

Animal Feed Dietary Fiber Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028F Segmented By Type (Corn, Cereals, Grains, Pine, Potato, Spruce, Others), By Solubility (Soluble, Insoluble), By Application (Pet Food, Compound Feed, Specialty Feed), By Region, Competition

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Abstracts

The Global Animal Feed Dietary Fiber Market was valued at USD 6.2 billion in 2022 and is projected to experience robust growth in the forecast period, with a CAGR of 7.3% through 2028. Dietary fiber plays a vital role in promoting digestive well-being in animals when incorporated into their feed. It serves as a pivotal component that fosters intestinal health and reduces the likelihood of contracting various ailments. The increasing awareness among customers regarding the significance of animal health is driving the demand for high-quality dietary fiber in animal feed. Moreover, the prevailing trend of humanizing pets is fueling the need for premium pet food enriched with dietary fibers, thereby ensuring the maintenance of their digestive health.

The growing understanding among farmers and livestock producers regarding the benefits of utilizing top-notch feed to enhance the production and quality of meat and dairy products is a key factor driving the demand for animal feed dietary fiber. The requirement for dietary fiber in animal feed arises from the rapid expansion of the meat and dairy industries, as it contributes to the improvement of animal well-being and productivity.

Key Market Drivers:

Pet Adoption and Expenditure on Food Is Rising:

To improve health, dietary fibers are frequently used in pet food. These fibers serve to increase bulk and absorb excess water, thereby enhancing bowel regularity. The pet food sector has expanded in line with the rate of pet adoption, which is further creating opportunities for market expansion. For instance, the pet food market is growing at a rate of 2.8% in the European region, according to the European Pet Food Market Federation (FEDIAF), with over 88 million home pet owners. Additionally, the American Pet Products Association estimates that American families spent a total of USD 103.6 billion on their pets in 2020, with approximately 40.5% allocated towards food. The market for animal feed dietary fibers is expanding as a result of the rising pet adoption and pet food spending.

Growing Consumer Awareness of Animal Welfare and Health:

There is a growing consumer awareness of the significance of animal welfare and health. This awareness is driving the demand for animal feed products that support digestive health and overall well-being. Dietary fiber is recognized as an essential component that supports animal intestinal health.

For example, the pet food and treats market in the United States was estimated at USD 42 billion in 2020 and USD 44.1 billion in 2021, representing a 5% increase. This growth can be attributed to rising disposable incomes and changing dietary preferences, leading to a higher demand for high-quality animal-based products such as meat, eggs, and dairy. Livestock farmers are now focusing on providing a balanced, nutrient-rich diet with high dietary fiber to improve the quality of animal-derived products, which has led to an increased demand for animal feed dietary fiber worldwide.

There is also a growing need for dietary fibers in animal feed due to stricter regulations related to labeling, nutritional values, and other factors. The European Pet Food Industry Federation (FEDIAF) has recognized dietary fiber-rich potatoes as a significant protein source and has included them in the required food protein content. Additionally, the Association of American Feed Control Officials (AAFCO) now mandates the labeling of crude fiber proportion in animal feed. The AAFCO sets the crude fiber restriction at 4% for nursing dairy cows, 20% for breeding ewes, and the same percentage limit for other livestock. These government regulations are driving the demand for dietary fibers in animal feed and contributing to market growth.

The expanding livestock sector, driven by a growing global population, is also fueling

the demand for animal-based protein. To meet this demand, cattle farmers are incorporating dietary fiber into animal feed to ensure optimal growth and productivity by promoting digestive health and enhancing nutrient absorption.

Furthermore, there is a growing awareness among farmers and livestock producers about the benefits of using high-quality feed to improve the production and quality of meat and dairy products. This awareness, coupled with the rapidly growing meat and dairy sectors, is driving the demand for dietary fiber in animal feed as it enhances the health and productivity of animals.

The growing prevalence of animal diseases and mounting concerns regarding antibiotic use in animal feed are driving factors behind the increasing demand for natural feed additives, including dietary fiber. These additives offer a safe and effective means of improving animal health and welfare, thus gaining popularity among livestock farmers.

Another contributing factor to the rise in demand for dietary fiber in animal feed is the increasing desire for organic and non-Genetically Modified Organisms (GMO) alternatives. As awareness grows regarding the detrimental impact of conventional farming practices on the environment and human health, the demand for organic and non-GMO animal feed is on the rise. Notably, a significant portion of GMO soy is used for soybean oil and animal feed, predominantly in the poultry and livestock sectors.

The livestock industry has been under scrutiny due to its environmental footprint, particularly in terms of greenhouse gas emissions, land use, and water consumption. Incorporating high-fiber feed ingredients, such as specific agricultural by-products and fibrous materials, presents opportunities for utilizing non-food biomass and reducing waste. Utilizing animal feed dietary fiber from sustainable sources aligns with the objectives of environmental sustainability and resource efficiency.

According to the Food and Agricultural Organization of the United Nations, cattle production is responsible for approximately 15% of global greenhouse gas emissions. Implementing dietary fiber can potentially reduce these emissions by up to 50% when provided to animals. Strategic feed management decisions play a crucial role in controlling nitrogen (N) and greenhouse gas (GHG) emissions in livestock agricultural systems. Not only does dietary intervention enhance production efficiency, but it also positively impacts the environment by mitigating CH₄ emissions from ruminant activities. Consequently, the global animal feed dietary fiber market is expected to witness increased demand in the coming years.

Increasing Demand for Animal Protein

The rising global population and increasing consumer preference for animal-based protein sources, such as meat, milk, and eggs, have led to a growing demand for animal dietary feed to support livestock production. Urbanization is associated with changes in dietary habits, with a shift towards a higher consumption of animal-based protein. People in urban areas tend to consume more meat, dairy, and other animal-derived products, driving the demand for animal feed. The expansion of the middle-class population in emerging economies has led to increased purchasing power and a preference for protein-rich diets, further boosting the demand for animal-based products and, consequently, animal feed. As economies grow and incomes rise, dietary patterns tend to shift towards a greater consumption of animal proteins, driving the demand for livestock production and feed. All these factors are expected to boost the global animal feed dietary fiber market in the forecast period.

Key Market Challenges

Fluctuating Prices of Raw Materials

Fluctuating raw material prices directly influence the cost of producing animal feed. When the prices of dietary fiber sources increase, feed manufacturers may face higher production costs, impacting their profit margins. Rapid and unpredictable changes in raw material prices can lead to market instability and uncertainty for both feed producers and buyers. Sudden fluctuations in raw material prices can create supply chain challenges. Feed manufacturers may face difficulties in securing a consistent supply of affordable dietary fiber sources, impacting their ability to meet market demand. Procuring a sufficient and consistent supply of premium dietary fiber raw materials can pose a challenge for manufacturers. The accessibility of specific fiber sources may be constrained, particularly in certain regions, thus affecting production capacity and formulation options for animal feed dietary fiber products. The animal feed dietary fiber market is subject to the price fluctuations of raw materials utilized in feed production. Variations in the costs of grains, fruits, vegetables, and other sources of dietary fiber can have an impact on the overall expenses of animal feed. The volatility in raw material prices presents a challenge for market participants, as it can influence profit margins and pricing strategies.

Regulatory Challenges

The animal feed industry is governed by a range of regulations and guidelines to ensure

the safety and quality of feed products. Compliance with these regulations can present challenges for market players, particularly in the incorporation of new dietary fiber ingredients or making health claims related to their products. Stringent regulatory requirements may impede innovation and product development in the animal feed dietary fiber market. Despite growing awareness of animal health and welfare, some livestock farmers and pet owners may still lack awareness and understanding of the significance of dietary fiber in animal feed. Education and outreach programs are vital to promote the benefits of dietary fiber and encourage its adoption in animal feed.

Key Market Trends

Prebiotics and Probiotics Use in Diet

The use of prebiotics and probiotics in animal feed is gaining momentum. These functional additives promote gut health, enhance nutrient absorption, and boost the overall well-being of livestock, leading to improved growth and productivity. Advances in technology and data analytics are enabling precision nutrition in animal feed. Feed formulations are becoming more tailored to the specific needs and characteristics of individual animals, allowing for better performance and reduced environmental impact. With increasing awareness of environmental sustainability and concerns about the environmental impact of meat production, there is a growing interest in plant-based protein sources for animal feed. Ingredients like soybean meal, pea protein, and other plant-based proteins are gaining popularity as alternatives to traditional animal-based proteins. Research and innovation in the feed industry are leading to the identification and use of novel alternative feed ingredients. Insect protein, single-cell protein, algae, and other non-conventional sources are being explored for their potential as sustainable and nutritious feed options which is increasing the demand of animal feed dietary fiber.

Feed Efficiency and Reduction of Environmental Impact

Feed manufacturers are continuously optimizing feed formulations to provide a balanced and highly digestible diet for livestock and aquaculture species. By ensuring that the feed meets the specific nutritional requirements of animals, feed conversion rates can be improved, leading to better growth and productivity with less feed waste. Advances in technology and data analytics have enabled precision feeding. Sensors, IoT devices, and automated feeding systems are used to monitor animals' feed intake and behavior in real-time. This information helps adjust feed rations precisely, reducing overfeeding and waste.

Segmental Insights

Application Type Insights

Based on application, the global animal feed dietary fibers market is categorized into pet food, compound feed, and specialty feed. The compound feed segment constituted the largest share of the global market in 2018, both in terms of revenue and volume. Compound feed is projected to experience strong demand from key buyers in the animal feed dietary fibers market, such as contract growers and animal farmers. The pet food segment is expected to grow at a faster pace compared to other segments during the forecast period. The global population of companion animals or pets is anticipated to expand significantly in the coming years. Pet owners are increasingly focusing on adding nutritional value to their pets' diet, which is driving the demand for dietary fibers in pet food. The global demand for pet food is expected to rise, driven by the growth in per capita income. The transition in pet diets from table scraps to nutritious feed is anticipated to have a positive impact on the demand for animal feed dietary fibers in the forecast period.

Type Insights

Based on type, the market is segmented into corn, cereals, grains, pine, potato, spruce, and others. Corn holds the largest share in the market for animal feed dietary fibers. The inclusion of corn-derived dietary fiber can help reduce cholesterol levels and improve animal digestive health. When combined with other dietary ingredients and supplements, corn fibers offer multiple advantages in animal feed, leading to increased poultry egg production, improved meat quality in other animals, and enhanced milk production in cows and lambs. Consequently, the utilization of corn in animal feed dietary fibers is on the rise, driven by these essential properties.

Regional Insights

North America holds a significant share in the global Animal Feed Dietary Fibers Market due to the rising pet adoption and increasing regulatory norms related to animal feed's nutritional value, quality, and labeling. The Asia Pacific market is also experiencing rapid growth, driven by the expanding pet population and a well-established compound feed production industry.

The Asia Pacific region is projected to witness the highest growth in the animal feed dietary fiber market during the forecast period. This growth can be attributed to the

region's strong economic progress and growing demand for animal protein, resulting in an increased need for animal feed. The increasing populations and disposable incomes in countries like China, India, and Indonesia contribute to this trend. Additionally, the presence of major feed producers such as Charoen Pokphand Group, Cargill, and New Hope Group, actively fostering market expansion, further strengthens the region's growth. Moreover, these companies are expanding their operations into other Asian countries, facilitating market expansion in the region. Furthermore, the growing consumer awareness about the benefits of animal nutrition and the inclusion of dietary fibers in animal feed are expected to drive market growth in the region.

Key Market Players

Roquette Frères S.A.

Archer-Daniels-Midland Company

Cargill Inc.

Tate & Lyle PLC

Ingredion Incorporated

J. RETTENMAIER & SÖHNE GmbH + Co KG

Associated British Foods PLC

BENEÓ-Orafti SA

Kerry Inc.

Agromed GmbH

Report Scope:

In this report, the Global Animal Feed Dietary Fiber Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Animal Feed Dietary Fiber Market, By Type:

- Corn
- Cereals
- Grains
- Pine
- Potato
- Spruce
- Others

Animal Feed Dietary Fiber Market, By Solubility:

- Soluble
- Insoluble

Animal Feed Dietary Fiber Market, By Application:

- Pet Food
- Compound Feed
- Specialty Feed

Animal Feed Dietary Fiber Market, By Region:

- North America
 - United States
 - Canada
 - Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Animal Feed Dietary Fiber Market.

Available Customizations:

Global Animal Feed Dietary Fiber market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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