THE EUROPEAN ALFALFA DRYING INDUSTRY

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CONTEXTE EUROPÉEN
Some background history...

- The beginnings of drying: the Fifties
- High prevalence of forage
- Legumes were an economic constraint
- Drying was an innovative and «cutting-edge» technology
- Drying plants were few and small
SOME BACKGROUND HISTORY...THE EARLY SIXTIES

A watershed:

- Farms began to specialize
- Synthetic fertilizers were introduced
- This spelt the end of a farming model where the family representing an abundant source of labor
Introduction of the Common Agricultural Policy (CAP)

- comparative advantage for cereals
- drop in fodder acreage: permanent grasslands and legumes
SOME BACKGROUND HISTORY...

1973

- The first and the second oil shock hit driers severely in many regions
  - Awareness that drying plants were too small
  - Large industrial facilities were established
  - The challenge faced by the industry : How to save energy
Some background history…

After 1973

• The supply of animal feed was made secure: The European Commission helped the European fodder drying industry

  • The upside of alfalfa: a vegetable protein => fewer imports

  • ➔ An aid system was put in place to promote investment

  • ➔ An aid system was introduced to support the production of dried alfalfa
The history of the CAP is not a long and winding road:

- Alfalfa came under the CAP back in 1978
- Reforms were pursued in 1992 and 1999 and 2005 and 2008 and 2013 and.....
- Specific support to be discontinued as of the 2012 harvest
Some background history...

- The challenge faced by European driers:
  - Ensuring farm income maintenance
  - Offering an attractive product to breeders
  - Taking account of the constraints of the environment, sustainable development, food security and energy efficiency
Trend toward more agricultural science and fewer agrochemicals

Strong demand for:
- Organic products ➔ alfalfa is a must
- High-quality products ➔ secure alfalfa
- GMO- free
- Health product ➔ oméga3 in milk
What is drying all about

- A conditioning process whereby all the product attributes are preserved + by-pass effect
- Producing a standardized product for demanding buyers from heterogeneous raw materials
- Devising a range of specific products for each kind of animal
- Initiating alfalfa cracking
Graph of changes in the amount of proteins per cut (France)
How drying works

Fresh alfalfa

Belt

Burner

Drum

Fan

Cyclone separator

Vapour of heat

Press

Storage of dried alfalfa (pellets or bales)
RECOVERY OF HIDDEN CALORIES

Storage of dried alfalfa (pellets or bales)
Réunion WW
F  21-
04-09 Energie et Déshydratation
16
LA RECOLTE DES ANDAINS
Flat drying in the field
Additional swathing step
Réunion WW 24
THE CHALLENGES AHEAD

- Becoming energy-efficient

- 50% of European production meets the criteria
  - Use of pre-wilting
  - Use of biomass

- Invest in R&D
The key assets of the drying industry

- Dried alfalfa meets the requirements of the greening policy as promoted by the CAP:
  - A productive and environmentally responsible agriculture
  - Recognized environmental qualities of alfalfa
  - Biodiversity
  - Local production
  - Excellent traceability without GMOs in Europe
  - Products manufactured by plants complying with the HACCP standards
  - Vegetable proteins
The future of the drying industry

- From « drier » to « processor » to « industrialist »
- Cater to the demands of society
- Add intelligence to our products
- United we stand....
Our industry is evolving: we are becoming processors of products, whether pulp, wood or defibrizer straw ...

Many processors are investing in energy production as a new source of revenue
Cater to the demands of society

- Shift from a society of engineers to that of influence peddlers: NGOs play a major part in the political decision-making process:

Respect for the air, water, biodiversity and social conditions...

⇒ sustainable development is demanded (paid for ??)
ADD INTELLIGENCE TO OUR PRODUCTS

- We cannot compete against products coming from countries where people earn $150 a month
  - Technical products,
  - Innovative products
  - non-traditional markets
UNITED WE STAND....

- By tradition, alfalfa producers are not very united
- Driers must imperatively economize
- Discussions are becoming increasingly technical
- Market players are becoming bigger and better organized
- R&D and innovation are a must to make a difference
- Civil society is demanding more sustainable development
- NGOS are becoming more vocal

⇒ United we will stand ...but this far from easy ...
SOME FIGURES

Luzernes déshydratées
Les principaux pays producteurs européens

Base 100
(campagne 93/94)
SOME FIGURES

Luzernes déshydratées
Les principaux pays producteurs européens

Base 100 (campagne 05/06)
SOME FIGURES

Principaux pays producteurs en Europe
Déshydratés + Séchés soleil

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Principaux pays producteurs en Europe
Fourrages déshydratés

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Principaux pays producteurs en Europe
Fourrages "séchés soleil"
WEB LINKS

- **Italian Dehydrators Association site:** [www.aife.eu](http://www.aife.eu)

- **British Association of Greencrop Driers site:** [www.bagcd.org](http://www.bagcd.org)

- **French Dehydrators Association site:** [www.luzernes.org](http://www.luzernes.org)

- **Spanish Dehydrators Association site:** [www.aefa-d.com](http://www.aefa-d.com)
The CIDE member countries:

- France: Coop de France Déshydratation
- Italy: AIFE
- Spain: AEFA
- The Netherlands: VNG
- Germany: BLTD
- Denmark: Ki-Dam
- UK: BAGCD
- Czech Republic: Cza