

Probiotics in Animal Feed Market – Global Industry Size, Share, Trends, Opportunity, & Forecast 2018-2028 Segmented By Livestock (Poultry, Swine, Ruminants, Aquaculture, Pets, Others), By Source (Bacteria, Yeast & Fungi), By Form (Dry, Liquid), By Distribution Channel (Retail Stores, Others), By Region, Competition

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Abstracts

Global Probiotics in Animal Feed Market has valued at USD 3.90 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 7.09% through 2028. The global probiotics in animal feed market is a rapidly evolving segment within the broader animal nutrition industry. Probiotics, which are live beneficial microorganisms, have gained prominence as feed additives that promote animal health and improve performance.

The global probiotics in animal feed market is on a growth trajectory driven by the need for sustainable and efficient animal farming practices, the shift away from antibiotics, and the increasing awareness of the benefits of probiotics for animal health and performance. As the industry continues to evolve, it offers opportunities for companies to develop and provide innovative probiotic solutions that cater to the diverse needs of animal producers worldwide.

Key Market Drivers

Increasing Demand for Animal Protein

The 'Increasing Demand for Animal Protein' is a significant market driver for the growth

of the global probiotics in animal feed market. This driver is rooted in the rising global demand for products derived from livestock, including meat, milk, and eggs. As the global population continues to grow, particularly in emerging economies, the demand for animal protein has surged. With more people moving to urban areas and experiencing higher incomes, dietary preferences are shifting towards protein-rich diets. This trend is driving the need for increased animal farming and production. Diets rich in protein are associated with improved nutrition and overall health. As consumers become more health-conscious and aware of the benefits of protein, there is a growing demand for animal-based protein sources. This includes not only traditional animal protein products but also non-traditional sources like aquaculture, which is also experiencing rapid growth.

As middle-class populations expand in many parts of the world, there is a shift in dietary habits towards more meat consumption. This shift is particularly notable in regions like Asia, where traditional diets were often plant-based. This change is driving up the demand for animal protein, which, in turn, fuels the need for efficient and sustainable animal production. Probiotics in animal feed offer a range of benefits that are especially pertinent in the context of increasing demand for animal protein. Probiotics can enhance the efficiency of digestion and nutrient absorption in animals, leading to improved growth rates and higher production yields. By optimizing the utilization of feed, probiotics help livestock and poultry producers meet the demand for animal protein without having to expand production facilities. Modern consumers are increasingly health-conscious and concerned about the source and quality of the food they consume. They seek animal products that are produced sustainably, ethically, and with minimal use of antibiotics or other pharmaceuticals. Probiotics support these goals by promoting animal health naturally, reducing the need for antibiotics, and improving the overall well-being of the animals in the food supply chain.

Focus on Animal Health and Welfare

The 'Focus on Animal Health and Welfare' is a key market driver for the growth of the global probiotics in animal feed market. This driver reflects an increasing emphasis on ensuring the well-being of animals in the agricultural and livestock industries. The focus on animal health and welfare has a profound impact on the adoption of probiotics in animal feed. There is growing consumer awareness and concern regarding the treatment of animals in the food supply chain. Consumers are increasingly seeking products that are produced in a humane and ethical manner. In response to these concerns, regulatory bodies in various countries are introducing and enforcing stricter animal welfare standards. This shift is compelling producers to explore alternatives to

traditional pharmaceutical interventions, such as antibiotics, to maintain animal health. Probiotics offer a natural, sustainable, and ethical approach to improving animal health and welfare. In many regions, the use of antibiotics in animal farming is being restricted or banned due to concerns about antimicrobial resistance and public health. As a result, livestock producers are seeking alternative strategies to keep their animals healthy and productive. Probiotics have gained prominence as a suitable replacement for antibiotics, as they promote a balanced gut microbiome and can help prevent and manage digestive disorders and other health issues without the need for pharmaceuticals.

Probiotics play a critical role in maintaining a balanced gut microbiome in animals. A well-balanced microbiome is associated with better digestion, nutrient absorption, and overall health. By promoting gut health, probiotics can reduce the occurrence of common digestive disorders, such as diarrhea, and enhance the animal's overall well-being. This aligns with the goal of ensuring animal health and welfare. The use of probiotics can help reduce stress in animals, which can occur due to factors like transportation, environmental changes, or overcrowding. Stress can weaken the immune system and make animals more susceptible to diseases. Probiotics support the immune system and can help reduce the incidence of diseases, contributing to overall animal health and welfare. As concerns about sustainability and the environmental impact of animal agriculture grow, there is a need to reduce the environmental footprint of livestock and poultry production. Probiotics can contribute to sustainability by improving feed conversion efficiency and reducing the production of methane gas in ruminant animals. This aligns with broader sustainability goals and ethical considerations in animal farming.

Regulatory Support and Ban on Antibiotics

'Regulatory Support and Ban on Antibiotics' is a significant market driver contributing to the growth of the global probiotics in animal feed market. This driver is closely tied to changing regulations and policies aimed at reducing antibiotic use in animal agriculture. Antibiotic resistance is a global public health concern. Overuse and misuse of antibiotics in both human medicine and animal agriculture have led to the development of antibiotic-resistant strains of bacteria. These antibiotic-resistant bacteria can pose a significant threat to human health by rendering antibiotics less effective in treating bacterial infections. In response to this concern, regulatory authorities have implemented measures to reduce the use of antibiotics in animal farming. Many countries and regions have imposed strict regulations and bans on the use of antibiotics in animal feed. These regulations are designed to limit the use of antibiotics for growth promotion and disease prevention in animals. Such restrictions aim to encourage the adoption of alternative

solutions that are less likely to contribute to antibiotic resistance.

As a result of these regulatory changes, there has been a shift in the animal agriculture industry towards the responsible use of antibiotics. Producers are under pressure to find effective ways to manage the health and growth of their animals without relying on antibiotics. Probiotics have emerged as a viable alternative because they promote animal health and well-being naturally without contributing to antibiotic resistance. Probiotics, which are live beneficial microorganisms, have gained favor as a natural, safe, and sustainable alternative to antibiotics. They work by maintaining a balanced gut microbiome in animals, which enhances digestion, nutrient absorption, and overall health. This, in turn, helps prevent common diseases and improves animal growth and productivity. Probiotics support animal health without the risks associated with antibiotic use. Regulatory support and bans on antibiotics have created incentives for the adoption of probiotics in animal feed. In some cases, governments offer financial incentives or subsidies to producers who adopt probiotics as a means of promoting animal health while adhering to antibiotic reduction goals. This support has accelerated the adoption of probiotics in the industry.

Growing Awareness of Probiotics' Benefits

The 'Growing Awareness of Probiotics' Benefits' is a significant market driver for the growth of the global probiotics in animal feed market. This driver is rooted in the increasing understanding of the positive impact that probiotics can have on animal health, performance, and overall well-being. A substantial body of scientific research has been conducted to better understand the role of probiotics in animal health and performance. This research has provided compelling evidence that probiotics, when administered in appropriate quantities, can have a wide range of benefits. These benefits include improved digestion, enhanced nutrient absorption, immune system support, and a reduction in the incidence of digestive disorders. This growing scientific knowledge has been instrumental in increasing awareness of probiotics' potential in animal feed. As the awareness of probiotics' benefits spreads, many livestock and poultry producers have come to recognize the practical advantages of using probiotics in their operations. Probiotics are known to enhance growth rates and production yields by optimizing the digestion and absorption of nutrients. This, in turn, can lead to more efficient and profitable animal farming, attracting producers' attention.

There is a heightened global focus on health and sustainability in food production. Consumers are increasingly conscious of how animals are raised and how their food is sourced. Probiotics are perceived as a natural and sustainable approach to animal

health, aligning with consumer preferences for products that are produced with minimal reliance on antibiotics or synthetic growth promoters. The growing awareness of these health and sustainability concerns is driving demand for probiotic-enhanced animal feed. Veterinarians and animal nutritionists are key stakeholders in the livestock and poultry industries. As they become more aware of the benefits of probiotics, they often recommend their use to livestock producers. The credibility and expertise of these professionals play a crucial role in driving the adoption of probiotics in animal farming practices. Probiotic manufacturers and suppliers actively promote the benefits of their products through marketing and educational initiatives. They work to inform producers and other industry stakeholders about the advantages of incorporating probiotics into animal feed. This proactive promotion has contributed to the growing awareness of probiotics' benefits and their potential to improve animal health and performance.

Key Market Challenges

Regulatory Hurdles and Standards

Regulatory frameworks and standards for probiotics in animal feed can vary significantly from one country or region to another. Inconsistencies in regulations can create challenges for producers and suppliers who operate in multiple markets. Meeting the regulatory requirements in each jurisdiction can be time-consuming and costly. Additionally, regulatory changes, such as those affecting the approval process for probiotic strains, can create uncertainty and slow down market growth.

Moreover, while some countries have introduced regulations to support the use of probiotics, others have yet to establish clear guidelines. The absence of specific regulations in certain markets can deter potential investments and market expansion. To address these challenges, industry stakeholders need to actively engage with regulatory authorities to establish clear, harmonized standards and facilitate compliance.

Product Stability and Viability

Probiotics are living microorganisms, and their viability is essential for their effectiveness. Maintaining the stability and viability of probiotics throughout the manufacturing, storage, and distribution processes can be a significant challenge. Factors like temperature, humidity, and oxygen exposure can impact the survivability of probiotic strains. Ensuring that probiotics remain active and viable until they reach the animals' digestive systems is essential for achieving the desired health and

performance benefits.

To address this challenge, investments in research and development are necessary to enhance probiotic formulation and production techniques. Additionally, appropriate packaging and storage conditions need to be implemented to preserve probiotic viability.

Cost Considerations

The cost of incorporating probiotics into animal feed can be relatively high, especially when compared to conventional feed additives like antibiotics. While the long-term benefits of probiotics in terms of improved animal health and productivity are well-established, the initial investment and operational costs can be a deterrent for some producers, particularly those operating with tight profit margins.

Industry stakeholders must work to demonstrate the return on investment (ROI) of using probiotics through rigorous research, case studies, and testimonials from producers who have experienced positive outcomes. Moreover, cost-effective production methods and competitive pricing by probiotic suppliers can help alleviate this challenge. It's also important to consider that as the probiotics market grows and economies of scale are realized, costs may become more competitive.

Key Market Trends

Rising Demand for Natural and Sustainable Solutions

One of the most prominent trends in the global probiotics in animal feed market is the increasing demand for natural and sustainable solutions in animal agriculture. Consumers are becoming more conscious of how their food is produced and are looking for products that align with ethical and sustainable practices. Probiotics are viewed as a natural, eco-friendly, and sustainable alternative to antibiotics and synthetic growth promoters. They support animal health and welfare without the potential drawbacks associated with conventional pharmaceuticals. As such, the trend toward natural and sustainable animal farming practices is driving the adoption of probiotics in animal feed.

Precision Livestock Farming and Data-Driven Solutions

The adoption of technology and data-driven solutions in animal farming is on the rise. Precision livestock farming (PLF) involves the use of various technologies, including

sensors, data analytics, and automation, to monitor and manage animal health, nutrition, and production. Probiotics are increasingly being integrated into PLF systems to enhance the health and performance of animals. Producers can monitor the effectiveness of probiotics and adjust their usage based on real-time data, optimizing their impact on animal health and productivity. This trend reflects a growing reliance on data-driven decision-making and precision in animal farming.

Expansion of Probiotic Product Portfolio

The global probiotics in animal feed market is witnessing a broadening of the probiotic product portfolio. Initially, probiotics were primarily used in poultry and swine production. However, there is a growing trend toward diversifying the use of probiotics to include various species such as cattle, aquaculture, and even companion animals. As research continues to explore the benefits of probiotics in different animal species, the market is expanding to cater to a wider range of customers. This trend represents an increased recognition of probiotics as a versatile solution for improving animal health and performance across various sectors of the animal farming industry.

Segmental Insights

Livestock Insights

Based on the category of Livestock, the Poultry segment emerged as the dominant player in the global market for Probiotics in Animal Feed in 2022. Poultry is one of the most consumed meats globally, and the demand for poultry meat and eggs is expected to continue to grow in the coming years. This rising demand is driving the need for probiotics in poultry feed to improve animal health and productivity.

Probiotics offer several benefits for poultry, including Improved gut health and nutrient absorption, Enhanced immune system function. Reduced risk of antibiotic-resistant bacteria. Increased feed efficiency and growth rate.

Probiotics have been widely adopted in poultry feed due to their proven benefits and cost-effectiveness. Poultry producers are increasingly recognizing the value of probiotics in improving animal health and performance. The regulatory environment for probiotics in poultry feed is generally favorable, with most countries allowing the use of probiotics without additional restrictions. Consumers are increasingly demanding organic and natural poultry products, and probiotics are a natural way to improve animal health and productivity. This trend is further driving the demand for probiotics in poultry

feed. These factors are expected to drive the growth of this segment.

Source Insight

Based on the category of Source, the bacterial segment emerged as the dominant player in the global market for Probiotics in Animal Feed in 2022. The bacterial segment has benefited from extensive research and development, leading to a better understanding of the specific strains of bacteria that are most beneficial for animal health and productivity. Bacterial probiotics have been shown to be effective in improving gut health, nutrient absorption, immune system function, and reducing the risk of antibiotic-resistant bacteria in animals. Bacterial probiotics are more widely available and generally less expensive than yeast and fungi probiotics, making them a more attractive option for animal producers. The regulatory environment for bacterial probiotics in animal feed is generally favorable, with most countries allowing the use of bacterial probiotics without additional restrictions. Consumers are increasingly demanding organic and natural probiotics for their animals, and bacterial probiotics are a natural source of beneficial microorganisms. This trend is further driving the demand for bacterial probiotics in animal feed. The bacterial segment is expected to maintain its dominance in the Global Probiotics in Animal Feed Market in the near future due to the continued research and development in this area, the proven effectiveness of bacterial probiotics, and the favorable regulatory environment. These factors are expected to drive the growth of this segment.

Form Insight

Based on the category of Form, the dry segment emerged as the dominant player in the global market for Probiotics in Animal Feed in 2022. Dry probiotics are easier to store and handle than liquid probiotics, making them a more convenient option for animal producers.

Dry probiotics have a longer shelf life than liquid probiotics, reducing the risk of product spoilage and waste. Dry probiotics are less bulky and lighter than liquid probiotics, resulting in lower transportation costs. Dry probiotics can be easily incorporated into various feed types, including pelleted, extruded, and mash feeds. Dry probiotics are generally compatible with other feed additives, allowing for the combination of probiotics with other beneficial ingredients in animal feed. The dry segment is expected to maintain its dominance in the Global Probiotics in Animal Feed Market in the near future due to the continued advantages of dry probiotics, such as ease of storage, handling, and compatibility with various feed types. However, the liquid segment is also expected

to experience significant growth in the coming years, driven by the increasing demand for high-potency probiotics and the potential benefits of liquid probiotics for specific animal species.

Distribution Channel Insights

The retail stores segment is projected to experience rapid growth during the forecast period. Retail stores offer a convenient and accessible way for animal producers to purchase probiotics. Farmers and pet owners can easily find and purchase probiotics at their local feed stores, pet stores, or agricultural retailers.

Retail stores typically carry a wide variety of probiotic products from different brands and manufacturers, allowing consumers to choose the product that best suits their needs. Retail stores often have knowledgeable staff members who can provide expert guidance and advice on selecting the right probiotics for specific animal species and health conditions. Retail stores often carry well-known and trusted brands of probiotics, giving consumers confidence in the quality and efficacy of the products they are purchasing. Retail stores often engage in marketing and promotional activities to raise awareness of probiotics and attract customers, further driving sales. The retail stores segment is expected to maintain its dominance in the Global Probiotics in Animal Feed Market in the near future due to the continued convenience, accessibility, and wide availability of products offered by retail channels. These factors collectively contribute to the growth of this segment.

Regional Insights

Asia Pacific emerged as the dominant player in the global Probiotics in Animal Feed market in 2022, holding the largest market share in terms of value. The Asia Pacific region boasts the world's largest population, with a rapidly growing middle class and increasing disposable income. This translates into a rising demand for meat and dairy products, leading to a higher demand for probiotics in animal feed. Animal production is expanding rapidly in Asia Pacific, particularly in countries like China, India, and Vietnam. This expansion is driven by factors such as favorable climatic conditions, government initiatives to promote agriculture, and increasing demand for locally produced animal products. Open-pollinated probiotic strains are widely preferred in Asia Pacific due to their cost-effectiveness, adaptability to local conditions, and cultural preferences. This preference drives the demand for open-pollinated probiotic animal feed. Several major seed companies are based in Asia Pacific, such as Yuanlongping High-Tech Agriculture Co. Ltd., Kaifeng Sunseeds Group Co., Ltd., and Beijing Dahua Seed Co., Ltd. These

companies contribute significantly to the region's market share. Asia Pacific is expected to maintain its dominance in the Global Probiotics in Animal Feed Market in the near future due to its vast population, expanding animal production, preference for open-pollinated varieties, and strong presence of seed companies.

The North America market is poised to be the fastest-growing market, offering lucrative growth opportunities for Probiotics in Animal Feed players during the forecast period. Factors such as increasing health concerns, a burgeoning senior population, rising healthcare spending, growing disposable income, and the emergence of local market players are expected to fuel market growth in the region. Additionally, improvements in the healthcare system, government subsidies facilitating the establishment of production facilities by industry giants, low labor costs, and easy access to raw materials are anticipated to further support the growth of the North America Probiotics in Animal Feed market.

Key Market Players

ADM Inc.

International Flavors & Fragrances Inc.

CHR. Hansen Holding A/S

Evonik Industries AG

DSM BV

Ohly GmbH

Alltech Inc.

Kemin Industries Inc.

Provita Animal Health

Lallemand Inc. Glanbia Plc

Report Scope:

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

Probiotics in Animal Feed Market, By Livestock:

Poultry

Swine

Ruminants

Aquaculture

Pets

Others

Probiotics in Animal Feed Market, By Source:

Bacteria

Yeast & Fungi

Probiotics in Animal Feed Market, By Form:

Dry

Liquid

Probiotics in Animal Feed Market, By Distribution Channel:

Retail Stores

Others

Probiotics in Animal Feed 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 Probiotics in Animal Feed Market.

Available Customizations:

Global Probiotics in Animal Feed 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).

Contents

1. ADM INC.

2. INTERNATIONAL FLAVORS & FRAGRANCES INC.

3. CHR. HANSEN HOLDING A/S

4. EVONIK INDUSTRIES AG

5. DSM BV

6. OHLY GMBH

7. ALLTECH INC.

8. KEMIN INDUSTRIES INC.

9. PROVITA ANIMAL HEALTH

10. LALLEMAND INC.GLANBIA PLC

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