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

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Report description:

The North America Feed Additives Market size is estimated at USD 9.54 billion in 2024, and is expected to reach USD 12.54 billion by 2029, growing at a CAGR of 5.62% during the forecast period (2024-2029).

- Supplementation of feed additives in the animal diet improves the quality and digestibility of feed and improves animal performance. Hence, the feed additives market in the North American region is expected to register a CAGR of 5.6% during the forecast period.
- The market value of feed additives in the region increased in 2019 by 16% compared to 2018 because of the increase in the market value of every additive type, as feed production for ruminants increased in 2019 in the region.
- In 2022, amino acids, binders, minerals, probiotics, and prebiotics were the major feed additive types used in livestock feed in North America, which together accounted for 62.5% of the region's total feed additives market by value.?
- In North America, lysine and methionine were the most significant feed amino acids with respect to the market value, which together accounted for 73% of the North American feed amino acids market by value in 2022. The higher share of lysine and methionine was due to their increased efficiencies and benefits with improved gut health and easy digestion in animals.
- Among binders, synthetic binders held the largest share in 2022, amounting to 65.6% of the regional binders market. The use of synthetic binders is driven by their ability to improve the quality of feed by increasing pellet durability.
- During the forecast period, flavors and sweeteners are expected to be the fastest-growing feed additive types in the North American feed additives market, recording a CAGR of 5.6%. They are used to neutralize the bitter taste of vitamins, minerals, and other feed additives to increase the feed intake by the animals.

- Thus, based on the abovementioned factors and the importance of feed additives in animal nutrition, the demand for feed additives is anticipated to grow in the region during the forecast period.

- The North American feed additive market is growing rapidly, making it the fastest-growing region globally. It is projected to maintain a CAGR of 5.6% during the forecast period, growing from a value of USD 8.58 billion in 2022 to USD 12.5 billion in 2029. The rapid expansion is attributed to a 30.2% increase in feed production over the historical period from 2017 to 2022.
- Feed amino acids are the dominant additives in the North American region, with a market value of USD 1.7 billion in 2022. This high share is due to their ability to improve efficiency. However, acidifiers are expected to grow at the fastest rate, recording a CAGR of 6.7% during the forecast period. This is due to restrictions on antibiotics usage in the region.?
- Among all animal types, ruminants were the most significant users of feed additives in 2022, with a market value of USD 3.0 billion, representing 35.6% of the North American feed additives market. The growth in beef consumption in the commercial food industry has increased the usage of additives in this segment. The swine and poultry segments are the region's second and third fastest-growing feed additive usage segments, with CAGRs of 5.6% and 5.3%, respectively, during the forecast period. This growth is attributed to the increase in the number of poultry and swine heads, driven by rising consumption.?
- The United States has the largest feed additives market in North America, accounting for 69.7% of the regional feed additives market in 2022. Amino acids, binders, minerals, probiotics, and prebiotics were the major feed additive types used in animal feed in the United States, collectively accounting for 62.7% of the US feed additives market.?

North America Feed Additives Market Trends

Higher consumption of poultry meat than red meat and the United States is globally largest producer of eggs and poultry meat is driving the demand for poultry production

- The North American poultry industry experienced significant growth in the last five years, with the poultry headcount increasing by 5.0% from 2017 to 2022. This growth is due to the increasing demand for poultry meat and other poultry products. The United States dominated the region's poultry industry and was the world's largest producer and second-largest exporter of poultry meat and a major egg producer in 2022. The United States accounted for 62.0% of the region's poultry production in 2022. The high-profit margins in the industry are attracting new poultry producers, leading to an increase in the number of producers. For instance, the number of egg producers in Canada increased from 1,062 in 2016 to 1,205 in 2021.
- Poultry birds, especially broiler meat, are produced in large quantities due to their quick maturity and market weight, which is faster than other livestock. Poultry birds, including broilers, can be raised in small spaces, making it possible for producers to raise poultry in small plots of land. These advantages make poultry production more feasible. As a result, Mexican poultry production increased by 12% in 2022 from the previous year.
- Poultry has become one of the most consumed livestock commodities in the region. Poultry meat consumption is significantly higher than beef or pork but less than total red meat consumption. More people are choosing poultry as a leaner, healthier source of protein due to the rising health risks linked to eating red meat. This trend is expected to continue, driving the growth of the poultry industry in the region. The increasing demand for poultry products from both domestic and international markets and rising poultry production are expected to further drive the market's growth during the forecast period.

Expansion of retail industry and demand for high-quality seafood is increasing the demand for macro-nutrients and micro-nutrients rich aquaculture feed

- Aquaculture feed production in the North American region accounted for a small share, accounted for 3.8% in 2022. However, the demand for various seafood products is driving local production, and feed production grew by 9.2% between 2017 and 2022. To the meet growing demand for nutritionally balanced feed, feed millers in the region are expected to increase production from 2.2 million metric tons in 2022 to 2.6 million metric tons in 2029. The compound feed offered to aquaculture species contains the macro- and micronutrients needed for healthy growth under intensive rearing conditions, which is contributing to the increased demand for aquaculture feed in the region.
- Fish accounted for 73.2% of feed production in 2022, and is a major segment among aquaculture species. The rising awareness of the health benefits of fish in the human diet, changing food consumption patterns, the expansion of the retail industry, and high demand in the international market are contributing to the growth of fish production in the region. Fish feed production is expected to increase from 1.6 million metric tons in 2022 to 1.9 million metric tons in 2029 as producers focus on nutritional management to ensure the health and performance of their animals.
- Canada's aquaculture producers spent USD 393.8 million on feed in 2020, recording a 6.6% increase over 2016, demonstrating the increasing demand for high-quality aquatic food. The inability of wild stocks to meet this demand provides an opportunity for aquaculture production, contributing to the growth in feed production. The increasing demand for diverse seafood products and the need for nutritionally balanced feed for aquaculture species are expected to drive the growth of aquaculture feed production in the region over the coming years.

North America Feed Additives Industry Overview

The North America Feed Additives Market is fragmented, with the top five companies occupying 31.97%. The major players in this market are Adisseo, Archer Daniel Midland Co., DSM Nutritional Products AG, Evonik Industries 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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