

# FEED & FOOD

2021

## ABOUT FEFAC

The European Feed Manufacturers' Federation (FEFAC) was founded in 1959 by five national compound feed associations from France, Belgium, Germany, Italy and the Netherlands. Today, FEFAC membership consists of 23 national associations in 23 EU Member States as well as Associations in Norway, Russia, Serbia, Switzerland, Turkey and UK and 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 member of IFIF and holds observer status in CODEX Alimentarius."

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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 candidate countries, and FEFAC own calculations. The others have been extracted from the EUROSTAT database and data released by DG Agriculture, AVEC and Alltech.

As far as Luxembourg, Greece and Malta are concerned, no data on industrial compound feed production, feed materials consumption & turnover are available. Therefore, FEFAC tables & graphs do not take into account the figures of these countries. Nevertheless, total industrial production is estimated: Luxembourg: 90,000 t, Malta 80,000 t, Greece: 4,000,000 t.

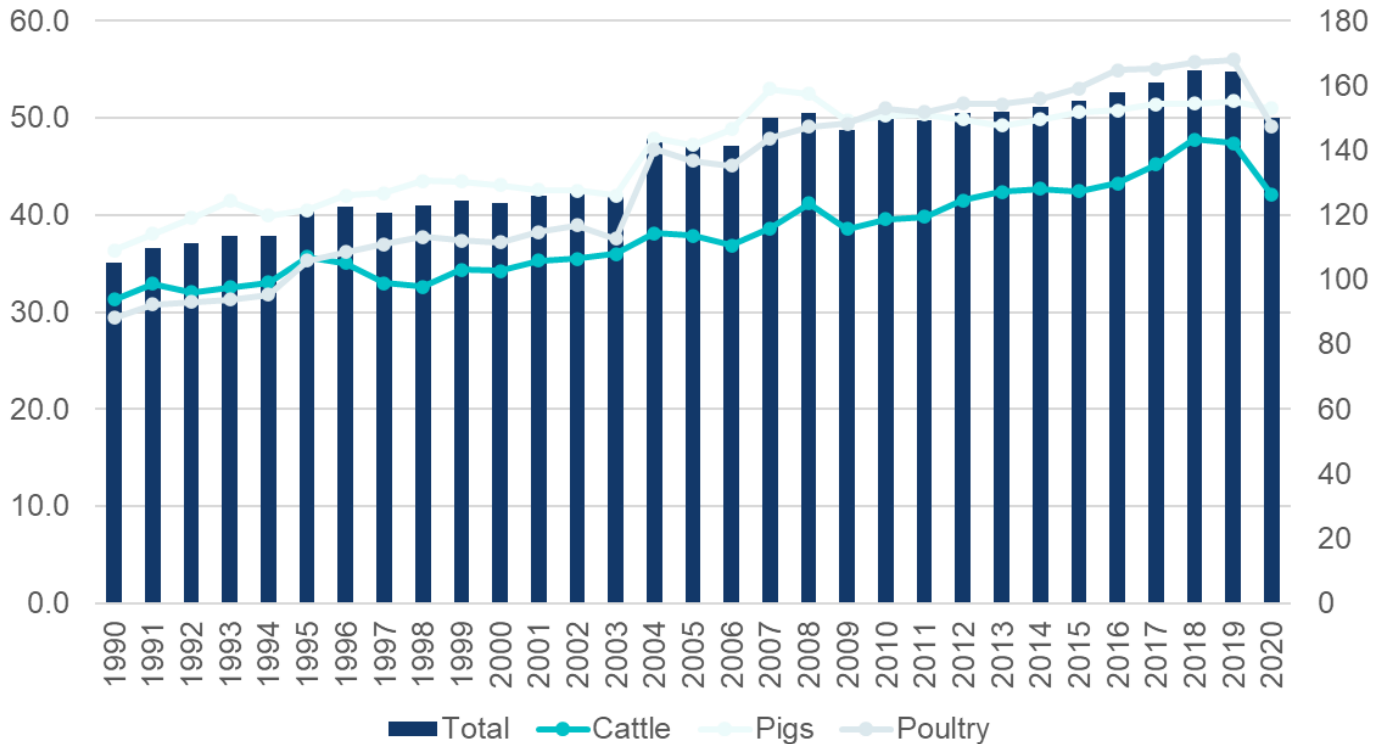
FEFAC: data per the EU as EU15 from 1994, EU25 from 2004, EU27 from 2007, EU28 from 2013, EU27 from 2020 (wherever possible), excl. EL, LU and MT.

## INTRODUCTION

This publication aims to provide an overview of the European feed sector's economic development, focusing on the feed industry role as an integral part of the EU feed and food supply chain and its contribution to the European livestock and aquaculture economy.

The industrial compound feed industry is a dynamic sector with low but steady growth over the past years, reflecting the increasing reliance of livestock and aquaculture farmers on efficient compound feed to meet high performance and quality requirements. The drop in 2020 is just a consequence of the withdrawal of the UK production from the total EU production. EU consumption of animal products remained relatively stable, while exports to 3rd countries have continued to grow.

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

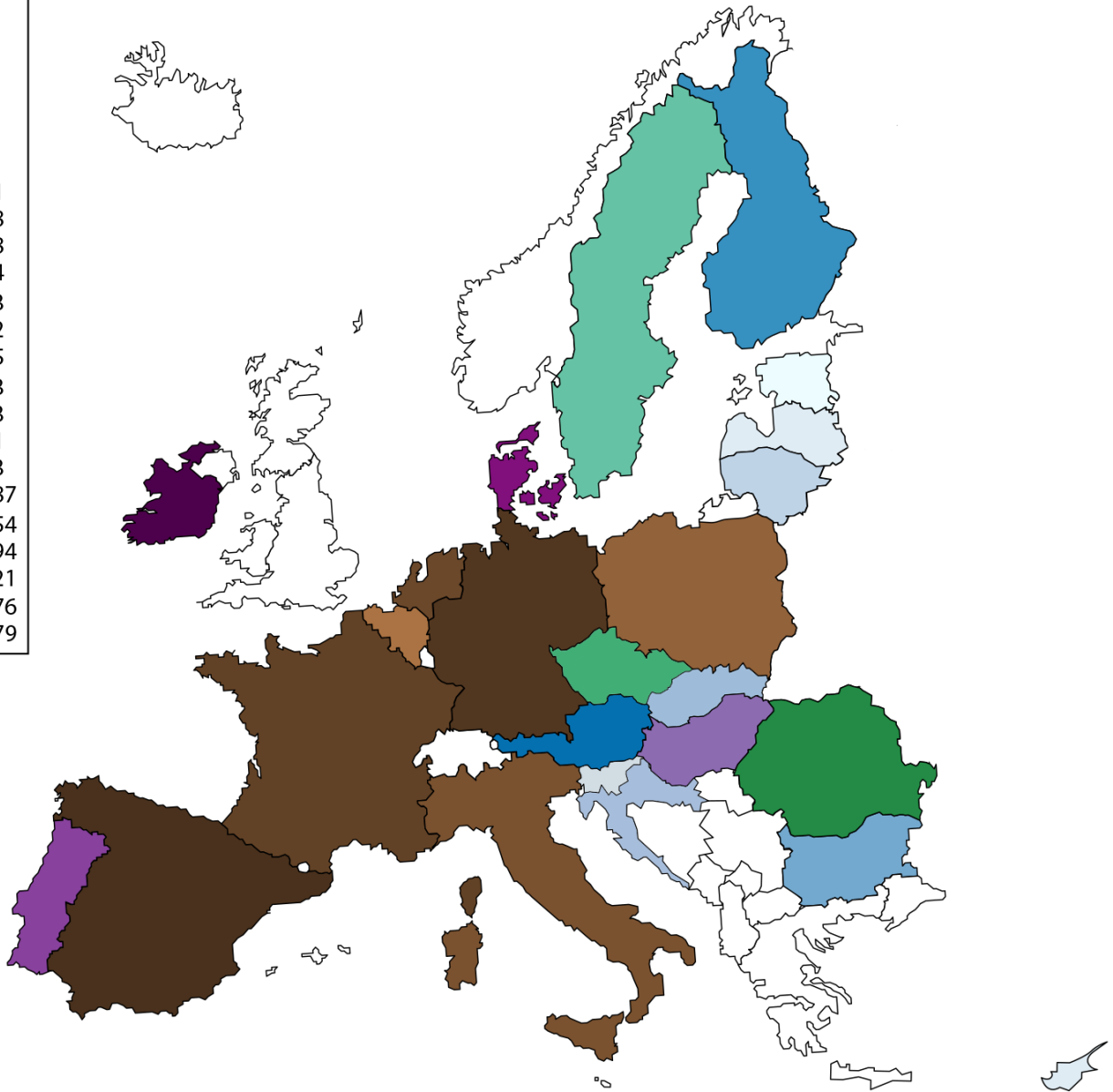


Source: FEFAC

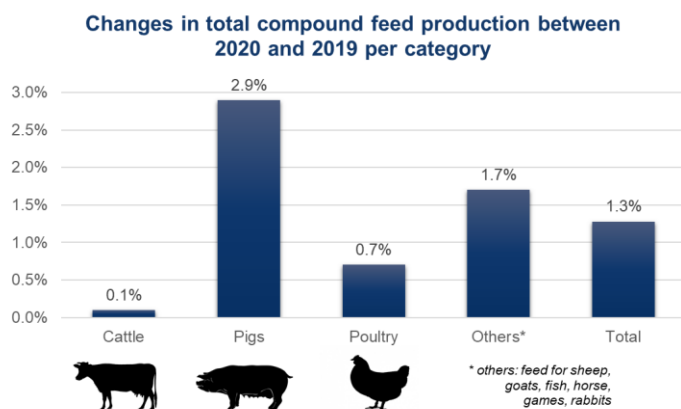
# FEED

## EU COMPOUND FEED INDUSTRY 2020 (1000 t)

EE	230
LV	346
CY	359
SI	398
LT	632
SK	664
HR	680
BU	1.181
FI	1.448
AT	1.678
SE	2.024
CZ	2.463
RO	2.792
HU	3.825
PT	4.233
DK	4.533
IE	4.741
BE	6.933
PL	11.587
IT	14.554
NL	14.694
FR	20.821
DE	23.976
ES	25.379



The compound feed production in the EU in 2020 reached 150.2 mt.<sup>1</sup>, i.e. an increase of 1.3% compared to 2019, according to data provided by FEFAC members. Despite the COVID-19 pandemic and its heavy impact on several sectors including HORECA (Hotel/Restaurant/Catering) and Tourism, the European compound feed industry managed to slightly increase its production contrary to earlier predictions. All sectors experienced production growth compared to 2019.



Source: FEFAC

In 2020, the EU poultry feed sector has seen a moderate increase in volume by only 0.7%. The production was affected mainly by two developments: the spread of Avian Influenza (HPAI) and COVID-19 lockdown measures. In 2020 the sector faced two episodes of the HPAI epidemic in Europe depressing the poultry sector. In earlier months of 2020, the disease was detected in PL, CZ, DE, SK, RO & HU while in autumn the disease hit the NL, DK, HR, FR, IR, SE, UK and again PL & DE. Next to Romania (-5.9%), one of the most affected countries was Hungary (-2.4%), where ducks and geese holdings were particularly affected. COVID-19 lockdown measures and an overall decrease in tourism had a negative effect especially in Spain where the poultry sector decreased its production by almost 5.1% compared to 2019. Overall, the poultry feed production continued to

grow mainly thanks to positive development in Belgium, Portugal, Bulgaria and Slovakia recording growth rates of more than 5%. Those are mainly countries that successfully recovered from the earlier spread of the virus in 2019 and the beginning of 2020.

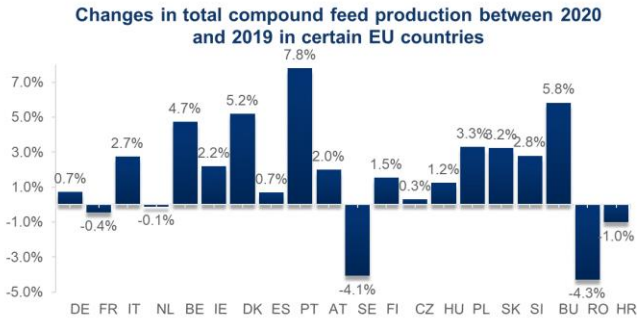
Pig feed production increased by 2.9 % in 2020, despite the continued spread of African Swine Fever (ASF) in Europe and its impact on the pig sector. This was mainly because several countries increased their exports to China benefiting from Germany's export ban. Furthermore, due to the COVID-19 problems with slaughterhouses capacity, many farm animals stayed on the farms longer than necessary, which led to higher feed consumption. Compared to young animals, finishing animals have a higher feed conversion ratio (more feed is needed to produce 1 kg of meat). The highest increases in pig feed demand were recorded in Portugal (+12.7%), Austria (+10.7%), Denmark (+9.3%), Ireland (+8.8%) and Italy (+6.2%). Romania (-4.5%) and Bulgaria (-1.6%) saw a further decline in pig feed production in 2020 following the outbreaks of ASF on commercial farms already in 2019.

Cattle feed production slightly increased by 0.1% mainly due to the indirect impact of COVID-19 and the closure of the HORECA chain (Hotel/Restaurant/Catering) that led to a shift in consumer demand for products of animal origin. However the cattle feed tonnage did not fall as initially expected due to a drier than normal spring season and poor grass growth in several countries. Such development was seen mainly in Hungary (+12.6%), Bulgaria (+8.0), Romania (+8.5%) and Belgium (+4.5%).

Bulgaria was the best-performing country, with an annual growth of +5.8% for the total compound feed production, boosted equally by the demand for cattle and poultry compound feed. Among the largest compound feed

<sup>1</sup> Figures on the production of dry pet food by compound feed manufacturers are not included in our statistics of compound feed production because they do not provide a meaningful representation of the pet food market.

producing countries (>10 Mio t.), Poland (+3.3%) and Italy increased their production (+2.7%) while Spain, Germany (+0.7%), Netherlands (-0.1%) and France (-0.4%) recorded a minor change in feed production.

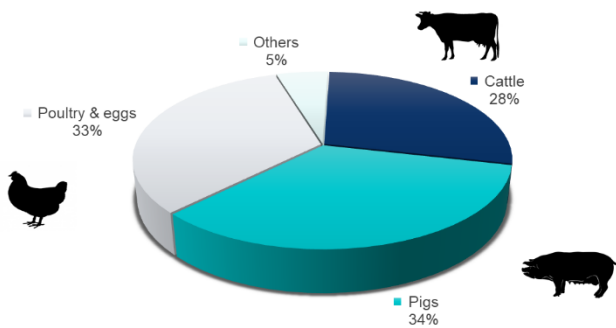


Source: FEFAC

Spain, Germany and France remain the three leading EU countries in terms of total compound feed production. Spain is the leading cattle and pig feed producer while France maintains its leading position as poultry feed producer.

With the UK leaving the EU in 2020, poultry feed production lost its position as the leading segment of EU-27 industrial compound feed production to pig feed.

Industrial compound feed production in EU per category in 2020, 150.2 mt.



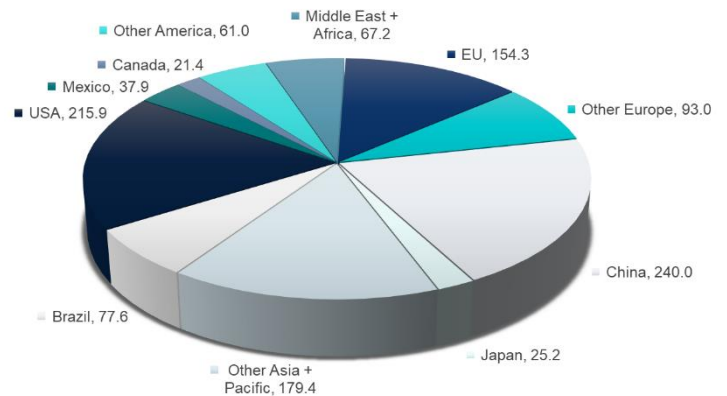
Source: FEFAC

The compound feed industry has become even more capital intensive in recent years making increasingly use of technological advancement to improve its efficiency and sustainability performance. Advanced methods are used to formulate feeds according to the demands of the

livestock farmer including footprinting information– which reflects final consumers’ demand– and to control the feed materials used, the manufacturing process and the quality of the finished feeds. The compound feed industry is subject to a complex body of both EU and national legislation affecting almost every part of its operation. This legislation is designed to ensure that feeds are of high quality and are safe for both livestock and consumers of animal products.

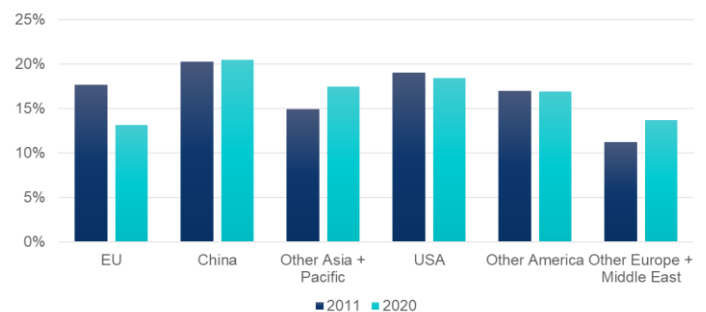
The EU-27 compound feed production represents 13% of the global production that is estimated at around 1,172 mt. progressing by 5.5% vs. 2018. The global market share of the EU declined by 2% mainly because of increased feed production in Asia over the past decade.

Global compound feed production in 2020 (1172.7 mt.)



Source: FEFAC based on Alltech

Market share change 2011/2020



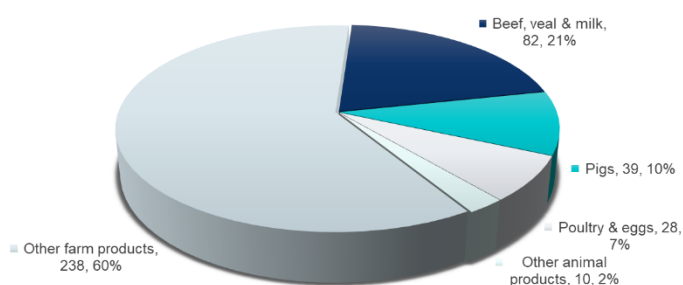
Source: FEFAC based on Alltech



## FEEDING EU LIVESTOCK

The value of livestock production – amounting to €151 billion – accounts for 41% of the total value of farm production. More than half of its amount (82 bio €) is then created by beef & veal, and dairy animal products, followed by pigs, poultry & eggs and other animal products (i.e. sheep, goats, etc.). The overall EU-27 agricultural output production was €389 billion in 2020.

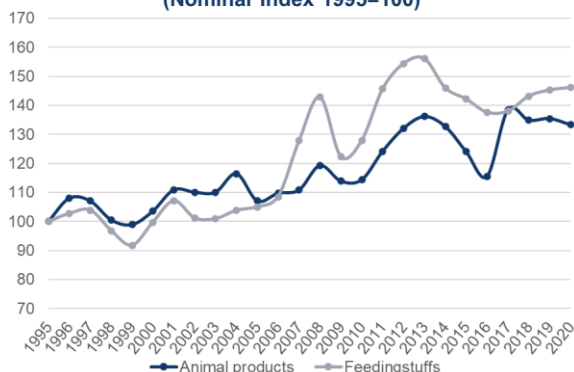
Value of farm production in 2020 in the EU (bio. €)



Source: FEFAC based on Eurostat

Feed costs have increased more than producer prices over the last 25 years, confirming a general trend of permanent pressure on livestock farmers to improve their productivity and on compound feed producers to deliver efficient compound feed.

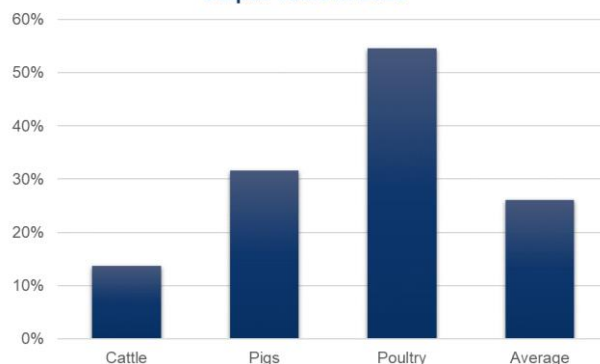
Comparison between producer prices for animal products and feedingstuff prices (Nominal Index 1995=100)



Source: FEFAC based on Eurostat

Animal feed is the most important livestock production cost factor and represented in 2020 up to 55% of the farm gate value of poultry, 32% of the farm gate value of pigs and 14% of the farm gate value of cattle.

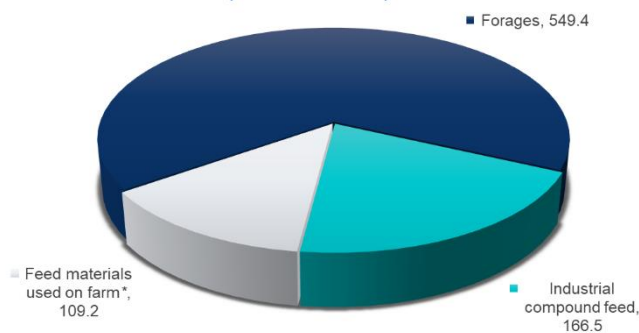
Value of purchased compound feed in total animal output value in 2020



Source: FEFAC based on Eurostat

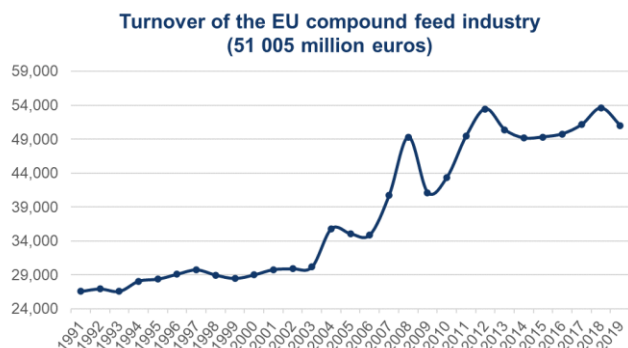
The EU+UK farm animals are fed with the app. 827 mt. of feed, including feed materials and compound feeds. Out of this quantity, 549 mt. are roughage of farm origin. The resulting balance, i.e. 278 mt. of feedstuffs consumed, includes cereals grown and used on the farm of origin & feed purchased by livestock producers to supplement their feed resources (either feed materials or compound feed). It is estimated that up to 109 mt. of feed materials are used on the farm. As for compound feed, 167 mt. was produced in 2020 (EU+UK). This volume accounts for 20% of the total feed basket.

Livestock sourcing in feed in the EU+UK (827 mt. in 2020)



Source: FEFAC based on Eurostat

Turnover of the EU-27 industrial compound feed industry was 51 billion euros in 2019. In five years the turnover increased by 22%.



Source: FEFAC

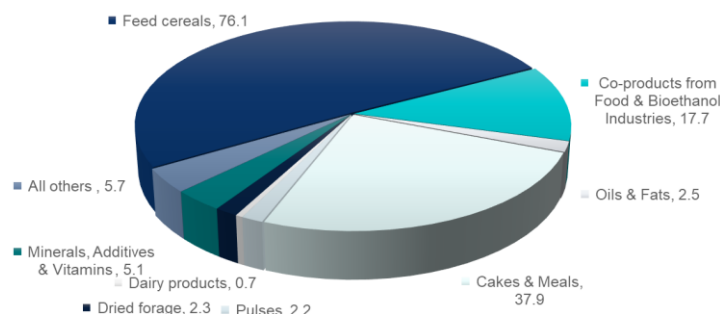
## CONSUMPTION OF FEED MATERIALS

Feed formulators' role and expertise consists of producing a feed that will fulfil animal nutritional requirements to support its best performance.

To achieve that, a mixture of feed materials is chosen in the most efficient way to manufacture a compound feed. Next to the cost factor, the availability of feed materials plays an important role in the production process. Feed materials are primarily from EU origin: cereals, pulses and co-products from the food and bioethanol industries. However, some feed materials are imported from Third Countries, in particular feed materials rich in proteins like soybean meal as they are not produced in sufficient quantities within the EU. These diverse sources of feed material supplies are an important factor in the industry's ability to manufacture feeds of both high quality and at competitive prices for livestock farmers.

In 2020, the EU-27 compound feed industry produced 150.2 mt. of feed, consuming 76 mt. of feed cereals, 37.9 mt. of cakes and meals, 17.7 mt. of co-products from food & bioethanol industries, 5.1 mt. of minerals, additives & vitamins, 2.5 mt. of oils & fats, 2.3 mt. of dried forage, 2.2 mt. of pulses and 5.7 mt. t. of all other feed materials (e.g. former foodstuffs, straw, microbial biomass, etc.).

**EU-27 Feed material consumption by the compound feed industry in 2020 150,2 mio t.**



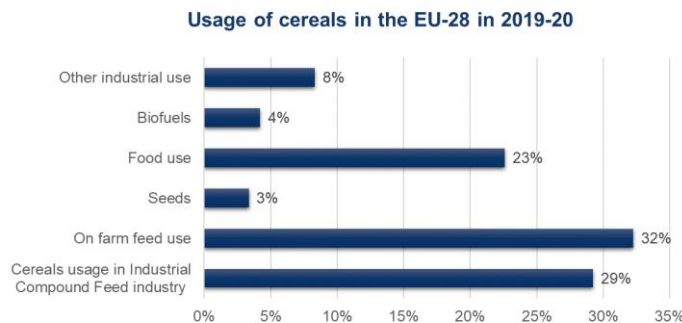
Source: FEFAC

Over the last 10 years, the total consumption of feed materials slightly increased (+11%) in line with the increase in industrial compound feed production. The proportion of the main categories of feed cereals (50%) and co-products of the food and bioethanol industry (12%) remained stable. On the other hand, a decreasing trend can be recorded in the consumption of oilseed meals due in particular to a trend to further reduce the levels of crude proteins in feed for farmed animals and animal



meals. The usage of processed animal proteins (PAPs) in compound feed went down by 70% in the past 20 years following the BSE crisis and the ban of its feed use for most species in the EU in 2001. The downtrend has not been reversed since then even though non-ruminant PAPs (2013) and insect meal could be legally used again in aquafeeds as of 2013 & 2017. PAPs are one of the home grown feed material sources that can contribute to increase EU protein self-sufficiency and decrease dependency on the import of protein-rich feed materials. The EU re-authorised the usage of porcine PAP in poultry feed, avian PAP in pig feed and insect PAP in both pig and poultry feed in August 2021. However, usage in the compound feed industry will most likely remain rather modest, due to stringent technical requirements, which allow its use only in fully dedicated “single species” feed mills.

The livestock is the most important outlet for EU+UK produced cereals with 61% of the internal usage. Up to 32% of cereals consumed in the EU+UK are directly used by farmers to feed their animals. In addition, 29% of cereals are used by the industrial compound feed industry. The food industry represented 23% of internal uses, followed by industrial use (14%) and seeds (3%).



Source: FEFAC based on DG AGRI market balance sheets

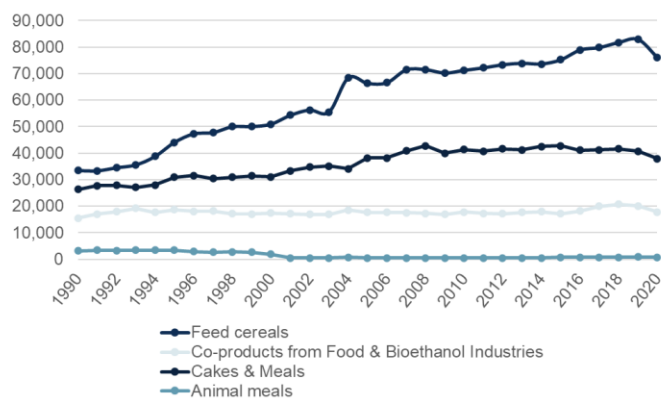
In the feed sector, it is important to distinguish different protein sources based on protein content:

- “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 EU has low self-sufficiency in high protein feed sources (e.g. oilseed meals):, 28 % on average (11/12 - 19/20). For other categories of protein feed materials, the self-sufficiency ratio is high: 97% for low-protein feed sources, 88% for medium-protein feed sources and 87% for super-protein feed sources. During the first years of the last decade, the total EU self-sufficiency in protein-rich feed materials continued to grow thanks to the expansion of the biofuel industry and the generation of co-products rich in proteins like Dried Distillers’ Grains and Solubles (DDGS), and rapeseed meal. However, the recent data show that the growing trend is stagnating. This might be due to several reasons: lower demand for biofuels in the ‘green investments’ scenario leading to

Product of animal origin	Feed for food producing animals					feed for pets and fur animal
	Ruminant	Pig	Poultry	Fish	Other	
Ruminant PAP, including ruminant blood meal	Red	Red	Red	Red	Red	Green
Blood products from ruminants	Red	Red	Red	Red	Red	Green
Hydrolysed proteins from ruminants tissues other than hides and skins	Red	Red	Red	Red	Red	Green
Non-ruminant PAP, including non-ruminant blood meal but excluding fishmeal, porcine PAP and poultry PAP	Red	Red	Red	Red	Red	Green
Porcine PAP	Red	Red	Green (2021)	Green (2013)	Green (2013)	Green
Poultry PAP	Red	Red	Green (2021)	Green (2017)	Green (2017)	Green
Insect PAP	Red	Red	Green (2021)	Green (2021)	Green (2021)	Green
Gelatine and collagen from ruminants	Red	Red	Green (2021)	Green (2021)	Green (2021)	Green
Fishmeal	Red	Red	Red	Red	Red	Green
Blood products from non-ruminants	Red	Red	Red	Red	Red	Green
Di and tricalcium other than those mentioned elsewhere in the table	Red	Red	Red	Red	Red	Green
Hydrolysed proteins from non-ruminants or from ruminant hides and skins	Green	Green	Green	Green	Green	Green
Gelatine and collagen from non-ruminants	Green	Green	Green	Green	Green	Green
Egg, egg products, milk, milk products, colostrum	Green	Green	Green	Green	Green	Green

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



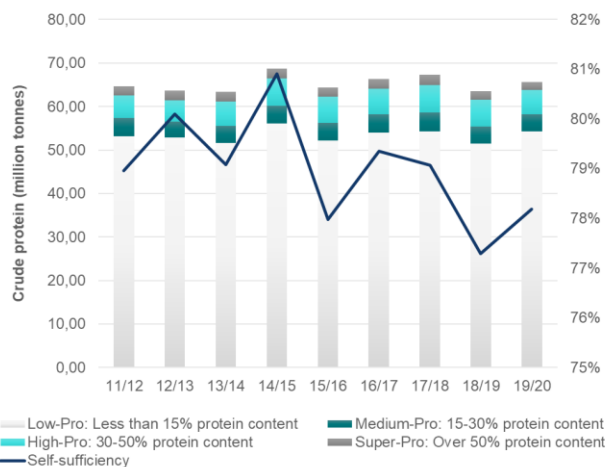
Source: FEFAC



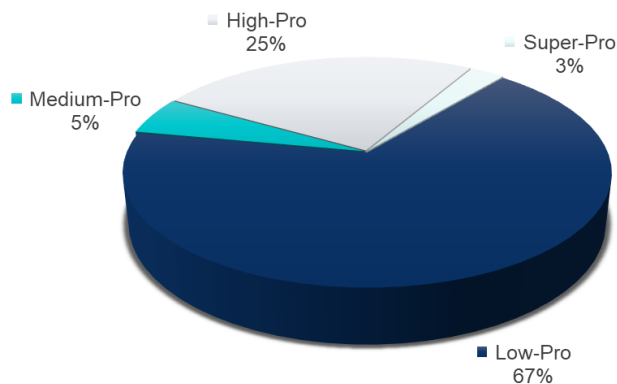
lower production of biodiesel, redirection of subsidies to 'advanced' biofuels.

(67%), followed by the high protein category (25%), medium-protein category (5%) and super-protein category (3%).

EU self-sufficiency in protein sources



Share of protein sources in EU+UK 2019/20 (84 mt. of crude protein)



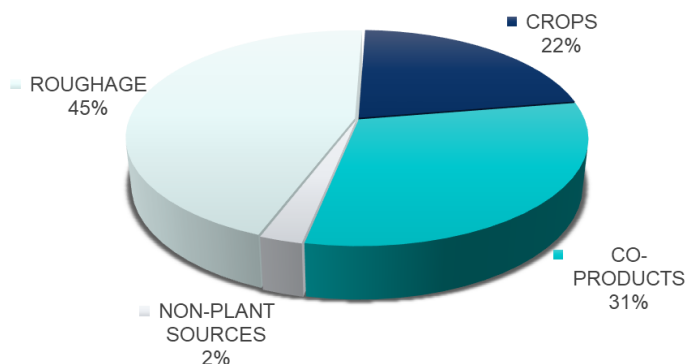
Source: FEFAC based on EU+UK feed protein balance sheets

Source: FEFAC based on EU+UK feed protein balance sheet 2019/20

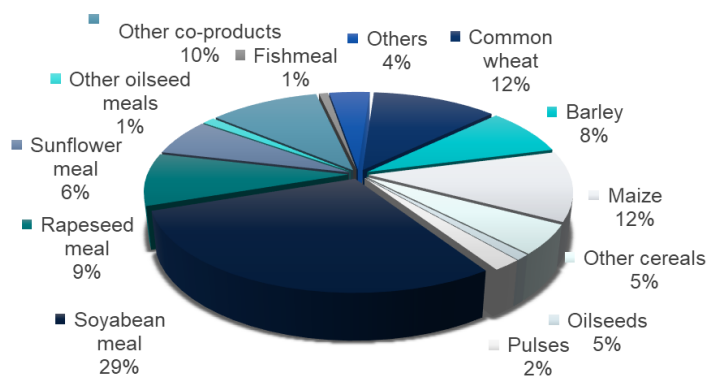
Roughage, especially grass, is the most important source of proteins (45% of the supply, expressed in protein equivalent) for the EU livestock sector, followed by co-products (31%), crops (22%) and non-plant sources (2%) such as whey powder, processed animal proteins and former foodstuffs.

With roughage excluded, up to 45% of the protein supply comes from oilseed meals, 37% from mainly EU produced cereals and 10% from co-products (i.e. molasses, beet pulp pellets, starch industry protein products, distiller dried grains with soluble etc.).

Share of protein sources in EU+UK 2019-2020 (84 mt. of crude protein)



Sources of proteins for feed use in the EU+UK in 2019/20



Source: FEFAC based on EU+UK feed protein balance sheet 2019/20

FEFAC based on EU+UK feed protein balance sheet 2019/20

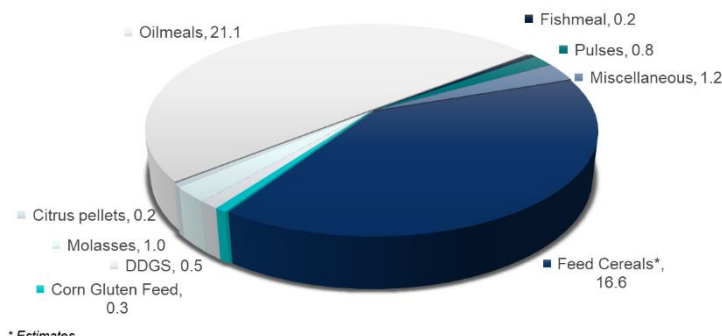
In other words, the low-protein category is the largest contributor to the feed protein basket

The richest feed protein sources are potato proteins (>70%) and fish meal (65%). Cereals, although low in proteins (11%) represent altogether 20% of the protein supply. Processed

animal protein contains 62% of protein but its usage is limited due to (1) market acceptance (2) legal requirements (single species feed mills) (3) availability and competitiveness among species. Economically and nutritionally, oilseed meals are one of the best protein sources to be used in feed both in terms of concentration in proteins (16 to 45.5% depending on the oilseed) and quality (amino acid profile). Altogether, oilseed meals account for 25% of the protein supply, against 6% for other co-products, such as DDGS, maize gluten feed, etc.

feed (0.3 mt.), citrus pellets (0.2 mt.), pulses (0.8 mt.), fishmeal (0.2 mt.) and then other feed materials (1.2 mt.).

Imports of feed materials in the EU-27 in 2020: 42 mt.

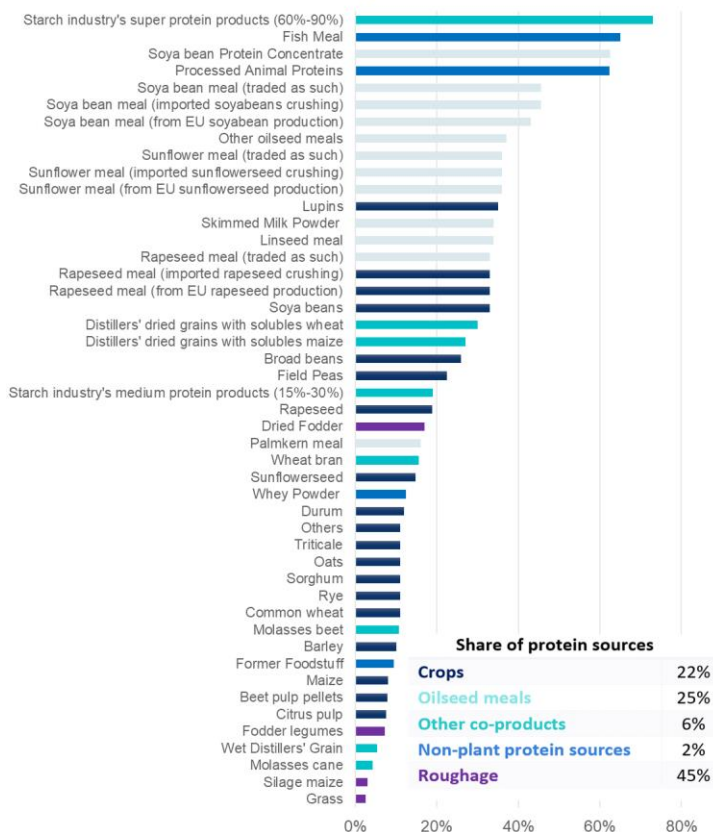


\* Estimates

Source: FEFAC based on Eurostat

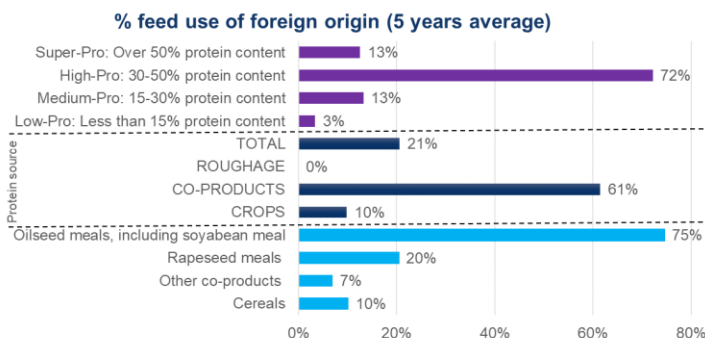
The EU+UK are mostly dependent (72%) on the import of high protein content feed sources (30-50% protein content), mainly co-products (61%) sourced from Third Countries from crops not grown significantly in the EU, i.e. soybean meal linseed meal, palm kernel expeller, etc. (75%). Rapeseed meal is the only meal the EU+UK is not significantly dependent on imports. This is mainly due to the EU biofuel policy, e.g. the renewable energy directive (RED) in 2009, providing incentives to biofuels production and leading to increased production of rapeseed meal. Overall, total feed proteins dependency is relatively low 21%. In other words, 79 % of total feed proteins are produced within the EU. Roughage is the only feed protein source for which the EU is 100% self-sufficient. The EU is also almost self-sufficient (93%) in other co-products (DDGS, wheat bran, beet pulp pellets etc.) and cereals production (90%).

Feed sources - protein content



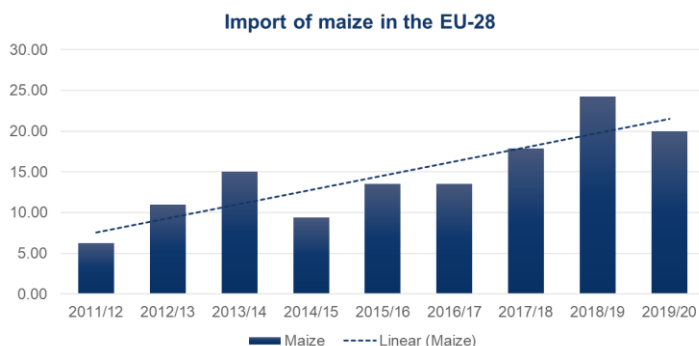
Source: FEFAC based on the EU+UK feed protein balance sheets

In 2020, the EU-27 imported up to 42 mt. of feed materials mainly oilseed meals (21.1 mt.), thereof soybean meal (16.3 mt.) and feed cereals (16.6 mt.), most of it being maize (14 mt.). In smaller amounts, the EU sourced molasses (1.0 mt.), DDGS (0.5 mt.), corn gluten



Source: FEFAC based on EU+UK feed protein balance sheets

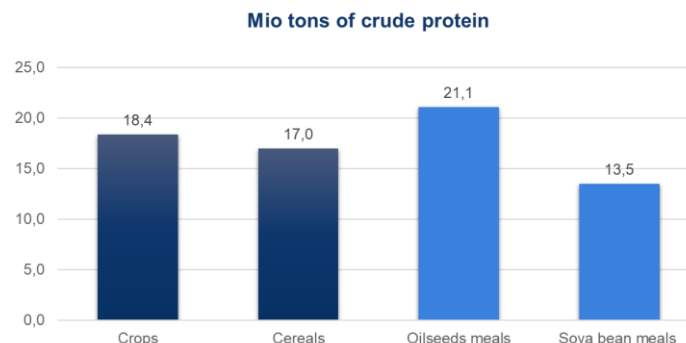
For several years the EU+UK were almost self-sufficient in cereals production (90%). However, as the below graph shows the upward trend in the import of maize might increase dependency also in this category.



Source: FEFAC based on EU+UK feed protein balance sheets

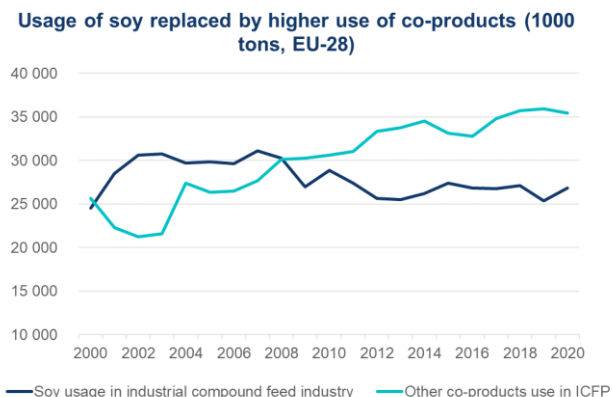
There is limited interchangeability between the proteins from different vegetable protein sources, mainly due to diverse amino acids composition. Thus, soybean meal and other high-protein content feed materials (30 – 50 %) is so valued from an animal nutrition point of view, as it provides the ideal amino-acid profile. However, the contribution of cereals to the protein supply should not be underestimated. The below figure shows that in 2019/20, the cereals provided 17 mt. of crude protein (18,4

mt. all crops) vs. 13.3 mt. for soybean meals (21.2 mt. all oilseed meals).



Source: FEFAC based on EU+UK feed protein balance sheet 2019/20

It is important to note that co-products from the food industry play an important role in replacing soy usage which has been on a downward trend since 2008.



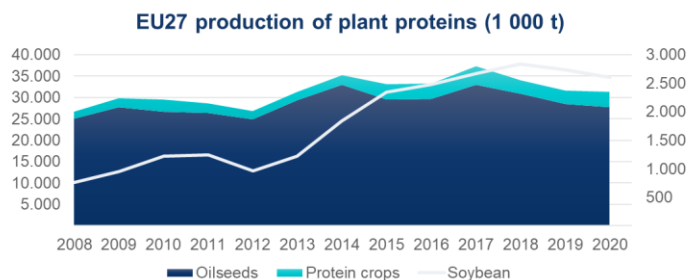
Source: FEFAC based on its own and FEDIOL data

In 2018, the European Commission published a report on the development of plant proteins in the European Union<sup>2</sup>, analysing the EU plant protein sector and showing its dynamic development in recent years. The soybean is recorded to be the most successful home grown oilseed plant when the production has more than tripled since 2008 (from 0.76 mt. to 2.6 mt.

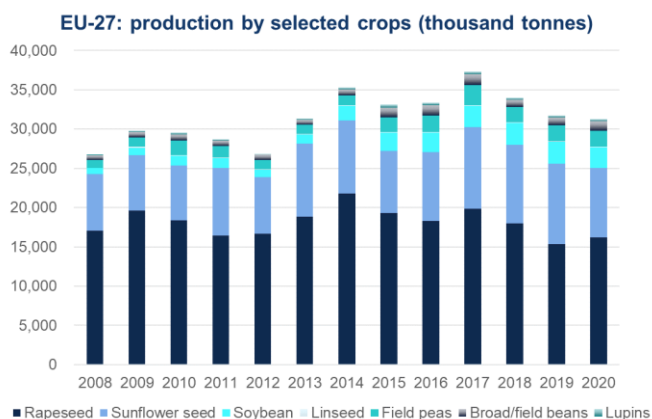
<sup>2</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52018DC0757>



in 2020). As for protein crops, the broad/field beans production grew the most in the same period (from 0.58 mt. to 1.3 mt. in 2020).



Source: FEFAC based on DG AGRI’s data on Oilseeds and protein crops statistics



Source: FEFAC based on DG AGRI’s data on oilseeds and protein crops statistics

According to the European Commission, the increase in plant protein production in the EU during recent years is not only thanks to food segments demand but also premium feed. JRC<sup>3</sup> estimated that up to 11% of total feed in the EU+UK in 2012 was marketed as “non-GM”. According to the FEFAC internal survey, the

production of such feed continued to rise over the past years up to 15% in 2020. Strong demand for non-GMO animal products is coming mainly from Germany. However, the upward trend has been depressed during the COVID-19 pandemic, when it was very difficult to source “non-GM” protein sources outside the EU. In some Member States and some cases, market partners moved away from this market and transferred their interest towards certified/verified responsibly-produced protein sources (soy products).

As for 2020, the data shows that the cattle sector, especially dairy, leads the non-GM free production.

Share of non-GM feed in selected Member states			
Member State	Poultry	Pork	Cattle
Germany	75-80%	<5%	70% (only dairy)
Hungary	10%	11%	9%
France	15%	20%	20%
Sweden*	100%	100%	100%
Austria	100%	<10%	100%
Poland	<5%	<5%	70-75%
Denmark	5-10%	<5%	25%
Belgium	<5%	<1%	15%
Finland	30%	50%	100%
The Netherlands	<2%	<1%	15-20%
Italy	35%	5%	15%
Romania	1%	2%	10%
Slovenia	8.0%	5.0%	55.0%
No supply of "non-GM" feed	PT, ES, BG, IE		

\*excluding home mixing

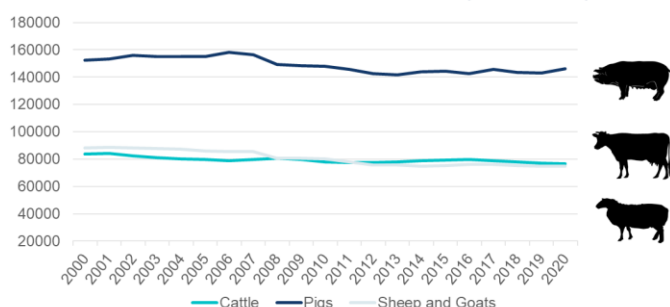
Source: FEFAC

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<https://publications.jrc.ec.europa.eu/repository/bitstream/JRC95457/report.pdf>

# FOOD

The market for feedingstuffs depends on the market for livestock products. In 2020, the livestock population numbers continued to decrease in the EU-27. Compared to the previous year, the population of cattle decreased by 1.9 %, pigs by 1.1 % and sheep & goats by 0.1%.

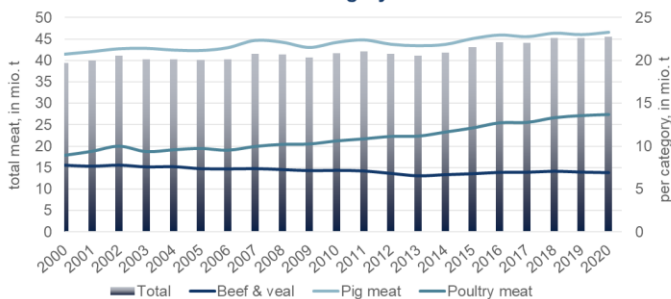
Evolution of EU-27 livestock population (1,000 heads)



Source: FEFAC based on DG AGRI's data (Short-term outlook - autumn 2021)

In 2020, the production of meat in the EU-27 slightly decreased by 0.9 % to a total of 45.5 mt. (carcass weight) compared to last year. Pig meat production grew by 1.2 % (23.3 mt.), poultry production by 0.9 % (13.6 mt.) while beef & veal and sheep & goat production decreased respectively by 0.9 % (6.9 mt.), and 2.9 % (0.57 mt.).

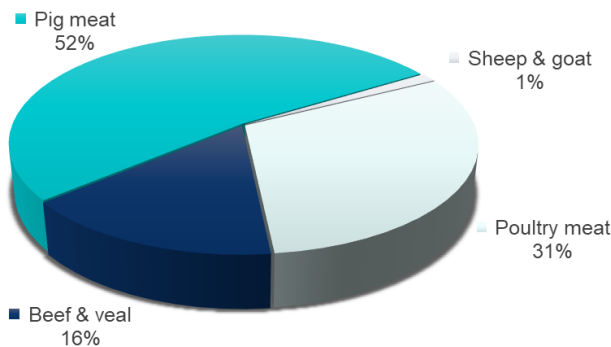
Gross meat production development in the EU-27 per category



Source: FEFAC based on DG AGRI's data (Short-term outlook - autumn 2021)

52% of the EU-27 meat production is pig meat. Poultry comes second with 31% share, followed by beef & veal (16%) and sheep & goat meat (1%).

Breakdown of meat production per livestock class in the EU-27 (2020)

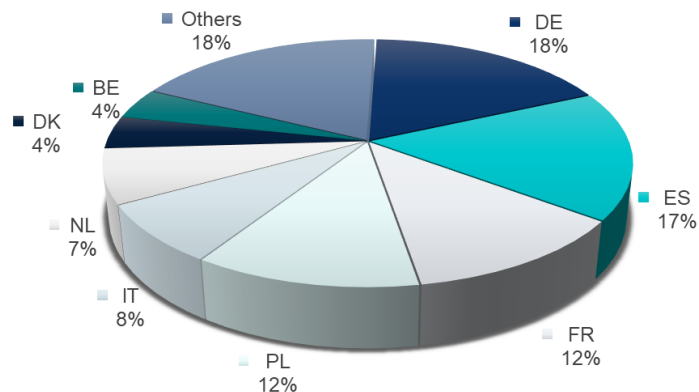


Source: DG AGRI

Source: FEFAC based on DG AGRI's data (Short-term outlook - autumn 2021)

Germany, with its share of 18% (7.8 mt.), is the EU-27 leading meat producing country, followed by Spain (17%, 7.5 mt.). The third place belongs to France (5.3 mt.) and fourth to Poland (5.2 mt.). Italy (8%, 3.4 mt.), the Netherlands (7%, 3.1 mt.), Denmark (4%, 1.8 mt.) and Belgium (4%, 1.8 mt.) are also important meat producers in the EU-27.

Leading meat producing countries in the EU-27 (2020)



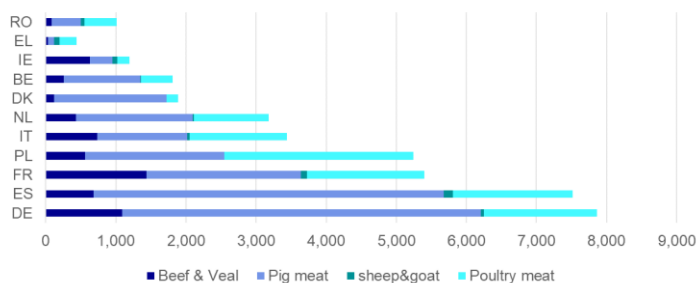




Source: FEFAC based on DG AGRI's data (Short-term outlook - autumn 2021)

In 2020, Germany was the EU-27 leading country in pig meat production (5.1 mt.), followed by Spain (5.0 mt.) and France (2.2 mt.). Poland, with its 2.7 mt., was the biggest producer of poultry meat, followed by Spain (1.7 mt.) and France (1.7 mt.). France produced 1.4 mt. of beef & veal meat and as such became the leading EU-27 producing country in this sector, followed by Germany with 1.1 mt. and Italy 0.7 mt. Spain was the biggest producer of sheep and goat meat (0.125 mt.), followed by France (0.086 mt.), Greece (0.084 mt.), Ireland (0.066 mt.) and Romania (0.055 mt.).

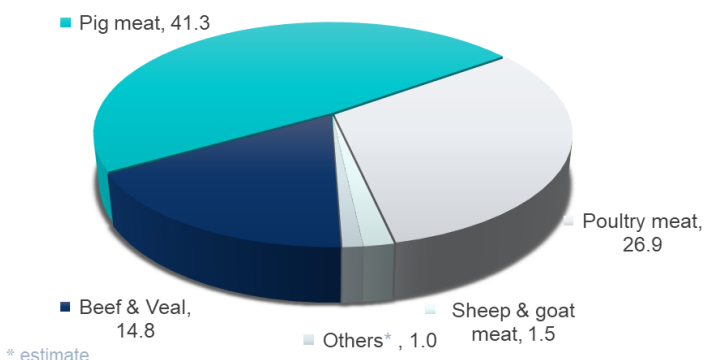
**Leading meat producing countries per category in the EU-27 (2020, 1,000 t)**



Source: FEFAC based on DG AGRI's data (Short-term outlook - autumn 2021)

Pig meat is the most consumed meat in the EU-27 with 41.3 kg/capita/year in 2020, followed by poultry meat with 26.9 kg/capita/year and 14.8 kg/capita/year for beef & veal.

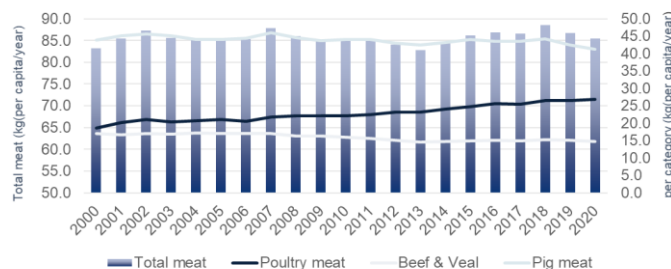
**Meat consumption in the EU-27 per category (kg/per capita/year)**



Source: FEFAC based on DG AGRI's data (Short-term outlook - autumn 2021)

The average per capita consumption of total meat (including horse meat, rabbits and offals) in 2020 was at 85.5 kg, which was 1.5 kilograms less compared to the previous year. Compared to the year 2019, consumption decreased for beef & veal meat (-0.4 kg), pig meat (-1.1 kg) and sheep & goat meat (-0.1 kg). The EU citizens slightly increased meat consumption only in poultry meat (+0.3kg).

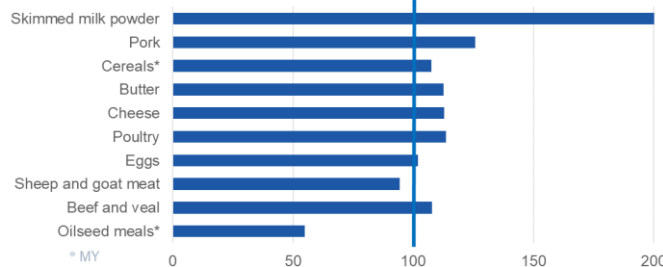
**Meat consumption development in the EU-27 per category (kg/per capita/year)**



Source: FEFAC based on DG AGRI's data (Short-term outlook - autumn 2021)

The EU is self-sufficient in livestock products in volumes, in particular pig meat and dairy products. Despite the COVID-19 pandemic in 2020, the EU-27 managed to remain the largest global exporter of agri-food products. The EU-27 became the third biggest importer of agri-food in 2020. The EU-27 is not self-sufficient in oilseed meals & sheep and goat meat production.

**EU-27 self-sufficiency for some EU agricultural products in 2020 (in %)**



Source: FEFAC based on DG AGRI's data (market outlets)

## STATISTICAL ANNEX

Table 1: EU industrial compound feed production (1 000 t)

	CATTLE			PIGS			POULTRY			TOTAL**		
	2019	2020	%	2019	2020	%	2019	2020	%	2019	2020	%
DE	7,068	6,918	-2.1	9,576	9,843	2.8	6,392	6,459	1.0	23,802	23,976	0.7
FR	5,457	5,424	-0.6	4,963	4,959	-0.1	8,645	8,607	-0.4	20,914	20,821	-0.4
IT	3,377	3,435	1.7	3,745	3,977	6.2	5,975	6,070	1.6	14,165	14,554	2.7
NL	4,502	4,500	0.0	5,029	4,917	-2.2	4,045	4,119	1.8	14,710	14,694	-0.1
BE	1,447	1,512	4.5	3,504	3,639	3.9	1,220	1,303	6.8	6,619	6,933	4.7
IE	3,116	3,120	0.1	706	768	8.8	631	651	3.2	4,640	4,741	2.2
DK	1,071	1,067	-0.4	2,362	2,582	9.3	677	696	2.8	4,309	4,533	5.2
ES	9,489	9,540	0.5	11,054	11,430	3.4	4,478	4,249	-5.1	25,203	25,379	0.7
PT	983	1,007	2.4	1,074	1,210	12.7	1,638	1,767	7.9	3,927	4,233	7.8
AT	605	611	1.0	252	279	10.7	651	661	1.5	1,645	1,678	2.0
SE	981	913	-6.9	341	323	-5.3	718	717	-0.1	2,110	2,024	-4.1
FI	693	703	1.4	222	230	3.6	385	390	1.3	1,426	1,448	1.5
CY	200	180	-10.0	5	5	-6.0	42	37	-11.9	387	359	-7.3
CZ	563	570	1.2	759	761	0.3	1,062	1,044	-1.7	2,456	2,463	0.3
EE	40	40	0.0	140	140	0.0	48	48	0.0	230	230	0.0
HU	380	428	12.6	1,342	1,399	4.2	1,913	1,868	-2.4	3,778	3,825	1.2
LV	64	64	0.0	66	66	0.0	202	202	0.0	346	346	0.0
LT	152	152	0.0	28	28	0.0	275	275	0.0	632	632	0.0
PL	1,227	1,255	2.3	2,417	2,495	3.2	6,905	7,114	3.0	11,217	11,587	3.3
SK	188	195	3.8	245	248	1.1	198	207	4.9	643	664	3.2
SI	84	87	3.7	43	43	1.0	246	255	3.5	387	398	2.8
BU	176	190	8.0	322	317	-1.6	565	603	6.7	1,116	1,181	5.8
RO	80	87	8.5	1,100	1,050	-4.5	1,615	1,520	-5.9	2,917	2,792	-4.3
HR	113	95	-15.9	265	270	1.9	293	300	2.4	687	680	-1.0
EU *	42,056	42,093	0.1	49,560	50,978	2.9	48,819	49,162	0.7	148,266	150,170	1.3

\* Without Luxemburg, Greece and Malta

\*\* including milk replacers and feed for other animal species (goats, sheep, fish, games, rabbits, horses)

Table 2: EU compound feed production (million t)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total	149.6	149.2	151.4	151.8	153.4	155.3	158.0	161.0	164.6	164.4	150.2
Cattle	39.6	39.8	41.5	42.4	42.7	42.4	43.3	45.2	47.8	47.4	42.1
Pigs	50.2	50.4	49.8	49.2	49.9	50.6	50.8	51.4	51.5	51.7	51.0
Poultry	50.9	50.6	51.4	51.4	52.0	53.0	54.9	55.1	55.7	56.0	49.2

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

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
<b>Turnover</b>	49321	41130	43372	49470	53460	50395	49165	49329	49779	51143	53587	51005

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

EU	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
<b>Feed cereals</b>	71,259	72,194	73,368	73,914	73,666	75,229	78,907	79,838	81,752	82,911	76,078
<b>Tapioca</b>	0	0	0	22	2	4	0	0	0	0	0
<b>Co-products from Food &amp; Bioethanol Industries</b>	17,758	17,352	17,108	17,665	17,928	17,224	18,132	19,925	20,690	20,080	17,746
<b>Oils &amp; Fats</b>	2,669	2,655	2,568	2,579	2,852	3,005	2,726	2,796	2,856	2,806	2,463
<b>Cakes &amp; Meals</b>	41,416	40,759	41,590	41,307	42,487	42,813	41,068	41,204	41,632	40,694	37,884
<b>Animal meals</b>	468	473	459	455	441	698	698	736	780	800	695
<b>Dairy products</b>	1,154	1,249	1,248	1,229	1,237	963	713	713	713	714	727
<b>Dried forage</b>	2,300	2,081	2,075	2,055	2,315	2,108	2,121	2,110	2,178	2,232	2,306
<b>Pulses</b>	2,012	1,905	1,759	2,071	1,915	1,983	2,230	2,228	2,300	2,161	2,185
<b>Minerals, Additives &amp; Vitamins</b>	4,433	4,351	4,408	4,326	4,696	4,910	5,337	5,528	5,647	5,603	5,076
<b>All others</b>	6,094	6,184	6,781	6,127	5,833	6,330	6,047	5,970	6,058	6,416	5,010

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## Active members

Organisation	Country	Member since
VFÖ	Austria	1995 (1964)
BFA	Belgium	1959
BFMA	Bulgaria	2013
CAFM	Cyprus	2004 (2003)
SKK	Czech Republic	2004 (2000)
DAKOFO	Denmark	1973
FFDIF	Finland	1995 (1993)
EUROFAC*	France	1959
DVT	Germany	1959
HGFA	Hungary	2012
IGFA	Ireland	1973
ASSALZOO	Italy	1959
LGPA	Lithuania	2005
NEVEDI	The Netherlands	1959
IZP	Poland	2004 (2001)
IACA	Portugal	1986 (1976)
ANFNC	Romania	2014
AFPWTC	Slovakia	2004 (2003)
GZS	Slovenia	2004
CESFAC	Spain	1986
FS	Sweden	1995

## Observer members

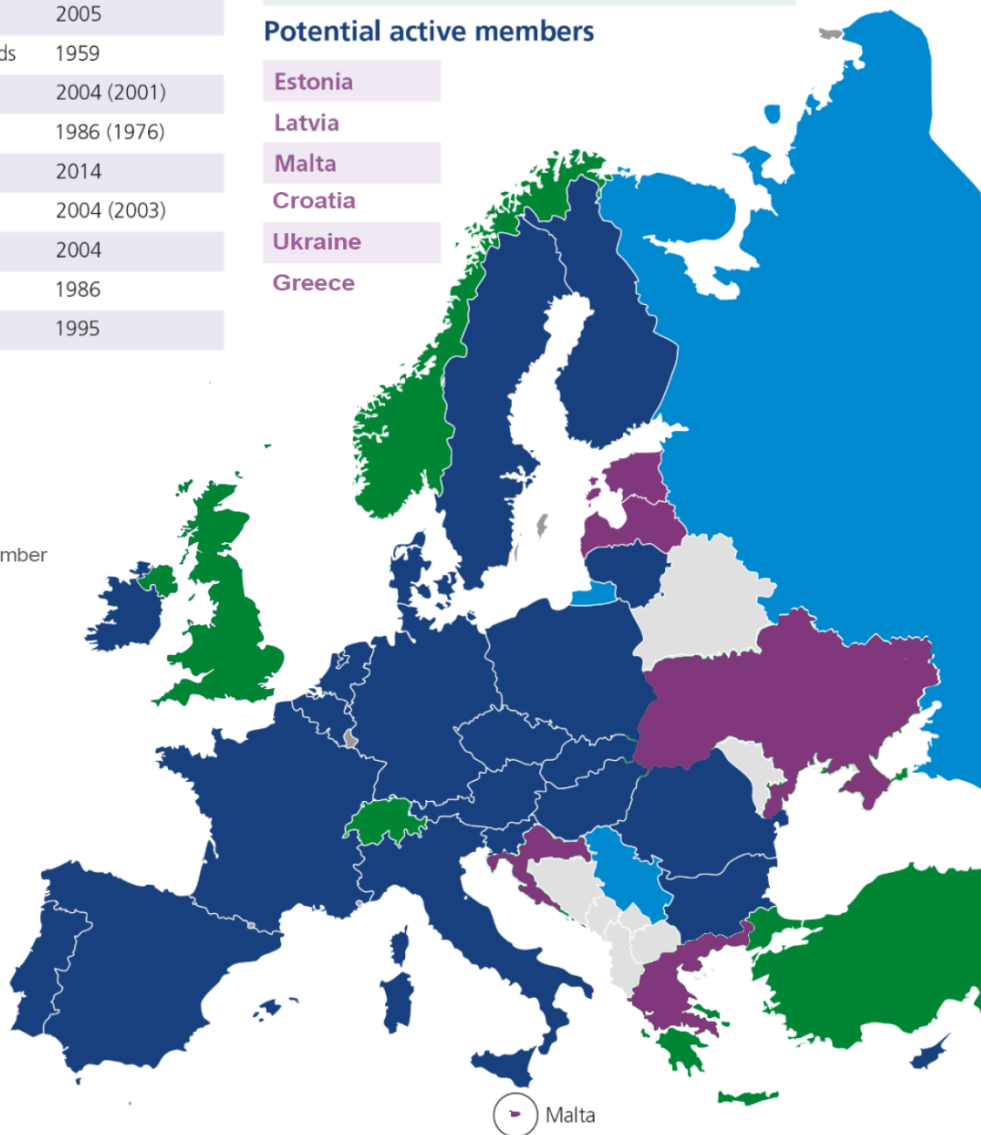
Organisation	Country	Member since
RUFM	Russia	2010
SFMA	Serbia	2009

## Associate members

Organisation	Country	Member since
EFFPA		2014
EMFEMA		2003
NSF	Norway	2003
FKF AS	Norway	2014
AIC	United Kingdom	1973
VSF	Switzerland	1966
TURKIYEM	Turkey	2014 (2005)

## Potential active members

- Estonia
- Latvia
- Malta
- Croatia
- Ukraine
- Greece




\*EUROFAC took over from SNIA in 2016  
Dates in brackets indicate 'Observer from'

Information corrected as of 1 December 2021



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