

Germany Compound Feed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Germany Compound Feed Market size is estimated at USD 15.77 billion in 2024, and is expected to reach USD 18.37 billion by 2029, growing at a CAGR of 3.10% during the forecast period (2024-2029).

Key Highlights

- The demand for red meat in Germany's compound feed sector is growing with the popularity of meat and meat products. It is quickly increasing, owing to consumer preferences for a protein-rich diet and lower meat prices in the country. The low prices of meat drive consumers' spending power in the meat industry. The growing demand for animal products and processed meat has allowed feed makers to boost animal productivity.
- According to the Federal Agency for Agriculture and Food, Germany produced 8.47 million metric tons of meat in 2021, down by 1.6% (142,000 metric tons) from 2020. On the other hand, poultry meat production decreased by 1.7% to 1.64 million metric tons owing to the rising largest bird flu epidemic observed in the European Union countries, including Germany. As per Eurostat, over 2,467 outbreaks were reported in poultry in 2021, resulting in the slaughter of 48 million domestic birds in 37 countries, and in Germany, 2.3 million birds were destroyed in 2021. The rising awareness of the bird vaccination program to eradicate bird flu is expected to boost the growth of meat consumption and compound feed requirement in the poultry houses in the country during the coming years.
- Germany is known as the European Union's largest dairy producer, yet it has undergone rapid and far-reaching structural changes in recent decades. Germany witnessed a vigorous consolidation process in which the number of farms has fallen significantly, the remaining farms have grown, and overall milk output has increased due to increasing milk production per cow. German dairy farmers also had to contend with rising production costs.
- According to the Federal Agricultural Information Center (BZL), 281 companies harvested 22.9 million metric tons of compound feed in 2022 (23.9 million metric tons in the previous year). The pig feed category occupied the largest compound feed production

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with 9.1 million metric tons, followed by cattle feed with 6.5 million tons.

Germany Compound Feed Market Trends

Growing Consumer Preference Towards Meat and Other Animal Products

- The consumption of meat has been rising steadily across the world. The increasing population, urbanization, demographics, incomes, prices, and environmental and health concerns are key factors that influence the level and type of meat consumption. This is enhancing the demand for the compound feed market in the country. Livestock farmers need to produce high-quality and hygienic meat to satisfy the demand for the meat processing industry, which is a big challenge.
- According to the Food and Agriculture Organization (FAO), a total of 5.12 million pigs, cattle, sheep, goats, and horses were slaughtered in 2022, and the number of chickens, turkeys, and ducks was observed at 701.4 million.
- According to the Federal Agency for Agriculture and Food (BLE), Germany produced 8.47 million metric tons of meat in 2020, and poultry meat production reached approximately 1.64 million metric tons. The degrees of supply of the different meat subsectors stand at 125% in the case of pig meat, 94.6% in beef, and 97.2% for poultry meat. In the country, with regard to poultry meat, in the same time interval, an increase of 6 kg (+ 83%) was observed, reaching the figure of 13.3 kg per capita.
- The German meat processing industry has seen a rise in enterprise numbers in recent years. Among meat-eaters, whether they go to the meat counter in their local supermarket or a butcher, it is common to have very particular preferences on where to buy meat and what to buy, especially with increasing consumer awareness about manufacturing methods behind the products. As an industry in Germany, meat processing and preserving are expected to increase revenues significantly. However, compared to selected European countries, such as France, Italy, Spain, and the United Kingdom, Germany currently has the highest per capita meat consumption.

Cereal Ingredients Dominates the Compound Feed Market

- Cereals are the most common and widely used ingredient in compound feed worldwide. Corn, barley, and sorghum are the most common cereal ingredients used in manufacturing compound feed. The cultivation of Maize in Germany is undertaken primarily to produce feed for cows, pigs, and poultry (maize for silage including green maize, grain maize, corn cob mix, and coarse maize meal with husks). According to Food and Agriculture Organization (FAO), poultry stocks in Germany were 176.6 million birds in 2020.
- Corn is the most widely consumed feed grain, accounting for more than 50% of the total production and use, with major feed applications in the poultry industry. Corn as a feed ingredient in compound feed can increase egg production in poultry. This, in turn, stimulated the demand for corn as a feed ingredient in the country. The regular price fluctuations of various kinds of cereal owing to the difference in production in varied geographical regions substantially hamper the use of cereals in compound feed. However, due to their cost-effectiveness, cereal by-products are gaining traction across feed manufacturers.
- In the 2022 marketing year, 20.9 million metric ton of grains were used for animal feed in Germany (-16%), of which about 6.6 million ton was wheat and 5.1 million ton was barley and corn. Almost 23% of grain consumption in Germany was used for food production (+3%). In comparison, around 18% (-1%) went into energy and industrial uses, which will escalate the use of cereals in the animal feed industry in the coming years.

Germany Compound Feed Industry Overview

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The German compound feed market is consolidated, with a few prominent players holding most of the market share. ForFarmers, Cargill Inc, Trouw Nutrition Deutschland GmbH, Alltech Inc., and Royal Agrifirm Group are the prominent players in the market studied. As per the key developments observed during the review period, mergers and acquisitions and product launches are the most adopted strategies by the dominant players in the market. The leading companies focus on acquiring feed mills and small manufacturing units to expand their business in local and foreign markets. Moreover, the key players invest heavily in R&D to launch innovative products according to the customer's needs. These dominant players have also been expanding their businesses by adopting various strategies, such as expansions, partnerships, and product innovations.

Additional Benefits:

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

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