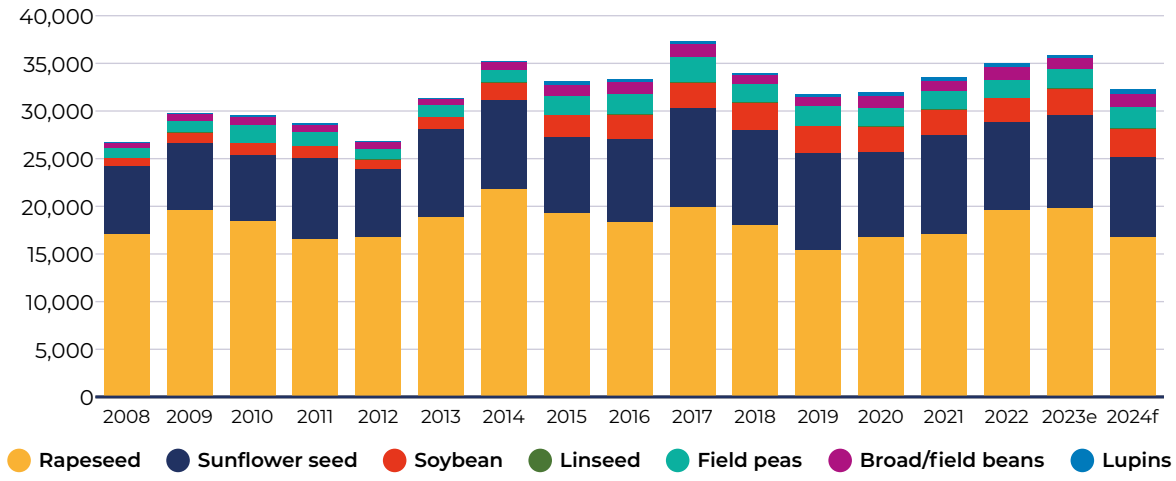
EU27 production of plant proteins (1,000 t)



e = estimation, f = forecast, p = prediction

Source: *FEFAC based on DG AGRI's data*

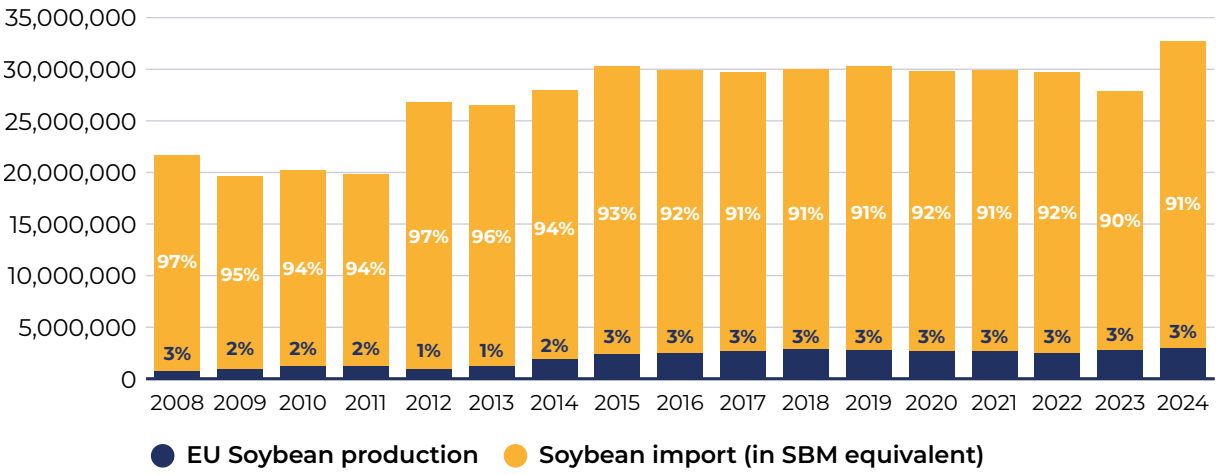
EU-27: production by selected crops (thousand tonnes)



e = estimation, f = forecast

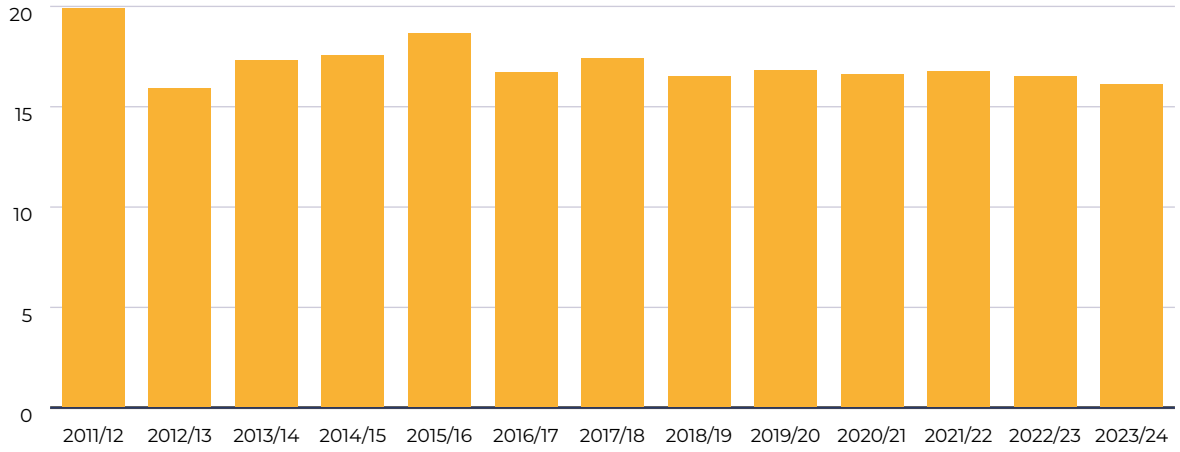
Source: *FEFAC based on DG AGRI's data*

EU27 soy production and import % of soy origin available to EU27 (before export)



Source: *FEFAC based on DG AGRI's data*

Import of SBM in the EU27 (million tonnes)

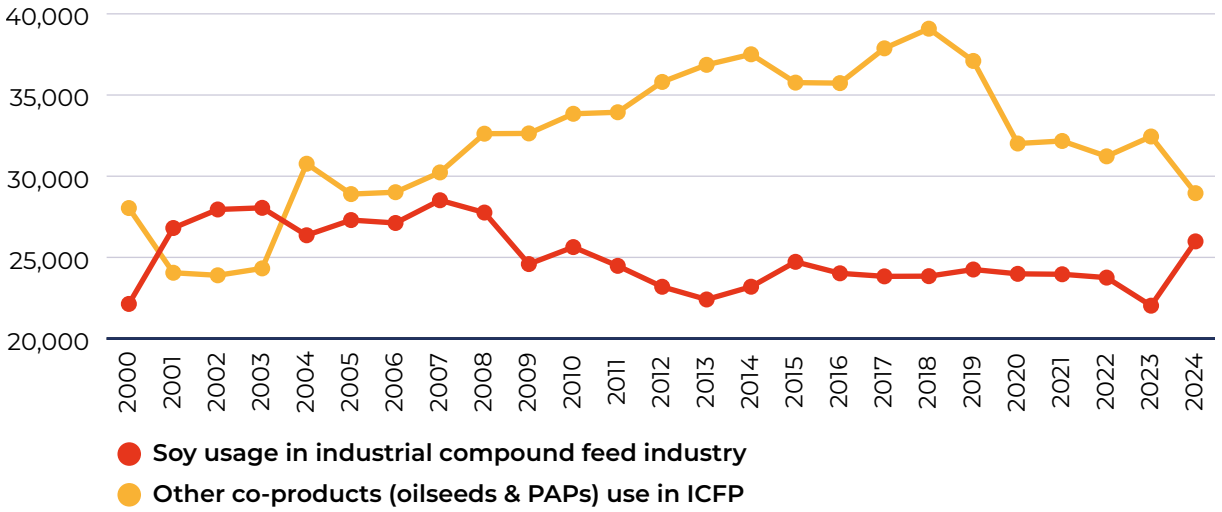


Source: *FEFAC based on DG AGRI's data*

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).

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 compared to the use of other co-products (1000 tons, EU-27)

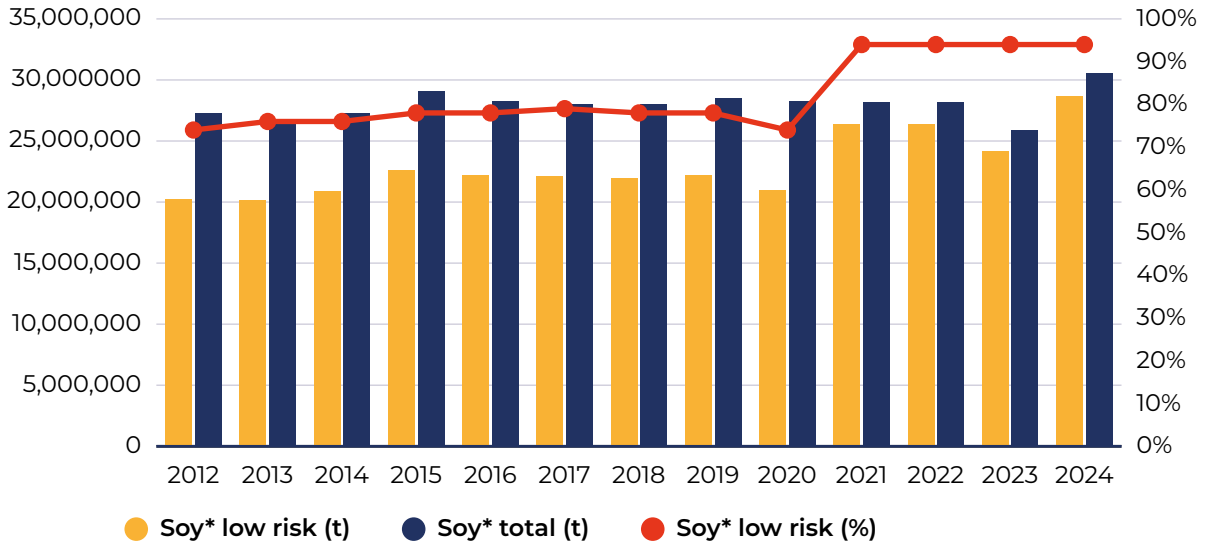


Source: *FEFAC based on its own and Eurostat*

In 2024 the EU imported 30 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).

This means that around 28 million tons of soy (in soybean meals equivalent) was sourced from negligible deforestation-risk areas (out of 30 million tons of soy).

Soy import / Share of Low Risk Conversion free Soy to EU-27



* in soybean meals equivalent

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

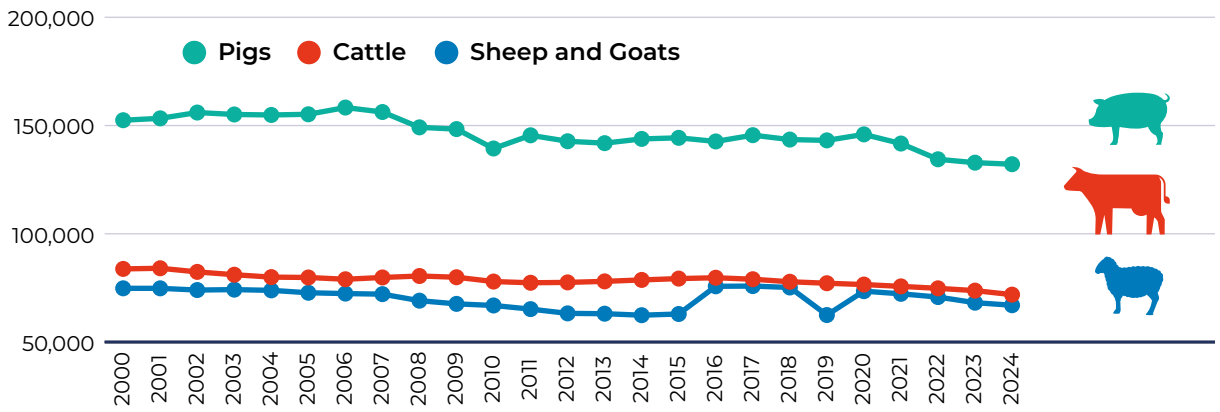
FOOD

The demand for animal feed is closely connected with the demand for livestock products. In 2024, the EU-27 experienced a further decline in its livestock population. Cattle numbers decreased by 2.5%, pigs by 0.5%, and sheep and goats by 1.7% compared to the previous year.

In 2024, meat production in the EU-27 experienced an increase of 3,6%, totalling 44.3 million tons compared to the previous year. This increase was primarily driven by a recovery across various categories: pig meat production increased by 2.2% to 21 million tons, poultry meat increased by 6.5% (14 million tons), sheep and goat production increased by 4.5% and beef & veal increased by 3% to 6.6 million tons.

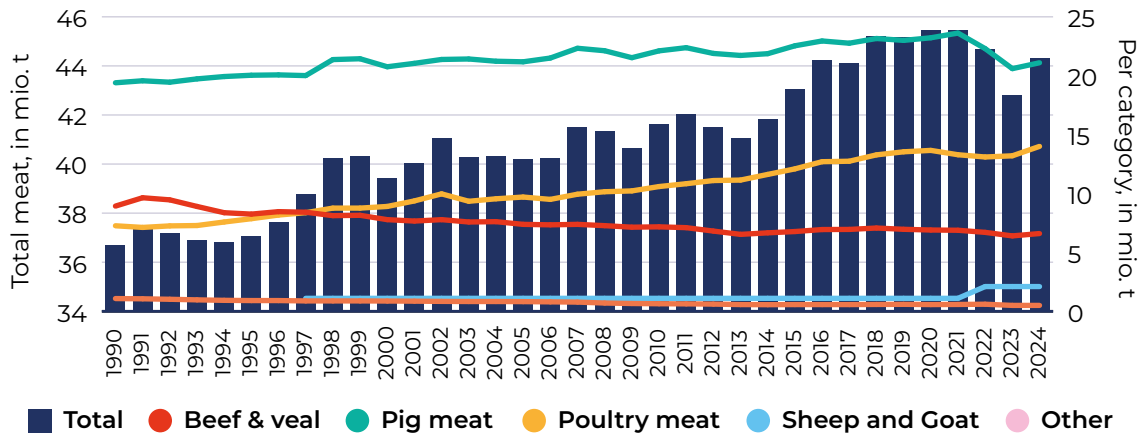
In terms of meat shares, pig meat dominates EU-27 production, comprising 47%. Poultry meat follows closely behind with a 32% share, trailed by beef and veal at 15%, with sheep and goat meat accounting for the remaining 1%.

Evolution of EU-27 livestock population (1,000 heads)



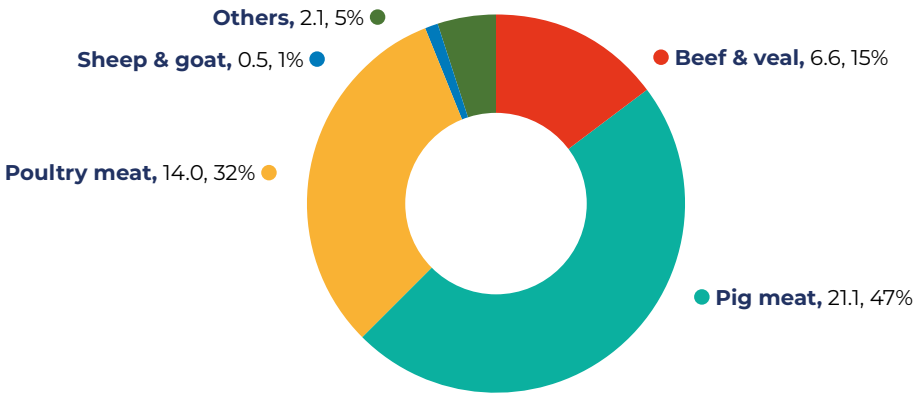
Source: *FEFAC based on DG AGRI's data*

Gross meat production development in the EU-27 per category



Source: *FEFAC based on DG AGRI's data*

Breakdown of meat production per livestock class in the EU-27 (2024)

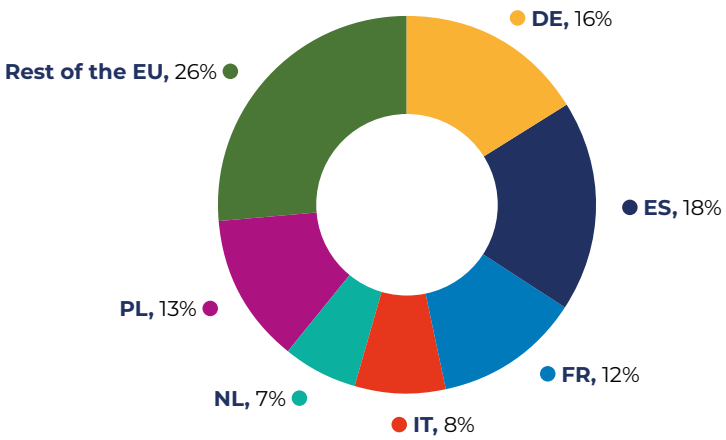


Source: *FEFAC based on DG AGRI's data*

Spain has emerged since 2022 as a dominant force in meat production within the EU-27, achieving an important milestone by securing a market share of 18% and boasting a total production of 7.5 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 (6.86 million tons) in 2024. Following Spain and Germany, Poland claims the third position with an 13% share of the market, yielding 5.4 million tons, while France secures fourth position with an equivalent 12% share, producing 5.1 million tons. Italy, contributing 3.3 million tons to the overall production, holds an 8% market share, alongside the Netherlands with 7% market of the market share producing 2.6 million tons, within the EU-27. The collective contribution of the remaining countries constitutes 26% of the market, with a production totalling 11 million tons.

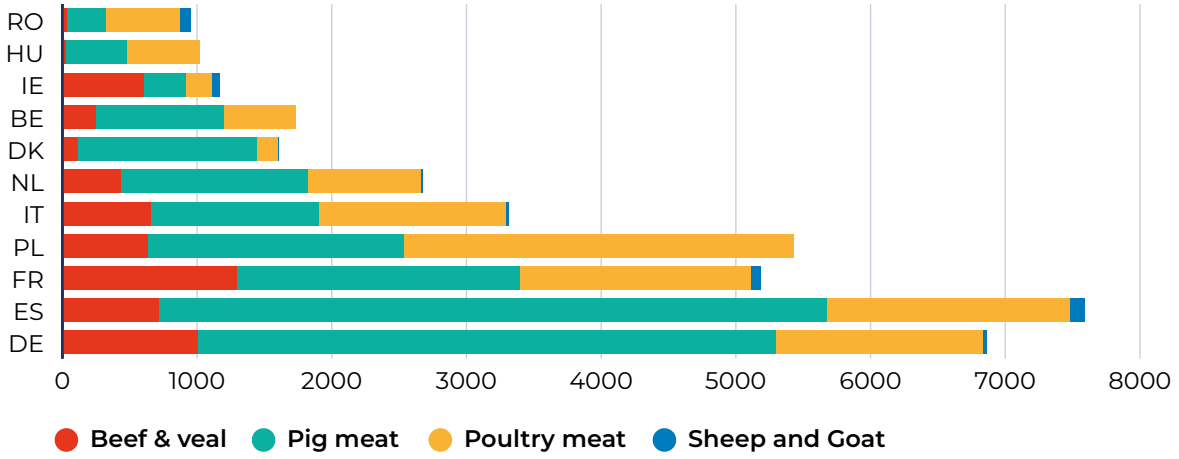
In 2024, Spain led the EU-27 in pig meat production, yielding 4.9 million tons, followed closely by Germany with 4.2 million tons. France maintained its third position with 2 million tons, trailed by Poland at 1.90 million tons and Netherlands at 1.3 million tons. Poland emerged as the largest producer of

Leading meat producing countries in the EU-27 (2024)



Source: *FEFAC based on DG AGRI's data*

Leading meat producing countries per category in the EU-27 (2024, 1,000 t)

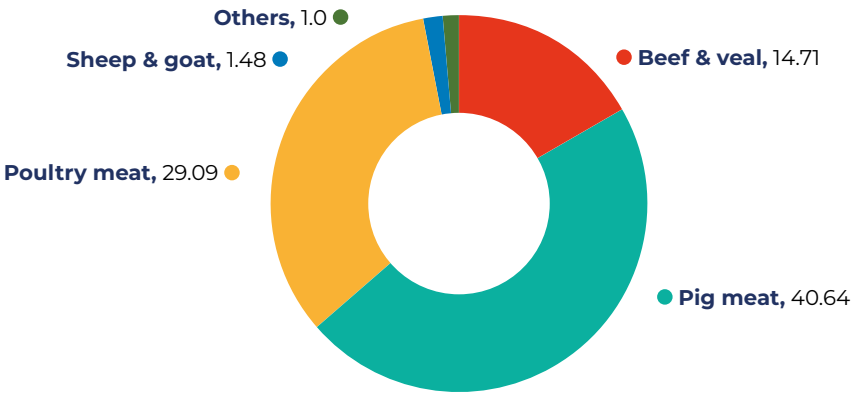


Source: *FEFAC based on DG AGRI's data*

poultry meat, boasting 2.89 million tons, with Spain following at 1.80 million tons. France and Germany closely trailed with 1.70 million tons and 1.53 million tons respectively, while Italy produced 1.38 million tons. France secured the top spot in beef and veal meat production within the EU-27, contributing 1.30 million tons. Germany followed with 1 million tons, and Spain with 0.71 million tons. Italy and Poland rounded out the top five, producing 0.63 million tons and 0.65 million tons respectively. Spain also dominated in sheep and goat meat production, generating 0.1 million tons.

Pig meat is the most consumed meat in the EU-27, with 40.6 kg/capita/year in 2023, followed by poultry meat with 29.0 kg/capita/year, 14.7 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) 2024*



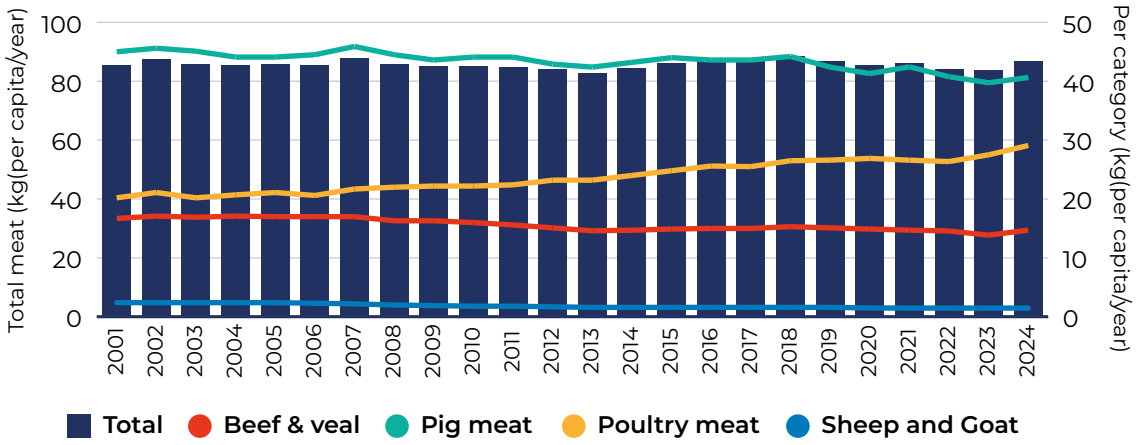
* forecast

Source: *FEFAC based on DG AGRI's data*

The average per capita consumption of total meat (including horse meat, rabbits and offals) in 2024 was at 86.9 kg, which was 4% more compared to the previous year – 83.5 kg. The consumption of beef and veal, poultry meat and pig meat all had an increase in comparison with the figures from 2023, with the biggest impact in poultry meat – 6% more in comparison to 2023.

The EU is largely self-sufficient in livestock products, particularly pig meat, poultry meat and dairy products. Despite challenges such as the COVID19 pandemic, rising geopolitical tensions, trade disputes and animal diseases, the EU27 has maintained its position as the world's leading exporter of agricultural and food products. However, the EU27 continues to show structural deficits in the production of sheep and goat meat, as well as oilseed meals.

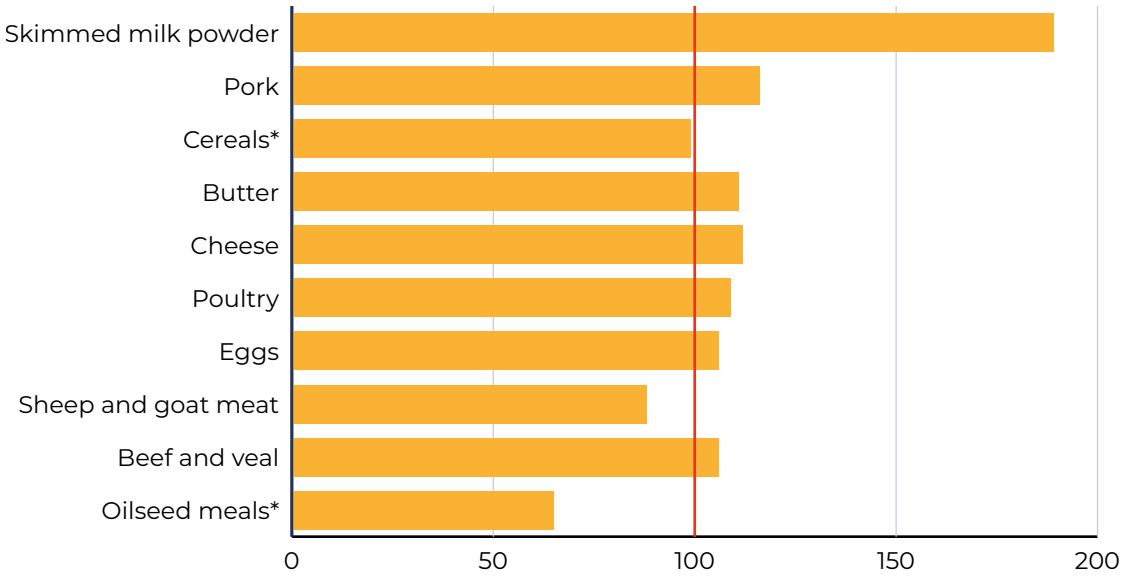
Meat consumption development in the EU27 per category (kg/per capita/year) 2024*



* forecast

Source: *FEFAC based on DG AGRI's data*

EU27 self-sufficiency for some EU agricultural products in 2024 (in %)



* MY

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	2024	%TAV	2023	2024	%TAV	2023	2024	%TAV	2023	2024	%TAV
DE	6,477	6,508	0.5	8,043	8,257	2.7	6,268	6,335	1.1	21,500	21,780	1.3
FR	5,356	5,481	2.3	4,296	4,249	-1.1	7,799	8,055	3.3	19,393	19,717	1.7
IT	3,731	3,760	0.8	3,960	3,930	-0.8	6,137	6,090	-0.8	14,898	14,891	0.0
NL	4,311	3,221	-25.3	4,349	3,089	-29.0	4,056	3,997	-1.5	13,827	11,452	-17.2
BE	1,434	1,443	0.6	3,023	3,147	4.1	1,260	1,286	2.1	6,143	6,343	3.3
IE	3,466	3,866	11.5	663	686	3.5	690	711	3.0	5,028	5,487	9
DK	1,018	1,148	12.8	2,088	2,289	9.6	644	698	8.4	3,976	4,339	9.1
ES**	9,666	9,400	-2.8	12,907	13,100	1.5	4,803	5,200	8.3	27,535	27,870	1.2
PT	1,106	1,184	7.1	1,100	1,199	9.0	1,905	1,776	-6.8	4,427	4,460	0.7
AT	632	661	4.6	250	249	-0.6	707	734	3.8	1,734	1,791	3.3
SE	861	832	-3.4	306	338	10.5	685	715	4.4	1,927	1,956	1.5
FI	673	673	0.0	231	231	0.0	420	420	0.0	1,434	1,434	0.0
CY	180	180	0.0	5	5	0.0	37	37	0.0	359	359	0.0
CZ	596	609	2.2	675	673	-0.3	1,006	1,026	2.0	2,378	2,408	1.3
EE	40	40	0.0	140	140	0.0	48	48	0.0	230	230	0.0
HU	461	472	2.4	1,262	1,350	7.0	1,820	1,835	0.8	3,649	3,759	3.0
LV	64	64	0.0	66	66	0.0	202	202	0.0	346	346	0.0
LT	58	76	31.0	19	35	84.2	217	321	47.9	480	617	28.5
PL	1,170	1,280	9.4	2,370	2,630	11.0	7,190	7,270	1.1	11,530	11,840	2.7
SK	196	196	0.0	195	195	0.0	268	268	0.0	679	679	0.0
SI	89	93	4.4	46	44	-2.8	261	261	0.0	399	404	1.3
BU	202	190	-5.9	444	477	7.4	632	621	-1.7	1,338	1,365	2.0
RO	90	90	0.0	980	980	0.0	1,695	1,695	0.0	2,905	2,905	0.0
HR	95	95	0.0	260	260	0.0	300	300	0.0	670	670	0.0
EUR 27*	41,972	41,562	-1.0	47,677	47,619	-0.1	49,050	49,901	1.7	146,785	147,101	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 (1,000 t)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total	151.36	151.75	153.37	155.27	158.27	161.35	164.91	164.73	150.60	151.85	147.23	146.91	147.10
Cattle	41.5	42.36	42.68	42.43	43.58	45.52	48.11	47.69	42.42	42.31	41.70	42.08	41.56
Pigs	49.8	49.21	49.86	50.59	50.81	51.43	51.49	51.73	51.31	52.55	49.75	47.70	47.62
Poultry	51.4	51.41	51.99	53.01	54.94	55.08	55.71	56.01	48.92	48.87	47.84	49.05	49.90

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

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Turnover	43,372	49,470	53,460	50,395	49165	49,329	49,719	51,080	54,070	55,421	50,200	57,526	73,791	69,970

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

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total	151,364	151,750	153,372	155,268	158,270	161,351	164,909	164,726	150,596	151,613	145,795	147,227	148,957
Feed cereals	73,368	73,898	73,648	75,215	79,097	79,938	81,852	83,011	76515	77,113	73,630	74,646	75,705
Tapioca	0	22	2	4	0	0	0	0	0	0			
Co-products from Food & Bioethanol Industries	17,108	17,665	17,928	17,224	18,232	20,025	20,790	20,080	17775	18,089	18,025	17,525	17,763
Oils & Fats	2,568	2,579	2,852	3,005	2,726	2,796	2,856	2,806	2545	2,640	2,621	2,657	2,691
Cakes & Meals	41,590	41,307	42,487	42,813	41,068	41,204	41,632	40,753	37772	37,513	35,714	36,485	36,681
Animal meals	459	455	441	698	698	736	780	800	697	692	672	707	765
Dairy products	1,248	1,229	1,237	963	713	713	713	714	727	727	677	687	687
Dried forage	2,075	2,055	2,315	2,108	2,121	2,110	2,178	2,232	2306	2,336	2,254	2,295	2,272
Pulses	1,759	2,071	1,915	1,983	2,230	2,228	2,300	2,161	2026	2,069	2,071	2,070	2,079
Minerals, Additives & Vitamins	4,408	4,342	4,714	4,924	5,337	5,529	5,647	5,603	5083	4,957	4,684	4,819	4,856
All others	6,781	6,127	5,833	6,330	6,049	6,070	6,162	6,566	5148	5,477	5,448	5,334	5,456

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

Raw material	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Soybeans	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	13,992,271
Soybean meal	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	14,014,352	17,463,337
Soy* low risk (t)	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	24,190,839	28,657,154
Soy* low risk (%)	76%	78%	78%	79%	78%	78%	74%	94%	94%	94%	94%
* in soybean meals equivalent											

Full members

VFÖ (Austria)

BFA (Belgium)

BFMA (Bulgaria)

CAFM (Cyprus)

SKK (Czech Republic)

DAKOFO (Denmark)

FFDIF (Finland)

EUROFAC (France)

DVT (Germany)

SEVIZ (Greece)

HGFA (Hungary)

IGFA (Ireland)

ASSALZOO (Italy)

LGPA (Lithuania)

NEVEDI (Netherlands)

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