Animal Feed Organic Trace Minerals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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Report description:

Animal Feed Organic Trace Minerals Market Analysis

The animal feed organic trace minerals market reached USD 150.3 million in 2025 and is projected to grow to USD 197.3 million by 2030 at a CAGR of 5.6%. The market expansion is driven by the transition from antibiotic growth promoters to bioavailable mineral solutions that comply with discharge regulations while maintaining productivity. Chelated minerals provide 2-3 times higher absorption compared to inorganic variants, allowing reduced inclusion rates without affecting animal performance. The adoption of digital feed-formulation technologies enhances dosage accuracy and demonstrates clear returns on investment. Market competition focuses on developing proprietary chelation technologies, implementing AI-based nutrition systems, and expanding regional production capacity to reduce supply chain vulnerabilities and protect customers from raw material price fluctuations.

Global Animal Feed Organic Trace Minerals Market Trends and Insights

Escalating Demand for High-Quality Animal Protein

The increasing disposable income in Asia-Pacific and South America has elevated the consumption of premium meat, milk, fish, and eggs, prompting producers to focus on nutritional value enhancement rather than volume production. The use of chelated selenium and zinc improves antioxidant levels, extends product shelf-life, and enhances sensory characteristics, enabling higher retail prices. Research indicates that bioavailable minerals deliver 3-5% better feed conversion compared to inorganic salts,

compensating for higher additive costs while meeting lean-meat requirements. Retail chains include mineral-enrichment specifications in supplier agreements, driving adoption throughout integrated supply chains. Additionally, governments in regions with protein deficiency promote mineral optimization as part of their food security initiatives.

Stringent Bans on Antibiotic Growth Promoters (AGPs)

The ban on routine in-feed antibiotics by North American and European regulators, along with upcoming phase-out policies in Asia-Pacific markets, has created a productivity challenge in animal farming. Zinc and copper chelates have emerged as crucial alternatives, as they help maintain gut health and enhance immune function. Field trials conducted after the antibiotic ban demonstrate that organic mineral supplementation programs can achieve up to 90% of previous weight-gain performance, helping maintain profitability in intensive farming operations. Feed manufacturers are now combining chelated minerals with phytogenic compounds to develop antibiotic-free feed concentrates at premium price points. The implementation of antibiotic restrictions across emerging economies is expanding the market potential for animal feed organic trace minerals.

Premium Pricing Versus Inorganic Counterparts

Organic trace minerals cost 2-4 times more than oxides or sulfates, which limits their adoption in the poultry and pig sectors, where feed represents over 70% of production costs. The volatility in corn and soybean meal prices increases scrutiny of feed additives. Producers require a return on investment analyses supported by data before implementing chelated mineral programs. Nutrition companies offer tiered product lines, volume rebates, and bundled formulations to distribute costs across multiple performance benefits. Digital calculators that convert inclusion rates into carcass-yield gains help demonstrate value beyond feed cost considerations.

Other drivers and restraints analyzed in the detailed report include:

Tighter Manure-Phosphorus and Heavy-Metal Discharge Regulations / Rapid Adoption of Precision-Chelation and Micro-Encapsulation Technology / Limited Awareness Among Smallholder Farmers /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Zinc maintained 36% of the animal feed organic trace minerals market share in 2024, supported by its essential role in over 80 metalloenzymes that influence immune function, epithelial integrity, and reproduction. The higher bioavailability of organic zinc enables producers to reduce dietary inclusion rates while meeting environmental excretion limits, resulting in lower environmental fees and improved profit margins. Selenium, despite its minimal dietary requirement, achieved the highest growth rate at 8.1% CAGR, driven by processors seeking enhanced antioxidant properties to extend the shelf-life of chilled meat, particularly in aquaculture fillets susceptible to oxidative deterioration during maritime transport. Copper, manganese, and iron remain essential nutrients but face strict inclusion limits, increasing the demand for chelated forms that maintain performance at reduced concentrations.

The distribution of trace elements reflects both biological requirements and regulatory constraints. While zinc maintains market dominance, selenium commands higher prices and benefits from marketing advantages through "selenium-enriched" product labeling. Cobalt and chromium serve specific functions in rumen metabolism and glucose utilization, while iodine and molybdenum address regional deficiency issues. Market growth favors elements that improve product quality while helping meet waste management regulations. These factors create an interconnected foundation for the animal feed organic trace minerals market.

The Animal Feed Organic Trace Minerals Market Report is Segmented by Trace Element Type (Zinc, Iron, Copper, Manganese, Selenium, and More), by Chelation Type (Amino-Acid Chelates, Proteinates, and More), by Animal Type (Dairy Cattle, Beef Cattle, Poultry, and More), and by Geography (North America, Europe, Aisa-Pacific, South America, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific holds 44% of the 2024 revenue in the animal feed organic trace minerals market, driven by China's aquaculture production and India's growing broiler and shrimp industries. Government subsidies for domestic feed additives increase the adoption of high-absorption mineral formats. The region's market size benefits from concentrated production clusters that reduce logistics costs and enable direct relationships between suppliers and integrators. Japan and South Korea's technical expertise and research capabilities support the implementation of advanced chelates with proven environmental benefits.

The Middle East market projects an 8.1% CAGR through 2030, supported by government investments in protein production capacity, including Saudi Arabia's target of 600,000 metric tons of fish by 2030. The region's water scarcity necessitates precise mineral feeding to reduce effluent discharge. Feed mills positioned near coastal farming centers minimize oxidation during transport, increasing demand for temperature-resistant trace mineral formats.

North America and Europe represent established markets where regulatory requirements and sustainability commitments generate steady growth. The FDA's Veterinary Feed Directive and European restrictions on antibiotic usage encourage organic mineral supplementation to maintain animal performance. Environmental regulations on mineral discharge promote the use of highly bioavailable forms. South America shows growth potential as swine and poultry integrators enhance nutrition programs to comply with export market requirements, balancing cost considerations with increased adoption of chelated minerals. These regional developments indicate diverse growth opportunities in the animal feed organic trace minerals market.

List of Companies Covered in this Report:

Alltech / ADM / Balchem Corp. / Biochem Zusatzstoffe Handels / DSM-Firmenich / Adisseo (A Bluestar Company) / Cargill, Incorporated / Kemin Industries, Inc. / Novus International, Inc. / SHV (Nutreco NV) / Orffa / BASF SE / Phibro Animal Health / Zinpro / Vamso Biotec Pvt. Ltd. /

Additional Benefits:

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

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