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FEFAC initial assessment of drought impact on EU feed supply chains and possible mitigation measures

FEFAC's national feed industry associations confirmed significant adverse impacts from repeated heatwaves in many EU Member States, both in Central, Southern and South-Eastern Europe as well as in key production regions in North-Western Europe. This assessment aligns with findings highlighted in the [JRC MARS report](#), published last week and the [initial impact assessment](#) published by Copa-Cogeca.

The most severe impacts on the feed supply chains are the shortage of forages and summer crops, which mainly affect the cattle population, with farmers forced to already start feeding winter silage/forages increasing feed insecurity. The expected substantial shortfall in EU maize production will further exacerbate pressure on the feed supply chain in the coming months, reducing availability of both maize silage and maize grain on the EU market.

This exceptional situation, already considered worse than the last major EU heat wave recorded in 2018, calls for exceptional measures to help facilitate the EU feed supply chain's coordinated efforts to alleviate pressure on the supply of essential feed grains and forages. FEFAC members are fully engaged in assisting and supporting downstream value chain partner efforts, ensuring feed and food security and business continuity at the livestock farm level, while safeguarding animal welfare through adaptation of diet formulations to cope with heat stress. However, further contingency measures are urgently required at EU level to help mitigate and prevent the growing risk of disruption of essential feed supplies, particularly in the ruminant sector.

In our view, the drought situation calls in particular for initiating again the full range of EU crisis mitigation measures released in 2022 as part of the response to the combined effects of the COVID crisis the direct impact of the Russian invasion in Ukraine, which led to a severe disruption and shortfall in the availability of feed grains, in particular maize, for which the EU faces a structural deficit.

FEFAC experts' feed market impact analysis

- At this stage, FEFAC market experts expect an additional import need for the EU in the new marketing year of more than 7 mio. tons of maize, leading to a total EU import estimate of more than 26 mio. tons (main origins: Ukraine, USA, Brazil). This situation also requires facilitating access to feed grains from other Third Countries to diversify the sourcing;
- Increased market access to imported fibre crops / co-products is also essential especially for ruminants to compensate for the loss of forages (Palm Kernel Expeller, sugar beet pulp, distiller grains). Concerning PKE, the current implementation date of 31/12/2026 for the EU Deforestation Regulation will significantly reduce market availability (current EU imports reach 2 mio. tons / annually);
- A lower forage harvest means also increasing the EU feed protein deficit, including for organic feed materials. This will lead to additional pressure and demand on import of soy products used in feed. FEFAC's latest EUDR trade disruption and economic impact assessment indicates additional direct feed sourcing costs for soy products of more than 1 bio. € for 2027, with no guarantees on sufficient market availability to meet expected increased EU import demand (35 mio. tons in 2025). This is economically unviable for EU livestock farmers in the context of depressed prices for most livestock products.

FEFAC recommendations on mitigation measures to ensure feed supply security

In our first evaluation, the EU authorities should envisage the following targeted **short-term mitigation measures** to strengthen the EU feed chain's capabilities to compensate (at least partially) for the shortfall of forages and feed grain crops: **The EU should:**

- **ensure open transit of and market access to feed grains originating in Ukraine;**
- **consider temporary derogations at national level**, where necessary, **for setting risk based MRL's for imported feed grains** destined for exclusive feed use, subject to EFSA evaluation to ensure feed safety, as have been granted in 2022 in compliance with the EU legislation;
- **suspend application of EUDR for Palm Kernel Expeller**, to safeguard market access to a key alternative fibre source for ruminants in 2027;
- **speed up work for further real simplification measures and reduction of administrative burden for operators, linked to EUDR implementation for soy products used in feed;**
- **consider extension of the EU temporary derogations for protein sources in organic feed, and for forages.**

In addition, **the EU and Member States should** allow for temporary derogations at national level for feed truck driving hours incl an increase of max load for "cross-border" feed transports to 44 tons (national derogations exist but are currently not applicable for cross-border transport of feed to drought -stricken regions), **including further state aid measures reducing fuel costs in the feed chain**. These derogations are necessary due to continued low water levels in main inland shipping corridors, requiring transfer of significant volumes of feed materials to road and rail transport, increasing feed transport costs.

FEFAC calls also for mid-to longer term measures:

- The EU should accelerate ongoing efforts to strengthen the resilience of home-grown production of feed grains and forages as laid down in the recently published EU Protein Action Plan. This includes **improved seeds for drought-resistant crops using NGT technology**;
- Targeted **investments via European Competitiveness Fund (ECF) in EU transport logistics and infrastructure, incl storage capacity**, which could lower costs in moving feed grains and forages from EU feed grain surplus regions to deficit areas;
- FEFAC also urges the European Commission to **broaden the scope of the Food and Feed Safety Omnibus package**, including the ABP legislation and other parts of the EU feed legislation, which could facilitate availability of safe, circular alternative feed resources;
- FEFAC strongly **recommends establishing a biomass balance sheet both at national and EU level** to better monitor availability of eligible Biomass resources for feed use, including co-products from biofuel and other food and non-food industries.

Notes to the editor:

1. FEFAC, the European Compound Feed Manufacturers' Federation, represents 27 national associations in the 26 European countries.
2. The European compound feed industry employs over 100,000 people on the approx 3,200 production sites, often in rural areas, which offer few employment opportunities.
3. Farm animals in the EU27 consume an estimated 644 million tonnes of feed per year, of which app 23% or 152 million tonnes (2025) are produced by compound feed manufacturers. The turnover of the European compound feed industry is estimated at €63 billion.
4. For more information, see our website (www.fefac.eu) or please contact Alexander Döring, Secretary General, Tel. +32-2-285.00.50, Fax +32-2-230.57.22, e-mail: fefac@fefac.eu.