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Feed Phytogenic Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented by Sub Additive (Essential Oil, Herbs & Spices, others), by Animal (Aquaculture, Poultry, Ruminants, Swine, others), and By Region, Competition

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Abstracts

Global Feed Phytogenic Market has valued at USD 740.01 Million in 2022 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 6.05% through 2028. Feed phytogenics, often referred to as phytogenic feed additives or simply phytogenics, are natural plant-based compounds that are used as additives in animal nutrition. These compounds are derived from various parts of plants, such as leaves, roots, seeds, and fruits, and are rich in bioactive substances. Feed phytogenics are used to enhance the overall health, performance, and well-being of livestock and poultry without the use of synthetic chemicals or antibiotics. Feed phytogenics are sourced from plants and are composed of a wide range of natural compounds, including essential oils, tannins, saponins, flavonoids, and various other phytochemicals. Phytogenics exert their effects through multiple modes of action, including antimicrobial, anti-inflammatory, digestive stimulation, antioxidant, and immunomodulatory properties. These compounds can influence various physiological processes in animals. Many phytogenic compounds, such as essential oils and plant extracts, possess natural antimicrobial and anti-inflammatory properties, making them valuable in controlling pathogens and reducing inflammation in the gastrointestinal tract.

There is a global trend toward natural and sustainable animal nutrition solutions. Phytogenic feed additives, derived from plant-based sources, are perceived as natural and eco-friendly alternatives to synthetic additives. Phytogenics are known to promote

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gut health in animals, improving nutrient absorption, reducing digestive disorders, and enhancing overall performance. These benefits drive their adoption in animal nutrition. Phytogenic additives are seen as environmentally sustainable options due to their plant-based origins and potential to reduce the environmental impact of animal agriculture. Phytogenics can enhance nutrient utilization and feed efficiency in animals, reducing feed costs and improving production economics. The expansion of animal agriculture in emerging markets and the increasing demand for animal protein worldwide have contributed to the growth of the phytogenic feed additive market.

Key Market Drivers

Technological Advancements

Advanced extraction methods and formulation techniques have been developed to efficiently extract and concentrate bioactive compounds from plant sources. These methods help maintain the stability and bioavailability of active ingredients in phytogenic additives. Microencapsulation technology allows for the protection of sensitive phytogenic compounds from environmental factors like heat, moisture, and oxidation. This technology enhances the stability and controlled release of active ingredients in animal diets. Nanoparticles are increasingly being used to encapsulate phytogenic compounds, improving their solubility and bioavailability. Nanotechnology can enhance the targeted delivery of active ingredients in the gastrointestinal tract. Coating phytogenic additives with protective layers can improve their stability and release characteristics in feed formulations, ensuring the controlled release of bioactive compounds in the digestive tract. Essential oils are prone to oxidation and volatility. Encapsulation technologies help stabilize essential oils and release them gradually in the gut, maximizing their effectiveness.

Advances in genomics and bioinformatics enable researchers to identify specific plant varieties with desired bioactive compounds. This knowledge aids in the selection and breeding of plants for phytogenic feed additive production. The development of phytogenic blends combines multiple plant-based ingredients with complementary properties. These blends are formulated to address specific animal health and performance challenges, offering a broader range of benefits. Advanced analytical techniques, such as high-performance liquid chromatography (HPLC) and mass spectrometry, are used to analyze the composition and quality of phytogenic additives, ensuring consistency and standardization. Innovative delivery systems, including pelletizing, extrusion, and inclusion in premixes, have been developed to ensure uniform distribution of phytogenic additives in animal feed. Technologies that enhance

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the sensory properties of phytogenic additives, such as flavor masking and odor control, can improve the palatability of animal feed. Ongoing research aims to better understand the mode of action of phytogenic compounds in animal physiology. This knowledge helps optimize their use in animal nutrition. Modern quality assurance and traceability systems are employed to monitor the production and supply chain of phytogenic additives, ensuring safety and compliance with regulatory standards. This factor will help in the development of Global Feed Phytogenic Market.

Increasing Demand of Gut Health and Performance Enhancement

Phytogenic feed additives have gained popularity due to their positive impact on the gastrointestinal health of animals and their ability to enhance overall performance. Phytogenic additives can enhance the digestibility of nutrients in animal feed. They stimulate the secretion of digestive enzymes and improve nutrient absorption in the gastrointestinal tract. This leads to better utilization of feed nutrients, resulting in improved feed efficiency and overall performance. Phytogenics can help maintain a balanced and healthy gut microbiota in animals. They promote the growth of beneficial microorganisms while inhibiting the proliferation of harmful pathogens. This balanced gut microbiota contributes to improved gut health and reduced incidence of digestive disorders. Phytogenic feed additives are known for their anti-inflammatory and antimicrobial properties, which help reduce the occurrence of common digestive disorders such as diarrhea, enteritis, and colitis in animals. This leads to healthier animals and better performance. A healthy gut plays a crucial role in supporting the animal's immune system. Phytogenic additives can strengthen the immune response, making animals more resistant to diseases and stressors. This contributes to reduced mortality rates and improved performance. Some phytogenic compounds have calming and stress-reducing effects on animals. This is particularly beneficial during stressful events such as transportation, handling, and changes in diet. Reduced stress levels can positively impact animal performance.

As concerns about antibiotic resistance grow, there is a demand for alternatives that promote gut health and reduce the need for antibiotics. Phytogenic feed additives are considered effective natural alternatives to antibiotics in promoting animal health. Animals that have improved gut health are more likely to experience consistent growth rates and weight gain. Phytogenic additives contribute to steady and optimized growth throughout the production cycle. The focus on sustainable animal agriculture practices includes optimizing feed efficiency and reducing the environmental impact of animal production. Phytogenic feed additives align with these sustainability goals by improving nutrient utilization and reducing the excretion of nutrients into the environment.

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Consumer preferences for meat and animal products from animals raised with natural and sustainable feed additives have driven the adoption of phytogenic additives in animal diets. Meeting these consumer demands is essential for the livestock and poultry industries. This factor will pace up the demand of Global Feed Phytogenic Market.

Growing Demand for Natural Products

Consumers, producers, and regulators are increasingly seeking natural and sustainable solutions in animal agriculture, and phytogenic additives align with these preferences. Consumers are becoming more conscious of the foods they consume and their sources. There is a growing demand for meat, dairy, and eggs from animals raised with natural and minimally processed feed additives. Phytogenic additives, derived from plant-based sources, are perceived as natural and eco-friendly. Clean labeling, which emphasizes transparency and simplicity in ingredient lists, is a trend in the food industry. Phytogenic feed additives are seen as clean label ingredients because they are plant-derived and align with clean labeling principles. Sustainable agriculture practices are becoming increasingly important. Phytogenic additives are considered sustainable because they are derived from renewable plant sources and can contribute to reduced environmental impact in animal agriculture.

Concerns about the use of synthetic chemicals, including antibiotics and synthetic additives, in animal agriculture have led to a search for natural alternatives. Phytogenic additives offer a natural solution to reduce reliance on synthetic feed additives. Phytogenic feed additives can play a role in reducing the need for antibiotics in animal diets. As regulations and consumer pressure lead to antibiotic reduction in animal agriculture, phytogenic additives are seen as valuable alternatives. Natural feed additives, such as phytogenics, are often associated with improved animal welfare. These additives can contribute to better gut health, reduced stress, and enhanced overall well-being in animals. Regulatory authorities in various regions have recognized the safety and efficacy of certain phytogenic feed additives, which has facilitated their approval and use as natural feed additives. The demand for natural and sustainable products is not limited to specific regions but is a global phenomenon. Phytogenic additives meet the needs of producers looking to supply international markets with natural and sustainable animal products. Natural feed additives like phytogenics can help producers differentiate their products in the market and meet the preferences of consumers looking for natural and sustainable options. Phytogenic additives align with environmental awareness by promoting more efficient nutrient utilization in animals, reducing nutrient runoff, and contributing to responsible agricultural practices. This factor will accelerate the demand of Global Feed Phytogenic Market.

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Key Market Challenges

Standardization and Quality Control

Ensuring the consistent quality, safety, and efficacy of phytogenic feed additives is essential for their acceptance and successful use in animal nutrition. Phytogenic feed additives are derived from various plant sources, and the composition of these plants can vary due to factors such as climate, soil conditions, and harvesting methods. This natural variability can make it challenging to maintain consistent quality across batches. Phytogenic additives often contain multiple plant-based ingredients with different bioactive compounds. Achieving consistent ratios of these compounds in formulations can be difficult. Analyzing the composition and concentration of active compounds in phytogenic additives requires advanced analytical techniques like high-performance liquid chromatography (HPLC) and mass spectrometry. These techniques can be complex and costly to implement. Quality control processes must be robust and comprehensive to ensure that phytogenic additives meet safety and quality standards. This includes monitoring raw materials, production processes, and final products. The stability of phytogenic additives, especially those containing volatile essential oils, can be a challenge. Maintaining product stability and shelf life is crucial to ensure efficacy and safety. Meeting regulatory requirements and obtaining approvals for phytogenic additives can vary by region and require comprehensive documentation of safety, efficacy, and quality.

Species-Specific Formulations

Developing and testing species-specific formulations can be resource intensive. It requires research to understand the specific nutritional needs, digestive physiology, and health challenges of different animal species. Creating customized formulations for various species and production stages can add complexity to the production process. Manufacturers need to ensure accurate dosing and uniform distribution of phytogenic additives in feed. Ensuring the consistency and quality of species-specific formulations across batches is essential. Quality control measures become more challenging when producing multiple variations of phytogenic products. The need for different formulations for various species can fragment the market, making it more challenging for manufacturers to scale production and distribution efficiently. Regulatory approval processes may differ for species-specific formulations, requiring additional compliance efforts and documentation. Users of phytogenic feed additives, including livestock producers and feed manufacturers, may require specific education and training on the

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use of species-specific formulations to achieve optimal results.

Key Market Trends

Antibiotic Reduction

The misuse and overuse of antibiotics in animal agriculture have raised concerns about the development of antibiotic-resistant bacteria, which pose a threat to both animal and human health. Reducing antibiotic usage is seen as a critical step in addressing this issue. Many countries and regions have implemented stricter regulations and guidelines regarding the use of antibiotics in animal feed. These regulations aim to limit antibiotic use for growth promotion and prophylactic purposes, further driving the search for antibiotic alternatives. Consumers are increasingly seeking meat and animal products from animals raised without the use of antibiotics. This consumer demand for antibiotic-free products has encouraged producers to adopt alternative strategies, including the use of phytogenic feed additives. Phytogenic additives can contribute to improved animal health and welfare by promoting better gut health, reducing stress, and enhancing overall well-being. This makes them valuable alternatives to antibiotics for maintaining animal health. Phytogenics are known to enhance feed efficiency, promote nutrient absorption, and improve animal performance. These benefits can help compensate for the growth-promoting effects of antibiotics. Phytogenic feed additives have multiple modes of action, including antimicrobial, anti-inflammatory, and digestive-enhancing properties. These mechanisms of action make them effective in supporting animal health without relying on antibiotics. The use of phytogenic feed additives can result in reduced antibiotic residues in animal products, aligning with food safety and residue tolerance regulations.

Segmental Insights

Sub Additive Insights

In 2022, the Global Feed Phytogenics Market was dominated by Essential Oil segment in the forecast period and is predicted to continue expanding over the coming years. Essential oils are derived from plant sources, and they are often perceived as natural and sustainable feed additives. This aligns with consumer and industry preferences for natural and environmentally friendly solutions in animal nutrition. Many essential oils possess antimicrobial properties due to their bioactive compounds. These properties can help mitigate the growth of harmful pathogens in the gastrointestinal tract of animals, contributing to better gut health and reduced disease risk. Essential oils are

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known to enhance the digestibility of nutrients in animal feed. They can stimulate digestive enzyme secretion and improve nutrient absorption, leading to improved feed efficiency and animal performance. As concerns about antibiotic resistance grow, essential oils have gained attention as alternatives to antibiotics in animal nutrition. They can help support animal health without the risk of promoting antibiotic resistance.

Animal Insights

In 2022, the Global Feed Phytogenics Market dominated by poultry segment and is predicted to continue expanding over the coming years. The poultry industry is one of the largest and most rapidly growing sectors of the global livestock and meat production industry. The sheer scale of poultry production, including broilers (meat) and layers (eggs), creates substantial demand for feed additives, including phytogenic. Phytogenic feed additives are known for their ability to improve feed efficiency in poultry. They can enhance nutrient utilization, reduce feed conversion ratios, and promote better weight gain and egg production, all of which are critical factors in poultry farming. Poultry can be sensitive to stressors such as heat, transportation, and dietary changes. Phytogenic additives, through their calming and stress-reducing properties, can help mitigate the negative effects of stress in poultry.

Regional Insights

The Asia Pacific region dominates the Global Feed Phytogenics Market in 2022. The Asia-Pacific area accounts for most of the feed phytogenics consumption on the global market, which has grown significantly in recent years. Due to the rapidly growing cattle industry and a growth in regional demand for meat and meat products, the market is expected to grow by 40% between 2017 and 2022. As a result, during the projected period, the demand for feed phytogenics in the Asia-Pacific region is anticipated to grow at a CAGR of 4.2%. The market for feed phytogenics is seeing significant growth because to the increased demand for high-quality meat and milk on the international stage as well as the rising disposable income in industrialized economies.

Key Market Players

Adisseo Espana SA

Alltech, Inc.

Borregaard AS

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Cargill Inc.

DSM Nutritional Products AG

IFF (Danisco Animal Nutrition)

Kemin Industries Inc.

Land O'Lakes Inc.

Marubeni Corporation (Orffa International Holding B.V.)

Prinova Group LLC

Report Scope:

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

Feed Phytogenics Market, By Sub Additive:

Essential Oil

Herbs & Spices

Others

Feed Phytogenics Market, By Animal:

Aquaculture

Fish

Shrimp

Other Aquaculture Species

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Poultry

Broiler

Layer

Other Poultry Birds

Ruminants

Beef Cattle

Dairy Cattle

Other Ruminants

Swine

Others

Global Feed Phytogenics Market, By region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

South Korea

Australia

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Japan

Europe

Germany

France

United Kingdom

Spain

Italy

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Feed Phytogenics Market.

Available Customizations:

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Global Feed Phytogenics 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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