Найбільшими постачальниками комбікормів для домашніх тварин на світовий і український ринки є фірми Mars, Nestle, Ralston Purina, H. J. Heinz, Hill's та ін. Представлено дані з динаміки світового ринку кормів та темпами зростання за підсумками 2020-2023 років. Експерти прогнозують, що збільшенню ринку комбікормів для домашніх тварин сприяє стабільне економічне зростання, прогнозоване в багатьох розвинених країнах і країнах, що розвиваються, до 2027 року обсяг досягне вже $534,36 млрд за середньорічного зростання на 7,6%. З вітчизняних виробників кормів для домашніх тварин основним виробником є компанія «Кормотех», які виготовляють як сухі так і вологі комбікорми для домашніх тварин. Наведено основні переваги та недоліки вологих комбікормів для домашніх тварин. Проаналізовані зміни у вартості основних кормових засобів і добавок для виробництва комбікормів для домашніх тварин за 2020-2023 роки, а також середні ціни на вологі комбікорми для домашніх тварин в залежності від класу станом на 2023 рік, які становлять в межах 124…470 грн/кг. Висвітлено основні фактори, що впливають на формування міцної бази для виробництва кормів для тварин вітчизняного походження. Проаналізовано тенденції та визначено основні напрями подальшого розвитку. Визначено, що існування багатьох нез'ясованих питань створює об'єктивну необхідність для вивчення вітчизняного ринку кормів для домашніх тварин і формування попиту на ньому. Встановлено, що розробка пропозиції задля формування ринкового портфеля вітчизняних виробників корму для домашніх тварин сприятиме не лише покращенню рівня конкурентоздатності існуючих підприємств галузі, але й сприятиме появі нових вітчизняних підприємств.

Ключові слова: домашні тварини, повнораціонні комбікорми, дієтичні корми, сухі корми, вологі корми, кормова сировина, кормові добавки.

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GLOBAL FEED PRODUCTION DOWN SLIGHTLY IN 2023. P.1

Alltech's Agri-Food Outlook estimates that global feed tonnage totaled 1.287 billion metric tons (BMT) in 2023, a decrease of 2.6 million metric tons (MMT) — or 0.2% from 2022*.

The **overall lower demand** for feed was due, in part, to the **more efficient use of feed** made possible by intensive production systems that focus on using animal nutrition, farm management and other technologies to lower feed intake while producing the same amount of protein, or more. Another factor is a **slowdown in the overall production of animal protein** in response to tight margins experienced by many feed and animal protein companies.

Changing consumption patterns caused by inflation and dietary trends, **higher production costs**, and **geopolitical tensions** also influenced 2023 feed production.

Alltech's annual feed survey, now in its 13th year, includes data from 142 countries and more than 27,000 feed mills. It assesses compound feed production and prices by utilizing information collected by Alltech's global sales team and in partnership with local feed associations.

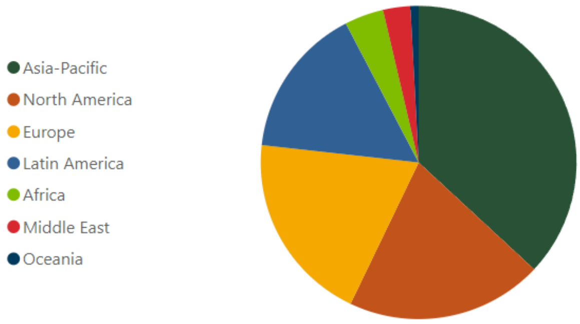
Feed production in 2023 increased in **Asia-Pacific** by 6.5 MMT (1.4%), **Latin America** by 2.5 MMT (1.22%), **Africa** by 1 MMT (1.9%) and **Oceania** by 0.4 MMT (3.7%). Feed production decreased in **Europe** (-3.8%) and **North America** (-1.1%).

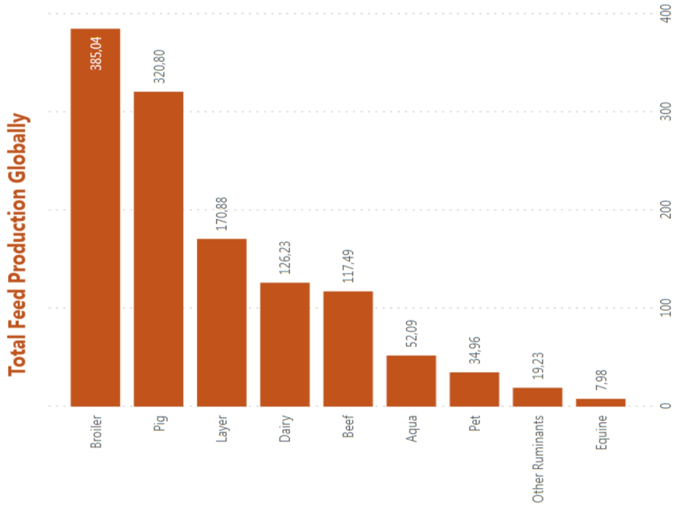
Globally, increases in feed tonnage were reported in the **broiler**, **layer** and **pet** sectors, while decreases were reported in the pig, dairy, beef, aqua and equine sectors.

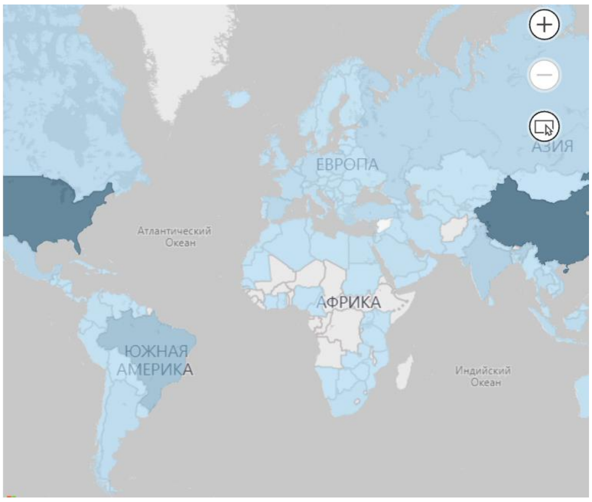
Region	Total Feed Tonnage	Change from 2022
Asia-Pacific	475,33	1,4%
North America	259,26	-1,1%
Europe	253,19	-3,8%
Latin America	200,67	1,2%
Africa	51,42	1,9%
Middle East	35,93	-0,3%
Oceania	10,78	3,7%
Всего	**1 286,58**	**-0,2%**

*All numbers are in million metric tons

2023 Feed Tonnage by Region







LAYERS

The global poultry feed industry is expanding, though slower than before. The layer sector saw a 0.01% increase in 2023, driven by efforts to enhance feed efficiency and adapt to dietary trends. Some markets around the globe were significantly impacted by macroeconomic challenges and disease outbreaks, which can disrupt production cycles. Still, the general outlook for the layer industry remains positive, thanks to its resilience in the face of difficult circumstances when other protein sectors often struggle to adapt.

Africa and the Middle East: The layer sector grew marginally in the Middle East but shrunk significantly in Africa in 2023. This decline was connected to disease outbreaks — particularly those related to avian influenza, which can set producers back financially while also impacting the overall bird supply.

Asia-Pacific: Despite the previous year's downward trend, the layer sector rebounded in Asia-Pacific in 2023. Layer feed tonnage grew steadily there, by 1.3 MMT, thanks in part to major increases in countries like India. New layer farms continue to open across the region.

Europe: The European layer sector was negatively impacted by the outbreak of avian influenza and other challenges, but with vaccines being field-tested in various countries, producers are hopeful about the year ahead.

Latin America: Layer feed tonnage was down slightly (0.17 MMT) in Latin America due, in large part, to the effects of highly pathogenic avian influenza (HPAI), which has decimated the region's bird inventory. Much attention is being paid to Brazil, the world's largest exporter of poultry, as the presence of HPAI in that country's commercial layer farms can have ripple effects across the global supply chain.

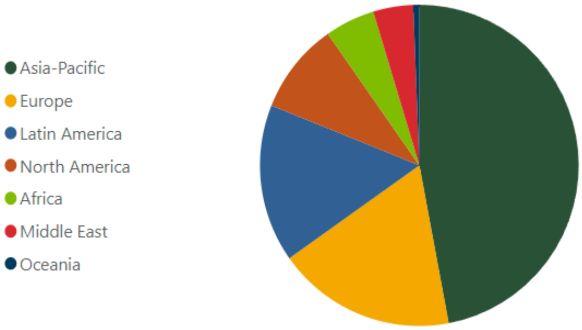
North America: The North American layer sector saw a 1% increase in feed tonnage this year, which correlated to a similar rise in the number of layer birds in the region.

Oceania: The layer sector grew by 3.5% — up 5% in Australia but was down by 2.9% in New Zealand.

Year	2023	
Region	**Total Feed Tonnage**	**% Change from 2022**
Asia-Pacific	80,40	1,7%
Europe	30,98	-1,1%
Latin America	27,16	-0,6%
North America	15,70	1,1%
Africa	8,65	-10,8%
Middle East	6,94	0,4%
Oceania	1,04	3,5%
Всего	**170,88**	**0,0%**

*All numbers are in million metric tons

2023 Feed Tonnage by Region



BROILERS

Broiler feed now accounts for 29.9% of the global total feed tonnage, with a slight 3.5% increase in 2023. Despite uneven growth across regions, the poultry sector is set to remain robust in 2024 due to regional successes and global market dynamics. Factors contributing to this resilience include lower input costs, like feed and energy, alongside improved margins and profitability. Changing consumer preferences, driven by economic shifts, favor affordable protein options, with poultry being a preferred choice.

Africa and the Middle East: These regions reported a substantial 12.8% growth in feed production for broilers in 2023, reflecting the resilience and adaptability of the agri-food industry there.

Asia-Pacific: Broiler feed tonnage increased in this region (by 4.6% YOY). Though the region has been challenged by animal disease, the soaring costs of raw materials and profits falling below expectations. Still, optimism for 2024 remains —particularly in Southern Asia, where India saw a 24.57% increase in broiler feed tonnage.

Europe: Total poultry feed production was down in Europe in 2023 by 1.86 million metric tons (MMT). Many markets were recovering from the impact of avian influenza, while others — including Denmark, Hungary and Portugal — struggled due to a decline in broiler production that led to challenges for local slaughterhouses.

Latin America: Latin America's poultry industry is thriving, with a 2.6% growth (representing 1.9 MMT) in broiler feed production there in 2023. An export-driven market, the Latin American broiler industry has benefited from its highly efficient production and the reduced costs of feeding birds there, which strengthen the region's competitiveness.

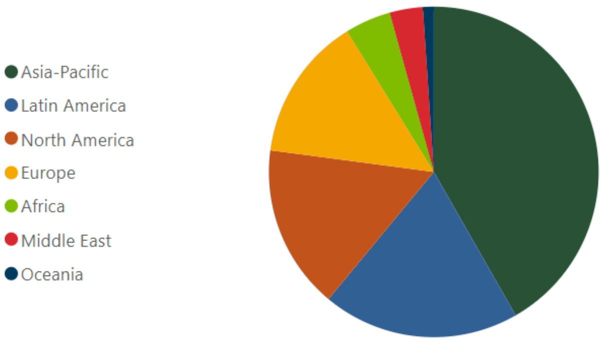
North America: The North American broiler sector also grew by 2.9% in 2023. This success was driven by the region's growing poultry flock, efficient production practices and favorable market conditions, as well as changing consumer preferences.

Oceania: The broiler sector is by far the largest in both Australia's and New Zealand's commercial feed industry, comprising nearly 38% of the region's total feed tonnage. Thanks to this dominance and other factors, the broiler sector grew by more than 1% in Oceania in 2023.

Year	2023	
Region	**Total Feed Tonnage**	**% Change from 2022**
Asia-Pacific	160,67	4,6%
Latin America	74,33	2,6%
North America	61,85	2,9%
Europe	54,24	-1,6%
Africa	17,33	20,9%
Middle East	12,54	2,1%
Oceania	4,09	1,2%
Всего	**385,04**	**3,5%**

*All numbers are in million metric tons

2023 Feed Tonnage by Region



PIGS

The global pig sector faced many challenges, which led to an overall decrease in pig feed production of 1.23%. Moving forward, proper disease management and increased food security will be crucial for achieving growth in the pig sector, along with a dynamic supply chain and the ability to adapt to economic changes.

Africa and the Middle East: The pig sector saw a slight downturn in Africa over the past year but held fairly steady in the Middle East.

Asia-Pacific: The total pig feed tonnage decreased slightly in the Asia-Pacific region for the second year in a row as the result of the over-expansion of the sector in 2020-21, disease disruptions and diminished demand for pork products.

Europe: Pig feed tonnage declined in Europe for the fourth consecutive year, with production down by 2.48 MMT in 2023 compared to 2022. This was due in part to stricter enforcement of environmental laws in various countries and declining export opportunities.

Latin America: Pork feed tonnage continued its upward trend in Latin America, with an increase of 2.42%. The pig sector remains highly competitive compared to other regions thanks to the lower cost of feeding animals there and its efficient production standards.

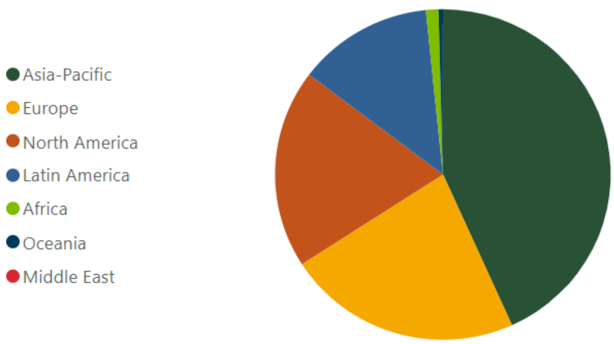
North America: For the second consecutive year, compound pig feed production declined 0.95% (or 0.60 MMT) in North America. This can be attributed to the smaller size of the region's sow herd as a result of negative profit margins, oversupply and increased productivity.

Oceania: Among all agri-food sectors in Oceania, the pig sector was the only major one to experience a decrease in terms of feed tonnage. Pig feed production was down 4.8% in Australia and 14.6% in New Zealand.

Year	2023	
Region	**Total Feed Tonnage**	**% Change from 2022**
Africa	3,88	-0,8%
Asia-Pacific	138,72	-1,3%
Europe	72,61	-3,3%
Latin America	41,88	2,4%
Middle East	0,01	0,0%
North America	62,39	-1,0%
Oceania	1,33	-5,9%
Bcero	**320,80**	**-1,2%**

*All numbers are in million metric tons

2023 Feed Tonnage by Region



DAIRY

Globally, the compound feed produced in the dairy sector decreased by approximately 2.28%. For many countries and regions, the primary culprits behind this decline were high feed costs and low milk prices, which led farmers to make strategic adjustments that included reducing their cow numbers or relying more on non-commercial feed sources.

Africa and the Middle East: Dairy feed tonnage was down both in Africa (by 10.67%) and the Middle East (by 2.69%).

Asia-Pacific: Commercial dairy feed production continued its exciting growth in Asia-Pacific at an even faster pace, rising by 4.52% YOY. India and China stood out as the two markets that increased the most — by 8.7% and 5.8%, respectively.

Europe: The production of dairy feed was down significantly in Europe (6.66%). Challenges with lower milk prices and cattle diseases continue to impact the industry, and water-scarcity issues in countries like Spain and Portugal have led some farms to close down.

Latin America: Commercial
dairy feed production was down less than 1% in Latin America. This decrease was the result of the high cost of production and lower milk prices, which have led farmers to reduce their inputs.

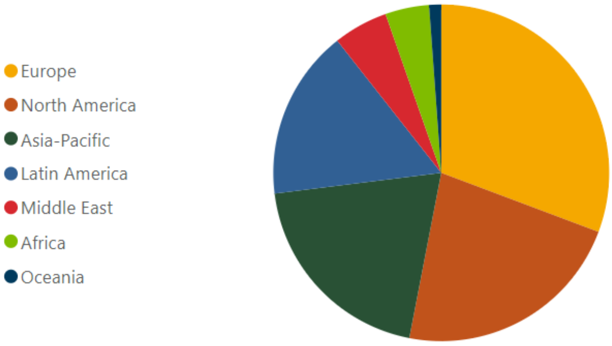
North America: The dairy industry in North America has remained relatively stagnant, with both the number of dairy cows and the amount of feed tonnage consumed staying fairly consistent. Milk yields per cow increased slightly, but lower milk prices led to higher rates of culling.

Oceania: Overall dairy feed tonnage was up 1.04%. Commercial dairy feed production was down 23.97% in New Zealand due to the high cost of production — but a 3.85% increase in Australia more than offset the setbacks experienced elsewhere in the region.

Year	2023	
Region	Total Feed Tonnage	% Change from 2022
Europe	38,76	-6,7%
North America	28,20	-1,1%
Asia-Pacific	25,23	4,5%
Latin America	20,63	-0,8%
Middle East	6,62	-2,7%
Africa	5,33	-10,7%
Oceania	1,46	1,0%
Всего	**126,23**	**-2,3%**

*All numbers are in million metric tons

2023 Feed Tonnage by Region



BEEF

The global decline in the production of beef feed continued, with an overall decrease of 4.36% — the most pronounced downward change among all species sectors last year. Changes in cattle cycles in the United States and stricter sustainability policies in Europe had major impacts, with the Asia-Pacific beef sector notably surpassing Europe's.

Africa and the Middle East: The beef sector experienced growth in both Africa and the Middle East.

Asia-Pacific: Beef feed tonnage was up in Asia-Pacific, driven mainly by growth in the Chinese market following a period of expansion in the domestic beef herd.

Europe: The decline of beef feed tonnage in Europe continued at an even faster pace in 2023, with a reduction of 1.94 MMT. This drop can be explained in large part by low profitability and stricter environmental policies about greenhouse gas and nitrate emissions.

Latin America: For the first time in a decade, beef feed tonnage was down in Latin America, but only by 0.03 MMT (or 0.19%). A high supply of beef led to a record devaluation of live cattle in Brazil. On the other hand, Latin America is expected to remain competitive in export markets.

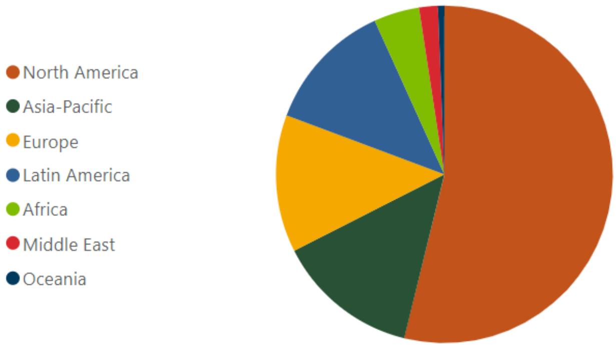
North America: Feed tonnage was down by 5.88% across the region. In Canada, beef feed tonnage was down 10.15%, and the industry continues to reckon with shifting demographics as older producers sell off their farms.

Oceania: Beef feed tonnage was up 10.77% in Oceania, making it the region's main growth sector. Australia has been rebuilding its herd, leading to growing production and exports.

Year	2023	
Region	**Total Feed Tonnage**	**% Change from 2022**
North America	63,25	-5,9%
Asia-Pacific	16,08	1,9%
Europe	15,46	-11,2%
Latin America	14,72	-0,2%
Africa	5,13	2,5%
Middle East	2,12	3,8%
Oceania	0,72	10,8%
Всего	**117,49**	**-4,4%**

*All numbers are in million metric tons

2023 Feed Tonnage by Region



AQUACULTURE

For the first time in recent memory, the global aquaculture sector experienced a decrease in feed tonnage (of 4.43%) over the past year. This decline was driven in part by a significant drop in China's supply of aqua feed due to lower fish prices. Despite adverse weather conditions in Latin America, the demand for aqua products is still strong there, which helped aqua producers there remain resilient.

Africa and the Middle East: The total aqua feed tonnage of both Africa and the Middle East increased slightly.

Asia-Pacific: Aqua feed tonnage decreased in Asia- Pacific, driven by lower fish prices, which led farmers to reduce their stocking density; difficult weather conditions, which impacted fish performance; and economic challenges that decreased consumer demand for fish products.

Europe: As was seen in many other areas, Europe's total aqua feed tonnage was down for the first time in recent years. Diseases in salmon and trout had an especially devastating impact on Norway's aqua production and led to increased mortality rates, diminished feed conversion rates and compromised animal welfare across the region.

Latin America: Latin America continued its growth with an increase of 3.9%. The region's export-driven market remained strong, even in the face of geopolitical tensions and challenging weather conditions.

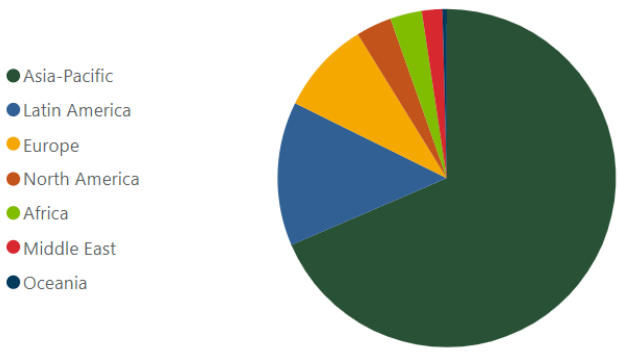
North America: Aqua feed production increased, but only marginally, in Canada and the United States.

Oceania: Aquaculture feed tonnage grew by 7.5%, or 0.02 MMT.

Year	2023	
Region	**Total Feed Tonnage**	**% Change from 2022**
Asia-Pacific	35,70	-7,1%
Latin America	7,17	3,9%
Europe	4,63	-2,9%
North America	1,78	1,4%
Africa	1,58	5,5%
Middle East	1,02	5,4%
Oceania	0,22	7,5%
Всего	**52,09**	**-4,4%**

*All numbers are in million metric tons

2023 Feed Tonnage by Region



PETS

Even now, four years since the onset of the COVID-19 pandemic — which led to exponential growth in the pet sector — the global pet industry continues to grow, albeit at a slower pace of 0.74% in 2023. Demand for high-quality pet products and services remains high.

Africa and the Middle East: Total pet food tonnage increased marginally in Africa, while no noticeable change was recorded in the Middle East.

Asia-Pacific: The pet food sector continued its upward trend in Asia-Pacific, mainly due to an increase in the number of households that include a pet there.

Europe: Unfortunately, Europe stood out as the only market experiencing a decline in pet food production. Supply-chain disruptions and inflationary pressures were the key factors contributing to this decrease.

Latin America: Feed tonnage increased in Latin America over the past year. This increase reflects the demand for only the highest-quality products from Latin American pet owners.

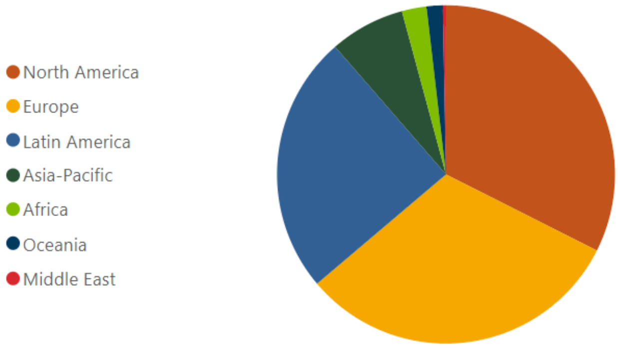
North America: Thanks to shifting production dynamics, North America now claims the top spot in pet food production, totaling 11.34 million tons. The rise of the North American pet industry underscores the changing landscape of the global pet sector.

Oceania: Pet feed tonnage grew by 0.04 MMT in 2023, a7.57% increase.

Year	**2023**	
Region	**Total Feed Tonnage**	**% Change from 2022**
North America	11,34	1,2%
Europe	10,97	-2,7%
Latin America	8,67	3,8%
Asia-Pacific	2,51	2,4%
Africa	0,82	1,0%
Oceania	0,54	7,6%
Middle East	0,11	0,0%
Всего	**34,96**	**0,7%**

*All numbers are in million metric tons

2023 Feed Tonnage by Region



EQUINE

The equine industry has remained strong over the past year, with much of the interest and industry remaining focused in North America. The population of "pleasure breed" horses decreased slightly there in 2023, while the "professional breed" population remained stable but is trending lower.

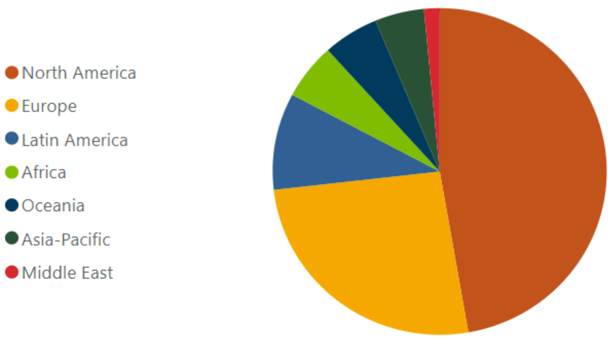
On the other hand, interest in quarter horses continues to rise thanks to the meteoric popularity of "Yellowstone," a TV show that has gained a massive following since it first came on the air in 2018. The top challenges in the equine sector include high labor and material prices. The top technologies impacting the sector are biosecurity, micro-chipping, genetics and nutritional solutions. Survey respondents said the biggest opportunities for nutritional solutions are gut health management and feed efficiency.

Looking ahead, equine feeds are expected to decrease both in price and in volume in the coming year. Economic stagnation and inflation are the top reasons for the decline in equine feed production, as consumers have less disposable income for pleasure horse ownership. Feed for professional horses hasn't changed.

Year	**2023**	
Region	**Total Feed Tonnage**	**% Change from 2022**
North America	3,77	-0,8%
Europe	2,07	0,6%
Latin America	0,76	-20,1%
Africa	0,44	3,2%
Oceania	0,43	4,9%
Asia-Pacific	0,38	-25,6%
Middle East	0,12	-13,1%
Всего	**7,98**	**-3,9%**

*All numbers are in million metric tons

2023 Feed Tonnage by Region



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