



FEFAC

The EU compound feed industry views on the soya sector

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FEFAC President

28th February 2007

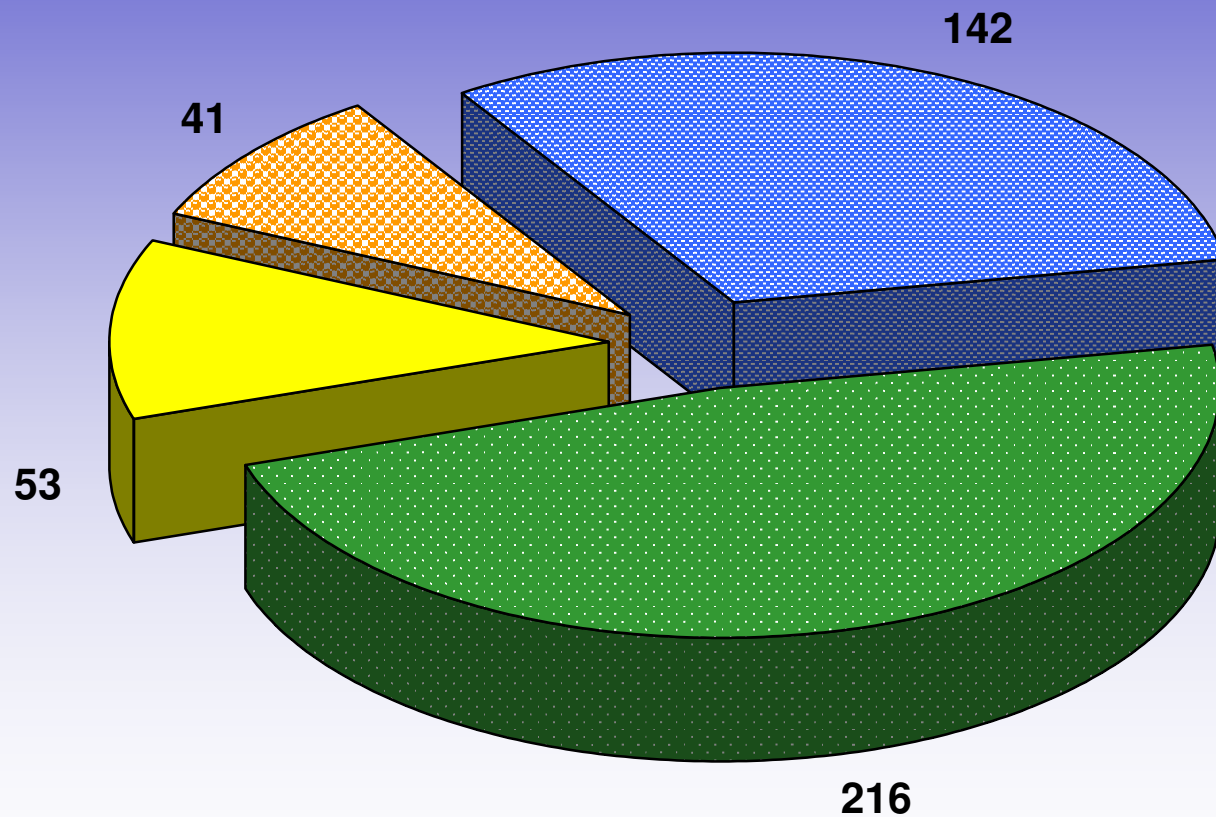
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FEFAC membership

Active members	Observer members	Associated members
<ul style="list-style-type: none"> • Austria – VFÖ • Cyprus – CAFM • Denmark – DAKOFO • France – SNIA • Greece – SEVIZ • Ireland – IGFA • Lithuania – LGPA • Poland – IZBA • Slovakia – AFPWTC • Spain – CESFAC • United Kingdom – AIC 	<ul style="list-style-type: none"> • Switzerland – VSF • Turkey 	<ul style="list-style-type: none"> • Norway - FHL • EMFEMA
First contacts with Estonia, Latvia, Malta, Romania, Bulgaria, Hungary - HGFA		

EU-25 Livestock sourcing in feedingstuffs - 452 mio. t in 2005

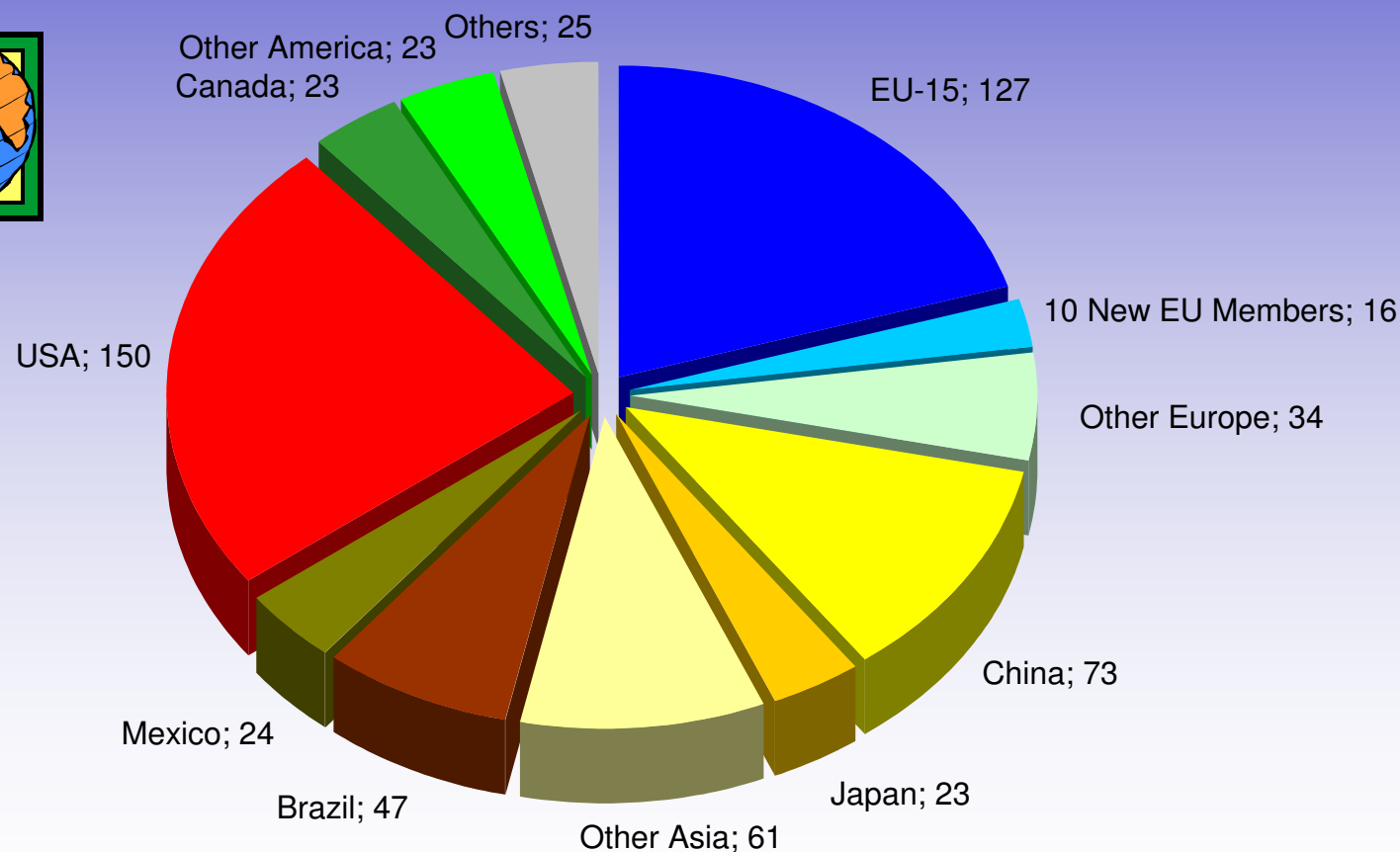


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 Forages	 Home-grown cereals
 Purchased straight feedingstuffs	 Industrial compound feed

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Global compound feed production in 2005 (mio. t)

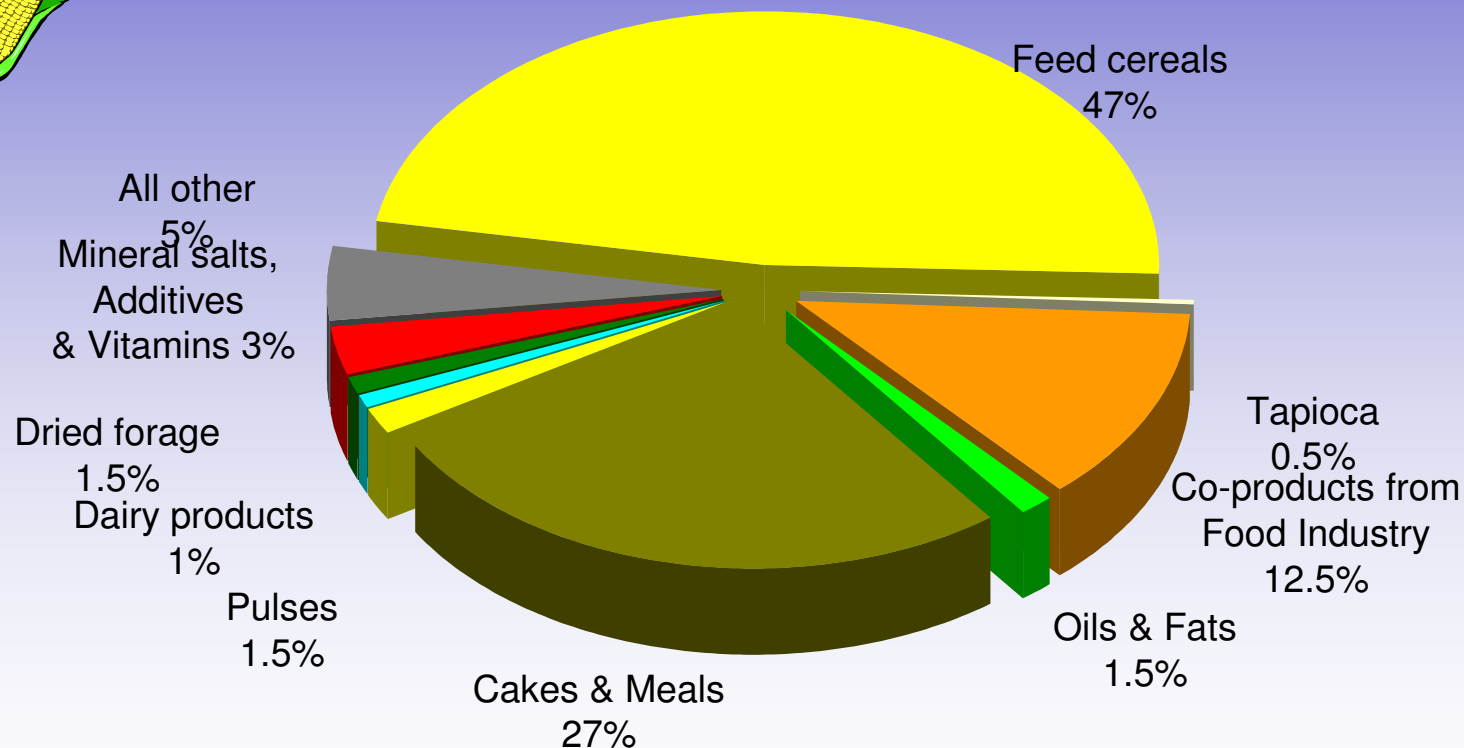


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Feed material consumption by the EU-25 feed industry in 2005

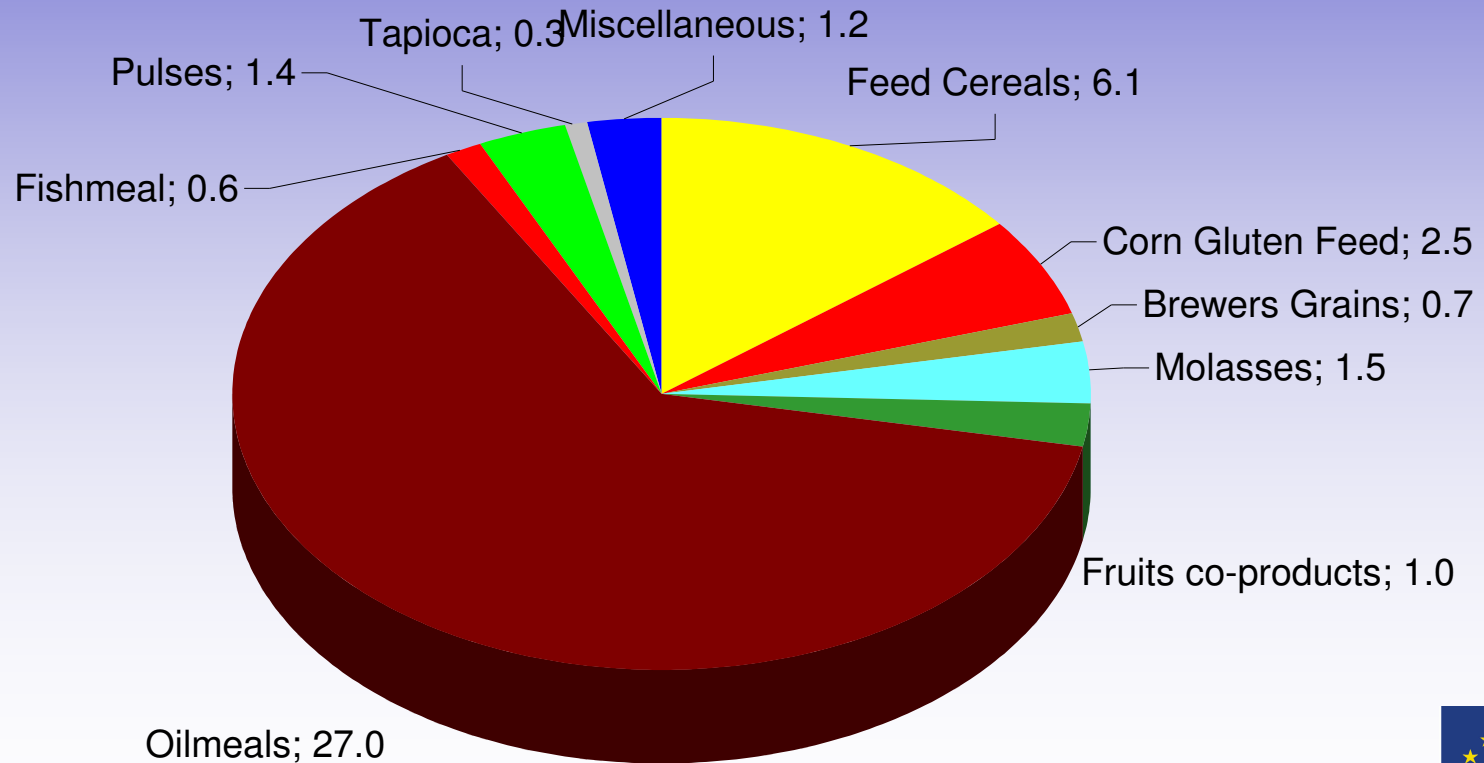


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Imports of feed materials in the EU-25 in 2004: 45 mio. t

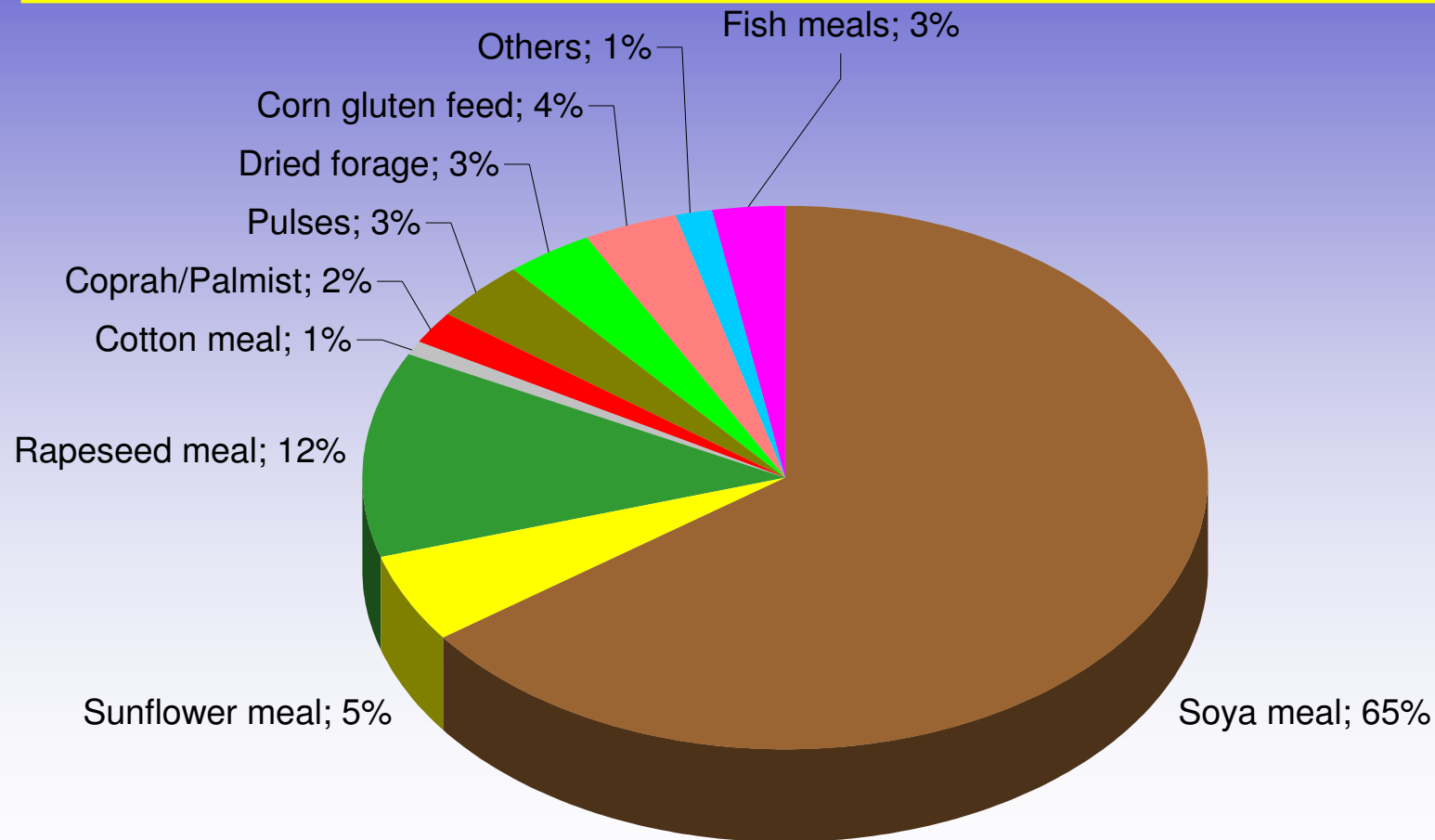


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Origin of proteins used for animal feeding in the EU-25 in 05/06



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EU-25 balance sheet for protein rich feed materials in 05/06

1,000 †

	EU production (*)		EU consumption (**)		Self-sufficiency
	Products	Proteins	Products	Proteins	
Soyabean meal	726	319	34,784	15,305	2%
Sunflower meal	1,988	381	4,503	1,225	46%
Rapeseed meal	8,291	2,079	9,254	2,868	92%
Cottonseed meal	512	179	511	198	100%
Copra-Palm meal	0	0	3,130	501	0%
Pulses	3,350	754	3,850	810	87%
Dried forage	4,600	736	4,400	784	105%
Corn gluten feed	2,193	430	4,550	893	48%
Miscellaneous	376	71	1,047	307	29%
Sub-Total		4,949		22,891	25%
Fishmeal	521	370	982	651	53%
Total		5,319		23,542	26%

(*): EU production from EU seeds

(**): Including consumption by the petfood industry and on-farm uses

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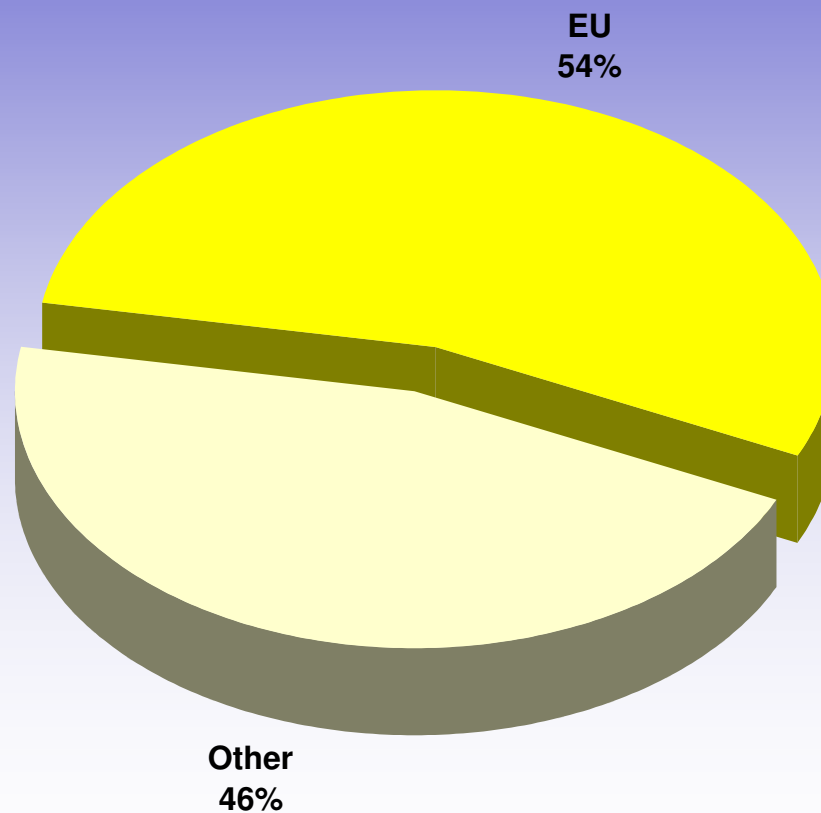
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Corrected (*) global oilmeals imports in 2006/07: 70 mio. t

(*) Oilmeals produced in the EU from imported oilseeds are regarded as imported by the EU



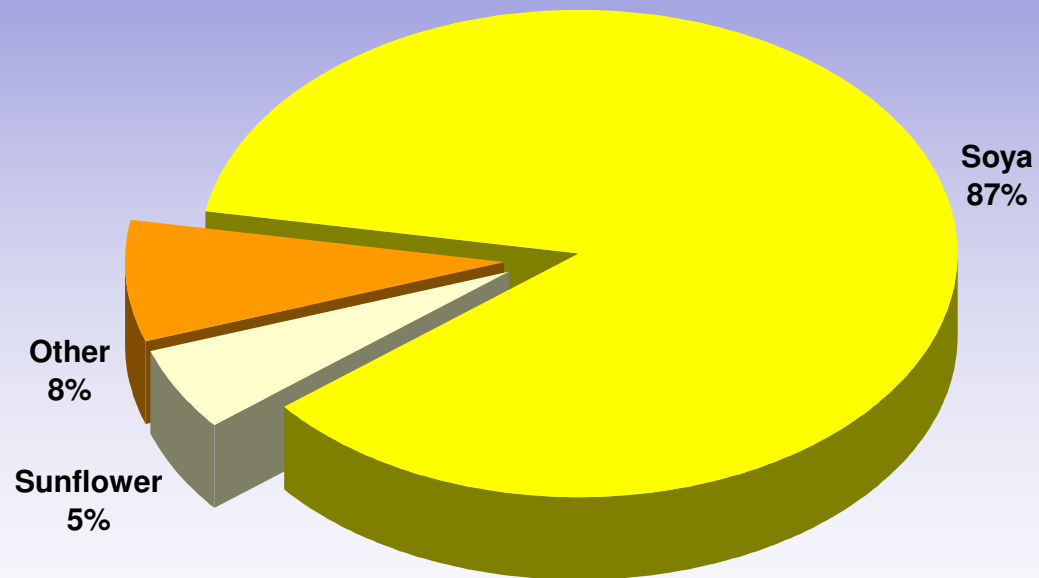
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EU corrected(*) imports of oilseed meals by type of oilseed in 2005: 37 mio. t

(*) Oilmeals produced in the EU from imported oilseeds are regarded as imported oilmeals



Soyabean meal account for 87% of the EU corrected imports of oilmeals.

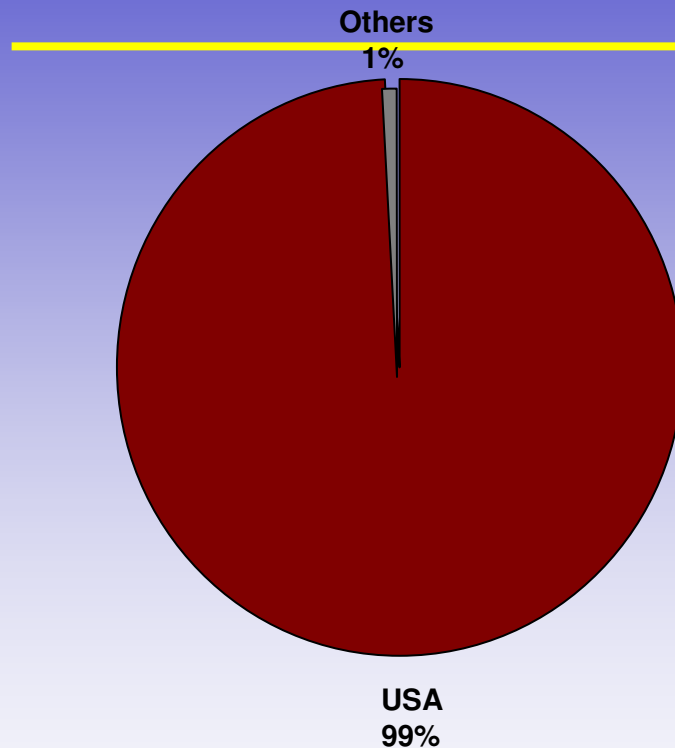
Corrected imports of soybeanmeal from USA, Argentina and Brazil account for 82% of the EU imports of oilmeals

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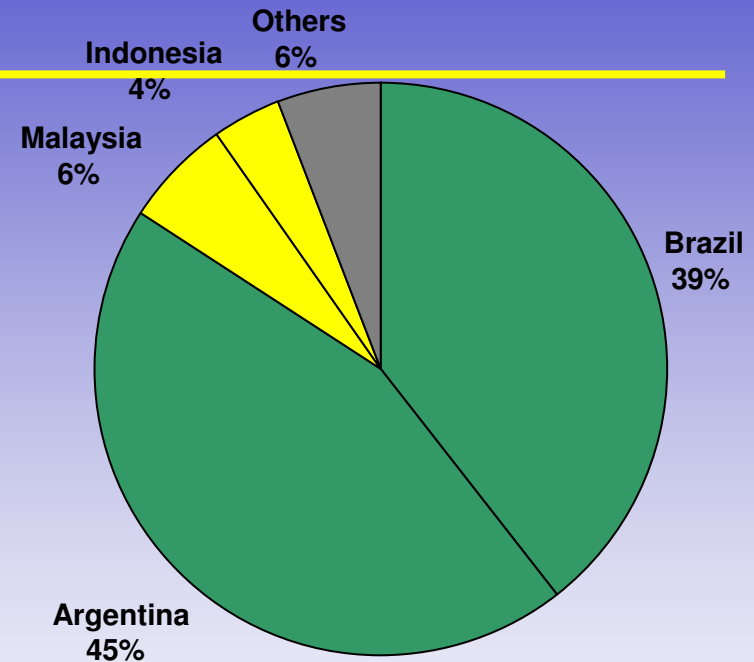
ORIGIN OF CORN GLUTEN FEED IMPORTED IN THE EU-25 IN 2004



- Others: Ukraine, Canada, Argentina, Bulgaria, Romania South Africa and Norway

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ORIGIN OF OILSEED MEALS IMPORTED IN THE EU-25 IN 2004

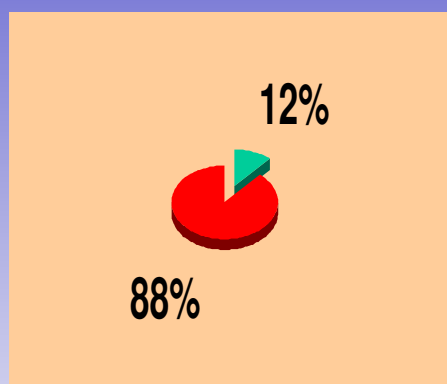


- Others: Ukraine, Russia, Romania, Norway, Virgin Islands, Philippines, Nigeria and 43 other countries

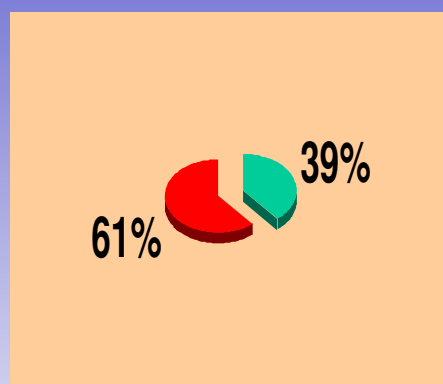
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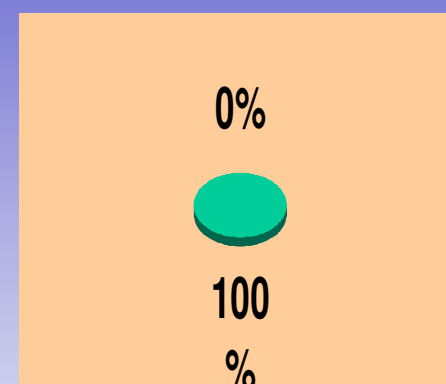
Proportion of EU-25 imports of feedingstuffs of potential GM origin in 2005



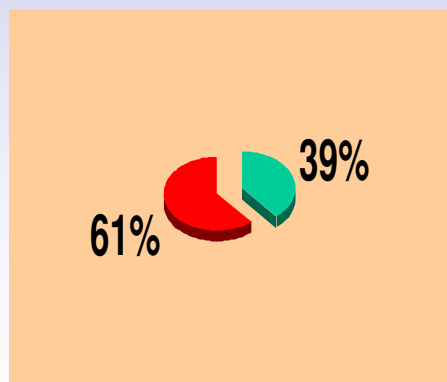
Soybean meal (including EU production from imported seeds)



Maize and co-products from the maize industry



Other imported feed materials



Total



Conventional

Potentially GMO

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FEFAC-position on GMO

- Recognises potential benefits of GM technology
- Is aware of the need to improve public information / acceptance
- Takes measures to source EU authorised GM-products only
- Implements properly the EU legislation on GM-labelling (only 6% non compliance according to EU Commission)
- Supports feed production meeting customers' demands

The feed industry contribution to sustainable development

- Improvement of feed efficiency
- Reduction of nitrogen and phosphorous in animal effluents
- Valorisation of by-products from the food industry
- Participation in stakeholders initiatives for the establishment of sustainable criteria
 - CONSENSUS project for a sustainable aquaculture
 - Round Table for Responsible Soy

FEFAC position on RTRS

- Supports the environmental, social and economic balance in Soy production
- Supports the 9 principles of the RTRS
- Supports a global wide approach
- Will become member of the RTRS
- Will appoint experts from the feed industry for the working groups
- (The feed industry) is prepared to participate in the costs for the launch project