

Water-Soluble Vitamins & Minerals in Feed Market – Global Industry Size, Share, Trends, Opportunity, & Forecast 2019-2029 Segmented By Vitamins Type (Vitamin B Complex, Vitamin C, Others), By Minerals Type (Phosphorus, Potassium, Calcium, Magnesium, Sodium, Iron, Others), By Feedstock (Swine, Poultry, Ruminants, Aquaculture), By Region, Competition

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Abstracts

Global Water-Soluble Vitamins & Minerals in Feed Market was valued at USD 4.38 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 7.13% through 2029. The Global Water-Soluble Vitamins & Minerals in Feed Market is experiencing growth driven by increasing demand for animal products, technological advancements, and a focus on animal welfare. The market's segmentation, regional variations, regulatory considerations, and key market players contribute to its dynamic and evolving nature.

Key Market Drivers

Increasing Livestock Production

Increasing livestock production serves as a significant market driver for the growth of the Global Water-Soluble Vitamins & Minerals in Feed Market. This trend is influenced by various factors that underscore the importance of animal nutrition in meeting the rising global demand for meat, dairy, and other animal-derived products. The world's population is continually growing, and with it comes an increased demand for protein-rich food sources. As more people transition towards diets that include greater quantities of meat and dairy, the pressure on the livestock industry intensifies. To meet

this demand sustainably, farmers and livestock producers are focusing on enhancing the productivity and efficiency of their operations, which in turn drives the need for advanced animal nutrition solutions.

Modern agricultural practices emphasize the need for efficient and productive livestock farming. Farmers are increasingly adopting intensive farming methods to maximize output while optimizing resources. In such systems, animal nutrition plays a pivotal role in ensuring rapid growth, improved feed conversion rates, and overall better performance. Water-soluble vitamins and minerals, being essential components of animal diets, are crucial in achieving these objectives, thus driving their demand in the market. With a growing awareness of ethical and sustainable farming practices, there is a heightened emphasis on animal welfare and health. Livestock producers recognize that the well-being of animals is directly linked to the quality of the products they yield. Water-soluble vitamins and minerals contribute to the health and vitality of animals, aiding in disease prevention and supporting overall immune function. This focus on animal welfare aligns with consumer preferences for ethically produced food products, driving the adoption of nutritional additives in livestock feed.

The globalization of the livestock trade has led to increased competition and a greater need for consistency in the quality of animal products. Livestock producers are under pressure to meet international standards and regulations to facilitate the smooth flow of trade. As a result, there is a growing inclination towards utilizing advanced feed additives, including water-soluble vitamins and minerals, to ensure that livestock meets the required quality and safety standards demanded by both domestic and international markets. Advancements in technology and agricultural practices have led to more sophisticated and efficient methods of animal husbandry. Precision farming, data analytics, and genetic improvements are becoming integral parts of modern livestock management. Water-soluble vitamins and minerals are incorporated into these technological advancements, playing a role in genetic development for improved resistance to diseases and enhanced growth rates, further boosting the demand for these additives.

Growing Awareness of Animal Health and Nutrition

The growing awareness of animal health and nutrition is a significant market driver propelling the growth of the Global Water-Soluble Vitamins & Minerals in Feed Market. This awareness is characterized by a heightened understanding among farmers, livestock producers, and consumers about the pivotal role that proper nutrition plays in the well-being and productivity of animals. Consumers are increasingly discerning about

the quality and safety of animal-derived products they consume. There is a rising demand for meat, dairy, and eggs that are not only produced ethically but are also nutritionally enriched. This shift in consumer preferences has led to greater scrutiny of animal farming practices and, in turn, an increased focus on the nutritional content of animal feed. Water-soluble vitamins and minerals play a crucial role in ensuring that animals receive the necessary nutrients for optimal health and, consequently, contribute to the production of high-quality animal products.

Farmers and livestock producers are becoming more aware of the negative impact of nutritional deficiencies on animal health and productivity. Deficiencies in essential vitamins and minerals can lead to various health issues, including stunted growth, weakened immune systems, and reproductive problems. As a result, there is a growing emphasis on incorporating water-soluble vitamins and minerals into animal diets to prevent and address these deficiencies, thereby promoting overall animal health and well-being. The global trend towards sustainable and responsible farming practices has brought animal nutrition into sharper focus. Livestock producers are recognizing the importance of providing animals with balanced and sustainable diets. Water-soluble vitamins and minerals contribute to the sustainability of animal farming by ensuring efficient nutrient utilization and minimizing waste. This aligns with the broader industry movement toward environmentally conscious and responsible agricultural practices.

The dissemination of information and education about animal nutrition has played a pivotal role in raising awareness. Agricultural extension services, research institutions, and industry associations are actively involved in educating farmers and livestock producers about the significance of proper nutrition in animal health. This educational effort includes highlighting the benefits of water-soluble vitamins and minerals in supporting various physiological functions in animals, leading to an increased adoption of these additives in animal feed. Governments and regulatory bodies are increasingly emphasizing animal welfare and the role of nutrition in ensuring the humane treatment of animals. This has led to the development of regulations that govern the nutritional requirements of animals in various stages of life. Compliance with these regulations often involves the use of specific additives, including water-soluble vitamins and minerals, to meet the prescribed nutritional standards and ensure the well-being of animals.

Technological Advancements in Animal Nutrition

Technological advancements in animal nutrition serve as a crucial market driver propelling the growth of the Global Water-Soluble Vitamins & Minerals in Feed Market.

These innovations encompass various aspects of feed formulation, delivery systems, and precision farming practices, aiming to optimize nutrient utilization and enhance the overall health and performance of livestock.

Ongoing research and development efforts within the field of animal nutrition have led to the creation of advanced formulations of water-soluble vitamins and minerals. These formulations are designed to improve the bioavailability of nutrients, ensuring that animals can efficiently absorb and utilize the vitamins and minerals provided in their feed. Enhanced bioavailability contributes to better health, growth, and reproductive performance in livestock, driving the adoption of these technologically advanced additives. Microencapsulation and coating technologies have revolutionized the delivery of water-soluble vitamins and minerals in animal feed. These techniques involve encapsulating individual nutrient particles, protecting them from degradation and improving their stability during feed processing and storage. This innovation ensures that the vitamins and minerals reach the target sites in the animal's digestive system intact, maximizing their effectiveness and allowing for precise control over nutrient release. The integration of precision farming practices and data-driven approaches has significantly impacted animal nutrition. Farmers and livestock producers now use sophisticated technologies to monitor and analyze the nutritional needs of individual animals or groups. This precision allows for tailored nutrition programs, where water-soluble vitamins and minerals can be administered in optimal amounts based on specific requirements, contributing to improved efficiency, growth rates, and resource utilization.

Advances in genetic modification techniques have enabled the development of livestock with enhanced nutrient utilization capabilities. Animals can be genetically engineered to express traits that improve their ability to absorb and utilize water-soluble vitamins and minerals from their feed. This approach contributes to improved overall health, productivity, and feed efficiency, driving the demand for specialized feed formulations that complement these genetic advancements. The advent of smart feeding technologies involves the use of sensors, data analytics, and automation to optimize feeding processes. These technologies can monitor animal behavior, health parameters, and nutrient intake in real-time. By utilizing smart feeding systems, farmers can dynamically adjust the composition of animal feed, including water-soluble vitamins and minerals, based on the specific needs and conditions of the livestock, resulting in more precise and efficient nutrient delivery.

Stringent Regulations and Quality Standards

Stringent regulations and quality standards play a pivotal role as a market driver, propelling the growth of the Global Water-Soluble Vitamins & Minerals in Feed Market. These regulations are imposed by government bodies and industry organizations to ensure the safety, efficacy, and quality of animal feed, subsequently driving the demand for additives such as water-soluble vitamins and minerals. Regulatory bodies worldwide are increasingly focused on ensuring the safety of food products derived from animals. Stringent regulations are established to guarantee that animal feed ingredients, including water-soluble vitamins and minerals, meet specified safety standards. Compliance with these regulations is crucial for livestock producers to ensure that the resulting animal products are safe for human consumption. The emphasis on safety acts as a strong driver, compelling the industry to adopt high-quality feed additives that meet regulatory requirements.

Stringent regulations aim to prevent contamination and adulteration of animal feed, safeguarding both animal and human health. Water-soluble vitamins and minerals, being essential components of animal nutrition, must adhere to strict quality standards to prevent any potential contamination that could compromise the health of livestock. Compliance with regulations ensures the purity of these additives, fostering confidence among farmers and producers in their use. Regulatory frameworks often mandate traceability and transparency in the supply chain, requiring manufacturers to provide documentation and information on the origin and quality of feed ingredients. This focus on traceability helps identify and address potential issues in the supply chain, ensuring that water-soluble vitamins and minerals are sourced and processed responsibly. Enhanced traceability builds trust among stakeholders and encourages the adoption of feed additives that meet stringent quality standards.

In an era of globalized markets, international trade in agricultural products is subject to harmonized standards and regulations. Many countries and regions are moving towards aligning their standards with international norms. To facilitate trade, livestock producers must adhere to these harmonized standards, creating a global demand for feed additives that meet the specified quality criteria. Water-soluble vitamins and minerals complying with these international standards gain broader market acceptance and contribute to the growth of the industry. Some regulations are designed to promote ethical farming practices and animal welfare. Compliance with these regulations may involve the use of specific feed additives, such as water-soluble vitamins and minerals, to ensure that animals receive the necessary nutrients for their well-being. Ethical farming practices are increasingly recognized as essential, and adherence to these standards contributes to the market growth of feed additives that support animal health and nutrition.

Key Market Challenges

Cost Constraints and Affordability

The significant challenge is the cost associated with incorporating water-soluble vitamins and minerals into animal feed. These additives, being specialized and often requiring advanced formulations or delivery systems, can be relatively expensive. Farmers and livestock producers, particularly in regions with price-sensitive markets, may be hesitant to invest in premium feed additives due to concerns about affordability. This challenge is exacerbated when economic conditions are unfavorable, leading to potential resistance in the adoption of water-soluble vitamins and minerals, despite their proven benefits in animal nutrition.

Lack of Awareness and Education

Another obstacle to market growth is the lack of awareness and education among farmers and livestock producers regarding the benefits of water-soluble vitamins and minerals. In some regions or among certain segments of the agricultural community, there may be limited understanding of the importance of these additives in animal nutrition. Insufficient knowledge about the role of water-soluble vitamins and minerals in enhancing animal health, growth, and reproduction can result in a reluctance to invest in these feed additives. Efforts to educate and raise awareness among stakeholders are essential to overcome this challenge and promote the widespread adoption of these nutrients.

Regulatory Hurdles and Compliance Issues

The regulatory environment can pose challenges for the water-soluble vitamins and minerals market. Stringent regulations, while driving market growth as a positive driver, can also create hurdles, especially for smaller manufacturers or those operating in regions with complex and rigorous regulatory frameworks. Compliance with evolving standards and ensuring that products meet the varying requirements across different jurisdictions can be a time-consuming and resource-intensive process. Navigating regulatory hurdles may slow down the introduction of new products or hinder market entry for some players.

Key Market Trends

Rising Demand for Functional and Fortified Animal Feed

A significant trend driving the growth of the market is the increasing demand for functional and fortified animal feed. As awareness of the impact of nutrition on animal health and productivity grows, there is a corresponding surge in the demand for feed formulations that go beyond basic nutritional requirements. Water-soluble vitamins and minerals, being essential for various physiological functions, are becoming integral components of fortified feed. This trend is particularly pronounced in the poultry, swine, and aquaculture sectors where optimizing growth rates, reproductive performance, and overall health are paramount.

Manufacturers in the water-soluble vitamins and minerals market are adapting to this trend by developing specialized formulations that address specific health and performance concerns in different animal species. The trend towards functional and fortified feed is likely to fuel innovation in product development to meet the evolving needs of the livestock industry.

Growing Emphasis on Sustainable and Organic Farming Practices

The global movement towards sustainable and organic farming practices is influencing the choices made in animal nutrition. Consumers and regulatory bodies are placing greater importance on environmentally friendly and ethically produced animal products. This shift is reflected in the demand for feed additives that align with sustainable farming principles. Water-soluble vitamins and minerals, when sourced responsibly and incorporated into feed formulations that minimize environmental impact, are gaining popularity in line with this sustainability trend.

Companies operating in the water-soluble vitamins and minerals market are increasingly focusing on sustainable sourcing practices, eco-friendly packaging, and providing transparent information about the environmental footprint of their products. The trend towards sustainable and organic farming is likely to drive the development of eco-friendly alternatives and contribute to the market's growth.

Technological Integration and Precision Nutrition

The integration of technology and precision farming practices is a notable trend in animal nutrition, including the use of water-soluble vitamins and minerals. Advanced technologies, such as sensors, data analytics, and artificial intelligence, are being employed to monitor and analyze the nutritional needs of individual animals or specific

groups. This precision nutrition approach allows for the customization of diets, including precise dosages of water-soluble vitamins and minerals, based on real-time data and specific requirements.

Companies in the water-soluble vitamins and minerals market are adapting to this trend by incorporating smart technologies into their products, such as microencapsulation for controlled release and precision delivery systems. The trend towards technological integration in animal nutrition is expected to continue, with a focus on improving efficiency, reducing waste, and maximizing the impact of feed additives.

Segmental Insights

Vitamins Type Insights

Based on the category of Vitamin Type, the Vitamin B Complex segment emerged as the dominant player in the global market for Water-Soluble Vitamins & Minerals in Feed in 2023. B vitamins play a crucial role in various metabolic processes in animals, including energy production, nerve function, and cell growth. They are essential for maintaining optimal health, growth, and productivity.

The B complex is a group of eight individual vitamins, each with specific functions. This variety ensures that animals receive a complete spectrum of B vitamins to support their diverse metabolic needs. B vitamins are required by all animal species, from poultry and swine to fish and ruminants. This broad demand across different livestock sectors contributes to the overall market size for B complex vitamins in feed.

Animals have limited capacity to synthesize B vitamins internally, making dietary supplementation through feed essential. This dependence on external sources further strengthens the demand for B complex vitamins in the feed market. Compared to other vitamins, B complex is generally considered cost-effective, making it a viable option for feed producers and farmers. This affordability further supports its widespread adoption in animal feed formulations. These factors are expected to drive the growth of this segment.

Mineral Type Insight

Based on the category of Mineral Type, the Potassium segment emerged as the dominant player in the global market for Water-Soluble Vitamins & Minerals in Feed in 2023. Potassium plays a crucial role in maintaining proper muscle function, nerve

transmission, and fluid balance in animals. It also aids in feed utilization and energy production, ultimately impacting animal growth and performance.

Similar to Vitamin B complex, potassium is essential for all livestock species. This broad demand across poultry, swine, ruminants, and fish contributes significantly to its overall market share in the feed sector. Animals have limited capacity to synthesize potassium efficiently, making dietary supplementation through feed crucial. This dependence on external sources further strengthens the demand for potassium in animal feed formulations. Potassium is generally considered a cost-effective mineral compared to others, making it an attractive option for feed producers and farmers. Additionally, its versatility allows for inclusion in various feed types and formulations, further boosting its market presence. Potassium interacts synergistically with other essential nutrients like sodium and magnesium, enhancing their overall effectiveness in maintaining animal health and performance. This interplay further strengthens the value proposition of potassium in feed.

Feed Stock Insights

The Swine segment is projected to experience rapid growth during the forecast period. Swine are the most populous livestock species globally, with China alone accounting for over half of the world's pigs. This large and growing population naturally translates into a high demand for feed additives, including water-soluble vitamins and minerals.

Modern swine farming relies heavily on intensive production systems, where animals are housed in confined spaces with controlled environments. This dependence on formulated feed to meet all nutritional needs creates a significant market for water-soluble vitamins and minerals to ensure optimal health and performance in these high-yielding animals.

Swine have unique digestive systems and specific requirements for various water-soluble vitamins and minerals. For example, their limited ability to synthesize Vitamin C necessitates supplementation, and they have a high demand for phosphorus for bone development and growth. The swine industry prioritizes preventing diseases and promoting rapid growth for economic viability. Water-soluble vitamins and minerals play a crucial role in supporting immune function, stress response, and overall health, contributing to disease resistance and faster growth rates. The swine feed market is well-established and cost sensitive. Compared to other segments, the swine feed industry has a longer history of utilizing water-soluble vitamins and minerals, leading to efficient production and cost-effective options for feed producers. These factors

collectively contribute to the growth of this segment.

Regional Insights

Asia-Pacific emerged as the dominant player in the global Water-Soluble Vitamins & Minerals in Feed market in 2023, holding the largest market share in terms of value. The region boasts a rapidly growing population with a rising appetite for animal protein, particularly poultry and swine. This translates into a massive demand for efficient feed and essential nutrients like water-soluble vitamins and minerals. Many Asian governments actively incentivize animal agriculture development, leading to increased investments in feed production and technological advancements. This fosters a conducive environment for market growth. Asian feed producers are highly cost-conscious, which drives the adoption of cost-effective water-soluble vitamin and mineral blends tailored to specific regional needs. With high animal density in farms, disease prevention becomes crucial. Water-soluble vitamins and minerals play a vital role in boosting immune function and reducing disease outbreaks, contributing to overall profitability.

The Europe market is poised to be the fastest-growing market, offering lucrative growth opportunities for Water-Soluble Vitamins & Minerals in Feed players during the forecast period. Factors such as European consumers and producers prioritize sustainable practices, leading to the exploration of alternative sources like plant-based minerals and algae-derived vitamins. This opens new avenues for market growth. Europe is at the forefront of precision agriculture, incorporating data analysis to optimize feed formulations and target specific nutrient deficiencies. This personalized approach drives demand for individual water-soluble vitamins and minerals. Stringent regulations ensure the safety and efficacy of feed additives, fostering trust and confidence among consumers and contributing to market stability.

Key Market Players

Lonza Group

Koninklijke DSM N.V.

Nutreco N.V.

BASF SE

Archer Daniels Midlands Company

Dansk Landbrugs Grovvarereselskab

Neovia Group

Report Scope:

In this report, the Global Water-Soluble Vitamins & Minerals in Feed Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Water-Soluble Vitamins & Minerals in Feed Market, By Vitamins Type:

Vitamin B Complex

Vitamin C

Others

Water-Soluble Vitamins & Minerals in Feed Market, By Minerals Type:

Phosphorus

Potassium

Calcium

Magnesium

Sodium

Iron

Others

Water-Soluble Vitamins & Minerals in Feed Market, By Feedstock:

Swine

Poultry

Ruminants

Aquaculture

Water-Soluble Vitamins & Minerals in 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

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Water-Soluble Vitamins & Minerals in Feed Market.

Available Customizations:

Global Water-Soluble Vitamins & Minerals in Feed 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 Sources
- 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 WATER-SOLUBLE VITAMINS & MINERALS IN FEED MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Vitamins Type (Vitamin B Complex, Vitamin C, Others)
 - 5.2.2. By Minerals Type (Phosphorus, Potassium, Calcium, Magnesium, Sodium, Iron, Others)

- 5.2.3. By Feedstock (Swine, Poultry, Ruminants, Aquaculture)
- 5.2.4. By Region
- 5.2.5. By Company (2023)
- 5.3. Market Map

6. NORTH AMERICA WATER-SOLUBLE VITAMINS & MINERALS IN FEED MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Vitamins Type
 - 6.2.2. By Minerals Type
 - 6.2.3. By Feedstock
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type
 - 6.3.1.2.2. By Minerals Type
 - 6.3.1.2.3. By Feedstock
 - 6.3.2. Canada Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type
 - 6.3.2.2.2. By Minerals Type
 - 6.3.2.2.3. By Feedstock
 - 6.3.3. Mexico Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type
 - 6.3.3.2.2. By Minerals Type
 - 6.3.3.2.3. By Feedstock

7. EUROPE WATER-SOLUBLE VITAMINS & MINERALS IN FEED MARKET

OUTLOOK

7.1. Market Size & Forecast

7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Vitamins Type

7.2.2. By Minerals Type

7.2.3. By Feedstock

7.2.4. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type

7.3.1.2.2. By Minerals Type

7.3.1.2.3. By Feedstock

7.3.2. United Kingdom Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type

7.3.2.2.2. By Minerals Type

7.3.2.2.3. By Feedstock

7.3.3. Italy Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type

7.3.3.2.2. By Minerals Type

7.3.3.2.3. By Feedstock

7.3.4. France Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type

7.3.4.2.2. By Minerals Type

7.3.4.2.3. By Feedstock

7.3.5. Spain Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type
 - 7.3.5.2.2. By Minerals Type
 - 7.3.5.2.3. By Feedstock

8. ASIA-PACIFIC WATER-SOLUBLE VITAMINS & MINERALS IN FEED MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Vitamins Type
 - 8.2.2. By Minerals Type
 - 8.2.3. By Feedstock
 - 8.2.4. By Country
- 8.3. Asia-Pacific: Country Analysis
 - 8.3.1. China Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type
 - 8.3.1.2.2. By Minerals Type
 - 8.3.1.2.3. By Feedstock
 - 8.3.2. India Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type
 - 8.3.2.2.2. By Minerals Type
 - 8.3.2.2.3. By Feedstock
 - 8.3.3. Japan Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type
 - 8.3.3.2.2. By Minerals Type
 - 8.3.3.2.3. By Feedstock

8.3.4. South Korea Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type

8.3.4.2.2. By Minerals Type

8.3.4.2.3. By Feedstock

8.3.5. Australia Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type

8.3.5.2.2. By Minerals Type

8.3.5.2.3. By Feedstock

9. SOUTH AMERICA WATER-SOLUBLE VITAMINS & MINERALS IN FEED MARKET OUTLOOK

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast

9.2.1. By Vitamins Type

9.2.2. By Minerals Type

9.2.3. By Feedstock

9.2.4. By Country

9.3. South America: Country Analysis

9.3.1. Brazil Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type

9.3.1.2.2. By Minerals Type

9.3.1.2.3. By Feedstock

9.3.2. Argentina Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type

9.3.2.2.2. By Minerals Type

- 9.3.2.2.3. By Feedstock
- 9.3.3. Colombia Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type
 - 9.3.3.2.2. By Minerals Type
 - 9.3.3.2.3. By Feedstock

10. MIDDLE EAST AND AFRICA WATER-SOLUBLE VITAMINS & MINERALS IN FEED MARKET OUTLOOK

- 10.1. Market Size & Forecast
 - 10.1.1. By Value
- 10.2. Market Share & Forecast
 - 10.2.1. By Vitamins Type
 - 10.2.2. By Minerals Type
 - 10.2.3. By Feedstock
 - 10.2.4. By Country
- 10.3. MEA: Country Analysis
 - 10.3.1. South Africa Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type
 - 10.3.1.2.2. By Minerals Type
 - 10.3.1.2.3. By Feedstock
 - 10.3.2. Saudi Arabia Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type
 - 10.3.2.2.2. By Minerals Type
 - 10.3.2.2.3. By Feedstock
 - 10.3.3. UAE Water-Soluble Vitamins & Minerals in Feed 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 Vitamins Type

10.3.3.2.2. By Minerals Type

10.3.3.2.3. By Feedstock

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 WATER-SOLUBLE VITAMINS & MINERALS IN FEED MARKET: SWOT ANALYSIS

14. COMPETITIVE LANDSCAPE

14.1. Lonza Group

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 (If Listed)

14.2. Koninklijke DSM N.V.

14.3. Nutreco N.V.

14.4. BASF SE

14.5. Archer Daniels Midlands Company

14.6. Dansk Landbrugs Grovvarereselskab

14.7. Neovia Group

15. STRATEGIC RECOMMENDATIONS

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