The compound feed industry in the EU livestock economy
Value of EU-28 farm production in 2013

- Beef, Veal & Milk: 91.5 bio. € / 23%
- Pigs: 38.5 bio. € / 9.5%
- Poultry & eggs: 30 bio. € / 7.5%
- Other animal products: 12 bio. € / 3%
- Other farm products: 229 bio. € / 57%

Source: Eurostat
EU-28 Livestock sourcing in feedingstuffs - 477 mio. t in 2013

- Forages: 233
- Home-grown cereals: 155
- Purchased straight feedingstuffs: 38
- Industrial compound feed: 51

Source: FEFAC / EU Commission
Value of purchased compound feed in total animal output value in 2013

Source: FEFAC
Compound feed production in European production (Index of volume: 1995=100)

Source: FEFAC / Eurostat
Comparison between prices for animal products and for feedingstuffs (Index 1995=100)

Source: FEFAC / Eurostat
Key figures of the European compound feed industry
Turn-over of the compound feed industry

Source: FEFAC

(Mio. €)

Evolution of number and average size of feed production units

Source: FEFAC

EU-15 as from 1995, EU-25 as from 2004, EU-27 as from 2007, EU-28 from 2012
Industrial compound feed production per country
155 mio. t in 2013 in the EU-28

Source: FEFAC
Industrial compound feed production in the EU-28 in 2013
155 mio. t (per category)

Cattle 27.5%
Pigs 32%
Poultry & eggs 33.5%
Milk replacers 1%
Others 6%

Source: FEFAC
EU-28 compound feed production development per category
+0.2% in 2013 vs 2012)

- EU-15 as from 1995, EU-25 as from 2004, EU-27 as from 2007, EU-28 as from 2013
Evolution of compound feed production in some EU countries

Source: FEFAC
Evolution of compound feed production in EU Member States having joined the EU since 2004

Source: FEFAC
Consumption of feed materials
Feed material consumption by the EU-28 feed industry in 2013

Source: FEFAC

- Feed cereals: 48.5%
- Co-products from Food Industry: 11.5%
- Oils & Fats: 2%
- Cakes & Meals: 27%
- Pulses: 1%
- Dairy products: 1%
- Dried forage: 1%
- Minerals, Additives & Vitamins: 3%
- All others: 5%
Feed material consumption by the EU compound feed industry

**1990**
- Feed cereals: 32%
- Cakes & Meals: 25%
- Pulses: 5%
- Animal meals: 3%
- Oils & Fats: 2%
- Co-products from Food Industry: 14.5%
- Dried forage: 3%
- Dairy products: 1%
- Minerals, Additives & Vitamins: 2%
- All others: 6.5%

**2005**
- Feed cereals: 47%
- Cakes & Meals: 27%
- Tapioca: 5.5%
- Oils & Fats: 1.5%
- Co-products from Food Industry: 12.5%
- Pulses: 1.5%
- Dairy products: 1.5%
- Dried forage: 1.5%
- Minerals, Additives & Vitamins: 3%
- All others: 5%

Source: FEFAC
Development of feed material consumption by the EU-15 compound feed industry

Source: FEFAC

Graph: Line graph showing the development of feed material consumption by the EU-15 compound feed industry from 1991 to 2013. The graph compares consumption in 1,000 tonnes of feed cereals, tapioca, co-products from the food industry, and cakes & meals. The data shows an increasing trend over time.
Usage of cereals in the EU-28 in 2013-14

- Feed industry: 27%
- On farm feed use: 33%
- Food use: 24%
- Biofuels: 4%
- Seeds: 4%
- Other internal use: 8%

Source: DG AGRI
Imports of feed materials in the EU-28 in 2013: 43 mio. t

Source: EUROSTAT

- Feed Cereals: 12.5
- Corn Gluten Feed: 0.4
- DDGS: 0.5
- Molasses: 2.1
- Citrus pellets: 0.5
- Oilmeals: 23.8
- Fishmeal: 0.3
- Pulses: 0.2
- Miscellaneous: 1.9
EU-27 balance sheet for protein rich feed materials in 2011/12

<table>
<thead>
<tr>
<th>Products</th>
<th>EU production (*)</th>
<th>EU consumption (**) 1,000 t</th>
<th>Self-sufficiency</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Products</td>
<td>Proteins</td>
<td>Products</td>
</tr>
<tr>
<td>Soyabean meal</td>
<td>1,275</td>
<td>485</td>
<td>32,672</td>
</tr>
<tr>
<td>Rapeseed and sunflower seed / meals</td>
<td>27,492</td>
<td>5,164</td>
<td>21,779</td>
</tr>
<tr>
<td>Pulses</td>
<td>2,180</td>
<td>480</td>
<td>1,780</td>
</tr>
<tr>
<td>Dried forage</td>
<td>4,483</td>
<td>852</td>
<td>4,250</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>3,205</td>
<td>738</td>
<td>6,056</td>
</tr>
<tr>
<td>Sub-Total</td>
<td>38,635</td>
<td>7,719</td>
<td>66,537</td>
</tr>
<tr>
<td>Fishmeal</td>
<td>324</td>
<td>224</td>
<td>576</td>
</tr>
<tr>
<td>Total</td>
<td>38,959</td>
<td>7,943</td>
<td>67,113</td>
</tr>
</tbody>
</table>

(*): EU production from EU seeds
(**): Including consumption by the petfood industry and on-farm uses
Miscellaneous: includes groundnuts, linseed, copra, palm kernel and cotonseed meals and corn gluten feed
Origin of proteins used for animal feeding in the EU-27 in 2011/12

Soya meal 61%
Sunflower + rapeseed meal 28%
Pulses 2%
Dried forages 3%
Others 5%
Fish meals 2%

Source: PROLEA
Origin of proteins produced for feed use by the EU-27 in 2011/12

- Sunflower + rapeseed meal: 65%
- Soya meal: 6%
- Dried forage: 11%
- Pulses: 6%
- Fish meals: 3%
- Others: 9%

Source: PROLEA
Evolution of EU protein supply dependency (%)
Compound feed production in EU-28 and other European countries in 2013 (in mio. t)

Source: FEFAC / Alltech
Global compound feed production in 2013 (962 mio. t)

Source: FEFAC / Alltech
Evolution of global compound feed production (Index 100 = 1999)

Source: FEFAC / Alltech / Feed International
Livestock production and consumption in the EU
Livestock population in the EU

Source: Eurostat

Meat production development in the EU per category

Source: DG AGRI

EU-15 from 1995 to 2003, EU-25 as from 2004 to 2006, EU-27 as from 2007 to 2012, EU-28 from 2013
Meat consumption development in the EU per category

Source: DG AGRI

Total meat, in kg/capita


- Total meat
- Beef & Veal
- Pig meat
- Poultry meat
- Others
Total meat consumption per capita in the EU-28 per category in 2013

- Pig meat: 45.9%
- Poultry meat: 26.0%
- Beef & Veal: 18.1%
- Sheep & Goat meat: 2.4%
- Others: 7.5%

Source: DG AGRI
EU self sufficiency in some EU agricultural products in 2013

Source: EUROSTAT/ DG AGRI

- Skimmed milk powder
- Cereals
- Pork
- Cheese
- Poultry
- Butter
- Eggs
- Beef and veal
- Sugar
- Soybean meal

Legend:
- Red: EU self-sufficiency
- Blue: EU imports
- Yellow: EU exports

Values:
- 0
- 20
- 40
- 60
- 80
- 100
- 120
- 140
- 160
- 180