Feed Enzymes - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

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Report description:

Feed Enzymes Market Analysis

The animal feed enzymes market is expected to grow from USD 1.45 billion in 2025 to USD 1.52 billion in 2026 and is forecast to reach USD 1.92 billion by 2031 at 4.78% CAGR over 2026-2031. Ongoing bans on antibiotic growth promoters, fluctuating feed ingredient prices, and the livestock sector's drive to reduce greenhouse gas emissions are fueling momentum in the industry. The Asia-Pacific region leads in demand, driven by its robust poultry and aquaculture output. Meanwhile, the Middle East is witnessing the swiftest growth, bolstered by food-security initiatives that are modernizing feed mills. While competitive intensity is moderate with the top five suppliers commanding just over half of global revenue, start-ups leveraging synthetic biology are injecting new competition. Major players, like DSM-Firmenich, are realigning portfolios, evident in their divestment of the animal nutrition arm, signaling a sharper focus on high-growth enzyme niches. There's a notable uptick in investments towards precision enzyme solutions, tailored to regional feed ingredients and production nuances. R&D is honing in on multi-enzyme complexes, aiming to tackle several nutritional challenges at once. Furthermore, manufacturers are pioneering novel production methods and enhancing enzyme stability to boost both performance and shelf life.

Global Feed Enzymes Market Trends and Insights

Ban on Antibiotic Growth Promoters Accelerates Enzyme Uptake

Regulatory restrictions on antibiotic growth promoters create immediate substitution demand for enzyme alternatives, with the

European Union's comprehensive ban driving market expansion across member states. Malaysia's recent prohibition of colistin use in animal feed, effective 2024, exemplifies the global regulatory trend toward antibiotic alternatives Malaysian Department of Veterinary Services. This regulatory shift forces livestock producers to seek performance-maintaining alternatives, positioning enzymes as the primary solution for maintaining feed conversion ratios without compromising animal health outcomes. The European Food Safety Authority continues expanding its approved enzyme list, with recent additions including novel carbohydrases and proteases that address specific nutritional challenges in antibiotic-free production systems. Feed manufacturers report enzyme adoption rates increasing 15-20% annually in markets with recent antibiotic restrictions, creating sustained demand growth that extends beyond initial regulatory compliance periods.

Rising Demand for Animal Protein and Industrial Livestock

Global protein consumption patterns drive intensive livestock production expansion, particularly across emerging economies where middle-class dietary transitions fuel compound feed demand growth. China's livestock sector modernization accelerates enzyme adoption as producers seek efficiency gains to meet domestic protein requirements while managing feed cost inflation pressures. Industrial-scale poultry and swine operations increasingly rely on enzyme supplementation to optimize feed utilization rates, with large integrators reporting 3-5% feed conversion improvements through targeted enzyme applications Feed Strategy. Aquaculture expansion in Southeast Asia creates additional enzyme demand, particularly for warm-water species like shrimp and tilapia that benefit from specialized enzyme formulations designed for high-protein, low-fiber diets. This protein demand surge sustains long-term market growth as developing regions industrialize their livestock sectors and adopt Western-style intensive production methods.

Volatile Raw-Material Prices Inflate Production Costs

Enzyme production cost volatility stems from fluctuating prices of fermentation substrates, energy inputs, and specialized processing equipment that compress manufacturer margins and limit pricing flexibility. Corn steep liquor prices, a key enzyme fermentation substrate, increased 25% in 2024 due to ethanol industry demand competition, directly impacting enzyme production economics Renewable Fuels Association. Energy-intensive fermentation and downstream processing operations face additional cost pressures from natural gas price volatility, with European enzyme manufacturers particularly exposed to energy market fluctuations. These cost pressures force enzyme suppliers to implement frequent price adjustments that create adoption hesitancy among price-sensitive feed manufacturers, particularly in emerging markets where margin pressures are most acute. Raw material cost inflation also constrains R&D investment capacity for smaller enzyme developers, potentially slowing innovation cycles and limiting competitive responses to market demands.

Other drivers and restraints analyzed in the detailed report include:

Improved Feed Conversion Efficiency and Cost SavingsSurge in Aquaculture Output, Especially Warm-Water SpeciesLengthy and Complex Regulatory Approvals

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

Segment Analysis

Carbohydrases secured 45.62% of 2025 revenue, underscoring their role in phosphorus release and compliance with discharge limits. It also opens the fastest lane with a 4.99% CAGR to 2031 because they address high-fiber co-products increasingly used to cut ration costs. Rovabio Spire, launched by Adisseo in 2024, illustrates how enhanced thermostability unlocks broader ingredient compatibility. The segment's strong performance is particularly evident in Asia-Pacific, which represents the largest regional market for feed carbohydrases with about 31.12% of the global market share.

The effectiveness of carbohydrases in digesting cereal foods rich in carbohydrates and starch has made them indispensable in the feed enzymes industry, especially during periods of high cereal prices. The segment's growth is further supported by its widespread use in poultry feed, where it accounts for nearly 44.05% of enzyme applications, followed by significant usage in swine and ruminant feed applications.

Across the forecast window, multilayer coated phytases that retain activity above 90 C gain share in high-temperature pelleting regions of South Asia. Meanwhile, proprietary carbohydrase blends tailored for insect meal are tested in European demonstration farms. Synergistic cocktails combining phytase, xylanase, and protease underpin premium offerings that command 20% higher price points yet deliver efficiency gains that justify outlays for integrators chasing sustainability metrics.

The Animal Feed Enzymes Market Report is Segmented by Sub Additive (Carbohydrases, Phytases, and Other Enzymes), Animal (Aquaculture, Poultry, Ruminants, Swine, and Other Animals), and Geography (North America, South America, Europe, Asia-Pacific, Middle East, and Africa). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

Geography Analysis

Asia-Pacific dominates with 31.12% market share in 2025, driven by intensive livestock production expansion across China, India, and Southeast Asian markets where rapid economic development fuels protein consumption growth. However, North America emerges as the fastest-growing region with 4.58% CAGR through 2031, driven by food security initiatives and livestock sector modernization programs that prioritize feed efficiency optimization. Asia-Pacific's aquaculture leadership creates specialized enzyme demand for warm-water species cultivation, while poultry industrialization drives phytase and carbohydrase adoption rates that exceed global averages. China's livestock sector modernization accelerates enzyme adoption as producers seek efficiency gains to meet domestic protein requirements while managing environmental regulations that increasingly restrict antibiotic use in animal production Ministry of Agriculture and Rural Affairs. India's compound feed industry expansion, supported by government initiatives promoting organized livestock farming, creates sustained enzyme demand growth across multiple animal categories.

In North America, the United States emerges as both the largest and fastest-growing market in the region, leading in both market size and innovation. The region's market is characterized by high adoption rates of feed enzymes across all livestock segments, particularly in poultry and swine production, supported by advanced feed manufacturing infrastructure and strong research and development capabilities.

Europe maintains significant market presence despite mature livestock sectors, with sustainability mandates driving enzyme adoption for environmental compliance objectives. The European Union's methane reduction targets and carbon footprint labeling requirements create regulatory demand for enzyme applications that reduce greenhouse gas emissions while maintaining production efficiency European Commission. North America benefits from established enzyme adoption rates and continued innovation in precision nutrition applications, while South America's expanding livestock exports drive enzyme adoption for feed efficiency optimization in cost-competitive global markets.

List of Companies Covered in this Report:

DSM-Firmenich AG BASF SE Novus International, Inc. (Mitsui and Co., Ltd.) Adisseo SAS (BlueStar Adisseo Co., Ltd.) International Flavors and Fragrances Inc. Cargill Incorporated Archer Daniels Midland Company Elanco Animal Health Incorporated Kerry Group plc Biovet S.A. (Huvepharma EOOD) Alltech, Inc. Chr. Hansen Holding A/S Azelis Holdings S.A. Advanced Enzyme Technologies Ltd. Huvepharma AD

Additional Benefits:

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

Table of Contents:

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