

Medicated Feed Additives - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Medicated Feed Additives Market size is estimated at USD 12.47 billion in 2024, and is expected to reach USD 16.29 billion by 2029, growing at a CAGR of 5.5% during the forecast period (2024-2029).

The market was negatively impacted by COVID-19 in 2020. The global pandemic has shown an impact on the proper functioning of various industries in various regions. It affected customs clearances, export permits, import permits, and phytosanitary certificates. This was primarily due to reduced staffing of government offices, which delayed the consignments meant for trade and reduced the availability of several medicated feed additive products to the farmers. Suppressed demand from the food joints and increased transaction costs is expected to have a knock-on effect that will push the cost of the medicated feed additives production up across the world during the forecast period.

Over the medium term, increasing incidences of zoonotic and foodborne diseases, which have high chances of being naturally transmitted from animals to humans, led to the rising usage of the key feed additives that can minimize the occurrence of such diseases in farm animals. Medicated feed additives improve the quality and nutritional content of the feed. These additives help in the growth and development of animals and increase feed intake. An increase in the awareness of high-quality meat, which is rich in nutrients, has resulted in an increase in the usage of medicated feed additives.

The increases in health awareness in Asia-Pacific led to a surge in demand for plant and animal proteins. However, the recent epidemic outbreaks have made meat quality a critical issue, especially in regions like Europe and North America. The increase in applications of animal protein in the region exerted massive pressure on livestock farmers, who are gradually shifting to various scientific methods of farming.

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Medicated Feed Additives Market Trends

Ban on Antibiotics Leading to Growth in Other Segments

The usage of antibiotics in the food system is causing increasing concerns among the regulatory bodies in many countries. As early as 2006, the European Union banned the usage of antibiotics in animal feed. Since 2017, the United States Food & Drug Administration has banned the use of antibiotics as animal feed supplements. With many countries and regions expected to follow suit, the focus has shifted to other additives that can help reduce the usage of antibiotics for livestock farming. Recently, in 2019, the Indian government banned the use of a 'last hope' antibiotic on farms to try to halt the spread of some of the world's most deadly superbugs after a Bureau investigation revealed it was being widely used to fatten livestock. Other antibiotic colistin was banned due to its unwanted use in the poultry industry. These bans are expected to increase the uptake of antibiotic alternatives, such as probiotics, organic acids, essential oils, prebiotics, immune support, epithelial support, and an energy source for improving meat quality and production. The increasingly stringent regulatory framework related to antibiotics and the increased efficacy of probiotics as a substitute is expected to be the major factors leading to the robust growth of the probiotics segment of the medicated feed additives market.

Asia-Pacific Leads the Global Market

Feed production in Asia-Pacific suffered a minor setback in 2019, on account of the spread of the African Swine Fever, especially in China and Southeast Asian countries. However, the region remains the largest geographical segment in the medicated feed additives market. In 2018, the Chinese government launched a pilot program aiming at the elimination of antibiotics used in livestock feed by 2020. The implementation of this policy has been creating an impact on the feed industry in the country. Upgradation of feed formulations, such as raw material composition, for meeting the needs of animals at different growth stages, and feed production management, such as the need to upgrade the feed processing technology and drive the formulation change, are the crucial factors expected to affect the feed manufacturers in the country. Furthermore, the ban on antibiotic use as growth promoters, cost-effectiveness, and increased awareness about harmful residual effects has resulted in herbal feed additives gaining importance in sustainable livestock production. The animal husbandry sector gets benefits from several feed additives such as ascorbic acid, prebiotic, probiotic, and herbal extracts.

Medicated Feed Additives Industry Overview

The medicated feed market is consolidated, with the top global and regional players occupying major market shares. The focus on quality through extensive investments in R&D was the most adopted strategy of the leading global players in the market. Major investments are directed toward product line expansions and innovations for creating new products to retain the existing customer base. The major players in the market are Cargill Inc., Phibro Animal Health Corporation, Zoetis Inc., Bluestar Adisseo Co. Ltd, Archer Daniels Midland Company, Alltech Inc., and Kemin Industries, among others. For instance, in 2021, Cargill launched its Poultry feed with essential oils under improved Nutrena Naturewise formulas. The natural essential oils help in the promotion of egg weight, size, and production, enhanced palatability, and a fresh aroma direct from the bag.

Additional Benefits:

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

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