

Medicated Feed Additives Market – Global Industry Size, Share, Trends, Opportunity, & Forecast 2019-2029 Segmented By Type (Antibiotics, Vitamins, Antioxidants, Amino Acids, Prebiotics, Probiotics, Enzymes, Other), By Mixture Type (Supplements, Concentrates, Premixes, Base Mixes), By Animal Type (Ruminants, Swine, Poultry, Aquaculture, Others), By Region, Competition

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Abstracts

Global Medicated Feed Additives Market was valued at USD 11.80 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 5.43% through 2029. The Global Medicated Feed Additives Market is a dynamic and evolving sector within the broader animal feed industry. It encompasses a diverse range of additives designed to enhance the nutritional content, health, and overall performance of livestock. These additives, often incorporating pharmaceutical agents, minerals, vitamins, and other bioactive compounds, play a crucial role in modern livestock production systems.

Key Market Drivers

Increasing Demand for Livestock Products

The world's population is steadily increasing, particularly in emerging economies. This demographic shift has led to a surge in demand for protein-rich food sources, such as meat, milk, and eggs. As urbanization accelerates and dietary patterns evolve, there is a heightened need for efficient and sustainable livestock production systems to meet

the growing demand for animal-derived products. Urbanization and the expansion of the middle-class population in various regions are influencing dietary habits. With an increasing number of people residing in urban areas and experiencing higher disposable incomes, there is a corresponding rise in the consumption of animal protein. This urbanization trend is driving the demand for livestock products and, consequently, the need for technologies and additives that can enhance the productivity of livestock to meet this growing market.

The intensification of livestock farming practices is another factor contributing to the demand for medicated feed additives. In order to meet the escalating demand for livestock products, many farmers are adopting intensive farming methods. These methods often involve higher stocking densities and faster growth rates, creating a necessity for feed additives that can support the health, growth, and overall performance of animals under more intensive production systems. The globalization of the livestock industry has led to increased competition and a focus on efficiency in production. Livestock farmers worldwide are seeking ways to enhance the productivity of their operations to remain competitive in the global market. Medicated feed additives offer a strategic solution by promoting faster growth, improving feed conversion ratios, and reducing the risk of diseases, thus making livestock production more efficient and globally competitive.

Regulatory changes and concerns about antibiotic resistance have influenced the use of medicated feed additives. In some regions, restrictions on the use of antibiotics as growth promoters have led to a shift in focus towards alternative feed additives. Probiotics, prebiotics, and other non-antibiotic additives are gaining popularity as they align with changing regulations and consumer preferences for more sustainable and responsible farming practices. Livestock farming is a significant economic activity in many countries. The economic importance of the livestock sector, combined with the potential for increased revenue through the sale of livestock products, incentivizes farmers to invest in technologies and additives that can enhance the overall productivity and profitability of their operations.

Growing Concerns About Animal Health and Disease Prevention

Growing concerns about animal health and disease prevention represent a significant driver propelling the growth of the Global Medicated Feed Additives Market. This driver is characterized by a range of factors, each contributing to the increased demand for feed additives aimed at maintaining the health and well-being of livestock. The occurrence of diseases within livestock populations poses a serious threat to the

economic viability of the livestock industry. Outbreaks of diseases such as avian influenza, foot-and-mouth disease, and others can result in substantial economic losses, including the culling of infected animals, decreased productivity, and disruptions to the supply chain. Medicated feed additives, such as antibiotics and antimicrobials, play a crucial role in preventing and controlling the spread of diseases, thereby minimizing economic losses.

Zoonotic diseases, which can be transmitted from animals to humans, raise significant concerns about food safety. Consumers are increasingly aware of the potential health risks associated with the consumption of products from animals that may carry diseases. Medicated feed additives contribute to reducing the prevalence of diseases in livestock, addressing zoonotic concerns and enhancing the safety of food products derived from animals. The emergence of antibiotic resistance has prompted regulatory authorities to scrutinize and regulate the use of antibiotics in livestock farming. This has led to a shift towards alternative feed additives that promote animal health without relying heavily on antibiotics. The industry is witnessing a growing interest in probiotics, prebiotics, and other non-antibiotic additives as viable alternatives. The need to comply with changing regulations and consumer preferences is driving the adoption of feed additives that support animal health in a sustainable manner.

Concerns about animal welfare and ethical farming practices are influencing the choices made by consumers, retailers, and producers. Livestock farmers are increasingly recognizing the importance of maintaining the health and well-being of their animals not only for economic reasons but also to align with ethical standards. Medicated feed additives contribute to improved animal health, reducing the incidence of diseases and promoting ethical farming practices. There is a growing awareness among livestock farmers about the importance of proactive health management in preventing diseases. Farmers are adopting preventive measures, including the use of medicated feed additives, to maintain the overall health and resilience of their livestock. This proactive approach is driven by the desire to avoid the costs and disruptions associated with disease outbreaks.

Technological Advancements in Feed Additives

Technological advancements in feed additives constitute a significant driver propelling the growth of the Global Medicated Feed Additives Market. This driver is characterized by continuous innovations and improvements in the formulation, delivery, and efficacy of feed additives, influencing the efficiency, sustainability, and overall performance of livestock farming. Technological advancements have led to the development of

precision delivery systems for feed additives. These systems ensure accurate and targeted administration of additives to livestock, optimizing absorption and efficacy. Precision delivery helps farmers achieve better control over dosage, minimizing waste, and ensuring that animals receive the right amount of nutrients or medications for their specific needs.

Microencapsulation and coating technologies have revolutionized the formulation of feed additives. These techniques involve enclosing active ingredients within protective layers, improving stability, bioavailability, and controlled release. This innovation enhances the effectiveness of medicated feed additives, allowing for better nutrient absorption and prolonged activity within the animal's digestive system. Ongoing research and development efforts have resulted in the creation of specialized feed additives tailored to address specific challenges in animal health and nutrition. For instance, additives designed to enhance gut health, boost immunity, or improve feed efficiency have become increasingly sophisticated. These specialized formulations are a response to the diverse and evolving needs of livestock farmers seeking targeted solutions for their production challenges.

Nutrigenomics, the study of how nutrition interacts with an individual's genes, is influencing the development of personalized nutrition solutions for livestock. Feed additives are being designed to align with the genetic and physiological characteristics of specific breeds or individual animals. This personalized approach enhances the precision and effectiveness of medicated feed additives, contributing to improved health, growth, and productivity. The global focus on sustainable agriculture has spurred the development of eco-friendly feed additives. Technological advancements enable the creation of additives that not only enhance animal health but also align with environmental sustainability goals. This includes the use of renewable resources, reduction of environmental impact, and development of additives that promote resource efficiency in livestock farming.

Rising Focus on Animal Nutrition and Feed Efficiency

The rising focus on animal nutrition and feed efficiency is a pivotal driver propelling the growth of the Global Medicated Feed Additives Market. This driver is characterized by an increased awareness among livestock farmers and the broader industry about the importance of optimizing animal nutrition for improved health, growth, and overall efficiency in feed utilization. Consumers globally are becoming increasingly conscious of the quality of animal products they consume. This includes meat, milk, and eggs. The focus on animal nutrition stems from the need to produce high-quality, nutrient-rich

animal products that meet the expectations of discerning consumers. Medicated feed additives play a crucial role in achieving these quality standards by enhancing the nutritional content of animal feeds.

Livestock farming is a highly competitive industry where optimizing feed efficiency is paramount. Efficient feed utilization directly impacts the cost of production. Medicated feed additives, including growth promoters and enhancers, contribute to better feed conversion ratios, ensuring that animals convert feed into body weight more efficiently. This focus on feed efficiency becomes especially crucial as feed costs represent a significant portion of overall production expenses. Medicated feed additives are formulated to provide a balanced mix of essential nutrients, including vitamins and minerals, promoting overall animal health. Nutrient deficiencies can lead to various health issues and hinder growth. By addressing these nutritional gaps, medicated feed additives contribute to the prevention of diseases, improvement of immune function, and the overall well-being of livestock.

Advancements in animal nutrition science have enabled the development of precision nutrition strategies. Medicated feed additives are formulated with a targeted approach, addressing specific nutritional requirements at different stages of an animal's life cycle. This precision allows farmers to tailor feed formulations to meet the unique needs of their livestock, promoting optimal growth and performance. The global push towards sustainable agriculture includes a focus on efficient resource utilization. Medicated feed additives contribute to sustainability goals by promoting feed efficiency. Animals that convert feed into muscle mass more efficiently require fewer resources, such as water and land. This aligns with sustainable farming practices, where minimizing environmental impact is a key consideration.

Key Market Challenges

Regulatory Constraints and Antibiotic Resistance Concerns

The use of antibiotics in medicated feed additives has come under scrutiny due to concerns about antibiotic resistance. Regulatory bodies in various countries are implementing stricter guidelines and restrictions on the use of antibiotics in livestock farming to address these concerns. This poses a challenge to the market, as antibiotic growth promoters have historically been a significant component of medicated feed additives.

Regulatory constraints may limit the availability and use of certain antibiotics in feed

additives, necessitating the development and adoption of alternative solutions. This shift towards non-antibiotic additives, while aligned with public health goals, requires significant research and development efforts to ensure the effectiveness of alternatives in promoting animal health and growth.

Increasing Cost of Raw Materials

The cost of raw materials used in the formulation of medicated feed additives is subject to fluctuations influenced by factors such as climate conditions, geopolitical events, and global market dynamics. Fluctuations in the prices of key ingredients, including vitamins, minerals, and specialty additives, can impact the overall production costs for feed manufacturers.

The increasing cost of raw materials can result in higher production expenses for medicated feed additives. This, in turn, may lead to elevated product prices for end-users, including livestock farmers. As a result, the cost sensitivity of the livestock industry may present a challenge, potentially slowing down the adoption of medicated feed additives, especially in regions where cost-effective alternatives are available.

Consumer Perceptions and Demand for Antibiotic-Free Products

Changing consumer preferences and heightened awareness about food safety and animal welfare have led to a growing demand for antibiotic-free and naturally produced animal products. This has created a challenge for the medicated feed additives market, particularly for additives that include antibiotics, as consumers seek products perceived as healthier and more ethically produced.

The shift in consumer preferences towards antibiotic-free products may lead to a decrease in demand for medicated feed additives that include antibiotics as growth promoters. Livestock farmers and feed manufacturers may need to adapt by exploring and investing in alternative additives that meet both regulatory requirements and consumer expectations. This shift in consumer sentiment may require strategic marketing and education efforts to communicate the benefits and safety of medicated feed additives that comply with evolving standards.

Key Market Trends

Rise of Non-Antibiotic Additives and Alternatives

There is a notable shift towards the development and adoption of non-antibiotic additives and alternatives in response to concerns about antibiotic resistance and changing regulatory landscapes. As a result, the market is witnessing increased research and innovation in the formulation of additives that promote animal health and growth without relying on traditional antibiotics.

Stricter regulations limiting the use of antibiotics in animal feed. Growing preference for antibiotic-free and naturally produced animal products. Innovations in probiotics, prebiotics, enzymes, and other non-antibiotic additives.

The rise of non-antibiotic additives reflects a commitment to sustainable and responsible farming practices. Feed manufacturers and livestock farmers are increasingly adopting these alternatives to address both regulatory compliance and consumer demands, driving the growth of this segment within the medicated feed additives market.

Focus on Precision Livestock Farming

Precision livestock farming involves the use of technology, data analytics, and sensors to monitor and manage various aspects of livestock production. This trend is gaining prominence in the medicated feed additives market, as farmers seek to optimize the health, nutrition, and overall performance of their livestock through data-driven decision-making.

Integration of sensors and smart devices for real-time monitoring. Utilization of data for predictive modeling and decision support. Targeted administration of medicated feed additives.

Precision livestock farming enhances the efficacy of medicated feed additives by providing insights into the health status, nutritional needs, and behavior of animals. This trend not only contributes to improved farm management but also supports the development of customized feed formulations, reinforcing the market's growth.

Increasing Emphasis on Nutritional Efficiency and Specialty Additives

There is a growing emphasis on achieving optimal nutritional efficiency in livestock production. This trend involves the use of specialty additives, such as amino acids, vitamins, and minerals, to precisely meet the nutritional requirements of different animal species at various stages of development.

Consumers seeking nutrient-rich and sustainably produced animal products. Advances in formulation technologies for specialty additives. Tailoring feed formulations based on genetic and physiological characteristics.

The focus on nutritional efficiency and specialty additives aligns with the industry's goal of producing high-quality animal products efficiently. Livestock farmers are increasingly adopting these additives to optimize growth rates, feed conversion ratios, and the overall health of animals, driving the growth of the medicated feed additives market.

Segmental Insights

Type Insights

Based on the category of Type, the Antibiotics segment emerged as the dominant player in the global market for Medicated Feed Additives in 2023. Long history of efficacy in preventing and treating bacterial infections in livestock. Cost-effectiveness compared to other treatment options. Broad-spectrum action against various pathogens.

Growing concerns about antibiotic resistance leading to stricter regulations and increased research on alternative solutions. Rise of targeted antibiotic therapies and preventive strategies aimed at reducing overall antibiotic use in animal agriculture. The global medicated feed additives market is a dynamic interplay of various factors influencing the dominance of different types. While antibiotics and vitamins currently hold the top positions, the future holds promise for greater diversification and innovation. Antioxidants, amino acids, and gut health solutions are poised for significant growth due to their potential for sustainable and holistic animal health management. Ultimately, the market will continue to evolve, driven by scientific advancements, changing consumer preferences, and regional regulations. These factors are expected to drive the growth of this segment.

Mixture Type Insight

Based on the category of Mixture Type, the Supplements segment emerged as the dominant player in the global market for Medicated Feed Additives in 2023. Ease of use and flexibility: Allow for direct addition to existing feed or water, ideal for small farms and addressing specific deficiencies. Available in various forms like powders, liquids, and granules, catering to diverse animal species and needs. Often cheaper than concentrates or premixes, making them attractive for price-sensitive markets.

Growing focus on targeted supplementation based on individual animal requirements and precision feeding principles. Development of more palatable and readily absorbable supplement forms for improved efficacy and animal acceptance. Potential for blended supplements combining various additives for synergistic benefits.

Animal Type Insights

The Swine segment is projected to experience rapid growth during the forecast period. Largest global livestock population: High demand for feed additives due to intensive farming practices and rapid growth cycles. Specific nutritional needs: Require supplementation with certain vitamins, minerals, and amino acids not readily available in their diets. Focus on disease prevention and growth promotion: Additives play a crucial role in preventing bacterial infections and optimizing feed efficiency.

Precision feeding strategies tailored to specific swine breeds, genotypes, and growth stages, influencing the demand for individual additives. Growing focus on animal welfare and antibiotic reduction, leading to increased use of additives for gut health and immune support. Potential for alternative feed ingredients like insect protein or algae impacting the sourcing and formulation of additives. These factors collectively contribute to the growth of this segment.

Regional Insights

Asia-Pacific emerged as the dominant player in the global Medicated Feed Additives market in 2023, holding the largest market share in terms of value. Soaring animal protein demand, fueled by a billion-strong population and rising disposable incomes, creates an insatiable hunger for additives. Governments across the region are actively bolstering animal agriculture development, paving the way for feed production and additive adoption. Cost-consciousness reigns supreme, driving the use of locally produced, affordable additives tailored to regional needs. Disease prevention in high-density farms is a top priority, with additives playing a vital role in boosting immunity and mitigating outbreaks.

The Europe market is poised to be the fastest-growing market, offering lucrative growth opportunities for Medicated Feed Additives players during the forecast period. Factors such as Quality reigns supreme, driven by stringent regulations and consumer preferences for animal welfare. Premium additives are the name of the game. Innovation thrives, with advancements in precision livestock farming and data-driven

approaches optimizing additive use. R&D muscle is unmatched, leading to breakthroughs in sustainable and targeted solutions for improved animal well-being.

Key Market Players

Phibro Animal Health Corporation

Provimi Animal Nutrition

Zoetis Inc.

Cargill Inc.

Archer Daniels Midland Company

CHS Inc.

Purina Animal Nutrition (Land O' Lakes)

Adisseo France SAS

Kemin Industries

Alltech Inc.

Report Scope:

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

Medicated Feed Additives Market, By Type:

Antibiotics

Vitamins

Antioxidants

Amino Acids

Prebiotics

Probiotics

Enzymes

Other

Medicated Feed Additives Market, By Mixture Type:

Supplements

Concentrates

Premixes

Base Mixes

Medicated Feed Additives Market, By Animal Type:

Ruminants

Swine

Poultry

Aquaculture

Others

Medicated Feed Additives 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

Competitive Landscape

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

Available Customizations:

Global Medicated Feed Additives market report with the given market data, TechSci 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Source
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL MEDICATED FEED ADDITIVES MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Type (Antibiotics, Vitamins, Antioxidants, Amino Acids, Prebiotics, Probiotics, Enzymes, Other)
 - 5.2.2. By Mixture Type (Supplements, Concentrates, Premixes, Base Mixes)
 - 5.2.3. By Animal Type (Ruminants, Swine, Poultry, Aquaculture, Others)

- 5.2.4. By Region
- 5.2.5. By Company (2023)
- 5.3. Market Map

6. NORTH AMERICA MEDICATED FEED ADDITIVES MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Type
 - 6.2.2. By Mixture Type
 - 6.2.3. By Animal Type
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Medicated Feed Additives Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Type
 - 6.3.1.2.2. By Mixture Type
 - 6.3.1.2.3. By Animal Type
 - 6.3.2. Canada Medicated Feed Additives Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Type
 - 6.3.2.2.2. By Mixture Type
 - 6.3.2.2.3. By Animal Type
 - 6.3.3. Mexico Medicated Feed Additives Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Type
 - 6.3.3.2.2. By Mixture Type
 - 6.3.3.2.3. By Animal Type

7. EUROPE MEDICATED FEED ADDITIVES MARKET OUTLOOK

- 7.1. Market Size & Forecast

- 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Type
 - 7.2.2. By Mixture Type
 - 7.2.3. By Animal Type
 - 7.2.4. By Country
- 7.3. Europe: Country Analysis
 - 7.3.1. Germany Medicated Feed Additives Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Type
 - 7.3.1.2.2. By Mixture Type
 - 7.3.1.2.3. By Animal Type
 - 7.3.2. United Kingdom Medicated Feed Additives Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Type
 - 7.3.2.2.2. By Mixture Type
 - 7.3.2.2.3. By Animal Type
 - 7.3.3. Italy Medicated Feed Additives Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Type
 - 7.3.3.2.2. By Mixture Type
 - 7.3.3.2.3. By Animal Type
 - 7.3.4. France Medicated Feed Additives Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Type
 - 7.3.4.2.2. By Mixture Type
 - 7.3.4.2.3. By Animal Type
 - 7.3.5. Spain Medicated Feed Additives Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value
 - 7.3.5.2. Market Share & Forecast

- 7.3.5.2.1. By Type
- 7.3.5.2.2. By Mixture Type
- 7.3.5.2.3. By Animal Type

8. ASIA-PACIFIC MEDICATED FEED ADDITIVES MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Type
 - 8.2.2. By Mixture Type
 - 8.2.3. By Animal Type
 - 8.2.4. By Country
- 8.3. Asia-Pacific: Country Analysis
 - 8.3.1. China Medicated Feed Additives Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Type
 - 8.3.1.2.2. By Mixture Type
 - 8.3.1.2.3. By Animal Type
 - 8.3.2. India Medicated Feed Additives Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value
 - 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Type
 - 8.3.2.2.2. By Mixture Type
 - 8.3.2.2.3. By Animal Type
 - 8.3.3. Japan Medicated Feed Additives Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Type
 - 8.3.3.2.2. By Mixture Type
 - 8.3.3.2.3. By Animal Type
 - 8.3.4. South Korea Medicated Feed Additives Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value
 - 8.3.4.2. Market Share & Forecast

- 8.3.4.2.1. By Type
- 8.3.4.2.2. By Mixture Type
- 8.3.4.2.3. By Animal Type
- 8.3.5. Australia Medicated Feed Additives Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Type
 - 8.3.5.2.2. By Mixture Type
 - 8.3.5.2.3. By Animal Type

9. SOUTH AMERICA MEDICATED FEED ADDITIVES MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Type
 - 9.2.2. By Mixture Type
 - 9.2.3. By Animal Type
 - 9.2.4. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Medicated Feed Additives Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Type
 - 9.3.1.2.2. By Mixture Type
 - 9.3.1.2.3. By Animal Type
 - 9.3.2. Argentina Medicated Feed Additives Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Type
 - 9.3.2.2.2. By Mixture Type
 - 9.3.2.2.3. By Animal Type
 - 9.3.3. Colombia Medicated Feed Additives Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast

- 9.3.3.2.1. By Type
- 9.3.3.2.2. By Mixture Type
- 9.3.3.2.3. By Animal Type

10. MIDDLE EAST AND AFRICA MEDICATED FEED ADDITIVES MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Type

10.2.2. By Mixture Type

10.2.3. By Animal Type

10.2.4. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Medicated Feed Additives Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Type

10.3.1.2.2. By Mixture Type

10.3.1.2.3. By Animal Type

10.3.2. Saudi Arabia Medicated Feed Additives Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Type

10.3.2.2.2. By Mixture Type

10.3.2.2.3. By Animal Type

10.3.3. UAE Medicated Feed Additives Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Type

10.3.3.2.2. By Mixture Type

10.3.3.2.3. By Animal Type

11. MARKET DYNAMICS

- 11.1. Drivers
- 11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Recent Developments
- 12.2. Product Launches
- 12.3. Mergers & Acquisitions

13. GLOBAL MEDICATED FEED ADDITIVES MARKET: SWOT ANALYSIS

14. COMPETITIVE LANDSCAPE

- 14.1. Phibro Animal Health Corporation
 - 14.1.1. Business Overview
 - 14.1.2. Product & Service Offerings
 - 14.1.3. Recent Developments
 - 14.1.4. Key Personnel
 - 14.1.5. SWOT Analysis
 - 14.1.6. Financials (As Reported)
- 14.2. Provimi Animal Nutrition
- 14.3. Zoetis Inc.
- 14.4. Cargill Inc.
- 14.5. Archer Daniels Midland Company
- 14.6. CHS Inc.
- 14.7. Purina Animal Nutrition (Land O' Lakes)
- 14.8. Adisseo France SAS
- 14.9. Kemin Industries
- 14.10. Alltech Inc.

15. STRATEGIC RECOMMENDATIONS

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