

Aquafeed Market by Species (Fish, Crustaceans, and Mollusks), Ingredient (Soybean, Corn, Fishmeal, Fish Oil, and Additives), Lifecycle (Starter Feed, Grower Feed, Finisher Feed, and Brooder Feed), Form, Additive and Region - Global Forecast to 2028

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Abstracts

According to MarketsandMarkets, the aquafeed market is projected to reach USD 88.0 billion by 2028 from 61.8 billion by 2023, at a CAGR of 7.3% during the forecast period in terms of value. Growth in the aquafeed market has been aided by rising worldwide seafood consumption and rising consumer awareness of the quality of seafood products. Additionally, it is anticipated that an increase in per capita income, particularly in emerging countries, will support the expansion of the aquaculture and aquafeed industries. Long-term market expansion is anticipated to be constrained by rising raw material costs because the bulk of high-quality feed is made with fish meal and fish oil.

'By ingredients, fish meal segment is projected at a fastest during the forecast period.'

Fishmeal is prepared by using wild-caught and small marine fish, which contain a high percentage of bones and oil. It is unsuitable for human consumption. It typically contains 60% to 72% protein; 5% to 12% fat; and a high content of EPA and DHA fatty acids more commonly referred to as Omega-3, vitamins, and minerals. The use of fishmeal in the diet of aquatic animals improves the overall efficiency of the feed and improves their growth, palatability, nutrition uptake, digestion, and absorption, thus driving the demand for fish meal in aquafeed market.

'By form, the dry segment is projected fastest during the forecast period.'

The feed for fish is most commonly available in the form of pellets or granules, and

usually contains moisture of approximately 7%–13%. Most aquafeed manufacturers adopt the use of the dry form of feed due to its free-flowing structure and ability to provide consistency. Dry feed has superior feed conversion ratios, which means that aquatic animals use the nutrients in the diet more effectively. As a result, the aquaculture species may perform better overall and grow at higher rates while spending less on feed. Companies are also coming up with new product launches, such as, in April 2023, MiAlgae, Scottish biotech company, launched NutrAlgae, an omega 3 powder which is a nutritious feed ingredient. It can be used as fish feed and pet food ingredient. The product has a high concentration of DHA and other oils. This is allowing new ingredient-based products thus driving the aquafeed market.

'By species, the fish segment is projected fastest during the forecast period.'

The oldest and most popular type of aquaculture, or cultivation of aquatic animals, is fish farming. Fish-focused aquafeed is in high demand due to the vast farming of fish species like salmon, tilapia, carp, and catfish over a long period of time. In addition, fish are highly prized for the nutrients they contain, particularly the omega-3 fatty acids and premium protein. Due to this, there is a substantial market demand for farmed fish for both home and international use. Aquaculture producers depend on nutrient-balanced and species-specific aquafeed formulations to promote the development, health, and quality of farmed fish in order to meet this demand.

“By lifecycle, grower segment is projected in fastest during the forecast period.”

Proteins are an important requirement for the growth of fish. The protein requirements are generally higher for fish, which are smaller in size and are at the early stages of life. As the fish grows larger, the protein requirements are usually lower. For optimum growth and development, small fish, such as fingerlings or juvenile fish, have nutritional needs. Grower feeds are designed to suit the nutritional requirements of small fish by delivering a well-balanced mix of proteins, carbs, fats, vitamins, and minerals. These feeds are made to promote the juvenile fish's skeletal development, overall wellbeing, and healthy growth. The nutritional requirements of small fish alter as they mature and develop to bigger sizes. By offering proper nutrient profile for their intermediate growth stages, grower feeds assist in bridging the nutritional gap between starter feeds and adult feeds. They act as a transitional diet that gets the fish ready for their eventual switch to adult feeds, which have various nutrient profiles.

“By additives, amino acids segment is projected in fastest during the forecast period.”

Amino acids are important in animal nutrition and are the building blocks of protein, which play an essential role in the growth, production, and overall maintenance of aquatic animal health. They provide the energy required for the growth of muscles and bones for muscle movement, digestion, and blood circulation. Amino acids are essential for the effective utilization of other nutrients, including fats and carbs. Lack of certain amino acids in the diet could interfere with the metabolism and absorption of nutrients, thereby reducing feed efficiency and nutrient utilization. The optimization of nutrient utilization and the improvement of feed conversion into biomass are both aided by the supplementation of the lacking amino acids. Methionine, lysine, tryptophan, and threonine are the four types of amino acids widely used in animal feed. Tryptophan regulates the immune system, maintains health, increases appetite, and improves the growth rate and efficiency of feed.

“Asia Pacific will significantly contribute towards market growth during the forecast period.”

The Asia Pacific region includes countries such as China, Indonesia, Vietnam, Thailand, India, and Rest of Asia Pacific. The region also accounted for the largest share of 63.5% in the global aquafeed market in 2022. According to a report published by FAO in 2022, Asia continued to dominate the global aquaculture production, with the production share of 70% in 2020, which is followed by Americas accounting 12% and then Europe having the share of 10%, and the rest of the aquaculture production is contributed by Africa and Oceania. China remained the major producer with a share of 35% of the total output. The expansion in the global aquaculture is also attributed to the large fishing fleet that Asian countries have, which is about two-thirds of the global total. Therefore, the expansion of the aquaculture sector in Asia Pacific drives the demand for aquafeed. The region has a significant share in global aquaculture production, and as the industry grows, there is a greater need for high-quality and sustainable aquafeed, which is anticipated to drive the aquafeed market in the region.

Break-up of Primaries:

By Company Type: Tier1-30%, Tier 2-30%, Tier 3- 40%

By Designation: CXOs-31%, Managers – 24%, and Executives- 45%

By Region: North America - 35%, Europe - 30%, Asia Pacific – 20%, South America-10%, RoW – 5%,

Leading players profiled in this report:

ADM (US)

Cargill, Incorporated (US)

Ridley Corporation Limited (Australia)

Nutreco (Netherlands)

Alltech (US)

Purina Animal Nutrition (US)

Adisseo (Belgium)

Aller Aqua A/S (Denmark)

Biomin (Austria)

Biomar (Denmark)

Norel Animal Nutrition (Spain)

Avanti Feeds Limited (India)

De Heus Animal Nutrition B.V (Netherlands)

Novus International (US)

Biostadt India Limited (India)

The study includes an in-depth competitive analysis of these key players in the Aquafeed market with their company profiles, recent developments, and key market strategies.

Research Coverage:

The report segments the aquafeed market based on species, additives, form, lifecycle, ingredients and regions. In terms of insights, this report has focused on various levels of analyses—the competitive landscape, end-use analysis, and company profiles, which together comprise and discuss views on the emerging & high-growth segments of the global aquafeed market, high-growth regions, countries, government initiatives, drivers, restraints, opportunities, and challenges.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall aquafeed market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and to plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Growth in aquaculture industry), restraints (Lack of awareness about modern feeding methods in developing countries), opportunities (Growth in support from governments), and challenges (Growth in environmental and human health concerns) influencing the growth of the aquafeed market.

Product Development/Innovation: Detailed insights on research & development activities, and new product & service launches in the aquafeed market.

Market Development: Comprehensive information about lucrative markets – the report analyses the aquafeed market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the aquafeed market.

Competitive Assessment: In-depth assessment of market shares, growth strategies and product offerings of leading players include ADM (US), Cargill, Incorporated (US), Ridley Corporation Limited (Australia), Nutreco (Netherlands), and Alltech (US). The report also helps stakeholders understand the aquafeed market and provides them with information on key market drivers,

restraints, challenges, and opportunities.

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*Details on Business overview, Products/Solutions/Services offered, Recent developments & MnM View might not be captured in case of unlisted companies.

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