

Aquafeed Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Ingredient (Soybean, Fish Meal, Corn, Fish Oil, Additives, Others), By Additives (Amino Acids, Vitamins & Minerals, Prebiotics & Probiotics, Enzymes, Antibiotics, Other), By Species (Fish, Crustaceans, Molluscs, Other), By Form (Dry Form, Wet Form, Moist Form), By Lifecycle (Grower feed, Finisher feed, Starter feed, Brooder feed), By Region and Competition

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Abstracts

Global Aquafeed Market has valued at USD 60.75 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.14% through 2028. Aquafeed, composed of a diverse array of ingredients, is utilized as nutrition for aquatic animals, commonly consisting of fish, crustaceans, and mollusks. Its purpose is to fulfill their nutritional requirements and facilitate normal physiological functions, encompassing the maintenance of a robust natural immune system, reproduction, and growth. With a limited shelf life, aquafeed necessitates meticulous handling to ensure its efficacy.

This specialized food is meticulously prepared from a combination of fish and plant-based raw materials. It is tailor-made to deliver essential nutrients such as proteins, fats, vitamins, oils, and minerals, crucial for optimal growth and overall well-being. The composition of aquafeed varies according to the species being raised and the specific life stage of the animal. Not only does it mitigate the effects of stress and bolster

immunity, but it also enhances disease resistance. Aquafeed can be administered in various forms, including pellets, flakes, or granules.

Key Market Drivers

Increased Consumption of Seafood

As the world's appetite for seafood continues to grow, the demand for aquafeed is expected to surge concurrently. Seafood, a crucial source of nutrition for billions of people worldwide, is increasingly supplied by aquaculture - the farming of aquatic organisms. As this sector expands, so too does the need for aquafeed, the specialized food provided to the organisms being farmed. Aquafeed is a critical component of the aquaculture industry, providing the essential nutrients needed for the growth and health of the aquatic organisms. The global rise in seafood consumption, driven by factors such as population growth, increased awareness of the health benefits of seafood, and changing dietary preferences, is thus directly influencing aquafeed demand. Furthermore, as wild fish stocks deplete due to overfishing, aquaculture and, by extension, aquafeed, become even more pivotal in meeting the escalating seafood demand. Consequently, the increase in seafood consumption is prompting a global surge in the aquafeed market, a trend expected to continue as the world strives to satisfy its seafood cravings sustainably.

Growing Aquaculture Industry

The global aquaculture industry is poised to witness considerable growth, which in turn, will fuel an upsurge in the demand for aquafeed. Aquafeed, the customized diet for aquatic livestock, plays a pivotal role in enhancing the productivity and health of the farmed species. As the aquaculture industry evolves, so too does the emphasis on efficient and nutritious feed. The industry's expansion is primarily driven by the increased consumption of seafood due to its nutritional benefits and the steady depletion of natural fisheries. Major economies like China, India, and regions such as Southeast Asia and Latin America are seeing significant advancements in aquaculture practices, further propelling the demand for aquafeed. Moreover, technological advancements in feed formulation and processing are set to boost the aquafeed market. Sustainability is also a prominent factor, with eco-friendly and resource-efficient aquafeed gaining precedence in the global market. Hence, the growth trajectory of the aquaculture industry directly impacts the demand for high-quality aquafeed, making it an integral part of the sector's future advancement.

Advancements in Aquafeed Manufacturing Processes

Advancements in aquafeed manufacturing processes promise to significantly boost global demand for aquafeed. These advancements primarily focus on improving nutrient efficiency, enhancing fish health, and reducing environmental impact. For instance, the incorporation of precision feeding technologies allows more accurate determination of nutrient requirements for different species of aquaculture organisms at various stages of their life cycle. This ensures optimal growth rates while minimizing waste, consequently reducing operational costs for fish farmers and promoting environmentally sustainable practices. Additionally, the use of alternative protein sources, such as insects and algae, is being explored to relieve the pressure on wild fish stocks. These novel feeds are not only more sustainable but also offer enhanced nutritional profiles, contributing to better fish health and product quality. Moreover, advancements in feed formulation and processing techniques, such as extrusion and pelleting, allow for more efficient feed utilization, further driving demand. As fish farming continues to expand as a solution for meeting the ever-increasing global demand for seafood, these advancements in aquafeed manufacturing processes are expected to play a crucial role, thereby leading to increased demand for aquafeed around the world.

Increasing Demand for Fish Oil in Human Diets

The burgeoning demand for fish oil in human diets is poised to significantly elevate the global demand for aquafeed. Fish oil, well-regarded for its high Omega-3 fatty acid content, is increasingly being incorporated into human diets owing to its numerous health benefits, including improved heart health, cognitive function, and inflammatory response. Consequentially, this surge in consumption patterns is directly influencing the need for more prolific and efficient aquaculture practices. Aquafeed, the cornerstone of these practices, is thus experiencing a parallel escalation in demand. Fish oil's high nutritional value makes it a key ingredient in aquafeed formulations, ensuring the health and growth of farmed fish. As the human appetite for fish oil grows, so will the necessity for high-quality aquafeed. Moreover, advancements in aquafeed research are enabling the production of feed that more efficiently utilizes fish oil, maximizing the yield of Omega-3 rich fish. Therefore, the increasing inclusion of fish oil in human diets translates into an amplified need for advanced aquafeed, thereby bolstering its global demand.

Key Market Challenges

High-Cost Volatility Associated with The Raw Materials

The global aquafeed industry has been grappling with the high cost volatility associated with raw materials, a factor that can significantly decrease demand. The primary ingredients in aquafeed, such as soybean meal, fishmeal, and fish oil, are subject to intense price fluctuations due to environmental changes, supply chain disruptions, and geopolitical factors. These volatilities increase production costs, inevitably leading to higher prices for the end product. As aquafeed becomes more expensive, fish farmers, particularly those operating on small scales, may struggle to afford it, potentially leading to decreased production or a shift towards cheaper, less nutritious alternatives. The increased cost of aquafeed also translates into higher market prices for farmed fish, which can reduce consumer demand. Moreover, in emerging economies where price sensitivity is high, these price hikes can severely impact aquaculture development, further reducing global demand for aquafeed. An unstable raw material market not only threatens the profitability and sustainability of the aquafeed industry but also impacts the entire aquaculture value chain. Thus, managing the high-cost volatility of raw materials is crucial for stabilizing and increasing the global demand for aquafeed.

Disease Outbreak in Aquaculture Farms

The outbreak of disease in aquaculture farms worldwide poses a significant threat to the demand for aquafeed. As infections spread across aquatic populations, farmers are forced to cull large numbers of fish to prevent further disease transmission. This reduces the overall population of farmed fish, consequently leading to a reduced demand for aquafeed. Additionally, these disease outbreaks often incite fear among consumers, leading to decreased consumption of seafood. This public reaction further suppresses the need for fish farming and, by extension, the demand for aquafeed. The global aquafeed market is intricately tied to the health and productivity of aquaculture farms. Thus, regular disease outbreaks can lead to volatility in aquafeed demand, affecting manufacturers and influencing global market trends. It is crucial for stakeholders in the aquaculture sector to invest in robust disease prevention and control measures to assure consistent demand for aquafeed, and to maintain overall market stability.

Key Market Trends

Rise in Development of High-Quality Aquafeeds

The global aquafeed market is projected to see significant growth, driven largely by advancements in the development of high-quality feeds. The ever-increasing global

demand for seafood, enhanced by the rise in aquaculture practices, necessitates the provision of nutritionally balanced feeds to ensure healthy and robust aquaculture stock. High-quality aquafeeds not only optimize growth rates but also boost immunity, reducing stock losses and improving overall yield.

These aquafeeds, fortified with essential nutrients, bioactive compounds, and probiotics, are thus integral to cost-effective and sustainable aquaculture. As countries continue to recognize the importance of aquaculture in securing their food supply, investment in research and development of sophisticated aquafeeds is anticipated to increase. This, in turn, will drive the global demand for aquafeed. Furthermore, the rise in environmentally conscious aquaculture practices necessitates feeds that minimize waste and nutrient pollution, another factor propelling the demand for high-quality aquafeeds.

Therefore, the development and adoption of these advanced aquafeeds are an essential step in meeting the growing global demand for sustainably produced and nutritionally rich seafood. The market's future trajectory thus points towards a substantial rise in demand, fueled by the ongoing advancements in aquafeed formulation and production.

Government Initiatives Promoting Aquaculture

Government initiatives promoting aquaculture are set to significantly bolster the global demand for aquafeed. With the rising global population and the consequent surge in demand for protein-rich food, sustainable aquaculture has been identified as a key solution. Governments across the world are actively engaging in creating favorable policies, offering subsidies, and promoting research and development in aquaculture practices. This, in turn, encourages farmers to transition from traditional fishing methods to more productive and sustainable aquaculture systems, which invariably necessitates the use of aquafeed. Aquafeed, being an integral part of the aquaculture industry, finds its demand directly proportional to the growth of the industry. In addition, the increasing awareness about the nutritional benefits of fortified aquafeed and its role in boosting yield is further reputed to boost the demand. Therefore, these government initiatives, by fostering the growth of the aquaculture industry, will inevitably fuel the rise in global demand for aquafeed.

Segmental Insights

Ingredient Insights

Based on the Ingredient, the Fish Meal segment continues to dominate the Global Aquafeed Market with its high protein content and exceptional nutritional value that promotes the growth and overall well-being of aquatic species. Its superior feed qualities have gained widespread recognition in the aquaculture industry worldwide, making it the preferred choice for ensuring optimal health and productivity in aquatic ecosystems. The rich protein composition of fish meal provides a reliable source of amino acids necessary for the development of strong muscles in fish. Additionally, the presence of essential fatty acids in fish meal supports the proper functioning of vital organs, contributing to the overall well-being of aquatic species. These fatty acids also play a crucial role in enhancing the immune system of fish, making them more resilient against diseases.

Furthermore, the inclusion of fish meal in aquafeed has proven to be beneficial for reproductive processes in fish. The essential nutrients present in fish meal facilitate successful breeding, ensuring a sustainable approach to aquaculture practices. By supporting the reproductive functions of aquatic species, fish meal helps maintain healthy population levels and promotes the long-term sustainability of aquaculture. The remarkable qualities of fish meal, including its high protein content, nutritional value, and positive impact on muscle development, immune system function, and reproductive processes, make it an indispensable component in the quest for sustainable and productive aquaculture practices.

Additives Insights

Based on the Additives, the dominance of Amino Acids in the aquafeed industry can be attributed to their critical role in supporting the growth and development of various aquatic life forms. These essential building blocks of proteins are vital for maintaining optimal health and performance in fish and other aquatic species. However, it is important to note that the aquafeed market comprises not only Amino Acids, but also a range of other components that play significant roles in ensuring a balanced and nutritionally rich diet for aquatic organisms. These include Vitamins & Minerals, which support various physiological functions, Prebiotics & Probiotics, which aid in digestive health, Enzymes, which facilitate nutrient absorption, Antibiotics, which help prevent and treat diseases, and many others. The combined contribution of these components ensures that aquafeed provides the necessary nutrients for the overall well-being of aquatic life.

Regional Insights

The Asia-Pacific region is currently dominating the Global Aquafeed Market. This can be attributed to the remarkable growth in fish farming operations, particularly in countries like China, India, and Vietnam. These nations have witnessed a surge in demand for seafood, fueled by a growing population and changing dietary preferences. In China, for instance, the rise of the middle class has led to an increased consumption of fish and other seafood products. As people's incomes and living standards improve, they are seeking healthier and more diverse food options, with seafood being a popular choice. This has prompted the aquaculture industry to expand and invest in advanced technologies and practices to meet this growing demand.

Similarly, in India, the coastal regions have seen a significant increase in fish farming activities. With a vast coastline and abundant water resources, the country holds great potential for the aquaculture sector. The government has also been actively promoting fish farming as a means of generating income and reducing unemployment in rural areas. This has further propelled the growth of the aquafeed market in the region.

Vietnam, known for its thriving aquaculture industry, has also played a key role in the dominance of the Asia-Pacific region in the global aquafeed market. The country has been implementing sustainable aquaculture practices and investing in research and development to improve the quality and efficiency of aquafeed production. This focus on sustainability has not only contributed to the growth of the industry but has also helped preserve marine ecosystems and ensure the long-term viability of aquaculture. Overall, the emphasis on sustainability and the increasing demand for seafood in the Asia-Pacific region have driven the expansion of the aquafeed industry. Companies in the region are striving to develop innovative and eco-friendly feed solutions to meet the growing needs of the aquaculture sector while preserving the environment.

Key Market Players

Archer Daniels Midland Company

Ridley Corporation Limited

DE Heus Animal Nutrition B.V.

Biostadt India Limited

NK Ingredients Pte Ltd.

Marubeni Nisshin Feed Co., Ltd.

Cargill, Inc

Nutreco N.V

Avanti Feeds Ltd

Charoen Pokphand Foods Public Company Limited

Report Scope:

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

Aquafeed Market, By Ingredient:

Soybean

Fish Meal

Corn

Fish Oil

Additives

Others

Aquafeed Market, By Additives:

Amino Acids

Vitamins & Minerals

Prebiotics & Probiotics

Enzymes

Antibiotics

Other

Aquafeed Market, By Species:

Fish

Crustaceans

Molluscs

Other

Aquafeed Market, By Form:

Dry Form

Wet Form

Moist Form

Aquafeed Market, By Lifecycle:

Grower feed

Finisher feed

Starter feed

Brooder feed

Aquafeed 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 Aquafeed Market.

Available Customizations:

Global Aquafeed 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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