

Mr. Martin Heydon
Irish Minister for Agriculture,
Food and the Marine
President of the AGRIFISH
Council

By e-mail

Brussels, 24 September 2026

Market Situation AGRIFISH Council 28-29 September

FEFAC calls for a contingency plan to safeguard essential feed supplies to the EU Livestock Sector

Dear Mr Heydon,

In light of key recommendations and conclusions shared on the Livestock Strategy and EU Protein Action Plan at the EU Informal Council meeting, FEFAC members representing EU compound feed and premix manufacturers would like to share their overview of current challenges affecting EU feed security in the new marketing year 2026/2027.

Our market experts consider that the cumulative adverse effects of the EU summer drought (JRC MARS Bulletin report/COCERAL September forecast), the sharply reduced availability of Ukrainian feed grain due to Black Sea trade disruption, and the imminent implementation of the EUDR have increased significantly the risk of feed supply chain disruption for essential feed materials.

These combined pressures on the feed supply chain may also undermine the economic viability of key EU livestock sectors – dairy, pork and poultry – which may further drive food price inflation and foreclosure of livestock farmer operations, further increasing EU dependency on imports of products of animal origin.

In this exceptional market situation, **FEFAC calls urgently for a contingency plan to safeguard the supply of essential feed materials**, detailing all available mitigation measures to alleviate the adverse impacts of the EU drought on homegrown feed grain availability, feed grain supplies from Black Sea, and reducing admin burden linked to EUDR implementation for essential feed ingredients (soybean meal and Palm kernel expeller).

Overview on key pressure points and their impacts on essential feed supply chains

1. Drought – shortfall on EU fibre and maize products

FEFAC's own assessment indicates the drought will increase EU maize import needs by more than 7 million tonnes in the new marketing year, pushing total imports above 26 million tonnes (mainly from the US and Brazil).

We also expect there to be a need to increase EU imports of high fibre feed materials and co-products such as palm kernel expeller (PKE), sugar beet pulp, citrus pulp and distillers' grains to offset the shortfall of forage and silage production for cattle and other ruminants. The drought also affected, although to a lesser extent, the availability of EU homegrown oilseeds and protein crops, leading to reduced availability of Hi-pro feed ingredients, which will further increase the demand for imports of these materials.

2. Black Sea – Access to Ukrainian feed materials (corn, soy, rapeseed and sunflower meal and feed wheat)

At the same time, the Black Sea has become the site of the most severe trade disruption since the Russian aggression began, undermining the alternative sourcing flexibility the EU would otherwise rely on. Ukraine exported only about 500,000 to 822,000 tonnes of grain in the first weeks of August 2026, roughly 20% of normal volumes, and while the EU is in active discussions with Ukraine and neighbouring states on so-called "solidarity lanes," these efforts have been complicated by historically low water levels on the Danube limiting vessel capacity. The EU's structural protein deficit is exacerbated by these additional shocks.

3. EUDR trade disruption risk for Soybean Meal and Palm Kernel Expeller

The compound feed manufacturing sector has conducted its [4th trade disruption and economic impact assessment](#) in relation to the imminent EUDR entry into application on 31st December 2026. Our study indicated that the EU may face a significant shortfall of up to **4 million tonnes of SBM imports. This is roughly 20% of the EU's total SBM imports in 2025/2026 for the 2026/2027 marketing year, and there are very limited local substitution options available.**

This worst-case scenario will create additional adverse economic impacts via increasing costs for SBM procurement purchases due to the fact that the price of a commodity which is in short supply is set by the cost of the most expensive "last" tonne available to meet EU demand. This is the same mechanism that drives electricity and other commodity markets.

In addition, we expect the availability of PKE imports to be significantly reduced. This could be up to -75% of average EU imports of around 2 million tonnes annually, further driving the cost for alternative fibre products.

4. FEFAC Recommendations and exceptional mitigation measures that should be included in the contingency plan to ensure feed security and to avoid adverse economic impacts on the EU livestock sector in 2027:

- Facilitate market access to alternative high-fibre feed materials (incl. palm kernel expeller (PKE), sugar beet pulp, citrus pulp and distillers' grains);
- Reinitiate coordination on facilitating shipments of Ukrainian feed ingredients from Ukraine via EU solidarity lanes;
- Prevent Trade disruption of Soybean meal and Palm Kernel expeller linked to EUDR implementation,

FEFAC members invite the AGRIFISH Council to consider the need for a targeted reopening of the EUDR to safeguard market access to essential imports of Soybean meal and Palm Kernel Expeller by simplifying proof of legality requirements, among others, to improve EUDR readiness of national competent authorities and feed supply chain operators. **A temporary partial suspension of certain provisions of EUDR for feed materials covered in Annex I:** soybean products, palm kernel expeller, palm fatty acid distillates and cocoa husks may be necessary as an emergency measure, until these additional targeted amendments can be implemented.

FEFAC members therefore invite the EU Farm Council to discuss the urgent need for an EU contingency plan to safeguard essential feed supplies, ensuring business continuity of livestock farmer operations and the key objectives set out in the EU Livestock Strategy. Feed supplies are a key pillar to support the resilience and competitiveness of livestock producers as well as the affordability of food of animal origin for EU consumers.

Many thanks for considering our feed market analysis and recommendations on how to address key pressure points in EU feed essential supply chains.

We remain at your disposal to discuss these concerns.

Yours sincerely,



Nicolas Coudry-Mesny

FEFAC President

Cc: EU-Perm Rep, Mr. Christophe Hansen, Mr. Markos Sefcovic, Ms. Jessica Roswall
Members of the European Commission