

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

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Report description:

The Europe Feed Amino Acids Market size is estimated at USD 2.08 billion in 2024, and is expected to reach USD 2.59 billion by 2029, growing at a CAGR of 4.48% during the forecast period (2024-2029).

- Feed amino acids have become a vital component of the European feed additives market, with a market share of 24.9% in 2022, primarily due to their role in promoting animal growth and protein synthesis. Lysine and methionine have traditionally been the largest feed amino acid sub-additives in the region, owing to their ability to improve efficiency characteristics such as gut health and digestion in animals.
- However, methionine and tryptophan are expected to register the fastest growth among feed amino acids in the region, with CAGRs of 4.8% and 4.7%, respectively, during the forecast period. This growth can be attributed to the increasing demand for meat and meat products, coupled with a growing awareness of the usage of additives that promote animal growth as a crucial attribute in commercial farming.
- Spain was the largest market for feed amino acids in the region, accounting for 15.7% of the market share in terms of value. France, Germany, and Russia followed with market shares of 14.4%, 13.7%, and 11.3%, respectively, in terms of value in 2022. These countries have higher market shares due to the higher demand for meat and meat product consumption and production.
- Poultry birds are the largest animal type with respect to the feed amino acids market in 2022, accounting for a market share of 34.9% due to an increase in demand for poultry meat and eggs.
- In conclusion, the increasing demand for meat and meat products, combined with growing awareness of the benefits of additives that promote animal growth, is expected to drive the feed amino acids market in Europe at a CAGR of 4.5% during the forecast

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period.

- In 2022, amino acids represented a significant proportion of the European feed additives market, accounting for around 5.3% of its total value and 1.1% of its total volume. This growth is attributed to the increasing demand for animal-derived protein and the ability of amino acids to enhance the quality and productivity of animal products.
- Spain dominated the feed amino acids market in Europe, with a market value of USD 299.9 million in 2022, which is expected to register a CAGR of 5.0% during the forecast period. Lysine and methionine were Spain's most consumed amino acids, accounting for 31.4% and 28.4% of the market value, respectively, in 2022.
- On the other hand, France has a long-standing market for feed amino acids and accounted for the second-largest share in Europe in 2022, at USD 274.1 million.
- Among all the animal types, poultry birds were the largest animal type, accounting for 34.9% of the market share in 2022 in Europe, followed by swine and ruminants, which accounted for 33.1% and 28% of the market share, respectively. This trend is directly related to the increased feed production in the region utilizing more amino acids.
- The United Kingdom and Russia were the fastest-growing markets in Europe, with registered CAGRs of 5.1% and 5.0% during the forecast period, respectively. The driving factors are the growing livestock and feed production rates. For instance, the swine population in Russia increased by 15.0% between 2017 and 2020.
- Between 2017 and 2022, overall feed production in Europe increased by 1.9%. As a result, with feed production and animal population growth, the feed amino acids market is expected to register a CAGR of 4.5% during the forecast period.

Europe Feed Amino Acids 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 was a major producer and exporter of poultry meat globally, with an estimated annual production of approximately 13.4 million metric tons in 2021. Despite being the second most consumed meat in the region, with a consumption rate of 26.9 kg per capita per year, poultry production in Europe has not kept pace with rising global demand. Poland is the largest producer of poultry meat in the region, accounting for 19.2% of production or 2.5 million metric tons, followed by France (12.5%), Spain (12.3%), Germany (12%), and Italy (10.4%).
- Broiler meat production constituted the majority (82.6%) of total poultry meat production in the European Union in 2021, followed by duck meat at 3.3%. Europe's poultry flock numbered 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 from 5,864 metric tons in 2017 to 6,135 thousand metric tons in 2021.
- Europe is the fourth-largest importer and the third-largest exporter of poultry meat globally. 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, and Ukraine. Overall, the increasing production of poultry birds, rising demand for poultry products, and growing consumption of eggs are expected to be key drivers of market growth in the European region.

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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 global aquaculture compound feed production, with a production volume of 4.5 million metric tons. The compounded feed production witnessed a notable increase of 15% between 2018 and 2022, driven by the growing demand for nutrient-balanced feed to reduce the risk of disease 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 aqua feed producers in the European region are Turkey, the United Kingdom, the Netherlands, Spain, Italy, and France. The region produced 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, in turn, is propelling the demand for compound feed, which is expected to increase by 18.2% during the forecast period (2023-2029).

- Fish feed dominates aqua feed production, accounting for an 82% share in 2022, followed by shrimp feed and other aquatic species feed, with a share 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 Amino Acids Industry Overview

The Europe Feed Amino Acids Market is moderately consolidated, with the top five companies occupying 51.25%. The major players in this market are Adisseo, Archer Daniel Midland Co., Evonik Industries AG, IFF(Danisco Animal Nutrition) 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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