

Voluntary Report – Voluntary - Public Distribution

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Report Name: Spain Dried Fodder Production Holds Steady Amid Shifting Trade Flows

Country: Spain

Post: Madrid

Report Category: Grain and Feed

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Report Highlights:

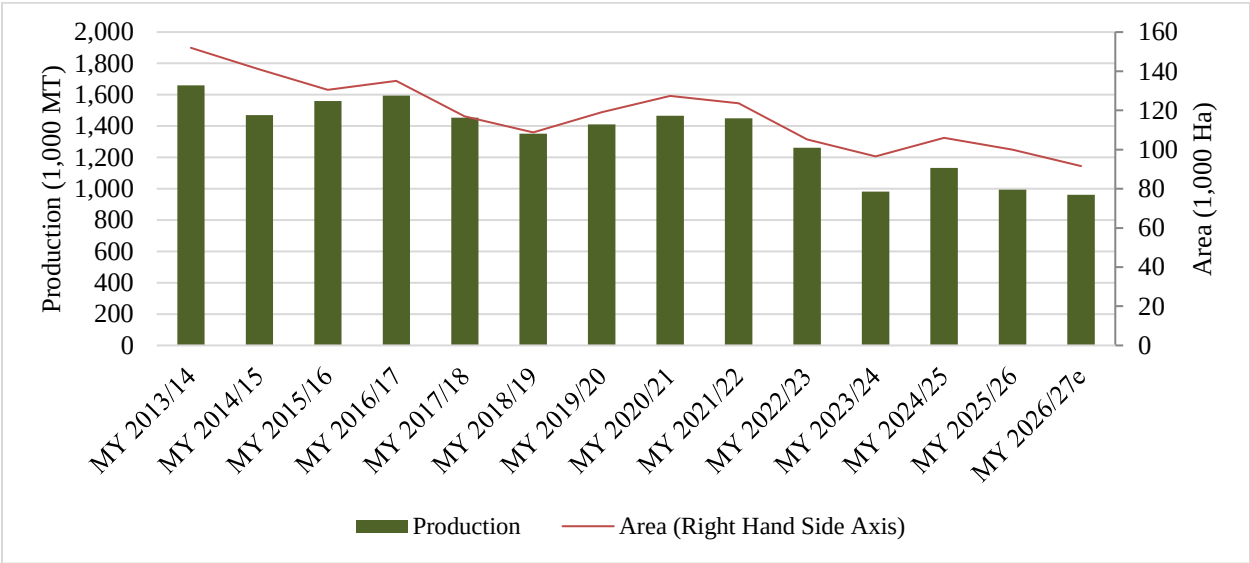
Spain's MY 2026/27 dried fodder output is expected at nearly 1 MMT despite the lower planted area. Tight supply and firm demand are pushing bale and pellet prices to multi-year highs. Domestic consumption in MY 2026/27 is expected to grow, given the limited pastures available, however, the domestic livestock industry remains a minor outlet for Spanish dried fodder. Notably, this season, the steady demand from drought-hit European buyers is likely to divert sizeable portion of Spanish dried fodder exports from third-country markets in the Middle East and Asia, creating opportunities for other exporters in those markets.

Disclaimer: This report presents the fodder sector situation in Spain. This report contains the views of the authors and does not reflect the official views of the U.S. Department of Agriculture (USDA). The data are not official USDA data.

Area and Production

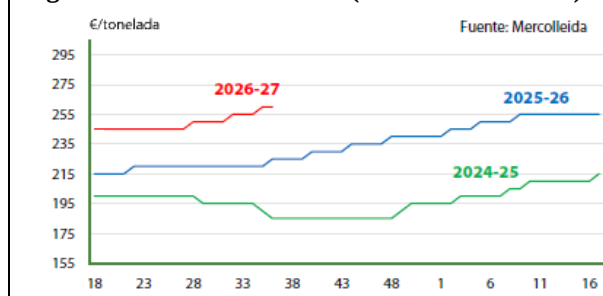
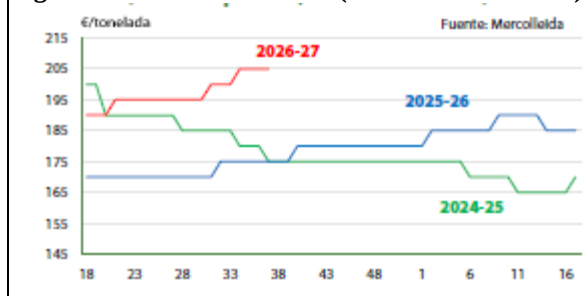
Spain dedicates approximately 100,000 hectares (ha) to the cultivation of fodder crops. For marketing year (MY) 2026/27, Spain’s area planted to forage crops intended for dehydration process is expected to decline by eight percent on last year. However, dried fodder production is expected to stay at nearly 1 million metric tons (MMT), very similar to previous season’s levels. Rain-fed fodder in Castilla y Leon has seen its yield reduced because of the impact of summer droughts and heat waves hitting the country since mid-May. However, production in the Ebro Valley, where most fodder is irrigated has benefited from dry, warm and sunny weather conditions, in the context of irrigation water readily available.

Figure 1. Dried Fodder Area and Production under Contract with Processing Plants



Source: FEAGA (Spanish Agricultural Guarantee Fund), AEFA and FAS Madrid estimates.

The favorable weather conditions in Aragon have led to higher output with excellent quality. Hence, most of the dried fodder has been processed into better priced bales (Figure 2), with pellet production (Figure 3) representing just over 15 percent of the total output. Mercolleida's price series (Figures 2 and 3) shows that MY 2026/27 opened notably higher than the previous two campaigns, starting at approximately €240/MT in the case of bales and €188/MT for pellets and climbing rapidly to €250/MT and €200/MT respectively, within just a few weeks. This early price strength stems from tighter supply and the steady EU demand for dried fodder.

Figure 2. Mercolleida Prices (Euros/MT of Bales)**Figure 3. Mercolleida Prices (Euros/MT of Pellets)**

Source: [Mercolleida](#).

Consumption

In MY 2026/27, dried fodder in-country sales are marginally expanding on the back of constricted pasture availability in Northern Spain, where drought forced dairy farmers to seek additional feed. However, domestic sales represent comparatively small portion of sales for the Spanish dried fodder market.

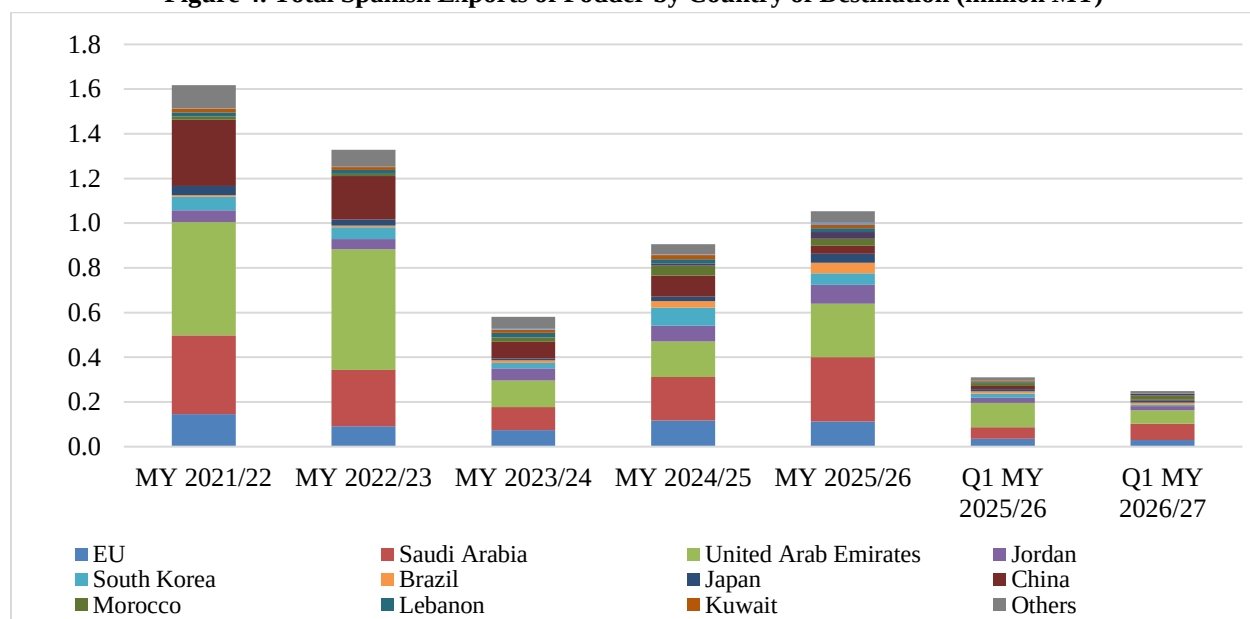
Trade

The steady demand by other European countries (France, Italy, Switzerland), whose forage production was severely impacted by summer drought and heat waves, is expected to redirect Spanish dried fodder away from Asian or Middle East markets towards European markets in MY 2026/27.

While pre-existing commitments will be honored, logistical disruptions, rising oil and freight costs surrounding exports through the Strait of Hormuz, are expected to curb Spanish fodder exports to the Middle East countries in MY 2026/27. Buyers in this region are increasingly turning to alternative suppliers such as Egypt, Sudan, and South Africa.

In MY 2026/27, the combination of limited availability and steady domestic and European demand is expected to reduce price competitiveness of Spanish dried fodder in Asian markets, namely China and Japan, where the Spain faces competition by other large global dried fodder suppliers such as the United States and Australia. That said, after the African Swine Fever (ASF) outbreak triggered South Korea's market closure to Spanish dried fodder in December 2025, this trade flow has normalized since the second half of 2026.

Figure 4. Total Spanish Exports of Fodder by Country of Destination (million MT)¹



Source: Trade Data Monitor LLC. Includes both bales and pellets.

Annex I. Processing Industry Profile

Spanish fodder producers use both sun-drying and mechanical dehydration to create dried fodder:

- **Sun-cured fodder:** Sun-cured fodder is normally less homogeneous and is for the domestic market. Sun-cured fodder operations include mowing, which may be combined with conditioning, turning, and tedding to allow an even drying, windrowing, collection, and baling.
- **Dehydrated fodder:**² Alfalfa destined for dehydration is cut in the field. After a pre-drying phase in the field, the alfalfa is windrowed and transported to the fodder processing plants. The large majority (85 percent) of the alfalfa is collected and transported by fodder wagons, while the remaining 15 percent is chopped and collected by forage harvesters and transported via trucks to the plant. The dehydrating process provides fodder with quality homogeneity and stability, which is highly appreciated in export markets.

Information on the Spanish dried fodder product range can be found in the National Dried Alfalfa Producers Association's ([AEFA](#))³ website.

¹ According to industry sources, exports under HS code 1214 may contain low protein content straw pellets or pelletized animal feed to feed animals exported live.

² Dehydrated fodder represents about 85 percent of the country's fodder production. It is domestically consumed and largely exported. In fodder processing plants, the alfalfa is classified by quality and moisture. The alfalfa then goes through the processing plant drier (one step trommel), which dries the fodder out with a 300°C air flow. Moisture levels of the final product fall between 12-14 percent.

³ AEFA is made up of 58 member companies and represents 90 percent of all dried fodder processors in Spain.

Related Reports

Report Title	Date Released
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Adverse Weather to Take a Toll on Dried Fodder Production in Spain	08/01/2023
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China: Spanish-origin alfalfa hay pellets dominate Chinese consumption	05/27/2022
Spanish Fodder Exports Reach an All-Times Record	07/29/2021
Spanish Alfalfa Consolidates Its Presence in China	06/25/2020
Spanish Dried Fodder Exports to China hit Record Levels	07/26/2019
Spanish Fodder Continues to Seek New Export Markets	09/12/2018

Abbreviations and References

AEFA	National Dried Alfalfa Producers Association
CAP	Common Agricultural Policy
EU	European Union
FAS	Foreign Agricultural Service
Ha	Hectares
MAPA	Ministry of Agriculture, Fisheries and Food
MS	EU Member State(s)
MT	Metric ton (1,000 kg)
MY	Marketing year (May/April)
N/A	Not Available

HS Code (Harmonized System) 1214: Rutabagas (Swedes), mangolds, fodder roots, hay alfalfa (Lucerne), clover, sainfoin, forage kale, lupines, vetches, and similar forage products, whether or not in the form of pellets.

Attachments:

No Attachments.