

# EFSCM 6th Ad hoc meeting linked to the situation in the Middle-East

Date: 26/03/2026

CELCAA - Michael Gore (UECBV) and Julie Collard (Eurolait)

## Introduction

Overall presentation was given on the current situation in the Middle East.

Situation in the Gulf is still very volatile. Military transport infrastructure and maritime traffic through the street of Hormuz. Only traffic allowed with approval from Iran. Hostilities are increasingly affecting global trade, market chains and energy.

18/03/2026 temporary suspension of operations for export of crude oil.

Strategic backup infrastructure

Rerouting for cape of good hope.

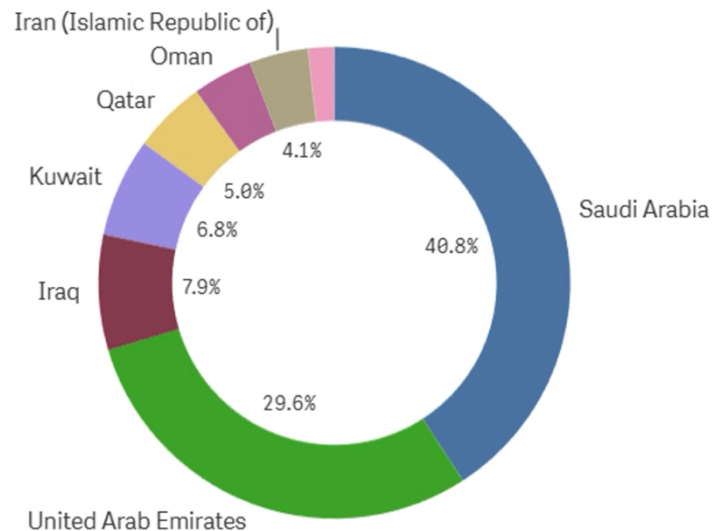
Trade flows were detailed:

### Trade flows - EU agri-food trade (2025 data)

- **EU agri-food trade with GCC countries (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates) + Iraq and Iran**

- Exports: EUR 11.7 billion
- Imports: EUR 789.6 million
- Exports to GCC - high share of Processed Agricultural Products (PAPs) – 40%
- Tourism, migrant workers, MICE, HoReCa

- **EU agri-food trade with South-East Asia & Oceania (Red Sea / Bab-el-Mandeb)**



Export to Gulf Coop Council : High % are processed agriculture products 40%-47%

Conflict impacts tourism flows, migrants, horeca, meetings, etc. Many activities are on hold. There is less demand for high value products (processed).

Food import dependency:

## Food security in the Gulf

Country	Food Import Dependence (% of food consumed)	Food Security Strategy	Main Agri-Food Products with Relative Self-Sufficiency
United Arab Emirates	~85-90 % imports	National Food Security Strategy (logistics, storage, overseas investments & diversification)	Eggs (high), fresh milk (significant domestic supply), limited vegetables, dates
Saudi Arabia	~70 % imports	Vision 2030 food security initiatives, overseas farmland investments	Dairy products, eggs, dates, some vegetables; cereals mostly imported
Qatar	>90 % imports	Qatar National Food Security Strategy 2030 (diversify supplies, build reserves)	Fresh milk, poultry sometimes near self-sufficient; other products mostly imported
Kuwait	>90 % imports	Strategic food reserves and export controls (recent export ban to protect supply)	Limited domestic agri; small vegetable & dairy production
Bahrain	~90 % imports	National food security planning; stockpiles	Limited domestic production (vegetables, small livestock sectors)
Oman	~65-70 % imports	Agriculture development with focus on horticulture, fisheries	Fruits (~70 %), vegetables (~80 %), fisheries
Iran	Mixed – still imports key staples (wheat, maize, rice, veg. oils)	Long-standing self-sufficiency programs; subsidies on staples; import management policies	Domestic wheat and many fruits/vegetables are produced locally; nevertheless grains/oilseeds often imported
Iraq	Domestic production significant for some crops; imports needed for others (e.g., sugar, oils)	Government agricultural production support, SDG2-aligned plans	Vegetables, fruits, meat often locally available; wheat occasionally self-sufficient; other staples imported

## Feedback from the EU fertiliser industry

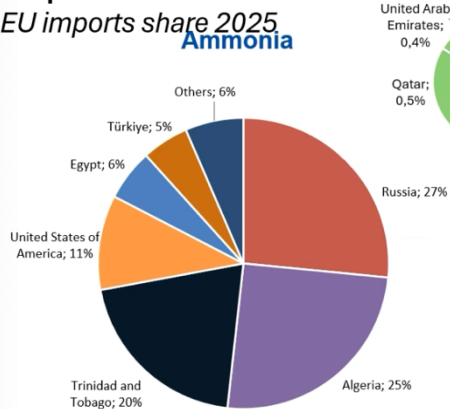
### EU fertiliser market - Timeline



March: 5th month of increase for nitrogen based fertilisers

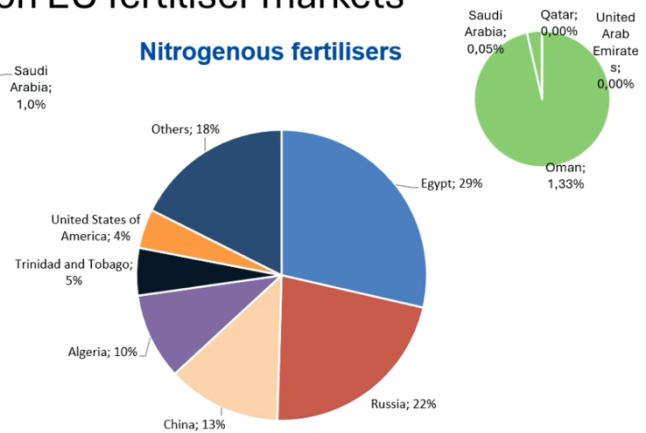
## Impact of Middle-East tensions on EU fertiliser markets

EU imports share 2025



- **Middle East: 3%**
- Little imports from Middle East countries, but there are concerns regarding a decrease in global supply.

## Nitrogenous fertilisers



- **ME: 1-2%**
- Little imports from Middle East countries, but there are concerns regarding a decrease in global supply.

Only 3% import from Middle East (green)

More countries were more dependent on the Middle East who will also be seeking alternatives, putting pressure on the market.

DAP-MAP: 2000T from Israel, less from Baghrein and SA. Reliant on MArocco, supplies more than 50% of volume on the EU, and dependent on sulphur from Middle-East

Potash: import 20% Israel and Jordan. Little risk, alternatives are abundant.

# Short-term effects

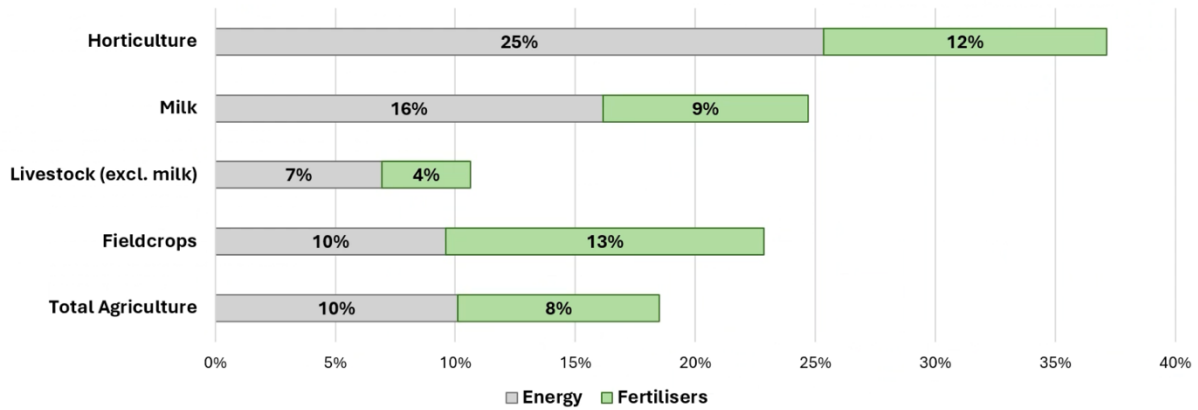
- The Middle East accounts for 9% of global production capacity of urea and 35% of global exports;
- +120 to 200 USD/tonne increase across commodity markets for urea (US GULF, FOB Middle East, FOB Brazil) in first 3 weeks of March;



source: Barchart.com

Price increases could continue.

## Share of energy and fertilisers in intermediate consumption



Averages 2020-2021

# Intervention from EUCOLAIT

## Middle East conflict – implications for dairy sector & trade

- **Closure of Strait of Hormuz impacts**
  - Soaring **energy** and **fertilizer prices** affecting whole supply chain
  - **Logistics disruption** and rising **shipping costs**
  - Likely **demand loss in Gulf markets**: supply challenges, reduction of tourism & reduction in air traffic, less expats
  - Expected **dairy consumption** and/or trading down due to **inflation & energy** and fuel cost
- Gulf States heavily **reliant on imported food** (80%-90%), including dairy. Solutions to maintain food supply should/must be found.
- **Iran exports** of dairy products **suspended**, further limiting supplies to the broader region.

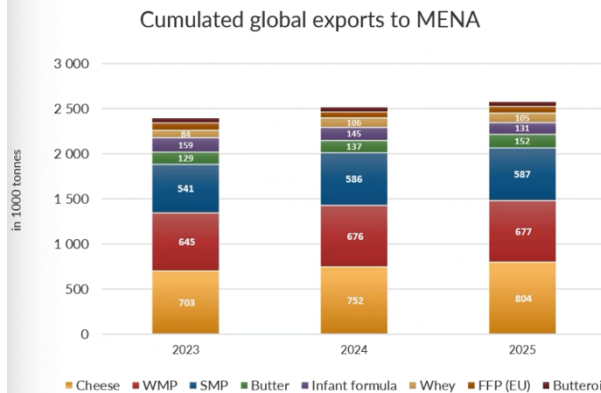


Country	Self-sufficiency		Milk balance in million t
	in %	Δ% 24/15	
Iran	126%	↑ +22%	2.46
Iraq	55%	↓ +120%	-1.15
Saudi Arabia	54%	↓ -11%	-2.46
Qatar	34%	↑ +64%	-0.40
Oman	24%	↓ -5%	-0.95
United Arab Emirates*	15%	↑ +63%	-1.54
Kuwait*	9%	↑ +59%	-0.74
Bahrain*	3%	↓ -17%	-0.31

\* Estimates Source: IFCN



## Exports to MENA



Country	Share of total	Δ% 25/24
<b>Total</b>	<b>100%</b>	<b>↑ +2%</b>
Algeria	22%	↓ -2%
Saudi Arabia	18%	↑ +2%
U.A. Emirates	13%	↑ +8%
Iraq	8%	↑ +15%
Egypt	8%	↑ +5%
Oman	4%	↓ -8%
Morocco	4%	↑ +7%
Kuwait	4%	↑ +20%
Jordan	3%	↑ +15%
Libya	3%	↓ -32%
Other MENA countries	13%	↑ +2%



TDM

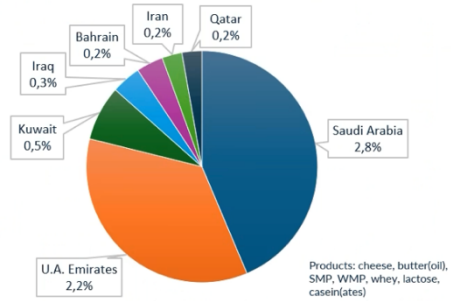
MENA includes Algeria, Bahrain, Egypt, Iran, Iraq, Israel, Jordan, Kuwait, Lebanon, Libya, Morocco, Oman, Qatar, Saudi Arabia, Syria, Tunisia, UA Emirates & Yemen

Growth in 2025 from Gulf countries. Driven by population growth and other factors

Gulf countries represent 6% of global dairy trade

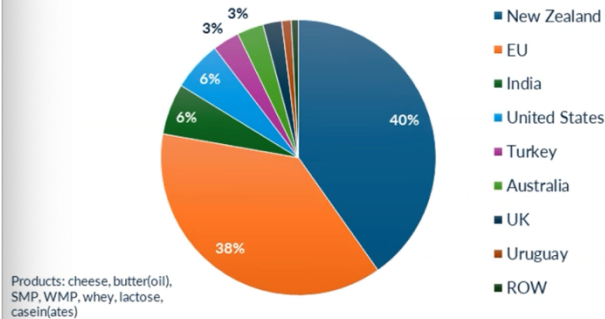
Global dairy trade to Gulf markets in 2025		
Product	Volume in tonnes	Share of global trade
Cheese	191 258	6%
Butter	81 563	11%
Butteroil	40 886	13%
SMP	137 116	6%
WMP	191 766	10%
Whey	33 011	2%
Infant formula	61 308	9%

Global exports to Gulf countries in 2025



Main exporters to Gulf countries

Main dairy exporters to gulf countries (in milk equivalent)

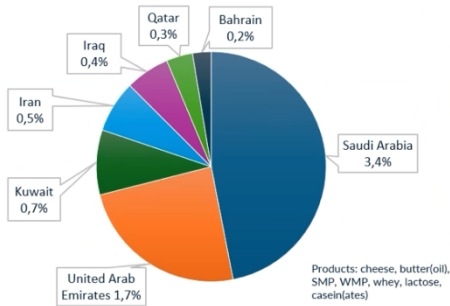


Main dairy exporters to Gulf countries		
Exporter	Share of total	Δ% 25/24
<b>Total</b>	<b>100%</b>	<b>↑ +4%</b>
New Zealand	40%	↑ +7%
EU	38%	↑ +8%
India	6%	→ +1%
United States	6%	↑ +11%
Turkey	3%	↓ -9%
Australia	3%	↓ -41%
UK	2%	↑ +61%
Uruguay	1%	↓ -20%
<b>ROW</b>	<b>1%</b>	<b>↓ -39%</b>

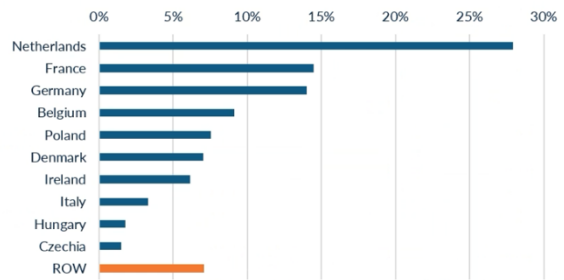
# Importance of Gulf countries for EU dairy trade

Gulf countries represent 7% of EU dairy exports

Share of Gulf countries on EU dairy exports



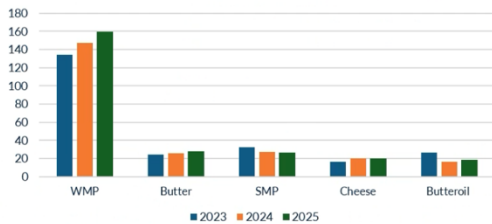
EU exports to Gulf countries by MS



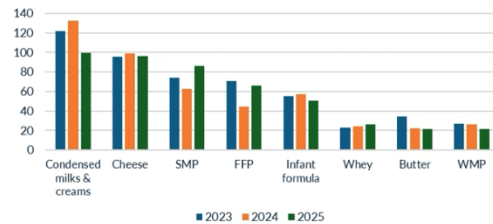
EU and NZ most affected

## NZ & EU – product portfolio

Main NZ dairy exports to Gulf countries (in 1000 tonnes)



Main EU dairy exports to Gulf countries (in 1000 tonnes)



- NZ exports → 2/3 WMP
- EU exports → more diversified portfolio with high-value branded products & ingredients

Source: TDM

End of the season NZ, most affected

## Middle East conflict – focus on trade & logistics

- Normal **patterns of trade** have been **disrupted**
- Huge economic losses due to **increased freight rates, insurance surcharges and additional land transit**
- Exports to **Saudi Arabia remain possible** but freight rates are much higher
- Exports to the **small gulf states** Bahrain, Kuwait, Qatar and UAE are **more problematic**. Little experience with transit through other countries.
- **Alternative routes to Strait of Hormuz**
  - **Port of Jeddah** by the Red Sea most viable alternative. However **capacity** is becoming an issue, making it an **expensive** option. **Transit time** to the Persian Gulf 5 days and very costly.
  - Oman?
  - Aqaba (Jordan)?
  - Türkiye (+Iraq or Syria/Jordan)??



Image generated by AI



Around Cap of Good hope to avoid the Red Sea.

Importers are still willing to pay the price. Sharp decline due to surge in production because of contracts.

Stressing high commodity prices and low milk prices. Interesting to see how this develops in the near future.

### **Intervention from COPA-COGECA by Agnieszka Maliszewska**

Fertiliser price since beginning of the year - 25-30%

Situation on global market situation and price are important for EU citizens.

Farmers are waiting for the best moment to pay the best/cheapest price, but the situation is unstable. So there is speculation. Also the diesel price increased from 45 to 70%+. The impact on packaging costs etc cannot be denied. Several compensations asked - use of digests, reduce import duties, more flexibility.

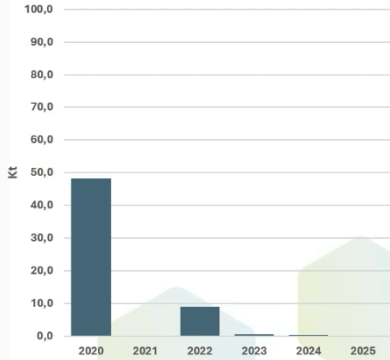
Now is a critical moment for farmers in use of farmland during the sewing period, especially now.

### **Intervention by Chris Poole from Fertiliser Europe.**

No shortage now. Frontloading beginning of 2025. No issues for the farmers.

## DIRECT EU27 UREA IMPACT: LOW

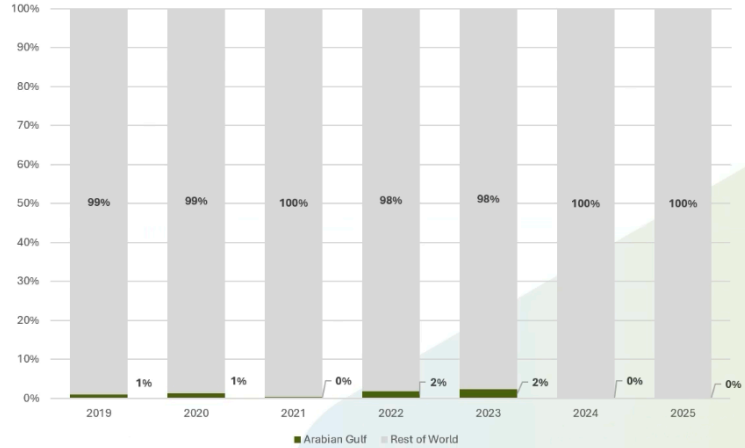
### EU27 Imports of Iranian Urea: 2020 – 2025



There are virtually no imports of Iranian Urea into the union, with even historic volumes being close to insignificant.

### GULF Region EU27 Urea Import Share:

Even Looking at the broader affected Gulf region\*, the **direct impact** on Urea supply is insignificant.



\*Countries exporting Urea via the straits of Hormuz (i.e. Saudi Arabia, Qatar, Iran, Bahrain, UAE)

Not dependent on the shipping routes  
Direct impact is very low for urea and ammonia

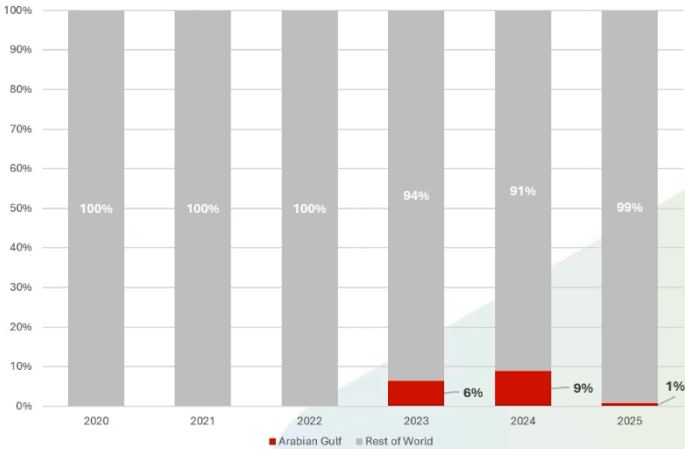
## DIRECT EU27 NH3 IMPACT: LOW

### OVERVIEW:

- No current or historic NH3 Imports of significance enter the Union originating in Iran.
- The only directly effected source of EU37 NH3 imports in the Arabian Gulf is Saudi Arabia, which are not at a significant level.

### EU27 Imports of NH3 from Saudi Arabia

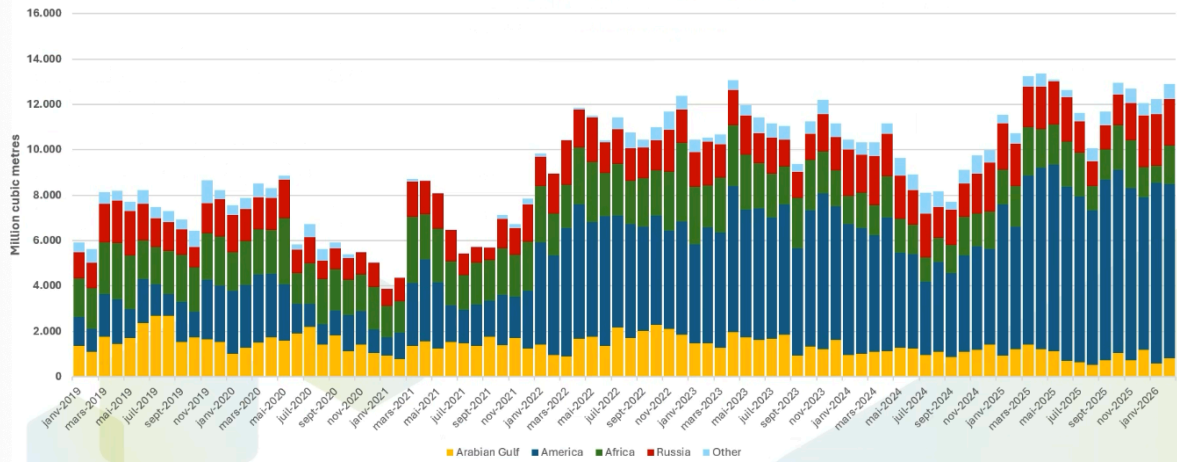
Imports of NH3 from Saudi Arabia remain minimal and will have no significant **direct impact**.



There is a direct impact for NH3.

## GLOBAL GAS IMPACT: **VERY HIGH**

### EU Monthly Imports of LNG by source (MCM):

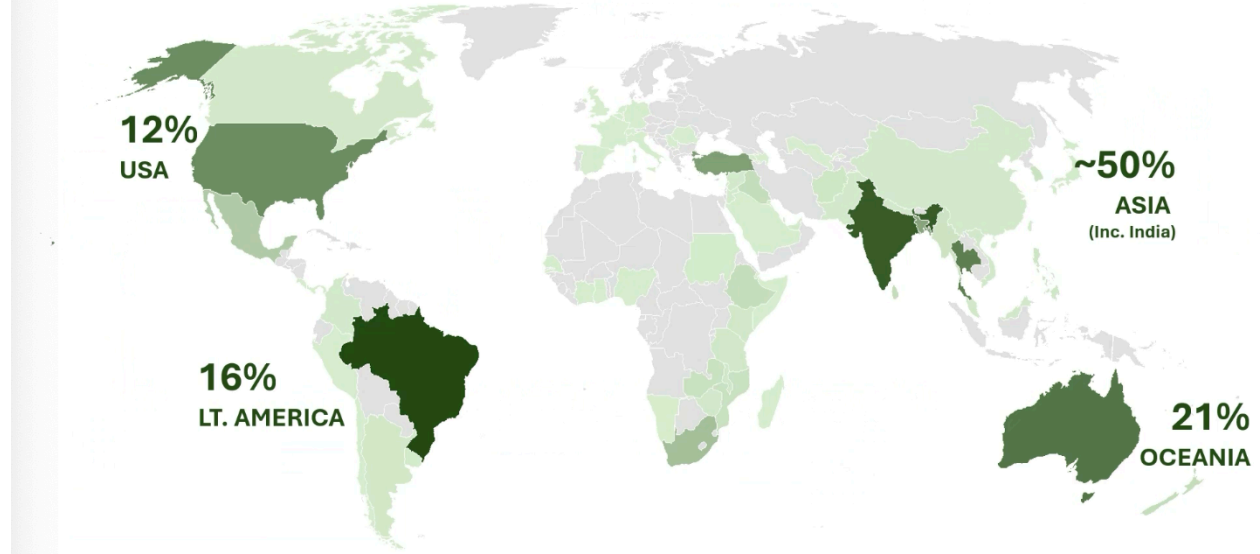


**While the direct importance of LNG from the Gulf is small (about 10%), it represents about 28% of Global LNG supply (22% of which is Qatar)**

LNG 50% more expensive than when the conflict began. Direct impact.

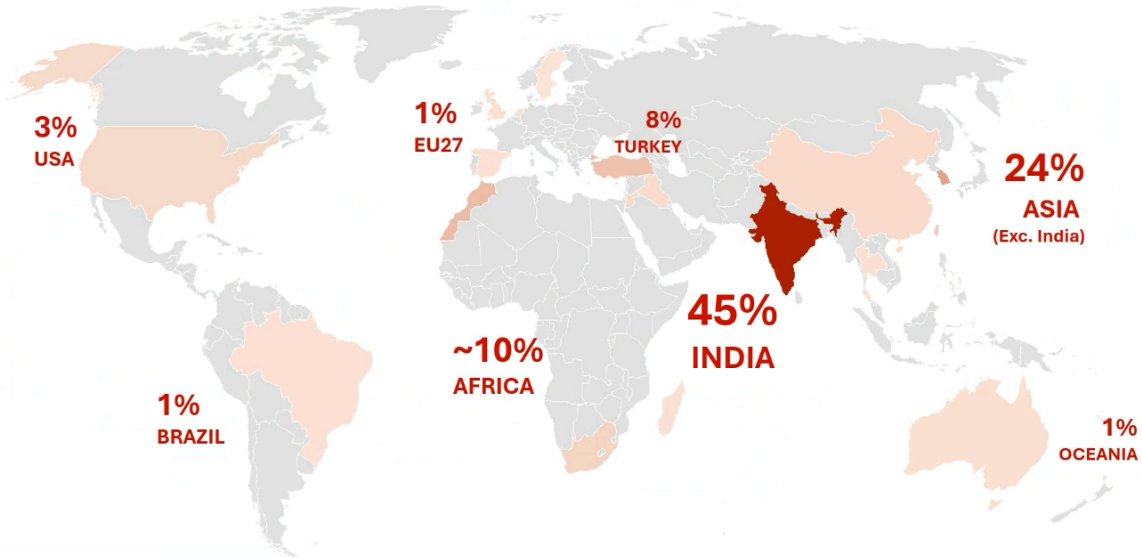
## INDIRECT EU27 UREA IMPACT: **EXPOSURE MAPPING**

### ARABIAN GULF UREA EXPORT DESTINATIONS 2025



## INDIRECT EU27 NH3 IMPACT: EXPOSURE MAPPING

### ARABIAN GULF NH3 EXPORT DESTINATIONS 2025



India is cutting urea output, but they are one of the largest producers and consumers and thus they have a direct impact.

## SUMMARY: KEY POINTS

### DIRECT AND INDIRECT IMPACT

The European fertilizer market is not being directly impacted by the closure of the strait. The indirect impact from global changes in supply and demand as well as increased gas prices will increasingly impact the European fertilizer market.

### DEMAND INELASTICITY:

Given the highly inelastic nature of Nitrogen markets, fluctuations in supply of this magnitude are likely to have serious price shocks, notably in Asian markets, but at such a scale that is likely to effect union prices.

### EUROPEAN PRODUCTION:

It is necessary for the European Union to have strong domestic production to ensure that the volatility of geopolitical crises have less of an impact on European food security.

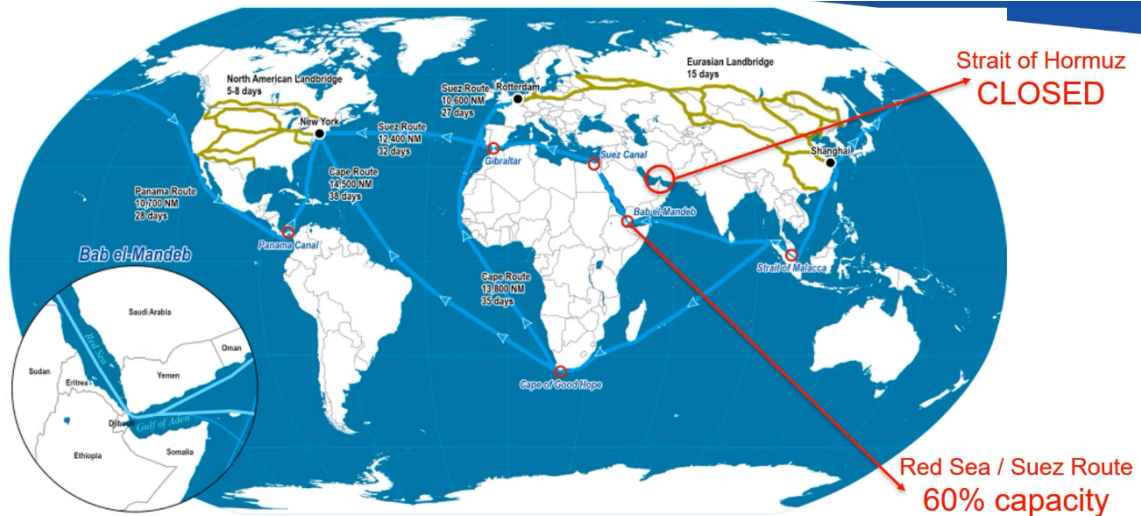
# Intervention by Shane Brennan Global Cold Chain Alliance



## Member Briefing Middle East Crisis and European Supply Chain Resilience

Shane Brennan, SVP Global Policy

18/03/2026



MSC	COSCO	CMA CGM	MAERSK	HAPAG LLOYD	ONE
War Surcharge \$500-\$1000 Fuel surcharge \$200 DECLARED END OF VOYAGE CONTAINER UNLOADING COST \$800	CURRENTLY ALL ROUTES INTO PERSIAN GULF SUSPENDED AWAITING RESUMPTION / SURCHARGE INFO	Conflict Surcharge \$4000 FUEL SURCHARGE \$75-180 PERSIAN GULF 40 FT REEFER SURCHARGE \$4,000	EMERGENCY BUNKER SURCHARGE \$400 PERSIAN GULF 40 FT REEFER SURCHARGE \$3,800	WAR RISK SURCHARGE \$3,500	EMERGENCY BUNKER SURCHARGE - \$105-\$210 PERSIAN GULF 40 FT REEFER SURCHARGE \$3,400

Level of uncertainty to deliver materials through the shipping lines adds to costs and uncertainty. Timelines, Assumption of temporary disruption.



**STRATEGIC CARGO ACCESS VIA KHORFAKKAN & FUJAIRAH**

Through Port of Khorfakkan, RSA Global enables inland and sea freight routing into the UAE, with onward connectivity across the GCC region.

**WHAT WE OFFER**

- SEA FREIGHT CONNECTIVITY India - Khorfakkan cargo services
- CCC DELIVERY NETWORK Across major GCC ports & cities
- INLAND TRUCKING Bonded & non-bonded transport
- CUSTOMS CLEARANCE Efficient documentation support

This gateway ensures smooth cargo movement even during disruptions to traditional shipping lanes.

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**STRATEGIC CARGO ACCESS VIA OMAN**

Port of Sohar serves as a key gateway supporting cargo movement with sea freight connectivity between India and the GCC.

**RSA GLOBAL SERVICES**

- SEA FREIGHT CONNECTIVITY India - Sohar cargo services
- CCC DELIVERY NETWORK UAE - Saudi Arabia - Qatar - Bahrain - Kuwait
- INLAND TRUCKING Bonded & non-bonded transport
- CUSTOMS CLEARANCE Fast documentation & compliance support

Sohar's strategic location allows cargo arriving by sea to be quickly distributed across GCC markets through reliable inland transport.

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**STRATEGIC CARGO ACCESS VIA SAUDI ARABIA**

Through Jeddah Port, RSA Global provides sea freight connectivity and inland logistics solutions linking India with Saudi Arabia and the wider GCC region.

**OUR SERVICES**

- SEA FREIGHT India - Jeddah connectivity
- INLAND TRUCKING Bonded & non-bonded transport
- CUSTOMS CLEARANCE Documentation & compliance handling
- FINAL DELIVERY Across Saudi Arabia & GCC markets

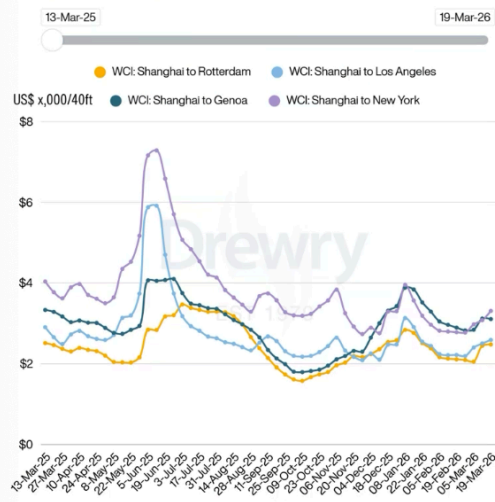
**EXTENDED CONNECTIVITY**

- Via Jeddah, cargo can also connect to major Red Sea ports, expanding access to regional trade routes and supporting cargo movement across the wider Middle East.
- A strategic gateway ensuring continuity for cargo entering the GCC.

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# Global Container Prices (average, minus war premiums)



Drewry WCI - ROUTE	Route code	5 Mar 2026	12 Mar 2026	19 Mar 2026	Weekly change (%)	Annual change (%)
<b>WCI Composite Index</b>	WCI-COMPOSITE	\$1,958	\$2,123	\$2,172	2% ▲	-4% ▼
Shanghai - Rotterdam	WCI-SHA-RTM	\$2,052	\$2,443	\$2,478	1% ▲	1% ▲
Rotterdam - Shanghai	WCI-RTM-SHA	\$543	\$528	\$539	2% ▲	11% ▲
Shanghai - Genoa	WCI-SHA-GOA	\$2,844	\$3,120	\$3,108	0%	-5% ▼
Shanghai - Los Angeles	WCI-SHA-LAX	\$2,402	\$2,503	\$2,591	4% ▲	-3% ▼
Los Angeles - Shanghai	WCI-LAX-SHA	\$724	\$723	\$727	1% ▲	4% ▲
Shanghai - New York	WCI-SHA-NYC	\$2,977	\$3,080	\$3,310	7% ▲	-12% ▼
New York - Rotterdam	WCI-NYC-RTM	\$964	\$942	\$961	2% ▲	14% ▲
Rotterdam - New York	WCI-RTM-NYC	\$1,570	\$1,527	\$1,504	-2% ▼	-35% ▼

<https://www.drewry.co.uk/supply-chain-advisors/supply-chain-expertise/world-container-index-assessed-by-drewry>



Stress in China and India with congestion and lead times (6-12 weeks) equipment dislocations. Lack of refrigerated containers

# European Food Freight (cost inflation)

Brent (\$/bbl)	Diesel €/L (est.)	Diesel change	Freight impact (FSC-driven)
<b>\$90</b>	€1.70	-6%	<b>-1.5% to -2.0%</b>
<b>\$100 (baseline)</b>	€1.78	—	—
<b>\$110</b>	€1.85–1.88	+4–6%	<b>+1.5% to +2.5%</b>
<b>\$120</b>	€1.92–2.00	+8–12%	<b>+3% to +5%</b>
<b>\$140 (stress)</b>	€2.10–2.25	+18–25%	<b>+5% to +8%</b>
<b>\$160+ (Hormuz disruption)</b>	€2.30–2.60	+25–40%	<b>+8% to +12%</b>

GCCA estimate, pass-through costs, (2026)

Increased diesel costs for road freight  
If >140-160 dollars → production and availability concern.

# European Food Freight (Rates Impact)



Lane	Distance	Base Cost	FSC-driven uplift	New Cost	€ Increase
Southern Spain → Rungis (Paris)	1,450 km	€2,103	+4–6%	€2,187–2,229	+€84–126
Almería → Rotterdam	2,100 km	€3,150	+4–6%	€3,276–3,339	+€126–189
Netherlands → Milan	1,100 km	€1,705	+4–6%	€1,773–1,807	+€68–102
Poland → Paris	1,600 km	€2,240	+4–6%	€2,330–2,374	+€90–134
Denmark → Northern Italy	1,400 km	€2,100	+4–6%	€2,184–2,226	+€84–126
UK → Rungis (Paris)	450 km	€720	+4–6%	€749–763	+€29–43

GCCA cost estimate model, 2026



Costs based on today's prices

# European Energy Market Today v. 2022 Crisis

## In 2022

- Europe relied on Russia for 40% of its gas supplies and it was cut off indefinitely
- No extensive gas storage
- Hedging purchase less widespread (c.10-30%)
- Gas followed the electricity price almost 1:1 (70-90% pass through)
- Peak energy cost  $\Delta$ TTF (Aug 2022) €300+ MWh

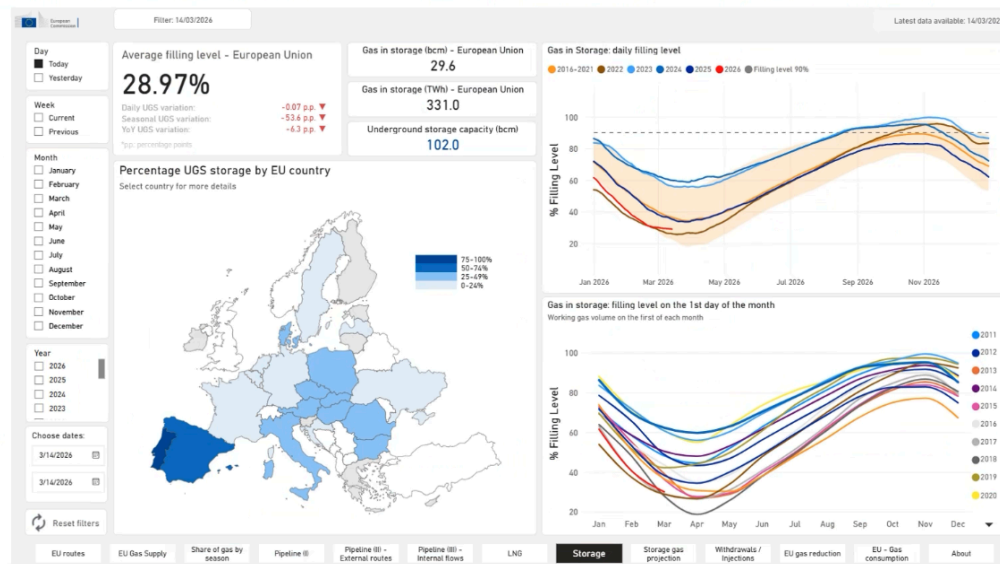
## Today

- Europe has a different energy mix (LNG the primary concern and has a different, global demand profile)
- EU has mandated extensive gas storage to address short term shocks
- Hedging more common (40-70%)
- Average pass through is lower and more variable (est. 25-55%)
- Stress scenario prediction range  $\Delta$ TTF €70-120 MWh



More resilient than in 2022, not the same crisis structure (less reliant on Russian gas), more LNG gas in storage.

## EU GAS STORAGE



Source [https://joint-research-centre.ec.europa.eu/jrc-news-and-updates/interactive-gas-monitoring-dashboard-boost-eu-energy-security-2024-10-07\\_en](https://joint-research-centre.ec.europa.eu/jrc-news-and-updates/interactive-gas-monitoring-dashboard-boost-eu-energy-security-2024-10-07_en)



End of the winter, beginning of refill - will impact demand and pricing - worry about behaviour of prices.

## Worst Case Scenario (not the expected scenario)

<b>1. Strait of Hormuz disruption</b> All goods stop moving creating supply bottleneck  Immediate effect on Oil price > \$100-150 + LNG disruption = Gas TTF spike.		<b>2. Qatari LNG outage</b> Qatar loses the ability to produce LNG, this compounds Strait block.  This will trigger/compound <b>gas price spikes</b>		<b>3. Infrastructure strikes</b>  Attacks on export terminals or refineries. Removes millions of barrels/day	
Commodity	Price estimate	Commodity	Price estimate	Commodity	Price estimate
Brent Oil	\$120-200bbl	Brent Oil	-	Brent Oil	\$130-\$180
TTF Gas	€120-180/MWh	TTF Gas	€150-200/MWh	TTF Gas	€90-130
European Power	€300-600/MWh	Euro Electricity	€400+/MWh	European Power	€250-400
<b>4. Shipping insurance / disruption</b>  Even without physical outages, insurance costs and shipping risk can drive price spikes.		<b>5. Other Factors</b>  The biggest price spikes don't come from physical shortages alone. They come from tanker insurance costs, LNG cargo bidding wars, storage panic buying and futures market speculation		<b>COMBINED WORST CASE</b>	
		Commodity	Extreme Estimate		
		Brent Oil	\$180-\$250		
		TTF Gas	€200-300/MWh		
		Euro Electricity	€600-1000/MWh		



Several scenarios are linked to compounded risks. Potentially extremes are possible, links to 2022 are likely in this case.

## Cold Storage – Power Cost Estimate Model

Region	Countries	S1 (2-6 weeks)	S2 (1-3 months)	S3 (3-12 months)	Risk Level
<b>Nordic shield</b>	Sweden, Finland, Norway	<b>2-4%</b>	<b>5-10%</b>	<b>8-14%</b>	● Low
<b>Nuclear / hydro continental</b>	France, Belgium, Austria, Switzerland, Slovenia	<b>2-5%</b>	<b>6-11%</b>	<b>10-16%</b>	● Low
<b>Iberian semi-insulated</b>	Spain, Portugal	<b>3-6%</b>	<b>7-14%</b>	<b>12-20%</b>	● Medium
<b>Core gas-linked markets</b>	Germany, Netherlands, Denmark, Luxembourg	<b>4-7%</b>	<b>9-17%</b>	<b>15-25%</b>	● Elevated
<b>Southern / CEE import sensitive</b>	Italy, Poland, Czechia, Slovakia, Hungary, Romania, Bulgaria, Croatia, Greece	<b>4-9%</b>	<b>10-20%</b>	<b>17-29%</b>	● High
<b>Baltic markets</b>	Lithuania, Latvia, Estonia	<b>5-9%</b>	<b>11-22%</b>	<b>19-31%</b>	● High
<b>Peripheral / island systems</b>	UK, Ireland, Cyprus, Malta	<b>5-9%</b>	<b>11-22%</b>	<b>19-31%</b>	● High
Energy mix (typical cold store): Electricity: 85% Gas/heat: 15% Hedging assumption: 50% of energy costs hedged Shock transmission: European electricity prices partly track gas (TTF)		Driver variable: % change in TTF gas price			
		Scenario	Time horizon	TTF change	
		<b>S1 – Contained disruption</b>	2-6 weeks	+15% to +30%	
		<b>S2 – Strait disruption</b>	1-3 months	+35% to +70%	
		<b>S3 – Protracted crisis</b>	3-12 months	+60% to +100%	

GCCA cost estimate model, 2026



## Concluding Thoughts

- EU logistics is more prepared and more resilient than it was to the 2022 crisis, and it is structurally a very different scenario this time.
- Energy markets and logistics operations are still responding to events based on the assumption that it is a temporary interruption
- Every day that the crisis extends and every escalation increases the possibility of worst-case scenario outcomes
- There is no room for complacency, and contingency actions may be required within days/weeks.

### **Feedback of Measures in particular for the farm sector from governments:**

IE/ Damien Ward: Field price pressure. Package of temporary targeted measures for farmers

Temporary reductions on oil tax - 25/03/2026 till 31/05/2026. NORA levy (national oil reserve agency charge) to nominal charge. Other support to households. Measures are time bound and temporary with adjustments as the situation evolves.

To do: Survey with national authorities to get an overview of measures to accompany the sector.

### **Open floor**

- FoodDrink Europe/ Louis Hinzen: impacted with logistics. Rerouting of vessels adds to transit times 10days-2 weeks. Reduced rail reliability, especially for time/temperature sensitive products + surcharges. One concern on shortage of fuels for maritime transport. Accumulative cost burden across the sector is a real risk. Implication on CO2, food packaging materials. What EU levels can be taken to limit excessive energy price volatility. Continuity in trade flows? Triggers required to elevate discussion at higher levels?

- Nagel Group - Thomas Pütter. Cold chain transport. Time lag in getting the cost back. Haulier industry is based on SMEs. Cash flow and liquidity can become an issue.
- Richard Ali - Tetrapak. Situation impacts all packaging and polymers (PE/PP) into the EU, increase 10-15% and more in near future. Paper, metal and glass also directly impacted. Shortages in some types of packaging. Freight 3-5 weeks longer (Cape Good hope). Inks, adhesives, thin films and machinery components can be impacted. Consumer packaged goods - higher safety stock levels, adjustments. Re-evaluation of the packaging and package waste regulation (PPWR) requested, not in effect yet, but if it is, this might have a severe impact. Focus to be placed on food security.
- Alexander Döring - FEFAC. Two key points - essential feed additive supplies. Amino-acids and vitamins double digit increases. Dependency on China. Some buffers/stockpiling, higher amounts of working capital, and impact on preservation. Anti-dumping duties on certain products. Also, effects on next seasons (Mid-term outlook).
- DK authority/ DVFA: Food contact material, price increase of 15-30% on PP/PE products. Some FCM are coming from the Middle East.
- COCERAL/ Iliana Axiotiades. Energy cost impacting origin countries such as Brasil. Fertilizers - farmers had bought them but they do not all have storage capacity. Thousands of vessels are blocked. Request to explore possibilities at the level of the Black Sea grains initiative.
- EUROCOMMERCE/ Niccolo Ciulli. Reopening of contracts, after summer for impact assessment on consumers. Ability of actors to absorb the cost is a question mark. Measures to control consumer prices - caution for price caps and margin caps. They never work.
- Agricultural machinery industry: Jelte Wiersma. Very difficult period for the industry because of dependencies.
- Bernard Valluis - EFM (EU Flour Millers). Diversification of inputs.
- JRC/ Giampiero Genovese – More quantitative data on storage/ stock piling of fertilisers at farmer level would be interesting

### **Relevant meetings:**

Next week Dialogue Fertilizers

May Fertiliser action plan

22/04/2026 - EFSCM stockpiling focus meeting

Ad hoc EFSCM meeting as a follow-up meeting in the course of April/ to be scheduled.