

Vietnam Animal Feed Additives Market By Product (Antibiotics, Vitamins, Antioxidants, Amino Acids, Feed Enzymes, Feed Acidifiers, and Others), By Livestock (Pork/Swine, Poultry, Cattle, Aquaculture, Others), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Report description:

Vietnam Animal Feed Additives Market was valued at USD 745.33 Million in 2024 and is expected to reach USD 932.92 Million by 2030 with a CAGR of 3.77% during the forecast period. The Vietnam Animal Feed Additives Market is primarily driven by the growing demand for high-quality animal products, such as meat, dairy, and eggs, resulting from an increase in population and rising income levels. As consumers become more health-conscious, there is a rising need for improved feed formulations that promote better animal growth, health, and productivity. Animal feed additives like vitamins, minerals, amino acids, enzymes, and probiotics are increasingly used to enhance the nutritional value of animal feed, ensuring optimal performance in livestock. Additionally, the expansion of the poultry, swine, and aquaculture industries in Vietnam has contributed to the growth of this market, as farmers seek to boost efficiency and reduce costs. The focus on sustainable and safe food production further drives the demand for feed additives that help prevent disease, improve feed conversion rates, and reduce the environmental impact of livestock farming. As the industry modernizes, the demand for high-quality, innovative feed additives is expected to continue rising.

Key Market Drivers

Increasing Demand for High-Quality Animal Products

The growing demand for high-quality animal products in Vietnam is a significant driver for the animal feed additives market. As the Vietnamese population increases and incomes rise, consumer preferences for meat, dairy, and egg products are shifting toward higher-quality and healthier options. In November 2024, Aboitiz Foods has officially opened a USD 44.33 million feed mill in Long An, Vietnam, representing its largest investment in the country. The new facility, covering 3.8 hectares, has an annual production capacity of 300,000 metric tonnes of livestock and animal nutrition feed. This plant enhances Aboitiz Foods' presence

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in Southeast Asia and helps meet the increasing demand for high-quality animal feed in the region.

With more consumers becoming health-conscious, there is a heightened focus on the nutritional value, safety, and quality of the food they consume. This shift is pushing livestock producers to enhance the quality of their animal products, driving the need for feed additives. Additives like amino acids, enzymes, vitamins, and minerals are essential in ensuring optimal growth, health, and productivity of animals, directly improving the quality of meat, milk, and eggs produced. Feed additives contribute to better nutrient absorption, which enhances the overall health of the animals and improves the nutritional profile of the animal products. The growing preference for high-quality, nutritious, and safe animal products in both domestic and international markets has thus significantly expanded the use of feed additives.

Rising Livestock and Aquaculture Industries

Vietnam's livestock and aquaculture industries are expanding rapidly, contributing directly to the growth of the animal feed additives market.

In October 2024, The AFIA and VSAVA have launched a Pet Health Month campaign in Vietnam, with events scheduled throughout Ho Chi Minh City to educate pet owners on proper veterinary care and nutrition for their pets. The campaign involves Vietnamese veterinarians and pet owners in workshops designed to help them customize pet healthcare and nutrition to better address their pets' physical and biological needs. The country has a large and growing population, and with increasing urbanization and changes in dietary habits, the demand for animal-derived products such as pork, chicken, fish, and seafood has surged. This has led to an increase in the number of livestock and aquaculture farms in Vietnam, necessitating the use of additives to optimize animal health and productivity. In aquaculture, feed additives are used to improve water quality, boost fish health, and enhance feed conversion rates. In livestock, feed additives such as probiotics, enzymes, and amino acids are incorporated into animal feed to ensure the animals grow efficiently, stay healthy, and produce high-quality meat, milk, or eggs. As the industries grow, the demand for feed additives that improve the performance and sustainability of these sectors will continue to rise.

Growing Awareness of Animal Health and Welfare

Vietnamese farmers are becoming increasingly aware of the role that animal health plays in overall productivity and the quality of animal-based products. As a result, there is a growing focus on improving livestock welfare through the use of specialized feed additives. In October 2024, BAF Vietnam Agriculture Joint Stock Company (BAF) announced a high-tech livestock breeding partnership with Muyuan Foods, a leading livestock corporation in China. As part of the collaboration, BAF and Muyuan will work together to transfer advanced smart livestock technology. With Muyuan's assistance, BAF Vietnam will significantly enhance its closed-chain system, covering everything from animal feed factories to barn models. Probiotics, prebiotics, and other additives that support the immune system, enhance digestion, and reduce disease risk are gaining popularity. By improving gut health and preventing diseases, feed additives help reduce the reliance on antibiotics, which are a growing concern among consumers due to their potential health risks. This increased awareness of animal health is driving the demand for additives that promote better well-being, reduce the need for medical interventions, and help improve animal productivity. As the awareness of animal welfare continues to grow in Vietnam, feed additives that ensure healthier and more sustainable farming practices will become more integral to livestock operations.

Government Initiatives and Regulatory Support

Government support and regulatory frameworks are also playing a crucial role in driving the growth of the animal feed additives market in Vietnam. In September 2024, The American Feed Industry Association (AFIA) has signed a memorandum of understanding (MOU) with the Vietnam Feed Association (VFA) and the Animal Husbandry Association of Vietnam (AHAV) to enhance the country's feed and animal production industries. The signing ceremony, held in Hanoi, Vietnam, on September 12, underscored the joint commitment to promoting growth, innovation, and sustainability in these sectors across Vietnam. The Vietnamese government has been actively promoting the modernization of agriculture and livestock farming practices to improve food security and sustainability. Regulations that focus on animal health and food safety are encouraging the adoption of higher-quality animal feed. Programs that promote the use of vitamins, minerals, and other nutritional supplements to improve the efficiency of animal farming are helping shape the market dynamics. The government's initiatives to improve agricultural practices and reduce the environmental impact of farming, such as reducing greenhouse gas emissions from livestock, have led to a rise in the use of additives that help improve feed conversion rates and reduce methane emissions. This regulatory and institutional support ensures that feed additives become a fundamental part of animal nutrition and farming practices in Vietnam.

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Focus on Sustainable and Eco-Friendly Practices

Sustainability is becoming a key concern in Vietnam's agricultural and livestock industries, driving the adoption of eco-friendly feed additives. Farmers and producers are increasingly focusing on practices that minimize the environmental impact of livestock farming while maintaining efficiency and productivity. Additives that improve feed conversion, reduce waste, and help manage waste disposal more efficiently are gaining importance. There is a growing demand for additives that can reduce the environmental impact of livestock production, such as reducing greenhouse gas emissions and improving manure management. This focus on sustainability and eco-friendly farming practices is creating new opportunities for feed additive manufacturers to develop products that cater to the growing demand for sustainable agricultural practices in Vietnam.

Key Market Challenges

Price Sensitivity and Cost Constraints

One of the significant challenges facing the Vietnam animal feed additives market is the price sensitivity among livestock and aquaculture producers. While there is an increasing demand for high-quality feed additives to enhance animal health, productivity, and product quality, many producers, especially small- and medium-sized farmers, face constraints in terms of cost. For many farmers, especially in rural regions of Vietnam, the cost of purchasing high-quality feed additives can be a major barrier. With limited resources and lower profit margins, farmers may be reluctant to invest in feed additives, even if they could improve animal performance and product quality in the long term. Although feed additives have the potential to enhance growth rates, immune systems, and feed conversion efficiency, they often come at a higher cost compared to conventional feed ingredients. This price gap can be particularly problematic for smaller operations, where the financial ability to invest in more expensive additives is constrained. Additionally, while larger-scale farms may have more resources to incorporate advanced feed additives, smaller producers might opt for cheaper alternatives or even avoid using additives altogether. This can prevent the market from reaching its full potential in terms of widespread adoption.

The issue of price sensitivity also extends to consumers. In Vietnam, the animal feed market is highly competitive, and producers are under constant pressure to reduce costs while maintaining product quality. This often leads to a challenge in finding the right balance between incorporating beneficial feed additives and keeping the cost of production low enough to remain competitive in the market. Manufacturers of feed additives must therefore be innovative in reducing production costs, offering competitive pricing, and creating value propositions that appeal to both large and small farmers.

Lack of Awareness and Knowledge about Feed Additives

Another significant challenge for the Vietnam animal feed additives market is the lack of awareness and understanding of feed additives among farmers and producers, particularly in rural areas. While awareness is growing in urban centers and among large-scale producers, many small-scale and traditional farmers are still unaware of the benefits of feed additives and their potential to improve livestock and aquaculture productivity. This lack of knowledge can lead to underutilization or reluctance to adopt modern feed formulations, which can inhibit market growth.

Vietnam's rural agricultural sector is still largely based on traditional farming methods, and the use of feed additives is not yet fully ingrained in these practices. Many farmers still rely on conventional feeding methods and are often hesitant to try new products due to concerns about their effectiveness, safety, or cost. This lack of familiarity with the products and their benefits means that many livestock and aquaculture farmers may not fully understand the potential advantages of using feed additives, such as improved feed conversion, enhanced animal health, and higher-quality meat or milk production. In addition to general awareness, there is also a gap in specialized knowledge regarding the different types of feed additives and their specific uses. The market offers a wide range of additives, including probiotics, enzymes, amino acids, and vitamins, but many farmers do not know how to choose the right product for their specific needs. Without proper guidance, farmers may not realize the value that these additives can provide, leading to underinvestment in products that could significantly enhance their operations.

Key Market Trends

Advancements in Feed Additive Technologies

Technological advancements in animal feed additive formulations are another key driver for the Vietnam market. Over the years, innovations in feed additives have improved their efficacy and ease of use. In May 2023, Japfa Comfeed Vietnam Co., Ltd. (Japfa Vietnam) officially opened its animal feed mill and slaughterhouse in the Minh Hung Sikico industrial zone, located in Hon Quan district, Binh Phuoc province, Vietnam. The development of functional additives, such as enzymes, organic acids, and probiotics,

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has enabled farmers to improve animal health and productivity more effectively. Advances in feed formulations that can target specific nutritional needs of different livestock and fish species are increasing the adoption of feed additives. The emergence of smarter, more efficient, and cost-effective additives also makes it easier for farmers to incorporate these products into their feed strategies, driving market growth. The integration of feed additives with automation and precision farming technologies provides additional benefits in terms of optimal feed management, increasing efficiency and sustainability.

Increasing Export Demand for Animal Products

Vietnam's growing role as a key player in global agricultural and food markets is also contributing to the rising demand for feed additives. The country's animal-based exports, particularly pork, seafood, and poultry, are on the rise due to improved production methods and meeting international quality standards. To meet the requirements of export markets, Vietnamese producers are increasingly adopting international standards in animal husbandry, which includes the use of high-quality animal feed. To ensure that the animals are healthy, produce high-quality products, and meet the nutritional standards required for export, feed additives such as amino acids, vitamins, and minerals are being incorporated into animal feed. As Vietnam continues to expand its export footprint in the global market, the demand for high-quality feed additives will continue to increase.

Segmental Insights

Product Insights

Based on the Product, Vitamins are currently dominating the market. The widespread use of vitamins in animal feed is driven by their critical role in ensuring the health, growth, and productivity of livestock, poultry, and aquaculture species. Vitamins such as A, D, E, and B complex are essential for enhancing immune function, promoting better growth rates, and improving reproductive performance. In Vietnam, the growing demand for high-quality animal products like meat, eggs, and dairy products has spurred the need for optimized animal nutrition, leading to a significant rise in the use of vitamin-based additives in feed.

Vitamins are crucial for maintaining the overall health of animals, supporting their metabolic functions, and preventing nutrient deficiencies that could otherwise impair their growth or productivity. For instance, vitamin D is vital for calcium absorption and bone development, while vitamin A supports vision, skin health, and immune function. Vitamins are essential in addressing common deficiencies in animal diets, particularly in intensive farming systems where feed quality can vary. By supplementing animal feed with vitamins, farmers can ensure that animals are receiving the nutrients they need to stay healthy and perform optimally, directly contributing to the profitability of livestock and aquaculture farms. The growth of the Vietnamese livestock and aquaculture industries, combined with an increasing middle-class population and rising consumer demand for nutritious and high-quality animal products, has created a favorable environment for the dominance of vitamins in the feed additives market. Regulatory authorities in Vietnam have been placing more emphasis on improving animal health and safety, which has driven the adoption of quality supplements, including vitamins, to meet international food safety standards.

Livestock Insights

Based on the Livestock, Poultry is currently dominating the animal feed additives market. The rapid expansion of the poultry industry in Vietnam, driven by increasing consumer demand for chicken and eggs, has significantly contributed to the rising demand for specialized feed additives. Poultry farming in Vietnam is one of the largest contributors to the overall animal production industry, and as consumer preferences shift toward more affordable and high-protein animal products, the poultry sector is seeing substantial growth. This expansion directly drives the need for animal feed additives that enhance the health, productivity, and overall performance of poultry.

Feed additives, including vitamins, amino acids, enzymes, and probiotics, play a crucial role in optimizing poultry health and improving growth rates, feed conversion efficiency, and egg production. For instance, vitamins are essential for boosting the immune system and supporting the metabolism of poultry, while amino acids are used to improve protein synthesis and muscle development, resulting in better-quality meat. The addition of probiotics and prebiotics in poultry feed helps support gut health and enhances digestion, thereby reducing the reliance on antibiotics. This is particularly important given the increasing concerns around antibiotic use in animal farming and the global push for safer, antibiotic-free food production. The poultry industry's rapid growth in Vietnam has been fueled by rising disposable incomes, urbanization, and a growing preference for poultry over other meat types like pork or beef due to its lower price and health benefits. As consumer demand for poultry products continues to rise, farmers are increasingly turning to feed additives to meet the growing need for high-quality, efficient poultry farming practices.

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Regional Insights

Southern Vietnam is currently dominating the Vietnam Animal Feed Additives Market. The southern region of Vietnam, which includes major economic hubs such as Ho Chi Minh City, is the leading driver of growth in the animal feed additives sector. This is primarily due to the concentration of the country's industrial farming, aquaculture, and livestock sectors in this region. Southern Vietnam is home to the largest agricultural production areas and commercial farms that utilize feed additives to enhance productivity and animal health.

The region's strong industrial base, coupled with its well-developed infrastructure, makes it a key player in the overall agricultural landscape. Southern Vietnam has seen a surge in poultry farming, aquaculture, and swine production, all of which significantly contribute to the growing demand for animal feed additives. The industrialized farming practices in this region are characterized by high production volumes and a focus on meeting both domestic and international market needs. Consequently, there is an increased reliance on feed additives to optimize growth, improve feed conversion rates, and enhance product quality.

Ho Chi Minh City, as the commercial and financial center of the country, plays a crucial role in the distribution and sale of animal feed additives, making it a major market hub. The city's proximity to ports, such as the Saigon Newport Port, also facilitates the importation of feed additive ingredients, further driving market growth in the southern region. Additionally, the presence of numerous multinational and local feed manufacturing companies in Southern Vietnam contributes to the region's dominance in the feed additives market.

Key Market Players

- BASF Vietnam Limited
- C.P. Vietnam Corporation
- Cargill Vietnam Limited
- Hong Ha Nutrition Joint Stock Company
- Japfa Comfeed Vietnam
- Vietnamese-French Cattle Feed Joint Stock Company
- Viet Thang Feed Joint Stock Company
- Greenfeed Viet Nam Corporation
- Mavin Austfeed Joint Stock Company
- DABACO Group Joint Stock Company

Report Scope:

In this report, the Vietnam Animal Feed Additives Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□ Vietnam Animal Feed Additives Market, By Product:

- o Antibiotics
- o Vitamins
- o Antioxidants
- o Amino Acids
- o Feed Enzymes
- o Feed Acidifiers
- o Others

□ Vietnam Animal Feed Additives Market, By Livestock:

- o Pork/Swine
- o Poultry
- o Cattle
- o Aquaculture
- o Others

□ Vietnam Animal Feed Additives Market, By Region:

- o Southern Vietnam
- o Northern Vietnam

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o Central Vietnam

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Vietnam Animal Feed Additives Market.

Available Customizations:

Vietnam Animal Feed Additives Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

□□ Detailed analysis and profiling of additional market players (up to five).

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