

**Specialty Feed Additives Market by Livestock, Type (Phytogenics, Organic Acids, Probiotics, Mycotoxin Binders & Modifiers, Algae Omega-3, Pellet Binders, Flavors & Sweeteners, Water Disinfectants, and Antioxidants), Form, Source, Function, Manufacturing Technology, and Region - Global Forecast to 2030**

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**Report description:**

The specialty feed additives market is estimated at USD 16.81 billion in 2025 and is projected to reach USD 21.01 billion by 2030, at a CAGR of 4.6%.

<https://www.marketsandmarkets.com/Images/specialty-feed-additives-market-new.webp>

The specialty feed additives market is experiencing steady growth due to rising global demand for high-quality animal protein and increasing emphasis on animal health and performance. These additives, including amino acids, enzymes, organic acids, phytogenics, and mycotoxin binders, play a vital role in enhancing feed efficiency, improving gut health, and boosting immunity in livestock. The market is driven by the shift toward antibiotic-free production, growing awareness about animal welfare, and stringent feed safety regulations. In regions such as Asia-Pacific and Latin America, industrialization of animal farming and rapid urbanization are accelerating the adoption of performance-enhancing additives. However, the industry faces challenges such as fluctuating raw material prices, supply chain disruptions, and regulatory complexities.

"Disruptions in the specialty feed additives market"

The landscape for specialty feed additives is difficult due to broad-based global issues, as overall feed production fell by 0.2% in 2023. The decreased production is driven by the increasing costs of production, geopolitical tensions, and increased considerations of supply for animal feed, which have created pressures on the sector. Key issues include increased costs of

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production, geographic tensions, and climate change, which contribute to the complications of supply in Europe and the shifts associated with the cattle cycle in the United States. Feed efficiency is improving in parts of the world, including the Americas. It has alleviated some issues caused by unpredictability in the supply of raw materials, although cost and availability are still global issues of concern for their implications on production and price.

The market is influenced by four key factors: advances in animal nutrition, geopolitical tensions, food security, and energy issues. Geopolitical tensions between nations are influencing the market. Examples include the conflict between the US and China as well as the Ukraine-Russia conflict, which has re-positioned global supply chains, increased production costs and shipping costs, and redirected consumer preferences away from animal protein. Second, plant-based natural feeds and sustainability trends are impacting the market by developing innovations and feed additives, as these trends also prominently impact operational costs and health concerns.

"The dry form is projected to be dominant in the market."

The dry specialty feed additive market is projected to be dominant because mash feed costs less than pellet feed, which consumes 10% more expenses during the mechanical pelletization process. The process minimizes feed loss and increases the body's ability to digest nutrients. The poultry industry prefers crumbling because it consists of broken pellets, which provide simple feeding solutions for broiler birds. Dry forms attract livestock producers because they offer superior storage capabilities and better resistance to degradation compared to liquid forms. The stable nature of this product minimizes waste and expenses while its dry composition results in lower transportation costs and reduced packaging requirements. The ease of use for manufacturers and users comes from dry additives that resist temperature variations and help products last longer on store shelves. Market participants predominantly distribute dry products, including flavors, sweeteners, probiotics, acidifiers, mycotoxin binders, antioxidants that enhance digestibility and palatability, and feed conversion ratios in livestock.

"The probiotics segment will hold a significant market share among the types in the specialty feed additives market."

The probiotic segment holds a significant share within the type segment of the specialty feed additives market. Probiotic adoption has increased in regions such as Europe due to restrictions on antibiotics in feed additives, consumer preferences for antibiotic-free products, and environmental sustainability. A 2024 Penn State study found that probiotics, like *Bacillus subtilis* and *Bacillus amyloliquefaciens*, improve gut health, nutrient absorption, and growth performance in 320 broiler chicks. Targeting poultry health in tropical regions, Evonik recently introduced Ecobiol Soluble Plus in India, which was unveiled at Poultry India 2024 and is expected to support market expansion. Probiotics are expected to witness significant growth in the specialty feed additives market, driven by strategic industry collaborations, continuous innovation, rising global meat consumption, and increasing research focused on sustainable animal nutrition solutions.

"The US is projected to dominate the North American specialty feed additives market during the forecast period."

In 2024, the US meat industry demonstrated exceptional export performance, affirming its leadership, innovation, and competitive advantage in the global protein supply chain. US pork exports reached a historic high of 3.03 million tonnes (3.34 million tons), valued at USD 8.63 billion, while the industry recorded a peak export value of USD 66.53 per head slaughtered, underscoring robust international demand and the consistent quality of US pork. Similarly, US beef exports delivered a record value of USD 10.45 billion, with per-head export value rising to USD 415.08, reflecting the premium positioning of US beef in overseas markets despite supply-side constraints.

Complementing this strong export performance, the US continues to hold a dominant share in the North American specialty feed additives market, supported by innovation-led advancements. A notable development in 2024 was Kemin Industries Inc.'s (US) launch of FORMYL, a next-generation swine feed acidifier developed by its Animal Nutrition and Health - North America division. The product utilizes a proprietary encapsulated blend of calcium formate and citric acid to promote gut health and enhance pig productivity via a non-antibiotic mechanism. Its targeted action in the gastrointestinal tract aids in pH reduction and supports pathogen control, reflecting the US industry's commitment to advancing feed technologies and maintaining its leadership in specialty additives.

In-depth interviews have been conducted with chief executive officers (CEOs), directors, and other executives from various key organizations operating in the specialty feed additives market.

-□By Company Type: Tier 1 - 25%, Tier 2 - 45%, and Tier 3 - 30%

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-□By Designation: CXOs - 20%, Managers - 50%, Executives - 30%

-□By Region: North America - 25%, Europe - 20%, Asia Pacific - 30%, South America - 15%, and Rest of the World - 10%

Prominent companies in the market include Cargill, Incorporated (US), ADM (US), International Flavors & Fragrances Inc. (US), Evonik Industries AG (Germany), BASF SE (Germany), Novonesis Group (Denmark), Adisseo (France), Solvay (Belgium), Nutreco (Netherlands), Kemin Industries, Inc. (US), and Lallemand Inc. (Canada).

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## Research Coverage

This research report categorizes the specialty feed additives market by type (phytogenics, organic acids, probiotics, mycotoxin binders & modifiers, algae omega 3, pellet binders, probiotics, antioxidants, water disinfectants, flavors & sweeteners), livestock (poultry, swine, ruminants, aquatic animals & companion animals), form (dry, liquid), source (natural, synthetic), functions, and manufacturing technology (qualitative), and region (North America, Europe, Asia Pacific, South America, and Rest of the World). The report's scope covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of specialty feed additives. A thorough analysis of the key industry players has provided insights into their business, services, key strategies, contracts, partnerships, agreements, product launches, mergers & acquisitions, and recent developments associated with the specialty feed additives market. This report covers the competitive analysis of upcoming startups in the specialty feed additives market ecosystem. Furthermore, industry-specific trends such as technology analysis, ecosystem & market mapping, and patent & regulatory landscape, among others, are also covered in the study.

## Reasons to Buy This Report

The report will offer market leaders/new entrants' information on the closest approximate revenue numbers for the overall specialty feed additives and subsegments. It will also help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the market pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following points:

-□Analysis of key drivers (Increased demand for meat-based products drives the demand), restraints (reliance on antibiotics for growth promotion in livestock production), opportunities (evolution of precision livestock farming), and challenges (fluctuating raw material costs) influencing the growth of the specialty feed additives market

-□Product Development/Innovation: Detailed insights into research & development activities and new product launches in the specialty feed additives market

-□Market Development: Comprehensive information about lucrative market analysis of specialty feed additives across varied regions

-□Market Diversification: Exhaustive information about new product sources, untapped geographies, recent developments, and investments in the specialty feed additives market

-□Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings, brand/product comparison, and product footprints of leading players such as Cargill, Incorporated (US), ADM (US), International Flavors & Fragrances Inc. (US), and other players in the specialty feed additives market

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