

Feeding the Future – Innovation and Sustainability in Animal Nutrition



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Wherever we look in the world today, we see volatility, uncertainty, complexity and ambiguity and there are few sectors of the European economy where that applies more than agriculture and particularly livestock. If agriculture is a strategic sector of the EU economy, as the European Commission has now rightly recognised, then livestock plays an extremely dynamic and catalysing role within it. And yet we stand at a crossroads in Europe when it comes to maintaining and expanding the use of innovative animal feeding strategies and technologies which play such a key role in the productivity, competitiveness and sustainability of this vital sector.

Whilst we should be excited and motivated by the opportunities ahead, we also need to be realistic about the hard questions and choices that now need to be made in Europe to maintain and unlock the future potential of this part of the agri-food industry.

Leading the World in Methionine

Over the past 90 years, ADISSEO has established itself as a leader in the research, development, production and trade of high-quality, sustainable, animal feed additives. Today, we are a multi-billion global company, headquartered in Paris, employing more than 3,000 people worldwide. Over two thirds of our people are based in Europe and more than 80% of our R&D budget is deployed in the EU. Consequently, we are well placed to share our thoughts on how we might address some of these hard questions and choices and to bring forward some of the necessary solutions.

For example, ADISSEO is the world leader in methionine – and has developed a unique expertise in formulating and producing rumen protected methionine for ruminants. This is the first limiting amino acid for dairy cows and is critical for about 70% of global dairy market.

By reducing the need for high protein-soybean meal use, methionine supplementation contributes to the lowering GHG emissions and nitrogen excretion. In dairy cows, such protected methionine maximizes milk production and increases levels of milk protein and fat, and thus supports the all-round productivity, profitability and sustainability of Europe's dairy farmers.

Supporting the EU's Dairy Industry

This is of vital importance given the EU dairy industry is a substantial contributor to the overall value and growth of the agri-food sector in Europe. This year, the dairy industry will be worth around €200bn in 2025, with over €15bn in exports, and it is expected to grow by over 4.5% by 2030.

As EU and Member State agri-environmental policies evolve (particularly with respect to reducing excessive nitrogen emissions from livestock), the productivity and competitiveness of the dairy industry will be challenged. The overall size of the EU dairy herd is likely to further reduce by 2035 (by approximately 11% compared with the 2022-2024 average). In which case, better feeding strategies, including the use of methionine supplementation, will be essential to support the long-term productivity, profitability and sustainability of the EU dairy industry if it is to meet the strong demand for dairy products from both EU consumers and international markets.

Given the current global uncertainties, the animal nutrition sector needs the EU to support its competitiveness and innovation so that companies like ADISSEO continue and expand its investments here.

In recent years, EU dependency on imports of critically important feed additives, especially vitamins and amino acids has become acute placing us in a vulnerable position given the strains being put on supply chains arising from current geopolitical tensions.

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Delivering on the Vision for Agriculture

With all that in mind, the question is what do we need to do to deliver on the commitments, including for livestock, made in the Commission's Vision for the Future of Agriculture in Europe?

Well, we certainly need to work together to address the energy and raw material costs faced by EU operators which are 2-3 times higher than in any other part of the world.

But in addition to this, we need an enabling legislative framework for animal nutrition solutions that stimulates investment and production in Europe, particularly for feed additives:

- Like many others, we face disproportionate time and resource intensive authorisation procedures which create obstacles to bringing new nutritional solutions to the EU market. This discourages industry to select Europe as the first market to be served with innovations, as it undermines profitability, thus diminishing the EU's attractiveness for investment in capacity building in R&D and production in the EU.
- On top of this hurdle, the regulatory obstacles and unpredictability faced in the production and movement of safe animal nutrition solutions for export to third countries, even if they are not yet authorised in the EU, also constrain EU industrial production of these valuable solutions. This regulatory constraint on exports further undermines the attractiveness of Europe as a destination for investment in R&D and production facilities.

For all these reasons, we welcomed the Commission's Vision for the Future of Agriculture in Europe. We were very encouraged to see the emphasis placed on continued access to technology and innovation, particularly for animal nutrition, and especially where it improves the health and well-being of livestock; the productivity and quality of the produce; the efficiency and profitability of the farm; and offers a critical path to reducing livestock emissions and delivering improved environmental outcomes.

Given our own role in this area, we look forward to contributing to the Commission's workstream on the future of the livestock sector. It is critical that we accurately diagnose the sector's challenges, including global competition; address the climate and environmental footprint of the sector, and foster investment in technology and enhance the development of sustainable business models, which include advanced, state-of-the-art feeding strategies.

If we address this in the right way, and the regulatory simplification being ushered in by the Omnibus process is a positive first step, then we could still see the continued growth, vitality and competitiveness, of the EU agri-food and dairy sectors whilst ensuring food and industrial sovereignty and the achievement of our environmental and climate goals.

But the time to act is now and time is short to do the right thing if we are to feed the future with innovative, sustainable animal nutrition solutions.

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