<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Foreword</td>
</tr>
<tr>
<td>4-7</td>
<td>FEFAC 2030 Animal Feed Industry Vision</td>
</tr>
<tr>
<td>8</td>
<td>Animal Nutrition Committee</td>
</tr>
<tr>
<td>9</td>
<td>Premix &amp; Mineral Feed Committee</td>
</tr>
<tr>
<td>10</td>
<td>Industrial Compound Feed Production Committee</td>
</tr>
<tr>
<td>11 - 14</td>
<td>Statistics</td>
</tr>
<tr>
<td>15</td>
<td>Feed Safety Management Committee</td>
</tr>
<tr>
<td>16</td>
<td>Sustainability Committee</td>
</tr>
<tr>
<td>17</td>
<td>Fish Feed Committee</td>
</tr>
<tr>
<td>18</td>
<td>Milk Replacers Committee</td>
</tr>
<tr>
<td>19</td>
<td>FEFAC Mission / Communication</td>
</tr>
<tr>
<td>20 - 21</td>
<td>FEFAC Network</td>
</tr>
<tr>
<td>22</td>
<td>Organisation Chart, Praesidium Members and Secretariat</td>
</tr>
<tr>
<td>23</td>
<td>National Associations joining FEFAC</td>
</tr>
</tbody>
</table>

**Disclaimer**

© 2016 – 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.
A VERY CHALLENGING YEAR FOR EU LIVESTOCK FARMERS

Thank you for taking a look at the FEFAC Public Annual Report 2015/2016. I hope it will provide you with a clear overview of FEFAC’s activities and priorities over the past year. I express my gratitude to all people involved in FEFAC as well as our chain partners in Europe and the rest of the world to make EU policies workable for the approximately 4,000 European compound feed manufacturers.

It has been an extraordinarily challenging year for our customers. It is no secret that the economic squeeze is also felt by the feed industry, being the main supplier. Prices of pig meat suffered because of oversupply caused by the continued Russian political embargo, while dairy farmers were faced with an additional economic dimension due to the lifting of the milk quotas. FEFAC expresses its solidarity to all livestock farmers who are being pushed to the edge in this crisis. On numerous occasions we have called on the European Commission to take up its responsibility to remove non-tariff trade barriers that jeopardize access to competitively-priced feed supplies. It should be a political priority to alleviate pressure on the already troubled livestock farmers. Unfortunately, we have witnessed political uncertainties challenge the very foundation of the internal market.

Despite the European Parliament rejection, the Commission has kept the “opt-out” proposal for EU approved GMO food and feed events on the table, meaning disruption of the common market is still a potential outcome. FEFAC, COCERAL & FEDIOL estimated that a political conclusion on the file could lead to a 10% increase in feed costs for EU livestock farmers in opt-out countries where GMO soy would need to be replaced with non-GMO soy. We have repeatedly stated that there is no need for this proposal as the feed industry already provides solutions to fulfil the demand for non-GMO feed through segregated supply chains. Next to that, the Commission continued to delay decisions on GMO food & feed import approvals, even though the EU Ombudsman in January 2016 judged that the Commission has been committing unjustified maladministration by not complying with the legal timescale requirements.

It is of crucial importance that the EU feed & livestock sector remains competitive and continues to have access to global feed supplies to maintain market predictability as the basis for our livestock farmers so they can capture their fair share in very dynamic global markets for animal products. FEFAC members will continue to fulfil their main mission as a reliable, knowledge-driven partner to the livestock industry, for example by providing solutions to societal issues such as climate change and antimicrobial resistance. On the following pages you can read how we intend to unfold the FEFAC 2030 Vision of the EU feed industry to ensure a profitable future for the EU livestock sector based on targeted innovation in feed safety management, animal nutrition and sustainability.

Ruud Tijssens, President
Livestock farmers are unique entrepreneurs with a crucial role in maintaining agriculture sustainable while meeting societal requests. Animal food products are enjoyed all over the world, but the production phase is often subject to critical scrutiny. The demands from the downstream food chain partners and political decision-makers pose challenging objectives for animal husbandry and its main partner, the feed industry. The FEFAC 2030 Animal Feed Industry Vision outlines our solutions for the livestock farmer who seeks to deliver the animal food chain solutions for a safe, competitive and sustainable future.

The story of the feed industry is rooted in animal nutrition science. It forms the heart of the FEFAC 2030 Animal Feed Industry Vision. Feed is formulated depending on the nutritional requirement of the different types of animal species, the stage of development and the genetic potential. Knowledge in animal nutrition allows feed manufacturers to help livestock farmers to keep their animals healthy and get the best out of them in terms of animal product quality and safety. It is also thanks to this knowledge that there is high value feed use of co-products that result from industrial processes such as oilseed crushing, wheat milling, sugar extraction and beer production. The 90 million tonnes of co-products the EU feed industry uses each year reduce food wastage as well as the need for land-requiring feed materials.

The drivers that shape the way livestock farming, including aquaculture, is expected to perform are challenging, but they also provide opportunities for innovation. The spread of antimicrobial resistance is one of the greatest challenges to human health in modern history. Through improved animal nutrition strategies that maintain animal gut health and foster resistance to diseases, the feed industry can play a crucial role in prevention strategies of livestock farmers who seek to reduce the need for medication at farm level. This is in the interest of the whole animal food chain and requires a shared responsibility and investment. Climate change is another tremendous challenge, especially taking into account the pressure on available feed resources and further globalisation trade in animal products. The feed industry has the capacities to make livestock farming more resource efficient, thereby reducing the GHG emissions and other environmental impacts from the animal food chain. The feed conversion rates for all farm animals, including fish, have steadily decreased over the years, meaning less feed is needed for the same animal performance. The use of phytase or protease as well as the use of amino acids to balance diets have allowed to reduce the release of nitrogen and phosphorous into the environment via manure. Innovation in animal nutrition science keeps
The FEFAC 2030 Animal Feed Industry Vision

progressing, which also allows for a comprehensive understanding of the interaction of (micro-)feed ingredients and anti-nutritional factors as well as the incorporation of less conventional feed ingredients. The perfect example here is the feed conversion of former foodstuffs such as broken biscuits, incorrectly flavoured crisps or surplus bread, illustrating our role in the food chain circular economy. The value of animal nutrition is also visible at consumer level, as the specific nutritional composition of animal food products, such as omega 3 content or fatty acid profiles, is directly related to the feed intake.

The license to operate for the feed industry is feed safety; there can be no compromise. In this aspect, the feed industry delivers a valuable service to livestock farmers by safely and professionally handling substances with a higher risk profile and adequately performing indepth safety assessments. Feed safety is a task of permanent stature, subject to frequently renewed scientific risk assessments. The feed industry is fully committed to staying ahead of the game and prevent feed contaminations from spreading through the food chain.

We lead discussions to continuously move forward on feed safety, particularly on feed safety management capacity building, optimised risk management along the chain and increased cooperation between control authorities and feed operators. FEFAC compiles the encouraging practical examples of cooperation between the private and public sector in the domain of feed safety management in an effort to encourage the exchange of data and information on existing and emerging risks across all EU Member States.

The future of livestock farming can only be sustainable when dealing with the challenge of climate change. It is fair to argue that animal feed to a large extent determines the environmental performance of animal products, but it also means that this is the stage where the biggest gains can be made! An important development that the feed industry is contributing to is the creation of a harmonised methodology for the correct measuring of the environmental footprint of feed production, which is essential to calculating the environmental footprint.
The FEFAC 2030 Animal Feed Industry Vision

Feed production can have an even closer connection to the quality of the finished animal product than it has ever had before.

The feed industry can deliver competitive, safe and sustainable feed solutions meeting the diverse farmers demands and livestock management systems in the form of a full diet (complete feed), part of the diet (complementary feed) or for specific nutritional objectives (dietetic feed). Feed manufacturers also offer financial risk management strategies to buffer for volatility on the commodity market. State of the art feed processing technology delivers optimal feed homogeneity, palatability and enhanced digestibility. Thanks to advanced IT developments, we have already seen the start of 'smart' feed manufacturing, incorporating parameters on safety, sustainability and nutritional value during production and allowing for customised precision feeding techniques. Feed production can thus become a more integrated part of the animal food chain with an even closer connection to the quality of the finished animal product than it has ever had before.

With 158 million tonnes of the total 480 million tonnes of feedstuffs consumed by farm animals in the EU each year, an estimated turnover of 50 billion € and approximately 110,000 jobs, the EU feed industry is an agricultural juggernaut with many capabilities. The feed industry has the tools to let European livestock farming take on the challenge of increasing global demand in animal products, but it will require partnerships with other food chain stakeholders and investment from public authorities in animal nutrition research to make the FEFAC 2030 Animal Feed Industry Vision happen. FEFAC is open to engage in dialogue with all food chain partners for a secured future of the animal food chain.

The FEFAC 2030 Animal Feed Industry Vision is built on three pillar visions which have a focus on respectively feed safety, animal nutrition and sustainability.

On the next page a summary is given of what animal food chain solutions the feed industry delivers, the full documents are available on FEFAC’s website.
FEED SAFETY: SHARING RESPONSIBILITY FOR FEED SAFETY ALONG THE CHAIN

Capacity building
- Increase Feed Safety Risk management in EU feed sector
- Codes of practice and HACCP guides (EFMC)
- Assistance to feed safety incidents management
- Dissemination of best feed safety management tools (e.g. co-ordinated monitoring for contaminants)

Optimise Risk Management along the Feed Chain
- ’Top-of-the-pyramid’ approach
- Assess supplier guides to good hygiene practices
- Encourage interaction between feed safety assurance scheme owners

Stimulate Co-operation between Authorities & Industry Operators
- Increase efficiency and cost-effectiveness
- Increase feed safety incident response time
- Build on FEFAC inventory of best practices

ANIMAL NUTRITION: A MULTIFUNCTIONAL SCIENCE, DELIVERING SOLUTIONS TO A SUSTAINABLE LIVESTOCK SECTOR

Resource Efficiency
- New and/or improved feed evaluation models
- Nutrient-based nutrition and response models
- Reduction of nutrient loss and emissions

Enhance Animal Health
- Understanding of interactions between nutrients, gut health and disease resistance
- Adapting feed processing to favour the development of immunity

Socially Responsible Livestock Production
- Impact of feed composition on quality and nutritional value of food (omega 3, selenium, iodine, etc.)
- Improve farm animal social behaviour and longevity of production

SUSTAINABILITY: A RESPONSIBLE AND RESOURCE-EFFICIENT FEED INDUSTRY

Environmental Footprinting
- Methodology development through Product Environmental Footprint (PEF) project
- LCA database on feed ingredients with Global Feed LCA Institute (GFLI)

Responsible Sourcing
- Soy Sourcing Guidelines to realise a mainstream market transition for responsible soy
- Stimulate responsible sourcing of other feed ingredients

Resource Efficiency
- Develop common metrics to calculate a broader range of resource efficiency indicators
- Take into account local market drivers and environmental conditions
As part of its mandate, the Animal Nutrition Committee assessed EU legislative initiatives and provided input and expertise on a number of feed-related topics. The legislative process of the recasting of the over 25 year old legislation on medicated feed came to a halt around March 2016 due to the complicated discussions on the proposal for Veterinary Medicinal Products, to which it is linked. The Animal Nutrition Committee welcomed in general the report of the AGRI Committee of the European Parliament, and stressed that producing medicated feed is a service delivered to farmers by compound feed manufacturers whose main activity remains the production of standard, non-medicated feed.

In the light of the Fitness Check of the General Food Law, the Committee reminded the EU Commission that some actions regarding imports from third countries have not been completed yet and that an in-depth evaluation of the effectiveness of the feed hygiene legislation would be suitable, for example as regards clarification of the feed chain’s boundaries. The Committee paid particular attention to the setting of control fees as part of the revision of the EU legislation on Official Feed & Food Controls.

In October 2015, FEFAC and its Italian member association ASSALZOO organised a workshop on Alternative Protein Sources, in the margins of EXPO Milano 2015. The participants discussed the safety and sustainability of alternative protein sources such as insects, seaweed, algae, marine worms and single cell proteins. The experts considered that, for the foreseeable future, the EU feed industry will still have to predominantly rely on soy imports from the Americas, despite the promising potential of alternatives.

The Animal Nutrition Committee delivered a lot of work on the updated version of the Catalogue of Feed Materials and the draft FEFAC / Copa-Cogeca EU code to good labelling practices, which are expected to be published in the Official Journal of the European Union before the end of 2016.

After more than 15 years of intensive legislative activity in the feed sector at EU level, the Animal Nutrition Committee considered FEFAC should dedicate more resources to the solutions animal nutrition science can provide to the EU livestock sector’s main challenges and key societal concerns. At the FEFAC-FEFANA Conference on “Innovation in Animal Nutrition” on 9 June 2016 in Brussels, animal nutrition science was promoted as the backbone of the EU feed industry. In a keynote speech, European Commissioner for Health & Food Safety Vytenis Andriukaitis identified innovation in animal nutrition as a vital element in fostering animal health and an important step forward on fighting antimicrobial resistance.
Micro-ingredients and in particular feed additives play an essential role when it comes to illustrate animal nutrition science’s contribution to meeting the livestock sector’s economic, societal and environmental challenges. This was a cornerstone of the first joint FEFAC-FEFANA public conference on “Innovation in Animal Nutrition” held in June 2016 in Brussels, which attracted over 170 participants. FEFAC supported FEFANA’s clear message that the strong market demand for new, innovative feed additive products is being hampered by a cumbersome and very costly regulatory approval system. FEFAC and FEFANA hope that the European Commission will stick to its commitment to invest more in stakeholder dialogue to streamline the delivery of innovation in animal nutrition.

The primary objective of the Premix & Mineral Feed Committee remains to secure the ability to safely use the essential feed additives, either already authorised or undergoing reauthorisation, including labelling requirements. The experts continued to argue against the trend to reduce the maximum limits of nutritional feed additives, which does not always take into account the variability of requirements and the practical conditions of compound feed manufacturing as well as livestock feeding practices. It should not be forgotten that a shortage in essential nutrients puts animal performance and even animal welfare and health at risk.

The Committee experts reiterated their request for a simplification of the guidelines for feed additives, which aim to stimulate clarification for operators, consistency for risk managers and practicality for users, while reducing costs and promoting innovation. Particularly the proposal to simplify the definition of animal categories in order to widen the scope of authorisations was welcomed by the Premix & Mineral Feed Committee. The Premix & Mineral Feed Committee holds the view that EFSA should launch the process of adapting its guidance once the EU decision makers have finalized the revision of the EU guidelines and not the contrary. To improve the quality of EFSA opinions, the Committee also continued its interactions through the EU association platform Pari-EFSA, which aims to foster an effective dialogue between industry operators and EFSA risk assessors.

European Commissioner for Health & Food Safety Vytenis Andriukaitis at the FEFAC-FEFANA “Innovation in Animal Nutrition” conference © Yanne Boloh

Reinder Sijtsma, Committee Chair
The persisting livestock market crisis was a major concern for the experts in the Industrial Compound Feed Production Committee. FEFAC’s market experts took note of crisis management measures implemented by the European Commission, but noted the need to consider more long-term measures to enhance the competitiveness of the EU livestock sector, such as undisturbed market access to feed materials on global markets.

They also stressed the feed industry’s capacity to partially compensate in the short-term the negative effect of the Russian import embargos (both sanitary and trade bans), thanks to generally lower cost of feed materials. While the compound feed sector has the ability to buffer price volatility for raw materials, the experts noted that livestock farmers and processors still do not make use of hedging tools to lock in prices for livestock products in order to limit the financial risks of price shocks.

The Committee experts have, therefore, continuously argued for more access to operational financial instruments under the new MiFID rules (Market in Financial Instruments Directive) to be able to continue to offer this additional service to livestock farmers. Feed manufacturers are not financial operators, but they do rely on the use of financial risk management tools to protect themselves and their customers from market volatility. In the discussions on MiFID implementation, our specific type of commercial operations on future markets for agricultural products should be taken into account.

The Committee experts are involved in a joint EU feed chain initiative with Copa-Cogeca, FEDIOL and COCERAL to establish a meaningful and objective EU protein balance sheet. FEFAC experts welcome all concerted efforts at EU level to increase availability of European protein sources but also stress that the current EU dependence on competitive vegetable protein imports is here to stay for the foreseeable future and access should not be restricted. The compound feed industry, therefore, needs to be able to count on predictable Commission approval of new EFSA risk assessed GMO events to prevent any disruption of trade flows while maintaining legal certainty for EU operators.
FEEDING EU LIVESTOCK

Meat and other animal products in the EU-28 represented app. 162 bio. € in 2015, i.e. 39% of the total value of farm production. Animal feed is the most important livestock production cost factor and represented in 2015 up to 85% of the farm gate value of poultry. The EU-28 farm animals are fed with app. 480 mio. t of feedstuffs, thereof app. half are roughages produced on-farm, 10% are grains produced on-farm, 10% are purchased feed materials and 30% are industrial compound feed.
The compound feed production in the EU-28 slightly increased by 1% in 2015 to 158 mio. t. Poultry and pig feed have seen their production grow by resp. 2.5% and 0.6%, whereas cattle feed fell by 0.7%. Poultry feed confirms its position as leading compound feed segment slightly above pig feed.

The good availability of forages due to favourable weather conditions and the sharp drop in dairy prices significantly affected the demand for compound feed for dairy cows, which did not benefit at all from the 2% increase in milk deliveries in 2015. Likewise, the feed industry could not take full benefit of the increase in pig production, whereas poultry feed production continued to grow, boosted by an increase in poultry meat consumption per capita (+4%).

Only Poland and Spain have seen their production significantly increase by almost 4%, whereas Germany experienced opposite results.

Germany and Spain are now shoulder to shoulder as leading EU countries in terms of total compound feed, ahead of France.

Germany is the leading cattle and pig feed producer while France maintains its leading position as poultry feed producer. The compound feed production in the EU represents 16% of the global production that is estimated at around 989 mio. t.
Despite the huge variations in feed material prices over the last years, the proportion of feed materials per categories remained relatively stable (48% for cereals, 28% for oilseed meals). However, this does not reflect significant changes for some feed materials e.g. for corn gluten feed or dried distillers grains usually imported from the USA which have almost disappeared since 2007 due to repeated trade disruptions because of asynchronised authorisations of GM crops. Since the Mac Sharry reform in 1991, the average inclusion rate of cereals increased from 32 to 48%. On the other hand, tapioca, one of the most important substitutes to cereals in the 80s, completely disappeared from the diets. Animal proteins, which in the past represented up to 2% of feed materials, were banned in 2001 and mostly replaced by soybean meal. The EU livestock is by far the most important outlet for EU produced cereals with 60% of the internal usage. The share of rapeseed meal significantly increased with the development of the biodiesel sector. The EU remains dependent at 69% for its supply in vegetable proteins.
The production of meat in the EU-28 increased for the fourth year in a row with +3% in 2014 vs 2015. All meats benefited equally from this recovery with growth for beef, pig and poultry between 3 and 3.5%. The meat consumption in the EU-28 is estimated around 91 kg/capita/year, i.e. 2 kg/capita/year more than in 2014, confirming the reversion observed already in 2014 of a downward trend that started in the mid-2000s. Poultry meat is the second most consumed meat in the EU-28 with 26 kg/capita/year in 2015, far behind pig meat (42 kg/capita/year). The EU is self-sufficient in livestock products in volumes, in particular pork and dairy products.
The Feed Safety Management Committee welcomed the interest from the DG SANTE Directorate on Health & Food Audits and Analysis (formerly known as FVO) in the optimisation of interaction between competent control authorities and private sector own-control systems. The promotion of such interaction between industry and authorities is one of the pillars of the FEFAC vision on Feed Safety Management. The Directorate on Health & Food Audits and Analysis encountered positive audit experiences in the UK, France and Belgium, which should come to the benefit of other EU Member States. Particularly monitoring programmes proved to be a critical information source that could enhance the efficiency of the working programme for official controls through an improvement of the risk assessment approach.

FEFAC President Ruud Tijssens was able to personally present this vision on Feed Safety Management to European Commissioner for Health & Food Safety Vytenis Andriukaitis during a field visit in Belgium in September 2015. It was clear that FEFAC shares the same objective as the Commissioner, which is safeguarding the safety and integrity of the feed chain. The field visit provided an occasion to present the EU feed industry’s new mindset when it comes to feed safety, which is moving from “lessons to be learned” to “showcasing best practices” in order to facilitate the “top-of the pyramid” approach.

The willingness of authorities as well as chain partners to invest and cooperate with private own-control systems will, however, depend on the ability to evaluate the performance of the private assurance systems. This is a key mission for the Feed Safety Management Committee, who is working on a benchmarking approach to increase visibility, transparency and comparability between the schemes.

The main FEFAC mission in feed safety remains the support to members own action plans at national level. One key initiative is the monitoring of feed safety incidents by the FEFAC Feed Safety Incident Management Team, which in 2015 coordinated the feed chain response to incidents such as the contamination of co-products from the fermentation industry by Bacillus Cereus that led to high pig mortality. The detection of ruminant DNA in fish feed is a persisting non-compliance issue in RASFF notifications, although for the main part linked to unharmonised interpretation of the official PCR testing method results. Due to its increasing importance, the Committee intends to make harmonisation in the area of Salmonella risk management more of priority in the coming years, as well as the management of pesticide residues in imported co-products from cereals and oilseed processing.

European Commissioner for Health & Food Safety Vytenis Andriukaitis at field visit in Belgium in September 2015

Sara Galletti, Committee Chair
Important milestones on FEFAC’s sustainability agenda were delivered in the past year thanks to the Sustainability Committee. In August 2015, FEFAC published its Soy Sourcing Guidelines and less than a year later already 12 responsible soy programmes successfully passed the independent benchmarking by the International Trade Center (ITC). In a conservative estimate, FEFAC sustainability experts believe that European feed companies used over 5 million tonnes of responsible soy in compliance with FEFAC’s Soy Sourcing Guidelines in 2015, representing an important step towards a mainstream market. In the second version of their soy sourcing guidelines published in May 2016, the Consumer Goods Forum (CGF) recommended to use the soy programmes that are positively benchmarked by ITC to ensure that the purchased soy does not come from illegally deforested land. In addition, they recognise FEFAC’s work as a stepping stone for retailers and food businesses who have taken commitments towards zero-net deforestation. The Sustainability Committee also invested a lot of time and resources in environmental footprinting of feed production. The public consultation for the final draft Category Rules for the EU-coordinated Product Environmental Footprint (PEF) were launched in summer 2016. The updated version would be assessed and approved by the EF Steering Committee in 2017. The methodology strongly draws on previous work FEFAC and IFIF have done with the FAO, national governments, NGOs and other livestock chain partners on the Livestock Environmental Assessment & Performance Partnership (LEAP). In January 2016, FEFAC, IFIF, AFIA (US feed industry) & ANAC (Canadian feed industry) launched the Global Feed LCA Institute which aims to provide a freely accessible, transparent LCA database for feed ingredients, which can be linked to the PEF project as public access database. Correct measurement of the footprint of feed production is a prerequisite when it comes to calculating the environmental performance of animal products.

This year, FEFAC also expressed its support for the Commission’s proposal in the Circular Economy Package to exclude feed materials placed on the market according to Regulation (EC) No 767/2009 from the Waste Framework Directive 2008/98/EC, which is expected to encourage and optimise the use of former foodstuffs in feed in order to reduce supply chain food waste.
FEFAC is one of 15 founding members who prepared the formal launch of the new EU Advisory Aquaculture Council (AAC) scheduled for summer 2016. The AAC will provide advice to the European Commission on all aquaculture-related matters laid down in the dedicated chapter on Aquaculture in the new Common Fisheries Policy, which provides the new policy framework in support of the sustainable development of EU Aquaculture. The Fish Feed Committee agreed to the AAC’s long-term working programme, which includes policy measures linked to the production and sourcing of safe and sustainable fish feed ingredients.

Since the lifting of the ban on non-ruminant processed animal protein (PAP) in summer 2013, the Fish Feed Committee has seen numerous RASFF notifications on the detection of ruminant DNA in fish feed. FEFAC’s fish feed experts actively engaged with EFPRA & EAPA (European Renderers and Blood Products Associations) and EU authorities [including European Reference Laboratory on Animal Proteins, EURL AP and National Reference Labs] to develop a technical solution for the analytical problems that relate to the interpretation of results when using the official ruminant PCR testing method. The current uneven implementation of the new control method could lead to a de-facto ban of the use of completely safe non-ruminant PAP in fish feed in certain countries, which would be a real loss in terms of nutritional value and sustainability considerations.

The use of alternative protein sources to replace fish meal from wild catch is a key area of investigation for the Fish Feed Committee, who actively participated in the workshop on Alternative Protein Sources organised by FEFAC in Piacenza. This confirmed the sector’s huge interest in certain protein sources such as fish trimmings and insects. The incorporation of insects in fish feed however still faces regulatory restrictions and the feed safety questions highlighted in the initial generic risk assessment on feed and food use of insects delivered by EFSA in October 2015 still need to be answered.

The Fish Feed Committee experts contributed to the development of the environmental footprint methodology in the Fish Pilot of the Product Environment Footprint (PEF), which will support the view that aquaculture products have the most efficient profile when it comes to producing animal protein. FEFAC presented the importance of the PEF at the FEAP (Federation of European Aquaculture Producers) event "Aquaculture in Motion" in December 2015.

Niels Alsted, Committee Chair
The members of the Milk Replacers Committee closely monitored the dairy feed materials market. The price of dairy protein remains the most important factor for veal production, despite the fact that milk replacer formulations incorporate much less feed materials of dairy origin, such as skimmed milk powder, than 10 years ago (50% vs 70%). In the context of the severe crisis faced by the dairy sector in the EU, the Committee expressed concerns as regards the resilience of dairy farming in the EU as the main supplier of both feed ingredients and young calves.

The promotion of veal calves consumption in the EU could, therefore, help the EU dairy sector. The Committee experts dedicated time to fostering coordination and information sharing among national veal calves associations with a view to launch promotion campaigns to stimulate veal consumption. They also monitored the orientation taken by national authorities as regards the reintroduction of some form of coupled payments in the veal sector.

The Milk Replacers Committee sees potential in the stepwise reopening of the US market for beef and veal produced in the EU, which may provide a new export market. EU veal production could be competitive due to lower production costs and there is still potential for growth in the US veal consumption. Other areas of interest and expertise of the Committee concern the welfare of veal calves as well as the impact of disease outbreaks on markets and biosecurity measures.
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.

Communication

In the past year, FEFAC launched several new communication initiatives. Since September 2015, FEFAC started the online blog “The Feed Chain in Action”. This has allowed FEFAC to publicly report in greater detail on the development of its activities. Since February 2016, FEFAC also launched the NewsFEED, a public e-newsletter gathering all recent news relevant to FEFAC activities. FEFAC continued its activity on its Twitter account, which as of summer 2016 has about 700 followers.
As a European association, it is crucial for FEFAC to maintain contacts with European Institutions who contribute to shaping EU legislative proposals, primarily the European Commission. FEFAC experts take part in the DG SANTE Advisory Group on the Food Chain, Animal and Plant Health and the Animal Health Advisory Committee, as well as in the DG AGRI Civil Dialogue Groups on the CAP, International aspects of Agriculture, Animal Products, Arable Crops, Milk and Organic Farming. FEFAC actively takes part in the EFSA Stakeholders Platform, where its 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.

FEFAC has for long granted priority to collaboration with other stakeholders of the feed and food chain to tackle feed and food chain issues of common interest. FEFAC participated in the establishment and/or is member of the following entities.

**Agri-Food Chain Coalition (AFCC)**, comprises eleven EU associations from agricultural input industries such as suppliers of machinery (CEMA), seeds (ESA), fertilizers (Fertilizers Europe), crop protection (ECPA), animal health (IFAH-Europe), animal feed (FEFAC) and biotechnology-based products (EuropaBio), the agricultural trade (COCERAL and CELCAA), EU farmers (Copa-Cogeca) and European food and drink manufacturing sector (FoodDrinkEurope). Together, these industries account for more than 30 million jobs and some 3.5% of the EU’s gross value added.

The **Aquaculture Advisory Council (AAC)** provides advice to the European Commission on all aquaculture-related matters laid down in the dedicated chapter on Aquaculture in the new Common Fisheries Policy. FEFAC is one of 15 founding members, together with i.a. FEAP, Copa-Cogeca, EMPA and the NGO Seas At Risk, who prepared the formal launch in summer 2016.

**Animal Task Force**, a knowledge based cooperation between representatives from industry and the academic world focused on enhancing innovation and sustainability in the animal production sector of Europe’s food supply chains. The integrated approach allows for the setting of the agenda for research and innovation in the animal domain and assures a valuable contribution to the societal and environmental challenges. FEFAC holds membership to the Animal Task Force through **EUFETEC**, a European feed technology research platform composed of several feed-related bodies representing the feed industry and research institutes.

**Food Safety Platform**, grouping key European stakeholder federations concerned with feed & food safety (including the European Consumers Association BEUC), aiming at improving communication between the feed & food chain partners on emerging feed and food safety issues and related topics. In April 2015, the Food Safety Platform held an event called “Safe food for European consumers” in the light of the WHO World Health Day.

**EPRUMA** (European Platform for the Responsible Use of Medicines in Animals), established in 2005 and composed of various EU organisations of the livestock and pet sectors, with the mission of promoting the responsible use of...
medicines in animals in the EU. EPRUMA issued in 2008 “Best-practice framework for the use of antimicrobials in food-producing animals” that was updated in 2015.

**EFAC Network**

**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’s Fish Feed Committee. EATiP developed a vision document on the research needs of the Aquaculture sector until 2020 including a strategic research and innovation agenda containing key projects which could facilitate the development of a more sustainable and competitive EU Aquaculture sector in line with CFP reform policy objective for Aquaculture.

**Food SCP Roundtable** (EU Food Chain Roundtable 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 Roundtable is co-chaired by the European Commission.

**EU FCTF** (EU Feed Chain Task Force on the Catalogue of Feed Materials), a gathering of 41 EU organizations of the different sectors of the feed chain (feed material producers, traders, compound feed manufacturers and farmers) whose mission is to maintain and upgrade the EU Catalogue of Feed Materials. FEFAC holds the role of coordinator of the EU FCTF.

FEFAC is a member of **IFIF**, the International Feed Industry Federation, which was founded in 1987 by FEFAC and AFIA, the American Feed Industry Association. IFIF accounts for over 80% of the approximately 1 bio. t of total global feed production. Together with FAO, IFIF annually organises International Feed Regulator Meetings since 2008 to jointly deal with emerging feed safety issues and foster convergence of feed legislation at global level. FEFAC and IFIF actively contribute to the **CODEX Alimentarius** Task Force on Animal Feeding, which has developed guidelines and standards on Good Animal Feeding Practices with the aim of ensuring the safety and quality of foods of animal origin.
Organisation Chart, Praesidium Members and Secretariat

Organisation Chart

Praesidium

Council

Directors’ General College

Ad hoc Working Groups & Issue Teams

Secretariat

Specialised Committees
• Milk Replacers
• Premix & Mineral Feed
• Fish Feed

Horizontal Committees
• Animal Nutrition
• Industrial Compound Feed Production
• Feed Safety Management
• Sustainability

Praesidium Members

TUSSSENS Ruud
President
ASSALZO (Italy)

ALLODI Alberto
President
ASSALZO (Italy)

BELLI Tony
AIC (United Kingdom)

BOUSSIT Jean-Michel
EUROFAC (France)

DE SOUSA Cristina
AIC
(Portugal)

EINBERGER Anton
BVT (Germany)

OBIDZINSKI Witold
IZP (Poland)

PAGHN Jesper
DAKOFO (Denmark)

Secretariat

DÖRING Alexander
Secretary General

BOUXIN Arnaud
Deputy Secretary General

MARTIN Nicolas
Policy Advisor

VAN DEN BRINK Anton
Public Relation Advisor

LIBER Françoise
Executive Secretary

CHAO Susana
Administrative Secretary

PETERS Anne
Translator & Webmaster

DEIANA Roseline
Receptionist & Documentation
## National Associations joining FEFAC

### Active Members

<table>
<thead>
<tr>
<th>Association</th>
<th>Country</th>
<th>Year (First Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFÖ</td>
<td>Austria</td>
<td>1995 (1964)</td>
</tr>
<tr>
<td>APFACA/BEMEFA</td>
<td>Belgium</td>
<td>1959</td>
</tr>
<tr>
<td>BFMA</td>
<td>Bulgaria</td>
<td>2013</td>
</tr>
<tr>
<td>CFIA</td>
<td>Croatia</td>
<td>2013 (2008)</td>
</tr>
<tr>
<td>CAFM</td>
<td>Cyprus</td>
<td>2004 (2003)</td>
</tr>
<tr>
<td>SKK</td>
<td>Czech Republic</td>
<td>2004 (2000)</td>
</tr>
<tr>
<td>DAKOFO</td>
<td>Denmark</td>
<td>1973</td>
</tr>
<tr>
<td>FFDIF</td>
<td>Finland</td>
<td>1995 (1993)</td>
</tr>
<tr>
<td>EUROFAC*</td>
<td>France</td>
<td>1959</td>
</tr>
<tr>
<td>DVT</td>
<td>Germany</td>
<td>1959</td>
</tr>
<tr>
<td>HGFA</td>
<td>Hungary</td>
<td>2012</td>
</tr>
<tr>
<td>IGFA</td>
<td>Ireland</td>
<td>1973</td>
</tr>
<tr>
<td>ASSALZOO</td>
<td>Italy</td>
<td>1959</td>
</tr>
<tr>
<td>LGPA</td>
<td>Lithuania</td>
<td>2005</td>
</tr>
<tr>
<td>NEVEDI</td>
<td>The Netherlands</td>
<td>1959</td>
</tr>
<tr>
<td>IZP</td>
<td>Poland</td>
<td>2004 (2001)</td>
</tr>
<tr>
<td>IACA</td>
<td>Portugal</td>
<td>1986 (1976)</td>
</tr>
<tr>
<td>ANFNC</td>
<td>Romania</td>
<td>2014</td>
</tr>
<tr>
<td>GZS</td>
<td>Slovenia</td>
<td>2004</td>
</tr>
<tr>
<td>CESFAC</td>
<td>Spain</td>
<td>1986</td>
</tr>
<tr>
<td>FS</td>
<td>Sweden</td>
<td>1995</td>
</tr>
<tr>
<td>LANTMÄNNEN</td>
<td>Sweden</td>
<td>1995</td>
</tr>
<tr>
<td>AIC</td>
<td>United Kingdom</td>
<td>1973</td>
</tr>
</tbody>
</table>

### Observer Members

<table>
<thead>
<tr>
<th>Association</th>
<th>Country</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>RUFM</td>
<td>Russia</td>
<td>2010</td>
</tr>
<tr>
<td>SFMA</td>
<td>Serbia</td>
<td>2009</td>
</tr>
</tbody>
</table>

### Associate Members

<table>
<thead>
<tr>
<th>Association</th>
<th>Year (First Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EFFPA</td>
<td>2014</td>
</tr>
<tr>
<td>EMFEMA</td>
<td>2003</td>
</tr>
<tr>
<td>NSF</td>
<td>Norway</td>
</tr>
<tr>
<td>FKAS</td>
<td>Norway</td>
</tr>
<tr>
<td>Norkorn</td>
<td>Norway</td>
</tr>
<tr>
<td>VSF</td>
<td>Switzerland</td>
</tr>
<tr>
<td>TURKIYEM</td>
<td>Turkey</td>
</tr>
</tbody>
</table>

### Potential Active Members

- Estonia
- Latvia
- Malta

* EUROFAC took over from SNIA in 2016

**Situation on 1 June 2016**