

Africa Feed Additives - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Africa Feed Additives Market size is estimated at USD 1.78 billion in 2024, and is expected to reach USD 2.15 billion by 2029, growing at a CAGR of 3.85% during the forecast period (2024-2029).

- In 2022, the African feed additives market accounted for USD 1.65 billion, an increase of 5.0% during 2017-2022. There was a sudden dip in 2019, mainly due to collapsed GDP growth of major countries like South Africa, where the spending power of consumers reduced drastically. Hence, feed production reduced drastically in the region in 2019.
- Among feed additives, amino acids are largely used in animal feeds. In 2022, amino acids accounted for USD 408 million of the African feed additives market. Amino acids were largely consumed by poultry birds, accounting for 57% of the total amino acids market in the region. Amino acids are used to synthesize proteins, and lysine and methionine are the most crucial amino acids used for animals' growth and health maintenance.
- In 2022, feed binders were the second most consumed feed additives in the region, accounting for USD 219.7 million of feed additives. Feed binders are used to strengthen pellets, improve pellets' integrity, durability, and stability, reduce nutrient leaching, and prevent fragmentation of pellets during handling, transportation, and storage.?
- Minerals, probiotics, prebiotics, acidifiers, and mycotoxin detoxifiers are the major feed additives widely used in the region, accounting for USD 186, 121.5, 116.4, 116.3, and 101.8 million share values of the African feed additives market, respectively. These feed additives help improve growth performance, enable easy absorption of nutrients, and maintain the animals' gut health. ?
- With the expansion of the meat industry and increasing demand for quality meat and animal-based products, the demand for

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healthy diets has increased significantly. Thus, the demand for feed additives in the region is anticipated to increase, registering a CAGR of 3.9% during 2023-2029.

- The African feed additives market saw significant growth in recent years, with a market value of USD 1.65 billion in 2022, accounting for 5.0% of the global feed additives market value. This growth is expected to continue, with an estimated 25.7% increase between 2023 and 2029, as the demand for meat and meat products continues to rise in the region. However, in 2019, the market declined by 23.5% compared to 2018 due to the Avian flu and African swine flu incidence in the region, leading to reduced feed production.
- South Africa was the largest country in the region in terms of market value, with around USD 0.75 billion in 2022. The country's moderately higher feed production and penetration rates contributed to its higher market share. South Africa was also the fastest-growing country in the region, with a CAGR of 4.5% during the forecast period.
- Poultry birds were the largest animal type in the region, accounting for 54.9% of the total feed additives market value in 2022 due to an increase in the demand for poultry meat and the benefits of additives in promoting animal growth. Ruminants were the second-largest animal type, with a market share of 32.8% in 2022.
- Broilers, layers, and dairy cattle were the largest animals in the region, occupying 34%, 20%, and 19% of the market share in 2022, respectively. The usage of feed additives increases the meat content of these animals, which was a significant driving factor in the usage of additives in these animals.
- The growing demand for meat and meat products, along with an increase in investments in the production of animals, is expected to drive the feed additives market in the region, registering a CAGR of 3.9% during the forecast period.

Africa Feed Additives Market Trends

The increasing per capita consumption of poultry meat and eggs with higher profit margins which is increasing the poultry production in Africa region

- The African poultry industry plays an important role in commercial activities and in providing quality protein to subsistence farmers and rural communities. Poultry birds accounted for 61.5% of the total animal headcount in Africa in 2022, primarily due to the rising demand for poultry meat and eggs in the region. The number of poultry birds increased by 8.8% from 2017 to 2.2 billion heads in 2022, driven by the growth of poultry farms in the region.
- Among poultry birds, broilers were highly raised due to the increasing demand for meat in the region. In South Africa, chicken meat production increased from 1,570 thousand metric tons in 2021 to 1,577 thousand metric tons in 2022 as major producers invested in the industry to capitalize on higher international and domestic poultry prices and profit margins.
- The African poultry industry is expanding due to the growing demand for poultry products from key importing countries, leading to increased investments in poultry farming. In 2021, Quantum Foods, one of South Africa's largest poultry producers, invested over USD 14 million in its poultry operations, including constructing hatcheries and upgrading broiler farms to boost productivity.
- The per capita consumption of poultry meat in South Africa rose to 35.09 kg in 2022 from 33.7 kg in 2017, and it is expected to grow by 7.5% during the forecast period (2023-2029), driven by the increasing prices of other animal proteins like beef and lamb. These factors are projected to increase the number of farms and headcount during the forecast period (2023-2029).

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Expansion of integrated fish farming and development of inland fisheries is increasing the demand for compound aqua feed

- Aquaculture farming has become one of the largest industries in the agriculture sector in many countries across Africa. Due to unfavorable climatic conditions and a reduction in fish catch, the usage of compound feed in the region decreased by 60% in 2019 compared to the previous year. The increase in freshwater and marine aquaculture farming in the region caused a surge in demand for compound feed, which grew by 152% from 2019 to reach 1.5 million metric tons in 2022. Despite this increase, aquaculture feed production accounted for 4.3% of the total feed production in the region in 2022.
- The rise in aquaculture production in recent years is credited to a significant expansion in the application of nutritional feed, including the use of extruded feed and improved farm management practices, as well as an increase in investments, which led to a 1.3% increase in the production of compound feed from 2020 to 2022. The Egyptian aquaculture feed industry underwent rapid development, with a shift from conventionally pelleted feeds (10%) to high-quality extruded feeds (90%). The Fish Farming Development Fund and similar government schemes in other countries, such as Nigeria, are expected to drive aquaculture farming in the region, thereby increasing feed production.
- Egypt's fisheries and aquaculture development plan aims to increase fish production to 3 million metric tons by 2025 through the expansion of integrated fish farming, development of inland fisheries, and mega-national productions. Thus, an increase in aquaculture production, a rise in the usage of high-quality extruded feed, and an increase in investments are expected to drive feed production in the region.

Africa Feed Additives Industry Overview

The Africa Feed Additives Market is fragmented, with the top five companies occupying 16.14%. The major players in this market are Adisseo, Archer Daniel Midland Co., DSM Nutritional Products AG, Evonik Industries AG and SHV (Nutreco NV) (sorted alphabetically).

Additional Benefits:

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

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