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The EU livestock sector

Accompanying the document

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

EU strategy on livestock

{COM(2026) 576 final}

TABLE OF CONTENTS

INTRODUCTION

In its Vision for the future of Agriculture and Food (the Vision) ([1]) the Commission considered that, in 2040, the European Union "*must be a place where farming and food production thrive across our continent in all their diversity. A place where farming is attractive for future generations, and the agri-food sector is competitive, resilient, future-proof and fair*". It recognized livestock as an essential part of the EU agricultural sector and the food value chain, competitiveness and cohesion, and that sustainable livestock is crucial for the EU's economy, rural viability, landscape and environmental preservation. The livestock sector is a vital part of the European Union's agricultural framework, encompassing a diverse range of activities and supporting rural economies.

Livestock production in the EU is diverse, ranging from indoor systems intensive in inputs such as fertilizers, feed, machinery, and advanced technology, to extensive farming involving cultivating larger land areas with lower inputs and reliance on natural resources. Each system carries unique challenges as well as opportunities. As the sector navigates these challenges, the Commission's Communication on a Union Livestock Strategy (the Strategy) intends to lay down a path for a sustainable future for the sector offering solutions tailored to the variety of livestock production methods across Europe considering regional differences and practices. and emphasizing that different territories may follow differentiated pathways, in line with their own economic, social and environmental situations.

A comprehensive approach that embraces the diversity of the EU livestock farming as well as of its territories acknowledges that livestock farming, apart from producing quality proteins it provides as well critical ecological and socio-cultural services (ie. habitats maintenance, territorial identity, cultural heritage, climate risk prevention).

The Strategy is a response to ambitious goals outlined in the Vision and it recognises the need to secure a future for the sector and meet the demands for a competitive, resilient and sustainable European livestock sector fitting the EU territorial and social diversity.

Stakeholder engagement has been central in developing the Strategy. Consultations involved Member States, farmers, industry representatives, civil society and academia. These discussions ensure that the strategy reflects diverse perspectives and interests.

The Strategy represents a comprehensive approach to strengthening the sector's contributions to agriculture, rural landscapes, the environment, climate adaptations and socio-economic welfare. It aims to ensure that competitiveness, sustainability and fairness go hand in hand across Europe. This Staff Working Document presents the current state of the livestock sector in the EU and summarises the consultations and analysis carried out. As the EU adapts to a changing global environment, the strategy will help ensure the livestock sector remains a core component of the Union's agricultural and economic fabric.

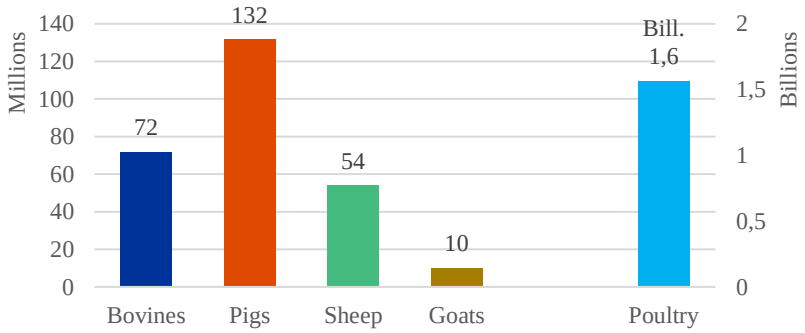
([1]) https://agriculture.ec.europa.eu/overview-vision-agriculture-food/vision-agriculture-and-food_en.

CHAPTER I: AN OVERVIEW OF THE LIVESTOCK SECTOR IN THE EU

Livestock population

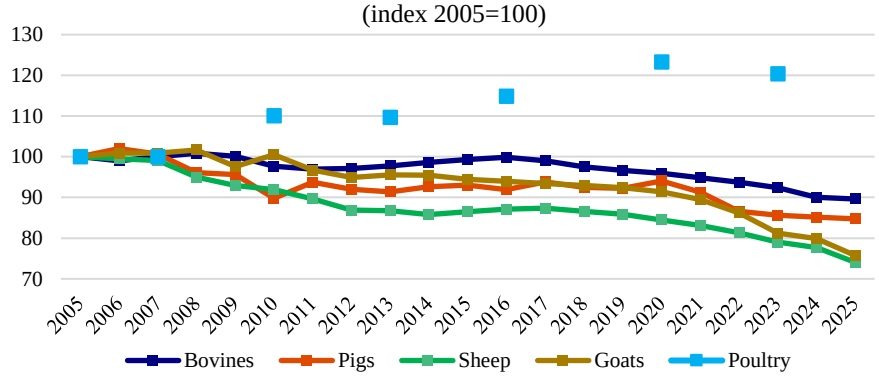
In 2025, the European Union had a significant livestock population ([2]): 132 million pigs, 72 million bovine animals, 54 million sheep and 10 million goats, and around 1.6 billion poultry birds ([3]).

Chart 1: Animals (heads) in EU holdings



Over the past two decades (2005-2025), livestock numbers across almost all species have declined sharply throughout the EU, particularly for small ruminants. Live bovine animals decreased by 10%, whereas domestic pigs dropped by 15%. The number of sheep has seen an even more significant reduction of 26%, and goats have similarly declined by 26%. Poultry is the only exception, marking an increase of 14% in the same period. However, it must not be overlooked that behind those overall trends there is a significant territorial diversity across EU regions with different implications as regards livestock density.

Chart 2: Evolution of livestock population
(index 2005=100)



([2]) Eurostat: Livestock populations (apro_mt_lscatl, apro_mt_lsgoat, apro_mt_lssheep, apro_mt_lspig, agr_r_animal). Farm structure (ef_lsk_poultry).

([3]) For poultry, latest data available is for 2023.

Looking at livestock population differentiated by farm typology, in the period 2010-2020 ([4]), livestock herds decreased the most in *Specialist Permanent crop* farms ([5]) (-41%) and in *Mixed livestock* farms ([6]) (-17%), across all livestock species. On the other hand, livestock herds increased the most in *Specialist granivores* ([7]) farms across all livestock species by 13%. Additionally, this farm type accounts for 82% of the livestock population in 2020 considering all livestock species.

Number of animals (LSU) in farms in the EU	2010	2013	2016	2020	2020 vs 2010
Specialist field crops	18.912.810	25.568.890	23.575.920	19.238.770	2%
Specialist horticulture	1.625.210	1.265.090	1.222.040	1.378.350	-15%
Specialist permanent crops	5.396.470	3.924.520	3.832.820	3.188.160	-41%
Mixed cropping	7.407.980	7.524.440	6.550.390	7.133.490	-4%
Mixed crops-livestock	105.902.610	109.209.370	100.768.460	95.362.910	-10%
Mixed livestock farms	99.281.320	88.950.800	82.127.820	81.965.130	-17%
Specialist granivores	1.396.502.230	1.381.367.910	1.464.399.580	1.579.506.270	13%
Specialist grazing livestock	141.624.690	141.177.070	142.186.330	139.860.580	-1%
Total	**1.776.653.310**	**1.758.988.100**	**1.824.676.060**	**1.927.633.670**	**8%**
Livestock farms	1.637.408.240	1.611.495.780	1.688.713.730	1.801.331.980	10%
Crop farms and mixed crops-livestock farms	139.245.080	147.492.310	135.949.630	126.301.680	-9%

Table 1: Evolution of number of animals in livestock Units (LSU) ([8]) in EU farms

Mixed livestock farms lost, between 2010 and 2020, around 35% of their bovine herd (the biggest decline for bovine animals across all farm typologies), 35% of their sheep population, 50% of their goat population and 40% of their swine population. In 2020, for ruminants, *Mixed livestock* farms represent not more than 5% of the total population of each species. Also *Mixed cropping* and *Mixed crops-livestock* farms were affected by high losses especially on goat herds and swine population (more than 35%).

Apart for bovine herds, *Specialist Permanent crop* farms lost at least 39% of the main domestic animal species population between 2010 and 2020 with the highest drop for goat population by 63%. On the other hand, ruminant population increased in *Specialist grazing livestock* farms *([9])*, for bovines by around 1.5 million heads, for sheep by nearly 2.3 million heads, and for goats by nearly 620 thousand heads. In *Specialist granivores farms*, swine population increased by around 7.3 million heads, and poultry population by 177 million heads ([10]), thus indicating an increasing degree of farm specialisation for both grazing and granivores.

([4]) Using Agricultural Census data.

([5]) Eurostat glossary: a crop-specialist holding is an agricultural holding where crop production is the dominant activity, providing at least two-thirds of the production or the business size of an agricultural holding.

([6]) Eurostat glossary; Farms with different livestock species

([7]) Eurostat glossary: Pig and poultry farms.

([8]) The livestock unit (LSU) is a reference unit which facilitates the aggregation of livestock from various species and age.

([9]) Eurostat glossary: Ruminant farms

([10]) Eurostat: Main livestock indicators by NUTS 2 region ([ef_lsk_main]).

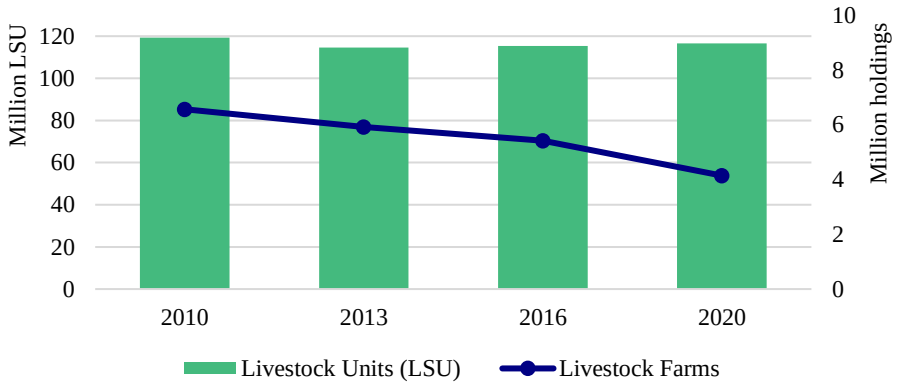
Livestock farming

There are approximately 4.1 million farms with livestock in the EU, representing 41% of all EU farms (2020 data) ([11]). In details, 21.6% of farms with livestock are classified as livestock specialists while 19.3% as mixed farming combining crops and livestock activities.

Most farms are small, with 41% having less than 2 hectares and around 60% having fewer than 5 livestock units (LSU). It must be noted that most of the farms below 5 LSU are in mixed farming systems and notably in two Member States: Romania and Poland ([12]).

Between 2010 and 2020, the number of livestock farms dropped significantly, continuing a long-standing downward trend and at higher level than crop-related farm types.

Chart 3: Evolution of livestock farms and livestock units (LSU)



The share of farms with livestock (specialist or not) decreased from 55.7% in 2010 to 41% in 2020. 6% of the farms ([13]) concentrate more than 70% of the EU's total LSU ([14]).

The average livestock density in the EU is 0.75 livestock units per hectare of utilised agricultural area (LSU/ha UAA) ([15]). However, there are significant regional differences, with regions ([16]) in Member States ranging from as low as 0.01 LSU/ha UAA to as high as 7.4 LSU/ha UAA ([17]).

([11]) Eurostat: Main livestock indicators by NUTS 2 region ([ef_lsk_main]).

([12]) Farm Sustainability Data Network (FSDN).

([13]) Farms with 100 LSU or more.

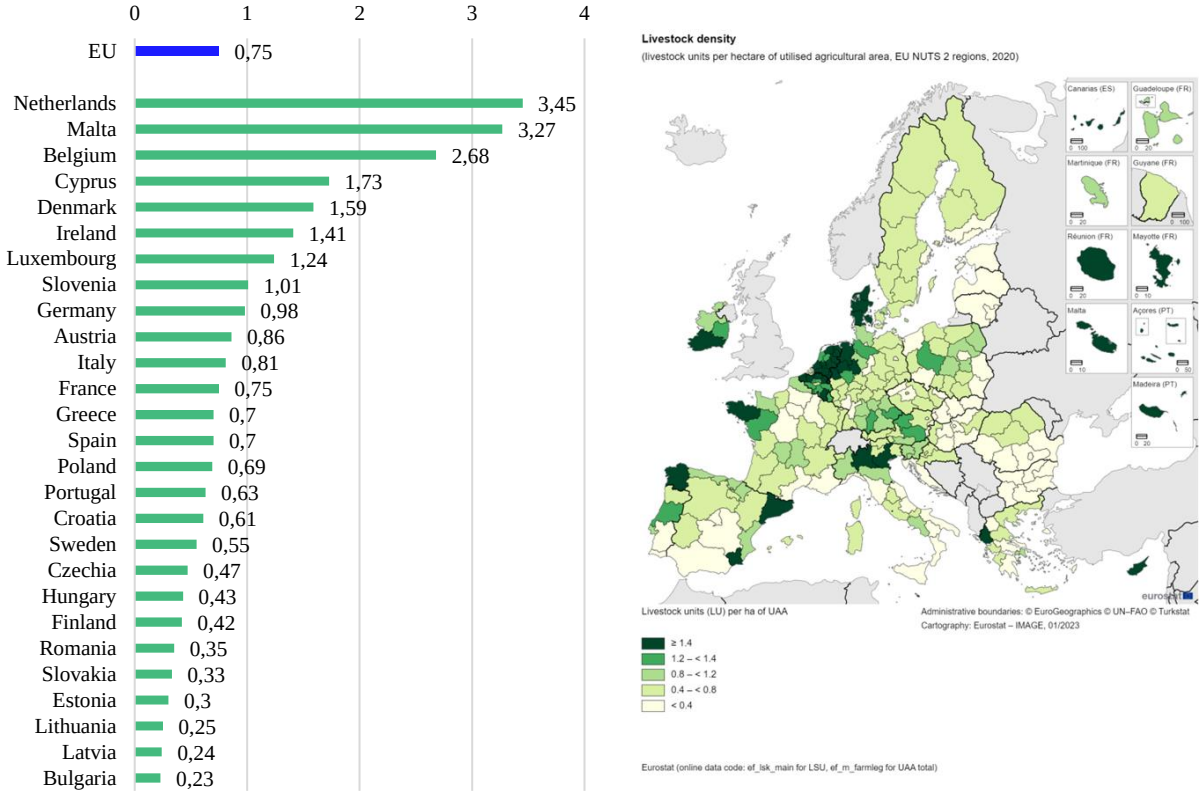
([14]) Eurostat: Farm structure (ef_m_farmleg, ef_lsk_main).

([15]) See footnote 2.

([16]) NUTS 2.

([17]) 0.01 LSU/ha UAA in AT13 (Wien) and 7.41 LSU/ha UAA in NL14 (Noord-Brabant). See also section on Spatial distribution and hotspots in Chapter III.

Chart 4: Livestock density: LSU/ha



Feed self-sufficiency and costs

Livestock farms increasingly rely on livestock feed produced outside of their own farms. Indicative figures ([18]) on the proportion of own-produced feed to the total cost for feed used on farms show a reduction from about 26% in year 2010 to 21% in 2023. Those shares are higher for feed for grazing livestock, that is cattle, sheep and goats, (36% and32%, respectively) and lower for feed for granivores, that is pigs and poultry, (14% and 9%, respectively), but the decreasing trend is similar. Eurostat's EAA data ([19]) further indicate that livestock producers mainly buy their feed (almost 2/3 of their needs) from outside of agriculture holdings (i.e. compound feed from feed manufacturers), while other farms represent overall a small supplier of feed for livestock production (below 10%). The share of the external sourcing of feed increased over the years.

([18]) FSDN public database: variables (SE310) Feed for grazing livestock (€/farm), (SE315) Feed for grazing livestock home-grown (€/farm), (SE320) Feed for pigs & poultry (€/farm) and (SE325) Feed for pigs & poultry home-grown (€/farm). Note that valuation of own-produced (home-grown) and used feed at farms is difficult, so these could be underestimated. Nevertheless, evolution of these variables should be informative of the trends.

([19]) Economic accounts for agriculture - values at current prices [aact_eaa01__custom_20601979].

Chart 5: Proportion of own-produced feed in all feed used at farms

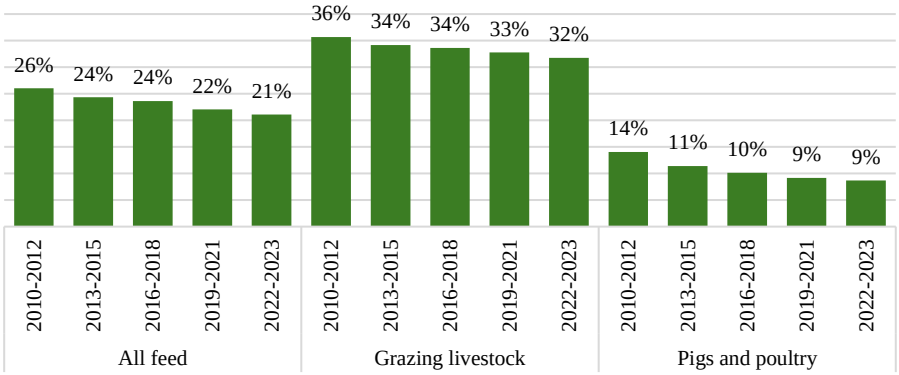
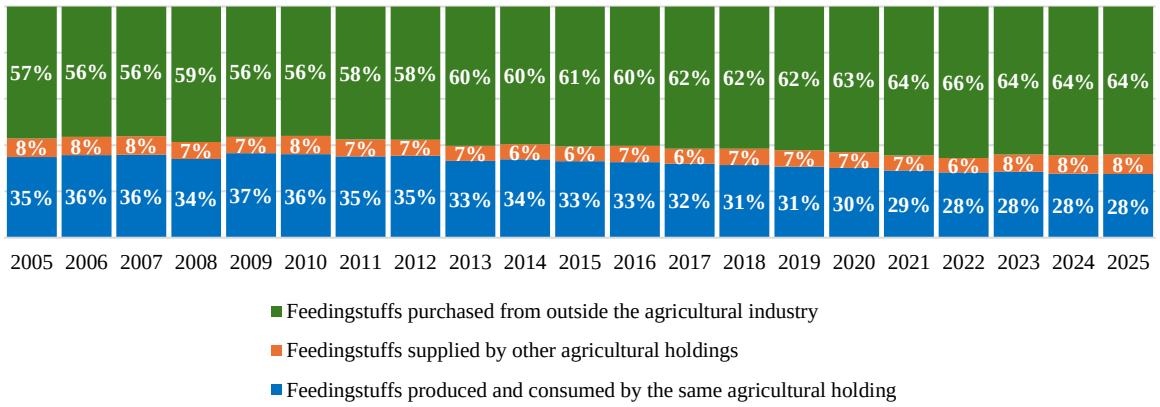


Chart 6: Origin of feed in EU farms



Feed costs represent on average around 25%-28% of total costs for all sectors in the EU27, making it the highest share of cost, followed by fixed capital consumption (16% in 2023) and compensation of employees ([20]). However, in farms specialising in livestock production the feed costs have a higher importance[21]). In specialist dairy farms the feed component represents on average over 30% of reported costs, with an increase to 36% in 2022, the year of Russia's full-scale attack on Ukraine, a major feed producer, and a subsequent spike of feed prices worldwide. Other grazing livestock specialist farms (beef cattle, sheep and goats) have similar shares of feed in their farming costs as dairy farms, while mixed farms have the lower reliance to purchased feed (28% of total costs). By contrast, in farms specialising in pigs and poultry producers the share of feed costs neared 60% of all reported costs, and it exceeded that level in 2022, when feed prices soared.

Organic livestock farming

Organic farming is a production method that aims to produce food using natural substances and processes. This means that organic farming tends to have a limited environmental impact as it encourages responsible use of energy and natural resources, maintenance of biodiversity, preservation of regional ecological balances, enhancement of soil fertility, maintenance of

([20]) As reported in Eurostat's EAA annual data.

([21]) Data from FSDN.

water quality. Additionally, organic farming rules encourage a high standard of animal welfare and require farmers to meet the specific behavioural needs of animals. Organic farming is supported by the EU, which adopted an Organic Action Plan in 2021 ([22]).

The organic sector in the EU, in terms of organically cultivated areas, increased with an average annual growth rate of 5% from 2012 to 2023, reaching 17.5 million ha and 10.9% of the total UAA.

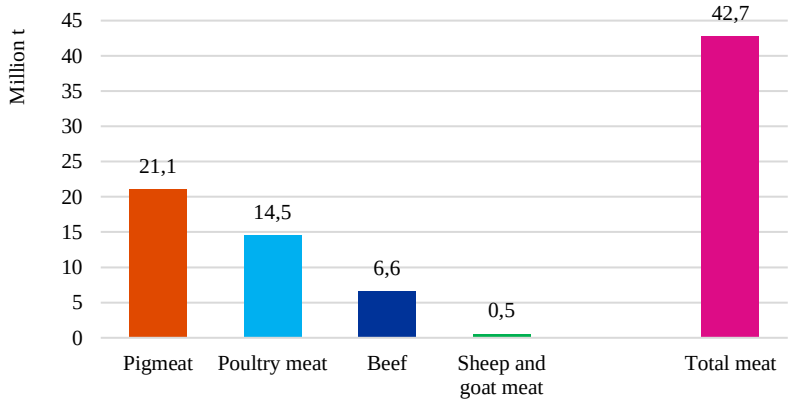
A similar increasing trend of average annual growth rate of around 4 - 4.4% depending on the species can be seen on the number of organic live animals, with a peak in 2022-2023. Organically reared bovines represented 4.6% of total bovines in 2016 and reached 7% of total animals in the EU in 2024. Organic dairy cows represented 3.4% of total dairy cows in 2016, reaching 4.9% in 2024. Sheep and goats are the species with the higher percentage of organic animals: 9.3% for sheep and 10.2% for goats in 2024. Pigs have the lowest percentage with only 1.1% of organic pig in 2024 ([23]).

It is interesting to remark that this increasing trend occurred in an overall reduction in the population of number of animals, especially for sheep and goats which show the steepest decline in herd (22-23%) and the highest percentage of organic reared animals compared to other species.

Production and consumption of animal products

In 2025, the EU produced approximately 42.7 million t meat ([24]). Between 2015 and 2025 annual production grew by 0.3%, however it is projected to decline by 0.3% annually from 2025 to 2035. Overall, EU meat production is thus expected to decrease by 3% over the next decade. This includes reductions in beef production by 10%, pig meat by 7%, and sheep and goat meat by 7%. Poultry meat is the exception, with production expected to increase by 5% ([25]).

Chart 7: meat production in 2025



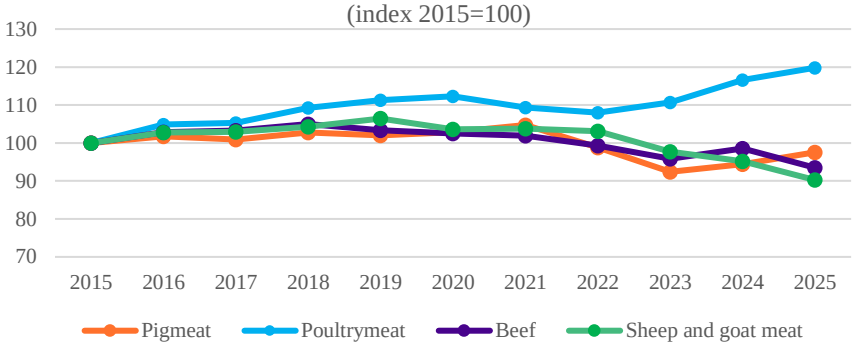
([22]) COM(2021) 141 final

([23]) Eurostat: Organic livestock statistics (org_lstspec).

([24]) Eurostat: Meat production (apro_mt_pann). DG AGRI, medium-term outlook on the prospects for agricultural markets and income (Report: EU agricultural outlook 2025-35). In carcass weight.

([25]) Eurostat: Meat production (apro_mt_pann); DG AGRI, medium-term outlook on the prospects for agricultural markets and income (Report: EU agricultural outlook 2025-35).

Chart 8: Evolution of meat production
(index 2015=100)



Additionally, in 2025, the EU produced 161.8 million t milk, enabling the production of 10.8 million t cheese, 2.3 million t butter and 2.7 million t milk powder; ([26]) EU farms also produced about 6,4 million t of eggs for consumption ([27]). Despite the decline in the number of dairy cows thanks to the increase of milk yield, between 2015 and 2025 annual milk supply grew by 0.8%, and it is projected to further increase by 0.1% annually from 2025 to 2035, thus 1% in total in the next decade. The production of eggs for consumption increased by 7% between 2015 and 2025 and is projected to increase by 5% from 2025 to 2035.

Farming activity and production in other subsectors such rabbits, horses, beekeeping, and other species, for example reindeer, should not be neglected as there are significant in certain Member States and their regions.

Regarding meat consumption ([28]), the current total per-capita apparent consumption in the EU is about 47 kg in retail weight ([29]). Between 2015 and 2025 there was a 3% decrease in per-capita consumption, and a marginal decline of 1% is expected from 2025 to 2035. However, the situation differs among meat types. While consumption of beef and pigmeat is projected to decline by -9% and -6% respectively to 2035, and sheep and goat meat consumption will marginally increase (+1%), poultry meat consumption is expected to continue clearly upwards by 9% ([30]).

In addition, the consumption of fresh dairy products (fresh milk, cream, yoghurt and others) declined by -5% from 2015 and 2025 and is expected to continue declining by 7% from 2025 to 2035. The consumption of cheese (+5%) and butter (+5%) is projected to increase as well as egg consumption (+6%).

The EU livestock sector uses around 71 million tonnes of protein as feed annually. The main sources of feed protein are roughage (41%), cereals (21%), soya bean meal (16%), and other oilseed meals (11%); the remaining 11% is obtained by various other sources.

([26]) Eurostat: Milk and milk products (apro_mk_pobta).

([27]) DG AGRI Estimation (Report: EU agricultural outlook 2025-35).

([28]) DG AGRI Estimation (Report: EU agricultural outlook 2025-35).

([29]) Corresponding to 66.7 kg per year in carcass weight equivalent.

([30]) DG AGRI, medium-term outlook on the prospects for agricultural markets and income (Report: EU agricultural outlook 2024-35).

Imports cover 25% of the protein used to feed EU livestock. At the same time, EU exports the equivalent of 10% of the EU's protein needs for animal feed in arable crop products or co-products. Therefore, the EU's net reliance on imported protein for its feed is about 15% of its total feed use (or about 10 million tonnes of protein). Although the EU is largely self-sufficient in low-protein content feed, only 25% of high-protein content feed, from oilseeds and protein crops, used as feed in the EU is of EU origin. The EU's low self-sufficiency in oilseeds and protein crops is largely explained by the fact that 94% of the soya protein used in livestock feed is imported.

Among the different protein sources, high-protein plant-based feed accounts for 30% of the total EU feed use of protein (or 21.4 million tonnes of protein) ([31]).

Production of organic livestock products

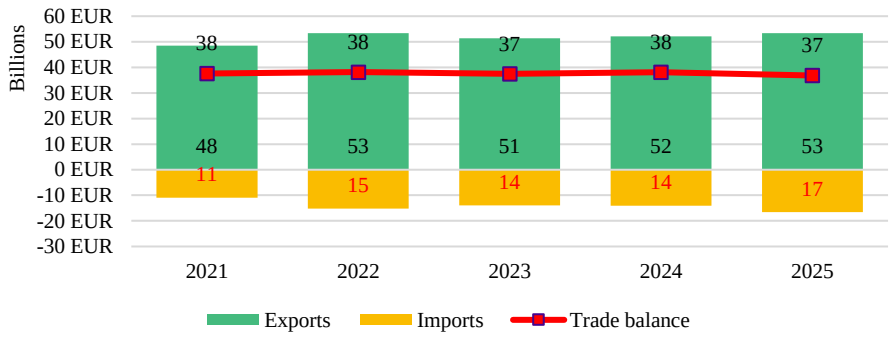
The share of organic meat production out of total meat produced in the EU is lower than the share of organic livestock. Organic poultry meat and pigmeat account for only 0.3% each of the total pigmeat and poultry production in 2023. The share of organic beef (2.6%) and sheep (3.9%) meat production are somewhat higher at EU level and show an increasing trend ([32]).

The share of organic milk production in the EU was of 3.5% in 2024, compared to 2.4% in 2016, with an average annual growth rate of 3.7% ([33]).

Trade in animal products

The EU is a leading global trader in animal products, with a strong and growing export-oriented sector. In 2025, the EU exported EUR 53 billion worth of animal products, while imports amounted to EUR 16 billion.

Chart 9: Trade balance evolution (Value in billion EUR)



Dairy products are the EU's top export: in 2025 they were worth EUR 20.7 billion with a net trade surplus of EUR 18 billion. Pigmeat followed with EUR 12 billion in exports and a surplus of EUR 11.6 billion. Beef and veal exports reached EUR 5 billion, with a surplus of EUR 1.6 billion. Poultry and eggs also performed strongly, with exports worth EUR 6.5 billion and

([31]) DG AGRI: Oilseeds and protein crops balance sheets. Factsheet: Supply and demand of proteins for food and feed. Report from the Commission to the Council and the European Parliament on plant proteins for a sustainable food system.

([32]) Own calculations based on Eurostat: Organic production of animal products (org_aprod) and Eurostat: Meat production (apro_mt_pann).

([33]) Eurostat: Organic production of animal products (org_aprod).

a surplus of EUR 3.5 billion. Other animal products generated EUR 8.2 billion in exports, with a surplus of EUR 2.6 billion. Sheep and goat meat, however, recorded a deficit of EUR 0.75 billion, with imports exceeding exports.

Chart 10: Products traded 2021-2025

The UK remains the EU's largest trade partner, absorbing 28% of EU animal product exports. China follows with 8.2%, the US with 7.8%, and Japan with 3.9%. Other regions and countries account for around 50% of EU exports. On the import side, the UK also leads with 29% of total imports, followed by China (9.8%), Brazil (9.7%), New Zealand (7.8%), Ukraine (6.2%) and the US (5.8%).

Chart 11: Trade partners 2021-2025

In summary, the EU remains a key player in global animal product markets. EU trade balance in animal products has been largely and consistently positive over the past decade. However, the EU livestock sector shows significant export dependencies, with most of the exports concentrated in few destinations. In particular, on UK, Switzerland, and Türkiye for beef and veal, and UK, US, and China for dairy products. Other animal products heavily rely on UK and US. Pigmeat exports are notably dependent on UK and China. Poultry and eggs exports are primarily directed to UK. These dependencies highlight potential vulnerabilities if trade relations with such partners deteriorate or demand in these key markets fluctuate.

Animal health and resilience to major animal diseases

The EU's harmonised animal health legal framework ([34]) − currently under evaluation ([35]) − is designed to ensure early detection and effective control of transboundary and climate-related animal diseases and enables the EU to manage these challenges effectively. However, the epidemiological situation for major transboundary animal diseases (TADs) in the EU deteriorated, in particular in 2025.

The TADs situation is driven by multiple factors, notably climate change (expansion of insect vectors into new geographic areas) and increased global movement of people and animals. Incomplete implementation of measures contributed to the persistence and increased circulation of TADs. Potential negligence or intentional actions by external actors may also play a role.

These diseases pose serious risks to animal health and in some cases also human health, the economy, food security and safety, and are causing major global market disruptions. Direct financial losses are also high, with substantial resources needing to be mobilised for eradication. Limited EU co-financing of veterinary measures and scarce financial resources in the Member States, coupled with eradication fatigue, societal resistance to certain control measures, increase uncertainty. Weak farm biosecurity further exacerbates these impacts.

Use of machineries for livestock management and digitalisation

One-quarter of farms with livestock have machinery dedicated to livestock management. These farms account for 71% of the total LSU, suggesting that farms using such machinery tend to be the largest in terms of livestock capacity. The share of LSU raised in farms with specific machinery varies across countries, ranging from 20% in Greece to 91% in the Netherlands and 92% in Denmark. The most common type of machinery is grinder mixer for animal feeding, found in 15% of farms with livestock, followed by machinery for welfare and health monitoring of animals, present in 11% of farms. ([36]).

The adoption of livestock machinery is linked with the farm manager qualifications. 50% of farms with managers having full agricultural training are using specific livestock machinery compared to 36% of farms whose manager has basic agricultural training and just 16% of farms where managers rely solely on practical experience. Age also appears to influence the adoption of livestock machinery. Farmers under 40 have the highest adoption rate (40%), compared to those aged 40 and 64 years (29%) and to farmers over 65 (12%).

In 2023, 60% of farms specialising in grazing livestock had internet access. Only one third of grazing livestock farms had machinery for livestock management (covering 58% of LSU). One out of five farms used management information systems and precision farming. Robotics were the least common digital technology, found in just 16% of holdings. Granivore farms had a higher adoption rate of digital technologies. Specifically, 59% of holdings were equipped with machinery for livestock management and one third utilised robotics, covering 95% and 64% of LSU respectively. ([37])

([34]) https://food.ec.europa.eu/animals/animal-health/animal-health-law_en#about-the-animal-health-law.

([35]) https://food.ec.europa.eu/animals/animal-health/animal-health-law_en#evaluation-of-the-animal-health-law.

([36]) Eurostat IFS (ef_mp_digilsk), 25/03/26. Above the threshold.

([37]) Eurostat IFS (ef_mp_digi), 24/03/26. Above the threshold.

Farms specialising in crop production exhibit a lower proportion of holdings with internet access (37%), nevertheless, these holdings account for 68% of the total Utilised Agricultural Area (UAA) of crop farms. Similarly, precision farming is adopted by only 17% of crop farms yet applies to 47% of their UAA, while management information systems are used by 9% of farms but cover 35% of their UAA. These disparities suggest that larger farms are more likely to adopt such technologies.

Animal housing

The analysis of animal housing systems and outdoor access ([38]) reveals strong structural contrasts across livestock sectors and a consistent divergence between the distribution of practices across holdings and across animal numbers. In poultry and pig production, outdoor access remains limited in terms of animals (around 2.2% for poultry and generally below 5% for pigs), despite being more widespread at farm level (28% and around 10% of holdings respectively), indicating that such systems are present but operate at smaller scale. Indoor housing further highlights this duality: for laying hens, cage systems account for about 36% of animals; for pigs, 85% of the sows in the EU are kept in farrowing crates during farrowing and 65% are kept in gestation crates during gestation, whereas more extensive systems are widely adopted but involve fewer animals. This points to a strong concentration of indoor-based production in a limited number of large farms. In contrast, bovine production is largely characterised by outdoor-based systems, with around 78.8% of cattle and 77% of holdings having access to outdoor areas, indicating a closer alignment between farm practices and animal distribution. However, important differences remain across Member States, particularly in grazing duration and housing systems, reflecting diverse production models. Overall, the results highlight a dual structure in EU livestock production, where indoor-based systems dominate in terms of output, while more extensive practices are more prevalent across farms, especially in the poultry and pig sectors.

Slaughtering capacity

An exploratory analysis of slaughtering capacity based on company-level data, covering around 840 slaughter-related establishments across the EU ([39]), indicates a strong spatial concentration of processing infrastructure in Western Europe, notably in France, the Benelux, Germany and Spain, while coverage appears more limited in several Eastern and peripheral regions. The distribution of slaughtering capacity is highly skewed, with a median capacity of approximately 16 000 head/week, compared to a 75th percentile exceeding 200 000 head/week and maximum reported values reaching around 4.8 million head/week. This reflects the coexistence of a small number of very large, industrial-scale facilities alongside a wider network of smaller regional plants. Clear differences also emerge across species: poultry slaughtering is characterised by the highest capacities and strongest spatial concentration, while pig slaughtering also shows clustering in central-western Europe, and beef and sheep slaughtering appear more geographically dispersed and generally associated with lower-capacity sites. Overall, these patterns highlight a marked structural heterogeneity in slaughtering systems across the EU, which may have implications for market organisation, supply chain resilience, and the accessibility of processing facilities in more remote or less densely equipped regions.

([38]) Eurostat IFS (ef_ah_bovt , ef_ah_pigt , ef_ah_poult), 27/03/26.

([39]) The analysis is based on company-level data from the GIRA ‘Meat Company Panorama’, compiled by GIRA.

CHAPTER II: ECONOMIC AND SOCIAL DIMENSIONS

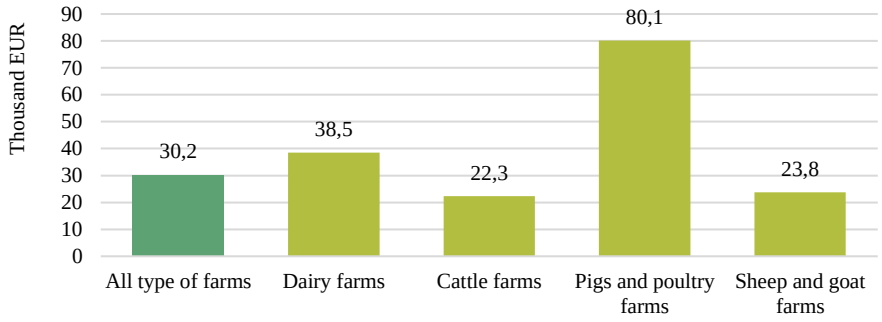
Livestock farms economics and income

The EU livestock sector accounts for approximately 40% of the total output in European agriculture, with industries related to animal production, such as milk and meat processing and livestock feed, generating an annual output of around 350 billion euros ([40]).

In addition, crops grown on 71% of EU agricultural land are used, at least in part, for livestock feed The EU livestock sector is therefore key for the economics of the EU arable crop sector. The EU livestock sector represents, together with arable crops production used as feed, more than half of the total agricultural output (59% in 2024).

In 2023, latest available year, the average farm net value added (FNVA) in the EU, as reported by the Farm Sustainability Data Network (FSDN), was EUR 49 600 (EUR 30 200 per worker). Farms specializing in pigs and poultry reported the highest FNVA at EUR 210 000 (EUR 80 100 per worker), followed by the dairy sector at EUR 77 000 (EUR 38 500 per worker), both exceeding the EU average. In contrast, income in grazing livestock farms (cattle, sheep, goats, and mixed farms) was lower, at EUR 30 200 (EUR 22 300 per worker) in cattle farms and EUR 36 800 (EUR 23 800) in sheep and goat farms ([41]).

Chart 12: Farm Net Value Added (FNVA) by Annual Work Unit (AWU) by type of farming
(2023)



Analysing FSDN data on the whole agricultural sector by detailed type of farming on the average 2019-2023 to have a deeper comparison between type of farming and effects of farm size, it is possible to further differentiate the economic results of livestock farms depending on their specialisation and compared with the rest of the sectors.

On one hand, granivores farms reach the highest farm income at EU level with an average FNVA/AWU above EUR 60 000 and a median close to EUR 34 000. Almost reduced by half compared to granivores, but still at a high level compared to the other farm types, the dairy farms have in average an FNVA/AWU about EUR 36 000 and a median of EUR 18 000. On the other hand, cattle farms and sheep and goat farms as well as the mixed crops - livestock farm have the lowest incomes together with the farms specialized in permanent crops other than wine. Cattle and sheep and goat farms reach, on average, between EUR 22 000 and EUR 21 000 per AWU, with a median around EUR 13 000. The mixed crops and livestock farms have on

([40]) Eurostat - Economic Accounts for agriculture (aact_eaa01).

([41]) Farm Sustainability Data Network (FSDN).

average an FNVA per AWU of EUR 20 000, but the median goes down to EUR 5 500. This very low median is also observed in mixed livestock farms.

Table 2: Average FNVA/AWU per farm type

Farm Net Value Added (EUR/AWU)	Average 2019-2023
Granivores	60.742 EUR
Milk	36.054 EUR
Wine	34.221 EUR
Horticulture	31.832 EUR
Other fieldcrops	31.584 EUR
Cereals, Oilseeds and protein crops	30.657 EUR
Mixed livestock	26.321 EUR
Orchards - fruits	22.274 EUR
Cattle	21.881 EUR
Olives	21.789 EUR
Sheep and goats	21.540 EUR
Mixed crops and livestock	19.993 EUR
Mixed crops	19.216 EUR
Permanent crops combined	18.690 EUR

The differences between average and median values provide indications about the variability among these classes, especially for mixed farms where such differences are higher. Income levels among livestock farms vary substantially across regions and production types. Pig and poultry farms recorded a 19% increase in income per worker in 2023 and remained the most profitable livestock systems, with average income levels well above the EU average for agriculture (?). In contrast, mixed farms, many of which include livestock activities, show the lowest income levels. Geographically, livestock farms in north-western EU regions benefit from higher income levels, while farms in eastern, Baltic, and south-eastern regions record considerably lower results, reflecting both structural and market differences.

The effect of farm size on economic results

Farm size remains a key determinant of profitability in livestock production. Irrespective of the agricultural sector, farm economic size plays a significant role when it comes to income, together with the intensity of the farming system and the related livestock/land density. Consequently, larger livestock farms generally achieve higher income per worker, as higher productivity outweighs higher (unit) costs for land and capital. Smaller livestock farms, particularly those focused on grazing systems, showed lower market income and stronger dependence on policy support. Differences in income were also associated with farm organisation, with livestock farms relying heavily on borrowed capital and hired labour, especially in confined systems such as pig and poultry production ([42]).

Based on FSDN 2019-2023 average data, the dairy and the mixed crops - livestock farm types reach similar levels of income of the other livestock farm types at lower herd sizes. Dairy and mixed crops − livestock farms reach FNVA/AWU close to 40 000 euro with herds of 50-

([42]) DG AGRI: Analytical Brief N°9: Explore Farm incomes in the EU – Key developments in 2023.

100 livestock units, while for the cattle, sheep and goat as well as granivores farm types, this level of income is reached with larger herds, about 100-250 LSU.

Traditional land management practices, including extensive grazing, transhumance with locally adapted livestock breeds, the maintenance of permanent crops, and agroforestry systems, are often underutilised or threatened by abandonment. Their continuation is hindered by socio-economic difficulties and by natural or other specific constraints that limit the viability of farming in these areas.

Looking at data on income excluding the subsidies component (other than investments' support) in the calculation of farm income, shows the effects of subsidies on the different farm types. In particular the category which relies more on subsidies is cattle farms and also, to a lower extent, the mixed crops/livestock and the sheep and goat farm types. Milk farms, as from a certain herd size, manage to reduce their dependency to subsidies by increasing the share of income from market. Granivores farms, often with structural higher herd sizes, are in general less dependent on the subsidies compared to the other farm types.

Concerning mixed crops and livestock farms, FSDN data shows that the low income generated by this type of farming is mainly due to the reduced size: more than 50% of these farms in FSDN have less than 5 LSU and 2/3 less than 10 LSU. Two Member States, Poland and Romania, represent more than 55% of the mixed crops and livestock farms and 66% of these mixed farms with less than 10 LU.

Assets and investments in livestock farming

In terms of economic size expressing the scale of crop and livestock production, farms specialising in milk, pigs and poultry are bigger than the average while beef, sheep and goat producers as well as mixed livestock farms are usually smaller. Accordingly, the assets of milk and granivore farms are about double the average value of assets per farm. Except for beef cattle, sheep and goat producers, livestock farms invest more into their farms than the average. However, in terms of economic returns to the value of engaged assets, livestock farms generally do worse than the average. The exception is the pigs and poultry production, with varying but often high return to assets, rivalling that in horticultural production which has the highest returns to assets on average.

Economic performance of ruminant farms

While the previous section covers all types of livestock farms, including pigs and poultry, the following analysis focuses specifically on ruminant systems, given their distinct production structures, reliance on grazing-based feeding and particular environmental and territorial roles. Income patterns in ruminant systems are closely linked to grazing intensity when measured relative to grazable area, although relationships vary significantly across production types and regional contexts. Analysis based on FSDN microdata (2019–2023) shows that, at EU level, the income (i.e. farm net value added per annual work unit (FNVA/AWU)) generally increases with stocking density, but with substantial heterogeneity across systems and Member States. The grazable area indicator, defined as the sum of permanent grassland and temporary grassland, provides a robust proxy for the land actually available for grazing, while excluding cut-only fodder crops such as silage maize that are not typically grazed. Using this definition, three intensity classes can be distinguished (<1 LU/ha, 1–1.4 LU/ha, >1.4 LU/ha), allowing comparison between extensive, intermediate and more intensive systems, representing 1 502 796 (32.3%), 711 427 (15.2%) and 2 443 542 (52.5%) farms respectively. In scientific

literature, 1.4 LU/ha (Livestock Unit per hectare) is commonly defining a threshold to distinguish between extensive and intensive grazing systems ([43]); however, it is useful to analyse results based on a broader range of parameters, as sometimes lower thresholds are used.

At EU level, income differences across intensity classes can be substantial in certain systems. In specialist dairy farms, median FNVA/AWU increases markedly with stocking density, from around EUR 8 000 per worker in low-intensity systems (<1 LU/ha) to approximately EUR 28 000 per worker in more intensive systems (>1.4 LU/ha), reflecting higher productivity and output levels.

By contrast, specialist beef systems show much weaker income differentiation across intensity levels, with median income remaining broadly stable, around EUR 15 000–16 500 per worker across classes. Mixed and diversified systems display more heterogeneous patterns, with median income levels typically ranging between EUR 5 000 and EUR 22 000 per worker depending on the relative importance of livestock and crops and the degree of specialisation.

Despite these differences, income gaps between extensive and intensive systems are not systematically significant across all Member States and farm types. In many cases, once variability within groups is considered, income levels between intensity classes are statistically similar, highlighting the importance of structural factors such as farm size, production orientation and regional conditions.

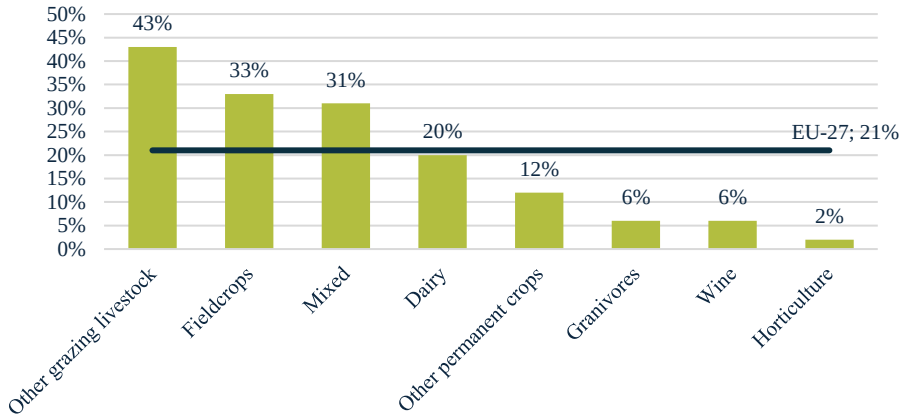
These results indicate that grazing intensity alone does not determine economic performance in beef systems, while it is a very reliable indicator of economic performance in dairy systems. Income outcomes reflect a combination of factors, including the type of production (beef or dairy), feed systems, structural characteristics and regional market conditions. In particular, extensive grassland-based system, often located in less favoured areas, tend to show lower market income and greater reliance on public support, while more intensive systems benefit from higher output but also face higher input costs and capital requirements.

Financial support

Direct payments under the Common Agricultural Policy (CAP) continue to play a major role in stabilising livestock farm incomes, particularly for grazing livestock and dairy farms. On average, these payments account for 21% of farm net value added at the EU level, but this share rises to 43% for grazing livestock farms, highlighting their strong reliance on income support. The relative importance of direct payments increases for livestock systems experiencing the largest income declines, underlining their role in mitigating income volatility and supporting the economic viability of livestock farming in the EU.

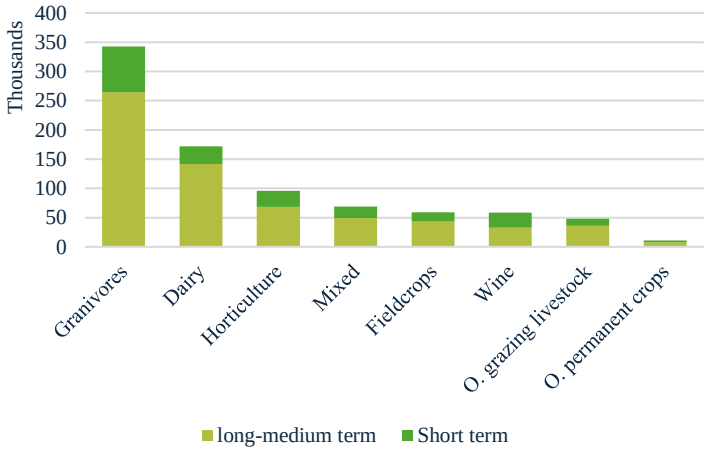
([43]) Bielza, M., Weiss, F., Hristov, J., & Fellmann, T. (2025). Impacts of reduced livestock density on European agriculture and the environment. Agricultural Systems, 226, 104299. https://doi.org/10.1016/j.agsy.2025.104299

Chart 13: Share of direct payments in FNVA by farm type (2023)



Livestock farms, particularly those involved in granivore production (pigs and poultry), depend heavily on borrowed capital. In 2022, the financing gap for animal production was estimated at EUR 18.7 billion, representing about 30% of the overall financing gap for EU agriculture (EUR 62 billion)([44]).

Chart 14: Farm loans by type of farm (2023)
EUR/farm



Included in the support offer for the agriculture sector, the European Investment Bank (EIB) Group offers a range of financial instruments, including guarantees, direct lending, venture debt, and private equity, to support investments in farming practices that reduce livestock methane emissions. These instruments are designed to address structural financing gaps in the agricultural sector, particularly for capital-intensive technologies such as anaerobic digestion and manure management upgrades. However, awareness of these EIB financing opportunities remains low among farmers ([45])

Additionally, across Europe, several pilot projects are currently underway to reward farmers for adopting practices that increase soil carbon and/or address enteric fermentation and manure management. Beyond public support instruments, livestock farmers may access emerging

([44]) EIB fi-compass Report: Financing gap in the agriculture and agri-food sectors in the EU.

([45]) Report: Financing opportunities for livestock methane reduction. ECORYS

climate and environmental markets where measurable emission reductions, carbon removals, and nature-positive outcomes are generated. These include biodiversity conservation payments linked to grassland management, watershed protection schemes, and soil carbon crediting in rangelands. Under the Carbon Removals and Carbon Farming (CRCF) Regulation ([46]), agricultural practices that increase net carbon removals in soils—such as improved grassland management, permanent grassland, rotational grazing, and mixed swards—can be certified. The Commission is currently evaluating whether to extend the scope of the Regulation to include livestock emission reductions from enteric fermentation and manure management.

In parallel, and in line with the Roadmap towards Nature Credits ([47]), nature credit schemes are being developed to provide complementary financing opportunities for a wide range of activities that demonstrably improve the condition of ecosystems or maintain them in good condition. Livestock systems are integral to the scope of nature credits, covering both active restoration efforts such as restoration of grasslands or peatland rewetting with adapted grazing regimes, and the continuation of these essential management practices, such as the maintenance of species-rich grasslands, pastoral hedgerows, and riparian buffers that would otherwise deteriorate. Where robust methodologies and governance frameworks are developed and implemented, nature-positive outcomes going beyond individual legal obligations can generate nature credits, enabling private actors to invest in measurable nature-positive actions linked to sustainable livestock systems.

Socio-economic and cultural dimensions of livestock grazing

Livestock grazing plays a crucial role in the socio-economic and cultural fabric of marginal territories across Europe. In mountainous regions such as the Pyrenees, Alps, and Carpathians, extensive grazing systems are integral to regional identities and cultural heritage. These systems support food and feed production in areas with natural constraints, where economic viability is often limited. Without viable livestock farming, large shares of these areas would be at risk of abandonment, leading to loss of agricultural land, biodiversity and increased hazards, notably wildfire. The management of grassland ecosystems and related cultural heritage is essential for maintaining the socio-economic stability of these regions. The Vision emphasizes the need to valorise the link between livestock production and the preservation of biodiversity and landscapes, highlighting the importance of extensive livestock systems in these areas.

Other social dimensions of livestock

Jobs

The livestock-related value chain represents about one-third of all jobs and value within the agri-food sector (approximately 7 million people) ([48]). Livestock farms employ roughly 4 million people across the EU, making up 42% of the EU's agricultural labour force ([49]). Within aggregated EU figures, there are very varied national and regional situations.

([46]) Regulation (EU) 2024/3012 establishing a Union certification framework for permanent carbon removals, carbon farming and carbon storage in products. https://eur-lex.europa.eu/eli/reg/2024/3012/oj.

([47]) COM/2025/374 final. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:52025DC0374.

([48]) Eurostat: structural business statistics [sbs_ovw_act]; Farm indicators [ef_m_farmleg].

([49]) Eurostat: Farm indicators [ef_m_farmleg].

A typical livestock farm has on average 48 LSUs and employs one to two workers in addition to the farm owner. Available statistics ([50]) show that average working units (AWU) per holding in livestock farms increase clearly with physical farm size. Very small livestock farms (over 0 to less than 30 ha) operate with about 1 AWU per holding, indicating predominantly family labour or limited workforce intensity. Farms with no land and those between 30 and 99.9 ha require around 2 AWU per holding, suggesting a more labour-intensive organisation despite fewer holdings. The largest livestock farms (100 ha or over) stand out, averaging 4 AWU per holding, which reflects a much higher labour requirement per farm, likely linked to greater scale, specialisation and more complex management. Overall, the figures show a strong positive relationship between farm size and labour input per holding in livestock farming, but also a negative correlation with standard output thanks to economies of scale.

Age and gender

Available statistics on age and gender of farmers ([51]) shows a clear age concentration of livestock farming ([52]) among middle-aged and older farmers, in line with the overall farming situation. Both the number of livestock units (LSU) and number of holdings rise steadily from younger age groups and peak between 40 and 64 years, indicating that the core of livestock production is managed by farmers in their mid and late-career stages. Farmers under 40 account for only a small share of total LSU (18%) and holdings specialised in livestock (14%) ([53]), suggesting limited generational renewal in the sector. Even though the 65-and-over group manages fewer livestock units (11%) than the 40–64 cohort, they control one third of livestock holdings, pointing to an ageing farming population with many older farmers still retaining farm ownership, often with smaller average herd sizes.

Strong gender differences are evident across all age groups. Male farmers dominate livestock farming in every age category, holding the vast majority of livestock units (86%) and a higher number of holdings specialised in livestock farming (74%) ([54]). Female participation is consistently lower (even lower than in crop production), particularly in terms of LSU (14% in the EU in 2020 versus 11% in 2010, ranging from 2% in Hungary to 35% in Austria) and farm sizes on female-managed farms.

([50]) Eurostat: Farm indicators [ef_m_farmleg].

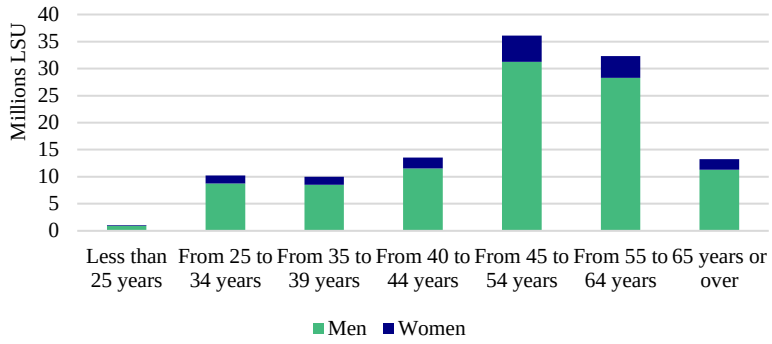
([51]) Eurostat: Farm indicators [ef_m_farmang].

([52]) Distribution of LSUs.

([53]) Farms specialised in livestock manage 90% of LSU (Farm indicators [ef_m_farmleg]).

([54]) Eurostat: Tenure of agricultural holdings by utilised agricultural area, sex and age of farm manager and NUTS 2 region [ef_mp_tenure].

Chart 15: Distribution of livestock units (LSU) by age and gender of farmers (2020)

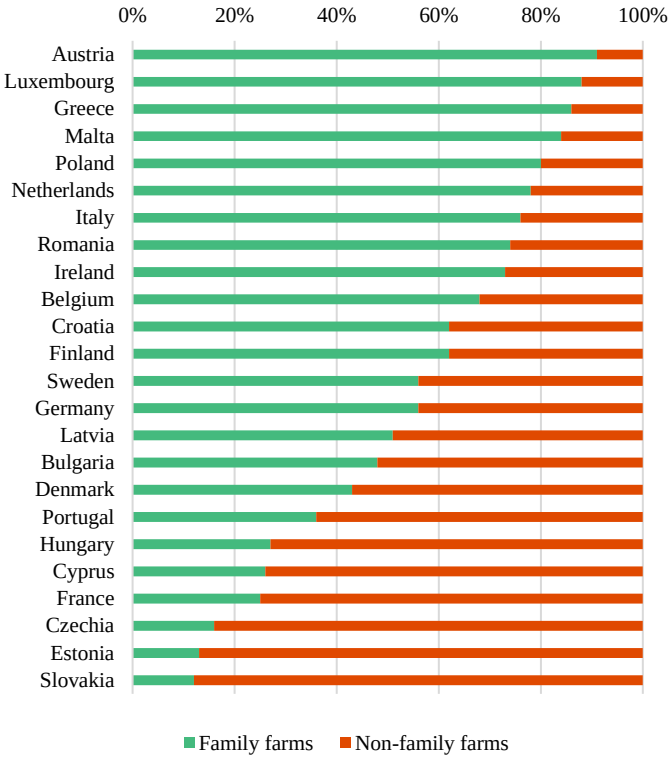


A family farm system

EU livestock farming is largely based on family-run farms ([55]). Family farming is the backbone of EU livestock production, accounting for most animals reared despite the generally smaller size of these holdings. In 2020, family farms represented about 93% of all EU farms and managed roughly 55% of all livestock units, confirming their central role in livestock farming systems. In most Member States, family farms reared most of livestock, exceeding 80% in some EU Member States (Austria, Luxembourg, Greece and Malta). Although family farms can also manage high herd sizes, these systems typically combine family labour with relatively limited land and herd sizes, embedding livestock production within local socio-economic structures and reinforcing strong links between farming households, territories and traditional production models. However, marked national contrasts persist. In Slovakia, Estonia and Czechia, less than one quarter of livestock were reared on family farms, reflecting a concentration of livestock production in large, non-family operations in those Member States.

([55]) Eurostat: Farm indicators [ef_m_farmang].

Chart 16: Distribution of farm livestock by type of farm (2020)



Family livestock farms are generally smaller and less capital-intensive than non-family farms, yet they remain dominant in terms of labour use and rural presence, sustaining employment and continuity in livestock-dependent regions. In eastern and southern Member States, many family farms combine livestock rearing with semi-subsistence or low-output systems, while in parts of north-western Europe family farms can be more commercial and productive despite remaining family-managed. At the same time, the ageing profile of family farm managers—over one third aged 65 or more—poses distinct challenges for the continuity of family-based livestock systems in certain regions. These contrasts underline that family livestock farming in the EU is not uniform, but territorially diverse, shaped by national structures, historical pathways and varying degrees of integration into markets and value chains.

Territorial diversity

Livestock farming in the EU shows a marked regional and territorial diversity ([56]). Such territorial diversity is strongly shaped by natural conditions, historical farming systems and regional specialisation patterns. In terms of number of farms, livestock-specialised farms are particularly concentrated in north-western and mountainous regions, where climatic and soil conditions favour grassland rather than arable cropping. In 2020, specialist livestock farms accounted for just over one-fifth of all EU farms, but their territorial footprint is uneven: Ireland stands out with almost nine out of ten farms specialised in livestock, while similar dominance is observed in parts of the Benelux countries, northern Spain, central France, southern Sweden and Alpine regions of Austria, France and Italy. Grazing livestock systems manage more than

([56]) https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Agri-environmental_indicator_-_specialisation.

65% of utilised agricultural area in these regions, underlining the strong geographical clustering of cattle, sheep and goat farming linked to pasture availability and topography as well as the relevance of grazing systems for the socio-economics of marginal territories the management of grassland ecosystems and the related cultural heritagea.. In Europe, many valuable protected habitats are to be found within the Natura 2000 network in Areas with Natural Constraints (ANC) and depend on grazing from extensive livestock farming for their management (EEA, 2026). This illustrates that territorial differentiation can usefully build on existing territorial realities and frameworks, including Natura 2000, where farming systems, biodiversity objectives and landscape management are closely interlinked.

Food and beyond

Animal products constitute important sources of several macro and micronutrients. They provide around 60% of the protein supply in EU diets. Additionally, animal by-products are used as raw materials in a wide range of industries, from textiles and medicine to industrial solvents, cosmetics, or biofuels.

Societal concerns

As outlined in the Vision, there are several societal concerns and expectations regarding livestock and livestock production in the EU, including growing concerns about farmers' well-being, the sector's environmental and climate footprint, intensifying trade and market competition, animal health and welfare risks, and uneven territorial impact.

In particular, EU citizens are increasingly concerned about animal welfare, and there is growing societal pressure to improve living conditions for livestock, as expressed by the European Citizens' Initiative "End the Cage Age" ([57]). Such societal concerns also emerged in the context of the public consultation on the modernisation of the EU animal welfare legislation ([58]). The need for sustainable livestock production is also highlighted, with a focus on reducing the sector's climate and environmental impact; the climate and environmental dimension is dealt with specifically in the next sections. Citizens are expecting more transparency and ethical practices in the agri-food sector, and this has led to calls for targeted labelling to better inform consumers about animal welfare and product origins.

CHAPTER III: ENVIRONMENTAL AND CLIMATE DIMENSIONS

GHG emissions

Agriculture is responsible for around 12.6% of the EU's total direct greenhouse gas (GHG) emissions, with livestock contributing approximately to 66% of these agricultural

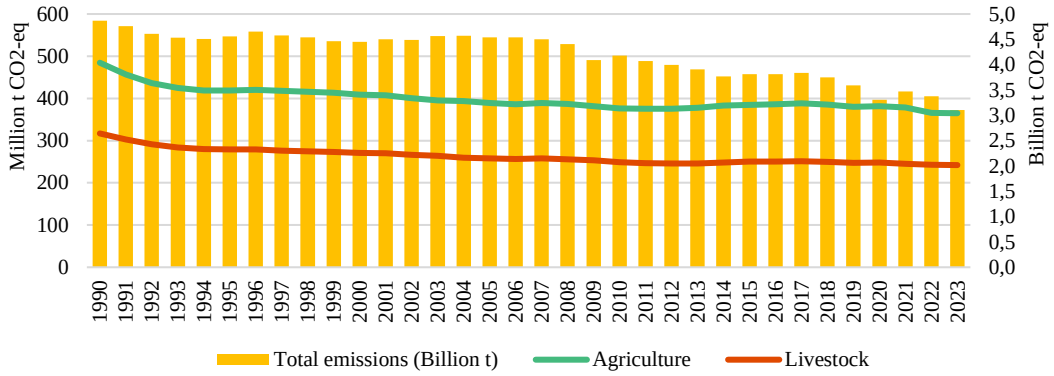
([57]) https://food.ec.europa.eu/animals/animal-welfare/eci/eci-end-cage-age_en

([58]) Launched on 19 September 2025 and ended on 17 December 2025 with almost 200 000 responses. The large majority of respondents, including a majority of companies and business organisations, considered the phasing out of cages to be very important or important for certain species. The majority of companies and businesses also considered the current fragmented legal landscape, caused by differing national rules and private standards as creating unnecessary administrative burden for EU farmers and business operators. Most respondents considered that clearer and more consistent EU rules for on-farm animal welfare would help, to a large or very large extent, to ensure fairer conditions for farmers across Member States.

emissions. ([59]) Livestock generates GHG primarily through enteric fermentation (CH4) and manure management (CH4 and N2O), accounting respectively for 49% and 17% of agricultural emissions ([60]). Assigning also indirect emissions from feed production to livestock, as it is the case in a full life cycle assessment, further increases livestock's share in agricultural emissions. Among livestock species, bovines are the largest contributors, with beef production responsible for 37% and dairy for 19.8% of agricultural emissions. Pigs follow with 10.7%, poultry with 9.8%, and small ruminants (both meat and milk) with 6.2% ([61]).

Between 2005 and 2023, the EU's agricultural GHG emissions had an overall decreasing trend of 6,8%, with a further 1% reduction estimated between 2023 and 2024. In the same period, emissions from livestock decreased by 7.3%. Emission trends varied across Member States, with some of them seeing an increase in national agricultural GHG emissions since 2005.

Chart 18: evolution of GHG direct emissions



In the context of the national targets under the Effort Sharing Regulation (ESR) ([62]), Member States, overall, are projecting that, based on their current policies and measures, EU's agricultural emissions in 2030 would reach a level that is 10% below the 2005 baseline. If additional measures currently planned by Member States are implemented, the total reduction is projected to reach 13% below 2005 levels ([63]).

([59]) The EU climate policy framework maintains a regulatory separation between the agriculture and LULUCF sector based on IPCC accounting categories. In the EU's GHG inventory, agricultural emissions refer to non-CO2 emissions, primarily from fertiliser application, enteric fermentation and manure management. CO2 emissions and removals from soils, such as from cropland for feed production or grassland management, are attributed to the LULUCF sector. These emissions are not included in the cited share of 12.6%.

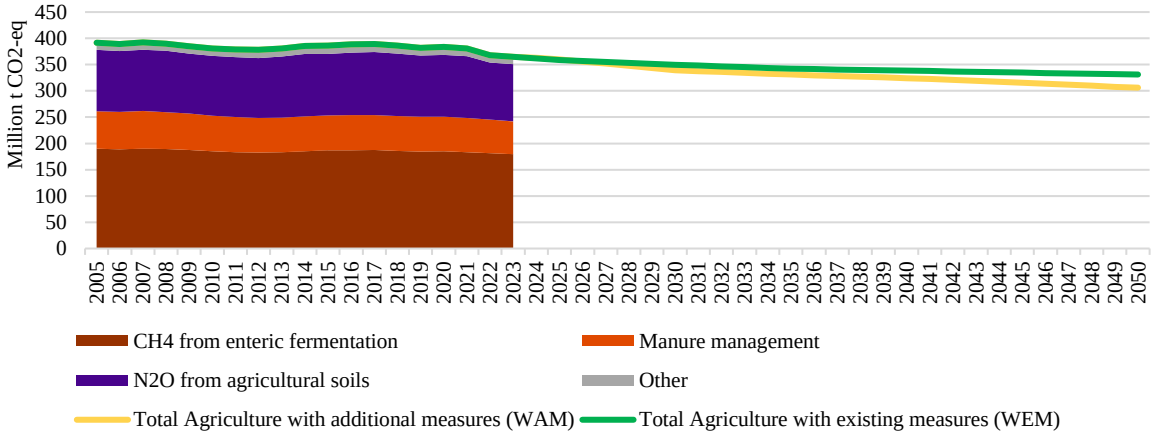
([60]) (European Environment Agency (EEA), 2025, Greenhouse gas emissions from agriculture in Europe, https://www.eea.europa.eu/en/analysis/indicators/greenhouse-gas-emissions-from-agriculture. Eurostat: Greenhouse gas emissions by source sector [env_air_gge]

([61]) Eurostat: Greenhouse gas emissions by source sector [env_air_gge]

([62]) Regulation (EU) 2018/842 of the European Parliament and of the Council of 30 May 2018 on binding annual greenhouse gas emission reductions by Member States from 2021 to 2030 contributing to climate action to meet commitments under the Paris Agreement and amending Regulation (EU) No 525/2013. OJ L 156, 19.6.2018, p. 26. ELI: http://data.europa.eu/eli/reg/2018/842/oj.

([63]) Eurostat (env_air_gge), European Environment Agency: greenhouse gas (GHG) emissions from agriculture in Europe.

Chart 19: EU agricultural emissions by source and projected emissions



Europe's livestock is increasingly exposed to climate risks. Increased temperatures and humidity, as well as new diseases and transmission pathways, are projected to negatively impact the health and productivity of livestock, especially in Southern Europe. Feed imports are vulnerable to climate events inside and outside Europe and price fluctuations are expected to increase.

The measures included by Member States in their National CAP Strategic Plans have the potential to significantly contribute to the targets under the ESR, with an estimated mitigation potential up to 31 million tonnes of CO2eq per year, mainly in carbon sequestration and reduction of emissions from soil. However, the estimated mitigation potential from livestock is low, highlighting room for additional emission reduction opportunities in the sector ([64]).

EU livestock systems also interact with emissions from crop- and grasslands which are accounted for in the LULUCF ([65]) sector, including carbon sequestration in grasslands, emissions and removals from crop land for feed production, as well as e.g. with emissions from the fertilizer industry (affecting the use of synthetic fertilisers), and with emissions in third countries, not only through the import of protein feed, but also through trade of livestock products.

Sustainable livestock systems are also relevant in the context of the Carbon Removals and Carbon Farming (CRCF) Regulation ([66]). Under the current agriculture and agroforestry on mineral soils methodology improved grassland management such as conversion of arable land for fodder crops to permanent grassland, rotational grazing and mixed swards can be certified. The Commission is currently assessing whether to expand the scope of the Regulation to livestock emission reductions from enteric fermentation and manure management. The management of permanent grasslands and adapted grazing regimes can help maintain or increase soil organic carbon stocks were supported by appropriate practices and monitoring. At the same time, improved manure management, optimised feeding strategies, enhanced herd efficiency and better nutrient management can contribute to reducing methane and nitrous oxide

([64]) DG AGRI - Report: Rough estimate of the climate change mitigation potential of the CAP Strategic Plans (EU-18) over the 2023-2027 period.

([65]) Land Use, Land-Use Change and Forestry (LULUCF).

([66]) Regulation (EU) 2024/3012 establishing a Union certification framework for permanent carbon removals, carbon farming and carbon storage in products. https://eur-lex.europa.eu/eli/reg/2024/3012/oj/eng.

emissions. Such climate-relevant practices can also deliver biodiversity co-benefits, including improved soil structure, enhanced habitat condition and increased pollinator support, provided that grazing intensity and nutrient balances remain within ecological limits.

Spatial distribution of livestock installations

Data from the Industrial Emissions Portal ([67]) provide a complementary perspective on the spatial concentration of pig and poultry confined production sites falling under the scope of the Industrial Emission Directive in the European Union. The installation location for reporting year 2024 ([68]) shows a strong geographical concentration of the 21 800 installations in a limited number of regions and could show some pattern despite some limitations ([69]). At NUTS2 level, the largest number of installations is recorded in Bretagne (1 493), Aragón (1 241), Weser-Ems (1 128), Noord-Brabant (971) and Cataluña (936). Other prominent clusters are found in Lombardia, Castilla y León, Midtjylland, Pays de la Loire, Veneto and Syddanmark. This pattern points to a marked concentration of intensive pig and poultry production in western France, parts of Spain, north-west Germany, the southern Netherlands, Denmark and northern Italy.

Nitrate pollution

Nitrate pollution from agricultural origins remains a significant concern for water quality within the EU. Agricultural practices, particularly high concentration of livestock in certain areas, low feed self-sufficiency and overfertilization contribute notably to nitrate pollution and imbalanced nitrogen cycles. Livestock production accounts for approximately 81% of agricultural nitrogen input into aquatic systems ([70]). Nutrient pollution significantly impacts 31% of surface water bodies and 17% of the area of groundwater bodies ([71]) under the Water Framework Directive ([72]).

Groundwater is defined as polluted when nitrate concentrations surpass 50 mg/l, and 13.3% of EU monitoring stations have reported levels exceeding this threshold. Agriculture is the primary source of nitrates entering groundwater bodies. Additionally, nitrate pollution plays a critical role in the eutrophication of freshwater and marine waters, leading to adverse effects on aquatic ecosystems. In the period 2020-23, 52% of monitoring stations in the EU indicate water affected

([67]) Data source EEA 2024: Industrial Emissions European Industrial Emissions Portal . Dataset download: https://sdi.eea.europa.eu/data/657ac3cb-affa-4295-a4a9-27b4f539adab , 24/03/2026.

([68]) The IED installations dataset identifies the location and regulatory status of installations falling under Annex I of the Industrial Emissions Directive and, for livestock, covers the three main intensive livestock categories included under point 6.6, namely poultry installations with more than 40 000 places, pig installations with more than 2 000 places for production pigs over 30 kg, and sow installations with more than 750 places.

([69]) The limitations of the dataset should be acknowledged. First, the IED dataset does not represent all livestock farms, but only installations covered by the directive above the relevant capacity thresholds. It therefore captures large units rather than the full livestock population. Second, the data reflect reported installations and their reported status, not production volumes or animal numbers. Finally, the dataset is best interpreted as a map of reported intensive livestock installations rather than as a complete inventory of all intensive livestock production sites.

([70]) Report from the Commission to the Council and the European Parliament on the implementation of Council Directive 91/676/EEC concerning the protection of waters against pollution caused by nitrates from agricultural sources based on Member State reports for the period 2016–2019.

([71]) Water Framework Directive experts dashboards | WISE Freshwater resource catalogue | WISE Freshwater

([72]) Directive - 2000/60 - EN - Water Framework Directive - EUR-Lex

by eutrophication. The risk of nitrate pollution is particularly acute in intensively farmed areas characterised by high nitrogen surpluses. These are often also areas with high livestock density, as intensive livestock production is a driver of general agricultural intensification (excess manure, feed production). The ongoing analysis regarding the implementation of the EU Nitrates Directive ([73]) will provide further insights into regional variations and trends concerning nitrate pollution, emphasising its continued importance as an environmental issue.

Livestock is an important source of nutrient surplus. In regions where livestock concentration is high, the large manure production is associated with high risks of ammonia emissions to the air and nitrates and phosphorus losses to water. The very high livestock concentration in a few regions of the EU have resulted in nutrient hotspots or nutrient intensive areas, with high levels of pollution in the air and in water.

Some Member States characterised by high concentration of livestock are implementing State Aid schemes to decrease livestock numbers in order to reduce its environmental footprint, including in N2000 sites.

Ammonia emissions

The agricultural sector is the predominant source of ammonia emissions in the EU, contributing approximately 90% of the total emissions. Ammonia emissions have a negative impact on human health as the emissions contribute to fine particulate matter ($PM_{2.5}$) concentrations, via the formation of secondary particles, including in many EU urban areas due to longe-range atmospheric transport ([74]). Ammonia has also a direct impact on ecosystems and vegetation causing eutrophication and soil acidification. Within the agricultural sector, livestock farming and the use of fertilisers are identified as the major contributors. Specifically, ammonia emissions arise from various activities such as animal manure application to soils, inorganic nitrogen fertilisers, improper manure management and storage for different types of livestock, and urine and dung deposited by grazing animals.

Despite efforts made to address this issue, many EU Member States remain challenged in meeting the ammonia emission reduction commitments set for 2030 under the National Emission reduction Commitments (NEC) Directive ([75]). Although there has been a reduction in the number of Member States not complying with their 2020 commitments (from 11 in 2020 to 5 in 2023), projections for 2030 indicate that 15 Member States are expected to fall short of their targets unless further actions are undertaken ([76]). In 2023, the risk of eutrophication on

([73]) Nitrates - Environment - European Commission

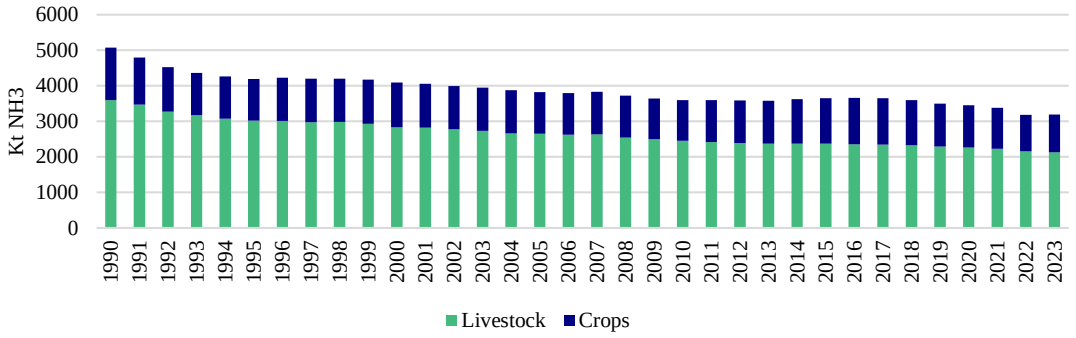
([74]) The average contribution from agriculture in 150 urban areas in the EU is 15%, as shown in the 2025 Urban $PM_{2.5}$ Atlas prepared by the JRC: THUNIS, P., PISONI, E., ZAULI SAJANI, S., DE MEIJ, A., REY POMMIER, A. et al., Urban PM2.5 Atlas Air Quality in European Cities, 2025 Report, Publications Office of the European Union, Luxembourg, 2025, https://data.europa.eu/doi/10.2760/3872483, JRC143618.

([75]) Directive (EU) 2016/2284 of the European Parliament and of the Council of 14 December 2016 on the reduction of national emissions of certain atmospheric pollutants, amending Directive 2003/35/EC and repealing Directive 2001/81/EC

([76]) https://www.eea.europa.eu/en/analysis/publications/air-pollution-in-europe-2025-reporting-status-under-the-national-emission-reduction-commitments-directive/magnitude-of-emission-reductions-percentage-required-by-eu-member-states-to-meet-their-emission-reduction-commitments-for-2030-onwards-based-on-2023-data

terrestrial and aquatic ecosystems due to nitrogen deposition, mainly caused by ammonia, remains high in some areas in Europe ([77]).

Chart 20: Ammonia (NH3) emissions from agriculture



Grassland and livestock dynamics, including biodiversity aspects

European grasslands cover about one third of farmland which breaks down into roughly 51 million ha of permanent grassland and 7 million ha of temporary grassland. After a decline in permanent grassland until the year 2000, the EU grassland area has since remained broadly stable in total area. This apparent stability in EU-wide statistics hides important local changes and dynamics at territorial level, also influenced by the sources of data and analysis ([78]).

A substantial proportion of Europe's semi-natural grasslands are listed as habitats of EU interest under Annex I of the Habitats Directive ([79]), requiring Member States to protect and manage them within Natura 2000 sites. One third of habitats of EU interest, approximately 4.5% of the EU's terrestrial area (177 442 km²), depend on active agricultural management, primarily extensive grazing by cattle, sheep, goats and/or horses. In the EU, 84% of such grazing-dependent habitats are currently in unfavourable conservation status, with grasslands showing the highest proportion of deteriorating trends. These include several ecosystems targeted by the Nature Restoration Regulation ([80]). The first pressure affecting these habitats is related to changes in agricultural management (e.g. intensification, abandonment of extensive grassland management, under-grazing or intensive grazing ([81])). This highlights both the ecological importance and the structural vulnerability of these habitats as well as the need for sustainable grazing in maintaining them.

Grassland ecosystems require an active agricultural management, and extensive animal grazing provides the most effective nature-based way to undertake this. Grazing intensity is a key factor shaping grassland health ([82]). Sustainable management in these settings implies that grazing

([77]) Eutrophication caused by atmospheric nitrogen deposition in Europe | Indicators | European Environment Agency (EEA)

([78]) Agricultural Analytical Brief N° 13: Grassland and livestock dynamics

([79]) Council Directive 92/43/EEC of 21 May 1992 on the conservation of natural habitats and of wild fauna and flora. ELI: http://data.europa.eu/eli/dir/1992/43/2013-07-01

([80]) Regulation (EU) 2024/1991 of the European Parliament and of the Council of 24 June 2024 on nature restoration and amending Regulation (EU) 2022/869. ELI: http://data.europa.eu/eli/reg/2024/1991/oj

([81]) State of nature in the EU Results from reporting under the nature directives 2013-2018, https://www.eea.europa.eu/en/analysis/publications/state-of-nature-in-the-eu-2020, p72-73.

([82]) Agricultural Analytical Brief N° 13: Grassland and livestock dynamics

pressure remains within ecological carrying capacity, as both overgrazing and land abandonment can undermine habitat conditions. Light to moderate grazing with low fertiliser inputs helps maintain productive and biodiverse grasslands while also supporting rural livelihoods, animal welfare and cultural landscapes. Where grazing is abandoned, grasslands are rapidly encroached by shrubs and trees, resulting in the loss of open-habitat species and an increased risk of wildfires. Grazing, together with silvopasture and agroforestry, are in fact critical in reducing natural hazards by keeping the amount of vegetation biomass at low levels, as acknowledged in the recent Wildfire Communication ([83]). Conversely, overgrazing damages soils, reduces plant diversity, and weakens grassland resilience, while under-grazing or abandonment leads to uniform, overgrown vegetation and biodiversity decline.

Fertiliser input is another critical determinant of grassland biodiversity. High-nature-value grasslands - characterised by high diversity of plants, insects and birds require management systems with very low external fertiliser inputs. Increased fertilisation reduces plant species diversity and raises biomass productivity, which in turn necessitates more frequent mowing or higher grazing intensity. These changes further accelerate biodiversity loss associated with grassland intensification. Similarly, in productive lowland areas used for livestock production, grasslands are often intensified or even converted to other land uses ([84]). Ensuring that agricultural viability and biodiversity maintenance go hand in hand is essential towards effective implementation of EU nature and agricultural policies.

Livestock numbers on grassland-based farms have fallen sharply in recent decades, especially in extensive systems in mountains and other marginal areas. Many small and mixed farms have disappeared due to weaker economic viability, reducing the number of animals that actively manage grasslands. This decline has major consequences for biodiversity, because grazing animals are not easily replaced by machines or natural processes, and the abandonment of these territories across Europe is a main concern for policy makers at different levels. With regard only to the management of Annex I habitats that depend on grazing, the European Environment Agency estimates that approximately 10–15% of the current ruminant livestock population in the EU would be sufficient to preserve these habitats if suitably distributed (EEA, 2026). But the extensive systems that provide these environmental benefits are in long-term decline, and there is a growing mismatch between where livestock are raised and where grazing is needed, in ecosystems often located in more marginal or remote regions.

While larger and more intensive livestock farms can be economically stronger, they often rely less on grazing and more on housed systems and imported feed, weakening the link between animals and local land ecosystems. Also, there is a tendency for livestock farming to concentrate in a few specialised regions, resulting in the intensification of environmental pressures there. In this context, it is also worth mentioning that Nitrogen deposition emitted by livestock, especially in areas where livestock density is high, contributes to biodiversity loss and degradation of both aquatic and terrestrial natural and semi-natural ecosystems. Reducing these and other drivers of degradation is a prerequisite for nature conservation and restoration.

([83]) Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on integrated wildfire risk management. COM/2026/330 final

([84]) Agricultural Analytical Brief N° 13: Grassland and livestock dynamics

The biodiversity impacts of livestock production are not limited to grassland management. Feed production can be a valuable component of crop rotation with positive impacts on circularity, but also a main driver of biodiversity losses.

Evidence on livestock-related farming practices and environmental impacts

In transitioning to sustainable and resilient livestock systems, scientific evidence on the environmental effects of farming practices can inform about effective ways to reduce pressures and to have positive impacts on the environment. The JRC Farming practices Evidence Library (FPEL)([85]),([86]) can serve this purpose as a collection of 630 meta-analysis ([87]), published from 2007 and 2024, on the impact of farming practices on the environment.

Additional scientific guidance on mitigation measures and best practices to reduce ammonia emissions from livestock can also be found in two key UNECE documents: Guidance document on preventing and abating ammonia emissions from agricultural sources([88]) and the Framework Code for Good Agricultural Practice for Reducing Ammonia Emissions([89]).

Key livestock practices to reduce ammonia emissions, GHG emissions and nutrient losses

The JRC FPEL includes synthetised results from 83 meta-analyses covering livestock feeding, housing techniques and manure management showing that various practices can reduce environmental pressures compared to conventional practices. The adoption of these practices holds significant potential to reduce environmental pressures, particularly through GHG emissions, ammonia emissions and nutrient losses to soils and water, while sustaining or even improving animal productivity.

Among 98 livestock feeding techniques, several have consistently positive effects on specific environmental outcomes. Effects vary by livestock type, experimental setup, and technique characteristics ([90]). However, for an effective transition, an increased uptake of these practices needs to be combined with addressing structural issues such as high livestock numbers and concentration of intensive systems with high stocking densities.

Based on the analysed 83 meta-analyses, the following practices are shown to have a beneficial effect in more than 75% of the meta-analyses evaluated. Ammonia emissions can be reduced in the barn by optimising livestock diet, in particular by adopting a low crude protein diet for swine, poultry and ruminants farming and improving housing conditions for these type of

([85]) JRC - Farming Practices Evidence library, The JRC farming practices evidence library, Publications Office of the European Union, 2025, https://data.europa.eu/doi/10.2760/9473570

([86]) Schievano, A., Pérez-Soba, M., Bosco, S. et al. Evidence library of meta-analytical literature assessing the sustainability of agriculture – a dataset. Sci Data 11, 979 (2024). https://doi.org/10.1038/s41597-024-03682-6

([87]) A meta-analysis is a systematic statistical synthesis of the results of many independent individual experiments.

([88]) Guidance document on preventing and abating ammonia emissions from agricultural sources published in 2012, recently revised and subject to final approval , draft revision of the Guidance

([89]) Framework Code for Good Agricultural Practice for Reducing Ammonia Emissions

([90]) Bosco, S., Chen, M., Bielza, M., Montero Castano, A., Schievano, A. et al., Livestock Feeding and Sustainability: Mapping Environmental, Climate, and Productivity Outcomes, Publications Office of the European Union, Luxembourg, 2025, https://data.europa.eu/doi/10.2760/3398918, JRC143817. JRC Publications Repository - Livestock Feeding and Sustainability: Mapping Environmental, Climate, and Productivity Outcomes.

animals([91]). Manure storage with acidification([92]), use of cover, additives or biofilters and land application with deep placement can reduce ammonia emissions ([93]). GHG emissions: methane emissions from enteric fermentation may be reduced through an increased use of oils and fats in the diet, with specific additives (nitrate, 3-nitrooxypropanol), and by using techniques for rumen manipulation ([94]). From manure management, this kind of emissions may be reduced with solid-liquid separation and storage with cooling. Nitrous oxide emission from manure management may be reduced with storage with acidification or the use of storage with microbial inoculate. Anaerobic digestion and storage with additives can help reduce the overall GHG emissions ([95]). Nutrient excretion and nutrient recovery: A low crude protein diet can reduce nitrogen excretion of swine ([96]) and poultry ([97]), as well as the use of urea as additive in the diet. Manure storage with cover, additives and microbial inocula can reduce nitrogen losses ([98]).

Environmental impacts of extensive livestock systems

Locally adapted farming practices of extensive livestock systems can maintain or restore biodiverse habitats, by resembling historical disturbance regimes by wild herbivores. With adequate support, these systems can offer livestock production capacities in currently abandoned and under-grazed areas. Based on a systematic review of 74 meta-analyses, the JRC FPEL synthetises scientific evidence on the effects of grassland management, conservation and restoration, and grazing. Conservation of old successional natural grasslands increases carbon sequestration and grassland restoration has positive effects on several environmental indicators. Restoration of grasslands degraded by former agricultural use have been shown to increase biodiversity, carbon sequestration, reduce GHG emissions, and reduce nutrient losses.

Grazing can have a positive effect on biodiversity, but it depends on the intensity. The impacts of grazing on biodiversity in general and for plant biodiversity change from significantly positive, i.e. increasing biodiversity under light grazing intensity ([99]) to significantly negative

([91]) Emmerling, C., Krein, A., & Junk, J. (2020). Meta-analysis of strategies to reduce NH3 emissions from slurries in European agriculture and consequences for greenhouse gas emissions. Agronomy, 10(11), 1633.

([92]) Co-mitigation of methane and ammonia emissions from agricultural sources: policy brief and guidance

([93]) Ti, C., Xia, L., Chang, S. X., & Yan, X. (2019). Potential for mitigating global agricultural ammonia emission: a meta-analysis. Environmental Pollution, 245, 141-148.

([94]) Arndt, Claudia, et al. "Full adoption of the most effective strategies to mitigate methane emissions by ruminants can help meet the 1.5 C target by 2030 but not 2050." Proceedings of the National Academy of Sciences 119.20 (2022): e2111294119.

([95]) Miranda, N. D., Tuomisto, H. L., & McCulloch, M. D. (2015). Meta-analysis of greenhouse gas emissions from anaerobic digestion processes in dairy farms. Environmental science & technology, 49(8), 5211-5219.

([96]) Wang, H., Long, W., Chadwick, D., Velthof, G. L., Oenema, O., Ma, W., ... & Zhang, F. (2020). Can dietary manipulations improve the productivity of pigs with lower environmental and economic cost? A global meta-analysis. Agriculture, Ecosystems & Environment, 289, 106748.

([97]) De Rauglaudre, T., Méda, B., Fontaine, S., Lambert, W., Fournel, S., & Létourneau-Montminy, M. P. (2023). Meta-analysis of the effect of low-protein diets on the growth performance, nitrogen excretion, and fat deposition in broilers. Frontiers in Animal Science, 4, 1214076.

([98]) Zhao, S., Schmidt, S., Qin, W., Li, J., Li, G., & Zhang, W. (2020). Towards the circular nitrogen economy–A global meta-analysis of composting technologies reveals much potential for mitigating nitrogen losses. Science of the Total Environment, 704, 135401.

([99]) The impacts of grazing intensity are assessed by considering different grazing intensities: light, moderate and heavy as intervention. Intensities are taken from the reviewed meta-analyses as reported by authors, based on their

under heavy grazing intensity. Grazing with low intensity has been shown to improve biodiversity (of arthropods and birds) and pollinators in more than 75% of the meta-analyses ([100, 101]). Extensive grazing can increase also carbon sequestration, soil quality, grassland productivity and benefitting pollinators and weed control. Grazing at higher intensities has negative impacts on the environment and on production. Grazing overall, and particularly at heavy and intensive levels, has been associated with negative impacts on carbon sequestration, grassland production, soil physio-chemical quality, soil nutrients, and soil water retention. Rotational grazing is beneficial for both carbon sequestration and grassland production. Rotational grazing (grazing regimes with planned rest periods) has been found to increase animal production per hectare, grass biomass production, ground cover and forage yield and soil organic carbon content, compared to continuous grazing ([102, 103]). These benefits are more pronounced with increasing length of resting time. The effects of decision between different management practices such as grazing or mowing and intensity/frequency levels and mowing dates depend on local conditions. Based on the meta-analyses, the effects of grazing and mowing practices depend on several biological (type of livestock, vegetation, soil biota), environmental (e.g. soil, slope), climatic factors and on the type, duration of the treatment, mowing date and historical management.

In addition, integration of livestock and crop production, such as in organic mixed farming systems and silvopastoral agroforestry systems, has several positive effects, also shown by the JRC FPEL, including 28 relevant meta-analyses. Silvopastoral systems can increase the carbon sequestration in soil and in above-ground biomass, increase the biodiversity of arthropods, vertebrates and woody plants and soil water retention. Organic livestock/ mixed crop-livestock systems are shown to increase carbon sequestration in the soil (based on six meta-analyses).

Key livestock practices with potential for co-benefits

From the practices discusses above, the ones that have multiple positive effects (co-benefits) on environmental and climate impacts or on production have been identified in the following table.

assessments, without any further classification. These interventions are compared to no grazing or other grazing intensity as comparator.

([100]) Sartorello, Ylenia, et al. "The impact of pastoral activities on animal biodiversity in Europe: A systematic review and meta-analysis." Journal for Nature Conservation 56 (2020): 125863.

([101]) Herrero-Jáuregui, Cristina, and Martín Oesterheld. "Effects of grazing intensity on plant richness and diversity: A meta-analysis." Oikos 127.6 (2018): 757-766.

([102]) McDonald, Sarah E., et al. "Ecological, biophysical and production effects of incorporating rest into grazing regimes: a global meta-analysis." Journal of Applied Ecology 56.12 (2019): 2723-2731.

([103]) Byrnes, Ryan C., et al. "A global meta-analysis of grazing impacts on soil health indicators." Journal of environmental quality 47.4 (2018): 758-765.

Farming practice	Intervention	Air pollutants emissions	Animal production	Anti-microbial resistanceÂ	Biodiversity	Carbon sequestration	Ecotoxicity (LCA)	Farming system productivity	GHG emissions	Global warming potential (LCA	Grassland production	Nutrient excretion	Nutrients recovery	Pollination	Soil nutrients	Soil physico-chemical quality	Soil water retention
Agroforestry practices and systems	Silvopastoral systems				■	■		■							■	■	■
Grazing management	Low grazing intensity				■									■			
Grazing management	Rotational grazing		■			■					■						
Livestock feeding techniques	3-nitrooxypropanol		■						■								
Livestock feeding techniques	Diet formulation		■						■								
Livestock feeding techniques	Electron sinks		■						■								
Livestock feeding techniques	Low crude protein diet	■										■					
Livestock feeding techniques	Oilseeds		■						■								
Livestock feeding techniques	Rumen manipulation		■						■								
Livestock feeding techniques	Urea		■							■		■					
Manure processing techniques	Anaerobic digestion			■			■		■	■							
Manure storage techniques	Storage covers	■											■				
Manure storage techniques	Storage with acidification	■							■								
Manure storage techniques	Storage with additives	■							■				■				
Manure storage techniques	Storage with microbial inocula	■							■				■				

Livestock value chains and bioeconomy

Livestock value chains play a pivotal role in the EU bioeconomy, contributing significantly to its economic fabric. In 2023 ([104]), these value chains generated an approximate value added of EUR 256 billion, which represents about 30% of the total biomass producing and converting activities in the EU, valued at EUR 863 billion. This underscores the substantial economic impact of livestock-related activities, which encompass primary production, food-product manufacturing, leather production, and bio-based chemicals and pharmaceuticals. Over the past decade, the value added by livestock-related activities has grown from EUR 150 billion in 2013 to EUR 256 billion in 2023, with notable expansions in chemicals and pharmaceuticals, which more than doubled, and steady growth in primary production and food-product manufacturing.

The largest contributions to livestock value chains come from Germany, France, and Italy, each generating more than EUR 30 billion. Spain, the Netherlands, and Poland also make significant contributions, each adding around EUR 14-29 billion. The share of livestock-related value added relative to total biomass-producing and transforming activities varies markedly across Member States, ranging from under 10% to over 40%. Countries with high specialization in livestock value chains, such as Ireland, Denmark, and Cyprus, derive a substantial proportion of their bio-based value added from these activities. Other Member States fall into two main patterns: those with strong agri-food sectors where livestock underpins primary production and food processing, and those with advanced downstream processing combined with traditional livestock streams, particularly in bio-based chemicals and pharmaceuticals.

The integration of livestock-related streams within different bio-based value chains highlights their importance in supporting food production, material manufacturing, and emerging bio-based chemical markets.

([104]) Lasarte-López, J., M'barek, R. *Contribution of livestock value chains to the bioeconomy sectors in the EU*. European Commission, Seville, 2026, JRC146560.

Possible options to reduce emissions and mitigate environmental impacts

Reducing air pollution and GHG emissions and mitigating environmental impacts while maintaining economic viability and competitiveness faces significant challenges. However, there are potential avenues to achieve these goals.

Technological measures play a crucial role in mitigating emissions from the livestock sector. DG AGRI's internal modelling and assessments highlight the potential of feed additives (like 3NOP), low-nitrogen feeding strategies, and anaerobic digestion to reduce methane emissions significantly. For instance, the use of 3NOP feed additive can reduce methane emissions from enteric fermentation by around 30% for dairy cows and 11-15% for total GHG emissions ([105]). Similarly, anaerobic digestion and low ammonia application measures can contribute to substantial emission savings, with DG AGRI's assessments indicating a potential reduction of 42.2 million tonnes of CO2 equivalents through technological measures. These technologies can enhance emission efficiency without substantially increasing import demand, thereby minimizing emission leakage. The adoption of such measures is essential for improving the sector's competitiveness while reducing its climate footprint. However, the cost of adoption accrues to farmers, which may impact their competitiveness and require additional policy support to incentivize widespread implementation.

The CAP, current and future, contains a 'green architecture' that integrates environmental and climate sustainability objectives through a combination of mandatory and voluntary policy tools. This framework supports sustainable farming practices, such as eco-schemes, agri-environmental and climate commitments. Data show a clear trend of declining agricultural GHG emissions across multiple categories within IPCC sector 3, likely driven by improved farming practices and better implementation of sustainability measures –data signal a successful decoupling of GHG emissions from production intensity in EU agriculture over recent years. Also, the post 2020 divergence between emissions and economic output highlights that an increase in economic value of the agricultural sector does not mean an increase in GHG emissions across the industry ([106]).

The CAP's focus on productivity and environmental performance offers a balanced approach. Scenario analyses indicate that achieving better environmental performance may in some cases come with increased budget expenditure and additional costs for consumers and lower input costs for farmers. Improving the environmental performance of farms may increase resilience. However, the environmental benefits are significant, including reductions in nitrogen surplus, ammonia emissions, and GHG emissions, particularly when combined with technological advancements and sustainable farming practices.

Reducing livestock density is another potential avenue to mitigate environmental impacts. The 2022 agricultural outlook report ([107]) analyses scenarios where maximum livestock density is lowered to certain levels, inspired by ongoing policy discussions in some EU countries. These scenarios indicate that reducing livestock density can lead to a decrease in ammonia emissions and nitrates leaching, particularly in high livestock density regions. For example, scenarios modelling a reduction in livestock density to 1.4 LSU/ha UAA at the grid level can reduce the EU average nitrogen surplus by 6-12% and ammonia emissions by 6-11%. However, the report

([105]) DG AGRI assessment

([106]) DG AGRI assessment

([107]) https://agriculture.ec.europa.eu/document/download/a353812c-733e-4ee9-aed6-43f8f44ca7f4_en?filename=agricultural-outlook-2023-report_en_0.pdf

also highlights the risk of emission leakage, where reduced EU production leads to increased imports and higher emissions in non-EU regions. To address this, parallel policies targeting emission efficiency, dietary changes, or trade flows would be necessary. The use of feed additives like 3NOP can further enhance the effectiveness of these measures, contributing to a more substantial reduction in methane emissions and overall GHG emissions. For instance, the combination of reduced livestock density with the use of 3NOP can increase the net global GHG reduction from less than 2% to 5-7%, depending on the dose of 3NOP used.

Changes in consumption patterns, particularly a shift towards more plant-based diets, can also significantly impact air pollution and GHG emissions. Even moderate dietary changes can lead to substantial emission reductions. For example, a moderate decline in meat and dairy consumption by 6kg/capita and 10% respectively can result in significant GHG emission reductions ([108]). This approach not only reduces demand for animal products but also promotes a more export-oriented EU livestock sector. However, achieving such dietary shifts would require comprehensive policy measures to incentivize consumers and support the agricultural sector in adapting to changing market dynamics.

In conclusion, reducing emissions and environmental impacts from the livestock sector requires a multifaceted approach that combines the CAP's green architecture, adoption by farmers of more environmentally sustainable practices and/or technological advancements, production adjustments, and changes in consumption patterns. The CAP's measures provide a solid foundation for sustainable farming practices, while technological innovations offer practical solutions to enhance emission efficiency. Reducing livestock density and promoting dietary changes are alternative avenues.

CHAPTER IV: THE POLICY CONTEXT

The current CAP

The CAP 2023-27 sets ambitious objectives aligned with the EU's goals for social, environmental, and economic sustainability in agriculture and rural areas. The current CAP framework ([109]) supports the development of a more competitive, resilient and sustainable livestock sector. Each EU Member State has developed a national CAP Strategic Plan

([108]) DG AGRI assessment

([109]) Regulation (EU) 2021/2116 of the European Parliament and of the Council of 2 December 2021 on the financing, management and monitoring of the common agricultural policy and repealing Regulation (EU) No 1306/2013. ELI: http://data.europa.eu/eli/reg/2021/2116/oj

Regulation (EU) 2021/2115 of the European Parliament and of the Council of 2 December 2021 establishing rules on support for strategic plans to be drawn up by Member States under the common agricultural policy (CAP Strategic Plans) and financed by the European Agricultural Guarantee Fund (EAGF) and by the European Agricultural Fund for Rural Development (EAFRD) and repealing Regulations (EU) No 1305/2013 and (EU) No 1307/2013. ELI: http://data.europa.eu/eli/reg/2021/2115/oj

Regulation (EU) 2021/2117 of the European Parliament and of the Council of 2 December 2021 amending Regulations (EU) No 1308/2013 establishing a common organisation of the markets in agricultural products, (EU) No 1151/2012 on quality schemes for agricultural products and foodstuffs, (EU) No 251/2014 on the definition, description, presentation, labelling and the protection of geographical indications of aromatised wine products and (EU) No 228/2013 laying down specific measures for agriculture in the outermost regions of the Union. ELI: http://data.europa.eu/eli/reg/2021/2117/oj

(CSP) ([110]) that combines funding for income support, rural development, and sectoral interventions.

Basic income support for sustainability (BISS), as area-based support, extends to all land-based agricultural sectors, including livestock farming. Livestock production systems with no eligible land are not benefiting from BISS. Livestock farmers also potentially benefit from various CAP payments, such as coupled income support (CIS), eco-schemes (including animal welfare), complementary redistributive income support for sustainability (CRISS), and rural development support, provided through grants and/or financial instruments. This support includes payments for areas with natural constraints, including ANC in mountain areas, agri-environmental-climate payments, investments, cooperation, risk management, knowledge transfer and advisory services, where applicable. A significant portion of these funds is directed toward manure storage and processing and grassland management. Additionally, through their CSP, many Member States offer support to livestock farmers for upgrading farm buildings and equipment, including for environmental reasons, to increase animal welfare standards and support the conservation of rare breeds.

A substantial share of CIS funding (around 70%) is allocated directly to ruminant livestock sectors which are under specific economic difficulties and financial constraints. Some CIS interventions directed towards crops, particularly protein crops (about 13% of CIS financial allocation), may also in some cases directly and indirectly benefit the livestock farms and sectors. Some CSP incorporate specific eligibility criteria to their CIS support to ruminants such as livestock density limitations, territorial targeting (mountains, alpine pastures...) or endangered/mixed breeds. Livestock farms not producing crops, notably in the pig and poultry sectors, receive no area-based payments. This is not the case where farms combine livestock production with crop cultivation on land eligible for direct support. Pigs and poultry are excluded from CIS animal-based payments. Farmers, including those in livestock production, are potentially eligible for investment support aimed at restructuring, modernization, and enhancing competitiveness. For example, granivores and dairy farms are major beneficiaries of CAP investment support.

A significant part of CAP interventions in the environment, climate and animal welfare domains address livestock farming and its interaction with natural resources. At the interfaces between livestock and grasslands the current CAP introduced a range of instruments such as the GAEC standards (Good Agriculture and Environmental Conditions, part of the conditionality mechanism), eco-schemes (annual climate/environment payments from EAGF), agri-environment-climate commitments (AECC from EAFRD) and support for areas with natural or other area-specific constraints (ANC). Evidence from an internal AGRI analysis of Member States' CAP Strategic Plans on interventions governed by Articles 31 (Eco-Schemes) and 70 (Agri-Environmental-Climate Commitments) reveals that the CAP toolbox has the necessary instruments to support grass-based livestock farming, but their implementation oftentimes needs stronger coherence and a more strategic ambition ([53]). About two-thirds of all grassland-related eco-schemes and a significant portion of AECC promote grazing in one form or another.

([110]) Regulation (EU) 2021/2115 of the European Parliament and of the Council of 2 December 2021 establishing rules on support for strategic plans to be drawn up by Member States under the common agricultural policy (CAP Strategic Plans) and financed by the European Agricultural Guarantee Fund (EAGF) and by the European Agricultural Fund for Rural Development (EAFRD) and repealing Regulations (EU) No 1305/2013 and (EU) No 1307/2013. ELI: http://data.europa.eu/eli/reg/2021/2115/oj

The integration of these measures is though often limited, and so is their impact on sustainable grassland management.

Through strategic use of existing tools, and a more territorial and targeted approach, the CAP can more effectively maintain grassland ecosystems and the livestock farmers who steward them ([111]). Other measures within the CAP framework, specifically under the basis of the Common Market Organisation (CMO) Regulation ([112]) include measures aimed at strengthening farmers' positions within the agri-food supply chain, market transparency, and the protection against certain harmful unfair trading practices ([113]). They are for the benefit of all farmers, including livestock ones.

The expansion of producer organisations (POs) could play a significant role in increasing their bargaining power. By channelling EU financial support and implementing Sectoral Interventions ([114]), POs not only restructure and augment the sector's competitiveness, but also contribute to environmental conservation and adaptation and risk and crisis management.

In the first year of CAP 2023-2027 implementation (claim year 2023), 4 billion euro was specifically allocated to interventions paid per head of animal or livestock unit (corresponding to 10% of the total CAP funds) ([115]). Of this amount, three-quarters was distributed as coupled income support, while 16% was allocated to eco-schemes targeting animal welfare and 9% was directed towards animal welfare interventions supported under “Environmental, climate-related and other management commitments”. Coupled income support is the main type of intervention for livestock in most EU Member States. However, there are two notable exceptions, Ireland and the Netherlands, where no such support is provided for livestock. Meanwhile, Austria and Italy allocate the largest share of support to livestock via eco-schemes for animal welfare (respectively 44% and 57%).

In 2023, 60% of livestock farms benefitted from rural development support. Half of the livestock farms received support for natural constraints related to area, 27% for commitments for environmental and climate payments and 11% for animal welfare. Additionally, 6% of livestock farms received support for investments ([116]).

([111]) DG AGRI, 2026. Analytical Brief N° 13: Grassland and livestock dynamics

([112]) Regulation (EU) No 1308/2013 of the European Parliament and of the Council of 17 December 2013 establishing a common organisation of the markets in agricultural products and repealing Council Regulations (EEC) No 922/72, (EEC) No 234/79, (EC) No 1037/2001 and (EC) No 1234/2007. ELI: http://data.europa.eu/eli/reg/2013/1308/oj

([113]) Directive (EU) 2019/633 of the European Parliament and of the Council of 17 April 2019 on unfair trading practices in business-to-business relationships in the agricultural and food supply chain. ELI: http://data.europa.eu/eli/dir/2019/633/oj

([114]) Interventions in certain sectors under the CAP Strategic Plans financed through the EAGF. The interventions are foreseen in the following sectors: fruit and vegetables, apiculture, wine, hops, olive oil and table olives and other sectors (Art. 42(f) Reg. 2021/2115).

([115]) DIB (Data on interventions and beneficiaries). Further details are available in the DIB guidelines. Data are under review and currently unavailable for Greece. interventions paid per area targeting livestock farms based on eligibility criteria are not taken into account.

([116]) Eurostat IFS (ef_rd_leg). Above threshold.

The EU promotion policy ([117]) supports the livestock sector by cofounding agri-food promotion programmes targeting the internal market and countries outside the EU. Between 2023 and 2025, an average of 47% of the total amount granted to promotion programmes financed programmes promoting meat or dairy products. 43% of these funds supported the promotion of organic, sustainable and quality schemes production.

Under the current CAP (2023–2027), Member States have flexibility to include animal health related measures, such as biosecurity, within their National Strategic Plans (NSPs) on a voluntary basis, typically under broader interventions rather than as a dedicated requirement. 10 Member States were recommended to add biosecurity in their NSPs to, later this recommendation was extended through observation letters to 15 Member States in light of the African swine fever situation or associated risks. While the majority of these Member States (12 out of 15) subsequently introduced relevant CAP-based interventions on biosecurity (mainly investments on infrastructures in pig farms, advisory services and awareness measures), biosecurity is still often addressed indirectly and without dedicated indicators. Overall, the uptake of animal health related measures can be characterised as limited to modest.

Measures beyond the CAP

Beyond the Common Agricultural Policy (CAP), State Aids and several EU policies significantly influence the sustainability and competitiveness of the EU livestock sector. The primary focus areas are environmental and climate policies, including water and soil management policies and animal health and animal welfare legislation.

Current EU policies aimed at reducing greenhouse gas emissions, improving resource efficiency, and promoting circular economy, as well as measures addressing water and soil management, including regulations on nutrient runoff and manure management, are highly relevant to the EU livestock sector. These include in the Water Framework Directive ([118]), the Nitrates Directive ([119]), the Industrial Emissions Directive ([120]), the National Emission Reduction Commitments (NEC) Directive ([121]) and the Birds and Habitats Directives, which together aim to ensure the livestock sector operates within sustainable boundaries. Some of these requirements are included in the CAP through SMRs, while obligations arising from the

([117]) Regulation (EU) No 1144/2014 of the European Parliament and of the Council of 22 October 2014 on information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries and repealing Council Regulation (EC) No 3/2008. ELI: http://data.europa.eu/eli/reg/2014/1144/oj

([118]) Directive 2000/60/EC of the European Parliament and of the Council of 23 October 2000 establishing a framework for Community action in the field of water policy. ELI: http://data.europa.eu/eli/dir/2000/60/oj

([119]) Council Directive 91/676/EEC of 12 December 1991 concerning the protection of waters against pollution caused by nitrates from agricultural sources. ELI: http://data.europa.eu/eli/dir/1991/676/oj

([120]) Directive 2010/75/EU of the European Parliament and of the Council of 24 November 2010 on industrial emissions (integrated pollution prevention and control). ELI: http://data.europa.eu/eli/dir/2010/75/oj

([121]) Directive (EU) 2016/2284 of the European Parliament and of the Council of 14 December 2016 on the reduction of national emissions of certain atmospheric pollutants, amending Directive 2003/35/EC and repealing Directive 2001/81/EC. ELI: http://data.europa.eu/eli/dir/2016/2284/oj

Water Framework Directive and the Birds ([122]) and Habitats ([123]) Directives can be financially compensated for under the CAP.

The Carbon Removals and Carbon Farming (CRCF) Regulation ([124]) establishes a certification framework for carbon farming, with the aim to complement farmers' incomes and support them in the transition towards more resilient production. On 3 February 2026, the Commission adopted a methodology to certify agricultural practices that sequester carbon or reduce emissions from soils ([125]), for instance through improved management of grasslands in extensive livestock systems. The Commission is currently assessing whether to expand the scope of CRCF to include the reduction of livestock emissions from enteric fermentation and manure management.

The EU research policy in agriculture focuses on promoting sustainable and resilient livestock farming, enhancing food security, and fostering innovation to address the challenges posed by climate change. The EU invests in research and innovation through framework programmes like Horizon Europe, which funds projects in key research areas for the livestock sector such as, for example, animal health and welfare, animal production systems, genetic resources, and breeding ([126]). To date, under Horizon Europe (2021-2027), the funds dedicated specifically to R&I in the land-based livestock sector within Intervention Area 3 'Agriculture, Forestry and Rural Areas' of Cluster 6, are managed by DG AGRI and amount to over 360 million euros.

Research goes from fundamental research up to applied research and potential market uptake, and includes collaborative projects, networking activities, EU partnerships, and multilateral and international cooperation. A robust collaboration with Members States and Associated Countries in R&I across agriculture, forestry, fisheries, food systems and the bioeconomy is fostered not only through co-funded initiatives but also via the Standing Committee on Agricultural Research (SCAR). R&I in animal health and welfare, has led to the launch in 2024 of the European Partnership for Animal Health and Welfare (EUPAHW) for a duration of 10 years. The Partnership strengthens the MAA to R&I across the EU co-funded projects conceived and implemented with the One Health – One Welfare vision. Examples of multilateral and international cooperation are the International Research Consortium on Animal Health (STAR-IDAZ), the International Coordination of Research on Infectious Animal Diseases (ICRAD) and the Global Research Alliance on Agricultural Greenhouse Gases (GRA GHG).

The Horizon Programmes support knowledge sharing and innovation uptake, working in synergy with the CAP under the umbrella of the EU CAP Network and the European Innovation

([122]) Directive 2009/147/EC of the European Parliament and of the Council of 30 November 2009 on the conservation of wild birds. ELI: http://data.europa.eu/eli/dir/2009/147/oj

([123]) Council Directive 92/43/EEC of 21 May 1992 on the conservation of natural habitats and of wild fauna and flora. ELI: http://data.europa.eu/eli/dir/1992/43/oj

([124]) Regulation (EU) 2024/3012 of the European Parliament and of the Council of 27 November 2024 establishing a Union certification framework for permanent carbon removals, carbon farming and carbon storage in products. ELI: http://data.europa.eu/eli/reg/2024/3012/oj

([125]) Commission Delegated Regulation (EU) 2026/285 of 3 February 2026 supplementing Regulation (EU) 2024/3012 of the European Parliament and of the Council by establishing the certification methodologies for permanent carbon removals activities. ELI: http://data.europa.eu/eli/reg_del/2026/285/oj

([126]) https://research-and-innovation.ec.europa.eu/research-area/agriculture-forestry-and-rural-areas_en.

Partnership EIP-AGRI. By providing funding opportunities for R&I for and with users, Horizon Programmes promote the implementation of a multi-actor approach (MAA) to R&I, which fosters collaboration among diverse stakeholders to address the real needs and challenges faced by farmers and rural communities.

To this end, Horizon Programmes facilitate a set of dedicated activities aimed at supporting a robust AKIS by i) sharing existing and new knowledge across the EU through thematic networks (TN)([127]) and ii) connecting advisors across all EU Member States through advisory networks (AN)([128]), but also on-farm demonstration and peer-to-peer learning. A considerable amount of MAA and TN within the livestock sector are currently being implemented. There are already more than 1 200 Operational Groups (OGs) working on animal husbandry and welfare contributing to more than 2000 practice abstracts.

The EC promotes R&I on sustainable farming methods through several means like Cordis Results Packs (e.g., animal health), EU Publications (e.g., livestock sustainability, AMR), Clustering workshops (e.g., livestock, modelling, digital, organic), AgriResearch Conference, AgriResearch Factsheets (e.g., Animal Production Systems), Factsheet on R&I, InfoDays, etc.

In addition, the EU has established comprehensive legislation to ensure animal health and welfare in livestock production, on animal-by products, on veterinary medicinal products and on feed and food hygiene ([129]) and on animal breeding ([130]). This legislation is also crucial for the sustainability, resilience, and competitiveness of the EU livestock sector. Based on the animal breeding legislation, the EU has established EU reference centres for bovine breeding and for endangered animal breeds, ensuring the scientific and technical contribution to the establishment and harmonisation of methods for the preservation of endangered breeds, and the preservation of the genetic diversity existing within those breeds.

Private sector initiatives substantially contribute towards sustainable livestock farming applications. Through pilot projects and farmer rewarding systems, they support dissemination of sustainable practices, while incentivising farmers, acting as front-runners for their scale up. Meanwhile, research and innovation, along with living labs accelerating their valorisation support the sustainable transition of the livestock sector.

The Single Market Programme (SMP) 2025-2027 provides for financial support for the control and eradication of several priority animal diseases through i) Emergency measures for animal diseases for which there is immediate eradication (eligible costs are compensation for animals killed, disinfections, vaccination subject to EU co-financing at a maximum rate of 30%) and ii) Veterinary multiannual programmes for planned surveillance control and eradication of certain diseases present or close to the EU at co-financing rates ranging between 12-30%). The co-financing rates of this SMP instrument were reduced in 2023 by 60% from the original 50/75% to the current 20/30% due to the unfavourable disease situation that forced to prioritise expenditure. A reversion to original co-financing rates and sufficient funding adapted to the prevailing epidemiological reality is necessary.

([127]) https://eu-cap-network.ec.europa.eu/thematic-networks-compiling-knowledge-and-solutions-ready-practice_en.

([128]) https://eu-cap-network.ec.europa.eu/advisory-networks-connecting-advisors-across-eu_en.

([129]) Food Safety - Food Safety - European Commission.

([130]) Zootechnics - Food Safety - European Commission.

The CAP post 2027 proposals

The CAP post 2027 proposals ([131]) include keeping income support at the centre of livestock farming, while making it fairer and better targeted. The proposals preserve existing CAP support instruments and guarantee that income support for EU livestock farmers will continue. As proposed by the Commission, coupled income support per animal remains available for the ruminants' livestock farms and the area-based coupled support is proposed to be extended to the production of grasses and other herbaceous forage. Payments focus on active farmers, excluding pensioners, and would be reduced for very large payments to ensure a fairer distribution. Extra support would be possible for mixed farms combining crops and livestock, farms in areas at risk of abandonment, and farms facing natural constraints, helping to maintain livestock production across rural areas.

A key feature of the proposed CAP post 2027 is its stronger focus on sustainable livestock systems. Member States would be required to support extensification of livestock farming in areas affected by nitrate surplus, and support to extensive livestock farming under voluntary commitments and the new transition payment. This aims to reduce pressure on soil and water while keeping farming viable. In this context, and depending on regional situations and scenarios, Member States could develop targeted measures for extensive grazing systems where relevant, in particular in marginal and high nature value areas, building on existing frameworks such as Natura 2000. Grasslands and grazing areas would remain eligible for support, recognising their role in carbon storage, biodiversity and landscape management. CAP will specifically allow for specific support for grass and other herbaceous forage, and livestock payments would also take into account environmental impacts, including limits on stocking density where needed.

The proposed CAP post-2027 gives greater importance to animal health and animal welfare. These are defined as key priority areas, and Member States must include support measures in their plans. Farmers would be able to receive funding for better housing, improved feeding systems, disease prevention and higher welfare standards. Support would also be available through agri-environmental and climate actions and the new transition payment to help farmers transition to more resilient and sustainable livestock systems, including changes in management

([131]) Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL establishing the European Fund for economic, social and territorial cohesion, agriculture and rural, fisheries and maritime, prosperity and security for the period 2028-2034 and amending Regulation (EU) 2023/955 and Regulation (EU, Euratom) 2024/2509. COM/2025/565 final.

Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL establishing the conditions for the implementation of the Union support to the Common Agriculture Policy for the period from 2028 to 2034. COM/2025/560 final

Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL amending Regulation (EU) No 1308/2013 as regards the school fruit, vegetables and milk scheme ('EU school scheme'), sectoral interventions, the creation of a protein sector, requirements for hemp, the possibility for marketing standards for cheese, protein crops and meat, application of additional import duties, rules on the availability of supplies in time of emergencies and severe crisis and securities. COM/2025/553 final

Proposal for a COUNCIL REGULATION amending Regulation (EU) No 1370/2013 as regards the aid scheme for the supply of fruit and vegetables, bananas and milk in educational establishments ('EU school scheme'). COM/2025/554 final

practices such as extensification in areas with high concentration of livestock, support to more extensive forms of livestock beneficial to the preservation of biodiversity and landscapes, or that improve animal wellbeing and reduce risks linked to climate change.

Another important feature is the proposed provisions on stronger protection against crises and market shocks for livestock farmers. The proposed new CAP includes a reinforced Unity Safety Net for agriculture, which can be activated in cases of serious market disturbance or natural disasters. Farmers may receive crisis payments or support for restoring production capacity after events such as droughts, floods or disease outbreaks. Member States would also have more flexibility to quickly amend their plans and redirect funds to livestock sectors when urgent support is needed.

Finally, the proposed CAP post-2027 supports the long-term future of livestock farming in rural areas. It promotes generational renewal by offering targeted support for young and new farmers, including higher payments, start-up support and investment aid. Livestock farmers can also benefit from support for farm relief services, helping improve work-life balance in labour-intensive sectors like animal production. By combining income support, environmental incentives, welfare improvements and rural development measures, the proposed new CAP aims to keep livestock farming economically viable, environmentally responsible and socially sustainable across the EU.

CHAPTER V: ANALYSIS. STRENGTHS AND WEAKNESSES OF THE EU LIVESTOCK SECTOR

Resilience

The resilience of the EU livestock sector is underpinned by several key strengths that bolster its adaptive capacity amidst evolving challenges. The sector benefits from a diverse array of production systems distributed across various regions, species, and market segments. This diversity enhances the sector's ability to adapt to differing local conditions and market demands. The CAP provides robust tools for income support, rural development, and risk management, ensuring a reliable safety net for farmers and other rural actors. The EU also maintains stringent animal health and welfare standards, contributing to heightened disease resilience and bolstering public trust in the sector. Innovation and digitalisation, coupled with effective knowledge transfer networks, and adoption of sustainable practices supported by adequate incentives, further support the sector's adaptability to climate, market, and regulatory pressure. The integration of livestock farming into circular systems exemplifies sustainable practices that include efficient manure use, renewable energy production, and nutrient recycling.

Among the sector's weaknesses that hinder its resilience, farm income plays a major role: it is characterised by volatility, influenced by fluctuating market conditions and input costs. Despite the mechanisms provided by the CAP, the uptake of risk management tools remains insufficient, leaving many farmers vulnerable. The ageing farming population and the limited generational renewal pose challenges to long-term sustainability. Additionally, exposure to animal diseases and climate shocks continues to threaten the sector's stability. There is a significant dependency on imported feed and global supply chains, exposing the sector to external shocks that may disrupt operations. As other agricultural sectors, livestock is exposed to the weaponisation of food by major agricultural world players. In parallel, the sector remains heavily dependent on the continued provision of essential ecosystem services (e.g.,

natural pastures, clean water, soil fertility and pollination…), meaning that degradation of natural habitats could amplify existing vulnerabilities ([132]).

Competitiveness

One of the sector's most important structural strengths is the high level of production standards applied across the sector. EU livestock producers operate under strict rules on animal welfare, food safety, and environmental protection, which protect human health, climate and the environment, and help ensure high-quality products and reinforce consumer trust both within the EU and internationally. These standards contribute to a strong reputation for reliability and quality, allowing EU products to differentiate themselves from competitors on global markets. Quality schemes such as Protected Designations of Origin (PDO), Protected Geographical Indications (PGI), and organic certification strengthen this differentiation by highlighting regional heritage, traceability, and specific production methods. In addition, several livestock sectors in the EU, particularly dairy and poultry, have developed highly efficient production systems supported by advanced technology, strong veterinary services, and well-established supply chains. These factors help maintain relatively high productivity. The combination of recognised quality, strict standards, and efficient production also supports growing export opportunities. EU livestock products are often positioned in premium market segments abroad, where consumers are willing to pay more for safety, traceability, and perceived quality, giving the sector a competitive edge in many international markets.

Among the structural weaknesses that can limit its competitiveness, a major challenge for the EU livestock sector is the relatively high cost of production compared with many international competitors. Compliance with strict EU regulations on animal welfare and environmental protection, while valuable for sustainability and product quality, often increase production costs for farmers. At the same time, producers may face competition from imported products originating from countries with less demanding standards, creating concerns about unfair competition and an uneven playing field. Another structural issue lies in the imbalance of power along the supply chain. Processing and retail sectors are much more concentrated than the farming community, which can reduce farmers' bargaining power and limit their ability to secure fair prices for their products. As a result, a significant share of the value generated in the supply chain may not reach primary producers. Furthermore, although consumers increasingly express interest in sustainable and high-welfare products, their willingness to pay higher prices for these attributes remains limited in practice. Finally, in some livestock sectors, market organisation remains fragmented, with many small producers operating independently. This fragmentation can weaken coordination, reduce economies of scale, and make it more difficult for farmers to negotiate effectively or invest in innovation and market development.

Sustainability

The livestock sector has several sustainability strengths in environmental performance, climate management and animal welfare. Compared with many global competitors, EU livestock production operates with a lower environmental footprint due to stricter regulations, improved farm management practices and advanced technologies. Grazing livestock systems play a role in maintaining biodiversity, particularly in marginal areas where livestock grazing

([132]) Economic and financial impacts of nature degradation and biodiversity loss - European Central Bank Economic Bulletin, Issue 6/2024. The ECB estimates that 72% of euro area non-financial corporations are critically dependent on at least one ecosystem service and identifies agriculture among the sectors exposed to nature-related risks.

helps preserve habitats and prevent land abandonment. In addition, livestock farming contributes to circular agriculture through the recycling of manure and nutrients. Manure is used as an organic fertilizer, helping to close nutrient cycles and reduce reliance on synthetic inputs while improving soil fertility and reduce air emissions, particularly ammonia. The sector shows growing integration with renewable energy production, particularly through the use of manure and agricultural residues for biogas generation, which contributes to rural energy production and greenhouse gas mitigation. Furthermore, the EU has some of the highest animal health and welfare standards in the world, embedded in comprehensive policies and regulatory frameworks. These standards not only improve the well-being of animals but also support product quality, consumer confidence and the overall sustainability of livestock systems across the EU.

Despite these strengths, the EU livestock sector also faces several sustainability challenges. One of the most significant concerns relates to greenhouse gas emissions, particularly methane produced by ruminants. These emissions contribute to climate change and are difficult to reduce without substantial technological and management innovations. Nutrient pollution is another key substantial environmental pressure particularly visible in regions with high livestock density, where large concentrations of animals can lead to acute nutrient surpluses, soil degradation and water quality problems caused by nitrogen and phosphorus runoff. The sector faces increasing scrutiny from the public regarding its overall environmental and climate impact. Public perception often focuses on the negative aspects of livestock production, which can affect consumer attitudes and policy debates. The complexity of requirements placed on farmers, including on sustainability is a particular challenge. Environmental, climate, and animal welfare policies sometimes overlap or create conflicting expectations, making compliance difficult and increasing administrative burden, while many livestock farmers are not sufficiently compensated for the ecosystem services they provide, such as maintaining grasslands, preserving landscapes and supporting biodiversity, which can discourage the continuation of environmentally beneficial farming practices.

Territorial diversity

Livestock farming plays a crucial role in sustaining rural economies and supporting employment across many regions. In numerous rural communities, livestock production provides a stable source of income and helps maintain local economic activity, particularly where alternative economic opportunities are limited. The sector is especially important in less-favoured areas such as mountainous regions, grasslands and other marginal territories where crop production may be difficult or less profitable. In these areas, livestock farming allows land to remain productive and ensures that agricultural activity continues, keeping life in those territories. Beyond its economic contribution, livestock farming also supports important environmental and cultural functions. Grazing animals help maintain traditional landscapes, prevent overgrowth and contribute to the preservation of biodiversity by sustaining diverse habitats. These practices often reflect long-standing agricultural traditions that form part of the cultural heritage of rural regions. By keeping land actively managed and supporting local livelihoods, livestock farming contributes to a more balanced territorial development. It helps maintain population in rural areas and reduces the risk of land abandonment, which can lead to environmental degradation and the loss of traditional landscapes.

Despite its importance, livestock farming in rural areas faces several structural challenges that threaten its long-term sustainability. One major issue is the continuing trend of farm abandonment and rural depopulation, particularly in marginal and remote regions. As younger generations leave rural areas in search for better economic opportunities, many farms struggle

to find successors, leading to declining agricultural activity and reduced local economic vitality. Extensive livestock systems, which are common in grassland and mountainous areas, often face significant economic viability challenges. These systems typically operate with lower productivity and higher costs, making it difficult for farmers to remain competitive in increasingly globalized markets. In addition, many rural regions suffer from gaps in infrastructure and essential services, such as transportation, digital connectivity, healthcare and education. These limitations reduce the attractiveness of rural living and make it harder for farmers and their families to maintain stable livelihoods. While policy frameworks such as the CAP provide support to farmers, existing measures are sometimes not sufficiently adapted to the specific territorial conditions of different regions, particularly those with unique geographic or socio-economic constraints. As a result, some areas continue to struggle to maintain viable livestock farming systems.

CHAPTER VI: STAKEHOLDER'S VIEWS AND CONSULTATIONS

Consultations were carried out via three basic channels: the EU livestock workstream ([133]), the European Board for Agriculture and Food (EBAF) ([134]) and a public Call for Evidence ([135]). The findings and conclusions of those consultations can be summarised as follows.

The EU livestock workstream

First Meeting, 27 May 2025 ([136])

- On market remuneration

The diversity of livestock production systems continues to require public support to provide income to livestock farmers, guarantee economic life in rural areas in danger of land abandonment and enhance livestock's positive contribution to biodiversity, climate change mitigation, circularity, renewable energy production, waste management, landscape preservation, animal health and welfare, etc. The market does not in itself remunerate all services provided by livestock farmers. Some niche markets may attract better farmers' remuneration, but the latter is quickly jeopardised when the niche market expands to become the new normal (e.g. recent experience with organic products). Market differentiation and labelling have limits in terms of underpinning higher consumer prices. Market differentiation and labelling also have limits in terms of underpinning higher consumer prices. Also, market prices do not always compensate for higher standards in the production process compared with imports from third countries, unfair competition from third country products respecting lower standards also needs to be properly addressed.

([133]) https://agriculture.ec.europa.eu/common-agricultural-policy/cap-overview/committees-and-expert-groups/livestock-workstream_en

([134]) https://agriculture.ec.europa.eu/common-agricultural-policy/cap-overview/committees-and-expert-groups/ebaf_en

([135]) https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/16832-EU-livestock-strategy_en

([136]) https://ec.europa.eu/transparency/expert-groups-register/screen/meetings/consult?lang=en&meetingId=62806

- On CAP support

Available tools under the current CAP offer the necessary portfolio of possibilities to accompany the sector on a positive pathway. A stronger focus is needed for generational renewal, farm resilience and risk management, digital transformation, knowledge transfer and innovation uptake. In other words, an evolution is necessary to make the best emerge from the livestock sector, no revolution. Territorial realities require tailored approaches. The variety of inspiring examples evidences the need for flexibility and adaptability to local contexts. Sustainability requirements that may appear irreconcilable at first sight can be addressed by the complementary assets of different livestock farming systems.

Second Meeting, 23 October 2025 ([137])

- On competitiveness

Competitiveness for the livestock sector is not just about cost efficiency. It requires a resilient, fair, innovative and sustainable model that ensures farmers' profitability, consumer trust and consistent global standards. Key enabling conditions include a predictable and coherent policy framework, a global level-playing field, investment in innovation and circularity, support for small and medium farms, and quality communication.

- On environmental impacts

The workstream showed a shared recognition that the sector must transition towards sustainability within planetary boundaries. Environmental transition must go hand in hand with economic viability and social cohesion. Innovation and circularity—such as biogas, manure management, and feed autonomy—are crucial to balance the environmental, economic, and social dimensions equally. Transition requires a stable investment climate for new technologies, science-based policies with measurable indicators, and mechanisms that reward farmers' sustainability efforts. These elements are consistent with broader EU objectives on biodiversity and nature restoration.

Third Meeting, 11 December 2025 ([138])

- On prevention and preparedness against animal diseases

Certain stakeholders expressed views indicating that:

  - Massive animal culling around disease outbreaks is no longer societally acceptable as a measure to eradicate diseases. Other approaches must be developed.
  - Prevention is better than cure and less costly.

([137]) https://ec.europa.eu/transparency/expert-groups-register/screen/meetings/consult?lang=en&meetingId=65322

([138]) https://ec.europa.eu/transparency/expert-groups-register/screen/meetings/consult?lang=en&meetingId=66503

- Vaccination should become mainstream. This requires overcoming technical difficulties in developing vaccines, timely anticipation, financing support to avoid that farmers are the ones bearing the costs and diplomatic handling at international level to avoid penalisation of trade with products coming from vaccinated animals.

- On research and innovation (R&D)

The workstream reached consensus around the need for R&I to be more immediately available to practitioners, ideally experimented directly with farmers (with a right to fail), and not duplicated to make the best out of available funds (once a practice proves its usefulness in an experiment, it should be spread around to maximise uptake).

Fourth Meeting, 18 February 2026 ([139])

- On an on-farm sustainability compass

The workstream discussions showed that on-farm sustainability compass must be holistic, i.e. not just covering environmental/climate sustainability but also look at social and economic sustainability. The main issue is to find an appropriate balance between keeping it voluntary and trying to have a degree of comparability at EU level.

- On animal welfare

Animal welfare is respected by all across the supply chain. The question is whether a further step is needed. If so, it must be quickly decided so that planning be possible for farmers to invest and it must be accompanied by financial backing.

Fifth Meeting, 29 April 2026 ([140])

- On feed and circularity in livestock production

There's a need to transition livestock systems towards efficiently utilising non-edible biomass. Circular practices, technological innovation, and by-product valorisation present clear sustainability benefits, yet uptake remains constrained by economic, regulatory, and knowledge barriers. There is a call for clearer, more coherent rules, lower costs, and stronger system integration to enable scaling.

- On social and territorial aspects in livestock production

Livestock underpins rural economies, jobs, and territorial cohesion, delivering ecosystem services and cultural value. However, the sector faces structural decline, generational gaps, regulatory burdens, and market barriers. There is a need for coherent policies, investment, local

([139]) https://ec.europa.eu/transparency/expert-groups-register/screen/meetings/consult?lang=en&meetingId=68202

([140]) https://ec.europa.eu/transparency/expert-groups-register/screen/meetings/consult?lang=en&meetingId=69481

infrastructure, and support for innovation to sustain resilient, attractive, and multifunctional rural areas.

European Board on Agriculture and Food (EBAF)

Fifth Meeting of the EBAF dedicated to livestock, 22 January 2026 ([141])

- On the economic viability of the livestock sector:

Discussion among EBAF Members and experts revealed a strong focus on ensuring economic viability in the livestock sector through coherent trade policies, equitable market regulations, and investment in resilience. Simplifying regulations, enhancing biosecurity and soil health, and recognising the critical role of livestock in the bioeconomy were highlighted as essential considerations. Addressing various challenges, such as regulatory constraints and price volatility, alongside strengthening cooperation and competitiveness within the supply chain, were deemed priorities for long-term investment. Additionally, efforts to remain competitive globally through quality and volume of products were noted, with disease prevention and innovation, including better animal feeding, being considered necessary for improving competitiveness.

- On investments:

Enhancing technological and infrastructure investments to bolster conventional production while promoting sustainable practices was advocated by EBAF Members and experts. Strategies to enhance investment access and risk management tools via the CAP toolbox were discussed, alongside the need for coherent policies and strengthened market orientation.

- On sustainability:

Environmental degradation, such as nitrogen pollution, animal disease, and greenhouse gas emissions due to livestock intensification, were examined, with calls for circular economy approaches to increase sustainability and competitiveness. CAP's role in financing transitions to more sustainable production methods, targeting environmental objectives, and supporting mixed farms were underlined.

- On attractiveness and social conditions:

Labour shortages and demographic changes affecting livestock farms in the EU were identified by EBAF Members as significant issues requiring attention. Enhancing skills through training platforms and encouraging youth involvement to drive digitalisation and innovation were seen as crucial steps under the CAP toolbox. Financing for farmer social services to improve mental health, life quality, and childcare under future CAP initiatives was highlighted as beneficial.

([141])https://ec.europa.eu/transparency/expert-groups-register/screen/meetings/consult?lang=en&meetingId=67897&fromExpertGroups=3976

Additionally, inclusion and enforceability of Trade and Social Development Chapters in EU trade agreements were welcomed.

- On animal health and welfare:

EBAF Members stressed the importance of animal health and welfare for the sector's long-term viability, linking improved welfare to addressing animal diseases. Biosecurity was emphasised as a priority in the upcoming EU livestock strategy. A call for more uniform support across the EU for vaccination and a future animal health fund was made, suggesting collaboration between public and private financing.

- On the territorial dimension:

There was an understanding that a "one-size-fits-all" strategy wouldn't work for the diverse EU livestock sector, with varied territories and production methods in EU areas. Livestock's significance for rural areas and as providers of public goods like landscape maintenance and biodiversity was recognised. Special consideration for mountainous and remote areas in CAP policies was advocated to counter ongoing land abandonment, ensuring strong rural development and addressing livestock eco-scheme deficiencies in certain EU Member States. At the same time, high concentrations in certain areas increase environmental footprint of production.

- On consumer demand:

Adapting to changing consumer preferences was underscored by several EBAF Members, noting a shift in EU consumers favouring white meat over red meat. Rising global demand for animal protein and the importance of One Health considerations were discussed, encouraging reduced meat consumption in Europe. Providing comprehensive information to consumers on livestock production standards was necessary, with a push for enhanced origin labelling. The increasing success of organic labels and demand for organic meat were seen as trends needing attention.

Public Call for Evidence

A public consultation on a Call for Evidence on the EU Livestock Strategy was opened from 16 March to 10 April 2026. The public consultation received 893 submissions from 30 countries. Across all stakeholder groups, three themes dominated the responses to the consultation: animal welfare, sustainable farming and farmer livelihoods.

Overall, respondents acknowledged that the EU livestock sector must transform, but disagree profoundly on the pace, direction, and instruments of change.

A complete synopsis report on the results of the public consultation is outlined in Annex A.

Annex A Synopsis Report: Public consultation on the EU livestock strategy

Summary

The EU Livestock Strategy public consultation received 893 submissions from 30 countries over a 25-day window (16 March – 10 April 2026). The consultation attracted an exceptionally skewed geographic distribution: France accounted for 66.0% of all submissions (589 responses), overwhelmingly from EU citizens (90.7% of French respondents).

Across all stakeholder groups, three themes dominate the consultation: animal welfare, sustainable farming and farmer livelihoods. These three themes represent a broad convergence: stakeholders acknowledge that the livestock sector must transform, but disagree profoundly on the pace, direction, and instruments of change.

The consultation reveals a fundamental tension between two visions of the future:

- a reform-oriented vision, primarily voiced by environmental and animal welfare NGOs, citizens, and some academic institutions, calling for a substantial reduction in livestock numbers, mandatory dietary shifts, and an end to factory farming; and

- a continuity vision, advanced by farming organisations, business associations, and trade unions, which accepts sustainability transitions but insists on economic viability, competitive trade conditions, and a gradual, farmer-led transition.

Themes and stakeholder groups

The most cited themes in the consultation are:

- Animal Welfare (81.9%): is the single most cited theme across all respondent categories. This does not mean universal agreement on what the animal welfare policy should entail: EU citizens, NGOs, and environmental organisations call for structural change (ending caged systems, limiting stocking densities), while farming associations and business groups emphasise the need for transition support, economic compensation, and global level-playing-field conditions.

- Sustainable Farming (80.2%): appears in nearly all substantive submissions but means different things to different respondents. For NGOs and environmental organisations, it implies a shift toward agroecological, low-input, and extensive systems. For farming organisations, it refers to precision technology, innovation, and improved efficiency within existing systems.

- Farmer Livelihoods (73.2%): reflects a general stakeholder acknowledgement that economic sustainability for farmers is non-negotiable in any transition. This is equally emphasised by NGOs (who argue farmers need public support to transition) and industry (who emphasise fair market conditions).

- Trade (37.3%): strongly emphasised by industry, business associations, and farming organisations. It reflects deep concern about competitive asymmetry: EU farms are expected to adopt higher standards than competitors importing into the EU market without equivalent requirements.

- Climate & GHG Emissions (26.5%)

- Meat & Dairy Consumption Reduction (20.0%)

By stakeholder group, the most cited themes are as follows:

- NGOs (n=220): Top themes: Animal Welfare, Sustainable Farming, Farmer Livelihoods & Economy, Meat & Dairy Consumption Reduction, Export and Trade

- Environmental Organisations (n=120): Top themes: Export and Trade, CAP and Subsidies, Sustainable Farming, Farmer Livelihoods, Animal Welfare

- Business Association (farm cooperatives, sector federations, interbranch organisations) (n=60): Top themes: Export & Trade, Farmer Livelihoods & Economy, Innovation & Technology, Sustainable Farming, CAP & Subsidies

- Company/business (large agricultural enterprises to SMEs in the food and feed industry) (n=35): Top themes: Sustainable Farming, Farmer Livelihoods & Economy, Export & Trade, Animal Welfare, Innovation & Technology

- Academia (universities, research institutes) (n=25): Top themes: Climate & GHG Emissions, Sustainable Farming, Biodiversity & Ecosystems, Farmer Livelihoods & Economy, Innovation & Technology

- Citizens (n=200): Top themes: Biodiversity & Ecosystems, Climate & GHG Emissions, Sustainable Farming, Animal Welfare, CAP & Subsidies

- Farming Organisations (n=100): Top themes: Sustainable Farming, Farmer Livelihoods & Economy, CAP & Subsidies, Animal Welfare, Climate & GHG Emissions

- Trade Unions (n=13): Top themes: Farmer Livelihoods & Economy, Export & Trade, Animal Welfare, CAP & Subsidies, Sustainable Farming

Points of consensus

Despite significant differences, the following positions enjoy broad cross-stakeholder support:

- The EU Livestock Strategy is necessary and timely. Across all respondent types there is near-universal acknowledgement that the EU livestock sector faces structural challenges requiring a coordinated policy response.

- Animal welfare must improve but transition needs support. Even the most industry-oriented submissions acknowledge that EU animal welfare standards should be raised. The disagreement is about pace, instruments, and whether improvement must be linked to global trade safeguards.

- Sustainable farming practices benefit farmers and society. Extensive grazing, agroecological approaches, and reduced input dependency are presented positively across the replies.

- Farmer income must be protected in any transition. There is a common understanding that farmers cannot be asked to bear the financial cost of societal transitions uncompensated.

- Third-country imports must meet equivalent standards ('level playing field'). EU producers face competitive disadvantage when importing countries do not meet the same welfare, environmental, or food safety standards.

- Innovation and technology are essential tools. Precision livestock farming, data-driven management, genetic improvements for feed efficiency and disease resistance, and biogas/circular nutrient systems receive broad support as enablers of a more sustainable sector.

- Biodiversity and extensive grazing deserve specific protection. Multiple respondent types recognise that extensive grazing systems play an irreplaceable role in maintaining semi-natural habitats, Natura 2000 areas, and landscape biodiversity.

- Better labelling and consumer information are needed. A relevant part of the submissions explicitly mentions labelling and transparency, with support from consumers, NGOs, and many industry actors who believe quality European products deserve differentiation from lower-standard imports.

Points of divergence

The following issues reveal fundamental disagreements:

- The role of meat consumption reduction. NGOs, citizens, environmental organisations advocate explicitly call for EU policy to promote reduced meat and dairy consumption, mandatory dietary guidelines, and a protein transition toward plant-based foods. They cite climate, health, and animal welfare grounds. Business associations, trade unions, farming organisations reject demand-side intervention as outside the scope of agricultural policy, economically damaging, and socially paternalistic. Business associations explicitly warn against measures that reduce European livestock production while imports fill the gap.

- The pace and ambition of animal welfare improvements. NGOs demand time-bound phase-outs of caged systems, mandatory maximum stocking densities, and enforceable EU-wide standards by specific target dates. Farming and business associations prefer gradual, voluntary, incentive-based transitions with long transitional periods (10–15 years), flexible implementation, and full economic compensation before any mandates take effect.

- Livestock reduction targets. Several NGO submissions explicitly call for legally binding targets to reduce the total number of livestock units in the EU, primarily for climate and land-use reasons. This is categorically rejected by all farming sector respondents, who argue that reducing animal numbers without addressing global food security and trade dynamics will simply shift production and emissions outside the EU.

- The nature of sustainable livestock. A disagreement exists about what 'sustainable livestock' means. Agroecological NGO advocates favour extensive, low-input, mixed-farming systems tightly integrated with local ecosystems. Technology-oriented industry actors respondents favour intensification improvements (precision feeding, genomics, biosecurity) that maintain or increase productivity while reducing per-unit environmental impact. These represent fundamentally different visions of the future farming.

- The role of the Common Agricultural Policy. NGOs want CAP payments strictly conditioned on animal welfare and environmental outcomes, with rapid phase-out of income support that is not linked to public goods delivery. Farming organisations want CAP to provide economic stability and transition support without punitive conditionality that reduces competitiveness.

- GMOs, gene editing, and novel technologies. Innovation-oriented respondents support accelerated regulatory approval for gene-edited livestock and novel feed technologies (insect protein, fermentation, algae). Several NGOs and organic farming respondents oppose GMO-adjacent technologies on precautionary and market differentiation grounds.

- Mandatory vs. voluntary standards. NGOs, Citizens, Environmental Organisations favour binding EU-level mandatory standards with clear timelines. Business associations, trade unions and farming organisations favour voluntary frameworks, market incentives, and sector-led agreements, arguing that mandates create competitive disadvantages and economic risks.