

FOOD EXPORT ASSOCIATION OF THE MIDWEST USA AND FOOD EXPORT USA - NORTHEAST

# U.S. Feedlink

A publication highlighting information about the U.S. animal feed and pet food ingredients and additives industries

## WELCOME

Our new publication for feed ingredient buyers is meant to serve as a timely resource for industry news and trends as well as introductions to new products throughout the Midwest and Northeast U.S.

## U.S. Suppliers Drive Feed Ingredients & Additives Market

The feed ingredient and additive industry is robust and complex, representing a variety of products serving multiple agriculture commodities across the world. The International Feed Industry Federation reports that world compound feed production is estimated at over one billion tons annually with an estimated global value of over \$400 billion dollars. The U.S. has long been a leader in the global feed market thanks to our rich agricultural landscape fueled by science and technology.

In fact, feed ingredients from the Midwest and Northeast U.S. are some of the safest in the world as the Food and Drug Administration (FDA) along with the Association of American Feed Control Officials (AAFCO) work together to technically review and evaluate all approved feed ingredients, as well to promote the uniformity of feed laws. This type of oversight guarantees the safety, quality and consistency of all feed products procured from the United States. Additionally, all feed manufacturers are nationally registered and recognized facilities under the Food Safety Modernization Act and must act under process controls utilizing Good Manufacturing Practices and Rules for Feed and Feed Ingredients. As part of these nationally-governed regulations, many feed ingredients are regularly tested both in-house and by third party laboratories for quality indicators including moisture content, protein, fat quality, fat quantity, crude fiber, mycotoxins, pathogens and other quality indicators that may be impacted by damage caused by weather, molds, heat, insects, filth, adulterants or outside contaminants.

Our feed ingredient and additive producers are proud to be part of a growing industry that continues to see year over year growth, which is partly fueled by global population growth. Today both developing and developed nations continue to have increasing demands for food and the United Nations Food and Agriculture Organization (FAO) estimates that by 2050 the demand for food will grow by 60%. To produce more food, the world will need to produce more commodities ... including animal protein, which will require more feed ingredient inputs. Double digit growth is expected in meat production with aquaculture leading the way.

PROTEIN TYPE	2010	2050	VAR.
 SOVINE	66.7	107.5	62%
 POULTRY	98.9	201.9	104%
 PIGS	109.3	150.3	38%
 AQUA	59.9	113.7	90%
 MILK	722.9	1119.7	55%
<b>TOTAL</b>	<b>1057.7</b>	<b>1693.1</b>	<b>60%</b>

Source: FAO Global Food Outlook November 2012; FAO World agriculture towards 2030/2050 - 2012 Rev/DECD FAO Ag Outlook 2013



Globally more than 470+ million dogs and another 370+ cats kept as family pets that fuel a continued growth in the pet food industry. Over the past ten years, pet ownership has continued to grow around the

Today the global pet food industry is valued at over \$40 billion USD and is expected to grow at a CAGR of nearly 6%. For many owners, pets are family and their comfort and care has led to new advancements in pet nutrition including minerals, dietary fiber, carotenoids, and omega-3 fatty acids. In fact, the pet food market now offers customized formulations related to breeds, life states, price points, ingredient preference and disease conditions that continue to grow the pet food ingredient market.

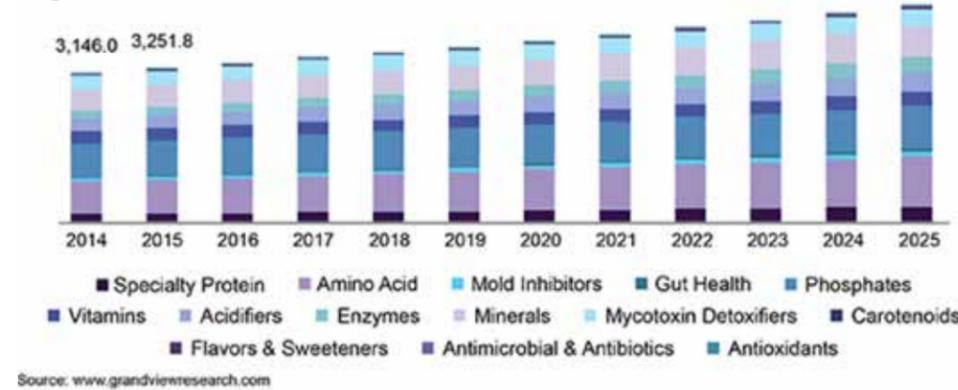
Like the feed ingredients market, the U.S. is also a leader in pet food ingredients. It is expected that amino acids, phosphate and specialty proteins will be important trends that fuel demand in the category. But in addition to general pet nutrition, consumer preference will also play a role in demand. A 2017 consumer survey by Nielsen indicated that consumers want more GMO free, corn free, and hormone free pet foods, as well as foods that include no artificial flavors, fillers or colors.

world as research has proven productivity and health benefits. This type of growth is good news for ingredient manufacturers.

## Pets Power New Pet Food Growth Segments



### U.S. Pet Food Ingredient Market Size by Ingredients, 2014-2025 (Kilotons)



### Animal Food Manufacturing Drives Agriculture, Economy



### How Big Is The U.S. Feed Market

The U.S. is the leading producer of feed ingredients and additives. The Midwest and Northeast regions provide a rich agricultural landscape perfect for producing raw ingredients for animal feed and pet food at 2,881 facilities in 2,251 locations.

By the numbers; amino acids, minerals, acidifiers and mycotoxin detoxifiers lead the feed ingredient market, accounting for \$5.2 billion of an \$8.7 billion market.

- Amino Acids: \$2.2B
- Minerals: \$1.4B
- Acidifiers: \$800M
- Mycotoxin detoxifiers: \$800M.

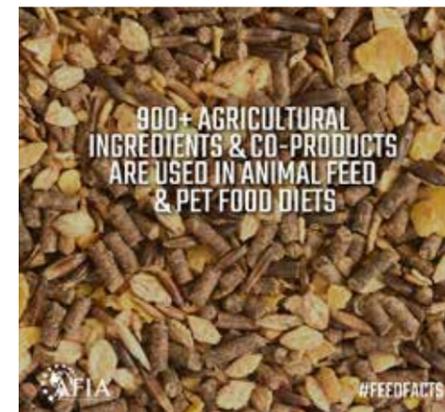
“ Thanks to Food Export-Midwest, I have found a few new suppliers and have been in contact with them since we connected. Participating in events with Food Export has helped our company grow and gain better connection to a wide range of products.” Mr. Zhi Hang Tan | Business Development Manager | Danberg Malaysia

### TRADE POLICY

corner

#### WHAT TO WATCH: U.S.-Mexico Trade Relations

Nearly 30 leading U.S. food and agriculture associations have communicated with Agriculture Secretary Thomas Vilsack and U.S. Trade Representative Katherine Tai over deteriorating trade relationships with Mexico and urged the administration to take action. Some of the leading concerns highlighted by the group include a ban on glyphosate and genetically modified corn, an organic export certification requirement, a state-sponsored campaign disparaging corn sweeteners from the U.S., a cessation of review and approval of biotechnology applications, and a new front-of-pack labeling regulation. These issues hamper the competitiveness of U.S. farmers, ranchers, and other members of the food and agriculture sector. [Read More](#)



### featured products

For more information about these or other Featured Products please email: [feedlink@foodexport.org](mailto:feedlink@foodexport.org)

#### BetaImmune Shield™ Vesta Ingredients Indianapolis, Indiana

Beta glucan is used as a feed additive due to its ability to be an immune modulator. When consumed, it intensifies functions within the immune system, making it more active and alert, and more effective at fighting off bacteria, virus, cancers, parasites, and fungi.

[vestanutra.com](http://vestanutra.com)



#### LAA1000 Great Lakes Bio Systems, Inc. Sturtevant, Wisconsin

LAA1000 is a liquid formulation of specialty blended Amino Acids designed for the enrichment of standardized feed formulas and drinking water. LAA1000 is a synergistic blend that helps optimize nutrient absorption and growth of terrestrial and aquatic animals.

[greatlakesbiosystems.com](http://greatlakesbiosystems.com)

#### Feed-Bond® Brookfield, Wisconsin

Feed-Bond is a Zeolite/ Clinoptilolite has a high capacity for absorbing moisture, a broad range of mycotoxins, ammonia and heavy metals in the feed. An affordable price with a low inclusion rate provides great value and improved performance of livestock, swine, poultry, aquaculture and companion animals.

[acgproducts.com](http://acgproducts.com)



#### Nu-FLOW, RIBUS, Inc. St. Louis, Missouri

Nu-FLOW® offers producers an option to replace synthetics or other anti-caking agents or flow aids with a natural or certified organic ingredient. Using 'rice hulls' gives a clean, consumer-friendly product while also solving anti-caking, flow and other manufacturing and/or production challenges.

[ribus.com](http://ribus.com)

## Feed Solutions Lead Way For Antibiotic Free

Much of the animal industry continues to look for ways to meet consumer demand for antibiotic free products. Continuing research into animal nutrition is providing exciting new feed ingredient products that support less antibiotic use. One of the leading products is phytochemicals which are plant-based herbs, spices, essential oils and polyphenols that offer a variety of animal nutrition benefits.

[Read More](#)

## news & trends

### Researchers Study Hemp Biomass as Feed Ingredient Alternative

Biomass products have long provided affordable sources of feed and feed ingredients and offered sustainable solutions to avoid product waste. New research is being conducted on hemp biomass and its potential for the feed market. The growing demand for hemp and CBD-related products is now providing a significant amount of hemp biomass and scientists and researchers are seeking potential use alternatives.

[Read More](#)



### Edible Insects Offer Alternative Protein Source

Although some people might not be ready to eat crickets as part of a regular diet, insect protein is an affordable, sustainable and growing source of protein – including protein for the animal industry. The animal insect industry is valued at about \$5 million USD and is expected to grow at a rate of 26% over the coming years.

## \$6.5 billion value of the global feed additive industry

### USDA Seeks to Extend Trade Promotion Authority

Much of the work of Food Export relies on joint trade agreements. The USDA has recently indicated it seeks to ask Congress to renew Trade Promotion Authority. Canada, Mexico and Japan are the largest markets for the U.S. feed industry, but expanded trade considerations are being made for markets like China and Vietnam to further address the U.S.-China Phase 1 agreement. [Read More](#)



### Top Trends in the Feed Industry

In future issues expect us to deep dive into some of the current trends impacting the feed, additives and pet food industries. For 2021 and beyond keep your eye on these important trends.

- Sustainability
- Alternative Proteins
- Continued Impact of COVID
- Rising Feed Costs
- Demand for Transparency

## about 17% of the global demand for agricultural feed is produced in the U.S.

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### MISSION STATEMENT

U.S.Feedlink is brought to you by the Food Export Association of the Midwest USA and Food Export USA-Northeast, two state regional trade groups located in the U.S. that promote exports of U.S. food and agriculture. U.S.Feedlink was created to provide readers credible data and information in an easy-to-read format.

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## events

### September 2021

- VIV Asia, Bangkok, Thailand
- Buyers Mission, World Dairy Expo, Madison, Wisconsin

### November 2021

- VIV MEA, Abu Dhabi, UAE
- Ildex Indonesia, Jakarta

### January 2022

- Buyers Mission, IPPE, Atlanta, Georgia

### Spring 2022

- Buyers Mission, Pet Food Forum, Kansas City, Missouri

### June 2022

- Buyers Mission, World Pork Expo, Des Moines, Iowa