

# RESOURCE EFFICIENCY CHAMPIONS OF THE FOOD CHAIN FOR 60 YEARS







Nick Major, FEFAC President

### **A Moment of Celebration with our Eyes on the Future**

Dear Reader,

This publication celebrates 60 years of FEFAC, meaning 60 years of feed industry representation at an institutional level. FEFAC's membership growth from 5 founding members to 30 national and European feed industry organisations is rooted in the establishment and expansion of the European Union. The combined strength of the FEFAC National Member Associations has proved to be a reliable "road-tested" model for success, which today serves the interests of approximately 3500 compound feed manufacturer factories throughout Europe. This federation model has been a core factor in FEFAC's success and is definitely fit for the future.

Our anniversary event on 6 June 2019 in Brussels, using the key theme of "resource efficiency champions of the food chain for 60 years", also provides an excellent opportunity to look towards the future rather than the past. The FEFAC Animal Feed Industry Vision 2030, with its three pillars on Sustainability, Animal Nutrition and Feed Safety offers a clear roadmap of how the strengths of the feed industry can contribute to a sustainable, competitive livestock sector. We support our livestock farming community by delivering the safe, sustainable and nutritious feed for the production of a huge diversity of high-quality animal products, enjoyed by so many consumers in Europe and in global markets.

We should, however, not be blind to the evolving societal demands and challenges, in particular for the European livestock sector in the global context. In many European countries our members are facing pressure to develop a more sustainable livestock sector. This is not necessarily a bad thing, as it may also present new market opportunities. However, there should be no mistake that activist-driven agendas and campaigns only leave a one-way street "outcome" towards exporting our agricultural and livestock sectors to third countries. Europe will just end up importing agricultural and animal products into Europe that were produced with a more flexible legal framework, undercutting the EU's increasingly restrictive safety, environmental and social standards.

At the 6<sup>th</sup> Global Food & Feed Congress (GFFC) 2019 held in Bangkok, Thailand, organised by the International Feed Industry Federation (IFIF), the conference theme question was whether the feed sector was "ready for the future" of serving the growing global demand for animal protein. Many of our partners overseas are looking at Europe through their "rear view mirror", as they consider it is increasingly deviating from the path of a science-based approach, thereby condemning its farming sector to become a museum. As a sector, we will support our farmer's fight for the right to make use of the best tools research and innovation can offer.

The feed industry needs to publicly engage, in cooperation with our livestock partners, to ensure consumer choices are based on objective information. We have started to successfully implement the 2030 Vision to show which solutions animal nutrition can provide to meet societal demands, thus ensuring our "licence to produce" and making sure we are able to celebrate our 100<sup>th</sup> anniversary in 2059 as a reliable, knowledge driven partner of the livestock community.

A handwritten signature in black ink, appearing to be 'Nick Major', written in a cursive style.

**Nick Major**  
President



**THE FEFAC ANIMAL FEED INDUSTRY VISION 2030**[From Vision to Implementation](#)

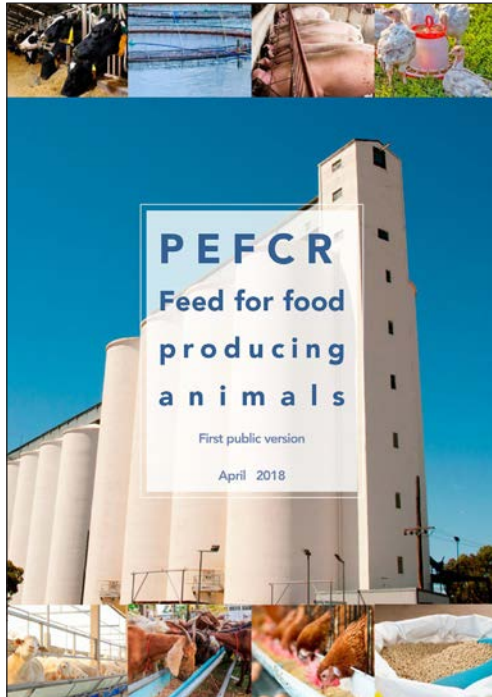
FEFAC's shared membership ambition, laid down in its Animal Feed Industry Vision 2030 is to supply safe, sustainable and competitive feed to our farmer customers who serve the growing appetite of both European and global consumers for high quality products of animal origin, produced to the highest quality standards. Societal expectations regarding the need to reduce greenhouse gas emissions and antibiotics use at farm level have to be tackled, feed materials should be produced and sourced responsibly meeting ever increasing environmental and social criteria and animal welfare standards are constantly rising.

Modern animal husbandry always has been a highly demanding and challenging entrepreneurial activity, but European livestock farmers are continuously asked to do better. Livestock farmers rightfully raise their own expectations from supplying industries and call for a level-playing field with third country competitors exporting to Europe. Livestock farmers require and deserve a decent return on investment and they expect technological innovation to improve their working conditions, for example by further minimisation of physical labour and occupational hazards, and optimal protection from safety hazards.

The European Compound Feed Industry stands besides livestock farmers as their business partner with innovative solutions and services to help them on their way to meeting current and future societal challenges. FEFAC has developed an Animal Feed Industry Vision 2030 to explore the benefits and contributions of the feed industry. The feed industry adapts to the need of individual farmers, bringing the most appropriate product or service, whether it is complete feed, complementary feed or dietetic feed to address specific needs of animals at specific physiological stages.

The feed manufacturer is also one of the key suppliers with continuous on-farm interaction with the livestock farmer to deliver professional advice on how to optimise the use of feed, feed formulation for balanced, cost-effective diets and how to implement holistic livestock management strategies meeting biosecurity, animal health and welfare requirements. All these contributions sum up the added value of choosing industrial feed production, which guarantees achieving the highest levels of production standards. FEFAC, therefore, structured its 2030 Vision into three key pillars: 1. Sustainability, 2. Animal Nutrition Science & Feed Processing Technology, 3. Feed Safety Management.





## SUSTAINABILITY

Sustainable livestock farming is complex to define, however it is sure that particularly for monogastric farm animals (e.g. pigs, poultry and fish), feed plays a key role. Sustainability is a dynamic concept with no absolute criteria to determine whether a formulated feed is sustainable or not. FEFAC has already delivered on transparent tools that help feed manufacturers assess their environmental performance and work out their sourcing policies. In a next step, the feed industry will seek to establish a broader set of meaningful indicators that provide a better framework how to measure the “feed sustainability” of a given feed formulation.

## Circular Economy

The feed industry’s core contribution to sustainable livestock farming is the use of co-products from the food and biofuel industries. It is the strength of animal nutrition science to extract the nutritional and economic value from those co-products and formulate them into a performant, nutritious and healthy diet for food-producing animals. It is all about the skilful analysis of the nutritional components that become available through co-products and match them with the physiological nutrient requirements of a specific farm animal at a specific life stage. It includes controlling the naturally occurring substances that may have a negative effect on animal health or performance, the so-called anti-nutrients, while also the taste, quality and safety of animal products produced and purchased by consumers should not be negatively affected, and where possible even enhanced. The use of co-products is the “essence” of animal nutrition and justifies its claim as resource efficiency champions of the food chain.

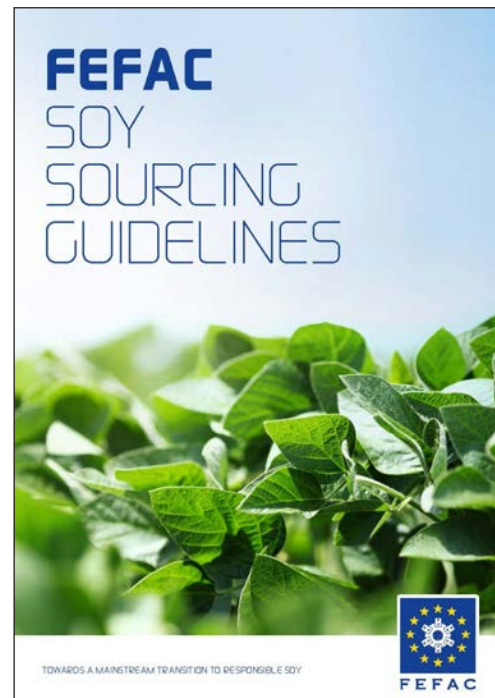


### Calculating the environmental footprint

The environmental footprint of animal products is determined to a large extent by the environmental footprint of the feed, especially for poultry, pigs and fish. The significant emission reduction targets set by Member States for all economic sectors as their commitment to meet climate change targets laid down in the Paris COP21 convention, will result in increased policy pressure on the livestock sector to contribute to this goal. The rules of environmental performance measurement for feed have been approved and published through the EU-coordinated Product Environmental Footprint initiative. The "PEFCR Feed for Food-Producing Animals" provides a harmonised, robust, consistent and accurate methodology that sets the scene for a level playing field for the production of low emission feed. At the same time, FEFAC has invested in the establishment of the GFLI (Global Feed LCA Institute) Database, which will provide information on the environmental performance of key feed ingredients. The GFLI database was developed together with IFIF, AFIA (US) and ANAC (Canada) and is compliant with the rules of the PEFCR Feed for Food-Producing Animals, meaning they can be used in combination. The delivery of these tools is a milestone for the European compound feed industry, as there is now a robust, credible and transparent LCA methodology that allows to accurately and consistently assess the feed sector's emissions "pre-farm gate". This will allow compound feed manufacturers to demonstrate their capacity to help reduce environmental impacts linked to livestock production through the formulation of "low emission" feed diets.

### Responsible Soy

FEFAC has been involved in facilitating the production and trade of responsible soy since 2006. A milestone was reached in 2015 with the publication of the FEFAC Soy Sourcing Guidelines. The Guidelines represent a professional recommendation for feed operators who wish to source their soy in accordance with the European feed industry's requirements of responsible production. The Guidelines are FEFAC's biggest asset in the way forward to tackling soy-related deforestation, implement good agricultural practice and social standards as well as a means to create transparency in a fragmented market. The main objective is to contribute to the transformation of the mainstream market supply of responsible soy for the European feed and livestock sector.





## **ANIMAL NUTRITION SCIENCE / FEED PROCESSING TECHNOLOGY**

Animal nutrition science and feed processing technology form the heart of the European industrial compound feed sector. Both have evolved and developed over the years, delivering better performance, as measured by the feed conversion rate, reducing the amount of feed needed to produce a kilogram of meat, milk or dairy products. The key parameters of animal nutrition science used to be based on the crude content of proteins, fats and fibre. Nowadays, the indicators of the animal nutritional requirements are based on digestible amino acids, bioavailability of minerals, micro ingredients (e.g. enzymes, gut flora stabilisers) and the identification and neutralisation of anti-nutritional factors. Innovative formulation can also be credited for reducing the exposure of livestock farmers to fine particles caused by the dusting potential of feed.

Feed processing technology has moved well beyond the simple milling and mixing of feed ingredients. The investment in heavy duty industrial equipment with high technological and “smart” power have over the years given feed manufacturers the capacity to operate specific processes with well-defined objectives. The grinding, pelleting, conditioning, coating and rumen protection all have their intended effects on animal performance, health, welfare, environment and animal product quality. The newest technological developments allow for further exploitation of the full potential from feed and its components, whether nutritionally or for other specific functions.

### **Optimising Animal Health Management**

The contribution of feed solutions to enhancing the health status of farm animals has received scientific and political recognition. The interaction of specially grinded, nutritionally-balanced feed with the gut of an animal is a key factor in maintaining its health, provided that the animal can prosper in optimal housing and hygiene conditions. Farm animals that don't fall ill, automatically have less need for veterinary

treatment with antibiotics, meaning that the feed industry solutions can make an impact on reducing the occurrence of antimicrobial resistance (AMR).

Though the veterinarian should always remain the primary advisor assisting livestock farmers in the design of their farm health management, FEFAC argues for the systematic use of the animal nutrition expertise. EU Member States should include the role of animal nutrition in their national AMR action plans on preventive measures. Feed operators need more legal flexibility to communicate to livestock farmers about the added value of certain feeding strategies or formulations, based on scientific evidence, regarding the benefits in terms of animal health & welfare.

### **Boosting Efficiency & Reducing Emissions**

The decrease in feed conversion ratio is an important classical indicator of reduced livestock emissions per unit of animal product. Nutrient efficiency in feed formulation with the help of synthetic amino acids, phytase and protease is another direct method that helps to reduce energy and nutrient losses through manure of particularly nitrogen, phosphorous, copper and zinc. Recent scientific advancements are delivering innovative nutritional solutions that can impact what farm animals directly emit, particularly cattle. Specific feed materials and feed additives are looking into limiting the emission of methane, a very potent GHG. At the same time, optimising nutrient efficiency will remain an essential element in maintaining competitiveness of livestock farmers.

### **Supporting Animal Welfare**

Animal behaviour is largely determined by genetics and housing, but feed can also have a positive impact. Animal welfare challenges, such as tail-biting between pigs and the pecking between chickens are problems that can arise for livestock farmers. Research into the development of new feeding strategies is ongoing to tackle these issues.





## **FEED SAFETY MANAGEMENT**

Feed safety is the absolute priority in industrial compound feed manufacturing. A lot of progress has been made, but new feed safety incidents show that the livestock chain remains vulnerable to changes in the food and biofuel production process and potential fraud. The compound feed sector has a proven track record of an increased robustness of its own-control programmes, with on average about half of the RASFF notifications resulting from own-controls

### **Capacity building**

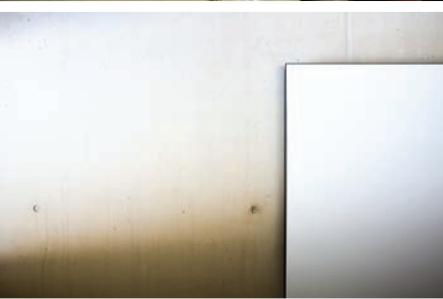
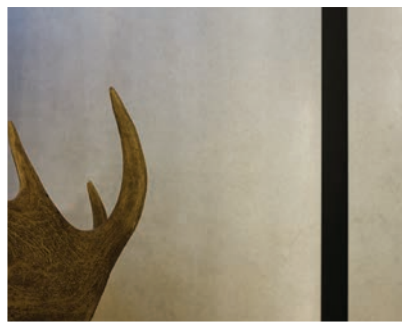
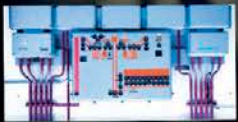
Compound feed manufacturers have an industrial and analytical capacity that is of great service to livestock farmers. They are able to handle ingredients and substances that require strict compliance with legal requirements for their safe incorporation in feed (homogeneity of mixture, compliance with maximum dosage requirements). In certain cases, the compound feed industry plays the role of gate keeper to the benefit of livestock farmers, by taking charge of the responsibility to secure the safety of feed ingredients on behalf of the suppliers. The knowledge and skills to correctly develop and apply an HACCP-based feed safety management system are the first step to improved risk management. Trade organisations shall continue to provide operators and public authorities with essential tools and generic information. Examples of tools are good hygiene practice, HACCP plan examples, geographical mapping (e.g. mycotoxins in grain harvest), early warning systems, collective monitoring schemes and databases for risk characterisation. FEFAC has led the way in capacity building with its European Feed Manufacturers Code and the facilitation of information sharing to its national associations via the FEFAC Feed Safety Incident Management Team.

### **Optimisation of risk management along the supply chain**

The biggest threats for feed safety do not occur at the feed production stage itself. Contaminations are mostly present in the supplied feed materials, meaning they were passed onto compound feed producers in a state of non-compliance. It would be common sense to try to intercept non-compliant feed at the earliest stage possible according to the “top-of-the-pyramid” principle, while not exempting downstream parts of the chain to implement controls/monitoring for verification purposes. Experience shows that the later in the chain a contamination case is identified, the more difficult and costly it will be to manage it correctly.

### **Co-operation with authorities**

Industry and competent authorities are aligned in their ambition to protect the food chain from contamination. Especially in times of safety incidents and the immediate need for appropriate and proportionate risk management options, the speed of reaction by feed operators and authorities is crucial to limit the magnitude of the problem. This should foster a mutually beneficial co-operation between the private and public sector on information sharing, while the independency and impartiality of competent authorities is still respected. Chain operators have knowledge about the risk of products under their control, whereas authorities have information on risk profiles of all sectors across the feed chain. Increased collaboration would help competent authorities to better target risk-based and cost-effective official controls, while in turn the feed industry could make their monitoring more efficient, in particular with a view to emerging hazards.







### **What is the biggest achievement of 60 years FEFAC as the European Feed Manufacturers Association?**

Achieving a 60 years anniversary is a good sign for an organisation. The members must have received benefit out of FEFAC, otherwise it would not have survived. The biggest achievement in my opinion is to be heard in the European institutions and to have developed a positive image for the industry. The feed manufacturers are accepted as a useful part in the food chain as a whole. That is thanks to the time and effort that all actors and managers dedicated to FEFAC over the years, which has benefited the association and the industry.

### **How will Garant implement the FEFAC 2030 Animal Feed Industry Vision?**

Garant follows the three pillars of the FEFAC 2030 Vision – Feed Safety Management, Animal Nutrition and Sustainability - since the last decade. I'm convinced that the implementation can never be reported as finished.

It's a continuous process that is more or less guided by the discussions that take place in society. In that sense, I see a priority for animal welfare. As feed producers, we have the important responsibility of respecting animals as live creatures, accommodating animal welfare demands and increasing nutrient efficiency.

### **What do you expect to be the biggest change for compound feed manufacturing from now to 2030?**

More digitalisation in the factories will improve the productivity and knowledge of how feed is digested by farm animals. Developments in animal breeding will increase

and support the way to constantly reduce the feed conversion rate. Together, they will contribute to more sustainable livestock farming.

### **How important will the role of animal nutrition in enhancing animal health & welfare be in 2030?**

All initiatives to the benefit of animal welfare are welcome. Our industry can only survive with acceptance of society. In the western world, large-scale livestock production without respect for living creatures will not last.



©Raiffeisenzeilung Pia Morpurgo  
Christoph Henöckl (Managing Director of Garant Tiernahrung GmbH, Austria)

### **What steps will supply chain risk management need to make in the road to 2030 to come to support optimal control of feed safety based on "top of the pyramid" principle?**

Production needs to be more transparent and always look for ways to positively engage with the competent authorities. To increase our own management of feed safety, we will invest in the proofing of our raw materials and the knowledge at employee level and we aspire to build on a higher level of understanding of our production process from our suppliers.

### **What will "feed sustainability" look like in 2030 in your company?**

I don't expect there to be many changes compared to now. Key criteria to sustainability are well-located feed mills in areas of livestock population and the purchase of local raw materials.

### **What kind of shifts in feed production & feed ingredient usage do you expect in the light of serving a sustainable livestock sector?**

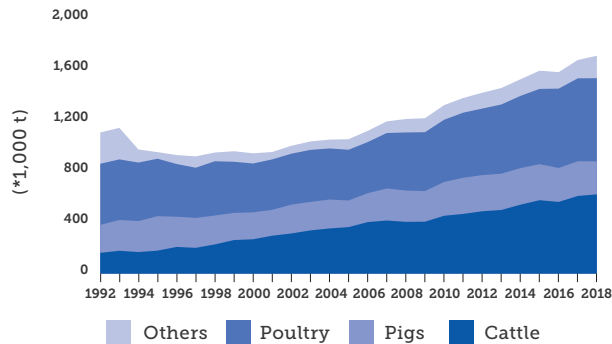
If the 'luxury position' in Europe we currently live in continues, we can also expect the discussions on raw materials derived from plants created with new breeding techniques to remain in the focus of NGOs and the media.



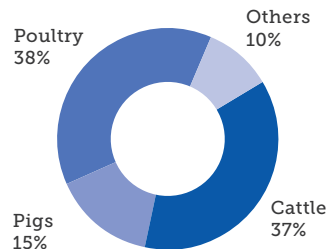
VFÖ



Evolution of national industrial compound feed production



National industrial compound feed production by animal category



**VFÖ (Austria)**

**Year of Foundation** 1995

**Number of members** 9

**Type of membership** Compound feed manufacturers

**Key priorities**

Supporting and representing the compound feed industry to improve the framework conditions for the branche as well as balancing interests.

**Key services to members**

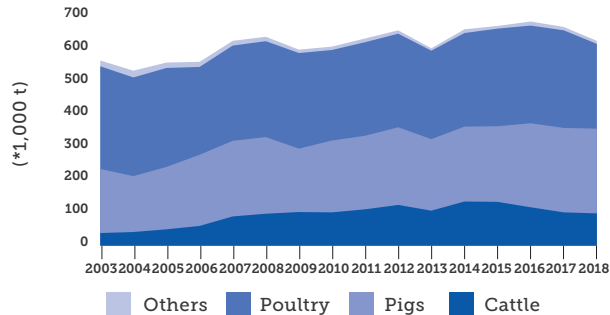
- Providing and exchanging legal and economic information
- Sector statistics
- Regular sector meetings

**Relationship with stakeholder environment**

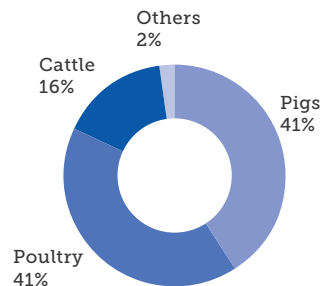
Representation before authorities and ministries



Evolution of national industrial compound feed production



National industrial compound feed production by animal category



### CFIA (Croatia)

**Year of Foundation** 1994

**Number of members** 80

**Type of membership** Compound feed manufacturers, premix producers, producers of feed supplements.

### Key priorities

CFIA represents, defends and promotes the interests of the Croatian compound feed industry to the Croatian institutions and on European level. Although primarily focused on compound feed producers, within structure of Croatian Chamber of Economy, it brings together the interests of all companies in the animal feed chain, feed and premix manufacturers, livestock and aquaculture producers.

### Key services to members

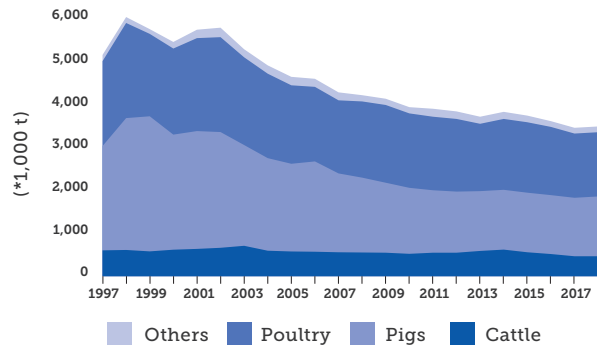
- Lobbying for a national legislative framework
- Education and information sharing
- Help with products marketing and promotion
- Technical infrastructure and support for association work and for projects participation

### Relationship with stakeholder environment

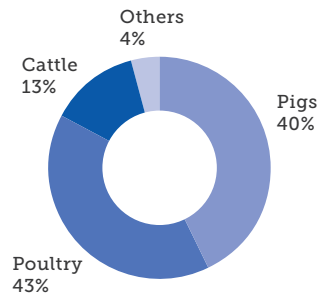
- Representation of members interest before public administrations at state, regional and local level
- Representation of members interest before third parties
- Representation of members interest before FEFAC
- Participation in various working groups and committees for drafting regulations, strategies etc.



*Evolution of national industrial compound feed production*



*National industrial compound feed production by animal category*



### HGFA (Hungary)

**Year of Foundation** 1968

**Type of membership** Compound feed manufacturers and premix producers

### Key priorities

HGFA is involved in research projects to improve the sustainability of resource efficient livestock production systems, looking for possibilities to reduce the emission of nitrogen and phosphorous into the environment. In parallel our other key priority is to support innovation related to compound feed and premix production.

### Key services to members

- Professional representation and safeguarding of interest of Hungarian compound feed and premix industry
- Regular updated information on market situation and changes in legislation
- Monitoring of calls for funding in the framework of Hungarian development programs
- Workshops in the Central European region

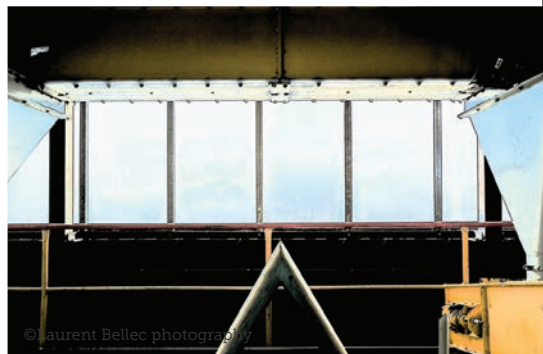
### Relationship with stakeholder environment

- Partnership Agreement with the Ministry of Agriculture and Hungarian Chamber of Agriculture
- Cooperation with the Research Institute of Agricultural Economics of Hungary
- Protein Plan













### **What is the biggest achievement of 60 years FEFAC as the European Feed Manufacturers Association?**

FEFAC has built a strong alliance that gave a voice to the European feed industry. FEFAC has managed to represent the sector adequately in an environment with diverging objectives from different stakeholders such as customers, suppliers and consumers.

### **How will deuka implement the FEFAC 2030 Animal Feed Industry Vision?**

As an integral part of our German Feed Association (DVT) and a long-time supporter of FEFAC, we are proud, supportive and very much part of the FEFAC 2030 Vision. The biggest challenge for the European feed industry going forward will be to fill the gap between the accelerating changing legal and technological demands against capital expenditure, amortisation and profitability.

### **What breakthrough progress can animal nutrition science still make on the way to 2030?**

Animal nutrition can become even more efficient in terms of feed efficiency. But first of all the livestock sector has to strive for a breakthrough in dramatically reducing negative consequences of animal wastes such as manure and GHG emissions, for example by turning them into a valued co-product in the sense of circular economy. In feed formulation, we'll see more optimised feed ingredients adapted to the growth stage of animals throughout their life. More and more ingredients will be prepared separately

with special treatments to improve nutrient utilisation, making use of advanced scientific knowledge.

### **How important will the role of animal nutrition be in enhancing animal health & welfare in 2030?**

With the worldwide change of the consumer's hierarchy of needs, meeting the demand for animal products respecting health & welfare will be obligatory. Feed producers can support livestock farmers through expert advice and consistent feed products.

### **What will your company do to increase its feed safety management between now and 2030?**

We are constantly monitoring and assessing our feed safety activities and we are in close dialogue with competent authorities to improve the industry standard accordingly and proactively. The feed industry shares the responsibility for the quality of raw materials and we will need the cooperation and support of the public sector, who have the same objectives.

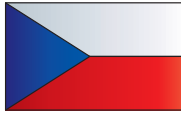
### **What will "feed sustainability" look like in 2030 in your company?**

Sustainability, especially in relation to feed, is always subject to a changing and developing mind-set. We will follow the discussions and adapt wherever possible, for example by signing a commitment to the FEFAC Soy Sourcing Guidelines. On the road to 2030, we don't always know in which direction public opinion will push us. However, our responsibility as a leading company also comes from being a citizen of this world and the parents of our children. We know we must fight misuse of antibiotics in animal husbandry and tackle negative consequences from land use change.

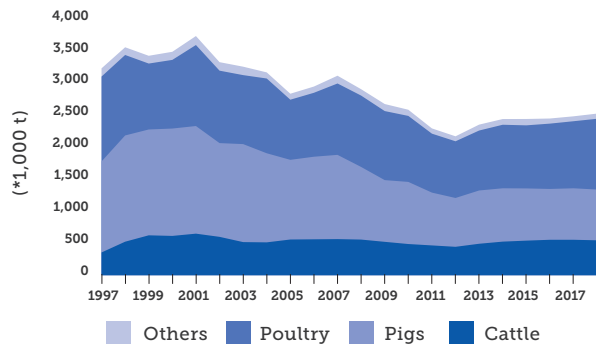


Ernst Friedlaender (left) and  
Ulrich Arning (right) – CEOs of deuka

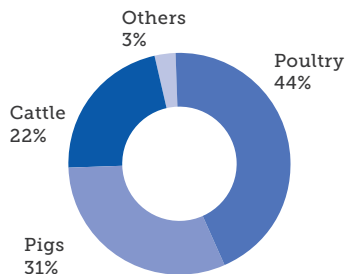




Evolution of national industrial compound feed production



National industrial compound feed production by animal category



**SKK - Commodities and Feed Association (Czech Republic)**  
**Year of Foundation** 1991

**Number of members** 44

**Type of membership** Compound feed producers, premix producers, traders and warehouse keepers

**Key priorities**

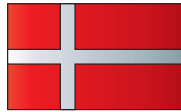
- Defending members' interests
- Negotiating with competent control authorities, Ministry of Agriculture, Agrarian and Food chamber, chain partners and stakeholders
- Communicating positions of the Czech feed industry in SCoPAFF, Copa-Cogeca feed taskforce and the European Parliament committees

**Key services to members**

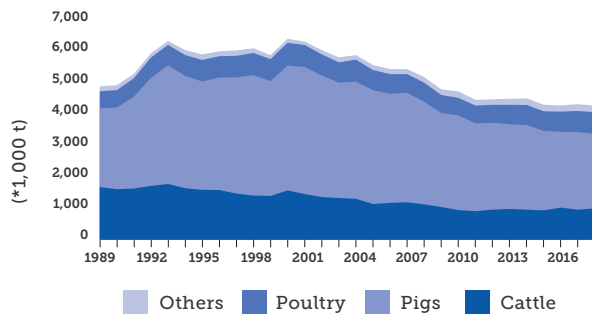
- Informing members about trends and developments in the EU feed industry through regular reports based on FEFAX, NewsFEED and other sources
- Educating members by organising conferences, seminars and ad-hoc trainings
- Helping members with access to national and EU subsidies
- Organising cooperation of the members with research and science institutions on specific issues
- Organising of sharing data amongst members on feed material sources risk level

**Relationship with stakeholder environment**

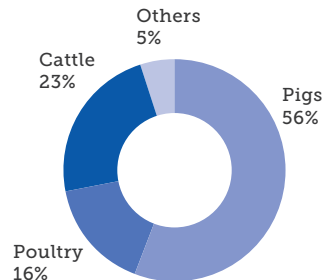
Membership in the Agrarian Chamber, the Food Chamber, the Sustainable Food Production Committee, the Commodities Council & the Council for Accreditation



Evolution of national industrial compound feed production



National industrial compound feed production by animal category



### DAKOFO (Denmark)

**Year of Foundation** 1974

**Number of members** 50

**Type of membership** Compound feed manufacturers (including fish feed), feed and grain traders and brokers, ingredient and speciality feed companies, companies involved in logistics for the sector, the seed sector and Danish plant breeders.

### Key priorities

- Trade relations, with a strong focus on exports
- Secure and stable raw material supply
- Sustainable feed supply to the Danish livestock sector
- Valuable relationships between involved stakeholders

### Key services to members

- Promoting trading possibilities
- Export services, trade protocols and market opening
- Sector services/sector agreements (feed safety agreements and framework for sector contracts)
- Dialogue and negotiation with authorities

### Relationship with stakeholder environment

- Membership in national and international platforms
- Danish Protein Innovation
- Crop Innovation Denmark





### **DURALIM, working together for a sustainable supply of livestock**

Food production raises many questions, particularly regarding the origin of raw materials, quality, resource management... Facing growing interest for these issues, French feed manufacturers have decided 6 years ago to work on more sustainability for feed production.

In 2013, a sustainability task force has met different stakeholders to better outline needs and expectations of the agricultural and food sectors. Stakeholders that were met at this time were raw materials suppliers, feed manufacturers, livestock producers, processing industrials, distribution / food services, consumers associations and NGOs. As a result of these meetings, needs for further work together on feed sustainability has emerged.

First French collaborative platform for sustainable feed, the Duralim platform was officially created in 2016. Duralim's mission is to promote and improve the sustainability of animal feed for livestock. Duralim responds to:

- Downstream expectations (to have their expertise recognized)
- Upstream expectations (to create a preference for their products)
- And social expectations (to reassure and restore confidence)

[www.duralim.org](http://www.duralim.org)

In 2018, Duralim members have taken a new commitment: to achieve 100% sustainable supply by 2025, with a goal of "zero deforestation". Three steps for the concept of "zero-deforestation" have been taken into account:

- 2020: Zero illegal deforestation (FEFAC Soy Sourcing Guidelines as reference)
- 2025: Zero gross deforestation
- 2030 with an additional objective "Zero conversion of natural ecosystems"

A concrete action plan and progression stages have been defined to reach this ambition within the defined deadlines.



[contact@duralim.org](mailto:contact@duralim.org)





**OQUALIM: together, let's meet the challenge of feed safety**

Quality and safety are essential for feed manufacturing. OQUALIM was created in 2008 with the aim of bringing together and advancing the animal feed industry on these issues.

Today, the association coordinates the collective approach of the French animal nutrition sector in terms of quality and feed safety of animal feed.

To achieve these objectives, two tools have been developed:

- Pooled self-monitoring plans
- And certification of animal feed plants with the RCNA (Animal Nutrition Certification Reference)



[oqualim.fr](http://oqualim.fr)

Pooled monitoring plans	Plans launched in...	Plan features
Complete feed	March 2009	- 77 participants - 191 production sites - 86% of feed production - Over 8,000 analyses per year
Supplements	March 2012	- 33 participants - 52 production sites - 91.5% of supplementary feed production (over 4,000 analyses per year)
Milk replacers	April 2015	- 5 participants - 89% of national production - Over 400 analyses per year
Organic feed	June 2011	- 17 participants - 18 production sites - 85% of organic feed production
GMO plan	March 2016	- 135 participating sites

Regular audits are carried out by third parties and compliance with hygiene requirements and best practices is verified.

With recognized technical and scientific expertise, OQUALIM now has more than 200 certified plants participating in shared plans.

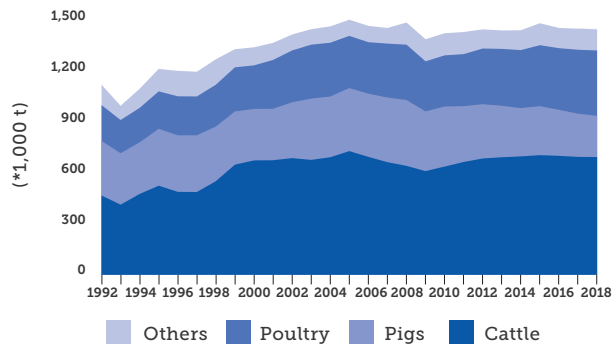
OQUALIM is a constantly evolving process, which works in collaboration with public authorities and is widely recognized as a quality response by the French animal production sectors. OQUALIM has also a mutual recognition agreement with the German (QS), Belgian (FCA), Dutch (GMP +) and British (FEMAS) schemes.

OQUALIM mutual control plans have existed for 10 years and concern 266 production sites: they gather each year more than 13 000 results of analyses.

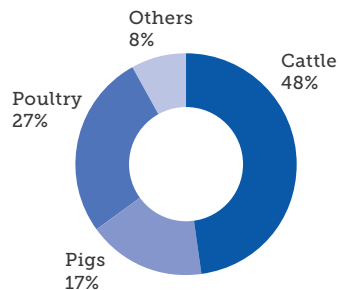
[contact@oqualim.fr](mailto:contact@oqualim.fr)



Evolution of national industrial compound feed production



National industrial compound feed production by animal category



### FFDIF (Finland)

**Year of Foundation** 1968

**Number of members** 6

**Type of membership** 6 compound feed, 2 premix, 1 feed additives

### Key priorities

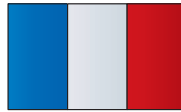
- To inform and influence the legislators and authorities concerning feed regulation related issues
- To promote the knowledge of feed industry's important role in developing animal production chain
- To improve feed industry's image as a cost efficient, safe and sustainable actor

### Key services to members

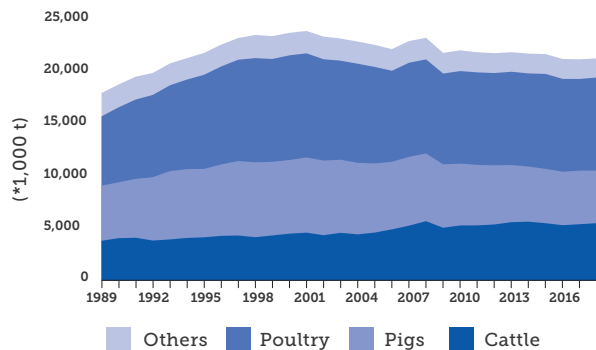
- Association is a forum to members to discuss and build together industry views about feed related topics.
- Official statements concerning legislative initiatives and application of regulations
- Representing the branch in public in joint non-competitive issues

### Relationship with stakeholder environment

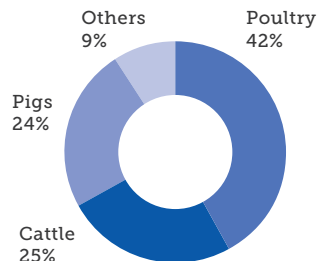
- Feed Association is a part of the Finnish Food and Drink Federation
- Regular connections to the Ministry of Agriculture and Feed control authorities. Dialogue with dairy and meat industries, farmer's union and advisory and environmental stakeholders



Evolution of national industrial compound feed production



National industrial compound feed production by animal category



### EUROFAC (France)

**Year of Foundation** 2016

**Type of membership** 3 French feed associations gathering French feed industries Compound feed and premixes manufacturers

### Key priorities

- Produce feed ensuring quality and safety throughout the production process towards consumers
- Work on a steady improvement in feed conversion rate to ensure animal welfare and optimize resources use
- Be fully involved in sustainability of the animal sector

### Key services to members

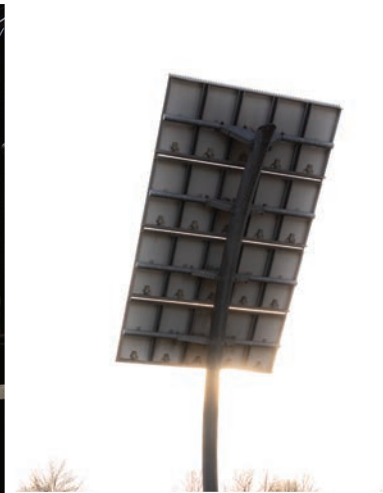
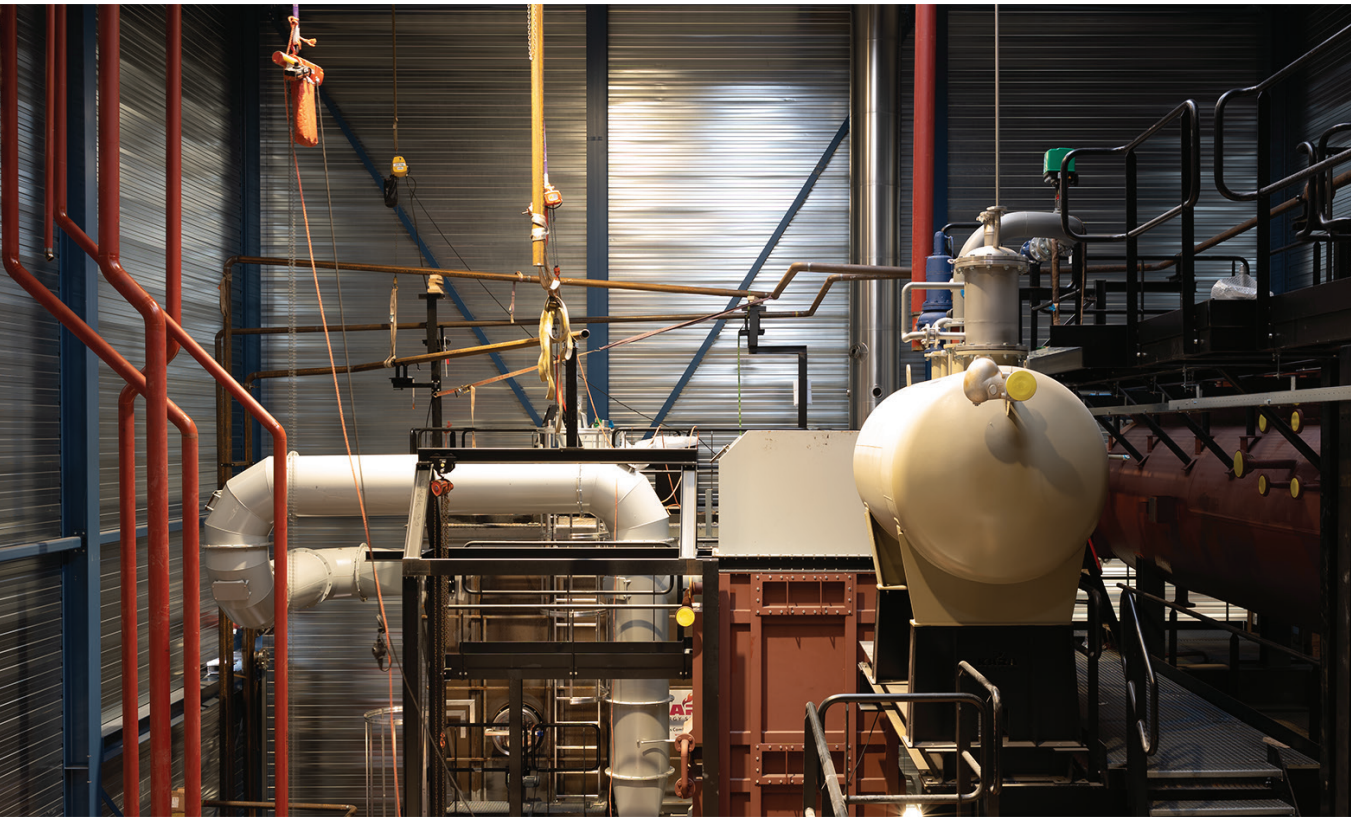
- Support for the competitiveness of the French feed industry
- Risk monitoring of feed ingredients (quality, safety...)
- Benchmark and recognition of feed safety schemes (OQUALIM)
- Guidelines for environmental footprint monitoring
- Support for French expertise in antimicrobial resistance

### Relationship with stakeholder environment

- Strengthen the position of French feed industry at European level
- Support European harmonization
- Promote the diversity and specificities of French agriculture











### How will ForFarmers implement the FEFAC 2030 Animal Feed Industry Vision?

ForFarmers takes a Total Feed approach and gives its very best “For the Future of Farming”: for the continuity of farming and for a financially secure sector that will continue to serve society for generations to come in a sustainable way. By working side-by-side with our farmer customers we aim to deliver real benefits: better returns, healthier livestock and greater efficiency. This is achieved by offering tailored and Total Feed solutions and a targeted approach combining innovative products, specialist and expert support and data driven tools.

### What is the biggest challenge for our sector?

The challenge of meeting climate change targets means that the entire European agricultural sector is being put under growing pressure. In addition, quality and provenance of food is increasingly important to consumers. Consumers in Western Europe are being told more and more often that it would be good to eat less meat. We have to address these concerns, and make sure our industry shows the good work being done but also commit ourselves to be more sustainable every day.

### What breakthrough progress can animal nutrition science still make on the way to 2030?

We will see a move towards precision feeding using a combination of automation, sensors and big data. This allows us to look at animals as individuals rather than in groups. This will mean more targeted nutrition and is also positive for animal health and welfare. We also need to replace raw materials that have a high impact on the environment and use more non-human edible materials.

### What end-consumer benefits can animal nutrition science deliver in the future?

Firstly the big trends are transparency and traceability. Consumers want to know where and how their food is produced. They will increasingly want to factor in the environmental impact of what they buy so I can see an increasing requirement to calculate and communicate CO<sub>2</sub> emissions throughout the food supply chain. The responsible use of antibiotics is another big issue for consumers so the work the feed industry is doing on the role of nutrition in helping farmers contribute to a reduction in the risk of AMR is important. Finally, animal health and welfare is so important, consumers don't want to feel guilty by supporting an industry that treats animals poorly.

### What will “feed sustainability” look like in 2030 in your company?

I think the traditional approach to sustainability in the feed industry which focuses on “more from less” has taken us a long way but is not the only answer for the longer term. We also adhere to a more circular approach to agriculture and will be a front runner in developing this way of thinking and working in the feed industry. Our industry is already recognised by the European Commission in this regard because of the use of co-products and by-products as feed materials. This is something we will build on over the next few years.

### Which dimension of “feed sustainability” is the most important?

I would highlight two dimensions. The first one is environmental footprint including deforestation

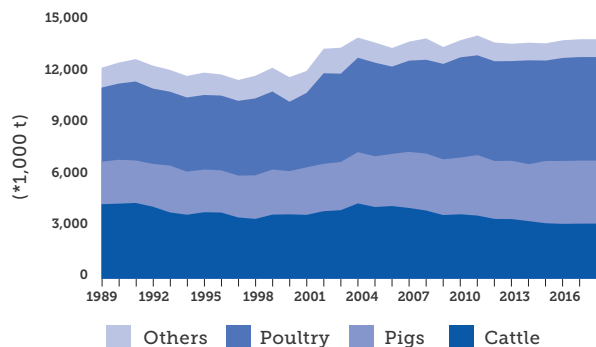
and the second is our ability to use feed materials which are not human inedible. There is a view that regional or local sourcing of raw materials has to be better than importing from outside Europe. But the consequence could be that greenhouse gas emissions are higher because crops are then grown in suboptimal conditions. Finally we have to ensure a level playing field both within Europe and with importing countries otherwise we just export our livestock industry to other countries where livestock production is less efficient.



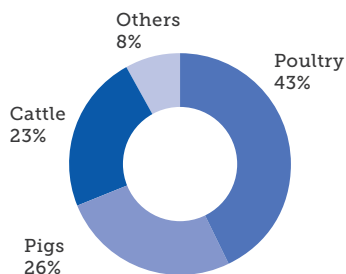
Yoram Knoop – CEO of ForFarmers



Evolution of national industrial compound feed production



National industrial compound feed production by animal category



### ASSALZOO (Italy)

**Year of Foundation** 1945

**Number of members** 100

**Type of membership** Assalzo represents the Italian feed industry producers, including additive, premixture and compound feed for food producing animals and pet-food

#### Key priorities:

Assalzo protects the interest of the feed chain, interacting with authorities and third chain parties (livestock producers association, feed ingredients supplier association). We work on projects on economic and environmental sustainability and recently published two books on livestock and sustainability with the Animal Science and Production Association.

Feed safety remains a key priority, with regular sector meetings on specific topics to improve general knowledge. We promote innovation and work together with the farm union to increase the Italian corn production.

On communication, Assalzo publishes a bi-monthly journal "Mangimi&Alimenti", which has also a newsletter and a website to improve knowledge of the feed sector at business, authorities and scientific level.

#### Key services to members

- Information of new legislation and legislation databank
- Support with authorities during official control and alert, support on all legislative requirements
- Sector statistics
- Sector contracts and employee contracts
- Trainings related to feed business and regular sector meetings

#### Relationship with stakeholder environment

- Representative before national and regional administrations
- Representative before third parties (livestock Association, food association, etc.)
- Member of Federalimentare, the Italian Food Federation and Confindustria, the Italian Industry Confederation
- Member of "Food for thought"



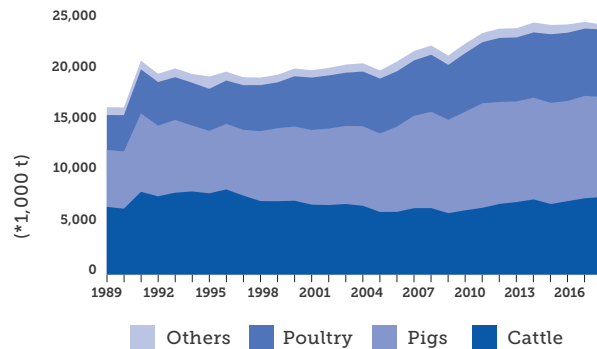
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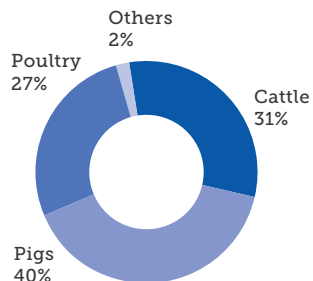




Evolution of national industrial compound feed production



National industrial compound feed production by animal category



### DVT (Germany)

**Year of Foundation** 1918

**Number of members** 280

**Type of membership** Compound feed manufacturers, premixers, mineral feed, feed additives for livestock and pets

### Key priorities

The DVT focuses on the co-operation and strengthening of mutual trust among all stakeholders within the feed value chain in order to create a healthy and stable market environment. Moreover, the DVT promotes sustainable and safe supply chains as well as the enhancement of feed efficiency in animal nutrition.

### Key services to members

- Representation of interests on a political level
- Legal advice
- Information services and public relations

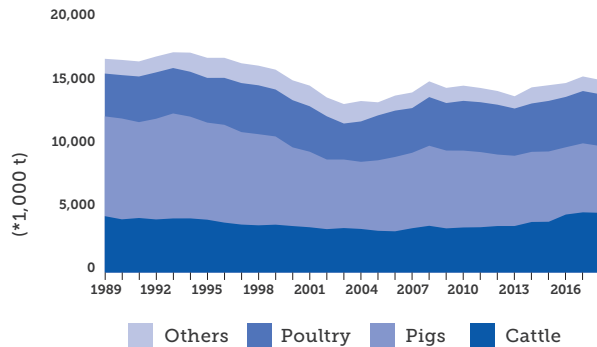
### Relationship with stakeholder environment

- Forum for more Sustainable Protein Feed
- QS – Consulting Committee (Food and Feed Safety Quality Management System)
- National Standard Commission

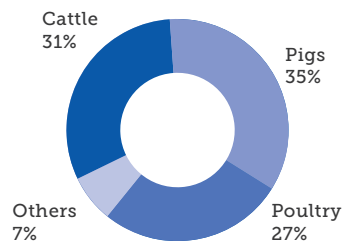




Evolution of national industrial compound feed production



National industrial compound feed production by animal category



### Nevedi (The Netherlands)

**Year of Foundation** 2000

**Number of members** 90

**Type of membership** Manufacturers of compound feed, premixes and additives, milk replacers, moist co-products etc.

### Key priorities

- Enable members to exercise their business operations optimally and adapt changing requirements and circumstances.
- Ensuring cohesion in the Dutch animal production chains.
- Formulating, representing and defending the collective interests.

### Key services to members

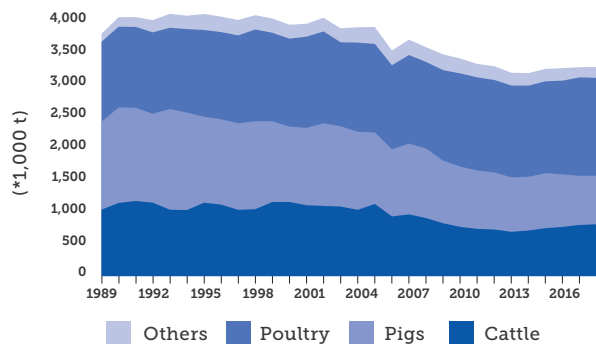
- Labour agreement and pension funds (contact unions etc.)
- Lobbying
- Policy preparation and development
- Data collection and monitoring
- Advising and informing companies on developments as sustainable renewal, reduction on food waste and circular economy

### Relationship with stakeholder environment

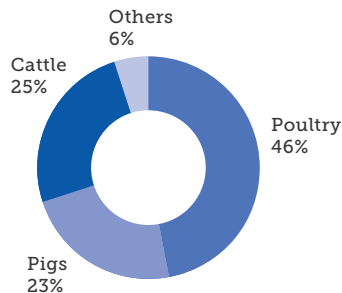
- Farmers Unions
- GMP+ International/ SecureFeed (feed safety)
- Processing industry (meat, eggs etc.)
- Government
- Non-Governmental Organisations (NGOs)



Evolution of national industrial compound feed production



National industrial compound feed production by animal category



### IACA (Portugal)

**Year of Foundation** 1969

**Number of members** 58

**Type of membership** 43 members are manufactures of feeding stuffs with 53 manufacturing units, 10 are pre-mixtures producers and 5 are feed additives companies.

### Key priorities

Our key priorities are improving efficient use of resources, animal health and welfare, competitiveness and sustainability of the Feed and Livestock Sectors. We have a long history of cooperation, synergies and projects in different areas, e.g. raw materials quality control (QUALIACA), circular economy (GOEfluentes), animal health (Mais Coelho) and antibiotic use decrease (One Health).

### Key services to members

- Provision of information, legal counselling and technical support and training to our associates
- Representation of the Industry to national and foreign bodies, and the general public (e.g. collective employment agreement negotiations)
- Promotion, in collaboration with national research institutes and universities, of scientific studies of interest to the development of the Industry (InovFeed, SANFEED, Mais Coelho, RNC 2050, GOEfluentes, PefMed)
- Dissemination of relevant information to and from the sector in our periodic publications (Informação Semanal; Revista Alimentação Animal; Anuário IACA)
- Elaboration and publication of technical manuals in collaboration with the national authorities (Code of Good Manufacturing Practices for Pre-Mixtures and Animal Feed)

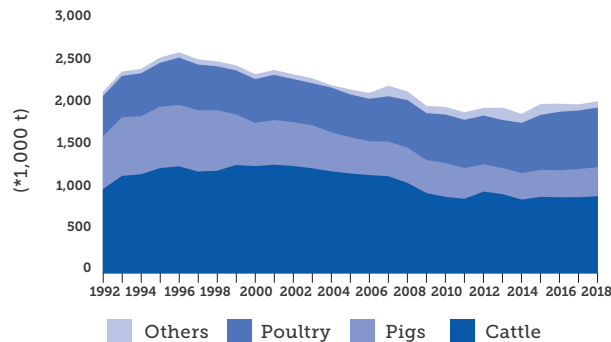
### Relationship with stakeholder environment

- Ministry of Agriculture, INIAV, DGAV and GPP
- FIPA and FoodDrinkEurope Committees
- IPQ – ONS and CT 37
- CiB – Biotecnology Information Center
- Associação Bolsa do Bovino (Cattle Market Value Association)

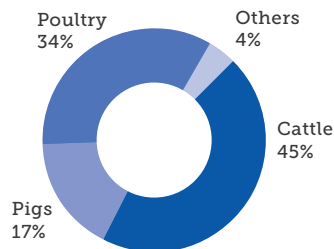




Evolution of national industrial compound feed production



National industrial compound feed production by animal category



## FS (Sweden)

**Year of Foundation** 1911

**Number of members** 45

**Type of membership** Föreningen Foder och Spannmål (Swedish Feed and Grain Association) is an organisation with member companies producing and selling agricultural supplies such as grain, feed, seeds, fertilisers and agrochemicals.

### Key priorities

- To represent and promote views and interests of the members in Swedish and EU institutions and to support members with relevant information
- To promote and facilitate the development of a responsible sound and sustainable innovative industry for both members and stakeholder within the food producing value chain
- Implement and stimulate projects involving a better Swedish feed industry, economically, environmentally and as part of best practice in the whole food chain

### Key services to members

- Act as referral organisation towards national and EU authorities regarding our industry's issues
- Affect and initiate questions to the policy making process and other stakeholders, regarding the member companies and the whole industries future development
- Initiate and coordinate different projects and develop recommendations and rules and good manufacturing practices that ensure the quality, safety and sustainability of compound feed and premix

### Relationship with stakeholder environment

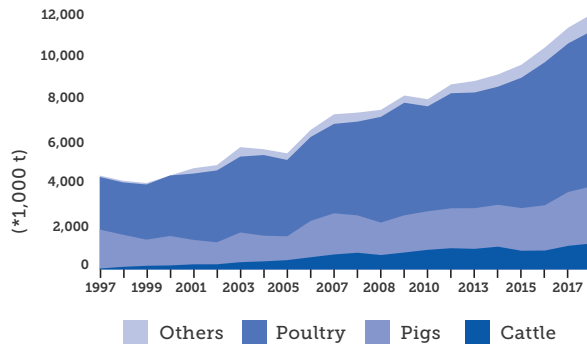
Foder & Spannmål interact on national level with both the Federation of Swedish Farmers – LRF and other national farmers producer organizations such as SpmO (Grain Growers Ass.), SFO (Oilseed growers Ass).

F&S relate to other mainly national organizations as Swedish Egg, Swedish Meat producing Companies.

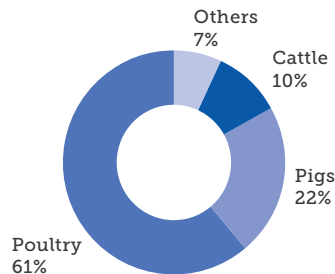
On research and Development F&S act closely within the different foundations, Universities and institutes and academies for applied research with the whole value chain of Feed and Food. For example SLF, SLU, RISE, KSLA, Swedish Food Arena.



Evolution of national industrial compound feed production



National industrial compound feed production by animal category



### Izba Zbozowo-Paszowa (Poland)

**Year of Foundation** 1997

**Number of members** 60+

**Type of membership** Feed production, oilseed crushing industry, milling and storage and the national and international trade of grain and oilseeds. Among our members there are also companies providing services for the agricultural sector, such as investments, transport or quality control

#### Key priorities

Our mission is to create a platform – an organizational form for internal structural partnership of companies from the feed, milling, grain and oilseeds trade sectors in their key economic aspects as well as to influence the national and EU governmental administration.

#### Key services to members

- Influencing the administration (national and EU), opinion-forming centres and media in order to ensure protection and maximum level
- Creating favourable conditions for the development of IZBA members using national and international information and data, along with propagation of scientific, organisational and technical innovations
- Impact on forming and amending sector-specific legal regulations and requirements
- Formulating rules of ethics in operations of IZBA members

#### Relationship with stakeholder environment

- We represent our members before public administration and third parties
- On the national level we closely cooperate with other branch organizations representing poultry, swine and cattle producers as well as meat, milk, eggs and oil sectors
- On an international arena we are members of such organizations as COCERAL (grain and oilseeds trade companies) and FEFAC (feed manufacturers) with their head offices in Brussels, where our representatives serve in committees of both organizations
- We are also a member of European Commodities Exchange
- We are the national coordinator of ProRapeSeed Polish-German scientific project on "Innovative processing technology of rapeseed products for poultry nutrition"



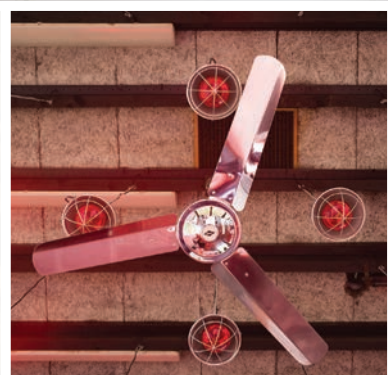
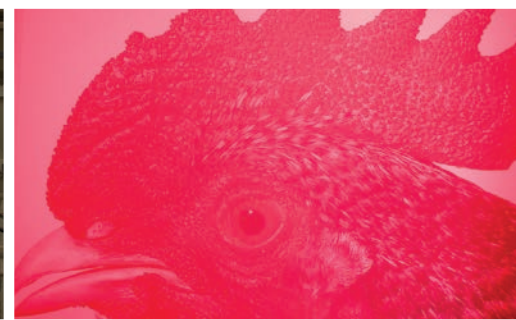


de heus



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### **What is the biggest achievement of 60 years FEFAC as the European Feed Manufacturers Association?**

FEFAC is a great achievement in itself, as an organization. FEFAC has grown with the expansion of the EU, and even beyond. It has become THE European feed partner for the EU institutions and the food chain partners, something to be extremely proud of. FEFAC has been so successful because it stuck to its model of being a federation of national associations, which requires a combination of bold vision and the finest diplomacy. More recently, the decision to introduce sustainability as the third pillar of FEFAC's Vision has greatly enhanced the federation's standing. The elaboration of the Soy Sourcing Guidelines and of a harmonized carbon footprint database and methodology are immense steps forward.

### **What is the biggest challenge for our sector?**

The biggest challenge, or possibly threat, for the European compound feed industry in the decade ahead is undoubtedly the strong undercurrent against the consumption of animal proteins. A very vocal minority has managed to spread this negative opinion, which has come to dominate the public debate and is omnipresent on social and other media.

### **What breakthrough progress can animal nutrition science still make on the way to 2030?**

One of the goals we set for our animal nutritionists from now to 2030 focuses on the further reduction of the use of (imported) soy in broiler feed, as we have reached already extremely low soy levels for the other species. Another goal is to enrich and rebalance our feed to improve gut health and so further reduce the use of antibiotics and improve general health in the animal population.

### **What is your opinion on cooperation between public and private safety management in Belgium?**

It has been exemplary. There is a constant dialogue between our Belgian food safety agency FAVV and BFA, the Belgian Feed Association, who have developed a comprehensive sampling plan. The results of the private sector monitoring plan are exchanged with the FAVV's own findings. At the same time, our company is hugely investing in trying to neutralize the presence of hazardous substances, in particular the risk of salmonella. To that end we are developing process technologies and animal nutrition insights that will be put in place in the year to come. We have also mapped suppliers on a risk/production unit basis.

### **What steps will supply chain risk management need to make in the road to 2030 to come to support optimal control of feed safety based on "top of the pyramid" principle?**

One of the challenges ahead is the fact that, with lab detection limits becoming ever lower, one will end up finding unwanted substances in all raw materials, be it of a rarefied salmonella strain or of pesticides that are prohibited in the EU. This problem will call for a pragmatic understanding between private and public sector and the definition of "a technical solution" for the zero presence of a great number of substances. In general, our suppliers will have to make a greater effort

to control their products, based on the top of pyramid principle. While their attitude has improved, the terms of trade embedded in the GAFTA and other standard contracts do not take into account the new risks we face. The burden is still on the feed industry.

### **What will "feed sustainability" look like in 2030 in your company?**

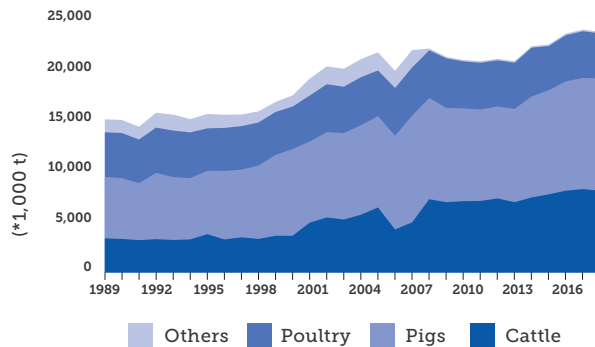
In an ideal world, to be fully sustainable the feed our company would produce in 2030 should only contain raw materials that are locally produced and are unfit for human consumption. And at the same time the technical performance indicators such as feed conversion ratio, growth and animal welfare should be on a higher level than today. The work on sustainability undoubtedly creates new challenges but also huge opportunities for our European companies.



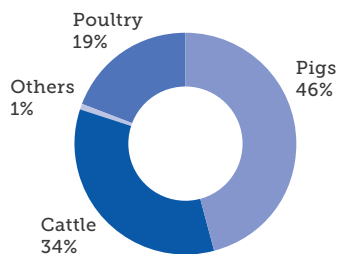
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Thomas Vanden Avenue




Evolution of national industrial compound feed production



National industrial compound feed production by animal category



### CESFAC (Spain)

**Year of Foundation** 1978

**Number of members** 223

**Type of membership** Cesfac is the non-profit professional organization that represents the interests of the Spanish compound feed industry (feed, premix and feed supplement to National and International bodies and third parties. The 15 regional associations within Cesfac assure adequate sector representation to regional public bodies. The Confederation is the only representative of the Spanish compound feed production to the European Feed Manufacturers Federation (FEFAC), to the Spanish Food & Drink Industry Federation (FIAB) and to the Spanish Interprofessional Organisation of Animal Feed.

### Key priorities

Cesfac brings together the interests of operators in the animal feed chain, feed manufacturers and livestock producers. Its activity involves an effective improvement and competitiveness of the Spanish meat sector as well as the opening of new markets. That is why we pay special attention to quality and food safety.

### Key services to members

- Help manufacturers to deal with the changing challenges of the industry
- Guarantee the quality of the products through the Guarantee Mark, a unique reference in the feed manufacturing industry in Spain
- Offer the possibility of having the maximum control and traceability of raw materials. For example, through the E-Pienso Operating Group. A technological platform to share all the information related to: raw materials, suppliers, analysis, laboratories, etc.
- Awareness and support in applying an efficient use of antibiotics. Through the organization of courses, conferences, etc.
- Be part of a production system based on the Circular Economy

### Relationship with stakeholder environment

- Representative before public administrations and third parties
- Representative before each regional administration
- Representative before FIAB, the Spanish Food and Drink Industry Federation
- Representative before INTERAL, the Spanish Interbranch Organisation of Animal Nutrition

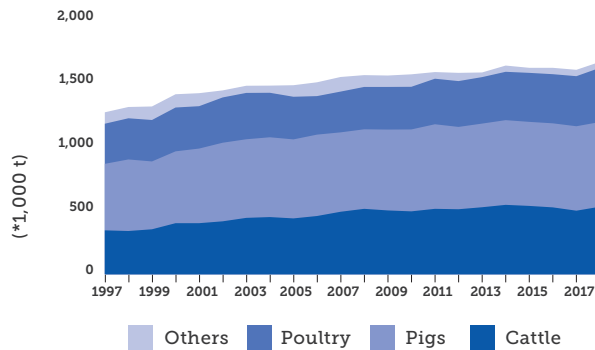




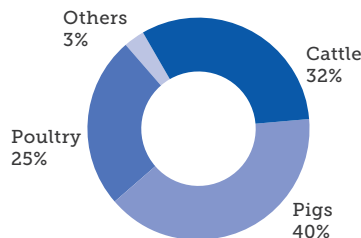
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Evolution of national industrial compound feed production



National industrial compound feed production by animal category



**VSF (Switzerland)**

**Year of Foundation** 1933

**Number of members** 74

**Thereof:**

Premix	4
Compound feed	36
Feed additives	8
Other	26

**Type of membership** VSF is an independent association that represents the interests of the Swiss compound feed industry towards authorities and the public. The VSF commits for independent and producing Swiss agriculture, for open markets and for sustainable and competitive animal production.

**Key priorities**

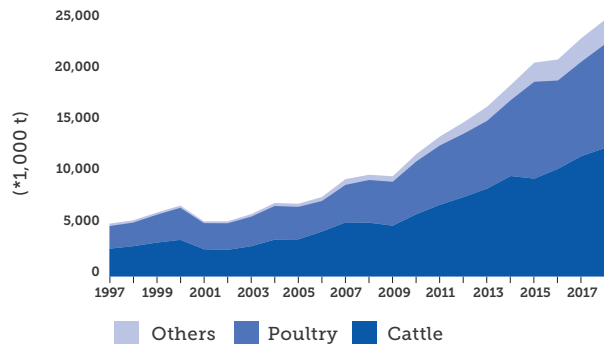
- Comprehensive information of the members about industry topics and questions from the economy, politics and science
- Opinion on legislative decrees and regulations
- Represent the industry to the authorities, the public and other bodies at national and international level
- Combating unfair competition
- Development of branch solutions in the area of work safety and quality standards, as well as in other areas

**Key services to members**

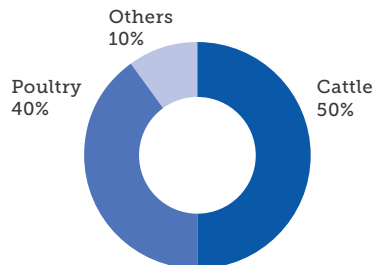
- Information of the members about industry topics and questions from the economy, politics and science
- Support in application of Swiss Feed Production Standard, SFPS
- Relationship with stakeholder environment
- Representative towards public administrations and third parties
- Representative towards swiss granum, Swiss industry organization cereals, oilseeds and protein crops
- Member of Soy network Switzerland
- Associate Member of FEFAC, the European Feed Manufacturers' Federation



Evolution of national industrial compound feed production



National industrial compound feed production by animal category



### TURKIYEM-BIR (Turkey)

**Year of Foundation** 1974

**Number of members** 160

**Type of membership** Compound feed manufacturers

### Key priorities

- Promoting sustainable feed production based on science and technology for a more competitive feed industry
- Efficient and responsible use of sources
- Supporting livestock production to provide healthy, nutritious and affordable protein for people

### Key services to members

- To support our members in terms of technical, social, economic, occupational issues
- To support the agricultural production to be effective and beneficial for public
- To help feed industry to develop in an efficient manner for the sake of public interest
- To inform competent bodies and provide solutions regarding problems of feed sector

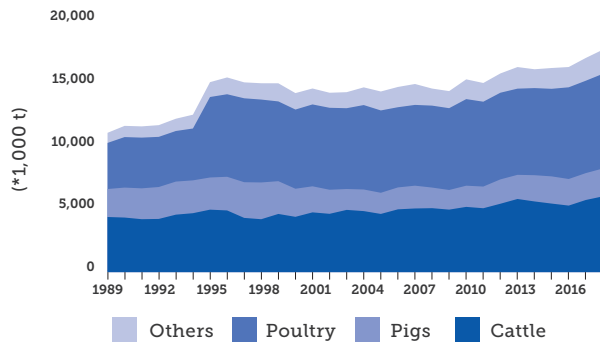
### Relationship with stakeholder environment

- Close cooperation with Ministry of Agriculture and Forestry and Associations related feed industry

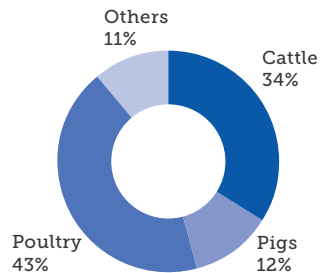




Evolution of national industrial compound feed production



National industrial compound feed production by animal category



**AIC (United Kingdom)**

**Year of Foundation:** 1945

**Number of members** 240 Full and Associate Member companies

**Type of membership** Compound feed manufacturers, premixture and mineral feed suppliers, raw material suppliers, shippers and traders, former food product processors.

**Key priorities**

**Feed safety management**

- Whole chain approach
- Robust assurance schemes
- Liaison with industry and control authorities

**Animal Nutrition**

- Increase nutrient efficiency
- Role of nutrition in maintaining health and reducing need for antibiotics
- Improving the quality and nutritional value of food products

**Sustainability**

- Encouraging responsible sourcing
- Professional on-farm advice to help reduce emissions

**Key services to members**

- Lobbying and representation
- Shaping policy at the highest level
- Delivering information
- Providing trade assurance schemes
- Training and technical support

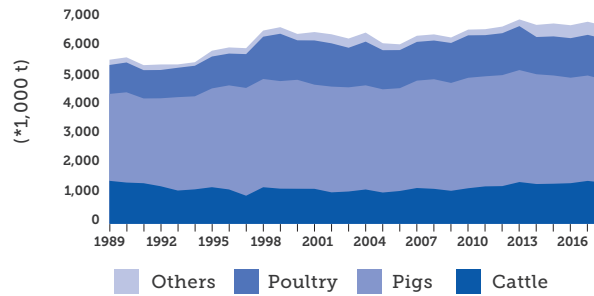
**Relationship with stakeholder environment**

- Well developed relationships with Government and control authorities
- Key partner with other industry representative bodies
- Trusted across the entire food supply chain
- Recognised and respected by NGOs

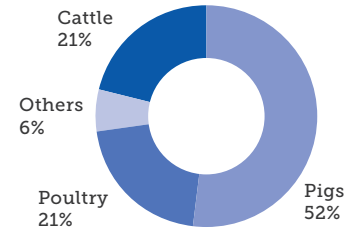
**BFA (Belgium)**  
**Year of Foundation** 1944  
**Number of members** 124



Evolution of national industrial compound feed production



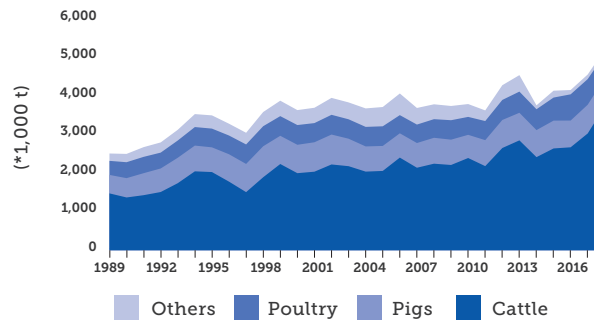
National industrial compound feed production by animal category



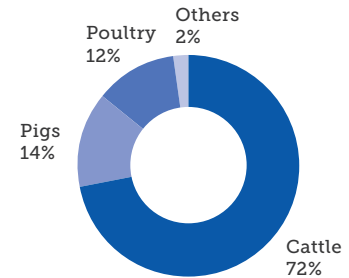
**IGFA (Ireland)**  
**Year of Foundation** 1988  
**Number of members** 59



Evolution of national industrial compound feed production



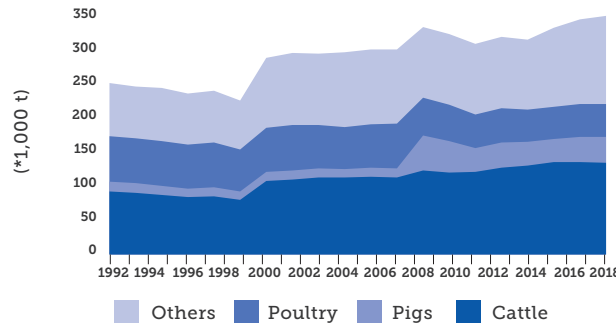
National industrial compound feed production by animal category



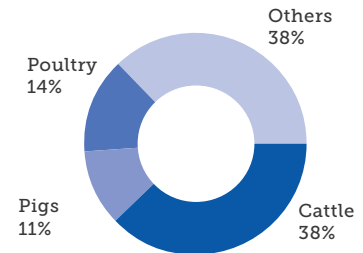
**CAFM (Cyprus)**  
**Year of Foundation** 1998  
**Number of members** 24



Evolution of national industrial compound feed production



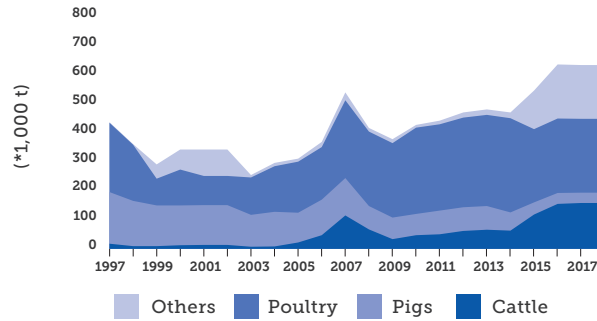
National industrial compound feed production by animal category



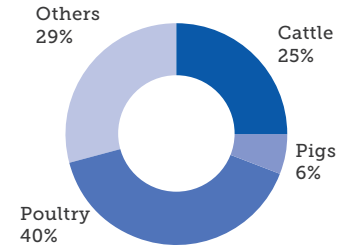
**LGPA (Lithuania)**  
**Year of Foundation** 1992  
**Number of members** 35



Evolution of national industrial compound feed production



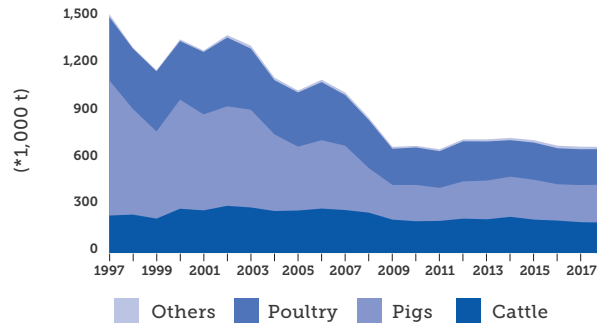
National industrial compound feed production by animal category



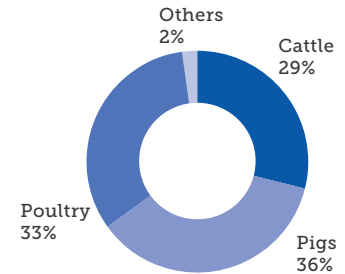
**AFPWTC (Slovakia)**  
**Year of Foundation** 1998  
**Number of members** 36



Evolution of national industrial compound feed production



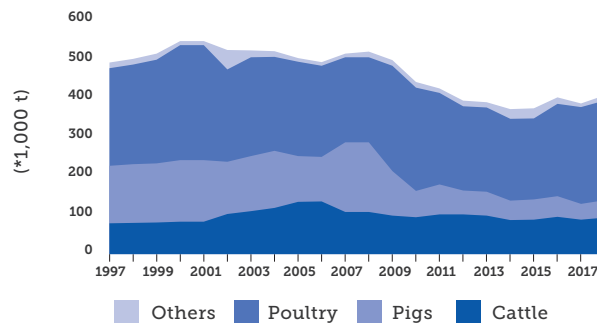
National industrial compound feed production by animal category



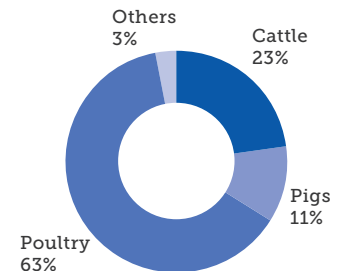
**CCIS-CAFÉ (Slovenia)**  
**Year of Foundation** 1997  
**Number of members** 8



Evolution of national industrial compound feed production



National industrial compound feed production by animal category





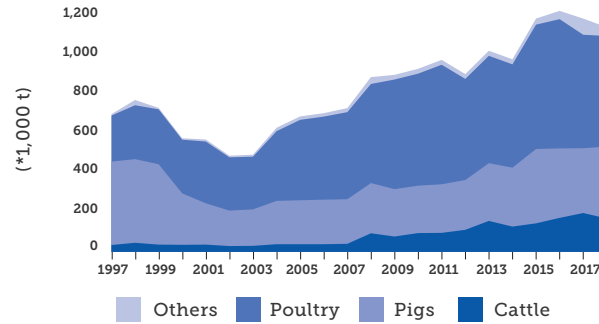
**BFMA (Bulgaria)**

**Year of Foundation** 1993

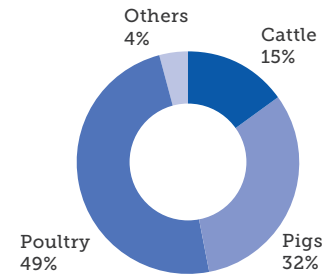
**Number of members** 69



*Evolution of national industrial compound feed production*



*National industrial compound feed production by animal category*



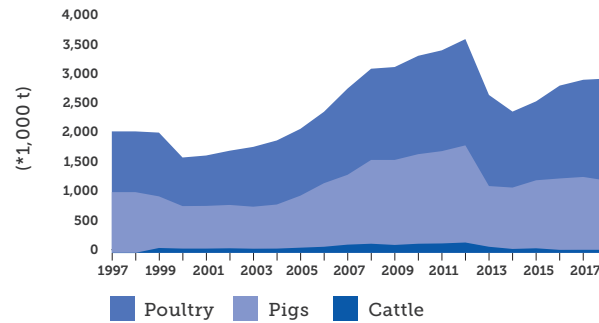
**ANFNC (Romania)**

**Year of Foundation** 2013

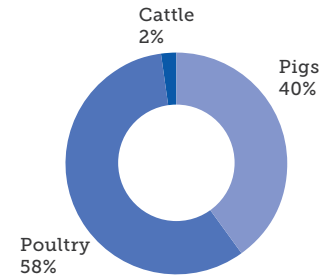
**Number of members** 50



*Evolution of national industrial compound feed production*



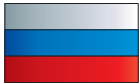
*National industrial compound feed production by animal category*



**RUFM (Russia)**

**Year of Foundation** 2002

**Number of members** 73



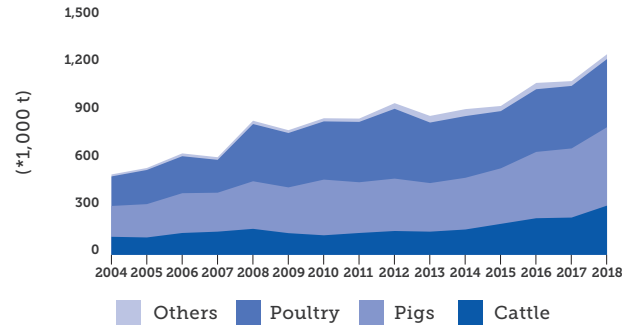
**SFMA (Serbia)**

**Year of Foundation** 2004

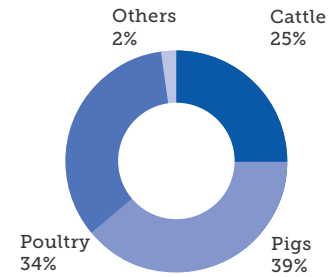
**Number of members** 299



Evolution of national industrial compound feed production



National industrial compound feed production by animal category



**NSF - Norwegian sea food federation (Norway)**

**Year of Foundation** 1991

**Number of members** 517



**SjømatNorge**

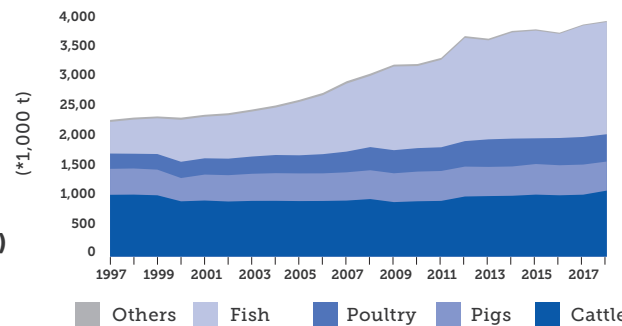
**FKF AS - Felleskopjet (Norway)**

**Year of Foundation** 1992

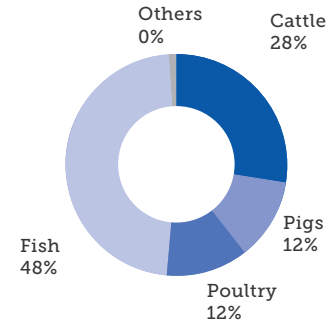
**Number of Members** 3



Evolution of national industrial compound feed production

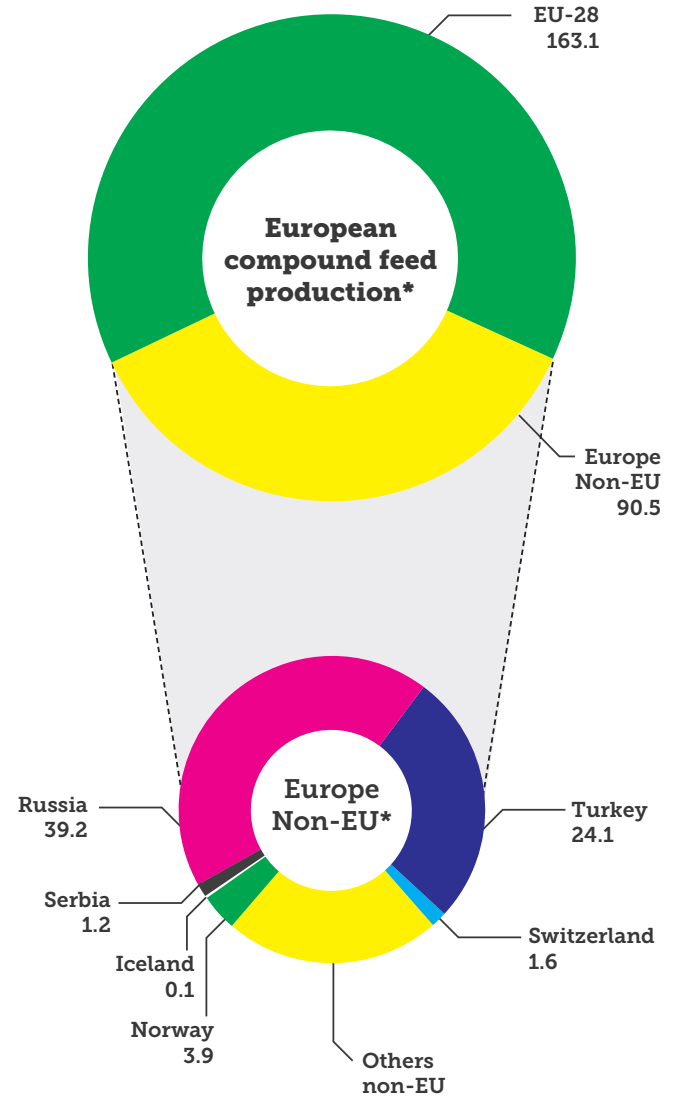
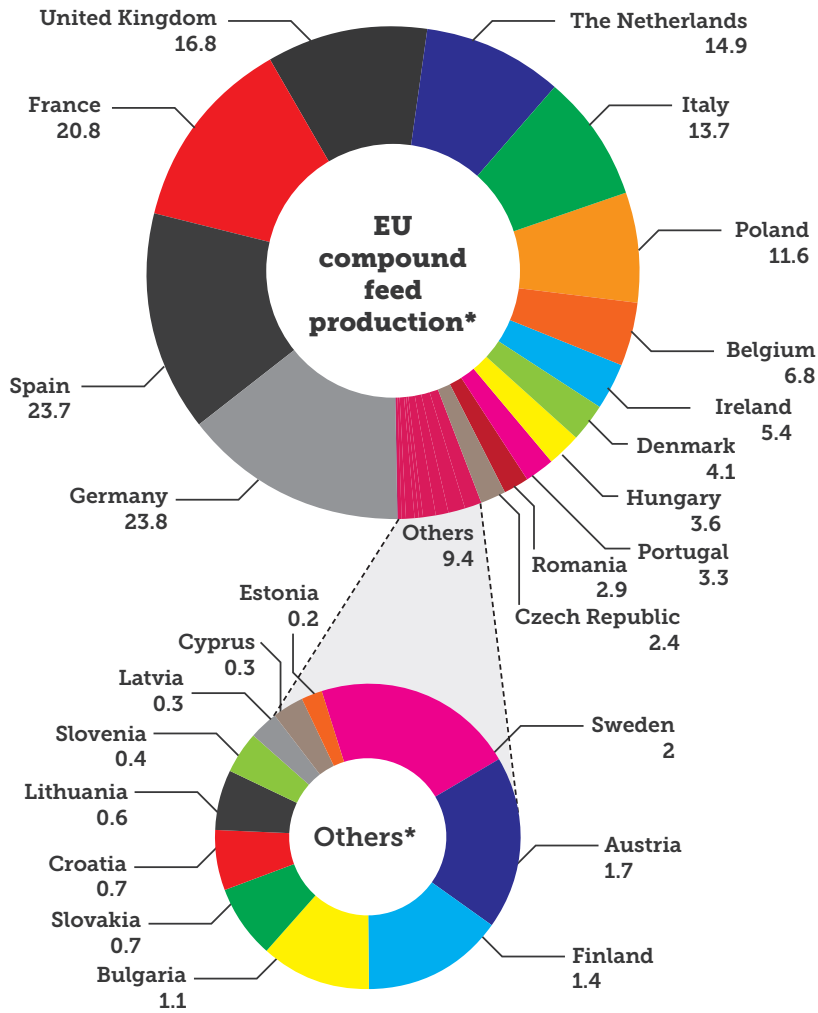


National industrial compound feed production by animal category



**Norkorn (Norway)**





\*Production in million tonnes of industrially produced compound feed



**Active Members**

VFÖ	Austria	1995 (1964)
BFA	Belgium	1959
BFMA	Bulgaria	2013
CFIA	Croatia	2013 (2008)
CAFM	Cyprus	2004 (2003)
SKK	Czech Republic	2004 (2000)
DAKOFO	Denmark	1973
FFDIF	Finland	1995 (1993)
EUROFAC*	France	1959
DVT	Germany	1959
HGFA	Hungary	2012
IGFA	Ireland	1973
ASSALZOO	Italy	1559
LGPA	Lithuania	2005
NEVEDI	The Netherlands	1959
IZP	Poland	2004 (2001)
IACA	Portugal	1986 (1971)
ANFNC	Romania	2014
AFPWTC	Slovakia	2004 (2003)
GZS	Slovenia	2004
CESFAC	Spain	1986
FS	Sweden	1995
AIC	United Kingdom	1973

\*EUROFAC took over from SNIA in 2016

(Observer as from...)

**Observer Members**

RUFM	Russia	2010
SFMA	Serbia	2009

**Associate Members**

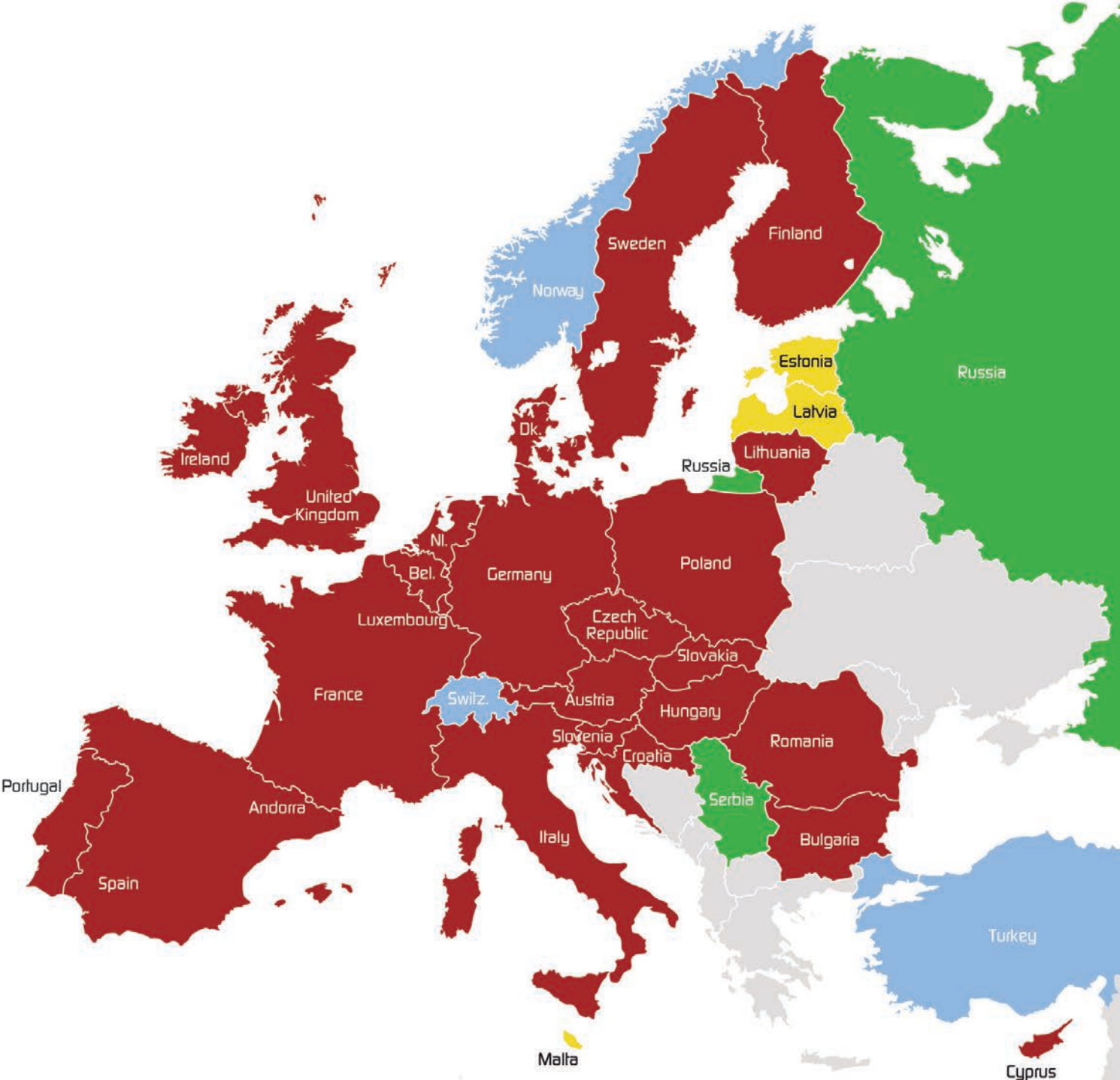
EFFPA		2014
EMFEMA		2003
NSF	Norway	2003
FKF AS	Norway	2014
Norkorn	Norway	2014
VSF	Switzerland	1966
TURKIYEM	Turkey	2014 (2005)

(Observer as from...)

**Potential Active Members**

Estonia
Latvia
Malta

Situation on 1 January 2018



**"HALL OF FAME"****FEFAC Presidents**

Joseph LAGA	1959 - 1962	(BE)
Gerrit VAN NIEWENHUIZEN	1962 - 1965	(NL)
Joseph LAGA	1965 - 1967	(BE)
Maurice WEBER	1967 - 1968	(FR)
Arthur KUEHN	1968 - 1971	(DE)
Antonio FERRARI	1971 - 1973	(IT)
Oscar DEWILDE	1973 - 1975	(BE)
Ken J. ARNOTT	1975 - 1977	(IE)
Christian F.A. BOTZENHARDT	1977 - 1981	(DE)
Gerrit KINGMA	1981 - 1985	(NL)
Brian RUTHERFORD	1985 - 1989	(UK)
Francesco FERRARI	1989 - 1993	(IT)
Bernard DESRUELLE	1993 - 1996	(FR)
Pat LAKE	1996 - 2001	(UK)
Yves MONTECOT	2001 - 2004	(FR)
Martin J.M. TIELEN	2004 - 2007	(NL)
Pedro CORRÊA DE BARROS	2007 - 2010	(PT)
Patrick VANDEN AVENNE	2010 - 2013	(BE)
Ruud TIJSSENS	2013 - 2017	(NL)
Nick MAJOR	2017 - 2020	(UK)

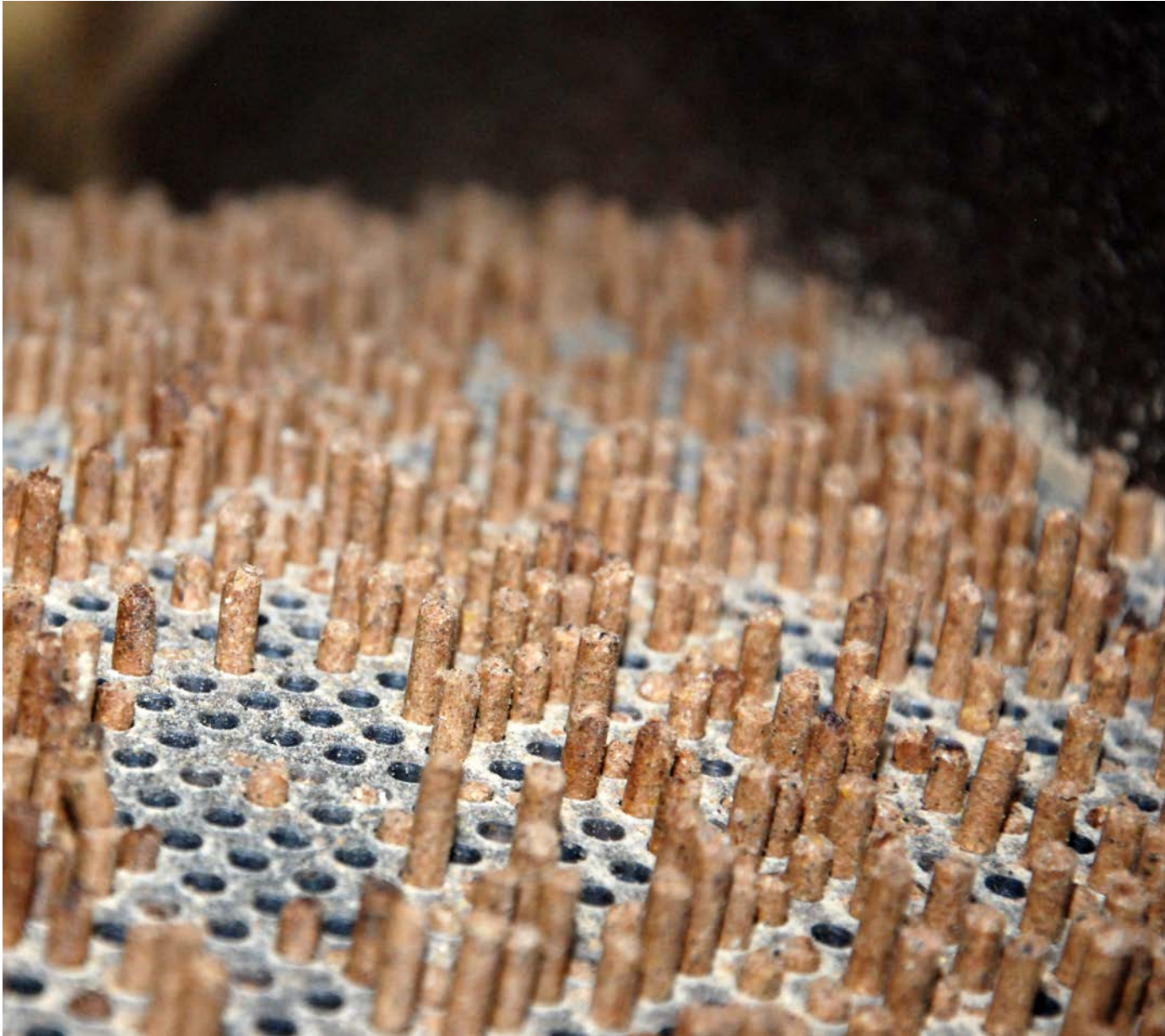
**Honorary Members**

Hubert Marek	(AT)
Marcel van Belle	(BE)
Carl Brenninkmeyer	(NL)
André Namur	(LU)
Franz-Josef Juchem	(DE)
Giordano Veronesi	(IT)
Helen Raine	(UK)
Marek Kumprecht	(CZ)
Jaime Piçarra	(PT)
Alain Guillaume	(FR)
Geert Kleinhout	(NL)
Alberto Allodi	(IT)
Joel Newman	(US)



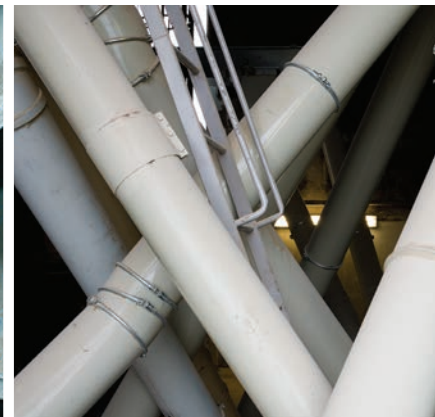
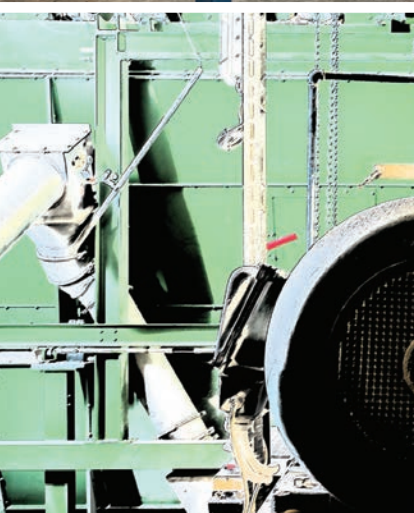
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