

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

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### **Report description:**

The Middle East Feed Additives Market size is estimated at USD 0.89 billion in 2024, and is expected to reach USD 1.04 billion by 2029, growing at a CAGR of 3.16% during the forecast period (2024-2029).

- In 2022, the Middle Eastern feed additives market accounted for USD 832.9 million, an increase of 2.7% from the previous year. A slight dip was observed during 2019-2020, mainly due to the COVID-19 impact, when the global trade and local supply chains were largely disrupted. Hence, feed production was reduced in these years.
- Among feed additives, amino acids are largely used in animal feeds. In 2022, they accounted for a market value of USD 170.2 million. Amino acids were largely consumed by poultry birds, accounting for 58% of the amino acids segment in the region. Amino acids synthesize proteins, and lysine and methionine are the most crucial amino acids for animals' growth and health maintenance. Thus, these factors are expected to increase the sales of feed amino acids in the region. ?
- In 2022, feed binders were the second-largest feed additives consumed in the region, accounting for USD 105.3 million market value. They are used to strengthen pellets, improve pellet's integrity, durability, and stability, reduce nutrient leaching, and prevent fragmentation of pellets during handling, transportation, and storage.?
- Probiotics, minerals, prebiotics, acidifiers, and mycotoxin detoxifiers are the major feed additives widely used in the region, and they accounted for USD 81.5 million, USD 78.6 million, USD 71.4 million, USD 61.4 million, and USD 53.9 million market value in 2022. These feed additives primarily help improve growth performance and easy absorption of nutrients and maintain the animals' gut health.
- With the rising demand for domestic consumption of meat and livestock products and the nutritional benefits associated with

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additives consumption, the feed additives market in the region is anticipated to record a CAGR of 3.2% during 2023-2029.?

- The Middle East region held a small share of the global feed additive market, accounting for only 2.5% of the market value in 2022, which amounted to USD 832.9 million. However, due to the rising demand for meat and meat products, the region is expected to witness a significant increase of 24.5% in market value by 2029. This increase is primarily attributed to the growing production of animals in the region.
- Among the Middle Eastern countries, Saudi Arabia was the largest market for feed additives, contributing to 39.1% of the total market value in 2022. This can be attributed to the country's higher feed production and greater usage of feed additives. Meanwhile, Iran is the fastest-growing country in the region, with a CAGR of 3.6%, driven by the increasing meat production, which grew by 44% in 2021 compared to the previous year.
- In terms of animal types, poultry birds dominate the feed additive market, accounting for 55.5% of the total market value in 2022. This can be attributed to the growing demand for poultry meat and the effectiveness of feed additives in promoting the growth of these animals. Ruminants followed poultry birds, representing 41.6% of the market share in 2022. However, broilers, dairy cattle, and layers were the most prominent animals in the region, occupying 37%, 23%, and 16% of the market share, respectively. The usage of feed additives increases the meat content of these animals, which is the primary driving factor for the use of additives in these animals.
- The feed additives market in the region is expected to record a CAGR of 3.2% during the forecast period, driven by the growing demand for meat and meat products and an increase in investments in animal production.

#### Middle East Feed Additives Market Trends

Expanding poultry sector in the Middle East region with establishment of new farms with increasing per capita consumption of poultry has been increasing the demand for poultry production

- In the Middle East, the poultry industry is the largest segment in the agricultural sector, and it represented 90% of the animal headcount in the region in 2022. The industry experienced significant growth, with production increasing by 10.9% in 2022 compared to 2017. The rise in demand for meat and egg products in the region was the primary driver of this growth. The demand from tourism, business travel, and the hotels, restaurants, and institutional (HRI) sector also contributed to a 2.5% increase in poultry production in 2022 compared to the previous year. This increased production also led to a 2.9% rise in the value of feed additives used in poultry production.
- Middle Eastern countries are investing in their poultry sectors to expand production to meet the growing demand. For example, Saudi Arabia's Almarai company is investing USD 1.12 billion to establish a factory and new farms to increase poultry production. In 2022, the Saudi Arabian Ministry of Environment, Water, and Agriculture issued 275 poultry project licenses, including 119 for broiler projects, 26 for egg production with a capacity of more than two billion eggs per year, and 12 for breeding and producing broiler mothers and operating hatcheries with a capacity of 480.5 million chicks per year.
- The per capita consumption of poultry products in the region also increased, from 44.9 kg in 2017 to 45.5 kg in 2022, further driving the demand for increased production. As a result, factors such as increasing investment in the poultry industry and growing demand for poultry products are expected to continue to fuel the growth of poultry animal production during the forecast period.

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Government in the countries such as Saudi Arabia, Oman and the United Arab Emirates invested to establish large fish farms which will increase the demand for aqua feed in the region

- The Middle Eastern aquaculture industry has experienced significant growth over recent years, leading to a rise in demand for aquaculture feed. Between 2017 and 2022, demand for aquaculture feed increased by 25.1%. This growth was due to the expansion of the aquaculture industry in the region, which led to increased production of aquaculture species. In 2022, aquaculture feed production accounted for 2.1% of the total feed production in the region, totaling 0.5 million metric tons.
- Iran is the largest producer of aquaculture feed in the region, and it had a production of 0.28 million metric tons in 2022. This high production was attributed to the country's strong aquaculture production, which benefits from the availability of freshwater resources for cultivating different types of aquaculture species.
- Fish are the largest aquaculture species produced in the region, accounting for 78.6% of aquaculture feed production. Countries such as Saudi Arabia, Oman, and the United Arab Emirates have invested in aquaculture and partnered with international experts and organizations to establish productive local fish farms. For example, aquaculture organizations in the Gulf region are working with the UK Government's Centre for Environment Fisheries and Aquaculture Science (Cefas) through the UK Gulf Marine Environment Partnership (GMEP) Programme to improve fish farming and tackle biodiversity loss.
- Oman and the United Arab Emirates have the highest per capita consumption of aquaculture species in the region, with consumption reaching 28.6 kg per person per year. To reduce exports and increase domestic production, the Omani government aims to transform the fisheries and aquaculture sector from a subsidy sector to a significant contributor to the country's economy.

#### Middle East Feed Additives Industry Overview

The Middle East Feed Additives Market is fragmented, with the top five companies occupying 27.41%. The major players in this market are Adisseo, Alltech, Inc., Archer Daniel Midland Co., Cargill Inc. and DSM Nutritional Products AG (sorted alphabetically).

#### Additional Benefits:

- The market estimate (ME) sheet in Excel format
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