

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

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Report description:

The Europe Feed Enzymes Market size is estimated at USD 315.80 million in 2024, and is expected to reach USD 394.26 million by 2029, growing at a CAGR of 4.54% during the forecast period (2024-2029).

- The enzyme segment held a share of 3.8% in the European feed additives market in 2022. Enzymes play a crucial role in many metabolic reactions, including the breakdown of starch, protein, and fat, in the animal body, leading to their widespread usage in animal feed.
- Carbohydrases are the largest segment of the feed enzymes market in Europe, accounting for USD 133.6 million in 2022. They are projected to grow further, registering a CAGR of 4.6% during the forecast period. These enzymes are crucial in reducing the cost of animal feed due to their ability to boost energy and digest starch, releasing the molecules that make up an animal's usable source of energy.
- In 2022, poultry birds were the largest animal type segment in the region, accounting for 34.8% of the market share value in the European feed enzymes market, followed by swine (32.3%) and ruminants (29.1%). The higher usage of feed enzymes in poultry birds is due to their high consumption of cereals with high non-starch polysaccharide content, which requires enzymes for digestion.
- Phytases are the second-largest segment in the feed enzymes market, accounting for a market value of USD 96.4 million in 2022. The increasing demand for animal protein and the benefits of enzymes are driving the market in a positive trend.
- Spain was the largest country in the European feed enzymes market in 2022, with a share of 15.3%. This high share is attributed to the country's high feed production of 31.8 million metric ton in 2022, reflecting an increase of 0.8% from 2020.

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- Owing to the increased feed production and the importance of feed enzymes in animal nutrition, the feed enzymes market in Europe is anticipated to grow, registering a CAGR of 4.5% during the forecast period.

- The demand for feed enzymes in Europe is expected to rise significantly in the coming years due to their crucial role in animal metabolism and digestion. In 2022, feed enzymes accounted for 3.8%, by value, and 2.1%, by volume, of the European feed additive market.

- Spain is the largest feed enzyme consumer in Europe, and it had a market value of USD 44.3 million in 2022. This value is expected to increase to USD 61.5 million by 2029, while recording a CAGR of 4.8%. The extensive usage of feed enzymes in Spain is mainly due to the high livestock population and compound feed production in the country. For instance, the total swine feed production in the country increased by 1.9% from 2017 to 2022.

- Germany is the second-largest feed enzymes market in Europe, and it is expected to record a CAGR of 4.2% during the forecast period. The market is projected to reach a value of USD 58.7 million by 2029, rising from USD 44.1 million in 2022. Carbohydrases and phytases are the most extensively consumed feed enzymes in Germany, and they had market shares of 47.0% and 33.3%, by value, in 2022, respectively. ?

- The United Kingdom is the fastest-growing feed enzymes market in the region. Its market value was USD 29.6 million in 2022, and it is expected to record a CAGR of 5.2% during the forecast period. This growth is associated with the increased livestock population in the country, particularly the poultry population, which increased by 8.5% between 2017 and 2022.

- Overall, the total feed production in Europe increased by 1.9% from 2017 to 2022, indicating an increased animal population. Consequently, the European feed enzymes market is anticipated to register a CAGR of 4.5% during the forecast period, driven by increased feed production and animal population.

Europe Feed Enzymes 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 ton in 2021. Despite being the second most-consumed meat in the region, at 26.9 kg per capita per year, poultry production in 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 ton), France (12.5%, or 1.6 million metric ton), 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's segment is experiencing growth across Europe due to increased egg consumption, which rose to 6,135 thousand metric ton in 2021 from 5,864 metric ton 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 ton (carcass weight) of poultry meat to a variety of countries, including the United Kingdom, Ghana, and Ukraine. Overall, the rising production of poultry birds, increasing demand for poultry products, and growing consumption of eggs are expected to be 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 ton. The compounded feed production experienced a notable increase of 15% between 2018-2022, 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, 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 Europe are Turkey, the United Kingdom, the Netherlands, Spain, Italy, and France, with the region producing 17.4 million metric ton 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 is propelling the demand for compound feed, which is expected to increase by 18.2% during the forecast period (2023-2029).

- Fish feed dominates the aqua feed production market, accounting for an 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 produced more than other aquatic species. The expanding aquaculture sector, driven by the rising demand for seafood and aquaculture products and the growing awareness regarding quality meat, is augmenting the growth of the market studied.

Europe Feed Enzymes Industry Overview

The Europe Feed Enzymes Market is moderately consolidated, with the top five companies occupying 46.93%. The major players in this market are Archer Daniel Midland Co., BASF SE, Brenntag SE, DSM Nutritional Products AG and IFF(Danisco Animal Nutrition) (sorted alphabetically).

Additional Benefits:

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

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