



Feed Antioxidants and Global Market Status

15 April 2024



“ The global feed antioxidants market is estimated to have a size of USD 370 million in 2023, and is also expected to grow at a CAGR of 5% between 2023 and 2030. The growth in the market is expected to be fuelled by factors like rising demand for animal food products such as meat, milk, and eggs, increasing awareness of animal health, increasing compound feed production, and the implementation of innovative animal husbandry practices to improve meat quality.

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By Derya YILDIZ

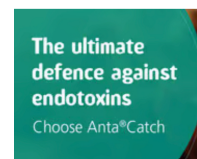
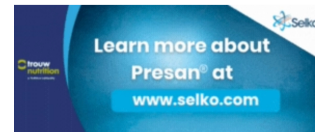
As in metals, oxidation also occurs in feeds and feed components. While oxidation in metals causes corrosion and deterioration, in feed and feed components, it causes rancidity of fats, loss of vitamins, pigments, and amino acids, and a decrease in the biological energy values of feed. If this deterioration continues unabated in the feed, even in a single component, both the feed consumption of the animal may decrease and a significant deficiency in the nutrients taken from the feed may occur. Many researchers have investigated the difficulties caused by uncontrolled oxidation and have established methods to control these oxidation processes. The use of feed antioxidants is one of them. By preventing or delaying the oxidation of lipids, proteins, and other sensitive components in feed, these antioxidants extend the shelf life of the product and guarantee that animals receive the best possible nutrition. Antioxidants in animal nutrition can also reduce oxidative stress by neutralising free radicals and protecting the animal's cells. This can improve the animal's immune system, fertility, and overall health.

Feed antioxidants are preferred more day by day due to the increase in the costs of feed and feed raw materials worldwide and the realisation of the importance of preserving what is available. In addition to this, the hot and humid climate in various parts of the world makes the use of feed antioxidants compulsory in a sense.

According to the researchers, for an antioxidant to be useful in animal nutrition, it must fulfill the following criteria:

- It should be effective in preserving animal and vegetable fats, vitamins, and other feed qualities subject to oxidative degradation,
- It should be non-toxic to humans and farm animals (i.e. chickens, pigs, fish, etc.),
- It should be effective at very low concentrations and,
- Its cost should be low enough.

TYPES OF ANTIOXIDANTS USED FOR ANIMALS



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Antioxidants used for animal feeds and feed ingredients are generally divided into synthetic and natural categories. It is estimated that the use of synthetic antioxidants such as ethoxyquin, BHA (butylated hydroxyanisole), BHT (butylated hydroxytoluene), Propyl Gallate, TBHQ, and phosphoric acid is more common in the animal feed sector. Among the many synthetic antioxidant compounds investigated to date, the most effective one used in animal feeds is ethoxyquin, followed by BHT and BHA. Synthetic feed antioxidants are often formulated as well-defined compounds, exhibit consistent composition, and are used in precise mixtures with other pure substances. These synthetic antioxidants offer remarkable stability, accessibility, long shelf life, and cost efficiency.

However, there is a growing consumer preference away from synthetic antioxidants and towards natural feed antioxidants, including plant extracts and essential oils. This preference is in line with the growing demand for natural and organic animal products. Recognised for their safety and sustainability, natural feed antioxidants are considered an important alternative to their synthetic counterparts, which can pose potential health and environmental hazards. The use of natural feed antioxidants is not only compatible with animal welfare and environmental considerations but also contributes to improved animal health, high meat quality, and an extended shelf life of animal-derived products. It is also emphasised that strict legal regulations often have a positive impact on natural products. This points to a significant potential for carotenoids, tocopherols, botanical extracts, and vitamins.



FEED ANTIOXIDANTS MARKET AND FORECASTS

According to a report by **Market Research Future (MRF)**, the global feed antioxidants market was valued at USD 390 million in 2023. Company experts predict that the market will grow at a compound annual growth rate (CAGR) of 3.8% during the forecast period of 2023–2030, and the total market value will reach USD 490 million by 2030.

According to **Verified Market Research's (VMR)** report, which makes similar forecasts and projections as MRF, the global feed antioxidants market, which was valued at USD 358 million in 2020 (USD 400 million in 2023), will reach USD 483 million in 2028, growing at a CAGR of 3.8% during the forecast period 2021–2028.

Another research company that points to very similar market values to VMR is **Precision Business Insights**. In its report, the company estimates the size of the global feed antioxidant market to be USD 400 million in 2023, growing at a CAGR of 4% between 2024 and 2030. In this case, it can be said that the market will reach a size of approximately USD 526 million in 2030.

The report prepared by **Research and Markets** points to a higher market value. According to the research company's report on the feed antioxidants market, the market size is around USD 410 million in 2022. The report predicts that the market will grow at a CAGR of 5.6% in the coming years and reach USD 568 million in 2028.

The report prepared by **Straits Research** also reveals that the current size of the market is USD 207 million in 2022. Unlike other companies, the research company, which reveals a much lower current market size, is much more assertive about growth expectations. Forecasting that the market will grow at a CAGR of 11.2%, the company predicts that the average size will be USD 539 million by 2031.

Although the current market size and CAGR expectations of the 5 different research companies discussed above vary slightly, their estimates for the future size of the market are quite close. With an average calculation based on the data in these 5 reports, it is possible to estimate that the global feed antioxidants market had a size of USD 370 million in 2023, will grow at a CAGR of 5.7% between 2023 and 2030, and will reach approximately USD 546 million in 2030 with this growth rate.

FACTORS SUPPORTING MARKET DEVELOPMENT

The growth in the global feed antioxidants market is expected to be fuelled by factors such as the rising demand for animal food products such as meat, milk, and eggs, increasing awareness of animal health, increasing compound feed production, and the implementation of innovative animal husbandry practices to improve meat quality.

Analysts point to slow but steady growth in the market despite climate change and the accompanying increased drought, as well



Some Feed Antioxidants

Suppliers in the World:

AB Vista
Adisseo
ADM
Alltech
Barentz International
BASF SE
Bertol Company
BTSA
Caldic
Cargill Feed Solutions

as animal diseases, and predict that this growth will accelerate. Farmers are becoming more aware of the close link between animal health and performance and are paying closer attention to potential problems in feed and feed ingredients that could jeopardise animal health. This supports the use of ingredients in animal feeds that will build disease resistance, increase production efficiency and quality, reduce feed costs, and prevent waste.

FACTORS LIMITING MARKET DEVELOPMENT

The supply of raw materials, which include vitamins, minerals, and plant extracts and are integral to feed antioxidant production, is susceptible to price volatility and availability inconsistencies due to fluctuations in raw material costs. According to the researchers, the resulting fluctuations could be reflected in production costs and product pricing, resulting in a slowdown in the growth rate of the market

Another possible restraint could be due to regulatory restrictions. This is expected to particularly affect synthetic-based antioxidants.

MARKET SITUATION IN TERMS OF ANIMAL SPECIES

Reports reveal that, based on animal type, the poultry segment holds a significant share of the global animal feed antioxidant market and will continue to grow rapidly in the coming years. In poultry farming, feed is one of the key factors affecting production, so reducing feed costs per bird is a priority. Supplementation of feed additives such as enzymes and antioxidants, which improve digestibility and prevent the loss of nutrients, can reduce feed costs. In addition, consumer demand for poultry products is growing rapidly. Analysts believe that this will significantly stimulate the development of the feed antioxidant market.

In the feed antioxidant market, the poultry segment is followed by the cattle segment. In the aquaculture group, there is a strong interest in feed antioxidants. The use of feed antioxidants in aquaculture is increasing due to the growing emphasis on high-quality seafood and sustainable aquaculture. The inclusion of antioxidants in the diet has a positive impact on the growth, survival, and welfare of aquatic organisms. Researchers anticipate that the rapid demand from this group will provide a huge market opportunity for key players operating in the market.

MARKET DEVELOPMENT ON REGIONAL BASIS

The most developed market for feed antioxidants is estimated to be Asia-Pacific. The region is an emerging market that promises much in the future for manufacturers. China is the largest market for feed antioxidants in the region, while India is the fastest-growing market.

Rising disposable income and the increasing demand for protein-rich products such as meat and dairy products make Asia's emerging economies stand out in the market. This growth and development is expected to continue steadily in the coming years. Therefore, both this situation and the increasing number of producers in the region are expected to positively affect the feed antioxidant market. In addition, the hot and humid climate in these regions has the potential to cause the deterioration of animal feeds. This means that the need for feed antioxidants will increase.

In North America, which has an important place in the global feed antioxidant market, both population growth and an increase in poultry feed demand are listed as important factors driving the market. Individuals living in the North American region have an increasing sensitivity towards animal welfare. Therefore, market players in the animal feed industry have to provide highly efficient feed to offer optimum nutrition to animals. As a result, the feed antioxidant market continues to grow in the region.

In the European region, the increasing demand for animal proteins increases the demand for compound feeds. This requirement is also an important factor influencing the expansion of the European market. The expected expansion of the pork production sector in European countries such as Germany, France, and Russia is estimated to increase the accessibility of farm animals and consequently contribute to the growth of the sector in the next seven years. However, animal diseases, the Russia-Ukraine conflict, and war-related raw material and energy crises are significantly disrupting compound feed production in Europe, thereby restricting the feed antioxidant market.

MARKET ENVIRONMENT FOR SUPPLIERS

Reports categorise key developments in the feed antioxidant market into organic and inorganic growth strategies. Accordingly, some companies are focusing on organic growth strategies such as product launches, events, product approvals, and patents, while others are pursuing inorganic growth strategies such as acquisitions, partnerships, and collaborations. These activities have paved the way for market players to expand their businesses and customer bases. Market stakeholders in the feed antioxidants

- Carmin Fine Sciences
- Cargill
- DSM-Firmenich
- EW Nutrition
- FoodSafe Technologies
- IFF (Danisco)
- Impextraco
- Industrial Tecnica Pecuaria
- Kaesler Nutrition
- Kalsec
- Kemin Industries
- Lallemand Animal Nutrition
- MAVIT Stefan Niemeyer
- Naturex
- Novozymes (Novonesis)
- Novus International
- Selko (Nutreco)
- Oxiris Chemical
- Perstorp
- Simfa Labs
- Solvay
- VDH Chem Tech
- Videka
- Vitabland Nederland
- Zhejiang Medicine

market are expected to capture lucrative growth opportunities in the future with the increasing demand for feed antioxidants in the global market.

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