

Feed Acidulants - A Global Market Overview

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Abstracts

Feed acidulants are organic or inorganic acids, as well as their salt forms, incorporated into animal feed to regulate acidity, enhance nutrient utilization, and support overall animal health and productivity. By lowering the pH of feed and the gastrointestinal tract, these additives improve digestive enzyme activity, promote beneficial gut microflora, and enhance the absorption of essential nutrients, leading to better feed conversion efficiency. In addition, feed acidulants help inhibit the growth of harmful pathogens such as Salmonella and E. coli, reduce spoilage and mold formation during feed storage, and contribute to improved shelf life. Owing to these multifunctional benefits, acidulants are increasingly viewed as effective and natural alternatives to antibiotic growth promoters, with widely used examples including formic, propionic, lactic, and citric acids, along with customized blended formulations.

The market for feed acidulants is being strongly influenced by regulatory pressure to curb antibiotic use in animal production and by rising global demand for meat, dairy, eggs, and aquaculture products. Livestock producers are adopting acidulants to improve gut health, stabilize intestinal microflora, and achieve healthier growth performance while maintaining cost efficiency. Advances such as precision nutrition, digital monitoring tools, and microencapsulation technologies are enabling more targeted and controlled delivery of acids, improving their stability and effectiveness throughout the digestive tract. At the same time, rapid growth in aquaculture, along with increasing emphasis on sustainability, clean-label ingredients, and bio-based solutions, is further expanding adoption. Supported by these trends, the global feed acidulants market, estimated at about US\$3.1 billion in 2025, is expected to grow steadily at a CAGR of 5.6% between 2025 and 2032, reaching roughly US\$4.5 billion by 2032.

Feed Acidulants Regional Market Analysis

Holding an estimated 40.5% share in 2025 and projected to grow at a CAGR of 6.5%

during 2025-2032, Asia-Pacific stands as both the largest and fastest-growing market for feed acidulants worldwide. The region's massive livestock, poultry, and aquaculture base-led by China, India, Indonesia, and Vietnam-drives sustained demand for acidulants to improve gut health, feed efficiency, and product quality, particularly in the rapidly expanding poultry and aquaculture sectors. Rising consumption of meat, dairy, and eggs due to population growth, urbanization, and increasing incomes, along with regulatory moves to restrict antibiotic use in feed, are accelerating adoption of acidulants as natural antimicrobial alternatives. In addition, the strong presence of cost-competitive regional and multinational feed additive producers, supportive government initiatives to modernize livestock farming, favorable manufacturing economics, and the region's role as a major exporter of poultry and aquaculture products are collectively reinforcing Asia-Pacific's leadership in the global feed acidulants market.

Feed Acidulants Market Analysis by Type

Propionic acid represents the most widely used feed acidulant globally, accounting for an estimated 27.8% share in 2025, driven by its strong ability to control mold, fungi, and pathogenic bacteria such as Salmonella and E. coli, particularly in poultry and swine feeds. Its broad antimicrobial spectrum supports feed hygiene and safety while effectively extending shelf life under varied storage conditions, making it highly suitable for large commercial feed operations, further reinforced by its GRAS status and regulatory approvals. Meanwhile, formic acid is projected to be the fastest-growing feed acidulant, with a forecast CAGR of about 7% during 2025-2032, owing to its high antimicrobial efficacy at lower dosages, benefits in lowering feed and gut pH to enhance digestibility and nutrient utilization, and its growing role as a natural alternative to restricted antibiotic use. The increasing availability of buffered and encapsulated formic acid formulations, which improve handling safety and reduce corrosiveness, is also accelerating adoption across modern, high-density livestock production systems.

Feed Acidulants Market Analysis by Compound

Blended feed acidulants dominate the global market with an estimated 62.7% share in 2025 and are also projected to be the fastest-growing segment, expanding at a forecast CAGR of about 6% during 2025-2032. These formulations combine multiple organic acids such as formic, propionic, citric, and lactic, delivering synergistic antimicrobial effects that provide broader and more effective pathogen control across the gut than single-acid products. By optimizing intestinal pH more consistently, blended acidulants enhance nutrient absorption, improve feed conversion ratios, and support higher weight gains, making them especially attractive as antibiotic alternatives in intensive livestock

systems. Their proven effectiveness in poultry, along with versatility across swine, ruminants, and aquaculture, combined with advances in microencapsulation and controlled-release technologies that improve stability and targeted delivery, is accelerating adoption and reinforcing their leadership over single-acid solutions.

Feed Acidulants Market Analysis by Form

Dry feed acidulants dominate the global market with an estimated 69.2% share in 2025, driven by their ease of handling, storage, and transportation, longer shelf life, and high stability compared to liquid forms. Their cost efficiency and seamless integration into conventional feed manufacturing processes—such as pelleted, mash, and crumbled feeds—have made them the preferred choice for established compound feed mills, supported by strong compatibility with existing infrastructure and large-scale production capabilities. Meanwhile, liquid feed acidulants are expected to grow faster, registering a projected CAGR of 5.9% during 2025-2032, owing to advantages such as precise dosing, rapid solubility, uniform distribution, and quick pH control, with rising adoption in precision nutrition, automated feeding systems, and drinking-water acidification, particularly in modern intensive farming operations and emerging markets.

Feed Acidulants Market Analysis by Function

By function, pH control represents the largest application of feed acidulants, accounting for an estimated 54.5% share of the global market in 2025, as maintaining optimal digestive pH is fundamental to improving nutrient digestion, suppressing pathogenic bacteria, and supporting overall animal performance across poultry, swine, and aquaculture systems. While pH regulation underpins widespread adoption, feed efficiency enhancement is projected to be the fastest-growing functional segment, registering a forecast CAGR of 6.3% during 2025-2032, driven by rising feed costs, sustainability goals, and increasing emphasis on maximizing feed conversion ratios and nutrient utilization through advanced formulations and precision nutrition strategies.

Feed Acidulants Market Analysis by Animal Type

Poultry dominates global feed acidulants demand with an estimated 41.1% share in 2025, driven by the large scale and high intensity of poultry production worldwide and rising consumption of chicken meat and eggs as affordable, high-quality protein sources. In antibiotic-free and high-density production systems, acidulants are widely relied upon to support gut health, improve nutrient absorption, and control pathogens, making them essential for maintaining bird performance and product quality. Meanwhile,

aquaculture is projected to be the fastest-growing end-use segment, recording a forecast CAGR of 6.8%, supported by increasing global demand for fish and seafood as healthy, protein-rich foods and by the role of acidulants in enhancing digestibility, protein utilization, and disease resistance in fish and shrimp feed formulations.

Feed Acidulants Market Report Scope

This global report on Feed Acidulants analyzes the market based on Type, Compound, Form, Function and Animal Type for the period 2022-2032 with forecasts from 2025 to 2032 in terms of value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of how and where the market is progressing.

Key Metrics

Historical Period: 2022-2024

Base Year: 2025

Forecast Period: 2025-2032

Units: Value market in US\$

Companies Mentioned: 20+

Feed Acidulants Market by Geographic Region

North America (United States, Canada and Mexico)

Europe (France, Germany, Italy, Russia, Spain, United Kingdom and Rest of Europe)

Asia-Pacific (China, India, Japan, South Korea and Rest of Asia-Pacific)

South America (Argentina, Brazil and Rest of South America)

Rest of World

Feed Acidulants Market by Type

Citric Acid

Formic Acid

Lactic Acid

Propionic Acid

Sorbic Acid

Other Types (Primarily including Acetic Acid, Fumaric Acid, Malic Acid & Phosphoric Acid)

Feed Acidulants Market by Compound

Blended

Single

Feed Acidulants Market by Form

Dry Feed

Liquid Feed

Feed Acidulants Market by Function

Feed Efficiency

Flavor Enhancement

pH Control

Feed Acidulants Market by Animal Type

Aquaculture

Equine

Pets

Poultry

Ruminants

Swine

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Sorbic Acid

Other Types (Primarily including Acetic Acid, Fumaric Acid, Malic Acid & Phosphoric Acid)

Feed Acidulants Compound

Blended

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Feed Acidulants Form

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Feed Acidulants Function

Feed Efficiency

Flavor Enhancement

pH Control

Feed Acidulants Animal Type

Aquaculture

Equine

Pets

Poultry

Ruminants

Swine

2. KEY MARKET TRENDS

3. KEY MARKET PLAYERS

ADDCON GmbH

Adisseo
Anpario plc
BASF SE
Biomim Holding GmbH
Cargill, Incorporated
Chr Hansen Holding A/S
Corbion NV
dsm-firmenich
Eastman Chemical Co
Evonik Industries AG
Impextraco NV
Jefo Nutrition, Inc.
Kemin Industries, Inc.
Kemira Oyj
Novus International, Inc.
Nutrex NV
Pancosma SA
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Tate & Lyle PLC
Trouw Nutrition
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