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

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Report description:

The North America Feed Enzymes Market size is estimated at USD 361.30 million in 2024, and is expected to reach USD 481.60 million by 2029, growing at a CAGR of 5.92% during the forecast period (2024-2029).

- The feed enzymes market in North America is gaining importance due to the enzymes' ability to increase the intake of energy and nutrients in animals from feeds. Carbohydrase enzymes are a significant driver of market growth because of their ability to increase protein, mineral, and lipid intake in animals. In 2022, the feed enzymes market accounted for only 3.8% of the feed additives market in North America; in 2019, it witnessed an increase in value by 15.5% due to the rise in feed production and demand.
- The United States was the largest country in the North American feed enzymes market, accounting for 70% of the market share in 2022, owing to the country's high feed production and demand for meat and dairy products. Poultry birds comprised the largest segment by animal type, accounting for 42% of the feed carbohydrases market in 2022. The increased usage of feed carbohydrases in poultry birds is due to the fact that carbohydrases help in the digestion of non-soluble polysaccharides.
- The United States is expected to be the fastest-growing country in the feed enzymes market, registering a CAGR of 6.3% during the forecast period. This growth is expected to be driven by the increase in awareness of the benefits of feed additives and the growing demand for meat and livestock.
- While the feed enzymes market accounts for a relatively small percentage of the feed additives market, its importance is growing in North America. Carbohydrase enzymes, in particular, are driving market growth due to their ability to increase the intake of key nutrients in animals. With the increase in demand for meat and livestock, the feed enzymes market is expected to

continue to expand in the region.

- The North American feed enzymes market is rapidly expanding, with a value of USD 0.3 billion in 2022, accounting for 3.7% of the total feed additives market. The increasing demand for meat and meat products is driving the growth of enzymes in the animal feed industry. In 2019, the market value rose by 15.5% compared to 2018 due to increased feed production, especially in the United States.
- Among all animal types, ruminants are the most significant users of feed enzymes, with a market value of USD 0.1 billion, representing 33.7% of North America's total feed enzymes market in 2022. The increased consumption of beef in households and the commercial food industry led to an increased usage of enzymes for improving animal growth. More than 62.2% of the total feed enzymes used in ruminants in 2022 were utilized for beef cattle.
- The United States is North America's largest feed enzymes market, with a share of 68.9% in 2022. The country also has the fastest-growing feed enzymes market, expected to record a CAGR of 6.3% during the forecast period.
- Carbohydrases are the most commonly used enzyme type in North America, accounting for 47.1% in 2022. They help reduce animal feed costs by increasing the energy or starch intake from cereal feed. Adding enzymes to the animal diet can boost performance and health, as enzymes help digestion and nutrient intake. Animal feed enzymes help break down fiber and phytate naturally present in various feed ingredients. Therefore, the demand for enzyme feed is expected to record a CAGR of 5.9% during the forecast period.

North America Feed Enzymes 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 has experienced significant growth over the last five years, with the poultry headcount increasing by 5.0% from 2017 to 2022, owing to the increased demand for poultry meat and other poultry products. The United States dominates the North American poultry industry; it is 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 attracts new poultry producers, leading to an increase in the number of producers. 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 a variety of environments, including small plots of land. These advantages make poultry production more feasible. 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 increasing awareness about the health risks associated with 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 drive the growth of the market 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 accounts for a small fraction of the global production, with 3.8% in 2022. However, the demand for diverse seafood products is driving local production. Feed production increased 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 increasing demand for aquaculture feed in the region.
- Fish, which accounted for 73.2% of feed production in 2022, is the most prominent species in terms of 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 increased demand for high-quality aquatic food. 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 North America in the coming years.

North America Feed Enzymes Industry Overview

The North America Feed Enzymes Market is moderately consolidated, with the top five companies occupying 56.17%. The major players in this market are Archer Daniel Midland Co., Brenntag SE, DSM Nutritional Products AG, Elanco Animal Health Inc. and IFF(Danisco Animal Nutrition) (sorted alphabetically).

Additional Benefits:

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

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