



EU-27 Geopolitical Vulnerability for the Supply of Vitamins for Feed Use

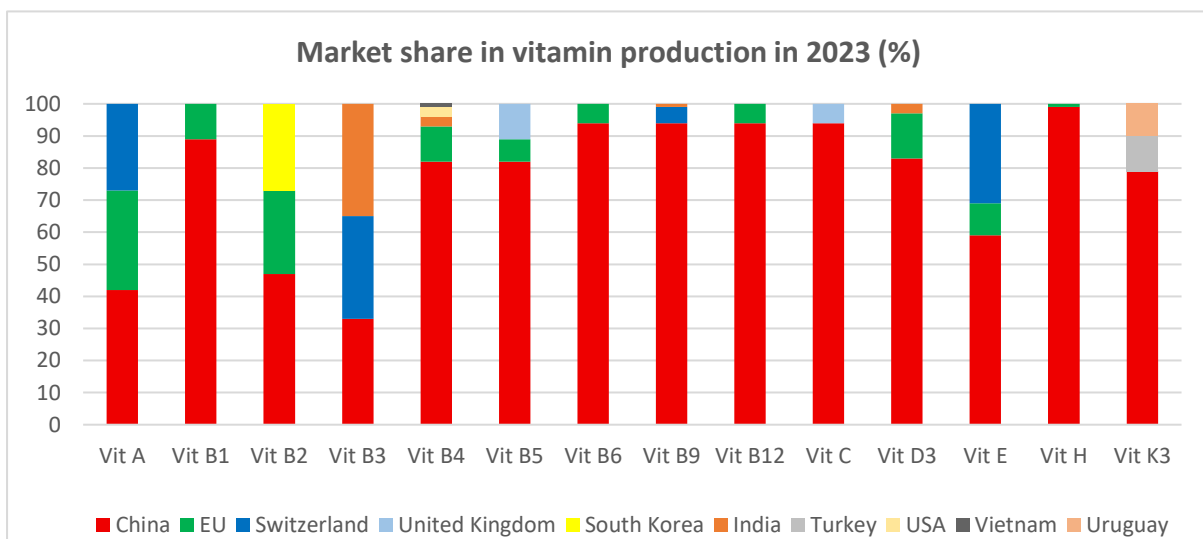
Overall geopolitical vulnerability

Supplementation of feed with sufficient quantities of vitamins is a prerequisite for animal health & welfare and performances whatever the animal farming system.

Very low	Low	Medium	High	Very high
	Vitamin A and B2	Vitamin B3	Vitamins B1, B4, B5, B6, B12, C, D3, E and K3	Vitamins B9 and H

Global market concentration

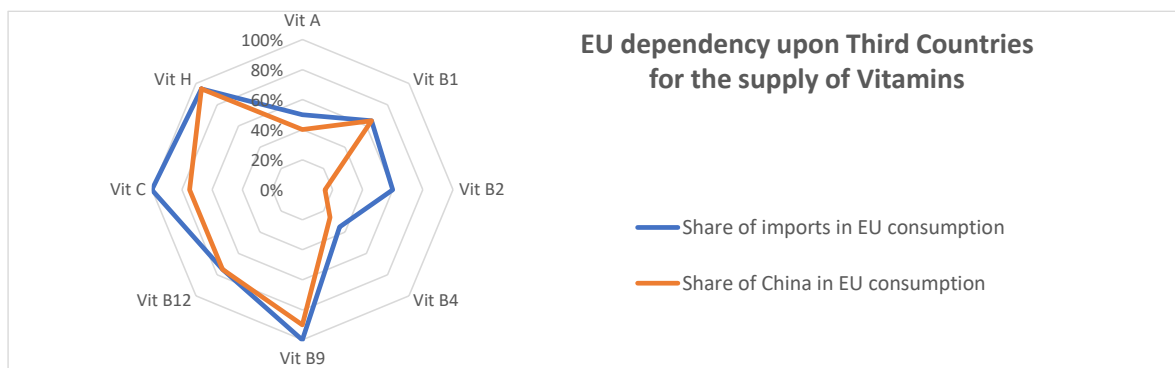
China is the only country producing all vitamins with a global market share between 34 and 99%.



- The global market of vitamins is highly concentrated with only 10 producing countries, thereof no more than 2 to 3 for most vitamins.
- The EU-27 produces 10 vitamins, with a global market share between 1 and 31%. Other significant producers apart from China are Switzerland, the UK and India.

EU-27 dependency

The EU-27 imports 35 to 100% of its feed use of vitamins, thereof 70% from China.

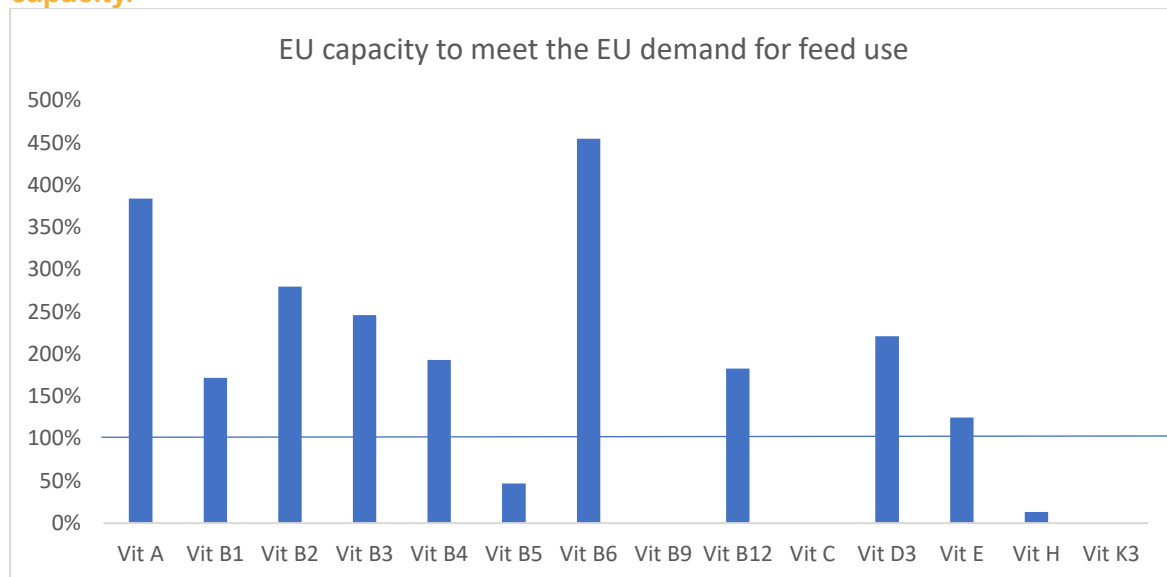


- China represents between 50 and 100% of vitamins imported in the EU-27, with an average of 70%.
- The EU-27 is fully dependent upon Third Countries for its supply in vitamins C, B9 and K3 and more than 80% for vitamins B3, B12 and H.
- The level of dependency for vitamins produced by chemical synthesis may be underestimated due to the dependency of EU-27 producers upon third countries for the use of precursors.

EU-27 autonomy potential¹

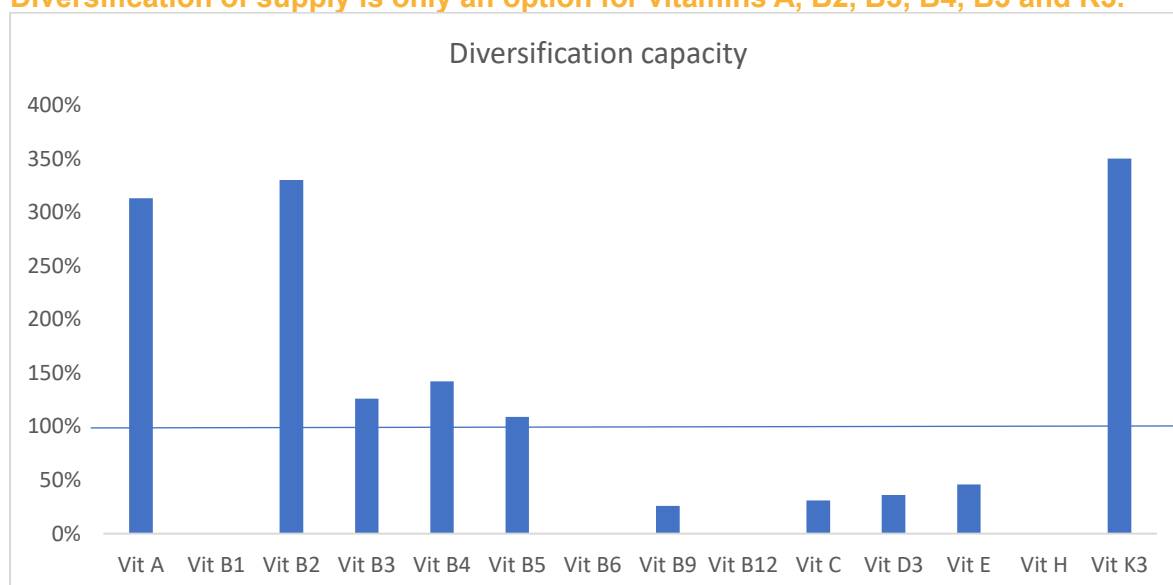
To be autonomous, the EU-27 would need to invest in production capacity to meet the EU-27 feed demand for vitamins B5, B9, B12, C, H and K3.

For all other vitamins, the issue is mostly a deficit of competitiveness of the EU producing industry, which may ultimately compromise the maintenance of production capacity.



EU-27 diversification potential²

Diversification of supply is only an option for vitamins A, B2, B3, B4, B5 and K3.



Disclaimer: The information above is the result of a vulnerability assessment for access to vitamins and amino acids, performed by FEFAC in spring 2025. These results are based to a large extent on expert data and, while we endeavour to reach a high level of quality and robustness of the data, we make no representations or warranties of any kind, express or implied, about their completeness, accuracy, reliability, suitability or availability. Any reliance you place on these data is therefore strictly at your own risk.

¹ Autonomy potential is the ability to meet the EU demand when making use of the full production capacity

² Diversification of supply is the ability to replace imports from high geopolitical risk countries by imports from low and medium risk. However, in absence of specific import data for vitamins B3, B5, B9, D3 and K3, a proxy was used for estimates of imports from high geopolitical risk countries, i.e. the difference between EU consumption and EU production for vitamins B5, B9, D3 and K3, and 33% of EU consumption for Vitamin B3.