

Eubiotics - 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:

Eubiotics Market Analysis

The Eubiotics Market size is estimated at USD 6.30 billion in 2025 and is projected to reach USD 9.04 billion by 2030, at a CAGR of 7.50% during the forecast period (2025-2030). Rising restrictions on antibiotic growth promoters, steady gains in aquaculture output, and precision nutrition technologies are accelerating the adoption of probiotics, organic acids, prebiotics, and phyto-genic additives across all livestock segments. Large retailers that mandate antibiotic-free supply chains reinforce demand momentum, while digital livestock systems show measurable feed-cost savings and lower nitrogen excretion when coupled with targeted eubiotic programs. Supply-chain resilience and circular-economy sourcing strengthen competitive positioning, and regulatory convergence in North America and Asia-Pacific reduces approval complexity for globally harmonized product launches. Moderate market concentration leaves room for regional specialists who can tailor formulations to local raw-material bases and environmental pressures. Across all trends, the eubiotics market continues to pivot from broad-spectrum antibiotics toward sustainable gut-health solutions that deliver quantifiable farm-level returns.

Global Eubiotics Market Trends and Insights

Regulatory restrictions on antibiotic growth promoters

The formal phase-out of antibiotic growth promoters across major livestock regions has set an irreversible shift toward eubiotics. Regulation (EC) No 1831/2003 created a rigorous safety dossier process that many other jurisdictions now mirror, resulting in a

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clearer, more standardized approval path that rewards suppliers with robust clinical data packages. As the U.S. FDA's Innovative FEED Act introduces similar streamlining, multinational producers can coordinate dossier submissions, shorten time-to-market, and deploy harmonized formulations that meet common safety thresholds.

Rising consumer demand for antibiotic-free animal products

Demand for antibiotic-free meat and dairy has moved from niche to mainstream. Large grocery chains impose supplier policies that eliminate antibiotic use, pushing producers toward eubiotics despite higher additive costs. Premium shelf prices offset these costs and create a compelling economic case, particularly in urban Europe, North America, and advanced Asian economies where consumers link antibiotic stewardship to health and food safety.

High costs and complex regulatory approval processes

High costs and complex regulatory approval processes slow product launches and raise entry barriers for smaller suppliers. Submitting a full EFSA safety dossier can cost several million EUR and extend timelines to 3-4 years, tying up capital that could otherwise fund Research and Development. Diverging post-Brexit rules mean companies must now prepare separate submissions for the EU and the UK, duplicating documentation and laboratory studies. These burdens tilt competitive advantage toward multinationals with dedicated regulatory teams and can discourage investment in novel mechanisms of action that lack a clear pathway to fast approval.

Other drivers and restraints analyzed in the detailed report include:

Expansion of aquaculture production globally / Technological advances in precision nutrition and delivery systems / Supply-chain volatility and raw-material sourcing challenges /

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

Segment Analysis

Probiotics held a 41.7% 2024 revenue share, underpinning the largest slice of the eubiotics market. Their dominance stems from extensive clinical validation, reliable performance across climates, and accommodating regulatory precedents that expedite approvals. The segment's *Bacillus* spores tolerate pelleting temperatures, ensuring delivery past the proventriculus and into the ileum, where competitive exclusion exerts its effect. Synbiotic formulations that blend probiotics with fructooligosaccharide prebiotics show feed-conversion improvements of 3-4%, validating complementary mechanisms.

Essential oils record the fastest 9.80% CAGR to 2030. Consumer preference for plant-based antimicrobials and the compounds' multilayered actions on gut microbes drive uptake. Micro-encapsulation of thymol, carvacrol, and cinnamaldehyde stabilizes volatile compounds, and inclusion rates as low as 100 ppm deliver measurable pathogen suppression. Organic acids and prebiotics retain niche roles in acidification and substrate provisioning, while multi-modal blends aim to capture synergistic benefits. Collective progress in formulation science cements the eubiotics market as the central platform for gut-health innovation.

Poultry contributed 34.5% of 2024 revenue, reflecting decades of antibiotic-alternative programs in broilers and layers. Inclusion rates average 500 g per metric ton of feed, and cumulative lifetime feed-conversion gains deliver strong cost-benefit ratios. Aquaculture's 8.60% forecast CAGR shifts relative growth toward marine and freshwater species. Shrimp, tilapia, and hybrid grouper trials indicate pathogen load reductions exceeding 30% when precise water-stable probiotics are dosed through automated feeders.

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Swine operations integrate multi-strain probiotics post-weaning to curb enterotoxigenic *Escherichia coli*. Ruminant adoption lags due to complex rumen dynamics, yet propionibacterium blends that modulate volatile fatty acid ratios gain traction as methane-reduction tools. Companion-animal formulations segment adds a premium layer where pet-food marketers leverage the humanization trend to justify higher price points. Collectively, animal-specific optimization widens the eubiotics market size while allowing specialty suppliers to capture margin through proprietary strains.

The Eubiotics Market Report is Segmented by Type (Prebiotics, Probiotics, Organic Acids, and Essential Oils), Animal Type (Ruminants, Poultry, Swine, Aquaculture, and More), Form (Dry and Liquid), Function (Immunity Enhancement and More), and Geography (North America, Europe, Asia-Pacific, South America, Middle East, and Africa). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Europe's 34.9% revenue share in 2024 stems from stringent feed-additive rules, high producer awareness, and established distribution infrastructure. Product developers benefit from proximity to fermentation inputs, veterinary universities, and contract research labs that speed proprietary-strain screening. The EU Organic Action Plan triggers incremental demand for certified eubiotics that complement organic livestock diets while addressing vitamin and amino-acid gaps. Regulatory divergence following Brexit introduces dual-registration costs but also niche opportunities for fast-track approvals under UK guidelines.

The Middle East delivers the fastest 7.90% CAGR, anchored by aquaculture megaprojects under Saudi Vision 2030. Gulf Cooperation Council countries invest in desert-climate aquafeed facilities that marry single-cell protein and eubiotics to close domestic protein gaps. Government feed-subsidy schemes reward local producers that integrate sustainable gut health solutions to minimize antibiotic residues and align with halal and green-label standards.

Asia-Pacific shows heterogeneous patterns. Advanced markets like Japan and South Korea emphasize value-added formulations and traceability, while China and India focus on cost-effective blends due to scale. Regulatory clearance remains slower in China, yet local production clusters in Shandong and Fujian provinces shorten supply chains. South American producers leverage abundant botanical raw materials to develop essential oil blends domestically, providing cost advantages in export-oriented beef and poultry sectors.

List of Companies Covered in this Report:

BASF SE / dsm-firmenich / Cargill, Incorporated / Novonesis / ADM / Kemin Industries, Inc. / Lallemand Inc. / Evonik Industries AG / Alltech / Adisseo / Huvepharma / Phibro Animal Health Corporation / Novus International, Inc. / Marubeni Corporation (Orffa) / VetAgro S.p.A. /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
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Table of Contents:

- 1 Introduction
- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

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2 Research Methodology

3 Executive Summary

4 Market Landscape

4.1 Market Overview

4.2 Market Drivers

4.2.1 Regulatory restrictions on antibiotic growth promoters

4.2.2 Rising consumer demand for antibiotic-free animal products

4.2.3 Expansion of aquaculture production globally

4.2.4 Technological advances in precision nutrition and delivery systems

4.2.5 Growing awareness of gut-health importance in animal performance

4.2.6 Increasing focus on sustainable and circular-economy practices

4.3 Market Restraints

4.3.1 High costs and complex regulatory approval processes

4.3.2 Supply-chain volatility and raw-material sourcing challenges

4.3.3 Limited awareness and technical expertise in developing markets

4.3.4 Inconsistent efficacy results and lack of standardization

4.4 Regulatory Landscape

4.5 Technological Outlook

4.6 Porter's Five Forces

4.6.1 Bargaining Power of Suppliers

4.6.2 Bargaining Power of Buyers

4.6.3 Threat of New Entrants

4.6.4 Threat of Substitute Products

4.6.5 Intensity of Competitive Rivalry

5 Market Size and Growth Forecasts (Value, USD)

5.1 By Type

5.1.1 Probiotics

5.1.1.1 Lactobacilli

5.1.1.2 Bifidobacteria

5.1.1.3 Other Probiotics (Bacillus subtilis, Saccharomyces boulardii, etc.)

5.1.2 Prebiotics

5.1.2.1 Inulin

5.1.2.2 Fructo-oligosaccharides

5.1.2.3 Galacto-oligosaccharides

5.1.2.4 Other Prebiotics (Mannan-oligosaccharides, beta-Glucans, etc.)

5.1.3 Organic Acids

5.1.4 Essential Oils (Phytogenics)

5.2 By Animal Type

5.2.1 Ruminant

5.2.2 Poultry

5.2.3 Swine

5.2.4 Aquaculture

5.2.5 Other Animal Types (Companion Animals, Equines, etc.)

5.3 By Form

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- 5.3.1 Dry (powder, granule)
- 5.3.2 Liquid (solution, suspension, emulsion)
- 5.4 By Function (Primary Objective)
 - 5.4.1 Gut-health and performance enhancement
 - 5.4.2 Immunity enhancement
 - 5.4.3 Pathogen control / disease mitigation
 - 5.4.4 Feed-efficiency improvement
- 5.5 By Geography
 - 5.5.1 North America
 - 5.5.1.1 United States
 - 5.5.1.2 Canada
 - 5.5.1.3 Mexico
 - 5.5.1.4 Rest of North America
 - 5.5.2 Europe
 - 5.5.2.1 Germany
 - 5.5.2.2 United Kingdom
 - 5.5.2.3 France
 - 5.5.2.4 Spain
 - 5.5.2.5 Italy
 - 5.5.2.6 Russia
 - 5.5.2.7 Rest of Europe
 - 5.5.3 Asia-Pacific
 - 5.5.3.1 China
 - 5.5.3.2 Japan
 - 5.5.3.3 India
 - 5.5.3.4 Australia
 - 5.5.3.5 Rest of Asia-Pacific
 - 5.5.4 South America
 - 5.5.4.1 Brazil
 - 5.5.4.2 Argentina
 - 5.5.4.3 Rest of South America
 - 5.5.5 Middle East
 - 5.5.5.1 Saudi Arabia
 - 5.5.5.2 Turkey
 - 5.5.5.3 Rest of Middle East
 - 5.5.6 Africa
 - 5.5.6.1 South Africa
 - 5.5.6.2 Rest of Africa

6 Competitive Landscape

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level Overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)

6.4.1 BASF SE

6.4.2 dsm-firmenich

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- 6.4.3 Cargill, Incorporated
- 6.4.4 Novonesis
- 6.4.5 ADM
- 6.4.6 Kemin Industries, Inc.
- 6.4.7 Lallemand Inc.
- 6.4.8 Evonik Industries AG
- 6.4.9 Alltech
- 6.4.10 Adisseo
- 6.4.11 Huvepharma
- 6.4.12 Phibro Animal Health Corporation
- 6.4.13 Novus International, Inc.
- 6.4.14 Marubeni Corporation (Orffa)
- 6.4.15 VetAgro S.p.A.

7 Market Opportunities and Future Outlook

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