

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

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Report description:

The Brazil Feed Additives Market size is estimated at USD 2.42 billion in 2024, and is expected to reach USD 3.03 billion by 2029, growing at a CAGR of 4.60% during the forecast period (2024-2029).

- In Brazil, amino acids, binders, minerals, probiotics, and prebiotics dominate the livestock feed market. They cumulatively accounted for 60.6% of the total feed additives market in 2022. However, the market experienced a decline in 2020, mainly due to decreased feed production resulting from the impact of the COVID-19 pandemic. The pandemic led to disruptions in supply chains, lockdowns, and physical distancing, causing feed production to decrease by 23.8% in 2020 compared to the previous year.

- Amino acids are a significant contributor to the feed additives market in South America. They accounted for 18.1% of Brazil's feed additives market value in 2022. Among amino acids, lysine is crucial for animal nutrition. It accounted for 39.6% of Brazil's feed amino acids market value in 2022.

- Synthetic binders improve the quality of feed by increasing pellet durability and promoting better digestion and nutrition intake in animals. In 2022, synthetic binders held 62.9% of Brazil's total feed binders market value.

- Poultry was the largest consumer of feed minerals, accounting for 41.5% of Brazil's feed minerals market in 2022, attributed to the country's rising poultry population and feed production, which increased by 9.1% from 2017 to 2022.

- Antioxidants are added to feed to increase its shelf life by preventing lipid peroxidation and oxidative rancidity during production, processing, and storage. The demand for antioxidants is projected to drive the market at a CAGR of 5.2% during the forecast period.

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- Despite the challenges faced by the Brazilian feed additives market due to the pandemic, it is expected to rebound and grow in the coming years.

Brazil Feed Additives Market Trends

Brazil's poultry population is increasing due to high export demand for chicken as 33% of the produced chicken is exported and increasing poultry farming in the country

- Brazil's poultry industry is witnessing a surge in production and exports due to the increasing demand for animal protein globally. As of 2022, Brazil was the world's largest poultry exporter and the third-largest producer. Poultry production increased by 1.8% from 2021 to 2022 due to rising domestic and global demand for poultry products. With the country's increasing population, poultry meat consumption is also growing significantly. In 2022, the consumption of poultry meat in Brazil amounted to around 10.3 million metric tons, an increase from 9.6 million metric tons in 2018.
- Brazil produced around 14.6 million metric tons of chicken in 2021, with approximately one-third of the production exported to over 150 countries worldwide. Most Brazilian chicken exports come from smallholder chicken producers, with China being the main export destination. The global demand for Brazilian poultry products increased, particularly in major export destinations, due to avian influenza's impact in several territories.
- Poultry farming is gaining importance in Brazil as it provides high yields and quick returns on investment and requires less capital and minimal labor. Therefore, poultry production is anticipated to increase significantly during the forecast period (2023-2029).
- Brazil's poultry industry is well-positioned to benefit from the rising global demand for animal protein. Producers are expected to ramp up production to cater to the growing demand for poultry products.

Fish farming is dominating the aquaculture farming and expansion of aqua farms with more than 200,000 fish farms is leading to high demand for aqua feed in the country

- In 2022, the country accounted for 28.3% of South America's aquaculture feed production, producing 1.4 million metric tons of aquaculture feed, with a 57.5% increase from 2017 to 2022, primarily driven by the rising consumption of seafood.
- The expansion of aquaculture farming in Brazil, which is primarily focused on freshwater, boosted the demand for compound feed. With over 200,000 fish farms and 3,000 shrimp farms, the country's aquaculture industry is projected to grow continuously. Brazil has approximately 100 aquaculture R&D institutions.
- Fish farming dominates aquaculture production in Brazil, accounting for over 80% of the total aquaculture production. In 2020, the country produced 630.2 thousand metric tons of aquaculture species, up from 565.2 million metric tons in 2017. Fish feed production increased significantly in response to the rising demand, reaching 1.3 million metric tons in 2020, a 56.2% increase compared to 2017. Fish feed is mainly used in tilapia and tambaqui farming sectors, which are the major produced fish species in the country.
- Shrimp feed production has also increased dramatically in recent years, with an 84.5% increase from 2018 to 2022, due to increasing shrimp production. Producers are benefiting from high-profit margins and rising export demand. White-leg shrimp

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species consume the majority of shrimp feed in the country due to their high production rates.

- Despite the increasing demand for compound feed, the market is facing challenges due to unfavorable conditions and high raw material prices. The rising awareness of healthy fish diets and increasing import and export demand are expected to drive the growth of compound feed production in the country.

Brazil Feed Additives Industry Overview

The Brazil Feed Additives Market is fragmented, with the top five companies occupying 32.99%. The major players in this market are Adisseo, Alltech, Inc., Archer Daniel Midland Co., DSM Nutritional Products AG and SHV (NutraCo NV) (sorted alphabetically).

Additional Benefits:

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

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