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June 2024

FINAL PRODUCTION DEHYDRATED FORAGES 2023

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PRODUCTON DEHYDRATED FORAGES 2023

Country	INITIAL STOCK	PRODUCTION		
		ALFALFA	GRASSES	TOTAL PRODUCTION
Germany	-	31.203	152.347	**183.550**
Spain	40.000	785.000	195.000	**980.000**
France	5.000	820.000	5.000	**825.000**
Netherlands	5.000	58.000	15.000	**73.000**
Italy	294.200	696.040	272.030	**968.070**
Denmark	-	3.000	12.000	**15.000**
Bulgaria	1.000	18.000	12.000	**30.000**
TOTAL CIDE	**345.200**	**2.411.243**	**663.377**	**3.074.620**

LAST 10 YEARS EVOLUTION

EVOLUTION EUROPEAN PRODUCTION (Last 10 years) *1000										
COUNTRY	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
France	720	810	711	740	867	759	780	650	775	825
Germany	199	244	150	195	221	192	222	215	167	183
Italy	585	716	700	790	710	810	790	990	950	968
Denmark	20	20	20	20	20	20	20	20	14	15
Netherlands	90	108	100	116	130	120	123	98	75	73
Spain	1.650	1.469	1.450	1.392	1.450	1.352	1.411	1.425	1.263	980
UK	42	38	35	38	31	33				
Bulgaria									30	30
TOTAL	**3.306**	**3.405**	**3.166**	**3.291**	**3.429**	**3.286**	**3.346**	**3.398**	**3.274**	**3.074**

COMMENTS ABOUT THE MARKET & SALES

SALES AND MARKET

- ✓Transformation costs, although they have fallen, are still high, which is a problem for the sector.(Gas and electricity)
- ✓Sales prices have dropped significantly compared to last two years.
- ✓After three years disrupted by Covid-19 and then geopolitical conditions and difficulties generated in the energy markets, there was strong hope of returning to calmer operating conditions.
- ✓Fodder demand has been lower than usual, especially in international markets.

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COMPSUPTION & SALES DEHYDRATED FORAGES 2023					
Country	CONSUMPTION & SALES				
	TOTAL FOR COMSUMPTION	AUTOCOMPSUPTION	TO SALE	SOLD	FINAL STOCK (tons)
Germany	183.550	150.000	33.550	183.550	-
Spain	1.026.000		1.026.000	796.000	230.000
France	830.000	15.000	815.000	700.000	115.000
Netherlands	78.000	13.000	65.000	60.000	5.000
Italy	1.262.270		1.262.270	900.000	362.270
Denmark	15.000	15.000		15.000	
Bulgaria	31.000	-	31.000	29.000	2.000
TOTAL CIDE	**3.425.820**	**193.000**	**3.232.820**	**2.683.550**	**714.270**

ESTIMATION PRODUCTION 2024

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ESTIMATION PRODUCTON DEHYDRATED FORAGES 2024

Country	INITIAL STOCK	PRODUCTION ESTIMATION		
		ALFALFA	GRASSES	TOTAL PRODUCTION
Germany	-	50.000	190.000	**240.000**
Spain	230.000	1.000.000	250.000	**1.250.000**
France	115.000	800.000	5.000	**805.000**
Netherlands	5.000	60.000	15.000	**75.000**
Italy	362.270	700.000	300.000	**1.000.000**
Denmark		15.000	-	**15.000**
Bulgaria	500	12.000	6.000	**18.000**
TOTAL CIDE	**712.770**	**2.637.000**	**766.000**	**3.403.000**

PRODUCTION FORECAST 2024

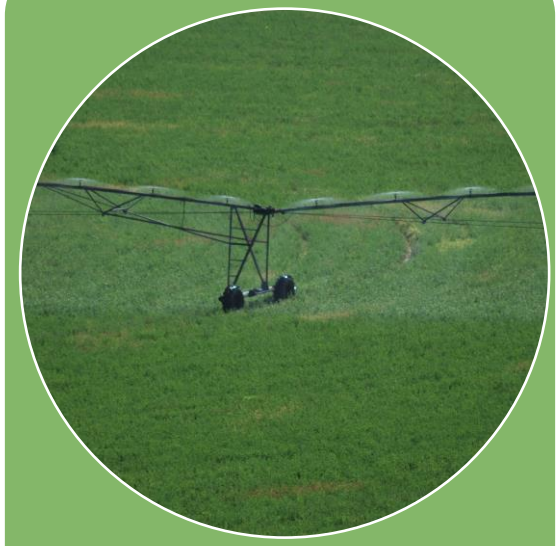
- Our estimation it´s the production could be 10 % more than the last campaign.
- The production could be than 3.400.000 Tons, (+300.000 mt)
- Production will recover significantly, especially driven by the increase of the production in Spain, which last year was severely affected by the drought.
- High stock levels in the main producing countries (Italy, Spain and France).

RELEVANCE SECTOR

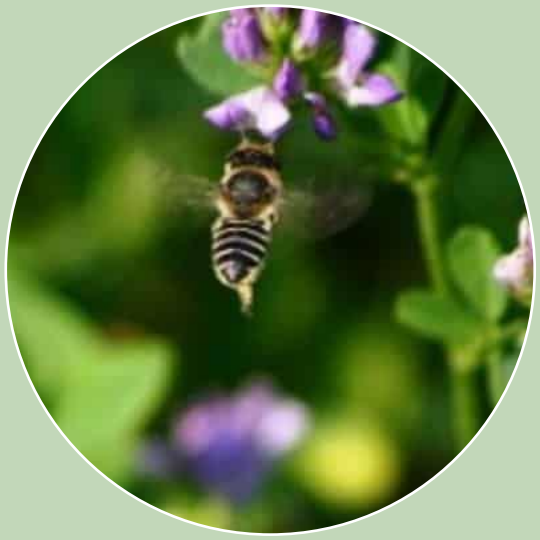
RELEVANCE SECTOR

DEHYDRATES SECTOR FIGURES 2023					
COUNTRY	Number of Plants	Number of Hectares	Organic Production	Workers	Average Protein Range
Germany	34	50.000	38.545	500	18%
Spain	58	96.000	10.000	4.000	19%
France	24	67.000	20.000	1.000	18%
Netherlands	5	12.500	15.000	145	17%
Bulgaria	1	1.600	0	65	18%
Italy	30	80.000	50.000	13.500	18%
Denmark	1	2.000	2.000	30	20%
TOTAL	**153**	**309.100**	**135.545**	**19.240**	**18,2%**

Alfalfa contributes to improving biodiversity with 117 species of birds using it for food, shelter or reproduction



It does not need nitrogen fertilizers, thus avoiding water being contaminated by nitrates



Bees conservation: More than 60 species of bees pollinate alfalfa

Alfalfa doesn´t need fertilizers and chemical treatment at all, perfect crop for organic production

European Forage Enviroment

European Forage CO2 sequestration

It fixes 9 t/ha/year of CO2 (1.5 t in the parts that are underground, 0.75 t in its roots and 6.75 t in the parts that are above ground), thus helping to alleviate the greenhouse effect and acting as a green filter.

Accounting of carbon emissions and sequester in the forage production process. Helping to mitigate the Carbon footprint.

Forage crops does not require herbicides and phytosanitary products do not need to be extensively used.

The binomial of alfalfa cultivation and dehydration industry as a fundamental vector in mitigating climate change.

European Forage, food safety and animal welfare

The Europen Forages producers through a highly technological process sanitize, stabilize and extract the foreign bodies present in the raw materials.

Quality analysis of all production batches is carried out regularly as required by **European HACCP regulations.**

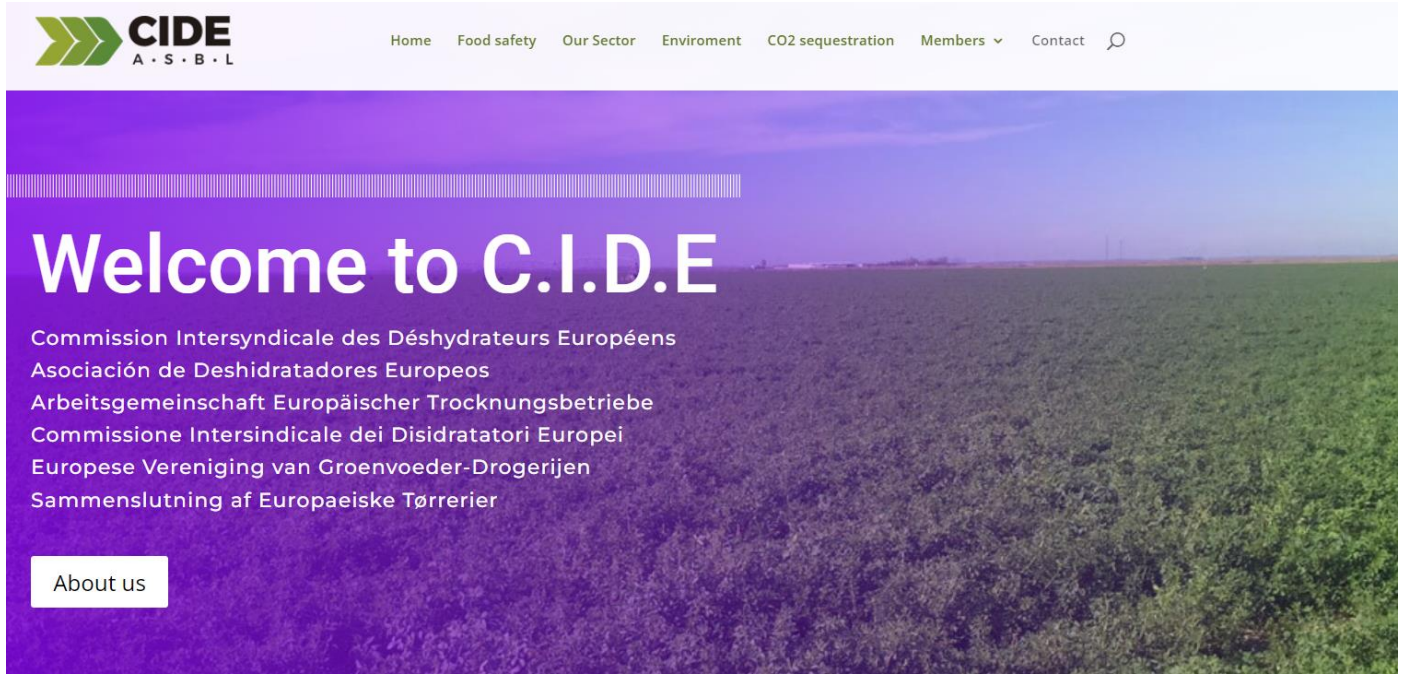
Dehydrated European Forages are characterized by high stability and very low humidity levels, which guarantee the health of the product and prevent the appearance of mycotoxins, molds, live insects, and any substance that can harm the animal welfare.

The seed used for sowing in all European countries is NO GMO.

FOR MORE INFORMATION

WEB SITE

- www.europeanforage.eu



SOCIAL MEDIA

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