

## **India Feed Additives - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029**

Market Report | 2024-02-17 | 408 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The India Feed Additives Market size is estimated at USD 1.07 billion in 2024, and is expected to reach USD 1.37 billion by 2029, growing at a CAGR of 5.07% during the forecast period (2024-2029).

- In 2022, the Indian livestock feed industry witnessed strong demand for feed additives, with amino acids, binders, minerals, probiotics, and prebiotics comprising 60.5% of the market's total value. Lysine and methionine emerged as the leading amino acids in the country, accounting for 72% of the total feed amino acids market in 2022. This growth was attributed to improved animal efficiency, better gut health, and meat production.
- Synthetic binders dominated the market, accounting for 69.9% of the total binders market in 2022. These binders have become an essential component in animal feed as they enhance digestion and nutrition intake, besides being used in pellet feed and illness prevention.
- Poultry was the dominant animal type in the prebiotics market, representing 62.6% of the market share value in 2022. The growth of the poultry sector was fueled by increased feed intake and a 4% rise in headcount between 2017 and 2022.
- Antioxidants are projected to be the fastest-growing segment in the Indian feed additives market, with a CAGR of 6.1% during the forecast period of 2023-2029. They are increasingly used to extend the life of animal feeds. Antibiotics, such as citric acid, are essential in minimizing pathogen colonization, lowering the formation of harmful metabolites, and enhancing the availability of protein, Ca, P, Mg, and Zn.
- Therefore, due to the critical role of feed additives in animal nutrition, their demand is expected to rise during the forecast period. As a result, the industry will continue to witness an increase in the development and adoption of innovative feed additive

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

solutions to meet the evolving demands of the market.

## India Feed Additives Market Trends

Rising demand for poultry meat and egg consumption is increasing the poultry production but diseases such as Avian Influenza had negative impact on poultry population

- The Indian poultry industry has made significant progress, evolving from a small-scale backyard activity to a major industry and becoming one of the world's leading producers of eggs and broiler meat. The rise in poultry meat and egg consumption has driven a 7.1% increase in poultry production between 2017 and 2022. Furthermore, per capita consumption of poultry meat increased by 13.7% to 2.65 kg in 2022, and per capita availability of eggs increased to 91 eggs per year in 2021, four more units than the previous year.
- The Indian poultry market is concentrated in Andhra Pradesh, Tamil Nadu, and Telangana, which account for a significant portion of the country's production. India has also established itself as a significant player in the global market, exporting 320,240.46 metric tons of poultry products worth USD 71.04 million in 2021-22. Major importers of Indian poultry products include Oman, Maldives, Indonesia, Vietnam, Bhutan, Japan, and Russia.
- However, the Indian poultry industry faces several challenges. The outbreak of Avian influenza and other diseases has led to the culling of birds, resulting in significant financial losses for the industry. Additionally, the industry is plagued by issues such as high feed costs, inadequate processing and storage facilities, and limited access to credit, among others. To overcome these challenges, the industry requires significant investments in infrastructure and technology, as well as government support.
- Overall, the increasing demand for poultry meat in importing countries, coupled with rising domestic demand, led to a significant increase in poultry production in India. Furthermore, a shift in food habits, urbanization, and increasing awareness of balanced nutrition are expected to drive growth in the coming years.

India being third largest fish producing country and the surge in demand for seafood as well as the government's initiatives is increasing the aqua feed demand and production

- In recent years, India's aquaculture industry has experienced significant growth due to the surge in demand for seafood, leading to a sudden increase in the development of the aqua feed market. In 2022, the country's aquaculture feed production reached 2.2 million metric tons, a 48.6% increase from 2017-2022, primarily driven by the increasing aquaculture in India. Fish feed dominates the aqua feed market in India, accounting for 87% of the total aqua feed production in the country, followed by shrimp feed at 6.6% in 2022. The demand for fish is rising domestically and internationally, making it essential for the aqua feed market to maintain the demand for high-quality fish in the country.
- India is the world's third-largest fish-producing country, contributing to 7.96% of global production. In 2020-21, the country produced 14.7 million metric tons of fish. Andhra Pradesh is the largest fish-feed-consuming state in India, followed by West Bengal, owing to its high fish production in the country. Shrimp feed production grew by 75.6% from 2018, mainly due to the surging global demand for shrimp, leading to aqua feed manufacturers producing large quantities of shrimp feed to cater to the growing demand.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- The increasing demand for seafood, coupled with the government's initiatives and growing investments in the aquaculture sector, such as offering subsidies and incentives for the construction of new ponds, purchasing feeds, and setting up processing units, is expected to fuel the growth of the aqua feed market in India in the coming years. The expansion of the aqua feed market is expected to support the growth of the Indian economy, create employment opportunities, and contribute to food security.

## India Feed Additives Industry Overview

The India Feed Additives Market is moderately consolidated, with the top five companies occupying 41.99%. The major players in this market are Adisseo, Alltech, Inc., Archer Daniel Midland Co., 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

### Table of Contents:

#### 1 EXECUTIVE SUMMARY & KEY FINDINGS

#### 2 REPORT OFFERS

#### 3 INTRODUCTION

##### 3.1 Study Assumptions & Market Definition

##### 3.2 Scope of the Study?

##### 3.3 Research Methodology

#### 4 KEY INDUSTRY TRENDS

##### 4.1 Animal Headcount

###### 4.1.1 Poultry

###### 4.1.2 Ruminants

###### 4.1.3 Swine

##### 4.2 Feed Production

###### 4.2.1 Aquaculture

###### 4.2.2 Poultry

###### 4.2.3 Ruminants

###### 4.2.4 Swine

##### 4.3 Regulatory Framework

###### 4.3.1 India

##### 4.4 Value Chain & Distribution Channel Analysis

#### 5 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2029 and analysis of growth prospects)

##### 5.1 Additive

###### 5.1.1 Acidifiers

###### 5.1.1.1 By Sub Additive

###### 5.1.1.1.1 Fumaric Acid

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.1.1.1.2 Lactic Acid
- 5.1.1.1.3 Propionic Acid
- 5.1.1.1.4 Other Acidifiers
- 5.1.2 Amino Acids
  - 5.1.2.1 By Sub Additive
    - 5.1.2.1.1 Lysine
    - 5.1.2.1.2 Methionine
    - 5.1.2.1.3 Threonine
    - 5.1.2.1.4 Tryptophan
    - 5.1.2.1.5 Other Amino Acids
- 5.1.3 Antibiotics
  - 5.1.3.1 By Sub Additive
    - 5.1.3.1.1 Bacitracin
    - 5.1.3.1.2 Penicillins
    - 5.1.3.1.3 Tetracyclines
    - 5.1.3.1.4 Tylosin
    - 5.1.3.1.5 Other Antibiotics
- 5.1.4 Antioxidants
  - 5.1.4.1 By Sub Additive
    - 5.1.4.1.1 Butylated Hydroxyanisole (BHA)
    - 5.1.4.1.2 Butylated Hydroxytoluene (BHT)
    - 5.1.4.1.3 Citric Acid
    - 5.1.4.1.4 Ethoxyquin
    - 5.1.4.1.5 Propyl Gallate
    - 5.1.4.1.6 Tocopherols
    - 5.1.4.1.7 Other Antioxidants
- 5.1.5 Binders
  - 5.1.5.1 By Sub Additive
    - 5.1.5.1.1 Natural Binders
    - 5.1.5.1.2 Synthetic Binders
- 5.1.6 Enzymes
  - 5.1.6.1 By Sub Additive
    - 5.1.6.1.1 Carbohydrases
    - 5.1.6.1.2 Phytases
    - 5.1.6.1.3 Other Enzymes
- 5.1.7 Flavors & Sweeteners
  - 5.1.7.1 By Sub Additive
    - 5.1.7.1.1 Flavors
    - 5.1.7.1.2 Sweeteners
- 5.1.8 Minerals
  - 5.1.8.1 By Sub Additive
    - 5.1.8.1.1 Macrominerals
    - 5.1.8.1.2 Microminerals
- 5.1.9 Mycotoxin Detoxifiers
  - 5.1.9.1 By Sub Additive
    - 5.1.9.1.1 Binders
    - 5.1.9.1.2 Biotransformers

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 5.1.10 PhytoGenics
  - 5.1.10.1 By Sub Additive
    - 5.1.10.1.1 Essential Oil
    - 5.1.10.1.2 Herbs & Spices
    - 5.1.10.1.3 Other PhytoGenics
- 5.1.11 Pigments
  - 5.1.11.1 By Sub Additive
    - 5.1.11.1.1 Carotenoids
    - 5.1.11.1.2 Curcumin & Spirulina
- 5.1.12 Prebiotics
  - 5.1.12.1 By Sub Additive
    - 5.1.12.1.1 Fructo Oligosaccharides
    - 5.1.12.1.2 Galacto Oligosaccharides
    - 5.1.12.1.3 Inulin
    - 5.1.12.1.4 Lactulose
    - 5.1.12.1.5 Mannan Oligosaccharides
    - 5.1.12.1.6 Xylo Oligosaccharides
    - 5.1.12.1.7 Other Prebiotics
- 5.1.13 Probiotics
  - 5.1.13.1 By Sub Additive
    - 5.1.13.1.1 Bifidobacteria
    - 5.1.13.1.2 Enterococcus
    - 5.1.13.1.3 Lactobacilli
    - 5.1.13.1.4 Pediococcus
    - 5.1.13.1.5 Streptococcus
    - 5.1.13.1.6 Other Probiotics
- 5.1.14 Vitamins
  - 5.1.14.1 By Sub Additive
    - 5.1.14.1.1 Vitamin A
    - 5.1.14.1.2 Vitamin B
    - 5.1.14.1.3 Vitamin C
    - 5.1.14.1.4 Vitamin E
    - 5.1.14.1.5 Other Vitamins
- 5.1.15 Yeast
  - 5.1.15.1 By Sub Additive
    - 5.1.15.1.1 Live Yeast
    - 5.1.15.1.2 Selenium Yeast
    - 5.1.15.1.3 Spent Yeast
    - 5.1.15.1.4 Torula Dried Yeast
    - 5.1.15.1.5 Whey Yeast
    - 5.1.15.1.6 Yeast Derivatives
- 5.2 Animal
  - 5.2.1 Aquaculture
    - 5.2.1.1 By Sub Animal
      - 5.2.1.1.1 Fish
      - 5.2.1.1.2 Shrimp
      - 5.2.1.1.3 Other Aquaculture Species

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 5.2.2 Poultry
  - 5.2.2.1 By Sub Animal
    - 5.2.2.1.1 Broiler
    - 5.2.2.1.2 Layer
    - 5.2.2.1.3 Other Poultry Birds
- 5.2.3 Ruminants
  - 5.2.3.1 By Sub Animal
    - 5.2.3.1.1 Dairy Cattle
    - 5.2.3.1.2 Other Ruminants
- 5.2.4 Swine
- 5.2.5 Other Animals

## 6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).
  - 6.4.1 Adisseo
  - 6.4.2 Alltech, Inc.
  - 6.4.3 Archer Daniel Midland Co.
  - 6.4.4 BASF SE
  - 6.4.5 Cargill Inc.
  - 6.4.6 DSM Nutritional Products AG
  - 6.4.7 IFF(Danisco Animal Nutrition)
  - 6.4.8 Kerry Group Plc
  - 6.4.9 SHV (NutraCo NV)
  - 6.4.10 Solvay S.A.

## 7 KEY STRATEGIC QUESTIONS FOR FEED ADDITIVE CEOS

## 8 APPENDIX

- 8.1 Global Overview
  - 8.1.1 Overview
  - 8.1.2 Porter's Five Forces Framework
  - 8.1.3 Global Value Chain Analysis
  - 8.1.4 Global Market Size and DROs
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

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

Market Report | 2024-02-17 | 408 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-06-24
		Signature	

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)  
[www.scotts-international.com](http://www.scotts-international.com)