

# **Global Aquafeed Additives Market Size Study and Forecast by Ingredient (Anti-parasitic, Feed Acidifiers, Prebiotics, Essential Oils & Natural Extracts, Palatants, Others), by Application (Carp, Rainbow Trout, Salmon, Crustaceans, Tilapia, Catfish, Sea Bass, Groupers, Others), and Regional Forecasts 2026–2036**

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## **Abstracts**

The Global Aquafeed Additives Market, valued at USD 2.50 billion in 2025, is anticipated to reach USD 3.76 billion by 2036, expanding at a 4.2% CAGR during the forecast period.

Aquafeed additives are functional ingredients added to aquaculture feed formulations that improve health of fish and shrimp, feed efficiency, immunity, growth, and water quality. These additives include anti-parasitic agents, feed acidifiers, prebiotics, essential oils, natural extracts, palatants and other specialty ingredients designed to improve productivity and sustainability in aquaculture operations. The market growth is driven by rising global seafood consumption, expanding aquaculture production, increasing focus on disease prevention and increasing demand for sustainable feed solutions. Aquaculture is contributing an ever increasing share of the world's aquatic food production (FAO, 2024), thus reinforcing the need for advanced nutritional and health-enhancing feed additives. Continuous innovations in functional feed ingredients, precision nutrition, and antibiotic-free aquaculture practices are additionally supporting the market growth.

Global Aquafeed Additives Market: Key Highlights

The global aquafeed additives market was valued at USD 2.50 billion in 2025 and is projected to reach USD 3.76 billion by 2036, growing at a CAGR of 4.2%

during the forecast period.

Asia Pacific dominates the market due to its large aquaculture industry, high seafood production, and growing commercial fish farming activities.

Latin America is expected to post strong growth, driven by salmon and shrimp farming and increased aquaculture investments.

Feed acidifiers represent the largest ingredient segment, due to their function in promoting gut health, feed conversion efficiency, and disease prevention.

Carp has the broadest application segment, owing to its extensive farming in Asia and large production volumes globally.

Growing demand for natural feed additives and functional nutrition solutions is being driven by the increasing uptake of antibiotic-free aquaculture.

Growing investment in sustainable aquaculture and fish health management is further spurring innovations across the market.

Main trends for future product development are precision nutrition, probiotics, phytogetic feed additives and bioactive ingredients.

## Research Scope & Methodology

The report includes the Global Aquafeed Additives Market analysis by ingredient innovation, aquaculture production, species demand, competitive landscape, regulatory framework and regional performance during the forecast period 2025-2036. The study covers additives for aquafeed used in fresh water and marine aquaculture production systems.

The research methodology includes primary interviews with aquafeed manufacturers, ingredient suppliers, aquaculture producers, veterinarians, nutrition specialists, distributors and industry executives. Secondary research comprises verified publications issued by aquaculture organizations, food safety authorities, government agencies, fisheries departments, and international agricultural institutions after 2022. The market estimate is based on the volumes of aquaculture production, seafood consumption, feed manufacturing production, fish health management practices and ingredient utilization rates. Forecast models include macroeconomic indicators, aquaculture expansion, regulatory developments, trends in disease management,

sustainability initiatives and feed technology innovation. Forecast accuracy is ensured by triangulating data from ingredient manufacturers, feed producers, aquaculture farms, distributors and industry experts.

#### Key Market Segments

##### By Ingredient:

Anti-parasitic

Feed Acidifiers

Prebiotics

Essential Oils & Natural Extracts

Palatants

Others

##### By Application:

Carp

Rainbow Trout

Salmon

Crustaceans

Tilapia

Catfish

Sea Bass

Groupers

Others

## Key Market Players

Benchmark Holdings plc (INVE Aquaculture)

BASF SE

Evonik Industries AG

Cargill, Incorporated

Archer Daniels Midland (ADM)

BioMar Group

Alltech

Nutreco N.V. (Skretting)

Kemin Industries, Inc.

Phibro Animal Health Corporation

## Industry Trends

Growing global aquaculture production is increasing the demand for functional feed additives that improve growth performance, disease resistance and feed conversion efficiency.

Feed manufacturers are increasingly using prebiotics, phytogenic ingredients, essential oils and natural extracts to decrease dependence on antibiotics and promote sustainable fish farming.

Growing consumer demand for responsibly farmed seafood has aquaculture producers investing in premium nutrition and fish health management solutions.

Species-specific feed formulations are gaining traction in precision nutrition to optimize nutrient utilization and minimize environmental impact.

Feed acidifiers have also continued to see solid uptake due to their ability to improve gut health, nutrient absorption, pathogen control and overall aquaculture productivity.

More aquatic disease outbreaks are driving use of immune-enhancing feed additives that boost fish health and cut production losses.

Digital aquaculture technologies such as AI-based feeding systems and real-time monitoring of farms are improving feed efficiency and the use of additives.

Manufacturers are improving aquaculture performance by sourcing sustainable ingredients, using fermentation-based additives, and applying biotechnology-driven nutritional solutions.

Regulatory restrictions on the use of antibiotics in aquaculture are driving commercialization of natural alternatives such as probiotics, phytogenics and bioactive compounds.

Feed manufacturers, biotech companies and aquaculture producers are working together to drive the innovation of next generation aquafeed additive formulations.

## Market Determinants

**Expanding Global Aquaculture Production:** The steady growth of commercial aquaculture is a major driver of the aquafeed additives market. Rising global seafood consumption, declining wild fish stocks, and increasing investments in intensive fish farming are creating strong demand for feed additives that improve growth performance, feed efficiency, and animal health. According to the Food and Agriculture Organization (FAO, 2024), aquaculture remains the fastest-growing food production sector globally, accounting for an increasing share of aquatic food production.

**Rising Focus on Fish Health and Disease Prevention:** Disease outbreaks continue to pose significant economic risks to aquaculture operations. Producers are increasingly adopting feed additives such as acidifiers, prebiotics, essential oils, and anti-parasitic ingredients to strengthen immunity, improve gut health, reduce mortality, and enhance overall production efficiency while minimizing

antibiotic dependence.

**Increasing Adoption of Sustainable and Antibiotic-Free Feed Solutions:** Growing regulatory restrictions on antibiotic use and rising consumer demand for sustainably farmed seafood are encouraging feed manufacturers to develop natural and functional feed additives. Plant-based extracts, probiotics, phytogenic compounds, and bioactive ingredients are gaining widespread acceptance as environmentally responsible alternatives that improve fish performance without compromising food safety.

**Technological Advancements in Precision Aquaculture Nutrition:** Continuous innovation in aquaculture nutrition, biotechnology, fermentation technologies, and species-specific feed formulations is improving the effectiveness of aquafeed additives. Precision nutrition strategies enable producers to optimize feed utilization, improve nutrient absorption, reduce feed waste, and enhance farm productivity across diverse aquaculture species.

**High Raw Material Costs and Feed Price Volatility:** The production of aquafeed additives depends on specialized ingredients, fermentation inputs, botanical extracts, and chemical compounds whose prices may fluctuate due to supply chain disruptions, agricultural commodity markets, and energy costs. Rising feed production expenses can affect profit margins for both additive manufacturers and aquaculture producers.

**Regulatory Compliance and Product Approval Challenges:** Aquafeed additives are subject to stringent regulations regarding ingredient safety, efficacy, environmental impact, and animal health. Lengthy product approval procedures, varying international regulatory frameworks, and evolving food safety standards may delay commercialization and increase compliance costs for manufacturers.

## Opportunity Mapping Based on Market Trends

**Growing Demand for Functional and Natural Feed:** aquaculture is creating significant opportunities for natural feed additives including prebiotics, essential oils, phytogenic compounds, and bioactive ingredients. According to the FAO (2024), sustainable aquaculture practices continue gaining importance worldwide, increasing demand for innovative feed solutions that improve productivity while reducing environmental impact.

**Expansion of High-Value Aquaculture Species:** Rapid growth in the farming of salmon, shrimp, sea bass, groupers, and other premium aquatic species is increasing demand for specialized nutritional additives capable of improving survival rates, growth efficiency, disease resistance, and product quality. Manufacturers developing species-specific feed formulations are expected to benefit from expanding commercial aquaculture investments.

**Biotechnology-Driven Feed Innovation:** Advances in microbial fermentation, enzyme technologies, precision nutrition, and biotechnology are enabling the development of next-generation aquafeed additives with enhanced digestibility, immune support, and nutrient bioavailability. These innovations present substantial long-term growth opportunities for ingredient manufacturers.

**Emerging Aquaculture Markets and Sustainable Production:** Increasing aquaculture investments across Asia Pacific, Latin America, Africa, and the Middle East are creating favorable conditions for market expansion. Rising government support for food security, seafood production, and sustainable farming practices is expected to accelerate adoption of advanced aquafeed additives across emerging economies throughout the forecast period.

#### Value-Creating Segments and Growth Pockets

Feed acidifiers dominate the market through improved gut health and feed efficiency. The Ingredient segment is divided into Anti-parasitic, Feed Acidifiers, Prebiotics, Essential Oils & Natural Extracts, Palatants, and Others. The aquafeed additives market is dominated by Feed Acidifiers which accounted for an estimated 31.8% share in 2025. Their leadership is attributed to their ability to improve gut health, increase nutrient absorption, optimize feed conversion ratios, suppress detrimental microorganisms, and support overall aquatic animal performance. Feed acidifiers are used extensively in commercial aquafeed formulations for fish and shrimp production to enhance productivity with less reliance on antibiotics. Increasing aquaculture intensification is driving the demand for nutritional solutions to improve feed utilization and animal health, according to Food and Agriculture Organization (FAO, 2024). The Essential Oils & Natural Extracts segment is projected to grow at the highest CAGR of 5.4% during the forecast period. "Stricter regulations on antibiotic use and a growing preference for natural, sustainable feed ingredients are leading to the widespread adoption of phytogenic additives that boost immunity, digestive health and disease resistance."

Carp remains the largest application while salmon and crustaceans accelerate future growth

According to the Application segment, Carp is the largest market with a market share of 34.6% in 2025. This dominance is bolstered by extensive commercial farming in China, India, Bangladesh, Vietnam and other Asian countries where carp is one of the most commonly cultured species in aquaculture around the world. The large production base provides a steady demand for high-performance aquafeed additives that enhance growth, feed efficiency and survival rates.

The Salmon and Crustaceans segments are expected to register the highest CAGR during the forecast period due to increasing investments in premium aquaculture production, disease management, and precision nutrition. With the growing consumption of salmon and shrimp globally, there is an increasing demand for advanced feed additives that improve health performance, feed conversion efficiency, and product quality.

Functional nutrition creates the strongest long-term value opportunity

The greatest opportunity for long-term value creation is in functional aquaculture nutrition, in which feed additives are increasingly being formulated to help boost immunity, enhance digestive health, reduce environmental impact and optimise production efficiency. The increasing commercialization of probiotic-based nutrition, phytogenic feed additives, enzyme technologies, microbial fermentation products and precision nutrition solutions is expected to revolutionize future aquaculture feeding strategies. The companies investing in developing sustainable ingredients, biotechnology-based innovation and species-specific nutritional formulations are well placed to capitalise on significant long-term growth opportunities across the global aquafeed additives market.

Regional Market Assessment

Asia Pacific dominates the market through large-scale aquaculture production and expanding seafood demand

Asia Pacific had the highest share of the global aquafeed additives market in 2025, estimated to account for 48.2% of the total revenue. The region has large-scale aquaculture production, increasing consumption of seafood, favourable climatic conditions and strong government support for the development of fisheries. China, India, Vietnam, Indonesia, Thailand and Bangladesh continue to be major aquaculture producers, fueling the demand for functional feed additives that enhance feed efficiency, fish health and disease resistance. Asia is the world's largest producer of aquaculture products and thus the world's largest consumer of advanced aquafeed ingredients (Food and Agriculture Organization [FAO], 2024). Ongoing investment in sustainable aquaculture practices and commercial fish farming strengthens the leading position in the regional market.

Europe maintains a strong market position through sustainable aquaculture and regulatory support

Europe is a major regional market, driven by sophisticated aquaculture technologies, strict standards for feed quality and increased focus on sustainable seafood production. Norway, Scotland, Spain and Denmark continue to invest in high-value salmon and trout farming, supporting demand for premium aquafeed additives. "Sustainable aquaculture is a strategic priority to strengthen food security and reduce the environmental impact in the European Union" (European Commission 2024). The region is also witnessing growing adoption of natural feed additives as alternatives to antibiotics.

North America experiences steady growth through premium aquaculture and feed innovation

North America is experiencing steady market growth with increasing investments in aquaculture modernization, fish health management and advanced feed technologies. Commercial production of salmon, trout, catfish and shellfish is growing in the United States and Canada, with a focus on sustainable farming and improved feed efficiency. According to the National Oceanic and Atmospheric Administration (NOAA, 2024), strengthening domestic seafood production and promoting wider use of innovative aquafeed additives are important aspects of sustainable aquaculture development. LAMEA offers emerging opportunities through expanding commercial aquaculture. During the forecast period, LAMEA region is expected to observe significant growth owing to increasing investments by governments in aquaculture, food security and seafood exports. Salmon and shrimp farming in Latin America continues to grow, particularly in Chile, Ecuador and Brazil, generating strong demand for specialized feed additives. The Middle East is investing in new aquaculture systems to increase the production of seafood from within the country, while Africa is starting to scale up commercial fish farming through initiatives by the public and private sectors. FAO (2024) states that the LAMEA region is expected to see an increase in demand for nutritional feed additives, disease management solutions, and sustainable aquaculture technologies due to the growth of aquaculture production in emerging economies.

#### Recent Developments

June 2025: Nutreco N.V. (Skretting) expanded its functional aquafeed portfolio by introducing advanced feed additive solutions focused on improving feed conversion efficiency, fish health, and sustainability across commercial aquaculture operations.

April 2025: Cargill, Incorporated strengthened its aquaculture nutrition business through new precision feed technologies integrating functional additives designed to enhance disease resistance, optimize growth performance, and

reduce environmental impact.

October 2024: Evonik Industries AG expanded its animal nutrition portfolio by advancing specialty feed ingredient technologies that improve nutrient utilization, gut health, and sustainable aquaculture production for multiple fish species.

August 2024: Benchmark Holdings plc (INVE Aquaculture) introduced innovative health management and nutritional solutions incorporating advanced feed additives to improve aquatic animal resilience, productivity, and disease prevention in intensive aquaculture systems.

### Critical Business Questions Addressed

What is the current and projected size of the global aquafeed additives market?

The global aquafeed additives market was valued at USD 2.50 billion in 2025 and is projected to reach USD 3.76 billion by 2036, growing at a CAGR of 4.2% during the forecast period.

Which factors are driving market growth?

The market is driven by expanding global aquaculture production, increasing seafood consumption, growing focus on fish health and disease prevention, rising adoption of sustainable and antibiotic-free feed solutions, and continuous advancements in precision aquaculture nutrition and biotechnology.

Which ingredient segment dominates the market?

Feed Acidifiers hold the largest market share due to their proven ability to improve gut health, enhance nutrient absorption, optimize feed conversion ratios, suppress harmful microorganisms, and improve overall aquaculture productivity across multiple aquatic species.

Which application segments are expected to generate the greatest value?

Carp remains the largest application segment owing to its extensive commercial farming across Asia and high production volumes, while Salmon and Crustaceans are expected to register the fastest growth due to increasing global demand for premium seafood, expansion of commercial aquaculture, and greater adoption of advanced nutritional feed additives.

Which regions offer the strongest future growth opportunities?

Asia Pacific currently leads the global market through large-scale aquaculture production, high seafood consumption, and strong government support for fisheries development. Europe continues to generate significant demand through sustainable salmon farming and stringent feed quality standards, while North America benefits from innovation in aquaculture nutrition. Emerging opportunities are also expanding across

the LAMEA region through growing commercial aquaculture investments, seafood exports, and food security initiatives.

#### Beyond the Forecast

The aquafeed additives market is expected to evolve toward precision aquaculture nutrition, where species-specific feed formulations, functional bioactive ingredients, and data-driven feeding strategies maximize growth performance, disease resistance, and feed efficiency while minimizing environmental impact.

Advancements in biotechnology, microbial fermentation, phytogenic additives, probiotics, enzyme technologies, and AI-enabled aquaculture management systems will accelerate the development of next-generation feed additives that improve nutrient utilization, aquatic animal health, and sustainable seafood production.

As global seafood demand, sustainable aquaculture practices, climate-resilient farming, and regulatory restrictions on antibiotic use continue shaping the industry, manufacturers investing in innovative functional feed ingredients, environmentally responsible nutrition technologies, and precision feeding solutions will be well positioned to achieve sustained long-term growth in the global aquafeed additives market.

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