



**FEFAC 50<sup>th</sup> Anniversary**  
1959-2009

## **Impressum**

FEFAC aisbl  
Rue de la Loi, 223 Bte 3  
1040 Bruxelles (Belgique)

Enterprise n° 0408 295 071

European Commission Register  
of Interest Representatives  
ID Number 77105321408-83

Layout  
Indigo, St.Vith

Print  
Pro D&P St.Vith

## **Disclaimer**

© 2009 – FEFAC

The information contained in this brochure is for general information purposes only. The information is provided by FEFAC and while we endeavour to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability or availability with respect to the brochure or the information, products, services, or related graphics contained in the brochure for any purpose. Any reliance you place on such information is therefore strictly at your own risk.

No part of this brochure may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photo-copying, recording or by any information storage and retrieval system, without securing the written permission of FEFAC, except for the inclusion of brief, clearly cited quotations in a review or article.

# Table of contents

Foreword	5
EU & FEFAC history	7
Who we are	9
• FEFAC Secretariat	13
• National Associations joining FEFAC	15
• FEFAC and the European Institutions	17
• FEFAC and the other chain partners	19
• FEFAC and the International Organisations	21
Future challenges and key achievements	27
Compound feed production in the EU	31
Hall of fame	35
Thanks	37

## Member Association Posters

VFÖ	Austria	10
APFACA/BEMEFA	Belgium	10
CFIA	Croatia	12
CAFM	Cyprus	12
CMSOZZN	Czech Republic	16
DAKOFO	Denmark	16
FFDIF	Finland	18
SNIA	France	18
DVT	Germany	30
SEVIZ	Greece	20
ASSALZOO	Italy	26
IGFA	Ireland	20
NEVEDI	The Netherlands	6
TÜRKIYEM-BIR	Turkey	30
IZBA	Poland	6
IACA	Portugal	36
SFMA	Serbia	25
AFPWTC	Slovakia	33
GZS	Slovenia	34
CESFAC	Spain	34
FS	Sweden	38
LANTMÄNNEN	Sweden	39
VSF	Switzerland	36
AIC	United Kingdom	39

# Innovative strength

## Cehave Landbouwbelang

If you truly want to create added value, innovation makes the difference. That is what Cehave Landbouwbelang believes in. As a growing international player in animal feed and agricultural products, we know our customers. Our main goal: creating sustainable value and strengthening their world.

We want to be leading in the development of new products, services and techniques. Therefore, Cehave Landbouwbelang continuously invests in Research and Development. Besides that, we believe in synergy through international cooperation.

Cehave Landbouwbelang has operations in the Netherlands, Belgium, Germany, Poland, Hungary and China. Knowledge exchange between these companies further leads to distinguishing solutions. Those concepts lead to results at farm level. And that is what we are working for: farmers benefiting directly from our innovative strength.

Cehave Landbouwbelang  
P.O. Box 1  
5460 AA Veghel, The Netherlands  
Tel. +31 413 38 22 55  
[www.cehave.com](http://www.cehave.com)



*Cehave Landbouwbelang produces and markets compound feed, specialties, concentrates, by-products and agricultural machinery. The enterprise is growing autonomously and through acquisitions. With a workforce of over 2,100 in Western Europe, Central and Eastern Europe and Asia Cehave Landbouwbelang realizes an annual turnover of EUR 1.2 billion world-wide.*

# Foreword

## Winds of change – in the feed industry too



Some say that the 50<sup>th</sup> Anniversary is the time when the “age of reason” sets in. I sincerely hope that this sentiment is fully shared by all our Members, market partners

and political decision-makers when commemorating the 50<sup>th</sup> Anniversary of FEFAC, our European Feed Industry Federation. In times of turmoil on the financial markets, nothing is more required than a “cool head and good, fact-based judgment” to overcome the current crisis of confidence in the short-term and long-term viability of our free-market-based economic systems.

The “good news” for our sector is that due to the financial debacle of bank institutions, our politicians are recognizing the value of investment in agriculture. We should say “welcome back” to the real economy, reminding them that the feed & food industry is producing essential goods for livestock farmers who are producing meat, eggs and dairy products at very competitive prices. It is encouraging to see that our global leaders have agreed at the

last G8 Summit in L’Aquila on the importance of assuring an affordable supply of nutritious foodstuffs to the growing world population injecting 20 bio. USD in rural economies in the developing world.

### Productivity and profitability

I believe that this is the right time for EU decision-makers to review the policies affecting the competitiveness and sustainability of our agro-food industry. The G8 Farm Ministers already highlighted in their declaration at the meeting in April 2009 on global food security how important it is to rethink our agricultural models at global level and underlined the need to develop partnerships with the private sector to meet the goals laid down in the UN Millennium Declaration on global food security. The EU High Level Group on the Competitiveness of the Agro-Food Industry has come forward with a set of well-defined practical recommendations on how to stimulate the productivity and profitability of our farming and food

sector in order to exploit its full potential to contribute to growth in jobs while strengthening global food security.

### Ecological intensification

The global debate on securing food supplies for the world population and the impacts of climate change on food production will have a major influence on political frameworks for the livestock sector in the EU in coming years too. The European Commission White Paper on climate change published in April 2009 already contains a “catalogue of solutions” aiming at launching the adaptation of European agriculture to the climate change. I am convinced that the feed industry has already been making a considerable contribution to improving efficiency in the livestock sector for many years now. All the livestock farming experts agree, however, that the challenge of further ecological intensification of animal production must be accepted by all partners and can only be tackled successfully by applying the latest

technologies with full consideration given to animal welfare requirements. The indispensable “winds of change” within the sector with all its challenges are already becoming evident and demand action from all involved.

### Science-based approach

FEFAC is a founder member of the Round Table of the entire EU food chain, including agro-supply industries, farmers, food processors, the packaging industry and retailers on the subject of sustainable production and consumption. This initiative enjoys active support by the European Commission, who offered to co-chair the Round Table to facilitate the development of a science-based approach. With a view to the Copenhagen Conference on Climate Change in December 2009, I am proud to say that the FEFAC Council agreed to fully collaborate in the new initiative, which confirms my conviction that indeed our industry has entered the “age of reason” as a very mature, highly competitive industry, and truly innovative in finding solutions to problems of our livestock customers and our society at large.

I believe ... that man will not completely perish as long as others remember him and that the history of the future would be without shape nor meaning if it did not find its source in a past that determines and explains it.

Jean d’Ormesson (1978)

By Pedro Corrêa de Barros,  
FEFAC President

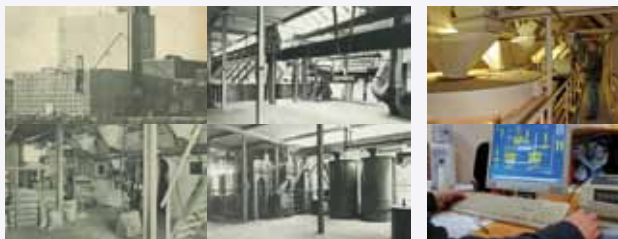
# NEVEDI

NEDERLANDSE VERENIGING DIERVOEDERINDUSTRIE



Year of Foundation: 2000

In 2009:  
Members: 115  
Feed Production: 13 900 000 tons  
(2008 estimates)

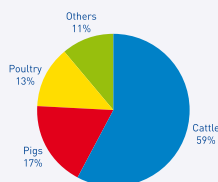


## KEY NUMBERS

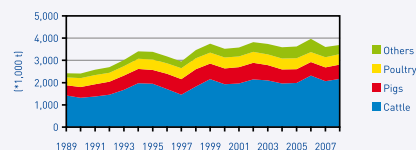
about the livestock population  
(2007):

Cattle:	3 745 000
Dairy Cows:	1 413 000
Pigs:	11 663 000
Sheep:	1 369 000
Broilers:	50 421 000
Horses:	133 524
Layers:	42 342 000

Industrial compound feed production  
per categories



Evolution of compound feed production  
per categories



THE NETHERLANDS

# IZBA

IZBA GOSPODARCZA



Year of Foundation: 1997  
Members: 20

In 2008:  
Members: 81  
Units: 49  
Feed Production: 3 511 000 tons  
(2007)

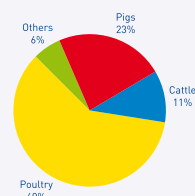


## KEY NUMBERS

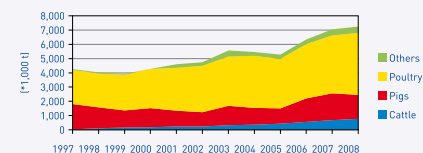
about the livestock population:

Cattle:	5 563 600
Pigs:	13 287 420
Poultry:	134 256 000
Sheep:	269 600

Industrial compound feed production  
per categories



Evolution of compound feed production  
per categories



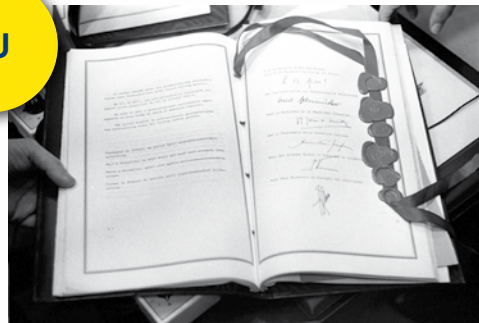
POLAND

# EU & FEFAC history



EU

© Communautés Européennes, 2009



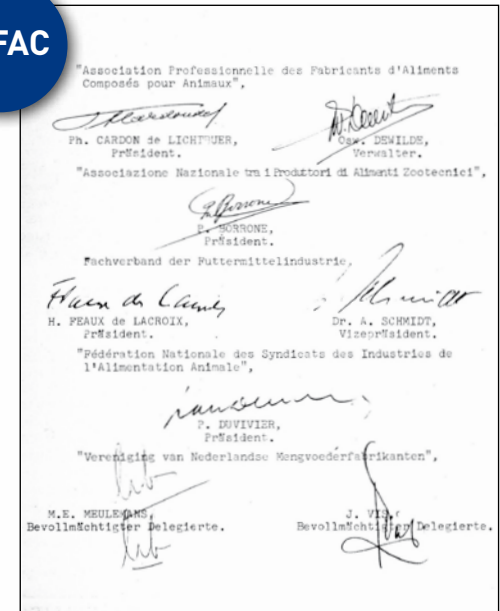
© Communautés Européennes, 2009

On 25 March 1957, two treaties were signed in Rome that gave birth to the European Economic Community (EEC) and the European Atomic Energy Community (Euratom): The Treaties of Rome. The signatories of the historic agreement were Christian Pineau on behalf of France, Joseph Luns from The Netherlands,

Paul Henri Spaak from Belgium, Joseph Bech from Luxemburg, Antonio Segni from Italy and Konrad Adenauer from the Federal Republic of Germany. The Treaty establishing the EEC affirmed in its preamble that signatory States were "determined to lay the foundations of an ever closer union among the peoples of Europe".



FEFAC



## 5 Member Associations

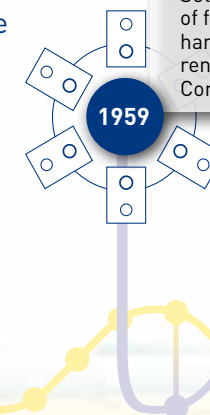
- Association Professionnelle des Fabricants d'Aliments Composés pour Animaux (BE)
- Associazione Nazionale tra i Produttori di Alimentizootecnici (IT)
- Fachverband der Futtermittelindustrie e.V. (DE)
- Syndicat National des Industriels de l'Alimentation Animale (FR)
- Vereniging van Nederlandse Mengvoederfabrikanten (NL)

signing the document of the foundation of the European Feed Manufacturers' Federation (FEFAC) in 1959.

- Signature of the document of the foundation of FEFAC.
- Setting up of the first Committee in charge of feed legislation and its European harmonisation. This Committee was renamed more recently Animal Nutrition Committee.



• Signature of the Treaties of Rome.





The Nutreco ambition is to contribute to meeting the rising food needs of a growing world population in a sustainable manner. We operate at the critical junction between the raw materials used in animal nutrition and fish feed and the producers of meat, dairy products and fish. By applying our knowledge of feed ingredients and the nutrition of animals and fish, we gain optimum value from limited resources. It's our ability to convert raw materials into advanced feed solutions for our customers that meet the needs of farmed animals and fish and contribute in delivering high-quality products for human nutrition.

Nutreco is a global leader in animal nutrition and fish feed. Our advanced feed solutions are at the origin of food for millions of consumers worldwide. Quality, innovation and sustainability are guiding principles, embedded in the Nutreco culture from research and raw material procurement to products and services for agriculture and aquaculture. Experience across 100 years brings Nutreco a rich heritage of knowledge and experience for building its future. Nutreco employs almost 9,300 people in 30 countries, with sales in 80 countries. Headquartered in the

Netherlands, Nutreco is listed on the Euronext stock exchange in Amsterdam and has annual revenues approaching EUR 5 billion.

Nutreco compound feeds in Europe are made by the Hendrix companies in the Netherlands, Belgium and Germany, and by Nanta and Agrovic in Spain and Portugal. A network of production sites, sales offices and dealers provides a strong presence in these markets where the Nutreco subsidiaries deliver a broad range of high quality products and feed solutions.

*feeding  
the future*

# Who we are

## The European Feed Manufacturers' Federation – A reliable partner of the food chain

Mr André Namur, a native Luxembourger, joined FEFAC in 1960 and was appointed Secretary General in 1961, a position which he held for 33 years until his retirement in 1994. He belonged to the generation of “pioneers” who managed the setting-up of modern, effective European Trade Associations as a unique tool for the creation of an informed, transparent dialogue between the new European Institutions and partners from industry and trade.



André Namur, Secretary General, from 1961 to 1994

The basic working structure and working priorities linked to the CAP and the harmonization of EU feed legislation of FEFAC put in place under his oversight are still valid today, a proof of his foresight and keen understanding of the needs of the European livestock and feed industry with regard to the development of the EU political and regulatory framework governing the sector's activities.

He was succeeded by Mr Alexander Döring in 1994, who oversaw the successful expansion and integration of 9 Active Member Associations from the new Member States and new Observer Members from EU candidate countries as well as Associate



FEFAC Council, June 2009

Members. FEFAC expansion was greatly facilitated by the European Commission TAIEX programme that co-organised and funded 12 FEFAC/TAIEX Workshops in the new Member States and candidate countries since 1999. FEFAC membership today consists of 21 national associations

from 20 Member States as Active Members, 3 Observer Members from Turkey, Croatia and Serbia as well as 3 Associate Members from Norway, Switzerland and EMFEMA, the European Feed Minerals' Association. FEFAC is the only independent spokesman of the European compound feed and premix industry at the level of the European Institutions.

As a result of the experience with the BSE crisis, the working mandate of the FEFAC Praesidium (Pedro Corrêa de Barros (President), Giordano Veronesi, Patrick Vanden Avenne,

Samenwerking geeft kracht. Niet alleen in bedrijven, maar ook nationaal en internationaal. FEFAC is een goed medium om in Europa als branche krachtig te kunnen opereren. *(Cooperation brings power. Not only in companies, but on national and international level as well. FEFAC is an excellent medium for our branch of trade to operate powerfully in Europe.)*

Kees Sijssens

CEO of Coöperatie Cehave Landbouwbelang

- 1st FEFAC Congress in Paris (FR).
- Memorandum on the harmonisation of European feed legislation, Memorandum on the establishment of the CAP.

1961

1962

- Entry into force of the Common Agricultural Policy (CAP).

1963

- Setting up of the CODEX Alimentarius as a joint instrument of FAO and WHO.

1963

- Setting up of a Committee in charge of economic matters. This Committee was renamed more recently Industrial Compound Feed Production Committee.

# VFÖ

VERBAND DER FUTTERMITTELINDUSTRIE  
ÖSTERREICHS



Year of Foundation: 1995

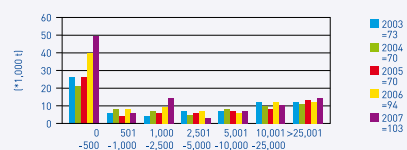


## KEY NUMBERS

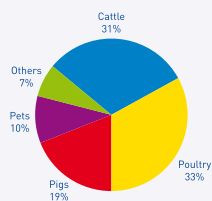
about the livestock population:

Cattle:	1 991 000
Dairy Cows:	528 000
Pigs:	3 181 000
Laying Hens:	4 057 000
Sheep:	351 000

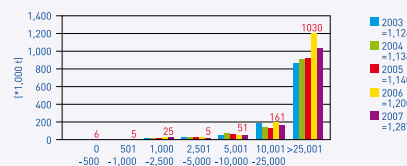
Industrial compound feed production per categories - members



Industrial compound feed production per categories



Industrial compound feed production per categories - production



# APFACA

ASSOCIATION PROFESSIONELLE DES FABRICANTS  
D'ALIMENTS COMPOSÉS POUR ANIMAUX A.S.B.L.



Year of Foundation: 1944

In 2008:  
Members: 180  
Feed Production: 6 288 000 tons

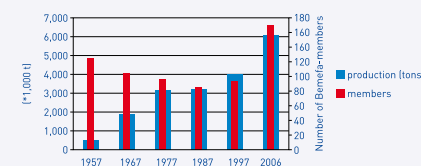


## KEY NUMBERS

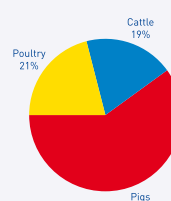
about the livestock population (2006):

Cattle:	2 663 076
Pigs:	6 294 904
Poultry:	32 866 650
Calf:	167 680
Sheep:	153 976
Goats:	27 985

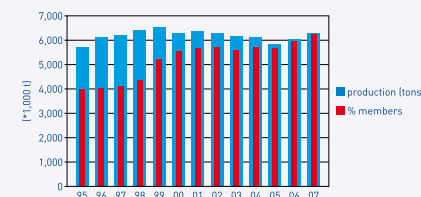
Overview production and members of Bemeffa (1957 till 2006)



Industrial compound feed production per categories in 2008



Production of Belgian Bemeffa-members, in comparison with Belgian compound feed production (1995 till 2007)



AUSTRIA

BELGIUM

Marek Kumprecht, Helen Raine, Dietrich Schwier, Aurelio Sebastia Aguilar, Adolphe Thomas, Ad Hectors) has been extended to ensure a rapid response mechanism to emerging feed safety and security issues. FEFAC Council, as the key decision-making body, is focusing on strategic industry issues including the sustainable competitiveness of the EU feed and livestock industry and feed & food safety. Their work is supported by the new Directors' General College, the six Standing Committees on "Animal Nutrition", "Industrial Compound

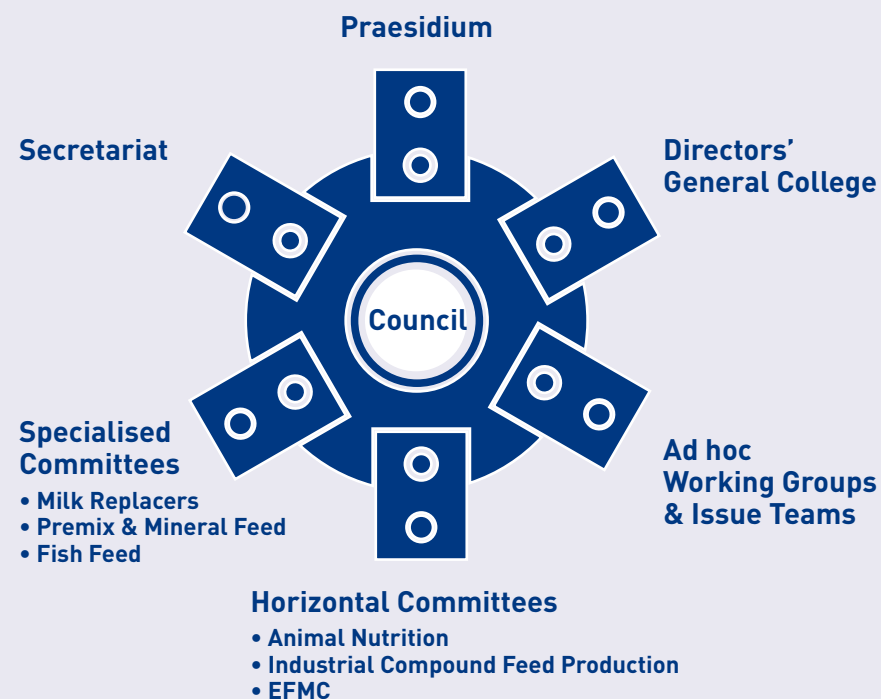
Feed Production", "EFMC" (European Feed Manufacturers' Guide), "Milk Replacers", "Premix & Mineral Feed" and "Fish Feed", the Task Force of Sustainable Feed Production and a number of ad-hoc Issue Teams.

The annual "Leaders of Industry" meeting with CEOs from market leaders provides a valuable sounding board on major EU policy and market developments affecting the EU livestock and feed industry in order to better define the scope of FEFAC actions at EU and international level.



FEFAC Council, June 2009

## Organisation Chart



1966

• Vth FEFAC Congress in Knokke (BE).

1967

• Setting up of the first specialised Committee in charge of milk replacers production still active today as the Milk Replacers Committee.

1969

• Mansholt plan for the reform of the CAP.

1970

• Publication of the first harmonised EEC feed-related Directives (additives, sampling procedures and methods of analysis).

# CFIA

GRUPACIJA INDUSTRIJE STOČNE HRANE

CROATIA



HRVATSKA

**Year of Foundation:** 1994  
**Members:** 40  
**Feed Production:** 539 673 tons

**In 2008:**  
**Members:** 45  
**Units:** Feed: 41  
 Premix: 4  
**Feed Production:** 626 173 tons

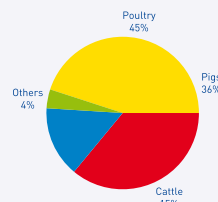


## KEY NUMBERS

about the livestock population:

Cattle:	94 217
Pigs:	225 654
Poultry:	282 932
Others:	23 370

Industrial compound feed production per categories



# CAFM

CYPRUS ASSOCIATION OF FEED MANUFACTURERS

CYPRUS

PANCYPRIAN ASSOCIATION OF THE FEED,  
 FEED ADDITIVES & FEED MATERIALS  
 INDUSTRIALISTS & IMPORTERS



CYPRUS

**Year of Foundation:** 1998

**In 2008:**  
**Members:** Feed compounders: 23  
 Premix companies: 3  
**Units:** Feed: 42  
 Premix: 3  
**Feed Production:** 295 000 tons

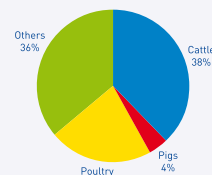


## KEY NUMBERS

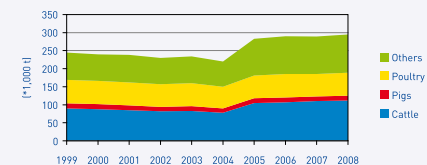
about the livestock population:

Cattle:	55 590
Dairy Cows:	23 600
Pigs:	462 000
Poultry:	13 680 000
Sheep:	183 700
Goats:	214 150
Layers:	390 000

Industrial compound feed production per categories



Evolution of compound feed production





**Secretary General**  
Alexander Döring

**Deputy Secretary General**  
Arnaud Bouxin

**European Affairs Manager**  
Julien Taieb

**Executive Secretary**  
Françoise Liber

**Administrative Secretary**  
Susana Chao

**Documentation / Reception**  
Roseline Deiana

**Translation + Webmaster**  
Anne Peters

**Translation**  
Annette Waxweiler

**FEFAC's mission is to**



represent, defend and promote the interests of the European compound feed industry to the European Institutions;



develop professional rules and good manufacturing practices that ensure the quality and the safety of compound feed;



lobby for a legislative framework and its implementation, without discrimination in EU Member States so as to maximise market opportunities for EU compound feed companies;



encourage the sustainable development of animal productions responding to the market requirements, so as to maximise market opportunities for EU compound feed companies.



safeguard conditions of free access to raw materials, the proper functioning of their markets and the definition of their quality;

• Study on the protein needs following US embargo on soy exports.

1973

1973

- 1<sup>st</sup> enlargement to Ireland, Denmark and the United Kingdom.
- Adoption of EEC legislation on maximum levels of undesirable products and substances in feed.

1976

• Creation of the contracts working party in charge of purchase contracts and improvement of contract clauses for buyers of raw materials (discontinued in 1996).

Working with you to build  
a better industry & future

# VICTAM International

Victam International is a non-profit organisation that was founded in the Netherlands in 1964. The role of the Victam is to organise trade fairs, conferences and seminars for the animal feed and related industries.

It also aids and sponsors conferences, seminars, study tours and publications for these important industry sectors.

The Victam Foundation supports and encourages student exchanges, institutes and research projects.

Victam now organises a series of trade shows around the world, the primary events are Victam Asia, to be held next in Bangkok, Thailand in March 2010 and Victam International, which has moved from Utrecht in the Netherlands, and will now be held in Cologne, Germany in May 2011.

Each trade fair will comprise three events – VICTAM, FIAAP and GRAPAS (see right) and each of these events is supported by their own technical conferences.

For further information please contact:

**Expo@victam.com** or visit **www.victam.com**



Exhibition for animal feed equipment and technology suppliers and biomass pelleting



Exhibition for animal feed, ingredients, additives and formulation



Exhibition for flour & rice milling, grain processing, industrial noodle & pasta production, breakfast cereal and extruded snack processing

# National Associations joining FEFAC

## Active Members

VFÖ	Austria	1995 (1964)
APFACA/BEMEFA	Belgium	1959
CFA	Cyprus	2004 (2003)
CMSOZZN	Czech Republic	2004 (2000)
DAKOF0	Denmark	1973
FFDIF	Finland	1995 (1993)
SNIA	France	1959
DVT	Germany	1959
SEVIZ	Greece	1989
ASSALZOO	Italy	1959
IGFA	Ireland	1973
LGPA	Lithuania	2005
NEVEDI	The Netherlands	1959
IZP	Poland	2004 (2001)
IACA	Portugal	1986 (1976)
AFPWTC	Slovakia	2004 (2003)
GZS	Slovenia	2004
CESFAC	Spain	1986
FS	Sweden	1995
LANTMÄNNEN	Sweden	1995
AIC	United Kingdom	1973

(observer as from ...)

## Observer Members

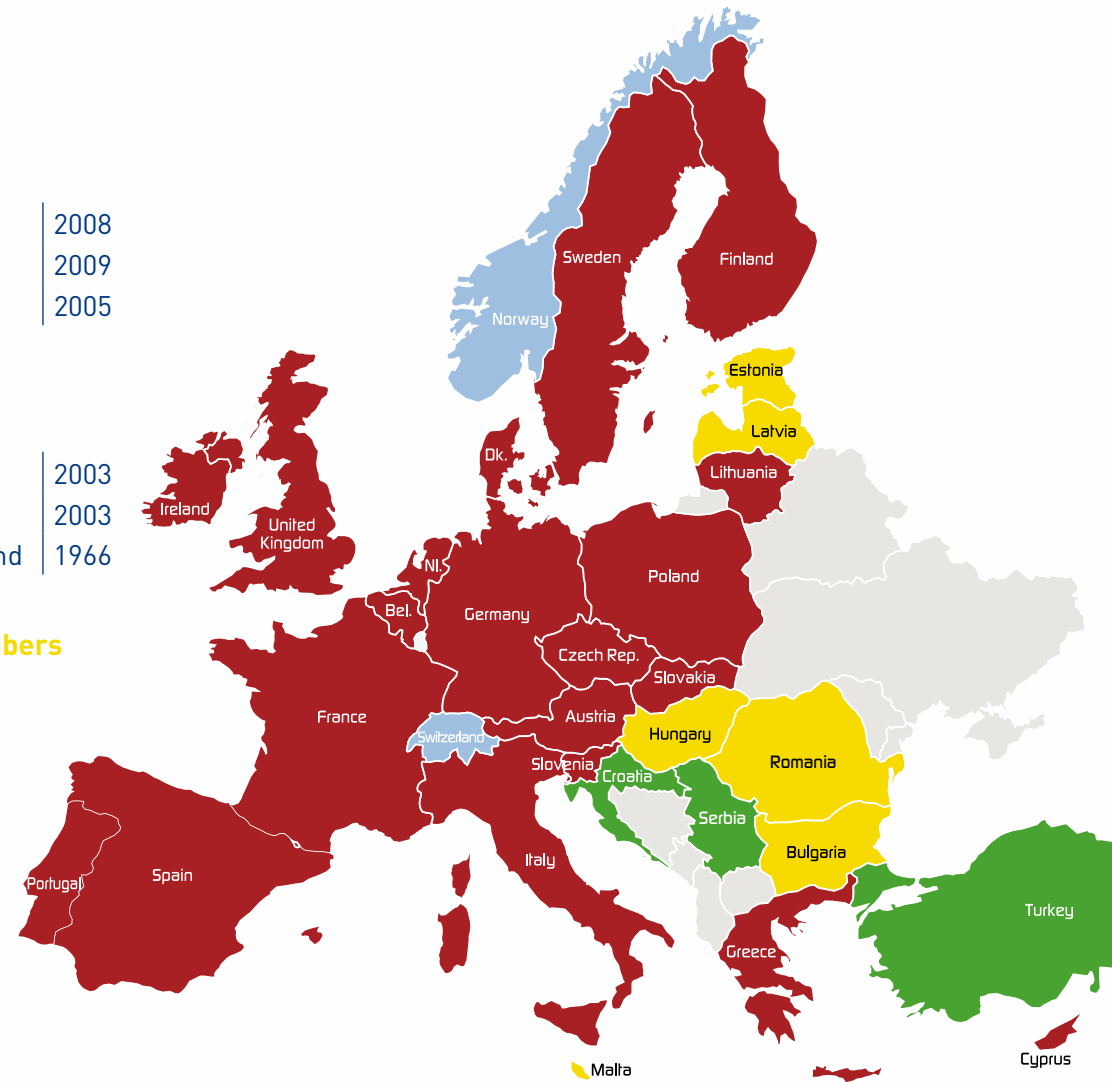
CFIA	Croatia	2008
SFMA	Serbia	2009
TURKIYEM	Turkey	2005

## Associate Members

EMFEMA	Norway	2003
FHL	Norway	2003
VSF	Switzerland	1966

## Potential Active Members

Bulgaria
Estonia
Hungary
Latvia
Malta
Romania



• Xth FEFAC Congress in Copenhagen (DK).

1977

1977

• Adoption of the EEC Directive on the marketing of straight feedingstuffs.

1979

- First elections of the European Parliament.
- Adoption of the EEC Directive on the marketing of compound feedingstuffs.
- Setting up of an Advisory Committee on animal feedingstuffs with special permanent working parties.
- Establishment of the EC Rapid Alert System for Food (RASf). This system was extended to feed by the General Food Law in 2002.

1980

- Introduction of an obligatory minimum inclusion rate for skimmed milk powder in milk replacers.

# ZZN

**BOHEMIAN - MORAVIAN UNION OF ORGANIZATIONS  
FOR AGRICULTURAL SUPPLY & PURCHASE**



ČESKÁ REPUBLIKA

**Year of Foundation:** 1991

**In 2008:**  
**Members:** 67  
**Units:** 62  
**Feed Production:** 2 180 000 tons

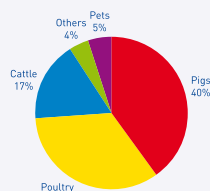


## KEY NUMBERS

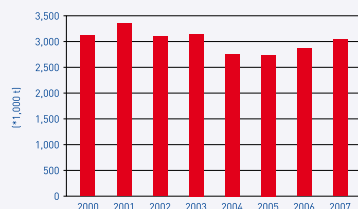
about the livestock population:

Cattle:	1 402 000
Dairy Cows:	569 000
Pigs:	2 433 000
Poultry:	27 317 000
Sheep and goats:	200 000
Layers:	6 309 000

**Industrial compound feed production  
per categories**



**Evolution of compound feed production  
per categories**



CZECH REPUBLIC

# DAKOFO

**THE DANISH GRAIN AND FEED  
TRADE ASSOCIATION**



KONGERIGET  
DANMARK

**Year of Foundation:** 1974  
**Members:** 50

**In 2009:**  
**Members:** Feed compounders/  
grain dealers: 33  
Agri brokers: 25

**Units:** 64  
**Feed Production:** 4 432 631 tons  
(2007)



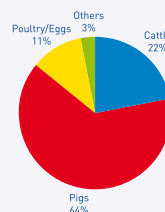
## KEY NUMBERS

about the livestock population:

Cattle:	1 566 218
Dairy Cows:	545 424
Pigs:	13 723 467
Poultry:	15 966 869
Sheep:	156 503
Layers:	3 174 002



**Industrial compound feed production  
per categories**



DENMARK

## FEFAC and the European Institutions

FEFAC officially entered the **European Commission Register of Interest Representatives** in January 2009.

FEFAC experts take part in the following **EU Advisory Groups**

- Directorate General for Health and Consumers – DG SANCO
  - Food Chain, Animal and Plant Health
- Directorate General for Agriculture and Rural Development – DG AGRI
  - Common Agricultural Policy
  - Cereals, Oilseeds and Proteins
  - Milk
  - Organic Farming
  - Dried Fodder

FEFAC provides **feed expertise and data** to the official, public inquiries conducted by DG AGRI and DG SANCO preceding the launch and adoption of new legislative acts affecting the feed industry.

In cooperation with DG SANCO, FEFAC has organised two major **EU feed safety workshops** in 2002

on the MPA hormone contamination in sugar glucose and in 2009 on the Dioxin contamination of bread meal and melamine in organic soybean meal. With the support of DG SANCO, FEFAC organised a feed and food chain meeting for the launch of the European Feed Manufacturers' Guide (EFMC) in 2007.

FEFAC takes an active part in the **EFSA Stakeholders' Platform**. The European Food Safety Authority (EFSA) is responsible for the EU-wide risk assessment regarding food and feed safety. FEFAC experts have provided data and industry studies in a series of EFSA feed safety risk assessments mainly conducted by the Scientific Panels on Biological Hazards, Contaminants, Feed Additives and Animal Health/Animal Welfare. In cooperation with EFSA, FEFAC organised a workshop on the re-authorisation of feed additives in 2008.

FEFAC has been co-organising 12 workshops (between 1999 and 2009 in Italy, Czech Republic, Cyprus,

Slovakia, Slovenia, Poland, Estonia, Latvia, Turkey, Romania, Croatia, Hungary and Serbia) on HACCP-based Feed Safety Assurance Systems in animal feed production in cooperation with **TAIEX**, the Technical Assistance Information Exchange Office of DG Enlargement

In cooperation with the EU Food and Veterinary Office (FVO) and DG SANCO, FEFAC experts contributed to the **training seminars** for new FVO feed inspectors in 2003 and 2006.

FEFAC experts participated in Public Hearings of the **European Parliament** Environment Committee, Public Health and Food Safety Committee on animal feed safety in 1999 and GM Food and Feed labelling legislation in 2002 as well as the Committee on Agriculture Public Hearing on economic impacts of the EU 0-tolerance policy for not yet approved GM events on EU livestock production in 2007.



© Communautés Européennes, 2009

• FEFAC opinion on the principle of equality between home-mixers and industrial feed manufacturers in the field of responsibilities and official feed control.

1981

1981

• 2<sup>nd</sup> enlargement to Greece.

• FEFAC position on milk quotas and on the use of additives in premixes.

1984

1984

• Introduction of the milk quota system.

# FFDIF

FINNISH FOOD & DRINK INDUSTRIES' FEDERATION



SUOMEN TASAVALTA

**Year of Foundation:** 1968  
**Members:** 6  
**Feed Production:** 727 100 tons (1973)

**In 2008:**  
**Members:** 4  
**Feed Production:** 1 377 900 tons

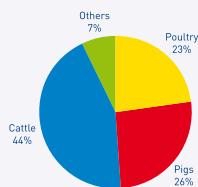


## KEY NUMBERS

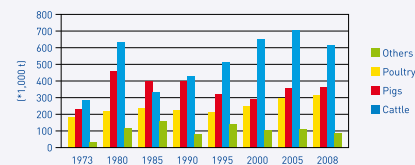
about the livestock population:

Cattle: 927 000  
 Dairy Cows: 296 000  
 Pigs: 1 448 000  
 Laying Hens: 3 134 000  
 Sheep: 119 000

Industrial compound feed production per categories



Evolution of compound feed production



FINLAND

# SNIA

SYNDICAT NATIONAL DES INDUSTRIES DE LA NUTRITION ANIMALE



FRANCE

**Year of Foundation:** 1971

**In 2008:**  
**Members:** 161 Feed and Premix manufacturers  
**Feed Production:** 10 700 000 tons

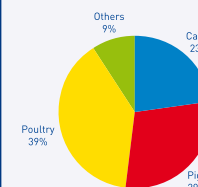


## KEY NUMBERS

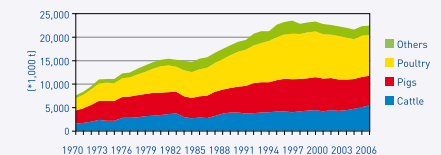
about the livestock population:

Cattle: 19 124 000  
 Dairy Cows: 3 759 000  
 Pigs: 14 797 000  
 Poultry: 107 497 000  
 Sheep: 8 285 000  
 Goats: 1 250 000  
 Layers: 58 400 000

Industrial compound feed production per categories



Evolution of compound feed production



FRANCE

## FEFAC and the other chain partners

Together, we get stronger! FEFAC has for long granted priority to collaboration with other stakeholders of the feed and food chain. FEFAC participated in the establishment and/or is member of:

**EAFN (European Agri-Food Network)**, which facilitates informal liaison between the professional organisations in the agri-food chain at EU level with a focus on horizontal issues affecting the agro-supply sector.

**EATIP (European Aquaculture Technology & Innovation Platform)**, one of the European Technology Platforms endorsed by DG RESEARCH. It was set up by the European fish farmers (FEAP) with the support of the whole aquaculture supply industries, including leading fish feed producers and FEFAC Fish Feed Committee. It's main goal is to develop a vision document on the research needs of the Aquaculture sector until 2020 including a strategic research agenda containing key projects which could facilitate the development of a more sustainable

and competitive EU Aquaculture sector.

**EISA (European Initiative for Sustainable Development in Agriculture)**, set up by national farmer initiatives supported by agro-supply industries promoting the development of integrated farming practices through the development and continuous update of the EISA Integrated Farming Framework containing a European definition and characterisation of Integrated Farming as guideline for sustainable development of Agriculture.

**EUFETEC**, a European feed technology research platform composed of several feed-related bodies representing the feed industry and research institutes which decided to join their efforts with a view to better co-ordinate the present feed-related research activity and services to feed companies at European level including the development of collaborative research projects.

**EU Grain Club**, grouping European federations of the cereals processing

industry and trade. This informal network is a platform for exchange of views and action on issues of common interest regarding EU policies affecting cereal markets.

**European Meat Platform**, composed of representatives of livestock farming, industry and trade including the feed industry. The main objective of the ad hoc group is to defend the production and the processing of farm animals and their meats on the territory of the European Union during the DOHA Development Round of the WTO.

**FFC (EU Feed and Food Chain platform on the use of green biotechnology)**, composed of partner organizations of the whole feed and food chain dealing with the impact of EU and international regulations for the use of modern biotechnology in agriculture and food production on EU feed and food markets.

**Food Safety Platform**, grouping key European stakeholder federations concerned with feed & food safety, aiming at improving communication

between the feed & food chain partners on issues of mutual interest.

**Food SCP Round Table (EU Food Chain Round Table on Sustainable Consumption & Production)**, composed of representative organisations from the entire food chain from the agro-supply sector to retailers with the main objective to develop a harmonised environmental impact assessment methodology, to develop tools for consumer communication and to identify actions for further improvement of the environmental performance of the food chain. The Round Table will be co-chaired by the European Commission with observer participation from UNEP and the European Environment Agency, EEA.

**Round Table on Responsible Soy (RTRS)**, an international multi-stakeholder initiative that brings together those concerned with the impacts of the soy economy. It seeks to promote the best available practices to mitigate negative impacts throughout the value chain.

1986

- 3<sup>rd</sup> enlargement to Portugal and Spain.
- Signature of the Single European Act (SEA) establishing the Single Market.

- XV<sup>th</sup> FEFAC Congress in Brighton (UK).
- Legal action by FEFAC and other cereals processing industry & trade against the cereals co-responsibility levy introduced in 1987.

1987

1988

- Ruling of the European Court of Justice on the cereals co-responsibility levy.

# SEVIZ

HELLENIC FEED INDUSTRY ASSOCIATION

GREECE

ΣΕΒΙΖ



ΕΛΛΗΝΙΚΗ ΔΗΜΟΚΡΑΤΙΑ

Year of Foundation: 1975

In 2008:  
Members: 50  
Feed Production: 1 200 000 tons



# IGFA

THE IRISH GRAIN AND FEED ASSOCIATION

IRELAND



IRELAND

In 1988:  
Members: Feed: 99  
Importers: 11  
Grain merchants: 26

In 2009:  
Members: Feed: 43  
Importers: 6  
Grain merchants: 13  
Ancillary: 43  
Feed Production: 3 600 000 tons

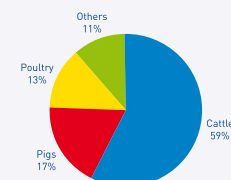


## KEY NUMBERS

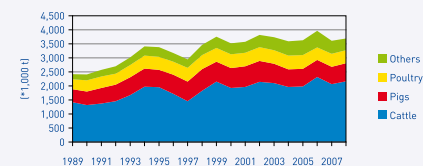
about the livestock population:

Cattle:	5 900 000
Dairy Cows:	1 200 000
Pigs:	1 500 000
Sheep:	3 500 000
Hens:	1 800 000

## Industrial compound feed production per categories



## Evolution of compound feed production



## FEFAC and the International Organisations

FEFAC holds observer status in the **CODEX Alimentarius Commission** since 1999. The CODEX Alimentarius Commission was created in 1963 by FAO and WHO to develop food and feed standards, guidelines and related texts such as codes of practice under the Joint FAO/WHO Food Standards Programme. The main purposes of this Programme are protecting the health of consumers and ensuring fair trade practices for food products, as well as promoting coordination of all food standards work undertaken by International Governmental and Non-Governmental Organisations. In 1999, the CODEX Alimentarius Commission agreed to set up a Task Force on animal feed safety whose main mandate consisted in developing a code of practice for good animal feeding covering all aspects related to feed manufacturing, including grazing, mixing on the farm and industrial feed production as well as feed distribution to food producing farm animals and farmed fish. The CODEX Code was officially adopted by the CODEX Alimentarius Commission in 2005.

FEFAC assisted **OIE**, the World Organisation for Animal Health, during the review of the OIE Terrestrial Animal Health Code with regard to feed-related references in the OIE standards.

FEFAC participated in the series of joint **WHO/OIE and FAO conferences** on antimicrobial resistance by providing key information data regarding the in-feed use of antibiotics (medicated feed, coccidiostats).

FEFAC holds regular contacts with **WTO** on issues related to the SPS agreement which may affect global trade in feedingstuffs and products of animal origin.

FEFAC is a member of **IFIF**, the International Feed Industry Association, which was founded in 1987 by FEFAC and AFIA, the American Feed Industry Association. IFIF holds membership from national and regional trade associations, a.o. the American Feed Industry Association (AFIA), the Brazilian (Sindirações), Chinese (CFIA), Mexican and Japanese

Feed Industry Associations as well as global corporate feed companies, accounting for more than two thirds of the estimated global commercial feed production of app. 700 mio. t. IFIF has organised two major Global Feed & Food Congresses in Sao Paolo in 2005 and 2007. The third IFIF Global Food & Feed Congress will be held in Cancun in April 2010. IFIF and FAO have jointly organised two International Feed Regulators Meetings in 2008 and 2009 to deal with emerging feed safety issues like melamine and antibiotic residues stemming from co-products of the bioethanol sector. In cooperation with FAO, IFIF has produced a manual on good practices for the feed industry containing a series of additional information material designed to assist industry and government bodies with the implementation of the CODEX Code.



• FEFAC opinion on the harmonisation of the marketing of compound feed Directive.

1990

- Harmonisation of legislation on the marketing of compound feed and on medicated feed.
- Veterinary rules for the disposal and processing of animal waste, for its placing on the market and for the prevention of pathogens in feedstuffs of animal or fish origin.

- Signature of the Maastricht Treaty creating the European Union and leading to the creation of the Euro.
- Elimination of the co-responsibility levy.
- Adoption of "Mc Sharry reform" of the CAP.
- EU/US Blair House agreements on international agriculture negotiations.

1992



## Collaboration with FAO: the experience of IFIF

### FAO & IFIF: an ongoing and mutually beneficial partnership

The International Feed Industry Federation (IFIF) and the Animal Production and Health Division (AGA) have an on-going and mutually beneficial partnership. IFIF represents a sector that plays a leading role in the global food industry with an estimated annual turnover of US\$85 billion worldwide. Its members account for some 85 percent of the global animal feed market and include regional federations in South America, Asia (includ-

ing China), Europe, North America and Africa.

Although currently serving primarily a mature, slower growing market in developed countries, the global feed industry continues to expand, both in volume and value, in response to the demand arising from an increasing world population, urbanization and growing consumer purchasing power. Currently, there are an estimated 8 000 plants worldwide, with

capacities greater than 25 000 tonnes per year, manufacturing animal feed along with facilities producing pre-mixes and other high-value products. Together, these plants manufacture more than 635 million tonnes of animal feed annually. Each year confidence and understanding between FAO and IFIF grows as the relationship develops and matures. Every year, new areas of common interest arise which lead to joint activities to help ensure a safe, sustainable and responsible feed sector. Areas of beneficial collaboration include the implementation of codes of practice - such as those of the Codex Alimentarius; improving the dialogue with the public sector; contributing to the development of private sector associations in less economically developed countries and ensuring that small and medium scale enterprises in those countries are included.

As a global organisation, the International Feed Industry Federation (IFIF) believes it has a responsibility to assist developing countries, especially those where there are no national feed associations, to develop their animal feed sectors. In the late 1990s, IFIF received Codex Alimentarius NGO status which provided a first step to better understand how our industry is regulated by governments. At the same time, we began developing a close working relationship with FAO.

Participating in Codex and FAO meetings, IFIF has been able to follow-up on the development and harmonization of international codes, standards and practices that impact feed manufacturers worldwide. Specifically, IFIF has followed up the development of the Codex Code of Practice of Good Animal Feeding; participated in the Codex electronic working group on animal feeding; supported an FAO Expert Consultation on Protein Sources for the Animal Feed Industry; and has developed the joint, biannual Global Feed and Food Congress. It has



## A view from the European Feed Manufacturers' Federation (FEFAC)

also developed with FAO a Manual of Good Practices for the Feed Industry and most recently established a meeting point for feed associations and feed regulators at an annual International Feed Regulators Meeting. IFIF believes that through greater co-operation, especially with organizations such as FAO, and using sound scientific and technological advances it can make a difference in ensuring that food is safe, plentiful and affordable to all.

**Roger D. Gilbert**  
Secretary General, IFIF

In 2009, FEFAC celebrates its 50th Anniversary and 10 years as an observer at the Codex Alimentarius Commission. In the wake of several food safety crises (bovine spongiform encephalopathy, dioxin contamination, etc.), Codex in 1999 set up its first Task Force on Animal Feed. FEFAC agreed to offer its industry expertise to support Codex and FAO in the area of food safety related animal feed standards. The adoption of the Codex "Code of practices on good animal feeding" in 2004 was a milestone for the feed industry as it demonstrated the importance of tackling the safety

of food of animal origin at its source and recognized feed production as an integral part of the global food chain. FEFAC has found the IFIF/FAO International Feed Regulators meetings highly beneficial, as they provide the only global platform addressing feed safety challenges through an open dialogue between the feed regulators and the feed industry.

FEFAC members are extremely grateful to FAO which has initiated groundbreaking steps to develop a consistent framework for a global livestock policy. We are convinced that the focus on

the contribution of livestock producers to food security and poverty reduction, while addressing environmental challenges, will ensure that ailing rural economies benefit from the increasing demand for animal proteins. Knowledge dissemination, technology transfer and training are key tools which our industry can provide to achieve agricultural sector development. FEFAC therefore looks forward to further its cooperation with FAO in this crucial area of development.

**Alexander DÖRING**  
Secretary General, FEFAC

## Going regional: FAO support to the development of regional associations

Sindirações, the Brazilian Feed Industry Association, joined the International Feed Industry Federation (IFIF) six years ago. It was convinced of the importance of a global feed union, where feed producers would speak with "one voice" for the feed industry and to establish a common agenda to promote the food safety and security. During this period, Sindirações has developed an open and fruitful cooperation among feed industry repre-

sentatives worldwide (Brazil, Europe, China, USA, South Africa, etc.) as well as FAO which resulted in many valuable accomplishments.

However, despite our active participation in IFIF, the need for a Latin American and Caribbean feed industry association was strongly felt. We needed a unified voice from the region! When the Mexican Feed Producers Association joined IFIF it made the task easier. After many trips and

long meetings we finally succeeded - FeedLatina was born in 2008 with Brazil, Mexico, Argentina and Cuba as its founding members. Today, FeedLatina has started building up its agenda, where FAO's support is fundamental. The job is tremendous, we are more than 30 countries producing an estimated 130 million tons of feed annually and yet many feed producers are not even associated within an organization.

I am sure that in Latin America and the Caribbean we share the following priorities to: increase food security and safety; harmonize legislation and regulations; and stimulate trade of agricultural products. To achieve these goals, FAO support, with its human resources, political influence and financial stimulus, is a must.

**Mario Sergio Cutait**  
President FeedLatina



## A personal recount from past IFIF president

The collaboration between IFIF and FAO has evolved with both partners supporting each other's complementary mandates. Initially it was a shared objective to make the Codex Code of Practice on Good Animal Feeding work at the industry level that brought IFIF and FAO together. To accomplish this, we both realized that the different assets, expertise, raw materials and cultural diversities of the different regions of the world

had to be harnessed. Our first collaborative effort to bridge these regional differences and establish a uniform standard for safe and efficient animal feed production would be a manual. The Manual of Good Practice for the Feed Industry would be written by IFIF from the private sector's perspective of how to implement the Codex Code and then submitted to FAO for review, approval and distribution internationally. To introduce and implement the

guidelines, particularly in the developing countries, IFIF believed the most effective approach was for FAO and IFIF to work together on a coordinated programme. Of course, I am pleased to say our partnership grew the more we worked together. To date we have held two successful Global Congresses together, several training meetings (Egypt, Kenya, South Africa, etc.) and we jointly hold the International Feed Regulators meetings. In closing it is my view that a more active and transparent relationship with FAO has served our Federation well. Looking back all those years of travelling to Rome to discuss the issues of the day, have lunch or dinner and then get back on a plane and fly home, while informative and helpful,

pales in comparison to the vibrant relationship we share today.

I would recommend to any private sector organization to approach FAO in the same way. If you do, the world and humanity will benefit.

**Fred Stephens**  
Past President IFIF

# SFMA

SERBIAN FEED MANUFACTURERS ASSOCIATION

SERBIA



SRBIJA

**Year of Foundation:** 2004  
**Members:** 40  
**Feed Production:** 493 761 tons

**In 2008:**  
**Members:** 50  
**Feed Production:** 823 451 tons

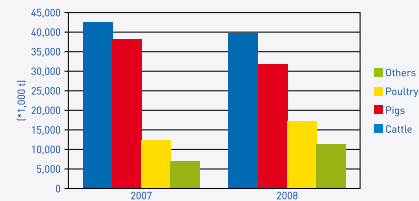


## KEY NUMBERS

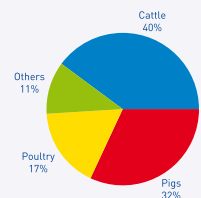
about the livestock population (2008):

Cattle:	39 900 000
Pigs:	31 900 000
Poultry:	17 100 000
Others:	11 100 000

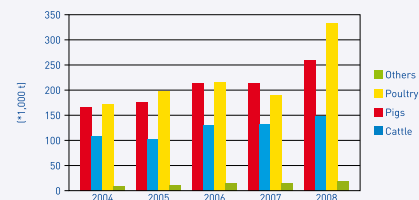
Structure of livestock



Industrial compound feed production per categories



Evolution of compound feed production



# MagnaVita

HOLDING A.D.



[www.magnavita.rs](http://www.magnavita.rs)

Srbija, Novi Sad, Futoška 2  
 Tel/fax: +381 (0)21 654 69 88, 654 69 89  
 E-mail: office@magnavita.rs

- A leading animal feed producer with a wide network of buyers in six South East European countries.
- Innovative driven feed producer with own R&D facilities and laboratory
- Four geographically spread production sites with 180,000 tons of installed production capacities



*Farmers' partner*



### The Veronesi Group

Satisfying consumer tastes and expectations is our daily commitment, anticipating and enhancing their desires is our challenge

The Veronesi Group is the sixth largest Italian Agrifood company (2008 net turnover equal to 2,224 million €), the national leader in animal feed products carrying the Veronesi trademark; first company in Europe within the poultry sector, bearing the AIA trademark; and amongst the first leading Italian producers of charcuterie products with Negroni, Montorsi, Fini Salumi and Daniel trademarks.

Its organization includes four operational divisions: Agrifood & Livestock Breeding Division, Fresh Products Division, Charcuterie Division and Services Division.

The first plant belonging to the Veronesi Group, operating in the animal feed production field, was built in 1958 by the family patriarch Apollinare Veronesi. The strides that have been taken since then led to the establishment of another six feed-producing factories that flank the one originally set up 50 years ago in Quinto di Valpantena (Verona). The founder Apollinare Veronesi turned then his interest towards new challenges in other production sectors, leading the business with great intuition and curiosity. He successfully viewed scenarios before others did, investing his funds in innovative technologies, opening up new markets and then developing them.

The Agricola Italiana Alimentare S.p.A. company was founded in 1968, working in the field of animal husbandry, the production and marketing of poultry, rabbits and eggs both in Italy and abroad. In the matter of twenty years' time, the company became the leading Italian trademark in this sector - well-known to its vast clientele under the AIA acronym.

In 1975 the company inaugurated the pork meat sector, with the production of model livestock breeding farms and the progressive acquisition of historical charcuterie factories such as

Montorsi, Italsalumi and (in 2002) Negroni - the most illustrious Italian producer of charcuterie.

The Group's strong points have always been its great involvement in innovation/research and its complete control over the entire production chain, even prior to this term becoming synonymous to product traceability.

Control of the integrated chain begins with animal feed, continuing with breeders, incubators, animal husbandry, butchering and processing, up until final product distribution. It is an extremely rigorous organization model, that places safety at the top of the list and carries out spot-checks at every stage of the process.

Today 13% of the Group's turnover is within international markets, turning it into an ambassador of the "Made in Italy" label that reaps so much success even in countries that are very distant from Italian food traditions - another reason for their being so attracted to its best products.

The company today produces more than 2.6 million tonnes of animal feed annually, thanks to the efficient work of 7 plants stationed all over the national territory. These important results confirm the Veronesi trademark as leader in the Italian sector, with a 20% market share.



In the picture: Veronesi feed plant in Acquaneгра Cremonese



Guaranteeing quality and competitiveness for our partner livestock breeders.

# ASSALZOO

ASSOCIAZIONE NAZIONALE TRA I PRODUTTORI DI ALIMENTI ZOOTECNICI



**Year of Foundation:** 1945  
**Members:** 22  
**Units:** 22  
**Feed Production:** 300 000 tons

**In 2009:**  
**Members:** 100  
**Units:** Feed: 122  
 Premix: 26  
**Feed Production:** 14 200 000 tons

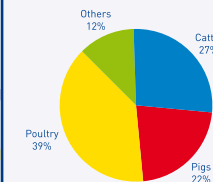


### KEY NUMBERS

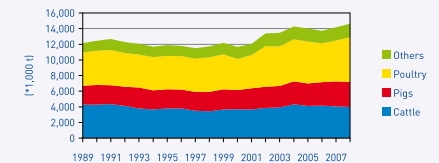
about the livestock population:

Cattle:	6 577 000
Dairy Cows:	1 839 000
Pigs:	9 272 000
Poultry:	450 500 000
Sheep:	7 265 000
Goats:	972 000
Layers:	57 400 000

### Industrial compound feed production per categories



### Evolution of compound feed production



# Future challenges and key achievements of the European feed industry and FEFAC

## A “forward-looking” retrospective

This year, FEFAC is celebrating its golden jubilee – a suitable occasion to look back at its past and into its not too distant future. The history of the Federation began on 6 July 1959 when FEFAC was set up as European umbrella federation of the compound feed industry (Fédération Européenne des Fabricants d’Aliments Composés, European Feed Manufacturers’ Federation) by the five founding members from France, Belgium, Germany, Italy and The Netherlands. The Belgian Joseph Laga was elected first President at the constituting General Assembly.

It all started with the Stresa Conference that resolved the first Common Agricultural Policy (CAP) of the European Community in 1959. The feed industry is one of the “pioneers” in the agricultural sector that began to play an active role in structuring and implementing the CAP. Lobbying for the development

and implementation of regulatory measures via joint representation, communication and coordination at European and international level remains the key pillar of the FEFAC efforts right up to the present.

Eventful times began. The Federation and its Members experienced “stormy” and successful “economic miracle” years as well as difficult crises events, most particularly the BSE crisis. FEFAC has now grown to accommodate 27 feed industry associations from the EU Member

States and their neighbouring countries with app. 4,000 feed plants providing more than 100,000 direct jobs often in rural areas with few job alternatives. FEFAC represents their interests at the level of the European Institutions. It is part of the founding mandate of FEFAC to draw attention to fundamental developments at an early stage so that the European feed industry can provide the political decision-makers promptly with information, analyses and proposals. The goal is to achieve practical solutions which enable the

sector to provide safe, affordable and performance-promoting feed meeting maximum quality and safety requirements to the livestock farms. The thematic areas of sustainable competitiveness of EU feed and livestock production and food/feed safety are the two current strategic priority areas of the FEFAC work. However, the initial areas of activity defined by the FEFAC founding fathers are all still relevant today:

- Continuously surveying the Common Agricultural Policy;
- Monitoring the common agricultural markets and agricultural structures/policies;
- Promoting and maintaining a coherent feed policy;
- Improving purchase contracts and promoting the quality of raw materials;

During the BSE problems, I always said, at meetings, that the feed industry was something to be proud of. FEFAC members responded by turning what might have been a crisis into an opportunity and proving to the authorities and consumers that by working together there could be a ‘common sense’ approach to feed safety assurance. This produced the - European Feed Manufacturers’ Guide - and from this grew an industry of strength, taking with it others in the feed supply business.

Pat Lake, former FEFAC President

• Exclusion of by-products stemming from the agro-food industry from the EU waste list of the waste transhipment Directive.

1993

• Entry into force of Single Market.

1993

• 35<sup>th</sup> FEFAC Anniversary: André Namur says goodbye to the profession and welcomes his successor, Alexander Döring.

1994

• Signature of the Marrakech WTO Agreements (outcome of Uruguay round including agreement on Agriculture and Sanitary and Phytosanitary measures, SPS).

1994

- Examining the perspectives of compound feed production and its degree of market penetration;
- Fostering the development of animal production and monitoring the consumption prospects with consideration given to the political, economic and technical environment;
- Ensuring fair and efficient feed law in line with progress in animal nutrition sciences;
- Contributing to consumer health and the environment;
- Follow-up of general economic problems and the enlargement process of the European Union;
- Developing public relations and sharing experience in the feed industry.

### Future challenges

It is clear that the challenges to be faced by the European feed industry will be at least as demanding in the coming years as they were in the past. On the one hand, global demand for food of animal origin is rising; on

the other hand, the competition for usable agricultural land is increasing. Furthermore, the global focus is on conservation of natural resources while reducing environmental impacts linked to agricultural production. The improvement in feed conversion and the transformation of by-products of the food industry, and the renewable energy sector into high-grade animal proteins are key tools to the cost-effectiveness and sustainability of the food chain and renewable energies from biomass. The European feed industry needs a science-based EU legal framework which stimulates innovation to be able to fully exploit its potential to meet the increasing market and political demands regarding sustainable and competitive livestock production.

The demand for a fact-based, transparent information and exchange of opinions with the competent authorities of the European Commission, the members of the European Parliament in the coordinating committees and the negotiation leaders in the Council of Ministers at the beginning and during the discussion periods for new legislative projects will only grow further. The EU decision-making process for new legislative acts has become ever more complex and time-consuming. Only an efficient European trade association, which in close interaction with the national associations and the affiliated companies and through networking and strategic partnerships with other chain partners, can provide the right

information at the right time to the right decision-makers.

### Key achievements

Agricultural markets:

- Elimination/prevention of compulsory blending requirements of grain in compound feeds;
- Abolition or reduction of customs duties on imports of protein-rich plant raw materials;
- Withdrawal of the coresponsibility levy for the processing of cereals in compound feed following litigation before the European Court of Justice;
- Reduction of monthly increments distorting grain prices on the internal market;
- Resale(s) of grain and SMP from intervention stocks, i.e. setting of zero-import duties for grains in situations of acute market shortages.

FEFAC members successfully defended their intellectual property rights with regard to feed formulations in ground-breaking actions in the Court room and at EU institutional level. By being proactive rather than reactive on issues of great importance to all partners in the feed and food chain, FEFAC also gained respect and acceptance for its initiatives with other parties in the feed and food chain and also with the relevant authorities.

Bob Armstrong, former FEFAC Deputy President



## EU feed and food law:

- Harmonisation of the European Feed Law, beginning in 1970 with the publication of Directive 70/524/EEC on the authorisation of feed additives, (provisionally) ending in 2009 with the adoption and publication of the new Regulation on the placing on the market and the use of feed;
- New principles of Feed Law, strongly influenced by the European Parliament through the co-decision procedure since 1999, are based on the General Food Law Regulation (EC) No 178/2002 that entered into force in 2005 in the aftermath of the BSE & Dioxin crises and attributes primary responsibility for food safety to the feed and food business operators;
- Feed Hygiene Regulation (EC) No 1831/2003 that entered into force at the beginning of 2006, as legal basis for developing the first Community guide to good practice for the EU industrial compound feed and premixtures manufacturing sector for

food-producing animals (EFMC) that was developed by FEFAC experts and positively assessed by the EU Standing Committee on Animal Nutrition in January 2007. The EFMC has been used as a reference document in more than 20 national feed industry codes;

- Removal of the compulsory labelling of percentage inclusion rates of feed materials in compound feeds following litigation before the European Court of Justice.

## Acknowledgements

At this point, the FEFAC Secretariat would like to express its thanks to all its very active National Associations, their affiliated member companies and experts who have made such major contributions to the FEFAC success story in the past 50 years. We would also like to express our appreciation of the excellent cooperation with partner federations and organisations from the entire food chain, without which it would not have been possible to successfully represent joint interests. FEFAC

Members are fully committed to the EU policy and common food chain objective of providing safe, secure and sustainable feed and food in the 21<sup>st</sup> century to consumers in the European Union and worldwide.

**Raw materials naturally improved for a better performance with our opticon® - technology!**

**optigrain®**  
the taste of success  
mechano-hydrothermal processed grain package for your piglet feed production

**deukalac UDP 39**  
by-pass protein in best fashion  
the „plus“ for the needs of high yielding cows

*Competence by Innovation*

Deutsche Tiernahrung Cremer GmbH & Co, KG  
Postfach 10 19 45, 40010 Düsseldorf, Germany  
Telefon: +49 (211) 30 34-351, Fax: +49 (211) 30 34-224  
www.deuka.de, futterkonzepte@deutsche-tiernahrung.de

- 1997**
- FEFAC initial position of the modernisation of EU feed legislation.
  - XX<sup>th</sup> FEFAC Congress in Edinburgh (UK).

**1997**

- Signature of the Amsterdam Treaty amending the EU and EEC Treaties with transfer of co-decision powers on Food & Feed safety legislation to the European Parliament.
- Creation of the Food and Veterinary Office.
- EP adopts BSE report of rapporteur Reimar Böge with 167 policy recommendations.

- 1998**
- Publication of FEFAC guidelines for the development of national codes of practice for the manufacturing of animal feed.

**1998**

- EU "de facto" moratorium on GMO approvals (1998-2003).

# DVT

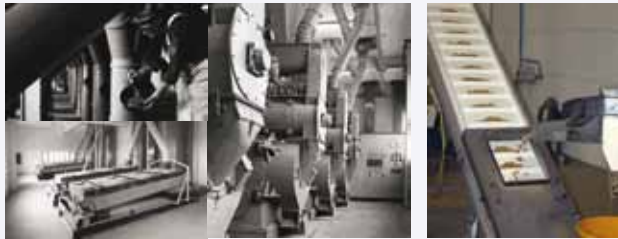
DEUTSCHER VERBAND  
TIERNÄHRUNG E.V.



DEUTSCHLAND

Year of Foundation: 1918

In 2008:  
Members: 252  
Units: Feed: 204  
Premix: 45  
Feed Production: 13 900 000 tons

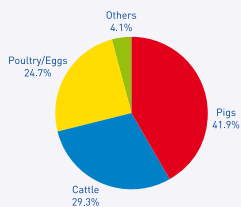


## KEY NUMBERS

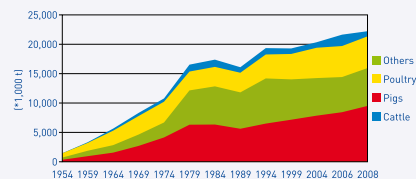
about the livestock population:

Cattle:	12 987 543
Dairy Cows:	4 229 138
Pigs:	26 380 900
Poultry:	128 463 000
Layers:	38 463 704

Industrial compound feed production per categories



Evolution of compound feed production



GERMANY

# TÜRKIYEM-BİR

TURKISH FEED MANUFACTURERS ASSOCIATION



TÜRKİYE  
CUMHURİYETİ

Year of Foundation: 1974  
Members: 7  
Units: 6  
Feed Production: 218 975 tons

In 2008:  
Members: 198  
Units: 470 (active)  
Feed Production: 9 560 617 tons

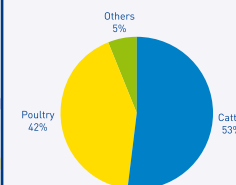


## KEY NUMBERS

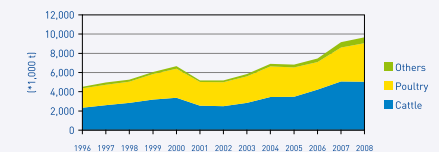
about the livestock population:

Cattle:	10 526 440
Pigs:	1 934
Poultry:	5 420 000
Laying Hens:	60 276 000
Goats:	6 517 464
Sheep:	25 304 325
Broilers:	257 221 000

Industrial compound feed production per categories



Evolution of compound feed production



TURKEY

# Compound Feed Production in the EU

1959



5	Member Associations	27
6,500 t	Average size of production units	35,000 t
12.5 mio. t	Production of compound feed	145 mio. t
2.8	Feed conversion rate for poultry	1.7

2009



FEFAC

Between 1959 and 2009, the picture of the compound feed market has dramatically changed: the production units have increased their production capacity, a process which is still ongoing in particular in new EU Member States; the production of compound feed has considerably increased, partly because of successive enlargements, partly because of the increase in production of animal products but also because of the increasing market share of industrial compound feed vs. home mixing. These favourable elements were, however, partly offset by the spectacular improvement of the efficiency of compound feed, with feed conversion rates (the amount of compound feed necessary to produce 1 kg of products of animal origin)

having dropped from 2.8 to 1.7 as regards poultry, a similar trend being observed for other animal species.

## Compound feed production in the EU: a success story

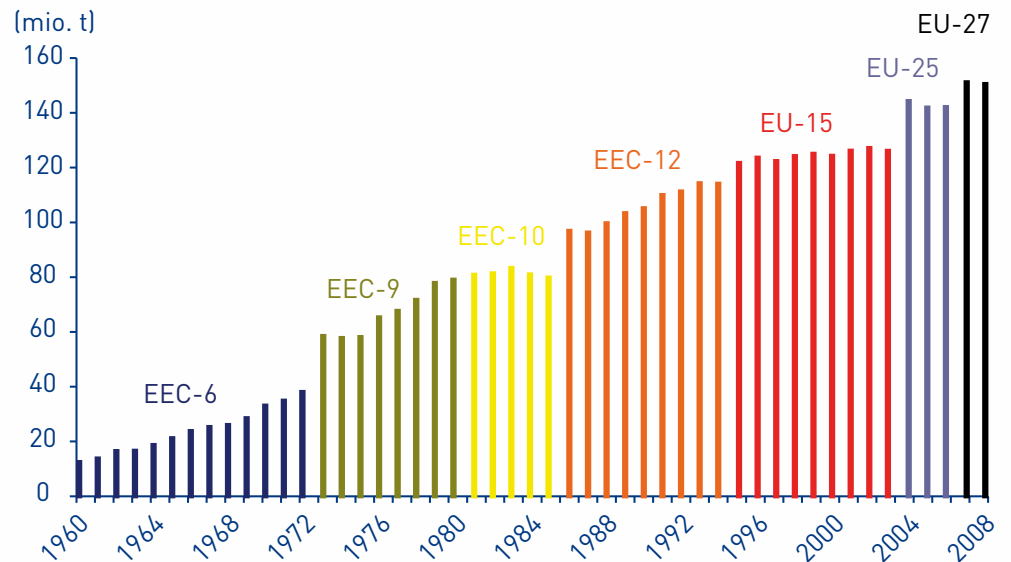
Compound feed production in the EEC-9 grew by over 7.5% per year during the 60s and early 70s. This reflected the development of the demand for animal products closely linked to the increasing purchasing power. In addition, particularly in the pig and poultry sectors, production was becoming more intensive requiring greater use of industrial compound feed to meet high performance and quality requirements.

For the remainder of the 70s, annual average growth in EEC-9 compound

feed production slowed down to a rate stabilising at only 4.4%. This lower rate partly reflected the effects of the 1973 "oil price shock" on consumers' incomes. After a period of steady increase from the mid 80s on, consumption of all livestock products grew more slowly, because of the saturation of the EU-15 market and because of increasing consumer

concern about health matters and animal welfare. From 1996 on, the compound feed production suffered from the impact of the BSE crisis, which resulted in a 9% reduction in cattle feed in 1998 compared with 1995. This decrease was offset by a parallel growth of consumers' demand for white meat. As a result, compound feed production

## Development of the EU industrial compound feed production from 1960 to 2008



• FEFAC becomes observer member in FAO/ CODEX Alimentarius.

1999

- EU Dioxin action plan following PCB/Dioxin contamination of feed fats in Belgium.
- Transfer of competence for feed legislation from DG AGRI to DG SANCO.

1999

• FEFAC participation in the CODEX Task Force on safety of animal feed (2000-2004).

2000

2000

- Adoption of the Commission White Paper on food safety containing 85 legal measures thereof 15 specific to feed.
- 2<sup>nd</sup> BSE crisis (first confirmed cases in Germany, Spain and Italy) and adoption of the EU feed ban for processed animal proteins.
- Adoption of CAP reform "Agenda 2000" proposing a.o. to eliminate monthly increments for intervention cereals.

in the EU has remained almost stable since 1996. The 2004 and 2007 enlargements brought some further 20 mio. t of compound feed to the EU production.

**Feed material consumption: not much dramatic changes in average composition of a compound feed**

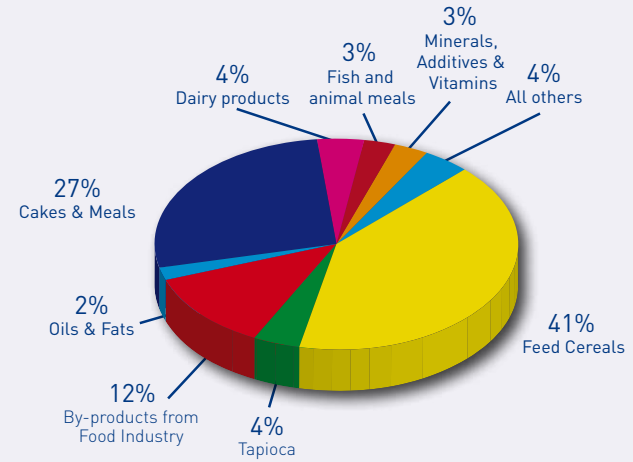
If we compare the composition of a compound feed in 2008 vs. 1970, we realize that the average inclusion rates of the key categories of feed materials, i.e. cereals and oilseed meals, have not changed dramatically over time. A more detailed analysis would, however, show that within the categories, changes have occurred (e.g. development of rapeseed meal as a substitute to soybean meal). Certain categories of feed materials have almost disappeared (e.g. tapioca or animal meals) and some others have emerged (e.g. pulses) but the basic elements remain the same.

The interconnection between animal feed and food from animal origin: a long-standing conviction for FEFAC, reflected in its statistical brochure "Feed & Food".

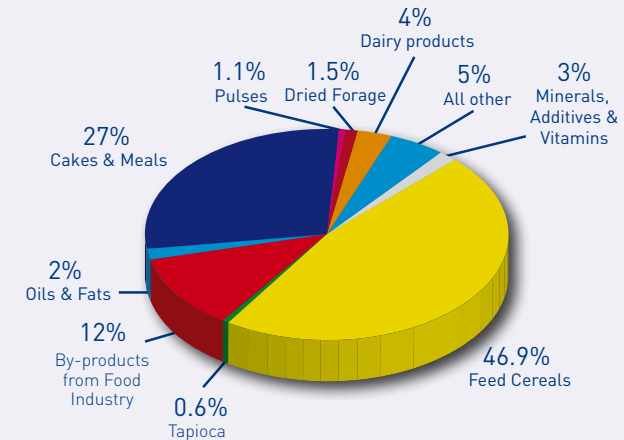
**EU compound feed production today**

With an annual production of 151 mio. t of compound feed (2008) accounting for an estimated turnover of 45 bio. €, representing a share of app. 21% of the global production volume of altogether about 700 mio. t of compound feed, the EU compound feed operators rank equally with feed producers from the USA as world market leaders. China (more than 100 mio. t) and Brazil (app. 60 mio. t) account for a further 20% of world production. Pig feed represents a market share of 35% or app. 50 mio. t, followed by poultry feed with 33%, i.e. 48 mio. t and cattle feed with a market share of 25% or app. 35 mio. t. Other feeds account for app. 8% with milk replacers estimated at app. 1.6 mio. t and fish feed at around 1 mio. t of production.

**Feed material consumption by the compound feed industry in 1970 in the EEC-6**

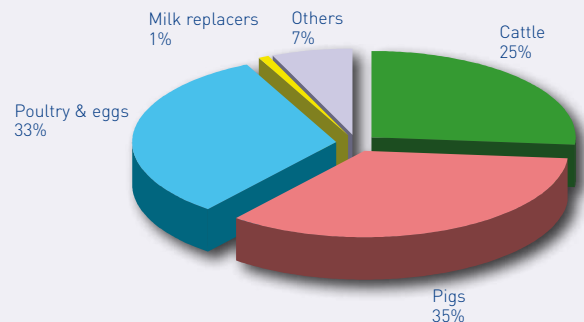


**Feed material consumption by the compound feed industry in 2008 in the EU-27**

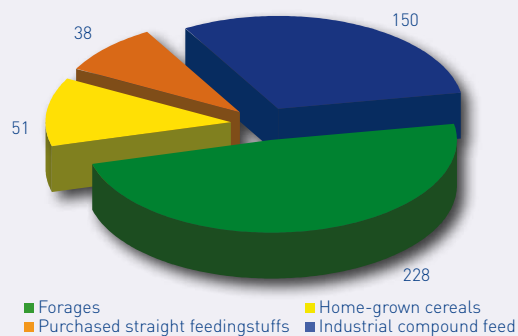


- 2001**
  - Introduction of HACCP-Principles in FEFAC guidelines for the development of national codes.
  - Signature of the Nice Treaty reforming the institutional structure of the European Union and its decision-making process.
  - Adoption of TSE Regulation (EC) No 999/2001.
- 2002**
  - Independent Benchmarking of national codes to good feed manufacturing practice.
  - Setting up of the Premix & Mineral Feed Committee.
  - FEFAC/EU feed safety workshop on MPA contamination of glucose syrup.
  - Introduction of the €.
  - Adoption of the General Food Law (Regulation (EC) No 178/2002).
  - Adoption of Directive 2002/2/EC introducing mandatory percentage declaration of feed materials present in compound feedingstuffs.
  - Adoption of the Directive 2002/32/EC on undesirable substances in animal feed.
  - Recasting of Animal By-Products legislation (Regulation (EC) No 1774/2002) including EU ban on the feeding of catering waste and intra-species recycling.

## Industrial compound feed production per category (150 mio. t in 2008)



## Livestock sourcing in feed in the EU-27 (467 mio. t in 2008)



# AFPWTC

THE ASSOCIATION OF FEED PRODUCERS,  
WAREHOUSE - KEEPERS AND TRADE COMPANIES



SLOVENSKÁ  
REPUBLIKA

**Year of Foundation:** 1964  
**Members:** 45  
**Units:** 45  
**Feed Production:** 443 700 tons

**In 2008:**  
**Members:** Feed compounders: 29  
Premix companies: 3  
**Units:** Feed: 29  
Premix: 3  
**Feed Production:** 834 000 tons

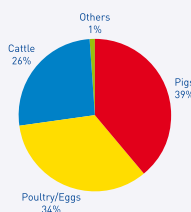


### KEY NUMBERS

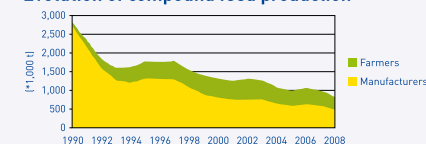
about the livestock population:

Cattle:	487 000
Dairy Cows:	213 000
Pigs:	770 000
Poultry:	14 200 000
Sheep:	361 000
Goats:	37 500
Layers:	6 100 000

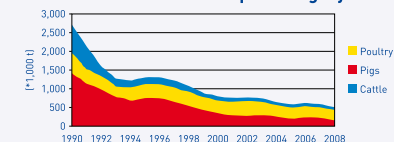
### Industrial compound feed production per categories



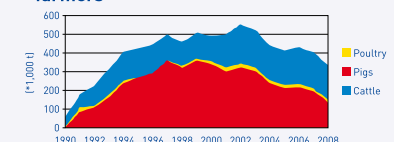
### Evolution of compound feed production



### Evolution of compound feed production industrial manufacturers per category



### Evolution of compound feed production - farmers



- Setting up of the Fish Feed Committee.
- Review of the FEAC Statutes and governance to prepare for EU enlargement to 10 new Member States.

2003

- Adoption of the Regulation (EC) No 1831/2003 on additives for use in animal nutrition.
- Adoption of the Regulation (EC) No 1829/2003 on genetically modified food and feed.

2003

# GZS

CHAMBER OF COMMERCE  
AND INDUSTRY OF SLOVENIA

Gospodarska  
zbornica  
Slovenije



REPUBLIKA  
SLOVENIJA

Year of Foundation: 1997

In 2008:  
Members: 9  
Units: 16  
Feed Production: 484 000 tons

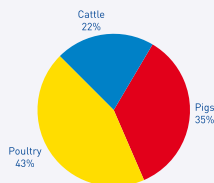


## KEY NUMBERS

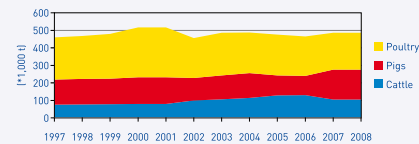
about the livestock population:

Cattle:	472 363
Pigs:	544 405
Poultry:	5 364 220
Sheep:	135 887
Goats:	34 593

Industrial compound feed production  
per categories



Evolution of volumes of purchased  
compound feedingstuffs



SLOVENIA

# CESFAC

CONFEDERACIÓN ESPAÑOLA DE FABRICANTES  
DE ALIMENTOS COMPUESTOS PARA ANIMALES

cesfac



ESPAÑA

Year of Foundation: 1978  
Members: 22  
Units: 45  
Feed Production: 443 700 tons

In 2008:  
Members: 354  
Feed Production: 19 908 000  
(estimates)

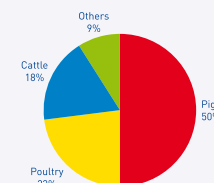


## KEY NUMBERS

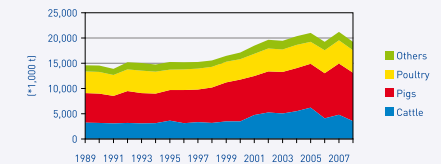
about the livestock population:

Cattle:	6 653 000
Pigs:	9 604 000
Sheep:	22 730 000
Goats:	2 833 000
Layers:	4 459 000

Industrial compound feed production  
per categories



Evolution of compound feed production



SPAIN

# „Hall of fame“

## FEFAC Presidents

1959 - 1962	Joseph LAGA	(BE)
1962 - 1965	Gerrit VAN NIEWENHUIZEN	(NL)
1965 - 1967	Joseph LAGA	(BE)
1967 - 1968	Maurice WEBER	(FR)
1968 - 1971	Arthur KUEHN	(DE)
1971 - 1973	Antonio FERRARI	(IT)
1973 - 1975	Oscar DEWILDE	(BE)
1975 - 1977	Ken J. ARNOTT	(IE)
1977 - 1981	Christian F.A. BOTZENHARDT	(DE)
1981 - 1985	Gerrit KINGMA	(NL)
1985 - 1989	Brian RUTHERFORD	(UK)
1989 - 1993	Francesco FERRARI	(IT)
1993 - 1996	Bernard DESRUELLE	(FR)
1996 - 2001	Pat LAKE	(UK)
2001 - 2004	Yves MONTECOT	(FR)
2004 - 2007	Martin J.M. TIELEN	(NL)
2007 - 2010	Pedro CORRÊA DE BARROS	(PT)

## Honorary members

Hubert MAREK	(AT)
Marcel VAN BELLE	(BE)
Carl BRENNINKMEIJER	(NL)
André NAMUR	(LU)
Franz-Josef JUCHEM	(DE)
Giordano VERONESI	(IT)

### 50 years FEFAC: from Re-active to Pro-active

The most important change to my opinion in the last decennia for FEFAC was to convert from a defensive to a pro-active role in the different fields of interest. FEFAC was in the frontline of the EU-lobbying actions to improve cooperation, communication and confidence. This pro-active approach realised a constructive contribution to the safety of food, the sustainable production of feed ingredients, the increase in effectiveness and economy of feed production and the positioning of FEFAC as a reliable player in the food production chain. It was a privilege for me to act in this turbulent period as President of FEFAC and to have a humble contribution to these developments. This happened always in an environment of people who collaborated with me in an open mind. The future of FEFAC lays in this pro-active and open approach, moving even closer to the consumer and the citizen to make “feed for food” quite understandable.

Martin Tielen, immediate past FEFAC President

2004

- 5th enlargement to Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia, Slovenia.
- EFSA moves to Parma Headquarters.

- FEFAC resumes membership in reformed International Feed Industry Federation (IFIF).
- Adoption of the CODEX Code on good animal feeding.
- FEFAC launch event for the European Feed Manufacturers' Guide, EFMC.
- The European Court of Justice declares invalid the obligation to inform customers, on request, of the exact quantitative composition of compound feedingstuffs.

2005

- Adoption of Regulation (EC) No 1831/2003 on feed hygiene, including obligatory HACCP-based safety assurance system for feed business operators.

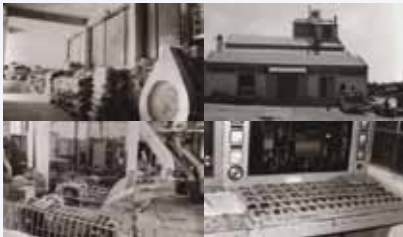
# IACA

ASSOCIAÇÃO PORTUGUESA DOS INDUSTRIAIS  
DE ALIMENTOS COMPOSTOS PARA ANIMAIS



**Year of Foundation:** 1969  
**Members:** 81  
**Units:** 81  
**Feed Production:** 773 000 tons

**In 2008:**  
**Members:** Feed compounders: 53  
Premix companies: 10  
**Units:** Feed: 61  
Premix: 10  
**Feed Production:** 3 280 000 tons



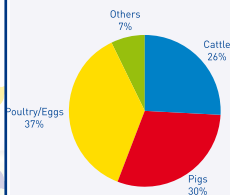
## KEY NUMBERS

about the livestock population:

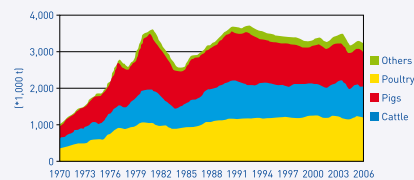
Cattle:	1 442 000
Dairy Cows:	306 000
Pigs:	2 374 000
Poultry:	18 500 000
Sheep:	3 356 000
Goats:	509 000
Layers:	6 300 000



Industrial compound feed production  
per categories



Evolution of compound feed production



PORTUGAL

# VSF

FEDERATION OF THE SWISS  
COMPOUND FEED MANUFACTURERS



**Year of Foundation:** 1933  
**Members:** 6  
**Units:** 6  
**Feed Production:** 25 000 tons

**In 2008:**  
**Members:** 64  
**Feed Production:** 1 502 000 tons

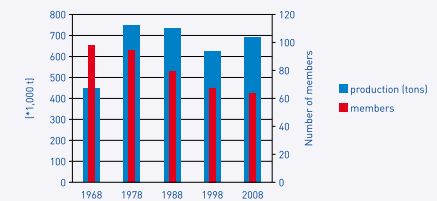


## KEY NUMBERS

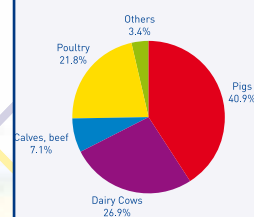
about the livestock population:

Cattle: (incl. cows & calves)	1 607 775
Dairy Cows:	726 500
Pigs:	1 552 000
Poultry:	8 102 000
Fattening Calves:	100 000
Horses:	58 000
Small Livestock:	124 000

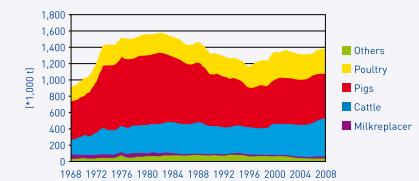
Overview production and members of VSF



Industrial compound feed production  
per categories



Evolution of compound feed production



SWITZERLAND

# Thanks

The FEFAC Praesidium would like to express its gratitude to all the generous sponsors for supporting the 50<sup>th</sup> Anniversary of FEFAC.

Sponsor List (alphabetical order per category):

## GOLD

CEHAVE  
NUTRECO  
VICTAM



## SILVER

IZBA GOSPODARCZA (IZBA)  
MAGNA VITA  
Nederlandse Vereniging Diervoederindustrie (NEVEDI)  
Syndicat National des Industriels de la Nutrition Animale (SNIA)  
VERONESI VERONA



## BRONZE

Associazione Nazionale tra i Produttori di Alimenti Zootecnici (ASSALZOO)  
Associação Portuguesa dos Industriais de Alimentos Compostos para Animais (IACA)  
Deutsche Tiernahrung Cremer GmbH & Co. KG  
Irish Grain and Feed Association (IGFA)  
Vereinigung Schweizerischer Futtermittelfabrikanten (VSF)



- Launch of the EU feed and food chain action for the fixation of a low-level presence threshold for not yet approved GM events in feed and food imports on the base of the CODEX GM plant guidelines.
- Setting up of the EFMC Committee.
- XXIV<sup>th</sup> FEFAC Congress in Porto (PT) and election of Pedro Corrêa de Barros as FEFAC President.

2007

- 6<sup>th</sup> enlargement to Bulgaria and Romania.
- Positive Assessment of the EFMC by the EU Standing Committee on Animal Nutrition.

- FEFAC/EFSA workshop on reauthorisation of feed additives.

2008

- "Health Check" of the CAP – elimination of monthly increments and intervention system for coarse grains.
- Publication of the EU Commission action plan on Sustainable Consumption & Production and Sustainable Industrial Policy.
- Adoption of the revised Waste Framework Directive 2008/98/EC establishing a clear distinction between waste and by-products.

The FEFAC Secretariat wishes to thank the members of the Anniversary Organisation Committee - Messrs Bob Armstrong, Pat Lake, Kees Sijssens, Martin Tielen – for their valuable contribution to ensure the success of this event.

• Adoption of the EC Regulation on the placing on the market and the use of feed.  
 • 7th legislature of the European Parliament.

2009

- Launch of the European Food Chain Round Table on Sustainable Consumption and Production to develop a common methodology for the assessment of the environmental impact of the production and the consumption of food products.
- FEFAC/COPA-COGECA/EU feed & food safety workshop on Dioxin in bread meal in Ireland and melamine in organic soybean meal from China.
- FEFAC celebrates its 50th Anniversary and presents its 1st Environment Report.

2010

• XXVth FEFAC Congress in Hamburg (DE).

**FS**

**FODER & SPANNMÅL**



**KONUNGARIKET SVERIGE**

**Year of Foundation: 1981**



Föreningen Foder och Spannmål (Feed and Grain Association) is a Swedish organisation of companies producing and selling agricultural supplies such as grain, feed, seeds, fertilisers and plant protectants. The association in its modern form was founded in 1981 by a merge of Swedish Grain Merchants (founded in 1911) and Swedish Feed Manufacturers (founded in 1905).

The main purpose is to represent and promote views and interests of the members in Swedish and EU institutions and to support members with relevant information. The association has about 60 member companies with a total turnover of approx 2.8 billion SEK.

**SWEDEN**

# LANTMÄNNEN

SWEDEN



**Year of Foundation:** 1950  
**Units:** 19  
**Feed Production:** 200 000 tons

**In 2008:**  
**Units:** 12  
**Feed Production:** 1 533 000 tons

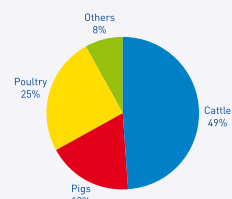


## KEY NUMBERS

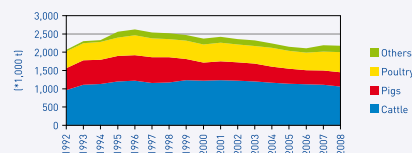
about the livestock population:

Cattle:	705 000
Dairy Cows:	360 000
Pigs:	3 230 000
Poultry:	5 950 000
Sheep:	530 000

Industrial compound feed production per categories



Evolution of compound feed production



# AIC

AGRICULTURAL INDUSTRIES CONFEDERATION



AIC represents the majority of UK compound feed manufacturers, but its membership extends far wider and includes feed merchants, grain merchants, fertiliser manufacturers

and distributors of crop protection products. AIC helps ensure food and feed safety by owning the assurance schemes UFAS, FEMAS and TASSC.

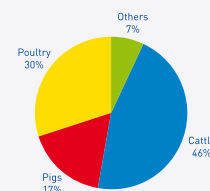


## KEY NUMBERS

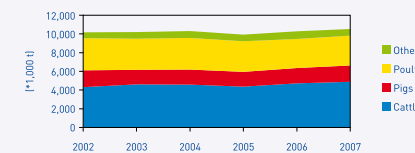
about the livestock population (2007):

Cattle and calves:	10 517 000
Pigs:	4 933 000
Poultry:	167 667 000
Sheep and lambs:	34 722 000

Industrial compound feed production per categories



Evolution of compound feed production



UNITED KINGDOM



FEFAC

FEFAC aisbl

Rue de la Loi, 223 Bte 3 - 1040 Bruxelles

[www.fefac.eu](http://www.fefac.eu)