

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

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Report description:

The North America Feed Amino Acids Market size is estimated at USD 1.97 billion in 2024, and is expected to reach USD 2.60 billion by 2029, growing at a CAGR of 5.71% during the forecast period (2024-2029).

- The feed amino acids market in the region saw a substantial increase in 2019, with a growth rate of 15.4% compared to the prior year. This growth is attributed to the rise in feed production, specifically for ruminants, with every type of amino acid used in feed experiencing an increase in value.
- In North America, lysine and methionine were the most commonly used feed amino acid sub-additives in 2022, owing to their essential role in animal gut health and digestion. Tryptophan and methionine are anticipated to exhibit the highest growth rates during the forecast period, with a projected CAGR of 6.3%. While tryptophan is costlier than other amino acids and therefore constitutes a smaller share of the market, it plays a crucial role in promoting growth and increasing feed intake during the pre-weaning stage of an animal's life cycle.
- The United States is the largest country in the feed amino acids market, with lysine and methionine accounting for nearly 70% of the market in 2022. The country's growth rate in this market is the highest in North America, partly due to the affordability and moderate dosage rate of lysine.
- Despite varying costs, all feed amino acid types are projected to grow at similar rates in the forecast period throughout the region, given their ability to provide various benefits for animals, including promoting gut health, muscle development, and egg formation. These benefits extend to a range of animal types and serve diverse purposes. The market is expected to grow due to these benefits, driving the demand for feed amino acids.

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- In 2022, the North American feed amino acids market accounted for 21% of the total feed additives market, with a value of USD 1.8 billion. This is due to the increasing demand for meat and meat products, leading to the rise in the usage of amino acids in the animal feed industry. The market value increased by 15.4% in 2019 compared to 2018, driven by the increase in feed production in the region, particularly in the United States.
- Poultry animals were the most significant users of feed amino acids in 2022, with a market value of USD 0.7 billion, representing 41.7% of the North American feed amino acid market. Ruminants followed with a market share of 35.1% in the same year. The consumption of poultry meat in households and the commercial food industry has increased the usage of amino acids, with broilers accounting for over 70% of the total feed amino acid usage in poultry animals.
- Lysine and methionine were the most commonly used amino acids in 2022, accounting for 43.2% and 29.8% of the total amino acid market in the region, respectively. These amino acids are essential for animal growth and development since animal tissues cannot synthesize them or cannot make the adequate amount needed.
- The United States is the largest feed amino acid market in North America, accounting for 70% of the total feed amino acid market in 2022. The country was also the fastest-growing in terms of the feed amino acids market, with a CAGR of 6.2% during the forecast period. The demand for meat and meat products, along with the increasing demand for feed that enhances growth, development, and resistance to diseases, is expected to drive the North American feed amino acids market at a CAGR of 5.6% during the forecast period.

North America Feed Amino Acids 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 over the last five years, with the poultry headcount increasing by 5.0% from 2017 to 2022. This growth is largely due to the increasing demand for poultry meat and other poultry products. The United States dominates the North American poultry industry as the world's largest producer and second-largest exporter of poultry meat, as well as a major egg producer. The United States accounted for 62.0% of the region's total poultry production in 2022. The high-profit margin in the industry is attracting new poultry producers, leading to an increase in the number of producers in the region. For example, 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. Furthermore, poultry birds, including broilers, can be raised in small spaces, making it possible for producers to raise poultry in a variety of environments, including small plots of land. These advantages make poultry production more feasible, and as a result, Mexican poultry production increased by 12% in 2022 from the previous year.
- Poultry meat consumption is significantly higher than that of beef or pork. 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 growth of the market during the forecast period.

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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 accounts for a small fraction of the global production, representing only 3.8% in 2022. However, the demand for diverse seafood products is driving local production, and feed production grew by 9.2% between 2017 and 2022. In response to the increasing 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, contributing to the increased demand for aquaculture feed in the region.
- Fish, which accounted for 73.2% of feed production in 2022, is the most prominent species in feed production. The rising awareness of the health benefits of fish in the human diet, changing food consumption patterns, the expansion of the retail sector, 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, a 6.6% increase from 2016, demonstrating the increasing demand for high-quality aquatic food. Overall, 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 North American region in the coming years.

North America Feed Amino Acids Industry Overview

The North America Feed Amino Acids Market is moderately consolidated, with the top five companies occupying 55.19%. The major players in this market are Archer Daniel Midland Co., Evonik Industries AG, IFF(Danisco Animal Nutrition), Land O'Lakes and SHV (NutraCo NV) (sorted alphabetically).

Additional Benefits:

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

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