

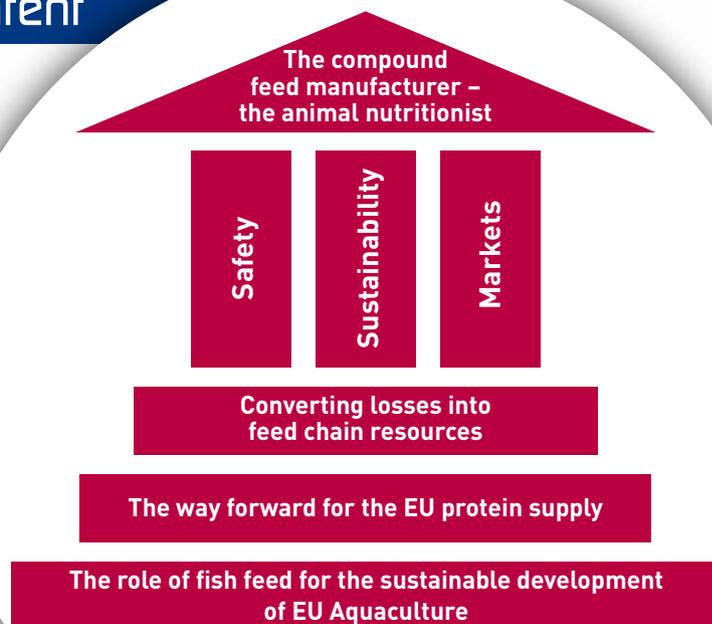


2014

The Feed Chain in Action

**Animal Nutrition –
the key to animal performance,
health & welfare**

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FEFAC aisbl
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1040 Bruxelles (Belgique)
Enterprise n° 0408 295 071
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The pillars safety, sustainability and markets as the foundation for compound feed production

During my first year as FEFAC President, I have witnessed the impressive dynamism and innovative capacity of the compound feed manufacturing companies. Our industry is a vital link within the food chain. We are the largest clients of arable farmers and we are also the largest suppliers of livestock farmers, meaning we are the one linking vegetable and animal production. We therefore need to carefully explain to our supply chain partners how our industry operates within the critical boundaries of three pillars: safety, sustainability and markets. The safety of feed is of course the non-negotiable primary requirement and though a lot has been achieved already, there is still work to be done. Sustainability should be recognised as a given as well – we need to keep in mind that we all share a common responsibility by safeguarding the future of the planet. When looking at the economic market realities, since I became President of FEFAC, I have been strongly committed to fight for a sensible legal framework to ensure competitiveness and avoid weakening our position on the market caused

by non-tariff trade barriers, as can be best illustrated with the need to safeguard market access to the EU protein supply. The feed industry will continue to push innovation to the maximum, but we will need the understanding and acceptance of the policy makers to eliminate unjustifiable obstacles in order to unlock the full growth potential for the sustainable development of the EU livestock sector.

Even though I firmly believe that an increase in sustainable production of animal proteins will both be needed and achievable to feed the world of the future, I think everybody should also recognise the importance of creating a more integrated sustainable food production system. The wastage of resources is something deemed unacceptable. In fact, with the extensive use of co-products and former foodstuffs that derive from food processing industries, we are already making a significant contribution to the sustainability of the food chain, thereof livestock production. Including aquaculture, more than two thirds of our raw materials are

derived from co-product streams of the food and non-food industries, such as the biofuel sector. If we also take into account the ongoing worldwide trend to urbanisation, meaning that even less people will be responsible for feeding the growing populations of cities, the innovative strength of the feed industry is something that should be recognised and acknowledged. I feel the time is right for our industry to seek to widen its audience, as I have become very aware of the fact that societal and market acceptance of our activities solely depends on the visibility and accessibility of the facts and figures linked to our common industry ambition to support the innovation driven sustainability of our EU livestock production to the benefit of consumers in the EU and worldwide.



Ruud Tijssens
FEFAC President

The compound feed manufacturer – the animal nutritionist



The main goal of a compound feed manufacturer is to make the most efficient use of safe and economically viable resources available in order to produce a balanced feed meeting the farm animals' physiological requirements and supporting their performance allowing for an equally efficient, safe and economically viable livestock production. Feed formulators hold profound scientific expertise in animal nutrition, which even surpasses the knowledge that exists on human nutrition. They are part of the five key stages relevant to the activities of a compound feed manufacturer. To secure optimal production, while preserving animal health and welfare, feed manufacturers evaluate the nutritional requirements of the animals and produce a tailor-made cost-efficient feed, based on their knowledge of the nutritional value of a large range of feed materials. It is of key importance to make sure that the nutritional requirements of the animals for all essential nutrients, such as

energy, essential amino-acids, trace-elements and minerals, are met. An imbalance in nutrition can have adverse effects on the animal's performance and severe nutritional imbalance could even affect animal health and welfare. However, in the light of resource efficiency and control

of environmental emissions, it is also important to avoid nutrient wastage and losses. Feed manufacturers help livestock farmers with developing the perfectly balanced feed diet for the benefit of healthy animals, which is the best

Buyer

Engages with traders for the sourcing of feed ingredients needed by the formulator

Formulator

Tells the buyer what nutrients and ingredients he needs and determines the most cost-effective compound feed formulation



Quality & risk manager

Will define and monitor procedures as regards safety and quality and supervise their correct implementation

Feed mill operator

Responsible for the correct installation and maintenance of the manufacturing process (storage, weighing, milling, pelleting, cooling)

Sales force & distribution

Is in direct contact with the livestock farmers to provide nutritional advice

driver for animal performance, for any kind of production system and for all farm animal species. The (formulated) feed will also be adapted to the life stage of the farm animal as, for example, the stages of pre-weaning, post-weaning or post-lactating animals all require specific nutrients. Additional services offered by compound feed manufacturers to the livestock farmers are dietetic feeds for farm animals facing particular stress situations and in the case of sick animals the production of medicated feed, whose use may only be prescribed by a qualified veterinarian. In order to continue the improvement of knowledge in animal nutrition, compound feed manufacturers continuously invest in research and innovation to find the most sustainable alternatives. After all, animals require nutrients and not ingredients.



Prerequisite number one

The supply of safe feed to farm animals is a given. Only when feed safety is guaranteed, can due attention be given to trade or sustainability considerations. Therefore, the FEAC principles state that safe feed is non-negotiable and belongs in the precompetitive part of the feed chain, both for the interest of the livestock farmers, the animals and the final consumer of animal products. After all, safe and

nutritionally balanced feed is an unequivocal requirement for the production of safe animal products, as well as a fundamental right in terms of animal welfare. The EU feed industry has had to learn hard lessons from past feed safety incidents and measures have been put in place to safeguard compliance with the stringent rules posed by the EU, which are in fact among the most demanding at

global level. In many aspects, the requirements imposed on feed business operators are stricter than in the food chain. Besides the logical animal health risk for different farm animals, feed business operators also have to take into account environmental risks while preserving animal performance as well as the human health risk linked to the consumption of animal products.

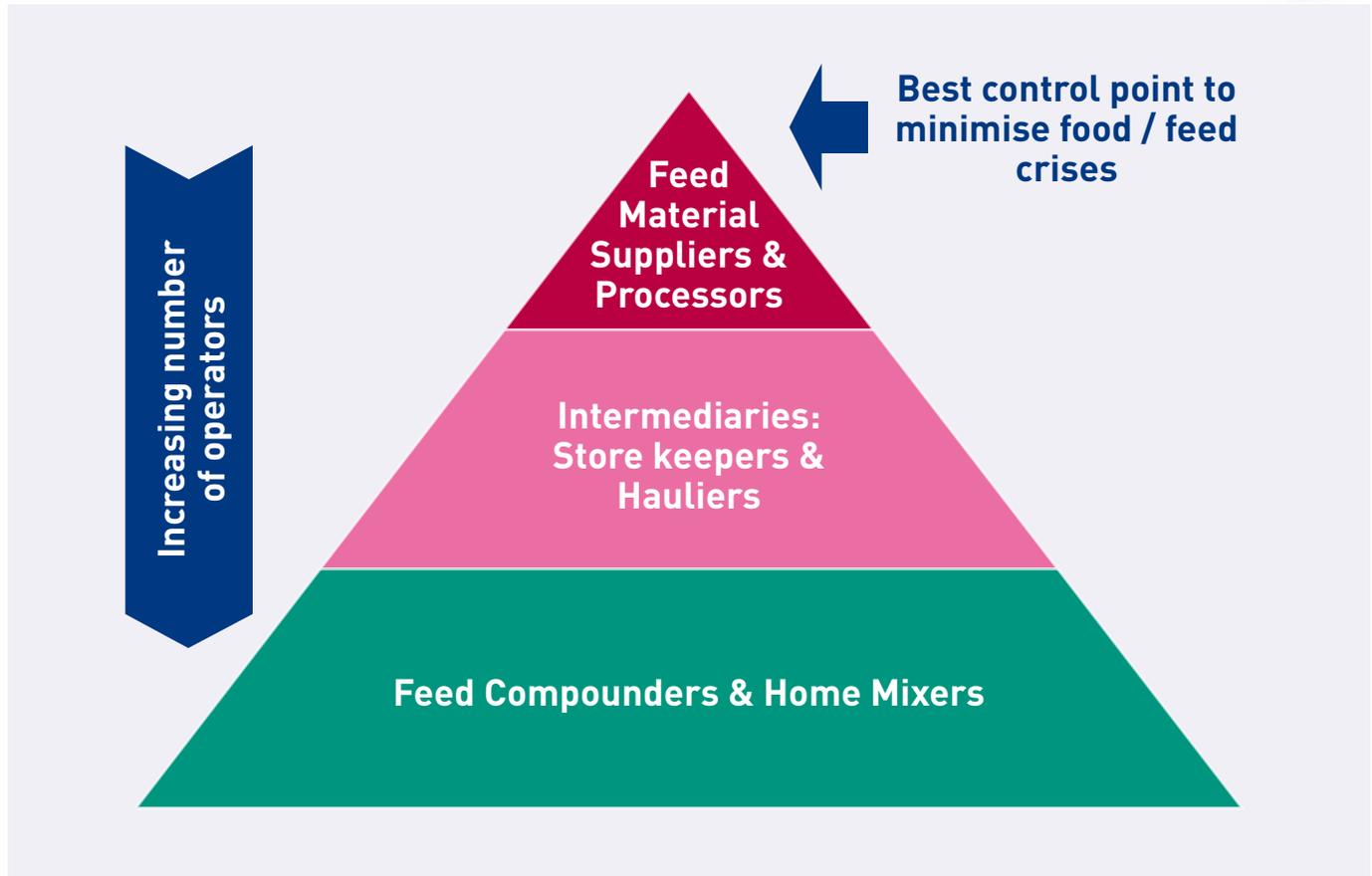


The EU legal framework for safe feed consists of several integrated parts of the EU food safety legislation. Regulation (EC) No 1831/2003 on Feed Additives and the Marketing of Feed Additives Regulation (EC) No 1831/2003 or the Marketing of Feed Regulation (EC) No 767/2009 complete the legislative framework for feed manufacturing. They are all in line with principles laid down in the integrated EU feed and food chain policy that makes feed and food business operators at each stage of the chain responsible for the safety of the products they place on the market. The legislation thus expects individual operators to play an active role in implementing HACCP-based risk management measures. In



order to help premixtures and compound feed manufacturers to implement the legal feed safety requirements, FEFAC developed the EFMC, a community guide to good hygiene practices for feed manufacturing. This has provided operators with a set of tools that contain different HACCP-based risk management strategies, while taking into account the company's risk profile and the different feed safety objectives established by national authorities in areas where this is not fully harmonised at EU level.

In order to build confidence based on transparency between feed chain partners, different sectoral feed safety assurance schemes subject to third party certification have been developed. A primary objective of FEFAC is to foster harmonisation and mutual recognition among these schemes in order to achieve consistency of good practices along the feed chain and improve the monitoring and prevention of contamination. Communication of information throughout the chain on contamination levels has



a significant role to play in order to optimise monitoring plans at feed company level. To this end, FEFAC developed the “top of the pyramid” concept, which is the most cost-effective way to control chemical contamination in the feed chain. According to this

concept, the upstream suppliers of feed materials and additives are held accountable for maintaining compliance with feed safety requirements by implementing effective prevention and monitoring systems when placing their products on the

EU feed market. Downstream operators, including compound feed manufacturers, are to implement risk management systems aiming at verifying the efficiency of the systems of their suppliers as a secondary control tool.

Feed as part of the solution to reduce the need for antibiotics

Reducing the use of antibiotics in livestock husbandry is one of the greatest challenges the livestock sector faces at global level. Antimicrobial resistance has become a serious threat to the effectiveness of currently used antibiotics, both in human medicines and animal production. Already since 1997, FEVAC contributed at both EU and global level to take actions which could help reducing the need for antibiotics at farm level. An important step was the EU ban on the use of antibiotics as feed additives authorised for growth promoting purposes in 2006. As an illustration of the commitment made by the stakeholders involved in the animal production chain, EPRUMA (European Platform for the Responsible Use of Medicines in Animals) was established in 2005 which subsequently released a best practices framework for the use of antimicrobials in food-producing animals in 2008.

A balanced diet that meets the nutritional requirements of the farm animal, as well as controlled farm housing conditions, are important factors that contribute to the minimisation of the need for antibiotics, as animals naturally experiencing optimal health conditions have smaller chances of falling ill and requiring treatment.

Recent research has been able to identify certain feed components that have a positive impact on the animal gut health, a vital element for resistance to infections and diseases. FEVAC considers the need to reduce use of antibiotics in farm animals as one of the key strategic research areas for the EU animal nutrition sector.





Resource efficiency as the key driver for innovation

The FAO foresees a doubling in the demand for animal products by 2050 based on the projections for the growing global population combined with growing disposable income. It is of great importance that this growing demand will be met by sustainably intensified livestock production, which is capable of mitigating adverse effects on climate change. The EU is among the most suitable world regions for raising farm animals in a

global market place, mainly due to favourable European climatic conditions, as agricultural production is largely based on rain-fed crop and forages cultivation, but also thanks to the vast knowledge and experience available. From an environmental perspective, it would make sense for the EU to use its strategic advantage and supply emerging markets to satisfy their demand for more animal products.

Scientific advancements in animal nutrition and animal genetics have allowed for a better nutritional uptake of the consumed feed materials through the quality and the composition of the diets, which have increased animal performance, without compromising animal health. The more efficient the farm animal converts feed into body mass, the fewer feed materials will be needed per animal and thus the smaller is the impact on the environment because of reduced need for raw material resources and transport. The EU feed industry has a history of proven expertise when it comes to the sustainability of livestock farming, with the gradual and constant improvement in the feed conversion rate (FCR) as the most significant success story in resource efficiency. Over the past 30 years, the feed conversion rates have on average been reduced by 30% reaching approximately a level of 1.2 : 1 for farmed fish feed, 1.8 : 1 for poultry feed and 2.5 : 1 for pig feed. The

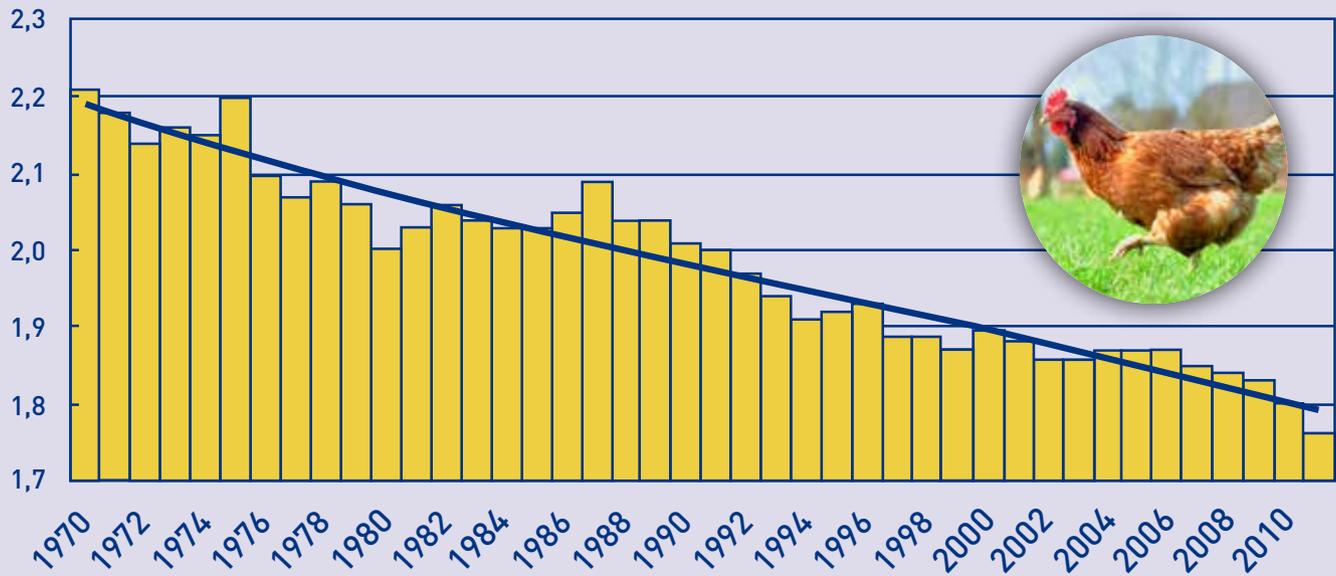


expertise the EU feed industry holds in resource efficiency, which is also expressed through the optimal use of co- and by-products from food and non-food processing industries, is one of the very reasons of its success.

FEFAC members, therefore, share the objective to maintain the current level of improvement of FCR at the same rate until 2030 thanks to joint public and private sector investment in R&D and Innovation.

The feed industry is a science-driven sector where further improvements in resource efficiency are continuously being researched. The development of the innovative landless production of insects and algae

Evolution of feed conversion rate for poultry since 1970 (Source: ITAVI)





FEFAC Road Map to Responsibly Produced Soy

The rapid expansion of soybean cultivation in certain South-American countries in the last two decades has raised concerns about its environmental and social impact. Since 2005, FEFAC has been a member of the global multi-stakeholder RTRS (Round Table on Responsible Soy), which in 2010 adopted its first RTRS standard laying down 5 key principles for partners of the soy value chain to qualify as producers and users of “responsible soy”. In order to facilitate mainstream market supply of responsibly produced soy, FEFAC has set out a Road Map containing a number of key elements.

The EU compound feed and premix industry

- agrees on the common goal of promoting the production and supply of responsibly produced soybean meal to Europe, taking into account key principles of RTRS / or equivalent standards, by cooperating jointly to facilitate mainstream market solutions meeting customer demand;
- develops a regular benchmarking system, which will be transparent and operated independently;
- sets minimum criteria to facilitate the generation of market volume for the supply of responsibly produced soybean meal to European customers;
- proposes a stepwise approach for continuous improvement allowing the building up of market volume;
- communicates regularly with key partners in order to agree on realistic targets regarding the continuous improvement process.

as feed materials is closely monitored, for their nutritional profile is undisputed. In order to bring innovation into practice at farm level and reduce the environmental footprint of livestock production, research platforms that unite animal nutrition knowledge between the academic and the industrial world, such as EUFETEC (European Feed Technology Center) and the Animal Task Force (ATF), of which FEFAC is an active member, are of key importance. EUFETEC considers, for example, that there is still a lot to be gained for livestock farmers by engaging in precision feeding, which could reduce the intake of nitrogen and phosphorus by 30% by 2030, though this still requires additional research. The European Innovation Partnership on Agriculture Productivity and Sustainability launched by the EU Commission with the goal of promoting the transfer of know-how and innovation to farm level is another very valuable tool that serves the same objective.

The feed industry is aware of the fact that feed ingredients represent a significant share of the environmental footprint of animal products. In order to encourage feed producers to quantify, report, better understand and reduce the environmental impact, FEFAC has developed, jointly with the American Feed Industry Association (AFIA), feed specific LCA guidelines in 2013. These guidelines were built on existing general guidance from the ENVIFOOD protocol from the EU Food Sustainable Round Table and served as input to the FAO LEAP (Livestock Environmental Assessment and Performance) Feed guidelines, which were published for public review in March 2014. In May 2014, DG ENVI selected FEFAC's submission as regards feed for food producing animals as one of the pilots of the PEF (Product Environmental Footprint), which aims to be an EU harmonised methodology for measuring the environmental impact and performance of a product.



FEFAC also underlines responsible production of the raw material supply according to internationally agreed principles as a very important aspect of sustainability. It is clear that the route of sustainable development of livestock production goes through the feed sector, which could substantially contribute to the Horizon 2020 targets of a resource efficient Europe. However, it should be noted that environmental requirements shouldn't come at the expense

of competitiveness, as that would only have a negative impact on economic sustainability, a key pillar of the sustainability approach. The feed industry also contributes to reducing the accumulation of waste by utilising nutritionally valuable co-products from the food, biofuels and chemical industry. Their use in animal feed reduces effectively the competition for whole grains and other farm crops that are also used for direct food consumption purposes.



Securing the long term feed material supply in Europe

Livestock farms in the EU-28 consume approximately 477 million tonnes of feed annually, of which roughly one third (155 million tonnes) is supplied by compound feed manufacturers (2013 estimate), the rest being forages, grains and other feed materials mixed on the farm. The steady global increase in demand for animal products for the coming decades creates new opportunities for the EU livestock sector. With the abolishment of the milk quotas in 2015, the EU dairy sector is set to become the world's largest exporter of dairy products, which could lead to rising feed demand in the EU. It is the task of policy makers to allow the EU livestock sector to unlock its potential by increasing market share in other segments of the animal product market as well. The projected increase in demand for products from the agricultural sector, including the livestock sector, provides the base for new sector investments and consequently a growth in employment, especially

in rural areas that often offer few alternatives.

The feed industry is a key part of the supply chain for animal production and has proved its resilience during the financial crisis, thanks to its solid approach to risk management. With its buying capacities and its ability to use modern market instruments to manage price volatility, the feed industry plays an effective buffer role in the ever more volatile market place for raw materials, to the benefit of livestock farmers. However, the EU feed industry has to deal with an increasingly complex and often unpredictable legislative environment for the supply of feed materials, which is often further complicated by other geopolitical factors that increase price volatility of key agricultural commodities, turning them into "weather markets".

EU policy makers need to prioritise measures capable of ensuring a level playing field

for EU operators of the feed and livestock chains vis-à-vis their third country competitors, in order to secure the long-term feed material supply to Europe. The EU feed industry already operates under tight market conditions and, with a view to the new round of bilateral free trade agreements, it is of key importance to the EU to maintain open access to safe and sustainable feed materials in order to safeguard the competitiveness of the EU livestock sector. Every year, the EU imports approximately 50 million tonnes of feed materials, mainly in the form of protein-rich feed materials, as a complement to the feed resources available in the EU.

The EU-28 represents approximately 16% of the global compound feed production, ranking third with the US in second place after China. Even though the EU has to operate on the same global market where dynamic emerging markets

are obtaining the preferential buyer status for certain key commodities, societal and political demands have driven the EU to substantially deviate from other continents when it comes to standards on food safety, genetic modification and sustainability. This is clearly connected to differences in the ranking of social priorities. China, for example, who took over the EU's lead position on global soybean meal imports in 2009, is still mainly focussed on food security



Need for the EU to resume the discussion on the Renewable Energy Directive

FEFAC already supported the initial European Commission's proposal to limit the contribution of crop-based biofuels to the targets set for renewable energy production back in 2012. FEFAC also welcomed the position subsequently taken by the European Parliament where the need for enforcing

compliance with the waste hierarchy was heavily stressed. Incentives that frustrated compliance with this hierarchy, causing resources eligible for animal feed to end up in less sustainable outlets such as biofuels production, were to be tackled. Due to the impossibility for the European Council to establish its position,

the legislative process was hampered before the European Parliament could complete its term. FEFAC, therefore, calls on the European Council and the entering European Parliament to resume the discussion on the Renewable Energy Directive and continue the work for a more resource efficient Europe.



for its enormous population, although food safety is taking an increasing social importance. As a result, sustainability criteria do not receive priority for Chinese citizens and authorities, whereas a lot of EU consumers, who consider food security and food safety as a given, regard sustainability as the key issue.

Another example is the continuing worldwide trend to cultivate

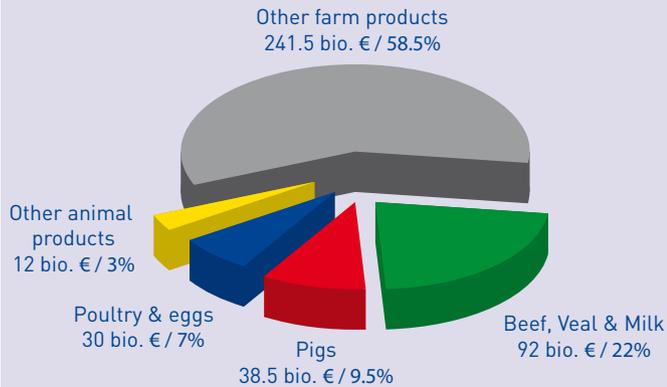
more genetically modified crops, making non-GM crops ever scarcer and thus more expensive. Over 90% of the globally traded soybean meal is derived from soybeans developed with GM technology. FEFAC members see this as a market-driven issue, meaning what matters most is that safety and quality of the feed materials are guaranteed. On customers' request, for example for organic farming or certain

premium animal products, feed manufacturers source feed materials from non-GM crops, but due to the rapid expansion of GM crops globally, non-GM availability is becoming more and more constrained.

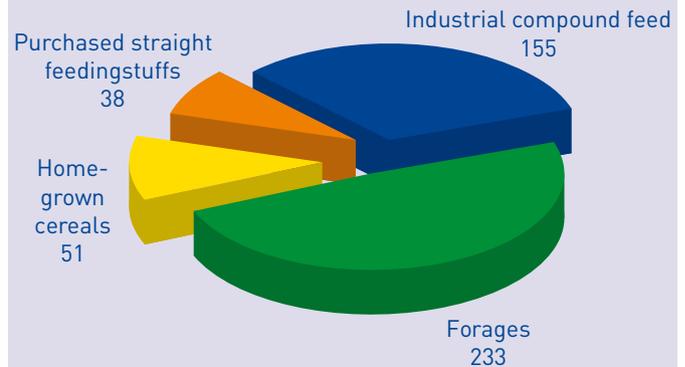
Given the growing market power of emerging markets outside the EU, global feed material suppliers are challenging EU standards as the market dominance is shifting, offering alternative market outlets. With limited agricultural resources worldwide and a continuously increasing global demand, it is high time for EU policy makers to realise that we can no longer afford certain non-scientifically based standards without challenging food security in Europe. FEFAC therefore underlines that it is of great importance that the EU strategic feed material supply is taken into account during the current round of negotiations on free trade agreements.



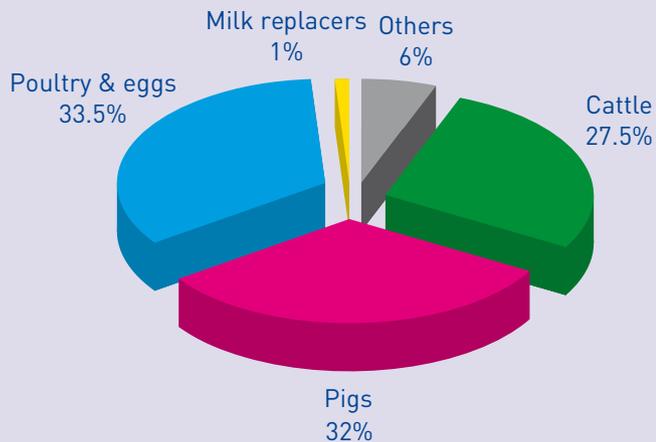
Value of farm production in 2013 in the EU-28 (Source: Eurostat)



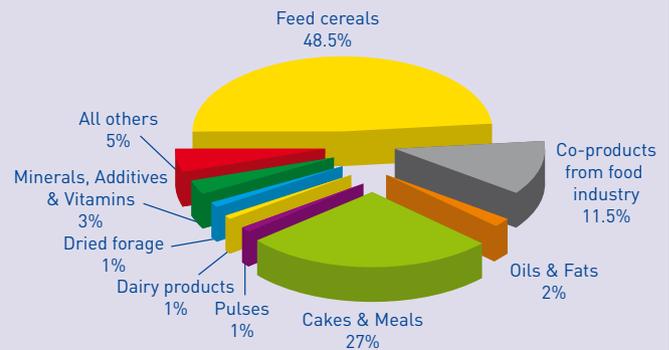
Livestock sourcing in feed in the EU-28 (477 mio. t in 2013) (Source: FEFAC - DG Agriculture)



Industrial compound feed production in EU-28 per category in 2013 (Source: FEFAC)



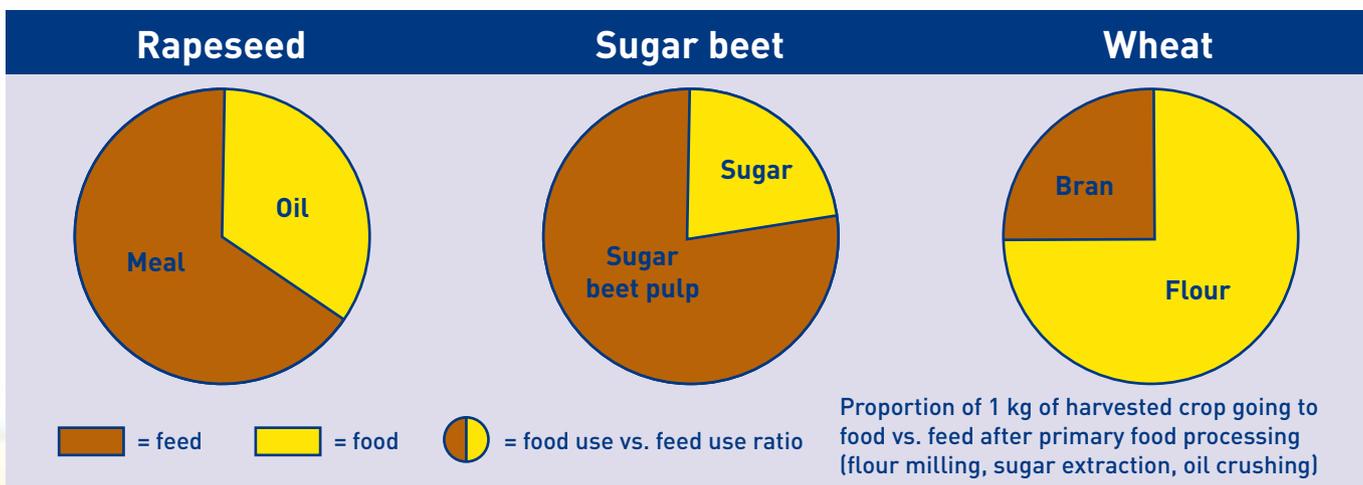
Feed material consumption by the compound feed industry in 2013 in the EU-28 (Source: FEFAC)



Converting losses into feed chain resources



In many food and non-food processing operations of raw materials there is more than one product to be obtained. Usually, the primary processing of a raw material results in co-products, which carry a high nutritional value. For example, brewer's grain results from the processing of malt in the beer industry, sugar beet pulp is the co-product of sugar production from sugar beet, rapeseed meal results from rapeseed oil production and corn gluten feed and distillers dried grains with solubles (DDGS) are

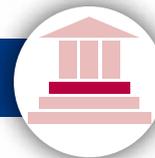


the main co-products of wet-milling of maize grain for starch and bioethanol production. With the right knowledge and skills, these co-products, which are food grade but not used for human

consumption by convenience or lack of market, can be upgraded into high quality animal feed. Each year, the EU feed industry utilises up to approximately 90 million tonnes of several

hundreds of different types of co-products in animal feed. The feed industry thus creates a sustainable outlet for processing industries that are left with a secondary resource. Better said,





without the demand for DDGS and rapeseed meal by the animal feed industry, the bioenergy industry would not be a viable economic sector. The constant challenge for the feed industry is to continue investigating the nutritional value of new co-products that could be utilised as

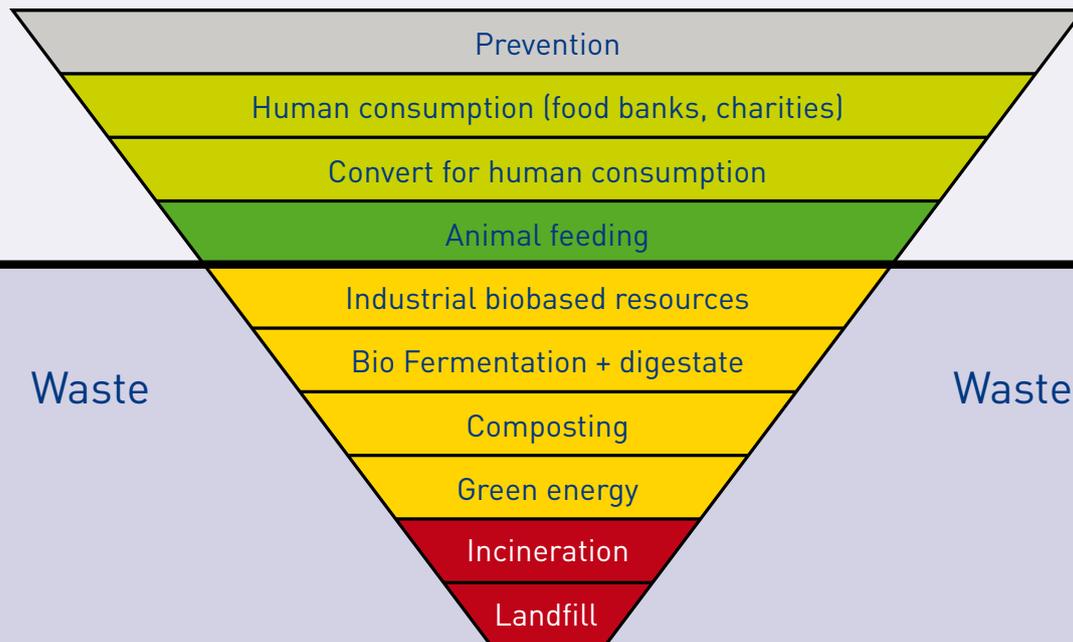
a feed material for farm animal feeding purposes.

The feed industry is thus able, through its expertise in resource efficiency, to play a key role in utilising co-products generated by food chain operators other than primary processing, i.e. the

manufacturing of final food to consumers. In these industries, certain foodstuffs manufactured with the intention to be sold on the human consumption market, may no longer be suitable for direct human consumption and therefore end up as secondary resources of the food industry. Nowadays, broken biscuits, misshaped chocolates, under-flavoured crisps or surplus bread are just a few of the over 3 million tonnes of so-called former foodstuffs that are being utilised in animal feed. Former foodstuffs with a high content of energy, in the form of sugar, oil or starch, are processed by specialized companies who provide compound feed manufacturers with an alternative energy-rich feed material source containing a nutritional profile that is roughly equivalent to grains. Because of the significant nutritional value, co-products utilised in animal feed should never be regarded as waste materials by any means, also because the requirements as regards traceability and safety



Food waste hierarchy (Source: University of Wageningen)



apply just as for any other feed material.

By valorising co-products and by-products from other sectors, the feed industry contributes to the stated EU objective for

the reduction of food waste. As can be seen in the food waste hierarchy, animal feed is the most sustainable outlet for products that are no longer suitable for human consumption. This also applies to native

cereals in case they do not meet the quality standards of human food production, for example due to bad growing or harvest conditions, but remain perfectly suitable for cattle feed.

The way forward for the EU protein supply



The EU is far from self-sufficient in the protein supply for its livestock population and a deficit of 70% is a figure that is often mentioned in public communications by policy-makers and NGOs. However, this figure does not cover the contribution cereals and forages make to the EU protein balance sheet. As maize, wheat and barley generally contain around 10% protein, a rough calculation would show that they provide for approximately 14 million tonnes of protein equivalent annually, i.e. almost as much as the amount of proteins provided by soy imports. This illustrates that a more comprehensive and detailed EU protein balance sheet is needed to measure the potential impacts of CAP reform measures which aim to increase supply of EU produced protein-rich feed materials.

In any case, further initiatives are needed to actively reduce the dependency on imports for strategic reasons. FEFAC supported the inclusion of nitrogen-fixing crops for the Ecological Focus Area's in the

new Common Agricultural Policy, which could be implemented by Member States as an opportunity to stimulate local protein crop production. Feed industry experts have contributed to the focus group "protein crops" of the European Innovation Partnership on Agriculture Productivity and Sustainability, aiming at bringing to the farm level the present knowledge to trigger innovative initiatives in the area of protein crops. Another potential contribution could be made by increasing the availability of non-vegetable sources of protein. The second TSE Road Map proposed a stepwise reauthorisation of non-ruminant processed animal protein in non-ruminant animal feed, thus allowing potential market access to approximately 1 million tonnes of animal proteins. There is ongoing research into the possibilities of farming insects for animal feed purposes, which given their nutritious profile could be a valuable feed material. However, further risk assessments will have to be performed on the potential of insect farming,

including the promising ability to convert non-edible organic material into protein. For the moment, the EU does not allow the use of manure or catering waste for feeding of insects.

A different way of looking on how to reduce the protein deficit is innovating in the current protein use efficiency in animal feed in order to reduce the overall demand. EUFETEC, a research collaboration between industry and academic animal nutrition experts, considers that improving the livestock farmer's knowledge on optimal use of proteins in his feed strategies and systems could help to substantially reduce the actual protein consumption, through the reduction of nutrient losses. Another promising development is "precision feeding", which is all about delivering the appropriate nutrients at the right moment, to the right animals depending on the animal's physiological characteristics, stage of development and production, while taking into account its genetic potential.

Non-tariff trade barriers posed by EU GM regulatory framework

A strategic challenge of the EU protein deficit is the dependency on very few exporters of protein-rich feed materials. The United States, Brazil and Argentina have dominated the world market for soybean meal for quite some time already and unfortunately the EU dependency on South-American countries even increased during the last 10 years. With the rapid development of new GM maize

traits in the US, imports of US corn gluten feed and DDGS have drastically decreased because the risk of an imported shipment containing traces of non-authorized GM crops is too high. A 0.1% technical solution was agreed in 2011 for positively EFSA risk-assessed GM events awaiting authorisation. However, with the increasing global adaptation of GM technology, this risk still poses a serious,

non-tariff trade barrier in agricultural commodities trade. From a strategic food security perspective, there is an urgent need to ensure the predictable implementation of the EU approval procedure of new GM events for imports, while setting a workable low-level presence threshold for adventitious presence of GM events still awaiting formal approval.



The role of fish feed for the sustainable development of EU Aquaculture



Global fish demand is expected to continue increasing substantially in the coming decades. Aquaculture has been the fastest growing animal food producing sector in the world in the last decade, though EU aquaculture has not seen any significant growth, unlike in neighbouring countries like Norway and Turkey. Currently, the EU imports two thirds of its seafood from third countries, with EU Aquaculture only supplying 10% of the EU

market. FEAC, therefore, fully supports the objectives set out in the Common Fisheries Policy reform, in order to enhance the growth and competitiveness of EU aquaculture through sustainable development, in which aquafeed plays a key role. Cooperation between fish farmers and the whole aquaculture supply industries led to the creation of EATIP (European Aquaculture Technology & Innovation Platform) which developed a

Strategic Research and Innovation Agenda for EU policy makers in order to boost the development of the EU aquaculture sector in a level playing field vis-à-vis third country competitors.

On a global scale, aquaculture is at the turning point to become the main supplier of seafood, yet the EU still heavily relies on fisheries. Fish farming provides an efficient way of producing high nutritional value animal products with limited input. The innovations in feed formulations in the last decade have allowed fish farmers to improve the feed conversion rate to such an extent that they can now be considered net protein producers, without compromising fish health and welfare. The fish farms and fish feed production sites are mostly located in remote rural and coastal areas with few other job opportunities, thereby making aquaculture an important factor in supporting local economic growth and providing alternative job opportunities.



Alternatives to fish meal and fish oil

The greatest challenge to be tackled by sustainable aquafeed production is the reduction of the use of fish meal and oil derived from wild-caught fish. Though both are considered highly valuable feed materials, the wild fish resources needed for their production are stagnant or even decreasing. The EU aquaculture sector constantly investigates the possibilities to source safe, sustainable alternative feed materials which could decrease the

dependency. As shown at a workshop organised in April 2014 by FEFAC, krill, algae and insects are alternatives that all have certain potential, but each has its own challenge and a lot of progress is still needed to safeguard consistent supply in large quantities. In June 2013, the EU reauthorised non-ruminant PAP (processed animal protein) for fish feed purposes as a first step of the TSE roadmap towards partially lifting the feed ban on animal proteins. The highly digestible

and protein-rich PAP is widely used in fish feed in third countries exporting farmed fish to the EU as it perfectly meets the nutritional requirements of carnivorous fish species such as salmon, trout and sea bass and above all does not take up any additional land. However, despite its excellent nutritional profile and guarantees as regards safety, non-ruminant PAP is still not widely used within the EU due to market resistance.





Praesidium Members



Secretariat



Committee Chairpersons





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;



encourage the development of precompetitive European feed-related Research & Development projects

seeking to enhance the EU feed & livestock sectors competitiveness and capacity to innovate in and/or transfer science and technology based solutions to improve the sustainability of resource efficient livestock production systems.



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Rue de la Loi, 223 Bte 3 - 1040 Bruxelles

www.fefac.eu