Japan 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, FY2018-FY2032F

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Report description:

Japan feed additives market is projected to witness a CAGR of 5.12% during the forecast period FY2025-FY2032, growing from USD 0.71 billion in FY2024 to USD 1.06 billion in FY2032. The market is an essential part of the country's agriculture and livestock sectors, compelled by the need to have high-quality animal nutrition. The scarcity of local resources has made Japan to depend on imports for most of its livestock feed which in turn continues to increase the need for feed supplements that can improve the nutrient content of feeds, promoting better health status and enhancing productivity in the forecast years.

The key factors driving the growth of feed additives market are enhanced consumer awareness regarding food safety, increased consumption of meat and dairy products, and the necessity for more efficient livestock production methods. Despite higher retail prices, by 12% in 2022 and 16% in 2023, as compared to 2019, pork consumption in Japan rose by 7% in quantity in 2022 and during the first five months of 2023.

The market is strongly affected by innovation as organizations channel funds into research and development, aimed at coming up with other, more efficient and organic additives. Furthermore, the focus on decreasing the number of antibiotics used in livestock production has led to a surge in requirements for alternatives which are meant to enhance animal wellbeing without any dependence upon anti-microbial agents.

Difficulties have been posed by varying costs of raw materials and complex regulatory frameworks which must be complied. Nevertheless, possibilities exist within the context of increasing demand for organic and natural feed additives, caused by consumers' inclination towards meats and dairy products that are sustainably produced. As a result, Japan feed additives market

is expected to maintain a moderate growth trajectory, underpinned by innovations and diversification of consumer preferences.

Rising Demand for Meat and Dairy Products Fuels Market Growth

Feed additives market in Japan is mainly driven by increased demand for meat and dairy products. There has been a shift towards higher consumption of meat and dairy products as Japanese citizens seek diets rich in proteins. Changing lifestyles, urbanization, and the impact of Western style eating habits are driving forces behind the rising demand for beef, pork, poultry, milk, and its derivatives such as cheese or yogurt.

In 2022, 3.9 million tons of meat was sold in Japan. With 1.8 million tons, which is 46.1% of meat sales. Pork accounted for the highest amount of meat sold in Japan, followed by poultry of 1.3 million tons and beef of 0.8 million tons.

To respond to this requirement, farmers raising livestock are forced to increase production rate and assuring quality of products. The result has been an increased demand for high quality feed additives that can stimulate growth rate in animals, enhance feed efficiency, and maintain wellness in livestock. Optimizing animal nutrition using feed additives such as vitamins, minerals, and enzymes has a direct influence on yield and quality of meat and milk.

In addition, growing emphasis is being placed on additives that promote production of healthier, safer, and more nutritious animal products due to the fact that consumers are becoming more aware of food safety and quality.

Focus on Reducing Methane Emissions Catalyze Market Expansion

In livestock production, there is an increasing emphasis placed on reducing methane emissions, making more impact on Japan feed additives market. Methane is a strong greenhouse gas, and is mainly produced during digestion process by ruminant animals such as cows. As Japan reaffirms its commitment to environmental conservation and lessening greenhouse gas discharges, greater attention is being paid towards curbing methane release from animals which are significant agricultural pollutants.

It was estimated that a dairy cow's burps release 500 liters of methane every day. Roughly 5% of global greenhouse gas emissions are attributed to the belches of ruminant animals, such as cattle.

In May 2024, Sunshiki Co. tried to mass-produce seaweed to help lower methane gas released in cattle burps. The business discovered that adding certain seaweed to cattle's diets reduces greenhouse gas emissions from cow belches.

In this endeavor, the role of feed additives is paramount. It has been observed that certain enzymes, probiotics, and essential oils can modify the rumen fermentation process, thus reducing methane output during digestion. Apart from reducing the ecological footprint caused by livestock farming, these additives are known to enhance feed efficiency and animal output making them a desirable option for farmers.

Ruminants Hold a Larger Market Share

Ruminants, most notably cattle, have monopolized the market for feed additives in Japan. It is due to the fact that beef and dairy industries are essential parts of Japan's agriculture, making ruminants a crucial area of concern. Thus, high quality beef such as wagyu and milk products create a need for sophisticated feed additives that can enhance animal health, productivity, and product quality.

Feed additives for ruminants play a pivotal role in improving feed efficiency, enhancing digestion and increasing overall livestock productivity. It applies more specifically to dairy cows, for maintaining milk yield and quality, and beef cattle for premium beef production that relies on them. Furthermore, Japan's increased focus on reducing methane emissions from livestock has resulted in higher demand for feed additives that reduce methane output by ruminants.

In May 2024, a memorandum of understanding was signed by Meiji Holdings Co., Ltd. and DSM-Firmenich AG to improve the sustainability of Japanese dairy farming by implementing Bovaer. This is Asia's first accord of its kind. Methane emissions from dairy and feedlot can be decreased by about 30% and 45%, respectively, with the use of Bovaer.

The domination of ruminants in the feed additives industry is reinforced by the country's commitment to food safety, sustainability, and meeting the high-quality parameters that are crucial for both domestic and foreign markets for meat and milk products originating from Japan.

Future Market Scenario (FY2025 - FY2032F)

- With increased attention towards climate change across the world, Japan is expected to improve its efforts in minimizing the effects of livestock production on the environment. This will, in all probability, increase the need for feed additives which lower methane release and improve feed efficiency.
- The future of feed additives market would highly rely on innovations in biotechnology and in precision nutrition.

Key Players Landscape and Outlook

The key players in Japan feed additives market operate in a highly competitive and regulated environment, focusing on innovation, quality, and sustainability. These companies are actively engaged in research and development to introduce advanced feed additives that cater to the specific needs of the Japanese livestock industry, such as enhancing feed efficiency, reducing environmental impact, and improving animal health.

The market landscape is characterized by the presence of both domestic and international players, each striving to gain a competitive edge through product differentiation and technological advancements. Companies are increasingly focusing on natural and organic additives, driven by the rising demand for antibiotic-free and sustainably produced meat and dairy products. This trend is expected to shape the future outlook of the market, with players investing in alternative additives such as probiotics, enzymes, and amino acids.

Strategic collaborations, mergers, and acquisitions are likely to play a crucial role in the market's evolution, as companies seek to expand their product portfolios and strengthen their market presence. For instance, in October 2022, Bioiberica S.A.U. collaborated with Asuka Animal Health Co., Ltd. and Shintoa Corporation to offer its Nucleoforce Livestock and Nucleoforce Aqua ranges, with Palbio ingredients in Japan. Both the companies will help Bioiberica S.A.U. to access and engage new clients throughout Japan to offer latest advancements in the animal health industry.

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