

2013

Alltech[®]

Global Feed Summary



EXECUTIVE SUMMARY

Global feed production statistics have traditionally been difficult to quantify because many countries lack national feed associations. For this reason, Alltech began in late 2011 to leverage its global presence to obtain a more accurate estimate of the world's feed tonnage. The results of the annual year-end assessment were announced in January as an industry outlook resource for the new calendar year.

For its second report, Alltech assessed the compound feed production of 134 countries in December 2012. Where possible, information was obtained in partnership with

local feed associations and, when not possible, it was done utilizing information gathered by the more than 500 members of Alltech's global salesforce, who visit more than 26,000 feed mills on an annual basis.

When reviewing the data, there are two considerations to bear in mind. First, numbers for less developed countries may be less accurate, but given their size, this will have little numerical influence on the overall dataset. Second, the definition of feed, feed mill and species varies from country to country.

Overall, the new results affirm a growing feed industry with

a global feed tonnage of 959 million, a 10 percent increase over the late 2011 estimates of 873 million. The actual underlying growth is likely to be about 4 to 5 percent since the latest results include new sources of information not available in 2011 and identify more accurately the statistics for individual species.

China, Brazil, India and Russia (BRIC) represented 26 million tons of the increase, and the USA estimate was increased by 19 million tons, reflecting both growth and the inclusion of new information on petfood and horses.

Country	Total Tonnage (million) 2012
1 China	191.340
2 USA	179.110
3 Brazil	66.285
4 Mexico	28.536
5 Spain	28.231
6 India	26.837
7 Japan	25.220
8 Russia	23.350
9 Germany	22.252
10 France	21.613
11 Canada	19.642
12 Thailand	14.950
13 Netherlands	14.762
14 Korea	14.637
15 Italy	14.633
16 Indonesia	13.801
17 UK	13.551
18 Turkey	12.995
19 Iran	12.000
20 Vietnam	12.000
21 Philippines	11.917
22 South Africa	11.027
23 Argentina	10.115
24 Australia	9.728
25 Poland	8.255
26 Taiwan	7.893
27 Pakistan	7.410
28 Ireland	6.728
29 Belgium	6.281
30 Colombia	5.500
31 Venezuela	5.315
32 Ukraine	5.160

Country	Total Tonnage (million) 2012
33 Egypt	5.000
34 Saudi Arabia	4.530
35 Chile	4.523
36 Malaysia	4.400
37 Denmark	4.200
38 Algeria	4.000
39 Belarus	4.000
40 Hungary	3.832
41 Peru	3.391
42 Serbia	3.391
43 Greece and Cyprus	3.221
44 Portugal	3.085
45 Morocco	2.995
46 Norway	2.940
47 Bangladesh	2.730
48 Israel	2.500
49 Romania	2.295
50 Ecuador	2.245
51 Czech Republic	1.986
52 Bosnia	1.962
53 Sweden	1.925
54 Nigeria	1.900
55 Uruguay	1.419
56 Finland	1.395
57 Paraguay	1.345
58 Bolivia	1.313
59 Kazakhstan	1.280
60 Switzerland	1.265
61 Dominican Republic	1.162
62 Guatemala	1.137
63 Jordan	1.100
64 Libya	1.060

Country	Total Tonnage (million) 2012
65 Albania	1.000
66 Tunisia	1.000
67 Austria	0.965
68 Kenya	0.955
69 New Zealand	0.899
70 Bulgaria	0.887
72 Costa Rica	0.821
73 UAE	0.767
74 Croatia	0.750
75 Cuba	0.750
76 El Salvador	0.744
77 Nepal	0.739
78 Honduras	0.703
79 Iraq	0.700
80 Sri Lanka	0.615
81 Myanmar	0.600
82 Slovakia	0.600
83 Panama	0.568
84 Lebanon	0.500
85 Macedonia	0.500
86 Moldova	0.500
87 Uzbekistan	0.500
88 Armenia	0.500
89 Estonia	0.480
90 Uganda	0.467
91 Lithuania	0.462
92 Oman	0.464
93 Slovenia	0.450
94 Jamaica	0.320
95 Azerbaijan	0.320
96 Nicaragua	0.318
97 Puerto Rico	0.276
98 Tanzania	0.258

Country	Total Tonnage (million) 2012
99 Zambia	0.240
100 Latvia	0.234
101 Reunion	0.230
102 Kuwait	0.230
103 Georgia	0.200
104 Kyrgyzstan	0.200
105 Turkish Cyprus	0.200
106 Cote D'ivoire	0.160
107 Bahrain	0.150
108 Caribbean	0.146
109 Senegal	0.125
110 Ghana	0.100
111 Kosovo	0.100
112 Sudan	0.100
113 Turkmenistan	0.100
114 Trinidad & Tobago	0.094
115 Iceland	0.090
116 Mauritius	0.090
117 Haiti	0.090
118 Luxembourg	0.090
119 Malta	0.080
120 Botswana	0.057
121 Namibia	0.052
122 Zimbabwe	0.040
123 Barbados	0.039
124 Mozambique	0.030
125 Guyana	0.022
126 Seychelles	0.015
127 Suriname	0.012
128 Bahamas	0.008

2013 Alltech Global Feed Survey Results

Among the 134 countries reviewed, China was once again the leading producer of feed with 191 million tons manufactured in the official estimate of more than 10,000 feed mills. Consistent with late 2011 assessments, the United States and Brazil followed in second and third places, with 179 million tons from 5,251 feed mills and 66 million tons from 1,237 feed mills respectively.



Asia continues to be the world's leading feed producing region at 350 million tons. One region, however, exceeded Asia in percent growth over 2011 results. Africa was found to be the fastest growing area in terms of tons of feed manufactured, increasing its tonnage fifteen percent from 47 million in 2011 to 54 million in 2012. The Middle East was estimated to have the largest feed mills, with an average of more than 63,000 tons produced per mill.



Average Feed Tonnage per Million

Region	Total No. of Feedmills	Total Tonnage	Average Tonnage per mill
Africa	794	29,902,000	37,660
Asia	12,149	350,114,000	28,818
Europe	4,449	208,400,000	46,842
Latin America	2,975	137,048,000	46,067
Middle East	385	24,411,500	63,406
North America	5,323	198,752,000	37,338
Other	165	10,773,000	65,291
Total	26240	959,200,000	36,555

2013 Alltech Global Feed Survey Results

When analyzed by species, poultry continues to dominate with a 43 percent share of the feed market at 411 million tons, likely due to religious and taste preferences as well as cost. It grew by approximately 8 percent over 2011 estimates. Sixty percent of all poultry tonnage is dedicated to broilers, with the rest fed to egg layers, turkeys, duck and other fowl.

Number of Feed Mills (Estimate)	Total Tonnage (million) Dec. 2012
26,240	959.2

Total Tonnage per million

Pig	Ruminant				Poultry				Aqua	Other	
	Dairy	Beef	Calf	*Other Ruminant	Layers	Broilers	Turkeys	**Other Poultry		Pets	Horse
218.0	130.0	97.7	1.5	24.8	141.8	245.6	13.0	10.5	44.8	20.5	10.9
	Total Ruminant				Total Poultry				Total Aqua	Total Pet	Total Horse
	254.0				411.0				44.8	20.5	10.9

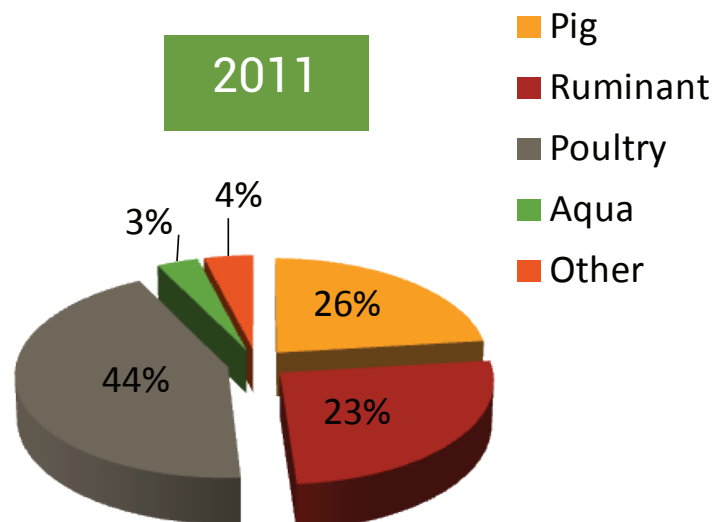
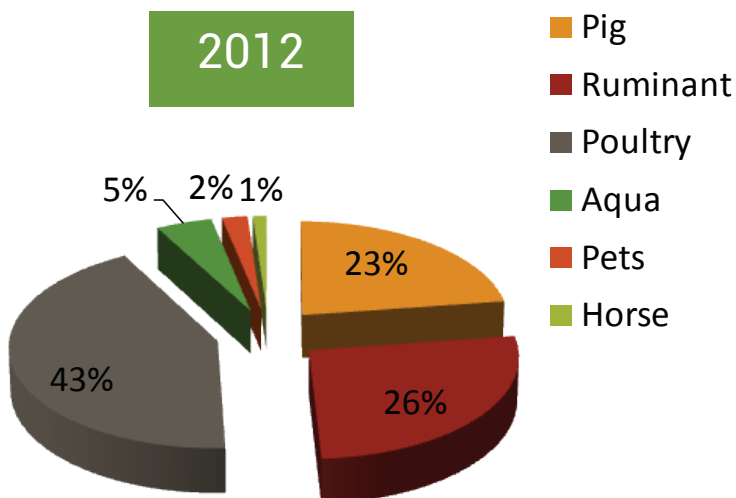
2013 Alltech Global Feed Survey Results

The pig feed sector matched poultry's 8 percent growth, moving to 218 million tons globally. The ruminant feed market, comprising dairy, beef and small ruminants, grew more than 13 percent between late 2011 and December 2012, and now requires 254 million tons. Equine feed tonnage increased almost 17 percent to 10.8 million tons.

Aquaculture is the fastest growing species sector by tonnage with growth greater than 55 percent since 2011. Pet food represents 20.5 million tons, 40 percent of which are produced in the United States, but Brazil continues to make considerable advances in this sector.

The 2012 assessment identified a total of 26,240 feed mills globally, with Asia and North America being home to more than half of them. Sixty percent of the feed produced is pelleted, and this is even more prevalent in Europe.

❖ Poultry	411 Million
❖ Ruminant	254 Million
❖ Pig	218 Million
❖ Aqua	45 Million
❖ Pet	20 Million
❖ Equine	11 Million
<hr/>	
❖ Total	959 Million



2013 Global Feed Tonnage Survey (Dec. 2012)

Rank	Country	Number of Feed Mills	Total Tonnage (million) 2012	Ruminant					Poultry				Other		
				Pig	Dairy	Beef	Calf	*Other Ruminant	Layers	Broilers	Turkeys	**Other Poultry	Aqua	Pets	Horse
1	China	10,000	191.340	58.140	35.500	30.000	0.000	0.000	29.400	20.000	0.000	4.000	13.300	1.000	0.000
2	USA	5,251	179.110	23.590	19.510	23.410	0.100	0.000	23.090	57.220	6.540	0.000	11.650	8.000	6.000
3	Brazil	1,237	66.285	15.400	5.100	2.900	0.000	0.000	5.100	33.200	0.840	0.000	0.635	2.500	0.610
4	Mexico	430	28.536	4.208	4.606	3.027	0.000	0.450	4.560	10.340	0.000	0.000	0.215	0.710	0.420
5	Spain	700	28.231	13.240	2.900	4.000	0.000	2.340	1.600	3.000	0.450	0.000	0.096	0.375	0.230
6	India	862	26.837	0.000	5.854	0.000	0.000	0.008	7.011	10.459	0.000	0.001	3.500	0.002	0.002
7	Japan	156	25.220	6.109	3.299	4.598	0.000	0.050	6.391	3.954	0.000	0.050	0.432	0.315	0.022
8	Russia	500	23.350	6.200	2.000	1.750	0.000	0.000	3.800	9.400	0.200	0.000	0.000	0.000	0.000
9	Germany	340	22.252	9.200	0.000	0.000	0.152	6.400	2.100	3.300	0.000	0.000	0.000	0.700	0.400
10	France	294	21.613	5.700	3.120	1.550	0.357	0.600	2.300	3.500	1.440	1.670	0.122	1.000	0.254
11	Canada	72	19.642	4.000	10.000	0.780	0.000	0.180	0.800	0.960	0.180	0.180	0.760	1.222	0.580
12	Thailand	30	14.950	6.000	0.600	0.200	0.000	0.000	0.700	6.000	0.000	0.300	0.800	0.250	0.100
13	Netherlands	50	14.762	5.500	0.000	0.000	0.652	2.800	2.800	2.500	0.000	0.000	0.000	0.310	0.200
14	Korea	41	14.637	4.606	1.107	4.224	0.000	0.000	1.679	1.779	0.000	0.000	1.242	0.000	0.000
15	Italy	340	14.633	3.500	2.020	1.755	0.150	0.235	3.500	2.750	0.000	0.000	0.105	0.570	0.048
16	Indonesia	70	13.801	0.500	0.600	0.000	0.000	0.050	5.063	6.188	0.000	0.100	1.300	0.000	0.000
17	UK	340	13.551	1.506	2.729	0.980	0.001	0.899	1.789	3.287	0.525	0.813	0.145	0.700	0.177
18	Turkey	350	12.995	0.000	5.500	1.700	0.000	0.000	1.500	4.000	0.000	0.250	0.000	0.045	0.000
19	Iran	240	12.000	0.000	3.000	0.900	0.000	0.000	4.000	4.000	0.000	0.000	0.100	0.000	0.000
20	Vietnam	230	12.000	6.500	0.125	0.000	0.000	0.000	0.855	1.240	0.000	0.360	2.920	0.000	0.000
21	Philippines	20	11.917	7.500	0.002	0.002	0.000	0.001	1.150	2.550	0.000	0.200	0.500	0.006	0.006
22	South Africa	104	11.027	0.851	1.974	2.525	0.000	0.631	1.183	3.295	0.000	0.184	0.003	0.250	0.131
23	Argentina	800	10.115	1.115	1.600	1.700	0.000	0.000	1.800	3.200	0.000	0.000	0.000	0.700	0.000
24	Australia	120	9.728	1.550	1.800	0.500	0.000	2.300	0.520	1.900	0.100	0.000	0.350	0.268	0.440
25	Poland	71	8.255	2.300	0.000	0.000	0.000	0.875	1.725	1.850	0.000	0.000	1.150	0.205	0.150
26	Taiwan	66	7.893	4.038	0.220	0.055	0.000	0.007	1.112	1.500	0.007	0.516	0.437	0.001	0.000
27	Pakistan	150	7.410	0.000	0.200	0.005	0.000	0.000	1.400	5.800	0.000	0.000	0.000	0.000	0.005
28	Ireland	97	6.728	0.781	1.715	1.676	0.000	0.230	0.314	0.754	0.930	0.028	0.000	0.158	0.141
29	Belgium	150	6.281	3.000	0.000	0.000	0.039	1.000	1.000	1.000	0.000	0.000	0.000	0.142	0.100
30	Colombia	3	5.500	0.713	0.000	0.000	0.000	0.516	1.238	2.400	0.395	0.130	0.030	0.078	0.000
31	Venezuela	34	5.315	1.084	0.264	0.000	0.000	0.036	1.091	2.520	0.000	0.093	0.072	0.105	0.050
32	Ukraine	120	5.160	1.703	0.877	1.320	0.000	0.000	0.525	0.735	0.000	0.000	0.000	0.000	0.000
33	Egypt	100	5.000	0.000	0.400	0.100	0.000	0.000	2.500	2.000	0.000	0.000	0.000	0.000	0.000
34	Saudi Arabia	7	4.530	0.000	1.000	0.100	0.000	0.200	0.870	2.270	0.000	0.000	0.000	0.000	0.090
35	Chile	67	4.523	1.327	0.400	0.100	0.000	0.000	0.401	1.326	0.000	0.109	0.650	0.160	0.050
36	Malaysia	45	4.400	0.500	0.000	0.000	0.000	0.000	1.100	2.400	0.000	0.280	0.120	0.000	0.000
37	Denmark	33	4.200	2.600	0.682	0.180	0.000	0.000	0.139	0.285	0.000	0.146	0.140	0.000	0.028
38	Algeria	330	4.000	0.000	0.400	0.800	0.000	0.000	1.800	1.000	0.000	0.000	0.000	0.000	0.000
39	Belarus	3	4.000	2.000	1.000	0.000	0.000	0.000	0.400	0.600	0.000	0.000	0.000	0.000	0.000
40	Hungary	370	3.832	1.110	0.595	0.000	0.000	0.650	0.250	0.650	0.250	0.325	0.000	0.001	0.001
41	Peru	10	3.391	0.205	0.082	0.051	0.000	0.000	0.465	2.202	0.000	0.202	0.144	0.040	0.000
42	Serbia	63	3.391	1.235	0.692	0.692	0.000	0.026	0.360	0.375	0.000	0.000	0.011	0.000	0.000
43	Greece and Cyprus	120	3.221	0.600	0.350	0.150	0.001	1.500	0.070	0.350	0.000	0.000	0.200	0.000	0.000
44	Portugal	135	3.085	0.886	0.330	0.210	0.000	0.268	0.350	0.780	0.120	0.024	0.031	0.055	0.031
45	Morocco	25	2.995	0.000	0.280	2.100	0.000	0.022	0.020	0.380	0.088	0.010	0.000	0.045	0.050
46	Norway	80	2.940	0.250	0.000	0.000	0.000	0.900	0.070	0.180	0.000	0.000	1.500	0.000	0.040
47	Bangladesh	80	2.730	0.000	0.020	0.010	0.000	0.030	0.270	1.400	0.300	0.000	0.700	0.000	0.000
48	Israel	25	2.500	0.000	0.300	0.100	0.000	0.100	0.900	1.000	0.000	0.000	0.100	0.000	0.000
49	Romania	65	2.295	0.980	0.110	0.030	0.000	0.018	0.250	0.750	0.056	0.100	0.000	0.001	0.000
50	Ecuador	40	2.245	0.183	0.041	0.022	0.000	0.000	0.443	1.261	0.000	0.000	0.270	0.025	0.000

TOP 50 IN-DEPTH RESULTS



ABOUT ALLTECH

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CONTACT US

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