

**Feed Additives Market Assessment, By Product Type [Technological Additives, Nutritional Additives, Sensory Additives, Zootechnical Additives, Coccidiostats and Histomonostats], By Livestock [Ruminants, Poultry, Aquatic Animals, Swine, Others], By Source [Synthetic, Natural], By Form [Dry, Liquid], By End-user [Residential, Commercial], By Region, Opportunities and Forecast, 2017-2031F**

Market Report | 2024-08-23 | 221 pages | Market Xcel - Markets and Data

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**Report description:**

Global feed additives market is projected to witness a CAGR of 5.44% during the forecast period 2024-2031, growing from USD 54.44 billion in 2023 to USD 83.17 billion in 2031. The market is a key part of the farming industry which aims to improve the quality and effectiveness of animal feeds. The growth in this market has been significant due to increased demand for meat, milk, and aquaculture products as a result of world population growth and increased urbanization. Vitamins, amino acids, enzymes, probiotics, and minerals are some examples of feed additives that have great significance in the enhancement of the health, development, and productivity of farm animals and in improving their feed digestibility and nutritive value.

There are various reasons for the market's growth including changes in animal raising methods, people becoming increasingly aware of the importance of supplementations and strict rules that promote food safety and quality control. The industry thrives the most in Asia-Pacific, with countries such as China and India which have expansive livestock industries. The other regions that account for considerable portions of the global market are North America and Europe as they consume large quantities of meat besides having diverse legal systems.

Rising costs of raw materials and dynamic customer demands and ever-evolving regulatory requirements are the major challenges faced by industry. However, the global feed additives market is poised for growth, driven by advancements in technology along with an increasing emphasis on sustainable and efficient forms of livestock production.

In June 2023, Evonik Industries AG introduced a new generation of Biolylys, a proven lysine source for animal feed. From 60 percent L-lysine (a 77 percent ratio to Lysine HCl) in the existing version to 62.4 percent L-lysine (an 80 percent ratio) is present in the

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new Biolys formulation. Due to the fermentation process, the product contains essential components that aid livestock such as pigs and poultry by providing extra energy and minerals.

#### Sustainability Trend Fuels Market Growth

The sustainability trend is largely driving the global feed additives market's development. At a time when environmental crises are mounting, and sustainable agriculture is being advocated for, more importance is attached to more eco-friendly as well as highly productive practices of farming. Feed additives facilitate this transition by raising the feed conversion ratio, cutting down on livestock farming's negative effects on environment and fostering better animal health without necessarily using antibiotics. In May 2024, Archer Daniels Midland Company conducted a thorough life cycle assessment for its plant extract-based feed additive, XTRACT 6930. The use of XTRACT 6930 has been shown to reduce the carbon footprint of raising live broilers by at least 1.9% and the carbon footprint of producing broiler meat by at least 2.8%. Furthermore, XTRACT 6930 has demonstrated a negligible impact on broiler feed's environmental footprint.

Furthermore, governments take a keen interest in implementing sustainable practices through policy frameworks that foster environmentally sound behavior. They support research and development in the field of green technologies, offering subsidies and/or tax incentives to encourage sustainable agriculture practices and innovations. In fact, in June 2024, Denmark became the first nation in the world to impose a tax on agriculture, having announced a historic carbon tax on agricultural emissions. A tax of USD 43 per ton of carbon dioxide equivalent will be imposed on Danish livestock farmers starting in 2030. By 2030, it is hoped to have cut Denmark's greenhouse gas emissions by 70% from 1990 levels. By 2035, the tax will rise to USD 108.

#### Innovation Propels the Feed Additives Market Growth

Innovation is one of the major forces behind the rise of the global feed additives market. Advances in biotechnology and nutritional science are leading to the development of highly efficient and targeted feed additives that enhance animal health, growth, and productivity. Breakthroughs in enzyme-based additives improve absorption of nutrients and feed conversion ratios. Other types such as probiotics and prebiotics enhance gut health and immunity, thereby reducing reliance on antibiotics or medications.

Furthermore, precision nutrition methods have enabled the development of personalized diets for distinct animals, enhancing efficiency while reducing waste. Furthermore, there has been a rise in eco-friendly agricultural practices such as natural growth promoters and organic minerals, which could be classified as novel sustainable additives.

These technological advancements improve the efficiency of livestock farming and allow producers to comply with stringent regulations and meet consumers' needs for quality and safety in animal products.

In January 2023, Nutreco N.V. announced a long-term strategic research and commercial agreement with BiomEdit to provide livestock farmers with cutting-edge and genuinely new feed additives created using microbiome technology. These innovative feed additives for aquaculture, poultry, swine, and cattle address the health and sustainability concerns faced by today's animal producers.

#### Swine Feed Industry Consumes Large Amounts

Swine feed sector is one of the biggest users of feed supplements due to significant demand for pork globally. Additives are important in swine nutrition to promote growth rates, increase feed efficiency, and ensure general health. Significant additive types include amino acids, vitamins, enzymes, and probiotics that enhance nutrient absorption and immunity in pigs.

As pork is a staple food in many parts of the world, especially in Asia-Pacific, the extensive systems under pig-farming operations demand such additives for maximizing production efficiency and meeting the increasing market demands. Moreover, advancing feed additives are embraced more by the swine industry as they help in minimizing production costs while sustaining high levels of meat quality.

In March 2024, DSM-Firmenich AG introduced its new adaptive nutrition approach, broadening its swine portfolio. As a part of this approach, the firm announced its launch of Verax DBS Analytics service to assist swine producers in assessing the vitamin D3 status of their animals and providing tailored recommendations on how to enhance it. Using AI technology and transcriptomics, the company developed a functional solution in the form of MaxiFicient Boost GF, intended to increase efficiency and marketable meat while avoiding problems associated with lameness or immunity.

#### Asia-Pacific Dominates Feed Additives Market

Asia-Pacific primarily dominates the global feed additives market due to the rapid growth of its livestock sector and rising

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requirement for meat and milk products. In this context, countries such as China and India lead due to their high populations and emerging middle-class that eventually leads to increased consumption of animal protein. As a result of this increased demand, feed supplements are required to improve the animals' growth, health, and productivity.

Increasing demand for feed additives has enticed companies aiming to enter the Asia-Pacific market. To take advantage of rapidly growing livestock and aquaculture sections there, they aim at tapping local production capabilities and forming partnerships and modifying their products according to regional requirements. In January 2024, in anticipation of delivering its first product to clients through ADISSEO Group's sales network in China, Calysta, Inc's joint venture with ADISSEO Group, Calysseo, acquired legal clearance to be used in aquaculture feeds in China. Calysta, Inc's single cell protein received formal permission from the Ministry of Agriculture and Rural Affairs (MARA) of China for use in fish and shrimp feeds following a thorough review process.

Moreover, supportive government policies and investments in agriculture further strengthen the feed additives market in Asia-Pacific. Given that it prioritizes sustainable and efficient animal husbandry practices, the region is a leading stakeholder in the global feed additives market.

Future Market Scenario (2024 - 2031F)

□□With the increasing concern about the environment, more attention being directed towards sustainable farming practices is expected. Feed additives that improve feed efficiency, reduce waste and lower greenhouse gas emissions will be in great demand.

□□The increasing use of biotechnology and innovation in nutrition will result in the emergence of more efficient and targeted feed additives. They will comprise precision nutrition solutions to suit the individual needs of various animal types, enhancing their productivity and welfare.

□□The enhancement of animals' health and reproduction by using healthier alternatives to antibiotics could lead to heightened adoption of alternative feed additives in animal husbandry.

Key Players Landscape and Outlook

The landscape of key players in the global feed additives market is dominated by several major companies. Innovation and product advancement are their key objectives, leading to research and development of sustainable and efficient alternatives promoting animal health.

The outlook for these key players is positive, driven by the increasing demand for high-quality animal protein and the need for sustainable farming practices. Strategic mergers, partnerships, and developments of new additives that serve the changing needs of the livestock industry are being used by companies to expand their market share. For instance, in June 2022, Cargill, Incorporated acquired the global plant-based phytogenic additives, Delacon. The acquisition aimed at improving animal health and enhancing livestock and aquaculture performance by combining Cargill's extensive worldwide network and deep expertise in animal nutrition technology with Delacon's knowledge and experience in the market for phytogenic feed additives.

Additionally, advancements in biotechnology and precision nutrition are expected to provide new growth opportunities. The competitive landscape will likely see heightened activity as firms strive to differentiate themselves through innovative solutions that align with regulatory changes and consumer preferences.

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22.4.9. Alltech, Inc

22.4.10. Phibro Animal Health Corporation

\*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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