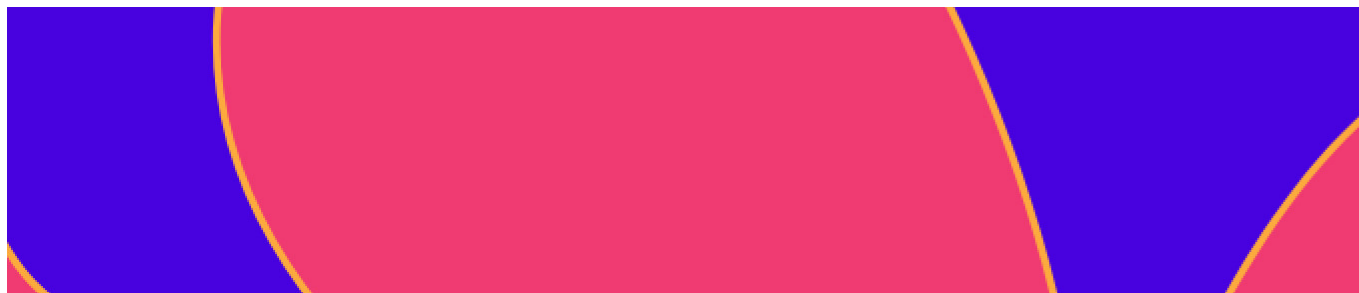




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# European Postbiotic Feed Additives Market to Reach USD 0.18 Billion by 2035, Growing at 5–6% CAGR - FMI



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*Growth driven by poultry, swine, and aquaculture sectors, with bacterial-derived postbiotics capturing over 50% market share.”*

The global Postbiotic Feed Additives Market is set for substantial growth over the next decade, presenting lucrative opportunities for feed manufacturers, integrators, and suppliers targeting poultry, swine, aquaculture, and ruminant sectors. Valued at USD 0.36 billion in 2025, the market is projected to reach USD 0.64 billion by 2035, marking a robust 77.9% growth over the decade, with a compound annual growth rate (CAGR) of 6.1%. This near 1.8X increase in market size highlights the rising importance of postbiotics as sustainable, antibiotic-free alternatives in modern animal nutrition.

## Key Market Highlights:

- Market Value (2025): USD 0.36 billion
- Forecast Value (2035): USD 0.64 billion
- Forecast CAGR (2025–2035): 6.1%
- Leading Segment (2025): Inactivated Microbial Cells (17.8%)
- Key Growth Regions: North America, Asia-Pacific, Europe
- Top Industry Players: Cargill, ADM, Evonik Industries, Kerry Group, Royal DSM-Firmenich, Novus International, Alltech, Adisseo, Lallemand Animal Nutrition, Arm & Hammer Animal and Food Production

## Market Growth Dynamics

The Postbiotic Feed Additives Market is witnessing adoption across multiple livestock applications due to increasing restrictions on antibiotic growth promoters (AGPs) and rising demand for gut-health-enhancing additives. The first half of the forecast period (2025–2030) will see the market grow from **USD 0.36 billion to USD 0.49 billion**, representing **46.4% of total decade growth**. This phase is characterized by steady adoption in **poultry and swine feed**, with **inactivated microbial cells** dominating at 17.8% share, offering cost-effective, stable, and proven solutions.

The second half of the decade (2030–2035) is projected to contribute **USD 0.15 billion**, as the market accelerates to USD 0.64 billion. Growth will be driven by integration of **metabolite-based postbiotics, cell-free supernatants, and fermentation extracts** into diverse livestock diets, with specialty blends combining postbiotics, probiotics, and organic acids creating new adoption pathways. By 2035, **North America (30%) and Europe (28%)** will lead regional demand, bolstered by regulatory mandates and sustainable livestock production initiatives.

## Market Evolution and Competitive Landscape

Between 2020 and 2024, the postbiotic market expanded steadily, led by multinational feed additive suppliers controlling **70–75% of revenues**. Key players, including **Cargill, DSM-Firmenich, and Evonik**, focused on large-scale microbial fermentation and cost-efficient formulations. Differentiation was achieved through **microbial strain diversity, encapsulation efficiency, and integration into premixes**, while plant- and yeast-derived solutions remained supplementary. Service-driven adoption, including feed mill consulting and on-farm inclusion programs, accounted for less than 10% of total market value.

Looking forward, demand is shifting toward **specialty blends** and **hybrid portfolios** that integrate gut health,

immunity, and performance enhancement. Regional players in **Asia-Pacific** are gaining share, particularly in poultry and aquaculture feed, reflecting a move from single-function solutions toward **ecosystem-based postbiotic programs**.

### Drivers of Market Growth

Advances in **microbial fermentation and encapsulation technologies** are enhancing postbiotic stability, functionality, and delivery. **Inactivated microbial cells** remain popular due to their effectiveness in improving gut health and immunity without the risks associated with live probiotics. Emerging solutions, including **metabolite-based postbiotics, cell-free supernatants, and short-chain fatty acids**, are being integrated into precision feeding programs to optimize nutrient absorption, control pathogens, and enhance growth performance.

### Segment Analysis

The market is segmented by **type, source, functionality, livestock type, delivery format, application method, sales channel, and region**:

- **By Type:** Inactivated microbial cells lead with 17.8% share, followed by heat-killed probiotics (14.6%) and metabolite-based postbiotics (12.8%).
- **By Source:** Bacterial-derived postbiotics dominate at 54.2%, with yeast/fungal-derived at 28.4%.
- **By Functionality:** Gut health improvement leads with 26.4%, followed by immunity enhancement (21.3%) and pathogen control (18.5%).
- **By Livestock:** Poultry leads adoption, with aquaculture and swine experiencing strong growth in Asia-Pacific.
- **By Delivery Format:** Dry powders, encapsulated forms, and liquid concentrates are commonly used, with encapsulation gaining prominence for stability and targeted release.

### Regional Market Insights

- **United States:** Projected to grow at 5.1% CAGR, reaching **USD 154.7 million by 2035**, with focus on poultry and swine integrators adopting encapsulated bacterial-derived postbiotics.
- **United Kingdom:** Expected CAGR of 6.2%, driven by antibiotic-free production standards and export-focused integrators.
- **India:** Forecast CAGR of 5.2%, fueled by poultry and aquaculture adoption, government-backed antibiotic reduction mandates, and tier-2/3 feed mill integration.
- **China:** Fastest-growing at 6.3% CAGR, driven by regulatory restrictions on AGPs, large-scale poultry/swine production, and aquaculture feed adoption.
- **Germany & Europe:** CAGR around 5–6%, supported by stringent EU animal welfare regulations and integration into functional feed blends.
- **Japan & South Korea:** Emerging markets with 2–3% global share, led by bacterial-derived postbiotics and functional blends for gut health, immunity, and pathogen control.

### Competitive Landscape and Key Developments

The market remains moderately fragmented, with a mix of global leaders, mid-sized innovators, and regional specialists. Major players, including **Cargill, ADM, DSM-Firmenich, and Evonik Industries**, leverage large-scale fermentation, advanced microbial platforms, and integrated distribution networks. Mid-sized players, such as **Kerry Group, Novus International, and Adisseo**, focus on species-specific solutions, metabolite-based postbiotics, and encapsulated yeast derivatives. Regional specialists like **Lallemand Animal Nutrition** and **Arm & Hammer** offer customized postbiotic programs targeting local livestock challenges.

### Recent Developments:

- **March 5, 2024:** **Cargill** expanded its U.S. fermentation facility to increase bacterial-derived postbiotic production for heat-stable poultry and swine feed solutions.
- **July 22, 2024:** **Royal DSM-Firmenich** launched a metabolite-based postbiotic in Europe to enhance nutrient absorption and gut health in monogastric animals, aligning with EU sustainability mandates.

### Market Drivers and Challenges

- **Drivers:** Rising regulatory push toward **antibiotic-free nutrition**, advances in **fermentation technology**, and increasing demand in poultry, swine, and aquaculture sectors.

- **Challenges:** Limited **standardization in efficacy validation**, fragmented adoption in cost-sensitive markets, and need for robust, evidence-backed trials to secure trust among feed formulators.

## Outlook for Manufacturers and Stakeholders

The postbiotic feed additives market offers **high-value opportunities for manufacturers, integrators, and research-driven innovators**. With proven benefits in **gut health, immunity, pathogen control, and growth performance**, postbiotics are becoming central to sustainable livestock nutrition strategies. Manufacturers integrating **specialty blends, encapsulation technologies, and precision nutrition programs** are likely to gain a competitive edge.

The market's growth is underpinned by increasing regulatory mandates, consumer preference for **antibiotic-free meat**, and advances in **microbial fermentation and metabolite-based technologies**. Companies investing in **evidence-backed efficacy studies**, tailored feed inclusion programs, and multifunctional postbiotic solutions are expected to capture significant market share over the coming decade.

## Conclusion

As the global livestock industry moves toward **sustainable, high-performance, and antibiotic-free production**, the **Postbiotic Feed Additives Market** is emerging as a vital sector for innovation and investment. From North America to Asia-Pacific, stakeholders are embracing postbiotics to optimize **feed efficiency, gut health, and animal resilience**, signaling a transformative decade ahead for the global feed additive landscape.

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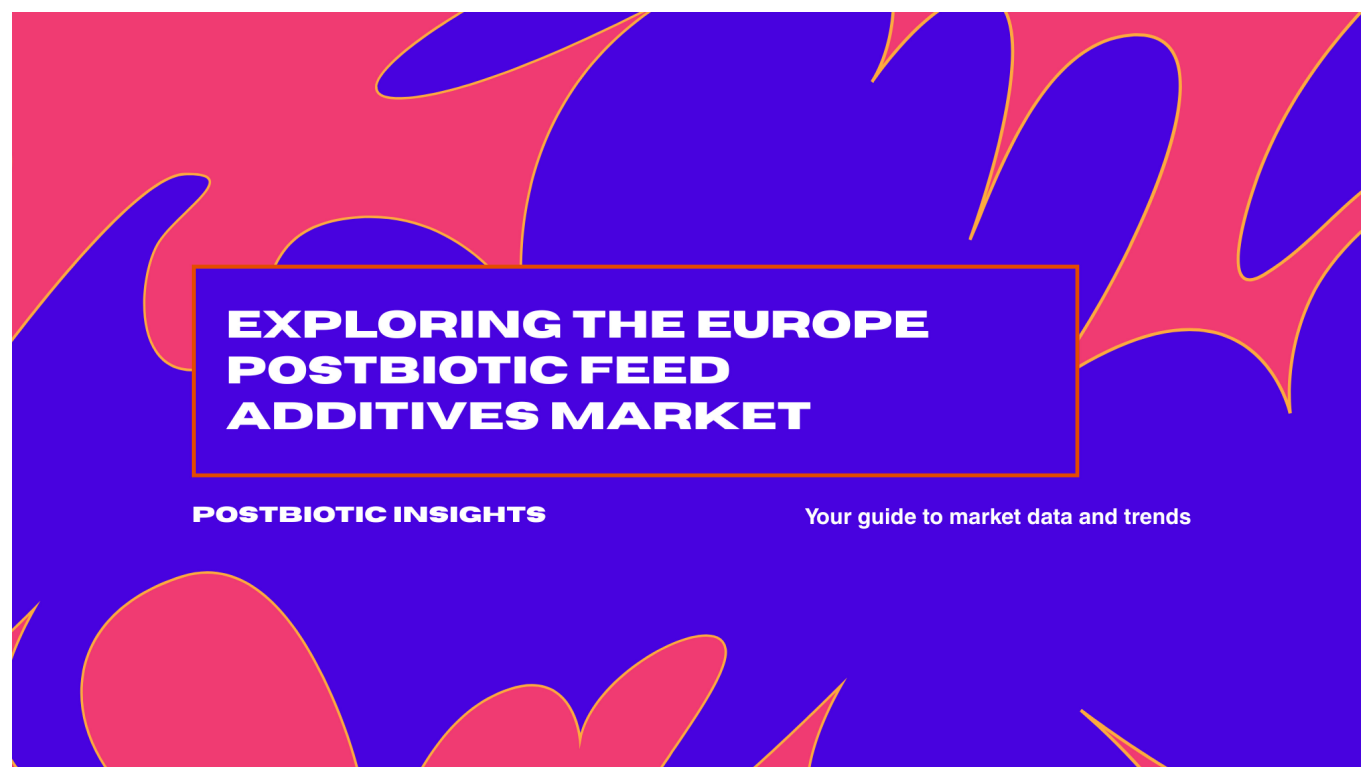
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