

Voluntary Report – Voluntary - Public Distribution

Date: July 07, 2025

Report Number: SP2025-0020

Report Name: Spanish Dried Fodder Production Expansion to Support Export Recovery

Country: Spain

Post: Madrid

Report Category: Dairy and Products, Grain and Feed

Prepared By: Marta Guerrero

Approved By: Karisha Kuypers

Report Highlights:

Despite the lower area anticipated, ample spring precipitations are expected to increase fodder yields in MY 2025/26. While a more dynamic domestic market demand is expected to absorb a larger share of production, the recovery of production, together with steady demand from third country markets, is expected to support a recovery of Spain's fodder exports in MY 2025/26.

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.

Table of Contents:

[No table of contents entries found.](#)

Abbreviations and References

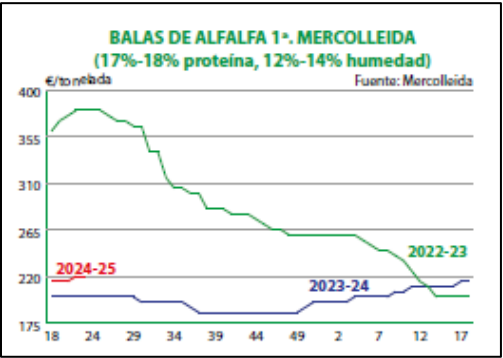
AEFA	National Dried Alfalfa Producers Association
CAP	Common Agricultural Policy
EU	European Union
ESYRCE	Annual Area and Yields Survey
FAS	Foreign Agricultural Service
Ha	Hectares
MAPA	Ministry of Agriculture, Fisheries and Food
MS	EU Member State(s)
MT	Metric ton (1,000 kg)
MY	Marketing year (May/April)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

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.

Area and Production

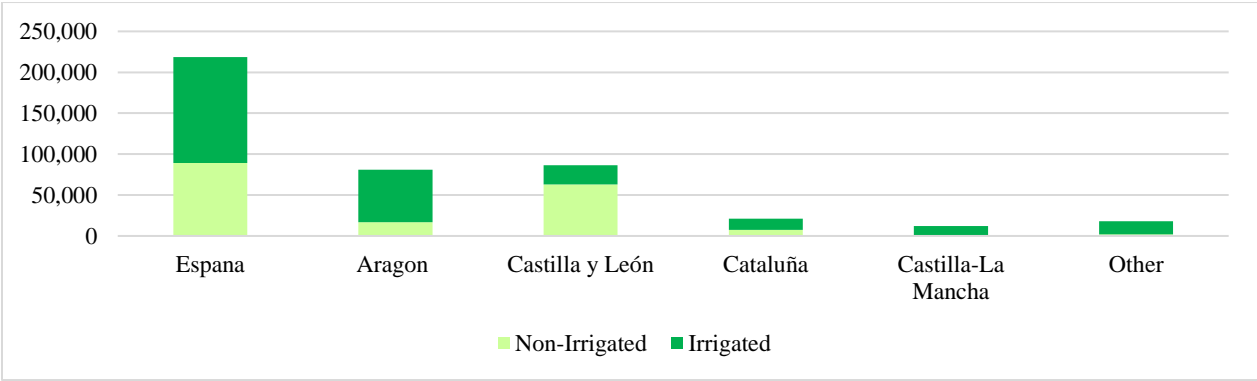
In MY 2025/26, area planted to fodder in Spain is expected to contract slightly as early fall precipitation impeded planting operations and prices in the fall planting season (Figure 1, weeks 39 to 49) were not sufficiently attractive to incentivize an area expansion. In non-irrigated growing regions, namely Castile and Leon, stiff competition by winter grains resulted in lower fodder plantings. Similarly, in the Ebro Valley fodder growing area, fodder plantings face stiff competition from tree crops and winter grains (barley) followed by a second-crop corn.¹ On average, 60 percent of production is grown under irrigation and the remaining 40 percent is rainfed.

Figure 1. Mercolleida Prices (Euros per Metric Ton)



Source: [Mercolleida](#).

Figure 2. Alfalfa Area by Autonomous Region – 2024 (Ha)



Source: Ministry of Agriculture, Fisheries and Food. ESRYCE 2024.

¹ There are two major alfalfa growing areas in Spain: Castilla y Leon and the Ebro Valley (Aragon and Catalonia), accounting respectively for 20 and 80 percent of Spain’s dehydrated fodder production. Agricultural practices differ among the above-mentioned alfalfa producing regions.

- In the Ebro Valley area (Aragon and Catalonia), the most cultivated alfalfa variety is “Aragón,” with about 75 percent of its cultivated land under irrigation. Irrigated fodder allows for up to 6 cuts per year. This producing region is largely oriented to export markets, with the Port of Barcelona as its main exit port.
- In Castilla y Leon, where nearly 70 percent of the alfalfa is non-irrigated, production is devoted to feed the domestic dairy herd. The most popular variety of alfalfa cultivated is known as “Tierra de Campos,” which performs well in heavy clay soils. In non-irrigated conditions up to 3 cuts per year can be carried out.

Spain’s fodder production in MY 2025/26 is anticipated to exceed MY 2024/25 levels and amount to 1.2 million MT. Abundant Spring 2025 precipitation is expected to boost yields in non-irrigated land and allow for sufficient water allocation in irrigated land. However, the combination of mild temperatures delaying crop development and excessive soil moisture preempting farmers from entering their fields resulted in delays and reduced quality parameters of the first cut. In most regions, fodder harvest only started in early May. On a positive note, dry and warm conditions prevailing since the second half of May accelerated plant development and improved quality expectations for the second and successive cuts.

MY 2024/25 production amounted to just over 1.13 million after hitting very low levels in MY 2023/24 when extremely dry and warm conditions slashed yields. About 80 percent of production corresponds to alfalfa and the remaining 20 percent to other fodder crops.

Figure 3. Dried Fodder Area and Production under Contract with Processing Plants



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

Processing Industry

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

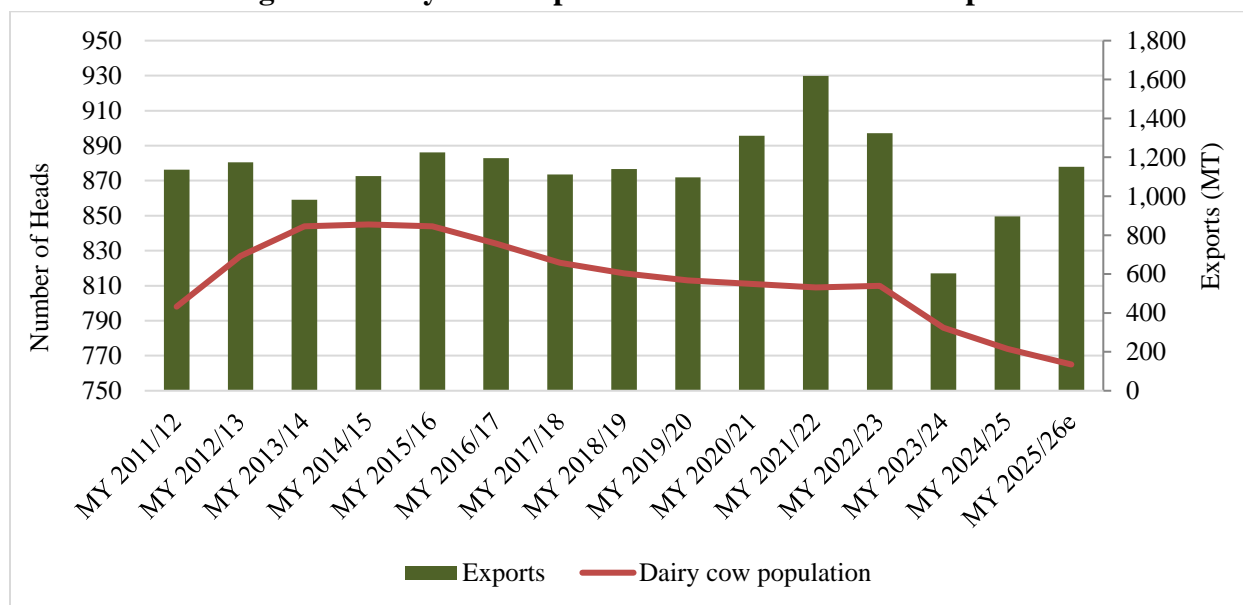
- **Sun-cured fodder:** Sun-cured fodder is normally less homogeneous and is for the domestic market. Sun-cured fodder operations include mowing, which may be combined with conditioning, turning, and tedding to allow an even drying, windrowing, collection, and baling.
- **Dehydrated fodder:**² Alfalfa 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.

Consumption

In MY 2025/26, better prospects for dairy farms, which currently enjoy positive margins, is opening opportunities for in-country sales of dried fodder, despite the ample pasture availability.

Figure 4. Dairy Cow Population and Dried Fodder Exports

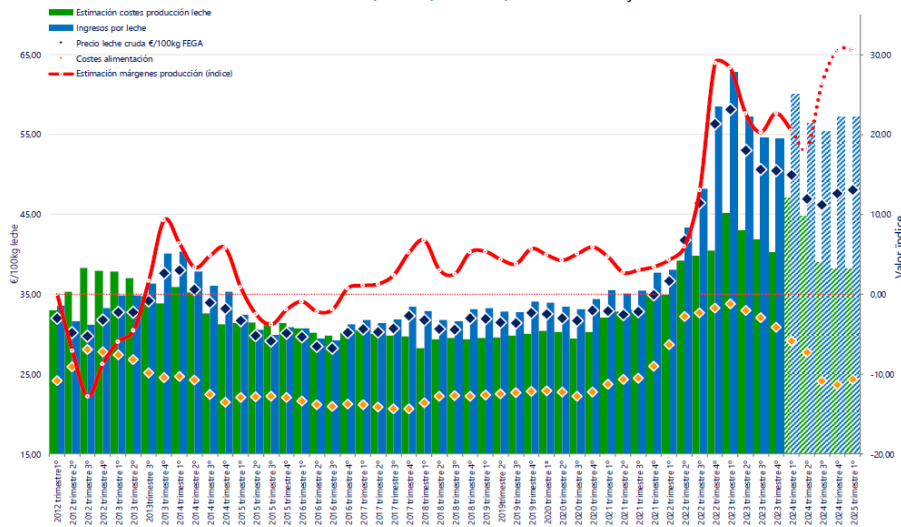


Source: FAS Madrid based on Eurostat data and FAS Madrid estimates.

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.

Figure 5. Dairy Farms Feeding Margins Index



Source: Ministry of Agriculture, Fisheries and Food. [Dairy Sector Report](#).

In MY 2024/25, a tepid recovery registered in milk and dairy product prices helped sustain in-country demand and fodder prices. Nevertheless, domestic fodder demand only represents a small destination for the country's fodder production.

The declining cow numbers in Spain are compensated by increased productivity per animal, which is a result of a combination of different factors, including improved animal genetics and more elite feed being supplied to the animals, where dried fodder plays a pivotal role.

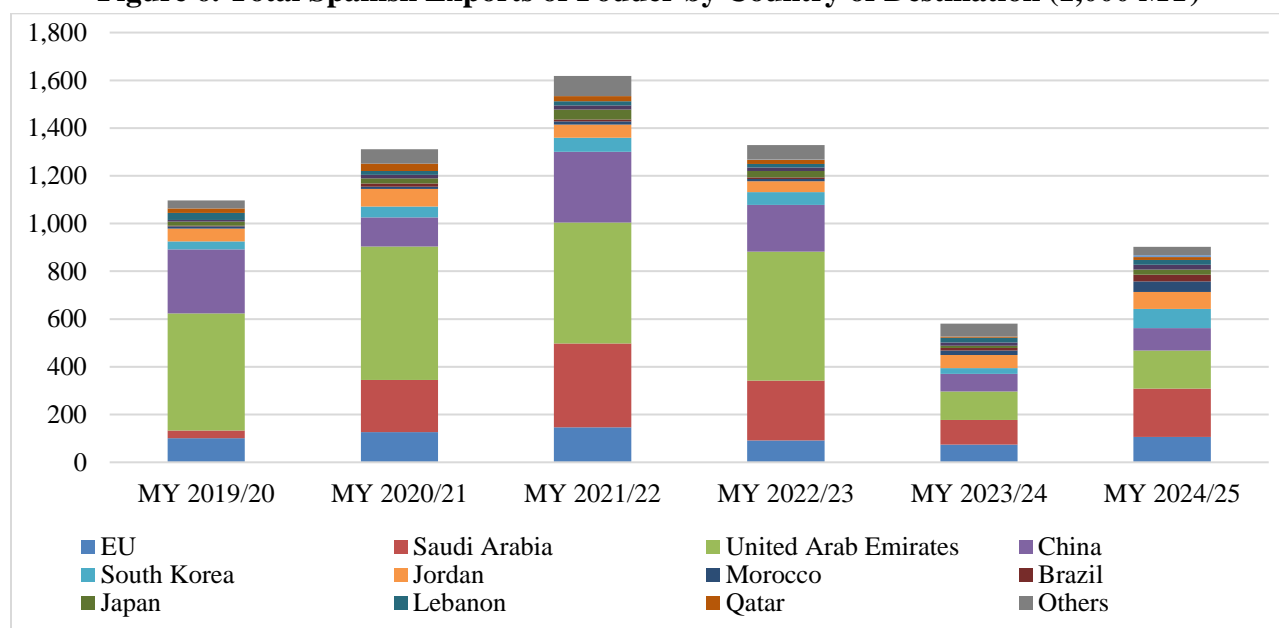
Trade

The recovery of production levels, particularly true in non-irrigated areas, is expected to allow MY 2025/26 exports to exceed 1 million MT, up from the 900 million MT in MY 2024/25, and the barely 600 thousand MT exported in MY 2023/24, when the short crop resulted in soaring prices.

Despite the production rebound, Spain's fodder exports are not expected to hit the record volumes registered in MY 2021/22. The domestic market is becoming a steady outlet although still significantly smaller than the export market.

Beyond mature markets, export opportunities continue to arise in Asian markets such as South Korea, which is becoming a loyal customer of Spanish fodder, or in Morocco, whose demand varies significantly as a factor of domestic forage availability.

Figure 6. Total Spanish Exports of Fodder by Country of Destination (1,000 MT)⁴



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

Policy

For the 2023-2027 period (PEPAC), given its agronomic diversity and decentralized organization, Spain opted for a Common Agricultural Plan (CAP) that reconciles its numerous interests and productive realities. Key aspects of the new CAP in place since January 2023 include the introduction of a results-focused⁵ approach and increased environmental focus compared to the previous policy. The enhanced conditionality merges cross-compliance⁶ with greening payment requirements (mandatory). Additionally, on a voluntary basis, farmers can adhere to eco-schemes defined at the Member State level. Another novelty includes the introduction of "social conditionality" to ensure social and labor regulation compliance in those businesses benefiting from CAP subsidies. Spain's fodder growers are eligible for the Basic Income Support for Sustainability Payment and the Redistributive Payment and may adhere on a voluntary basis to eco-schemes. Likewise, fodder crop growers (including vetches and alfalfa) may receive the Coupled Payment for Protein Crops.

⁴ 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.

⁵ The CAP's key objectives across the EU include: to ensure a fair income to farmers, increase competitiveness, rebalance the power in the food chain, climate change action, environmental care, preserve landscapes and biodiversity, support generational renewal, vibrant rural areas, and protect food quality and health. An additional crosscutting objective aims to foster farm modernization through knowledge, innovation, and digitalization in rural areas.

⁶ Including Statutory Management Requirements (SMR), applicable to all farmers whether or not they receive support under the CAP and Good Agricultural and Environmental Conditions (GAEC), only applicable to farmers receiving CAP support.

Related Reports

Report Title	Date Released
Spanish Fodder Production and Exports Set to Recover in New Marketing	08/13/2024
China: Market Overview - Alfalfa Hay and Other Forages	04/30/2024
Adverse Weather to Take a Toll on Dried Fodder Production in Spain	08/01/2023
Spanish Fodder Exports Break New Ceiling	07/29/2022
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

Attachments:

No Attachments.