Feed Acidifiers Market - Growth, Trends, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 126 pages | Mordor Intelligence

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Report description:

The feed acidifiers market is projected to register a CAGR of 7.2% during the forecast period.

Key Highlights
Animal feed acidifiers are organic acids incorporated into the feed for nutritional or preservative purposes. Acidifiers enhance congestion and microbiological balance in the alimentary and digestive tracts of livestock. The market is characterized by strong demand for top-quality feed acidifiers for poultry, especially in industrialized countries, which have improved living standards than other countries. Only around 38% of the feeds are based on a single acid. Most products are based on organic acid blends containing two or three acids. A combination of more than three products is rare. Formic and propionic acids are the most used components. Citric, lactic, sorbic, malic, acetic, and fumaric acids are other major acids used as acidifiers in poultry feed. While benzoic, butyric, tartaric, and sorbic acids are not commonly used. However, the effects seen when using organic acids highly depend on the type of organic acid used and the inclusion level of the acids used. Furthermore, for preserving purposes, inclusion levels of organic acids are lowered for performance promotion.
The main restraints of the industry are the emergence of substitute products, such as metabolic peptides, microflora enhancers, and herbal products. However, the increasing use of feed acidifiers for treating poultry diseases creates opportunities for poultry feed acidifiers. Manufacturers are developing innovative production techniques to manufacture the products at a lower cost and increase their production capacity.
Strong demand from the poultry industry and the ban on antibiotics to secure the supply of safe food are expected to result in an increased demand for poultry feed acidifiers. Moreover, the ban on antibiotics within the European Union moved acidifiers to the center of attention, as they are the next most adequate alternative to the use of antibiotics. However, the market generally seems to shift more from the usage of pharmaceutical products to natural feed ingredients in animal feed, including poultry. In this region, single organic acids have been used as feed preservatives for a long time. The most popular single organic acids used are formic and propionic acids. However, the usage of organic acids, like feed additives, started to become popular in the last decade due to the upcoming ban on antibiotics within the European Union.

Feed Acidifiers Market Trends

Increasing Animal Feed Production

According to the FAS-USDA report, animal production is increasing every year to meet the growing demand for animal products, including eggs, meat, and milk leading to an increase in the consumption of animal feeds. According to Alltech's global feed production survey, global animal feed production had been 1,207.9 million metric tons in 2020, reaching 1,235.5 million metric tons by 2021. This rise in animal feed production is expected to drive the animal feed acidifier market in a positive trend.

Poultry is one of the fastest-growing segments of the agricultural sector at present. The poultry sector has undergone major structural changes during the past two decades due to the introduction of modern intensive production methods, genetic improvements, improved preventive disease control and biosecurity measures, increasing income and human population, and urbanization. The increase in poultry meat consumption has been most evident in East and Southeast Asia and Latin America, particularly in China and Brazil. A range of factors has helped boost the broiler business, including an increase in home cooking during the pandemic, and it is a relatively affordable option compared to other proteins. Global poultry meat production soared in recent years to meet the growing demand. According to the FAO estimates, the total production of poultry meat in the world in 2020 increased to 133.4 million metric tons. This amounts to almost half the growth rate in 2019. China, the United States, Brazil, South Africa, and Mexico are thought to have the largest share of production growth in 2020. The increased feed production for increased growth meets this increase in production.

Additionally, organic acids are considered an appealing alternative for improving nutrient digestibility in poultry. The incorporation of organic acids also leads to thinning of the intestinal lining, which facilitates better absorption of nutrients and their efficient utilization. Studies showed that the egg production of hens significantly increased more quickly in dietary organic-acid-supplemented groups compared to the control group. Industrial-scale poultry production requires optimum use of high-quality feed to improve efficiencies in the production process, improve feed conversion ratios, and enhance animal muscle mass and protein content. Thus, this is expected to boost the market during the forecast period.

Europe Dominates the Market

Europe holds the largest share of the feed acidifiers market. The meat consumption rate in the United Kingdom is high. Chicken is among the most commonly consumed meat in the country. To meet the consumption demand for animal meat in the country, the growing demand for feed and feed acidifiers is observed among all the livestock segments, with poultry being ahead of ruminants and swine. In 2020, the reduced demand for poultry meat was observed in the country due to the shutdown measures during the pandemic. The reduced demand is attributed to less demand from the food service sector and lesser functioning of the UK meat processing plants. However, the high demand from retail was observed by the end of 2020.

Considering the various research studies indicating the positive impacts of the application of organic acids with essential oils on broiler performance, the use of organic acids, in the United Kingdom, as a potential alternative to antibiotic growth promoters (AGPs) has increased over the years. They are added to poultry diets and drinking water to elicit a positive growth response, improving nutrient digestibility. Propionic acid, formic acid, and acetic acid are potent organic acids generally used to kill mold on feed. Additionally, various disease outbreaks in livestock animals in France, such as Avian flu, in the past decade have led to increased regulations on meat quality and safety, which, in turn, is expected to boost the use of feed acidifiers as an alternative to antibiotics growth promoters in the coming years.

With many leading compound feed manufacturers based in the United Kingdom and Germany, the demand for feed acidifiers has also been increasing in this region. Selko by Trouw nutrition is a well-established feed additive brand in the United Kingdom. The

major firms manufacturing feed acidifiers in Germany include Dr. Eckel, BASF SE, Trouw Nutrition, and ADDCON GmbH. Along with this, with the increased demand, the prices of organic acids increased over the years. BASF SE increased the price of formic acid and propionic acid in Europe by EUR 100 (USD 99.4) per metric ton and EUR 150 (USD 149) per metric ton, respectively, in 2021.

Feed Acidifiers Market Competitor Analysis

The feed acidifiers market is a concentrated market with a few major players, including Alltech Inc., Cargil Inc., BASF SE, Yara International, Trouw Nutrition, and Biomin. The most adopted strategies by these major players to expand their business are mergers and acquisitions, expansions, and investments in R&D.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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