

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

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Report description:

The Europe Feed Additives Market size is estimated at USD 8.32 billion in 2024, and is expected to reach USD 10.33 billion by 2029, growing at a CAGR of 4.42% during the forecast period (2024-2029).

- Europe is one of the major regions for the feed additives market globally. In 2022, amino acids, binders, minerals, prebiotics, probiotics, and acidifiers were the major feed additive types used in livestock feed in Europe, accounting for 70.2% of the total feed additives market in terms of value.
- Amino acids are the building blocks of proteins and play a crucial role in the growth and development of animals. Amino acids dominated the European feed additives market with a value of USD 1,906.9 million in 2022, which is anticipated to grow, registering a CAGR of 4.5% during the forecast period.
- In 2022, binders were the second major additive type consumed in Europe, and their market share increased by 9.7% between 2017 and 2022. Binders are used to bind various feed components, ensuring that pellet integrity is maintained during subsequent activities, strengthening feed pellets, and preventing pellet fragmentation. ?
- In Europe, the acidifiers segment is one of the fastest-growing, with an expected CAGR of 4.9% during the forecast period. The high growth rate is associated with characteristics of acidifiers in improving feed performance in animal nutrition and decreasing the uptake of pathogenic organisms and toxic metabolites. ??
- In Europe, minerals accounted for 10.8% of the region's feed additives market value in 2022. Among minerals, macrominerals held a major market share of 89.4% in 2022 due to their benefits in stressful circumstances that change an animal's physiological requirements.

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- The total feed production in Europe increased by 2.0% between 2017 and 2022. Thus, due to the increased feed production, the feed additives market in the region is anticipated to grow, registering a CAGR of 4.4% during the forecast period.

- The feed additives market in Europe, which accounts for 23.2% of the global feed additive market, is valued at USD 7.64 billion and is expected to record a CAGR of 4.4% during the forecast period. The primary driver for this growth is the increasing feed production in the region, which grew by 1.9% from 2017 to 2022, reaching 262.9 million metric tons.?

- Spain dominated the feed additive market in Europe, with a market value of USD 1.2 billion in 2022 and is expected to record a CAGR of 4.7% during the forecast period. In Spain, amino acids were the most highly consumed additives, accounting for 24.9% of the country's feed additive market value in 2022. The swine segment was the largest consumer of feed additives in Spain, accounting for 54.5% of the market in 2022, driven by a 15% increase in swine headcount from 2017 to 2020.?

- Germany has the second-largest market for feed additives in Europe, with the swine segment dominating the market and accounting for 36.4% of the total value. Amino acids and binders held the largest market share in Germany, accounting for 23.6% and 13.3% of the feed additive market value in 2022, respectively.?

- On the other hand, Turkey had the lowest feed additive market share in Europe, with a market value of USD 332.5 million in 2022. Various regulatory frameworks, unstable economies, and rising operational expenses are the major restraints in the country's feed additive market.??

- The United Kingdom is the fastest-growing country in the region, registering a CAGR of 5.1% during the forecast period, followed by Russia with a CAGR of 4.8%. The swine population in Russia increased by 15% headcounts between 2017 and 2020. Therefore, the increasing use of feed additives to meet the nutritional needs of animals is expected to drive the feed additive market in Europe.

Europe Feed Additives Market Trends

Europe is 3rd largest exporter of poultry meat and broiler meat production accounted for 82.6% of poultry meat production which is expected to drive the demand for poultry production

- Europe is a prominent global poultry meat producer and exporter, with an estimated annual poultry meat production of approximately 13.4 million metric tons in 2021. Despite being the second most consumed meat in the region at 26.9 kg per capita per year, poultry production within Europe has not kept pace with rising global demand. The largest poultry meat producers in Europe include Poland (accounting for 19.2% of production, or 2.5 million metric tons), France (12.5%, or 1.6 million metric tons), Spain (12.3%), Germany (12%), and Italy (10.4%).

- In the European Union, broiler meat production constituted the majority (82.6%) of total poultry meat production in 2021, followed by duck meat at 3.3%. Europe's poultry flock accounted for approximately 2.45 billion birds in 2021, with Russia, France, the Netherlands, Ukraine, Poland, and the United Kingdom collectively comprising more than 50% of the population. The laying hen segment is experiencing growth across Europe due to increased egg consumption, which rose to 6,135 thousand metric tons in 2021 from 5,864 metric tons in 2017.

- As the fourth-largest importer and the third-largest exporter of poultry meat, Europe is a significant participant in the global poultry meat market. In 2021, the European Union exported roughly 2,252 thousand metric tons (carcass weight) of poultry meat to various countries, including the United Kingdom, Ghana, Ukraine, and others. Overall, the rising production of poultry birds, increasing demand for poultry products, and growing consumption of eggs are expected to be the key drivers of market growth in

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Europe.

High demand for fish feed which accounted for 82% and surge in seafood imports had a negative impact on compound feed for aquaculture

- In 2022, Europe held a significant share of 8.0% in the global aquaculture compound feed production, with a production volume of 4.5 million metric tons. Compound feed production saw a notable increase of 15% during 2018-2022, driven by the growing demand for nutrient-balanced feed to reduce the risk of diseases and improve feed efficiency. However, aquaculture feed production observed a decline of 21.2% in 2018, which may have been influenced by the surge in seafood imports and the relatively low prices of imported seafood, impacting the compound feed market in 2018.

- The major aquaculture feed producers in Europe are Turkey, the United Kingdom, the Netherlands, Spain, Italy, and France, with the region producing 17.4 million metric tons of aquaculture species in 2021, indicating a growth of 1.7% since 2018. The growth is attributed to the rise in population and per capita consumption of seafood, which is driving aquaculture production in the region. This trend is propelling the demand for compound feed, which is expected to increase by 18.2% during the forecast period.

- Fish feed dominates the aquaculture feed production, accounting for 82% share in 2022, followed by shrimp feed and other aquatic species feed, with shares of 4.3% and 13.7%, respectively, in the region. Fish food is the most consumed aquatic food across the region, and it is highly produced compared to other aquatic species. The expanding aquaculture sector, driven by the rising demand for seafood and aquaculture products, and the growing awareness regarding quality meat are the major factors augmenting the growth of the market studied.

Europe Feed Additives Industry Overview

The Europe Feed Additives Market is fragmented, with the top five companies occupying 34.88%. The major players in this market are Archer Daniel Midland Co., BASF SE, Cargill Inc., 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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