Facilitating the implementation of the

FEED SUSTAINABILITY CHARTER

FEFAC
Experts in Animal Nutrition

PROGRESS REPORT 2026

CONTRIBUTE TO CLIMATE-NEUTRAL LIVESTOCK & AQUACULTURE PRODUCTION THROUGH FEED

FOSTER SUSTAINABLE FOOD SYSTEMS THROUGH INCREASED RESOURCE & NUTRIENT EFFICIENCY

PROMOTE RESPONSIBLE SOURCING PRACTICES

CONTRIBUTE TO IMPROVING FARM ANIMAL HEALTH & WELFARE

ENHANCE THE SOCIO-ECONOMIC ENVIRONMENT AND RESILIENCE OF THE LIVESTOCK & AQUACULTURE SECTORS

Introduction

A message from FEFAC President, Nicolas Coudry-Mesny

I am pleased to welcome all readers to the 6th FEFAC Feed Sustainability Charter 2030 Progress Report, which is the first time for me to do so as newly elected FEFAC President. We are now well into the new European Commission's mandate, strongly focused on the implementation of the EU's "Open Strategic Autonomy" policy framework.

The three security dimensions of the **EU Competitiveness Compass** (defence, energy and food security) have triggered a series of legislative proposals, action plans, and free trade agreements deeply affecting the functioning of the agri-food chain. With a strong focus on simplification, while addressing strategic trade dependencies, the travel direction is clearly targeted at stimulating investments and accelerating take-up of technological innovations in the agri-food chain to strengthen its competitiveness, resilience and sustainability, which is a welcome change compared to the previous "top-down" approach towards value chain partners.

After five years of constant pressure, both the EU agri-food chain and, in particular, the livestock farming sector have moved back to centre stage. EU policy makers fully recognised its strategic importance as a key asset of the EU's economy in a fast-changing world characterised by growing geopolitical tensions, where power politics have moved multilateralism based on "common ground rules" to the back stage.

The **EU Livestock Strategy**, published by the European Commission on 7 July 2026, provides a very important policy signal, by sharing a 360° in-depth analysis of the EU's livestock sectors contribution to the EU's economy and flagship legal initiatives as well as the new wave of trade agreements, which require targeted financial support to accelerate its transition towards a higher level of resilience, competitiveness and sustainability. I've also personally witnessed these ambitions reflected in the very open, constructive and science-driven debates organised by the European Parliament Intergroup on Sustainable Livestock, addressing the key topics which matter most to our customers, the livestock farmers and related value chain partners.

The **EU Protein Action Plan**, released by the European Commission in conjunction with the Livestock Strategy, is more tailored to identify key policy measures which could leverage production of EU vegetable proteins, addressing specifically the EU's strategic feed dependency on imported "Hi-Pro" plant-based proteins for feed use, although a whole chapter is dedicated to promoting human food use of pulses and other plant-based proteins. FEFAC members welcome the overall ambitions laid down in the detailed list of actions, setting, among others, a new benchmark of 35% in 2035 of homegrown "Hi-Pro" vegetable proteins for feeding purposes, while strongly promoting circular feed solutions via increased use of co-products from the biofuel and food industry sectors.

At the same time, FEFAC continues to underline the importance of open markets as the EU will rely on Hi-Pro vegetable protein imports, in particular of soybean products, for many years to come. It is therefore very important for the EU Commission to ensure policy framework consistency to prevent confusing or even contradictory market signals. The recent classification by the European Commission of soybean oil as a high indirect land-use change (ILUC) risk feedstock under the Renewable Energy Directive (RED) would, in fact, threaten soybean production in the EU due to a proposed mandatory phase-out of soybean oil use in biofuels by 2030, which provides the most important market outlet for EU-produced soy oil. Fortunately, the European Parliament soundly rejected this proposal at its July plenary session.

Nonetheless, the largest concern for the EU's soy supply chain remains the very confusing and sometimes misleading implementation of the EUDR. It is truly frustrating to see legislation with such noble intentions create such high degrees of practical complications which are not compatible with existing chain of custody solutions. As our members are now facing the third year of "EUDR-induced" market disruption for soybean products sourcing, with no market offers for Q1/2027, we consider that it is high time for the European policy makers at Council and European Parliament level to take concrete and rapid action to prevent imminent market disruption for essential soy products, which could underline the policy objectives laid down both in the EU Livestock Strategy and the Protein Action Plan. FEFAC will certainly continue to advocate for targeted amendments which would allow the EUDR to finally align with existing, cost-effective, fully traceable and certifiable chains of custody solutions. In this regard, trade agreements like EU-Mercosur should facilitate discussions on proof of compliance through government-to-government relations.

We would also strongly support the Commission recognising government-issued proof of legality as evidence of compliance, where such mechanisms are established through trade facilitation provisions under the EU-Mercosur Agreement or other trade agreements with our trading partners.

The EU Protein Action Plan recognises the importance of synthetic amino acids as part of the protein complex, and it recognises that the import dependency (also for vitamins) is extremely critical. I am convinced that the good work of FEFAC contributed to the awareness-raising at the highest political level. The publication of the FEFAC study **"EU Vulnerability for Access to Essential Nutritional Feed Additives"** in September 2025 has been well received by EU policymakers, with the data and key findings pointing to an urgent need to develop effective measures to ensure the resilience and competitiveness of EU-based production of essential feed additives, including through the recommendations of the EU Critical Chemical Alliance and the modernisation and simplification of the EU feed additives regulatory framework.

I want to thank all members for their confidence in me as FEFAC President for the coming three years. I look forward to ensuring that our combined feed industry expertise and "fact-checking" advice, including sectoral impact assessments, continue to be shared effectively via all relevant EU Commission advisory groups, as well as at EU Council and European Parliament level, including the European Board on Agriculture and Food (EBAF). I also look forward to all the enriching debates and personal encounters with institutional and value chain partners and other stakeholders inside and outside the EU feed industry during my Presidency.

Nicolas Coudry-Mesny
FEFAC President

Linking the FEFAC Feed Sustainability Charter Ambitions with other overarching goals and objectives

Ambition 1

Contribute To Climate-Neutral Livestock & Aquaculture Production Through Feed

UN Strategic Development Goals

EU Competitiveness Compass

Decarbonising our economy

EU Code of Conduct for Responsible Business & Marketing Practices

A climate neutral food chain in Europe by 2050

Ambition 2

Foster Sustainable Food Systems Through Increased Resource & Nutrient Efficiency

UN Strategic Development Goals

EU Competitiveness Compass

Reducing dependencies

EU Code of Conduct for Responsible Business & Marketing Practices

- Enhancing circularity and resource efficiency
- Prevention and reduction of food loss and waste

Ambition 3

Promote Responsible Sourcing Practices

UN Strategic Development Goals

EU Competitiveness Compass

Decarbonising our economy

EU Code of Conduct for Responsible Business & Marketing Practices

Sustainable sourcing in food supply chains

Ambition 4

Contribute to Improving Farm Animal Health & Welfare

UN Strategic Development Goals

EU Competitiveness Compass

Closing the innovation gap

Ambition 5

Enhance the Socio-Economic Environment and Resilience of the Livestock & Aquaculture Sectors'

UN Strategic Development Goals

EU Competitiveness Compass

Reducing dependencies & closing the innovation gap

EU Code of Conduct for Responsible Business & Marketing Practices

Sustained, inclusive and sustainable economic growth, employment and decent work for all

Sustainable value creation in the European food supply chain through partnership

31st FEFAC Congress 2026

On 20 May 2026, FEFAC, together with its Romanian member association ANFNC, held its 31st FEFAC Congress in Bucharest, Romania, bringing together representatives from the European institutions, industry, farming organisations and international partners. Held back-to-back with the 13th ANFNC Annual Conference, the Congress was organised under the theme: "European Livestock Sector – Quo Vadis? Outlook to EU livestock and feed production in the Circular Bioeconomy".

The event was opened by ANFNC President Iani Chihaia, who welcomed participants by reaffirming the strategic importance of gathering industry leaders of the feed & food sectors and presented the opportunities and growth potential of the livestock and feed sectors in South-Eastern Europe. Outgoing FEFAC President Pedro Cordero then addressed participants as he concluded his three-year term, officially opening the 31st FEFAC Congress and underscoring the significance of the occasion as the first FEFAC Congress to be hosted in South-Eastern Europe. In this regard, he presented **FEFAC's latest policy recommendations** to the European Commission's new EU Livestock Strategy and EU Protein Plan. The recommendations focus on four key priorities: improving feed efficiency and innovation, supporting investment and modernisation, and reducing strategic dependencies in protein and feed additive supplies to foster a more sustainable and competitive livestock sector.

1st Panel Session: "EU & Ukraine agricultural trade relationship in the context of changing EU FTA agreements"

The 1st panel session, moderated by AGRA FACTS Editor in Chief Rose O'Donovan, looked at the outlook for EU agricultural markets and trade policy, with a particular focus on the evolving EU–Ukraine trade relationship and shifting EU Free Trade Agreements. Pierre Bascou (European Commission, DG AGRI) opened with a keynote, followed by contributions from Elli Tsiforou (Copa-Cogeca), Sergii Kharin (Corteva), Rosalind Leeck (USSEC), Alejandra Castillo (NAEGA), and Vasile Varvaroi (ARCPA).

Speakers returned repeatedly to one point: open, predictable trade remains strategically vital for the EU feed and livestock sector, which still relies heavily on imports of high-protein feed materials and feed additives. Diversified trading partnerships matter,

panellists said, as do Free Trade Agreements in shoring up food security, and the EU-Ukraine relationship came in for particular attention, with Ukraine's steady progress toward alignment with EU standards singled out as encouraging. There was also a clear call for trade policy to stay pragmatic and science-based, with regulatory clarity, especially on EUDR implementation, seen as essential to market stability and the competitiveness of European feed and livestock production.

Building real resilience in the EU agri-food sector, panellists concluded, will mean bringing production costs down, backing innovation, and giving farmers the tools and investment certainty they need to deliver on competitiveness, sustainability and food security alike.

2nd Panel Session: "How can feed additives support the transition to more sustainable livestock and aquaculture systems?"

The 2nd panel session, dedicated to feed additives, brought together representatives from industry and the European Commission, including Piotr Bonislawski (Elanco), Koen van Dyck (European Commission, DG SANTE), Joerg Seifert (FEFANA), Pieter Bastiaanssen (ECA Trouw Nutrition), Silvia Sonneveld (DSM-Firmenich), and Eddy Piron (Huvepharma). The discussions focused on the contribution of feed additives to more sustainable livestock production, while addressing the regulatory and competitiveness challenges facing the European feed additive sector.

Speakers highlighted the important role of feed additives in improving animal health and welfare, enhancing feed efficiency, reducing environmental emissions, and supporting the One Health approach. While welcoming the European Commission's proposal to remove the 10-year renewal requirement for most feed additive authorisations and introduce digital labelling, industry representatives stressed that further modernisation of the regulatory framework is needed to foster innovation. Particular concerns were raised over lengthy authorisation procedures, the absence of provisions for sustainability-related secondary claims, and transparency requirements that may discourage companies from seeking EU authorisation.

The discussion also addressed the strategic importance of maintaining European production capacity for essential feed additives, particularly vitamins, amid growing dependence on imports from third countries. Panellists underlined that strengthening the competitiveness of EU manufacturers, safeguarding supply security, and ensuring a predictable regulatory environment will be essential to deliver innovative solutions that enable farmers to improve both environmental and economic sustainability.

3rd Panel Session: “Opportunities and challenges for a circular feed & livestock sector in the EU Bioeconomy”

The final session, moderated by FEFAC Deputy Secretary General Anton van den Brink, brought together voices from across livestock, feed, farming, bioenergy and co-products: Zeev Noga (UECBV), David Carpintero (ePURE), Oana Neagu (Copa-Cogeca), Alexander Romme (EFFPA), Marc Sneyders (Bayer) and Arturo Hernangomez (ANPROGAPOR).

Panellists pointed to circular feed solutions, biofuel co-products, and former foodstuffs among them as a genuine driver of resource efficiency and waste reduction across the agri-food chain. What’s needed now, several argued, is a policy framework that actually supports investment, ties the bioeconomy more closely to the Common Agricultural Policy, and makes sure the value created flows back to farmers rather than stalling elsewhere in the chain. Livestock, and the pig sector in particular, came up repeatedly as central to putting co-products to good use and building a more circular food system, though speakers agreed that further environmental gains will hinge on stronger regulatory backing and real investment incentives.

Closing the Congress, newly elected FEFAC President Nicolas Coudry-Mesny concluded that addressing today’s geopolitical, economic and sustainability challenges will require innovative thinking, open dialogue and a shared commitment from all stakeholders to deliver practical solutions for the future of the European livestock sector.

FEFAC President, Nicolas Coudry-Mesny

FEFAC Secretary General, Alexander Doring (L), ANFNC President, Iani Chihaia (R)

Ambition 1

Contribute To Climate-Neutral Livestock & Aquaculture Production Through Feed

EU Competitiveness Compass

Decarbonising our economy

UN Strategic Development Goals

EU Code of Conduct for Responsible Business & Marketing Practices

A climate neutral food chain in Europe by 2050

The Global Feed LCA Institute (GFLI) has continued to develop the quality, functioning and value of its Database. This global initiative, of which FEFAC is a founding member, is increasingly positioning itself as a key pillar in carbon footprinting for the agri-value chain.

At EU level, the momentum for regulated approaches to carbon footprinting has been waning. The political negotiations on the Green Claims Directive have not advanced in the past year since becoming politically stalled in June 2025. Continued delays have caused the anticipated update of the EF Method to be postponed until further notice. The development of a new European Commission database for environmental footprint data (the EF 4.0) has also run into problems, thereby showing that building and running an LCA Database is a considerable challenge.

The GFLI Database was first established in 2019 and has gradually been developing. Following member requests, the GFLI has been adapting its Database to enable reporting of scope 3 emissions in line with SBTI-FLAG requirements. The number of datasets in the GFLI Database has been expanding, also with “Branded Data”. GFLI Branded Data enables companies to develop product-specific datasets in accordance with the GFLI Methodology, thereby showcasing that their performance has been quality-assessed.

In the coming period, the GFLI will also launch its Data-In Generator Tool for marine ingredients. Funded by the Norwegian Seafood Research Fund, the tool has the objective to make the generation of datasets considerably more accessible, affordable and less burdensome, due to automated modelling capacities for which companies, researchers and other stakeholders currently still fully rely on external consultants. With the tool being verified for compliance, the process of an internal GFLI review would also not be necessary, while there is an integrated system for external reviewers. The current version of the tool is still catered to the generation of marine fish ingredients, but the proposal is to expand it to also make it suitable for other feed ingredients, either crop-based or co-products. The tool will be available for both sector and branded data, where, for the latter, there will likely be a pilot phase for companies to make trials.

In 2026, the national feed federations in Denmark (DAKOFO), France (EUROFAC), Germany (DVT) and the Netherlands (Nevedi) signed bulk licence agreements with the GFLI, which is a milestone in creating access for the mainstream market to datasets to calculate carbon emissions of compound feed. The tailor-made licenses enable a sector-wide approach that drives a uniform implementation in the entire country, which also sends a stronger signal to the rest of the value chain when these datasets are communicated to customers, as opposed to when only the large companies in each country would use the GFLI Database.

Ambition 2

Foster Sustainable Food Systems Through Increased Resource & Nutrient Efficiency

The EU Protein Action Plan, released on 7 July 2026, mentioned the importance of harnessing the potential of greater circularity in supply chains via better use of the bioeconomy to support more efficient use of biomass. FEFAC is actively facilitating discussions on how future resources of circular feed could be enabled.

EU Competitiveness Compass

Reducing dependencies

UN Strategic Development Goals

EU Code of Conduct for Responsible Business & Marketing Practices

Enhancing circularity and resource efficiency

Prevention and reduction of food loss and waste

On 3 June 2026, FEFAC, BFA (Belgian Feed Association), and Nevedi (Dutch Feed Industry Federation) facilitated the Circular Feed Symposium **"The Next Frontiers of Circular Feed"** during the VICTAM International Expo in Utrecht. This workshop, with 65 participants, was an opportunity to highlight the latest developments in circular feed-related resources, giving the floor to various speakers to present their products, innovations, and recommendations. The potential of circular feed was highlighted through a series of presentations.

Sam De Campeneere presented a new pathway for innovative feed through the ILVO (Flanders Research Institute for Agriculture, Fisheries and Food) Feed Pilot Plant. This new plant, inaugurated in April 2026, is available to feed industry stakeholders to run experimental feed diets and feeding trials with the choice of two different batch-size production lines, both considerably smaller than in a regular feed plant. This Feed Pilot Plant will therefore also enable experimentation with feed formulation using different types of circular feed, thereby introducing innovative products.

The production site is planned to open for production requests by August 2026.

Alexander Romme, the President of EFFPA (European Former Foodstuff Processors Association), explained the essentials of former foodstuff processing and the nutritional values of the products. He highlighted the role of sustainability as a driver for the creation and demand for former foodstuffs, due to the need to reduce food waste, increase circularity and lower the carbon footprint. He pointed to the challenges posed by the interpretation and enforcement of the Animal By-Products legislation as a key obstacle for the sector, causing market barriers and differentiated implementation, even within the same country.

Carine van Vuure from EFPRA (European Fat Processors and Renderers Association) showed the key role of animal rendering in the circular bioeconomy, highlighting also the sustainability and nutritional profile of animal by-products such as processed animal proteins. She brought forward EFPRA's requests for amending several legal requirements for the sector, such as open export for category 2 MBM (meat and bone meal) for all purposes, allowing intra-species recycling of PAP in non-ruminant feed and lifting the feed ban for ruminant PAP in non-ruminant feed.

Stef Denayer gave a presentation on the Industrial scaling of fermentation of proteins and the link with feed applications, representing Bio Base Europe and their pilot plant in Ghent, Belgium. As members of "The ProteInn Club", they have been working with other members on enabling innovative value chains for fermentation-based microbial proteins. He presented a range of projects of single-cell protein production, using a variety of feedstocks, while working on the scalability of their operations, also with the help of mobile units.

Nele Ameloot from Ghent University presented the innovative project of transforming industrial CO2 emissions from steel production into ethanol, which is then used to produce single-cell proteins for use in fish feed. Through microbial fermentation and scale-up of their production processes, they have achieved a product with a protein content outperforming plant-based alternatives and producing results similar to fishmeal in fish feeding trials. Their next step is to determine the technical and economic feasibility of a production scale-up and large-scale use of the product.

Speakers at the FEFAC-BFA-Nevedi workshop

Eleni Ntokou from Unibio presented a company experience in new ways to efficiently transform methane into single-cell proteins for feed through a gas-to-microbe pathway. With the presentation of a full nutritional profile and trials in fish and piglet feed, they have achieved a product which can replace fish meal and provides quantifiable results. Commercial-scale production is already underway, and their next frontier is integrating renewable methane streams into feed production.

Clazien de Vos from the Wageningen Bioveterinary Research presented a risk assessment overview on the prevalence of BSE, African Swine fever and Foot and Mouth Disease, with a view to determining the safety of using residual streams from restaurants as feed. feed. The research indicates that the disease spreading risk associated with this practice today in Europe is very low, with the appropriate treatment and control measures applied to the material. Nevertheless, there are also factors which may complicate a reintroduction of these resources, such as physical, microbiological and chemical hazards, and the intra-species recycling ban.

In the final presentation, Sara Stiernström from EasyMining explained the innovation of transforming sewage sludge ash into (feed) phosphate. Highlighting the heavy dependence of Europe on imported rock phosphates from a limited number of countries (including Russia), the recycled phosphates are a means to provide more sourcing options, which EasyMining highlights as having a better safety profile in terms of cadmium contamination. The recycled phosphates are already authorised as fertiliser for conventional and organic farming and went under a successful safety assessment from the Swedish Veterinary Agency (for use in feed. The company has submitted an application for approval in feed in Canada and awaits action from the European Commission to mandate EFSA to perform a safety assessment.

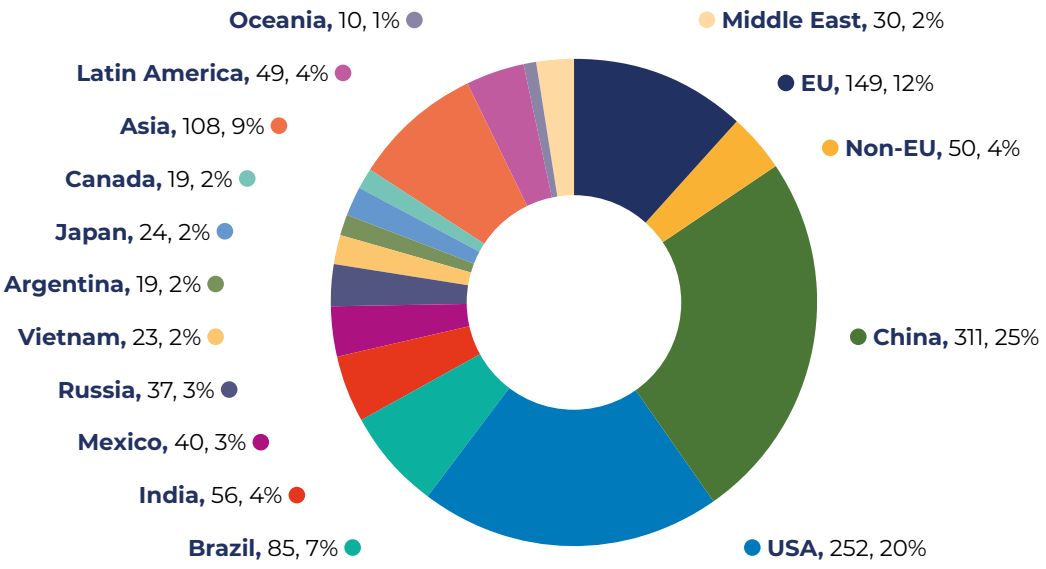
FEFAC new edition of Feed & Food Report 2025

In April 2026, FEFAC released the upgraded edition of its **Feed & Food Report**, giving a fresh and updated look at the market sector's data, making it easier to navigate and share. Drawing on consolidated data from the 2024 calendar year, the report covers compound feed production, raw material use, sector turnover, and evolving trends in meat production and consumption across Europe.

It also points to several structural developments in the European feed market, including the stabilisation of EU feed production, the growing share of poultry feed, and the sector's continued reliance on imported protein sources.

Beyond the figures, the report examines the market, policy, and sustainability drivers shaping the sector's outlook, from international trade developments and environmental constraints to innovation in feed formulation, giving members and stakeholders a clear, accessible picture of where the European feed industry stands today and where it is headed in its contribution to sustainable livestock and aquaculture production.

Global compound feed production in 2024 (1260 mt.)



Source: *FEFAC based on Alltech*

Ambition 3

Promote Responsible Sourcing Practices

Again, the EU Deforestation Regulation (EUDR) remains the key topic of attention for FEFAC members in this domain. Despite not having any products in the scope of the Regulation, the uncertainties for compound feed manufacturers to have sufficient and affordable access to soy products drive strong concerns.

EU Competitiveness Compass

Decarbonising our economy

UN Strategic Development Goals

EU Code of Conduct for Responsible Business & Marketing Practices

Sustainable sourcing in food supply chains

The EUDR was postponed for a second year in a row, with the current entry into application date foreseen on 30 December 2026. FEFAC and its chain partners COCERAL and FEDIOL were again part of the group of stakeholders who highlighted the untenable situation and the urgent need to address EUDR implementation concerns. In FEFAC's view, the simplification packages released by the European Commission have not delivered the needed assurance and clarification to the operators in the soy value chain, causing the feed industry to experience 'frozen markets' for the needed soy products in compound feed manufacturing. The situation remains critical, with similar market experiences in summer 2026 compared to the previous two years.

In March 2026, FEFAC released the **3rd update on EUDR soy trade disruption and economic impact assessment**, pointing to an estimated direct extra procurement costs of up to 1.65 Bio€ for EUDR-compliant soy. Indirect costs for other Hi-Pro protein sources may lead to a total cost increase for Hi-Pro feed ingredients of 2,4 Bio € for the calendar year 2027, as quotations for rapeseed meal and sunflower meal are linked to soybean meal prices. This could trigger higher costs for pigmeat production of

up to 70€/ton and up to 25 €/ton of poultry meat, in a context of weaker EU livestock markets, which may seriously undermine the competitiveness of EU livestock production. FEFAC foresees updating its economic impact assessment in Q3 2026.

In Q2 2026, the final scheme passed the benchmarking exercise performed by ITC (International Trade Centre) against the **FEFAC Soy Sourcing Guidelines 2023**. This brought the total to 21 schemes that are benchmarked. The strong interest in benchmarking shows the continued value of the FEFAC Soy Sourcing Guidelines for owners of responsible soy certification and verification schemes and programmes. Admittedly, there was more hesitation from several schemes and programmes to initiate the benchmarking exercise due to the uncertainties involving the requirements of the EUDR. Although the EUDR only awards limited value for certification schemes, numerous schemes do wish to profile themselves as a solution here, therefore wanting to ensure their systems are, first of all, optimised for catering to EUDR-relevant services.

The experiences from the EUDR and the FEFAC Soy Sourcing Guidelines have demonstrated that more transparency on the application of chain of custody models would be beneficial for mainstream market implementation of traceability systems in the soy value chain. FEFAC has made efforts with its members to learn more about the application of mass balance systems, including new conceptual approaches such as controlled mass balance and controlled blending. This discussion is also becoming highly relevant in the domain of measuring scope 3 emissions in function of SBTI commitments, as internationally operating stakeholders such as the GHG Protocol, WRI, ISO and ISEAL are contributing to developing practical frameworks where mass balance sourcing systems have a value in claiming reduced GHG emissions, under certain conditions.

FEFAC & Sindirações deepen ties to safeguard global feed supply chains

In August 2026, **FEFAC and the Brazilian Feed Industry Association (Sindirações) signed a Memorandum of Understanding** to deepen cooperation between the European and Brazilian feed sectors. The agreement focuses on shared priorities, including feed safety, animal health and welfare, biosecurity, international feed and food standards, sustainable feed production, and regulatory developments affecting the sector.

A key element of the MoU is the exchange of regulatory insight, helping both organisations track legislative developments such as feed ingredient approvals, labelling requirements, and maximum residue levels. Cooperation also extends to global platforms including Codex, WOAH, and the WTO, in support of science-based international standards.

The cooperation will further address sustainable feed production, including responsible sourcing and the environmental footprint of feedstuffs. In the area of trade, the partnership is expected to facilitate the implementation of the EU- Mercosur Partnership and Interim Trade Agreements, contributing to EU-Brazil and EU-Mercosur dialogue on trade in key feed ingredients such as soy products, feed grains, biofuel co-products, and essential feed additives.

FEFAC President Nicolas Coudry-Mesny welcomed the reinforced partnership, pointing to Brazil's significance in global feed production and trade, and stressing the shared goal of securing EU feed supply alongside a competitive, sustainable European livestock sector. Sindirações President Roberto Ignacio Betancourt echoed the sentiment, underlining the EU's pivotal role in global feed trade and the importance of preserving market access to support resilient, sustainable growth on both sides.

From the right: Sindirações Executive Vice-President, Ariovaldo Zani; FEFAC President, Nicolas Coudry-Mesny; Sindirações President, Roberto Ignacio Betancourt; FEFAC Market & Trade Policy Officer, Rodrigo Nascimento

FEFAC
Experts in Animal Nutrition

sindirações
Sindicato Nacional da Indústria de Alimentação Animal

Ambition 4

Contribute to Improving Farm Animal Health & Welfare

EU Competitiveness Compass

Closing the innovation gap

UN Strategic Development Goals

Improving Animal Health and Welfare starts with the implementation of good husbandry practices and the use of feeding strategies to reduce the need for medicinal treatment.

The EUSAVet report, based on use data provided by Member States, shows an increase in use of antimicrobials in food-producing animals by 5% in 2024 compared with 2023, after a decade of continuous decline. The 50% reduction target for antimicrobial consumption by 2030 compared to 2018 still remains achievable (we are halfway with a 24% reduction), but reaching the target will be demanding, as each reduction unit is becoming increasingly difficult to achieve. One thing that can be learnt from this report is the continued reduction in the proportion of antimicrobials delivered via medicated feed; this decreased by 63% between 2018 and 2024, and even by 80% compared to 2011. Medicated feed with antibiotics represents nowadays 12% of the total antimicrobials delivered to food-producing animals, which means that the bulk of the efforts to further reduce the use of antimicrobials in farm animals is to be found in the direct on-farm use of oral powders and oral solutions.

There is ample evidence that animal nutrition and feeding strategies can help to support animal health & welfare, and there is still more to come in terms of formulations and functional feed ingredients that can help animals cope with health challenges. FEFAC is actively pushing via the Animal Task Force and its **Strategic Research & Innovation Agenda**, the EU Partnership on Animal Health and Welfare (EUP AH&W) and the AMR One-Health Network for an ambitious animal health and welfare research agenda that stimulates preventative measures based on vaccination and also nutrition-based solutions.

FEFAC also contributes via its active membership in EPRUMA (European Platform for the Responsible Use of Medicines in Animals) to the dissemination of best practices in livestock farming. This involves, among

others, the implementation of effective biosecurity measures, both on farm and upstream in the feed supply chain. Following the 2025 joint FEFAC/FAO workshop on biosecurity along the feed and livestock chain both at EU and global level, FEFAC will issue an upgraded version of its biosecurity guidance in the coming months.

What is now missing for an effective uptake of nutritional solutions to help animals cope with pathogenic challenges is an enabling environment that stimulates innovation and uptake of these solutions. During our last Congress, we had the opportunity to point to the weaknesses of the regulatory framework for feed additives, which discourages potential applicants. We also pointed to a lack of willingness of national governments to provide financial support via eco-schemes to the uptake by farmers of special feed ingredients or formulations, often more expensive than conventional feed and also suffering from a deficit of visibility due to legal constraints in terms of claims, often in a grey zone.

While animal nutrition is a key tool for enhanced animal health and welfare strategies, its primary objective remains to deliver to animals the nutrients they need in the right proportion. This can become a challenge in organic livestock farming due to legal restrictions, in particular regarding the mandatory use of organic feed protein sources and the ban on the use of synthetic amino acids. FEFAC provided to the EU Commission scientific evidence that complying with these requirements negatively impacts the welfare of laying hens, due to a deficiency in methionine. FEFAC asked for the current derogation for the use of up to 5% of non-organic feed proteins to be not only maintained for piglets and young poultry but also extended to laying hens.

Ambition 5

Enhance the Socio-Economic Environment and Resilience of the Livestock & Aquaculture Sectors

EU Competitiveness Compass
Reducing dependencies & closing the innovation gap

UN Strategic Development Goals

EU Code of Conduct for Responsible Business & Marketing Practices

Sustained, inclusive and sustainable economic growth, employment and decent work for all

Sustainable value creation in the European food supply chain through partnership

The EU Livestock Strategy, released on 7 July 2026, meant a full political recognition of the importance of improving the socio-economic environment of livestock farmers, which is something where animal feed production plays a crucial part. Competitiveness, resilience and support for investments are key elements that underpin the European Commission's ambitions, with simplification seen as an essential component.

In December 2025, the European Commission published the **Food and Feed Safety Omnibus**, which was the tenth simplification package as part of the Competitiveness Compass. The proposal to make amendments to the Feed Additives Regulation is the area of key interest to FEFAC. In this regard, FEFAC strongly supports the proposal to end the 10-year limitation on the authorisation of feed additives, as the authorisation renewal process has been seen as a burdensome administrative requirement, without much added value. Though the Omnibus package will help to improve several aspects of the Feed Additives Regulation, FEFAC does still see a need for a full 'modernisation' of the Regulation, as the regulatory approval system for new, innovative feed additives is still a disproportionately burdensome process, putting the EU at a competitive disadvantage compared to practices on other continents.

The competitive disadvantage as regards the production of feed additives in Europe goes far beyond the approval system, however. In September 2025, FEFAC published the study **"EU Vulnerability for Access to Essential Nutritional Feed Additives"**, followed by a **Recommendation paper** in March 2026 as input for reflection on future measures and tools to mitigate the EU strategic dependency regarding access to essential vitamins and amino acids. The study finds that the EU is dramatically dependent on Third Countries for almost all of the vitamins and amino acids it needs to feed animals. Furthermore, China holds an ultra-dominant position on the global market of these substances, and even a quasi-monopoly for some, meaning that the EU feed, livestock and aquaculture sectors have very limited opportunities to diversify their sourcing.

EU Commissioner for Agriculture & Food, Christophe Hansen at LORIAL Feed Mill Production Site, Molsheim, Alsace

FEFAC called on EU authorities to acknowledge the extreme feed and food security vulnerability of the EU by recognising as critical both the vitamins and the amino acids supply chains and as deserving an urgent reaction in the framework of the EU Open Strategic Autonomy objectives via a set of measures to mitigate the EU vulnerability. In this regard, the factory visits arranged by FEFAC, DVT and EUROFAC to a compound feed production and vitamin production site for European Commissioner for Agriculture & Food, Mr Christophe Hansen, on 6 July 2026 was very timely to discuss the needs for investing in EU production capacity.

FEFAC welcomed the political agreement reached on plants obtained by **New Genomic Techniques (NGTs)** in the past year, which followed lengthy and complex negotiations since the European Commission proposal

EU Commissioner for Agriculture & Food, Christophe Hansen at DSM-Firmenich Vitamin Production Site, Grenzach

back in 2023. The new framework provides a balanced, science-based approach that enables innovation in plant breeding while ensuring transparency, safety and legal clarity across the agri-food value chain. It creates the conditions for developing improved crop varieties that can help address key challenges facing European agriculture, including climate change, increasing pressure from weeds, pests and diseases, improved resource efficiency and long-term food security.

In January 2026, FEFAC Deputy Secretary General Anton van den Brink became Chair of the European Livestock Voice (ELV). The ELV is an initiative supported by 14 livestock-related EU associations, with the ambition of defending and promoting the role of the livestock sector in policy discussions. The activities of the ELV contributed to the momentum for the creation of an EU Livestock Strategy as well as the establishment of the European Parliament Sustainable Livestock Intergroup. On 30 April 2026, the Intergroup held a session dedicated to "How can circular feed and feed additives be deployed to reduce emissions in monogastric livestock farming?".

MEP Benoit Cassart (L), ELV Chair, Anton van den Brink (R)

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