

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

Market Report | 2024-02-17 | 203 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The South America Feed Amino Acids Market size is estimated at USD 0.89 billion in 2024, and is expected to reach USD 1.14 billion by 2029, growing at a CAGR of 5.08% during the forecast period (2024-2029).

- In 2022, South America's feed amino acids market accounted for 20.5% of the total feed additives market in the region. Lysine was the most crucial for animal nutrition among all amino acids, accounting for 38.3% of the South American feed amino acids market in terms of value. Lysine is essential for animal growth and maintenance, making it an integral part of the ideal protein diet.
- Poultry was the primary animal type in the South American feed amino acid market in 2022, accounting for 52.5% of the market share value. The increase in poultry headcount by 10.1% between 2017 and 2022 was a contributing factor to this high market share.
- Brazil held a major share of the South American methionine market in 2022, accounting for around 48.2% of the market share in terms of value. The country's high cattle and poultry population led to the highest consumption of methionine in Brazil. In 2021, the headcount of poultry and ruminants accounted for 1,564.9 million and 258.6 million, respectively.
- Threonine was the third-largest segment in the South American feed amino acids market, accounting for a market value of USD 117.5 million in 2022. The rising demand for amino acid feed, along with the increase in feed costs, is expected to support the overall market growth.
- The dairy cattle segment is expected to be the fastest-growing segment in the South American methionine market during the forecast period, registering a CAGR of 5.6%. Methionine plays a critical role in increasing the protein and fat content and growth of

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

cattle, leading to high demand.

- Due to the importance of feed amino acids in animal nutrition and the increased animal population in the region, the South American feed amino acids market is anticipated to grow, registering a CAGR of 5.0% during the forecast period.

- In 2022, Brazil cemented its position as the largest feed amino acid market in South America, holding around a 49.0% share of the regional market. This growth trajectory saw an impressive 28.1% increase between 2017 and 2022, primarily propelled by the country's burgeoning meat and dairy industry. Meanwhile, Argentina is the second-largest market, currently valued at USD 141.1 million in 2022, with a projected CAGR of 4.9% to reach USD 197.0 million in 2029. This anticipated growth is largely attributed to a 15.2% increase in feed production between 2017 and 2022.

- Lysine accounted for the most consumed amino acid in the country, boasting a 38.3% market share value, followed closely by methionine with 30.6%. The popularity of these amino acids can be attributed to their ability to facilitate protein synthesis and subsequent meat production while balancing gut acids. Poultry feed production was the dominant sector, with a total output of 42.8 million metric tons in 2022, experiencing a significant 14.2% increase between 2017 and 2022. Ruminants were the second-largest animal type in feed production, accounting for 12.4 million metric tons in 2022. As feed production rises, the demand for feed amino acids in the country also increases.

- The beef cattle segment is projected to be the fastest-growing sector in the feed amino acid market, with an impressive CAGR of 5.0%. This surge can be attributed to the high feed intake of beef cattle and an overall 6.1% increase in ruminant headcount, including beef cattle, between 2017 and 2022. Based on these contributing factors, the feed amino acid market is poised for continued growth during the forecast period.

South America Feed Amino Acids Market Trends

Broilers and layers dominate the poultry production as the poultry farming gained popularity due to high Return on Investment (ROI) and increased demand for poultry products

- Poultry farming is a vital industry in South America. The region's poultry sector experienced an impressive growth rate of 10.1% in 2022 compared to 2017. This growth can be attributed to the increased consumption of poultry meat and its products, both domestically and internationally. In 2022, the consumption of poultry meat in Brazil alone was around 10.3 million metric tons, which was a significant increase from 9.6 million metric tons in 2018. This trend is set to continue as the poultry sector continues to grow and industrialize across many parts of South America.

- The production of broilers and layers is a major contributor to the region's poultry segment, accounting for around 97.3% of the total poultry production in 2022. Brazil is the largest producer of poultry products in South America, with a production of around 14.6 million metric tons of chicken meat in 2021. The region is also a major poultry exporter globally, with Brazil exporting over 70% of the region's poultry meat exports. In 2021, Brazil exported about one-third of its chicken production to over 150 countries, with China being the largest destination export hub for the region.

- Poultry farming has been gaining importance in the region, particularly in Brazil, due to its high yield and quick return on investment. As a result, the poultry farming industry in South America, particularly in Brazil, is experiencing steady growth due to increasing demand for poultry meat and its products, both domestically and internationally. With an increasing focus on industrialization and the many benefits it offers, the poultry farming sector in the region is poised for continued growth in the coming years.?

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Freshwater cultivation account for 90% of aqua production and expansion of aquaculture industry is contributing to increasing aqua feed production

- The aquaculture feed production in South America has been rapidly increasing since 2017, with a 57.5% rise in 2022, producing about 5 million metric tons of compound feed for aquatic species. Brazil and Chile have been the major contributors to the growth in feed production for aquaculture, with both countries accounting for 1.4 and 1.2 million metric tons, respectively, in 2022. This growth is primarily attributed to the rise in freshwater cultivation of aquaculture species in these countries, with freshwater cultivation accounting for 90% of the aquaculture production in Brazil on average after 2020.
- Fish feed production in South America has been on the rise, and it accounted for 80.4% of the total aquaculture feed production in 2022. This increase in fish feed production can be attributed to the rising fish farming in countries like Brazil and Chile, with a 56% increase in production compared to 2017. This trend is expected to continue in the next few years as the potential for the expansion of the fisheries and aquaculture sector in the region is enormous.?
- Tilapia farming is one of the major contributors to the expansion of the aquaculture industry in the region, leading to increased demand for compound feed.? Shrimp feed production has also witnessed a significant increase of 51.4% in 2022 compared to 2019, driven by the rising demand for high-profit-margin white-leg shrimp species. This trend is expected to continue in the next few years, driven by increasing shrimp production and export demand.
- The aquaculture feed production in South America is projected to continue to increase in the next few years, driven by the expansion of the fisheries and aquaculture sector, rising demand for high-quality protein, and increasing export demand.

South America Feed Amino Acids Industry Overview

The South America Feed Amino Acids Market is fragmented, with the top five companies occupying 33.43%. The major players in this market are Adisseo, Evonik Industries AG, IFF(Danisco Animal Nutrition), Lonza Group Ltd. and SHV (Nutreco NV) (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

- 3.1 Study Assumptions & Market Definition
- 3.2 Scope of the Study?
- 3.3 Research Methodology

4 KEY INDUSTRY TRENDS

- 4.1 Animal Headcount
 - 4.1.1 Poultry

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.1.2 Ruminants
- 4.1.3 Swine
- 4.2 Feed Production
 - 4.2.1 Aquaculture
 - 4.2.2 Poultry
 - 4.2.3 Ruminants
 - 4.2.4 Swine
- 4.3 Regulatory Framework
 - 4.3.1 Argentina
- 4.4 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2029 and analysis of growth prospects)

- 5.1 Sub Additive
 - 5.1.1 Lysine
 - 5.1.2 Methionine
 - 5.1.3 Threonine
 - 5.1.4 Tryptophan
 - 5.1.5 Other Amino Acids
- 5.2 Animal
 - 5.2.1 Aquaculture
 - 5.2.1.1 By Sub Animal
 - 5.2.1.1.1 Fish
 - 5.2.1.1.2 Shrimp
 - 5.2.1.1.3 Other Aquaculture Species
 - 5.2.2 Poultry
 - 5.2.2.1 By Sub Animal
 - 5.2.2.1.1 Broiler
 - 5.2.2.1.2 Layer
 - 5.2.2.1.3 Other Poultry Birds
 - 5.2.3 Ruminants
 - 5.2.3.1 By Sub Animal
 - 5.2.3.1.1 Beef Cattle
 - 5.2.3.1.2 Dairy Cattle
 - 5.2.3.1.3 Other Ruminants
 - 5.2.4 Swine
 - 5.2.5 Other Animals
- 5.3 Country
 - 5.3.1 Argentina
 - 5.3.2 Brazil
 - 5.3.3 Chile
 - 5.3.4 Rest of South America

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).

6.4.1 Adisseo

6.4.2 Ajinomoto Co., Inc.

6.4.3 Alltech, Inc.

6.4.4 Archer Daniel Midland Co.

6.4.5 Evonik Industries AG

6.4.6 IFF(Danisco Animal Nutrition)

6.4.7 Kemin Industries

6.4.8 Lonza Group Ltd.

6.4.9 Novus International, Inc.

6.4.10 SHV (NutraCo NV)

7 KEY STRATEGIC QUESTIONS FOR FEED ADDITIVE CEOS

8 APPENDIX

8.1 Global Overview

8.1.1 Overview

8.1.2 Porter's Five Forces Framework

8.1.3 Global Value Chain Analysis

8.1.4 Global Market Size and DROs

8.2 Sources & References

8.3 List of Tables & Figures

8.4 Primary Insights

8.5 Data Pack

8.6 Glossary of Terms

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Market Report | 2024-02-17 | 203 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-05-05
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com