

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

Market Report | 2023-04-04 | 405 pages | Mordor Intelligence

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Report description:

The Indonesia Feed Additives Market size is estimated at USD 441.88 million in 2024, and is expected to reach USD 580.01 million by 2029, growing at a CAGR of 5.59% during the forecast period (2024-2029).

- The Indonesian animal feed industry relies heavily on amino acids, binders, minerals, and probiotics as feed additives, which accounted for 54% of the feed additives market in 2022. The market saw a significant increase of 23.8% in 2020 compared to 2019, driven by the surge in demand from international markets for aquaculture and swine production.
- In Indonesia, lysine and methionine were the most significant feed amino acids in terms of market value, accounting for 33.6% and 31.3%, respectively, in 2022. The high share of lysine and methionine is due to their efficiency characteristics, such as improved gut health, easy digestion, and enhanced meat production.
- Synthetic binders held the largest share in 2022, accounting for 67.1% of the total feed binders market in the country. Synthetic feed binders not only assist in pelleting the feed but also prevent diseases by improving digestion and nutrition intake in animals.
- Poultry birds were the primary animal types in the feed additives market, representing 56.8% of the market share value in 2022 due to their high feed intake and the larger feed production, which exceeded 10.4 million metric ton in 2022.
- The fastest-growing segment in the feed additives market is acidifiers, and it is expected to record a CAGR of 6.3% during the forecast period. Acidifiers promote growth, increase metabolism, and reduce dependence on antibiotics.
- Due to the importance of feed additives in animal nutrition, the demand for feed additives in the country is expected to record a CAGR of 5.6% during the forecast period (2023-2029).

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Indonesia Feed Additives Market Trends

High consumption of eggs is leading to growth in the poultry production to meet the increased demand for poultry products

- The poultry industry in Indonesia experienced both growth and decline in recent years. Due to the religious ban on consuming pork, chicken meat has become a major source of animal protein in the country, leading to an increase in poultry production. From 2017 to 2022, poultry chicken production in the country increased by 7.7%, reaching a record high of 3.7 billion bird count in 2022.
- However, the poultry industry faced a setback in 2020 when poultry production decreased by 6.2% from the previous year due to the farming ministry's orders for poultry breeders to cull down 4.4 million chickens and cut the number of hatching eggs by 7 million per week to control a slump in poultry prices.
- Despite the challenges, egg consumption in the country continues to rise due to changing diets and a search for lower-cost protein, leading to a shift in egg consumption. This factor is expected to drive the growth of layer production, thereby increasing the layer feed additives value by 44.3% from 2023 to USD 182.4 million in 2029. These additives play a significant role in increasing the productivity of eggs.
- Indonesian poultry production is expected to improve due to increasing consumption. For instance, the per capita poultry meat consumption increased by 7.1% from 2017 to 8.21 kg in 2022, and it is projected to reach 9.01 kg in 2027 due to the rising demand for animal protein.
- The increasing export demand is also creating opportunities for expanding poultry production. Indonesia hopes to export chicken to Singapore to fill the gap vacated by Malaysia's poultry export ban. This rising per capita poultry consumption, increasing production of poultry, and opportunities from export are expected to fuel the growth of the market studied during the forecast period.

Expansion of fish farms and government policies to support infrastructure and technology are some of the factors helping in increasing the aqua population and feed production

- Indonesia is one of the largest aquaculture producers in the world, with approximately 2.5 million farmers involved in the industry. The country witnessed a 35% increase in aquaculture feed production since 2017, reaching 1.7 million metric tons in 2022 due to the growth of aquaculture and fisheries and an increase in per capita consumption of aquaculture products. The Indonesian government played a crucial role in expanding the aquaculture sector and drafting robust policies to support infrastructure, entrepreneurship, technology, environmental concerns, and production systems.
- Fish held the largest share of the various aquaculture feeds, accounting for 85.2% in 2022 due to the increasing awareness of the benefits of fish in the human diet, high demand in the international market, the expansion of the retail sector, and the presence of numerous fish farms throughout the country. Most fish farms are located in Central Java.
- Shrimp accounted for 7.0% of the aquaculture feed market in 2022, as it is the second most consumed aquatic animal due to the rise in demand for seafood and its high protein content. The profit margin for shrimp is higher than other commodities, such as catfish, at 15%. To increase productivity and performance, shrimp farmers are focusing on health and nutrition management practices.

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- Factors such as the growing awareness about the benefits of compound feed consumption, government policies, increasing demand for fish and seafood, and rising feed production of aquaculture are expected to drive the growth of the feed additives market during the forecast period.

Indonesia Feed Additives Industry Overview

The Indonesia Feed Additives Market is fragmented, with the top five companies occupying 33.01%. The major players in this market are Archer Daniel Midland Co., BASF SE, Cargill Inc., DSM Nutritional Products 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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