FEFAC
Experts in Animal Nutrition

FEFAC RECOMMENDATIONS TO THE

EU LIVESTOCK STRATEGY & EU PROTEIN PLAN

2026



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EXECUTIVE SUMMARY

The following public recommendations are building on FEFAC's earlier contributions to the **EU "Vision for Agriculture and Food"** shared at the EBAF level and during the launch of the EU Livestock Workstream initiative.

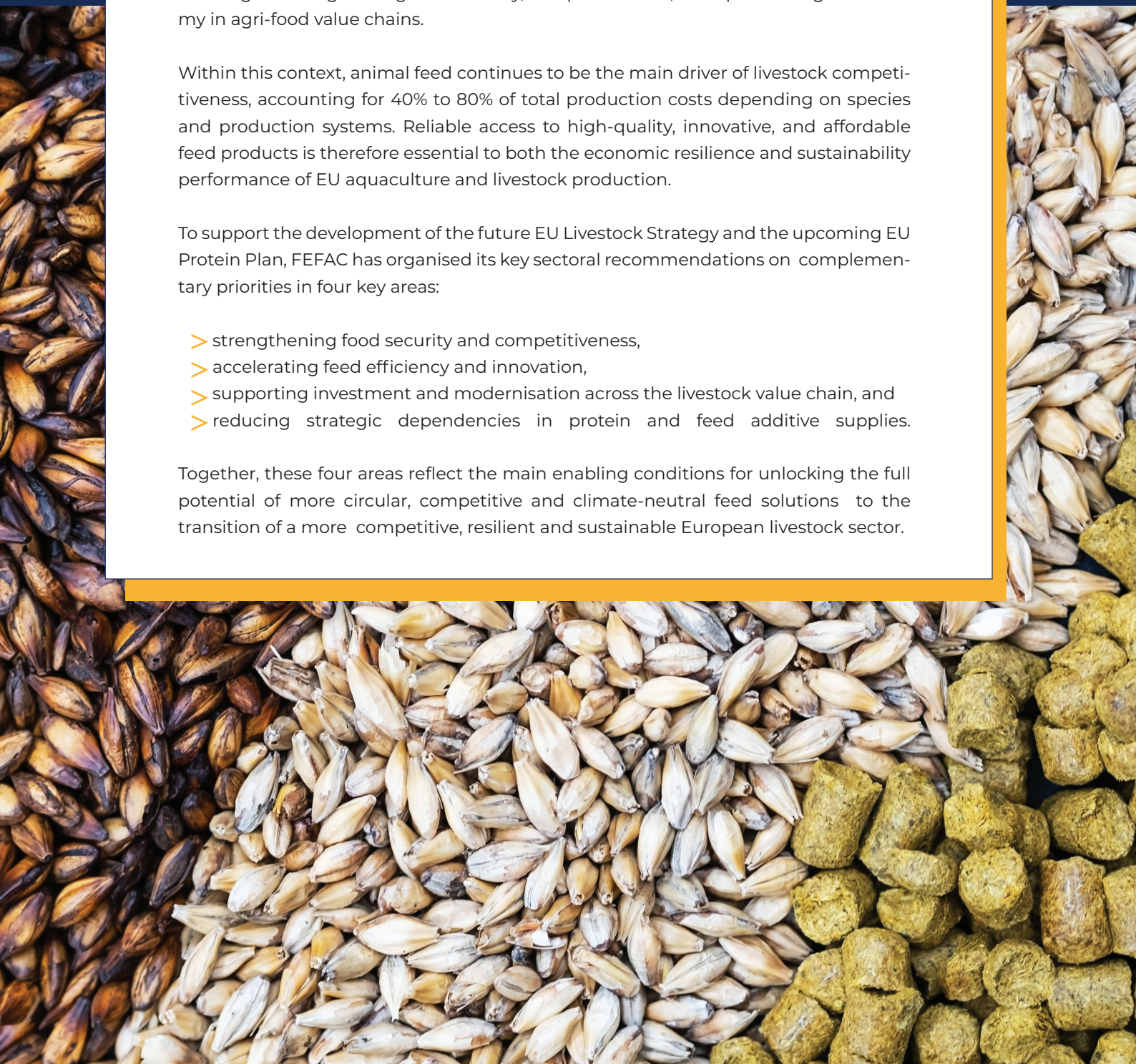
They are presented at a time when EU livestock and feed markets are still adjusting to recent global disruptions, with trade flows for essential feed supply chains facing high pressure and uncertainties. At the same time, EU policy priorities are increasingly focusing on strengthening food security, competitiveness, and open strategic autonomy in agri-food value chains.

Within this context, animal feed continues to be the main driver of livestock competitiveness, accounting for 40% to 80% of total production costs depending on species and production systems. Reliable access to high-quality, innovative, and affordable feed products is therefore essential to both the economic resilience and sustainability performance of EU aquaculture and livestock production.

To support the development of the future EU Livestock Strategy and the upcoming EU Protein Plan, FEFAC has organised its key sectoral recommendations on complementary priorities in four key areas:

- strengthening food security and competitiveness,
- accelerating feed efficiency and innovation,
- supporting investment and modernisation across the livestock value chain, and
- reducing strategic dependencies in protein and feed additive supplies.

Together, these four areas reflect the main enabling conditions for unlocking the full potential of more circular, competitive and climate-neutral feed solutions to the transition of a more competitive, resilient and sustainable European livestock sector.



FOOD SECURITY AND COMPETITIVENESS

The EU livestock sector is a cornerstone of European food security, rural economic vitality and the circular bioeconomy. It provides nutritious, safe and affordable animal-source food to approx 450 million EU consumers, while sustaining millions of livelihoods across the rural economy and contributing indispensable ecosystem services. Yet the sector's long-term competitiveness is increasingly compromised by structural bottlenecks, regulatory fragmentation, inadequate infrastructure, and lack of investment. The EU Livestock Strategy must address these systemic constraints with ambition and coherence.

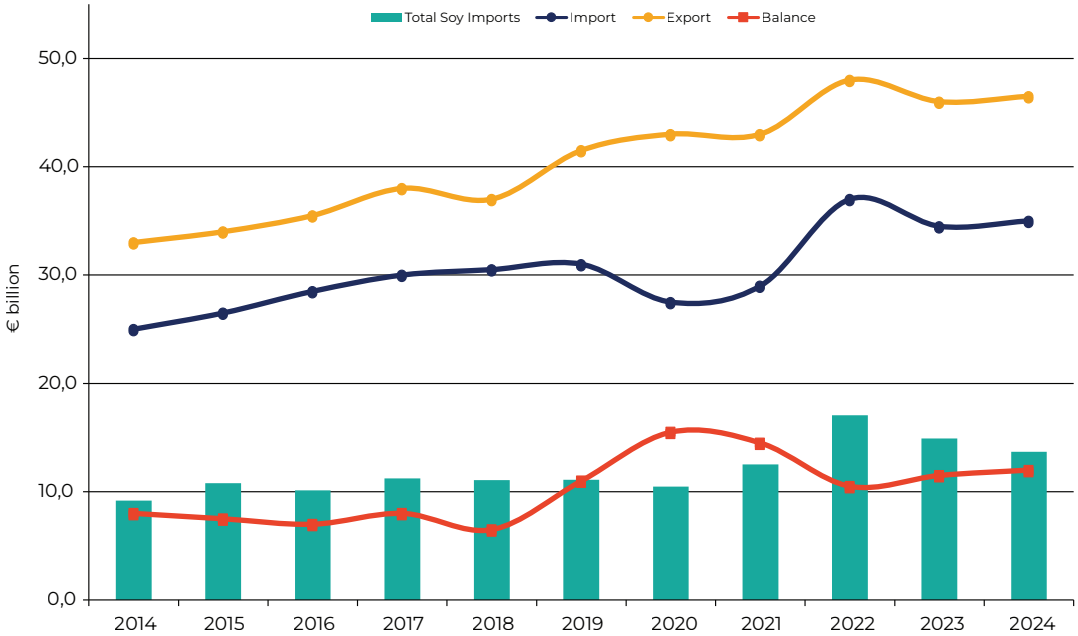
- Harmonise the enforcement of the EU legislation across Member States to reduce fragmentation and prevent intra-EU trade distortions. Ensure robust, evidence-based impact assessments linked to EUDR implementation and pesticide residues policy to avoid trade disruptions that may compromise feed&food security and additional administrative and costs for the EU feed and livestock sector.

- Implement balanced trade agreements & based on SPS/TBT equivalence frameworks and mutual recognition of private sector guidelines and standards, facilitating trade diversification while ensuring level playing field conditions based on harmonised EU safety, environment and welfare standards.

- Integrate feed supply chain security into the EU Stockpiling Strategy and future EU Contingency Plan for crisis preparedness. Recurrent geopolitical shocks and the growing concentration of global supply chains for key feed commodities and essential feed additives expose the EU livestock sector to significant resilience risks. Strategic targeted investment in effective mitigation measures, including diversified sourcing, stockpiling mechanisms, investment in new technologies and contingency planning for critical feed ingredients, must form an explicit component of the EU's broader food security architecture.

- Prioritise investment in feed transport, storage and processing infrastructure as an essential enabler of a competitive and resilient EU protein supply chain. Beyond primary production, the efficiency of logistics capacity to store, process and distribute feed ingredients in the EU is crucial to reduce the competitiveness gap with other global feed and livestock value chains. Public investment and CAP support should be directed at closing infrastructure gaps, particularly for domestically grown protein crops, to reduce the sector's structural dependence on long-distance imports.

EU trade in animal products & soy imports, 2014 - 2024 (€ billion)



Source: FEFAC

FEED EFFICIENCY, PRECISION FEEDING

Feed is the single largest cost in livestock production and the key lever for both economic and environmental performance. Precision feeding and feed innovation are essential for a competitive European livestock system. The Strategy must place feed innovation at the centre of the EU's livestock transition agenda.

- Accelerate the large-scale deployment of precision feeding across all livestock systems, supported by the use of sensor data and real-time indicators to customise diets according to animal health status, genetic potential, age, and production stage.

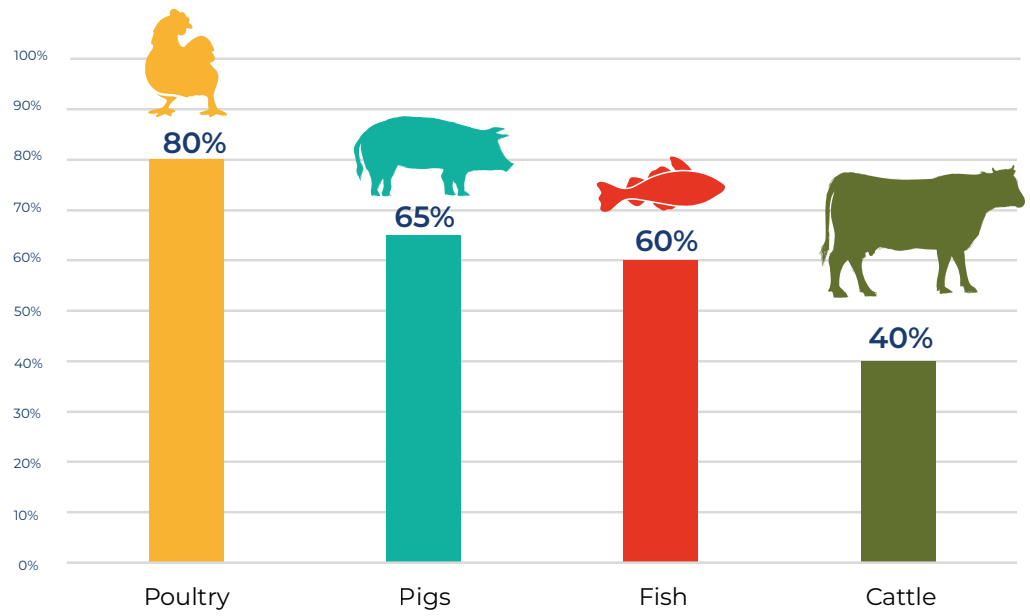
- Modernise EU feed additives legislation to restore its function as an innovation framework, enabling streamlined authorisation to foster innovation in feed additives that reduce enteric methane emissions, optimise the use of circular feed ingredients by improving nutrient bioavailability, support animal health, enhance animal welfare, etc..

- Launch an EU Circular Feed Roadmap to review existing regulatory restrictions to access to circular feed resources, optimise the regulatory framework for co-products of animal origin, stimulate single-cell proteins production and reuse of former foodstuffs as feed. The development of a methodology and an indicator are also essential to measure progress on feed circularity.

- Encourage the design of CAP eco-schemes in NSP's that reward farmers for the adoption of low-emission feeding strategies and incentivise the uptake of sustainable feeding strategies under the CAP, building on examples from Belgium, Portugal, Latvia and Slovenia.

- Establish the Product Environmental Footprint Category Rules for Feed for Food-Producing Animals and the GFLI (Global Feed LCA Initiative) database as common reference tools for environmental assessment, supporting "green feed labelling" to provide more market visibility and demand for "low-footprint" feed solutions .

Share of feed in the total production costs for poultry, pig, cattle and fish



Source: FEFAC

ATTRACTING LIVESTOCK & AQUACULTURE INVESTMENT AND FOSTERING INNOVATION

The long-term competitiveness and resilience of the EU livestock and aquaculture sector depend on sustained investments in technologies, knowledge and infrastructure that enable structural modernisation. A coherent long-term EU investment plan is essential to unlock the digital, genetic, nutritional, and health-related tools that allow livestock and aquaculture to modernise and remain competitive.

- Establish a long-term EU Investment Plan for livestock & aquaculture, listing designated funding opportunities at EC level (eg EU Competitiveness fund etc) to stimulate the uptake of innovations in digitalisation, genetic improvement and sustainable feed technologies & strategies.

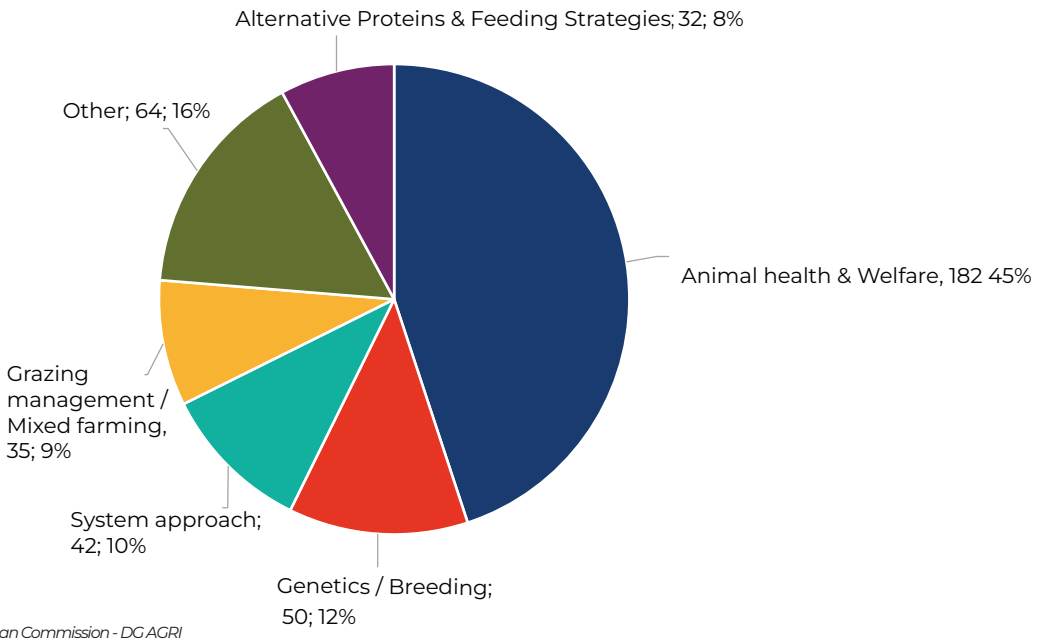
- Ensure that CAP and EU financial instruments are accessible to smaller and less-resourced producers, providing them with access to precision feeding, circular feed use and sensor-based technologies for all farm sizes.

- Channel dedicated R&I support towards New Genomic Techniques for oilseeds, protein crops and cereals, to reduce antinutrients, increase nutrient bioavailability, lower environmental emissions. Research should also aim at fostering a real breakthrough for high-yielding varieties of protein rich crops adapted to European agronomic conditions. The Commission should establish an agri-food innovation programme under Horizon Europe with targeted funding for feed-relevant crop improvement.

- Promote preventive animal health management as a strategic pillar of the EU Livestock Strategy, including vaccines and nutritional solutions to enhance resilience against animal diseases while reducing the need for antibiotic use.

- Establish dedicated technical subgroups under the Livestock Workstream, including one specifically focused on pre-farm gate activities involving feed industry, genetics, and animal health.

EU budget dedicated to research for the livestock sector



Source: European Commission - DG AGRI

EU PROTEIN PLAN AND STRATEGIC DEPENDENCY

The EU's dependence on imported "Hi-Pro" protein sources, above all soybean meal from the American Continent, represents one of the key structural vulnerabilities in the European food and feed system. Despite successive policy commitments to reduce this dependency, the EU continues to import approximately 70% of its "Hi Pro" plant protein needs (30 -50% crude proteins. Furthermore, the EU's reliance on a concentrated number of third-country suppliers for critical feed additives, including amino acids, vitamins and enzymes, predominantly sourced from China, constitutes a separate but related strategic EU dependency.

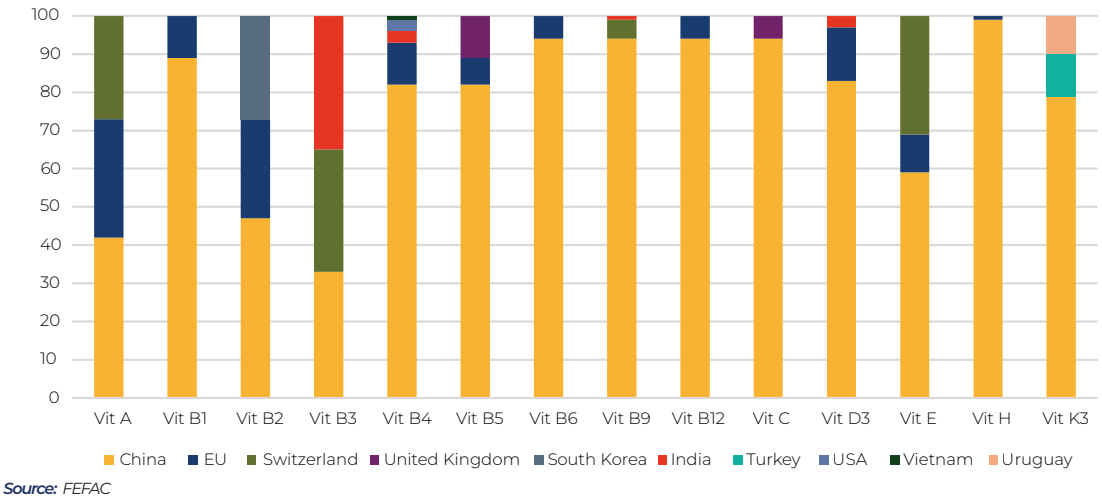
- Adopt an enhanced and holistic EU Protein Plan as a strategic policy instrument from 2027, with explicit and realistic objectives for domestic protein crop production, clear milestones and dedicated monitoring mechanisms. The Plan should cover plant and animal proteins, circular feed materials and alternative protein sources, rather than focusing narrowly on primary crop acreage. It should be accompanied by adequate financial incentives in and outside the future CAP budget and linked to broader objectives on climate, biodiversity and supply-chain resilience.

- Designate EU protein crops as a strategic priority in CAP National Strategic Plans, with enhanced coupled support via an additional 5% of coupled support available specifically to Member States that allocate this funding to protein crop production in their National Strategic Plans.

- Develop an EU-wide Biomass Balance Sheet to underpin evidence-based resource allocation policy for an optimal biomass allocation across food, feed, energy and other "non -food" applications, building on the existing EU Feed Protein Balance Sheet.

- Support and strengthen the EU's domestic production capacity for essential feed additives. The EU's capacity to formulate nutritionally optimal and environmentally efficient compound feed depends on reliable access to a range of functional feed additives, including nutritional additives like amino acids or vitamins, zootechnological additives like enzymes and also technological additives like emulsifiers or antioxidants, a significant proportion of which are currently sourced from a limited number of third-country producers, with China representing a particularly acute concentration risk. The Strategy should include a targeted action plan to support the maintenance and development of EU domestic additive production, reduce single-source dependencies and improve strategic stock management.

Market share in vitamin production in 2023 (%)



Source: FEFAC

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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