

# Animal Feed Report

## AUGUST 2025

Report Released: November 2025

### INTRODUCTION

Welcome to the AFMA Monthly Animal Feed Report for August 2025. This detailed report provides a thorough analysis of the animal feed industry, showcasing key data and trends that reflect the performance of feed products both month-over-month (August 2025 compared to July 2025) and year-over-year (August 2025 compared to August 2024).

- 2023: - 4,715,484 tons
- 2024: 4,486,504 tons (▼-4.9% vs. 2023)
- 2025: 4,694,349 tons (▲4.6% vs. 2024)

The cumulative total feed production reported by AFMA members shows notable fluctuations over the past three years. From January to August, production reached 4 715 484 tons in 2023, declining to 4 486 504 tons in 2024, which represents a decrease of approximately 4.8% year-on-year. In contrast, 2025 experienced a recovery, with cumulative production rising to 4 694 349 tons, reflecting an increase of about 4.6% compared to 2024. Overall, while total feed production experienced a temporary decline in 2024, the industry demonstrated resilience by returning to near-2023 levels in 2025.

The growth trajectory in AFMA feed production is clearly reflected in both the month-on-month and year-on-year comparisons shown below, highlighting a recovery.

#### Month-on-Month (July → August 2025):

- July 2025: 608,945 tons
- August 2025: 596,076 tons
- Change: ▼12,869 tons (▼2.1%)

#### Year-on-Year (August 2024 → August 2025):

- August 2024: 591,677 tons
- August 2025: 596,076 tons
- Change: ▲4,399 tons (▲0.7%)

Production of total feed showed mixed trends in the short and medium term. Year-on-year comparison for August 2025 versus August 2024 indicates a modest positive growth of 0.7%, increasing from 591 677 tons to 596 076 tons, a gain of 4 399 tons. In contrast, month-on-month figures reveal a contraction of 2.1%, with production declining from 608 945 tons in July 2025 to 596 076 tons in August 2025, a reduction of 12 869 tons.

#### Important note

The August 2025 AFMA official data is used in this report, as the release of November 2025 offers a comparative analysis of August 2025 with August 2024 (year-on-year) and August 2025 with July 2025 (month-on-month). The cumulative figures presented reflect total feed production from January to August 2025.

[See the link below from the AFMA website](#)  
[Feed Sales & Raw Material Trends - AFMA](#)

## TOTAL FEED PRODUCTION

596,076

August 2025

608,945

July 2025

-2,1% 

Month-on-Month  
Difference (%)

-12,869

Month-on-Month  
Difference (Tons)

596,076

August 2025

591,677

August 2024

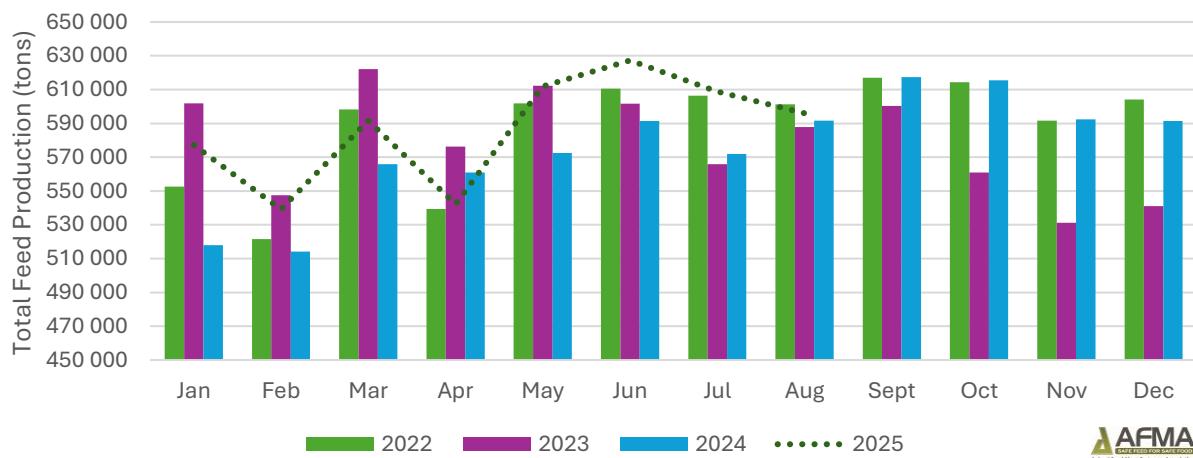
+0,7% 

Year-on-Year Difference  
(%)

4,399

Year-on-Year Difference  
(Tons)

### Total Monthly Animal Feed Production Trends

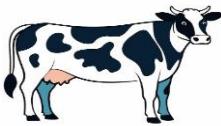


**AFMA**  
SAFE FEED FOR SMART FOOD  
Animal Feed Manufacturers Association

### ANIMAL FEED SPECIES SHARE IN TOTAL FEED PRODUCTION

	2021	2022	2023	2024	2025	5-years Average
<i>Dairy Feed</i>	14,08	12,92	13,55	14,32	13,89	13,75
<i>Beef &amp; Sheep Feed</i>	12,32	11,71	12,11	12,17	10,55	11,77
<i>Pig Feed</i>	5,92	6,50	6,40	6,59	6,78	6,44
<i>Layer Feed</i>	14,82	13,60	11,83	11,35	12,99	12,92
<i>Broiler Feed</i>	41,29	43,27	44,32	43,93	44,23	43,41
<i>Horse Feed</i>	0,33	0,33	0,34	0,34	0,32	0,33
<i>Dog Food</i>	0,02	0,01	0,02	0,04	0,05	0,03
<i>Other Feed</i>	0,15	0,19	0,17	0,16	0,17	0,17
<i>Maize-free Feed</i>	2,39	2,32	2,21	1,99	1,70	2,12
<i>Breeder Feed</i>	7,94	8,52	8,43	8,31	8,56	8,35
<i>Aquaculture Feed</i>	0,05	0,13	0,13	0,13	0,11	0,11
<i>Ostrich Feed</i>	0,22	0,15	0,10	0,14	0,20	0,16
<i>Concentrate/Supplement</i>	0,02	0,03	0,06	0,07	0,05	0,05
<i>Rabbit Feed</i>	0,03	0,02	0,02	0,01	0,01	0,02
<i>Game Feed</i>	0,41	0,29	0,32	0,46	0,37	0,37

NB: 2025 covers Jan to Aug information



## DAIRY FEED

83,493

August 2025

80,402

July 2025

+3,8%

Month-on-Month  
Difference (%)

3,091

Month-on-Month  
Difference (Tons)

83,493

August 2025

84,235

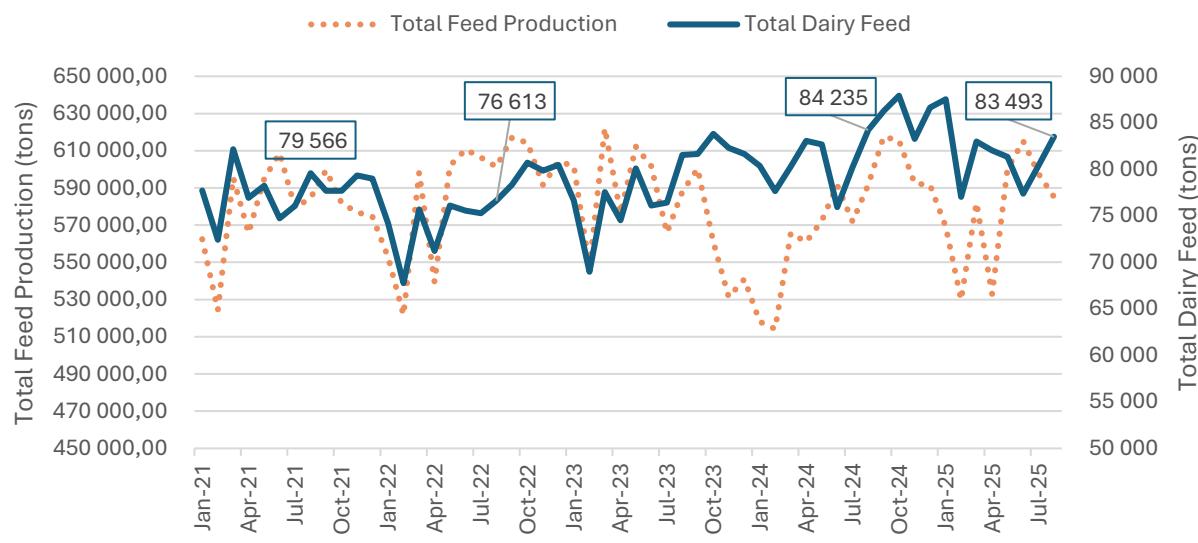
August 2024

-0,9%

Year-on-Year Difference  
(%)

-742

Year-on-Year Difference  
(Tons)



The cumulative dairy feed production indicates steady growth over the past three years. Total output from January to August increased from 611 881 tons in 2023 to 644 530 tons in 2024, representing a 5.3% cumulative expansion. Growth continued into 2025, with cumulative production rising to 652 211 tons, a more modest yet positive 1.2% increase compared to the same period in 2024. Despite the strong cumulative performance, the industry experienced short-term fluctuations. August 2025 recorded a slight contraction of 0.9% compared to August 2024, declining from 84 235 tons to 83 493 tons, a reduction of 742 tons. This negative year-on-year movement indicates some pressure on monthly production volumes. However, the month-to-month comparison shows renewed positive momentum. Production increased by 3.8% between July and August 2025, rising from 80 402 tons to 83 493 tons, equivalent to an improvement of 3 091 tons.



## BEEF & SHEEP FEED

66,107

August 2025

75,116

July 2025

-12,0%

Month-on-Month  
Difference (%)

-9,009

Month-on-Month  
Difference (Tons)

66,107

August 2025

75,656

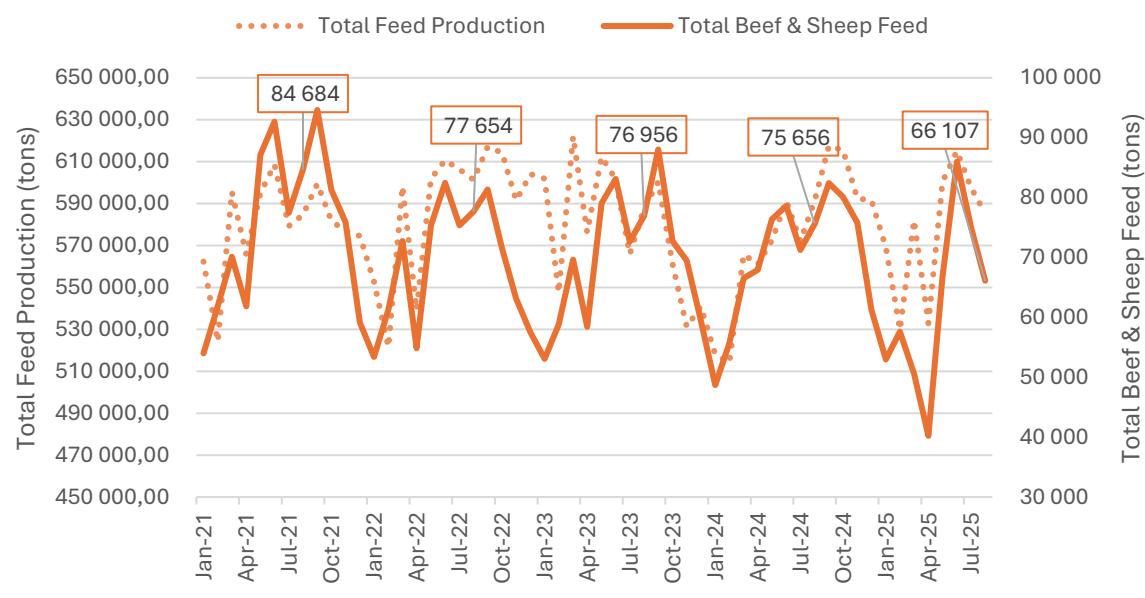
August 2024

-12,6%

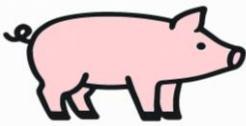
Year-on-Year  
Difference (%)

-9,549

Year-on-Year Difference  
(Tons)



Beef and sheep feed production shows a declining trend over the past three years. Cumulative output from January to August dropped from 551 696 tons in 2023 to 540 685 tons in 2024, reflecting a 2.0% contraction. The downward trajectory intensified in 2025, with cumulative production falling further to 495 421 tons, representing an additional 8.4% decline compared to 2024. Year-on-year production for August 2025 declined by 12.6%, decreasing from 75 656 tons in August 2024 to 66 107 tons, a reduction of 9 549 tons. Month-to-month results show a similarly negative pattern. Production fell from 75 116 tons in July 2025 to 66 107 tons in August 2025, amounting to a 12.0% decline, or 9 009 tons.



## PIG FEED

38,630

August 2025

39,554

July 2025

-2,3%

Month-on-Month  
Difference (%)

-924

Month-on-Month  
Difference (Tons)

38,630

August 2025

39,388

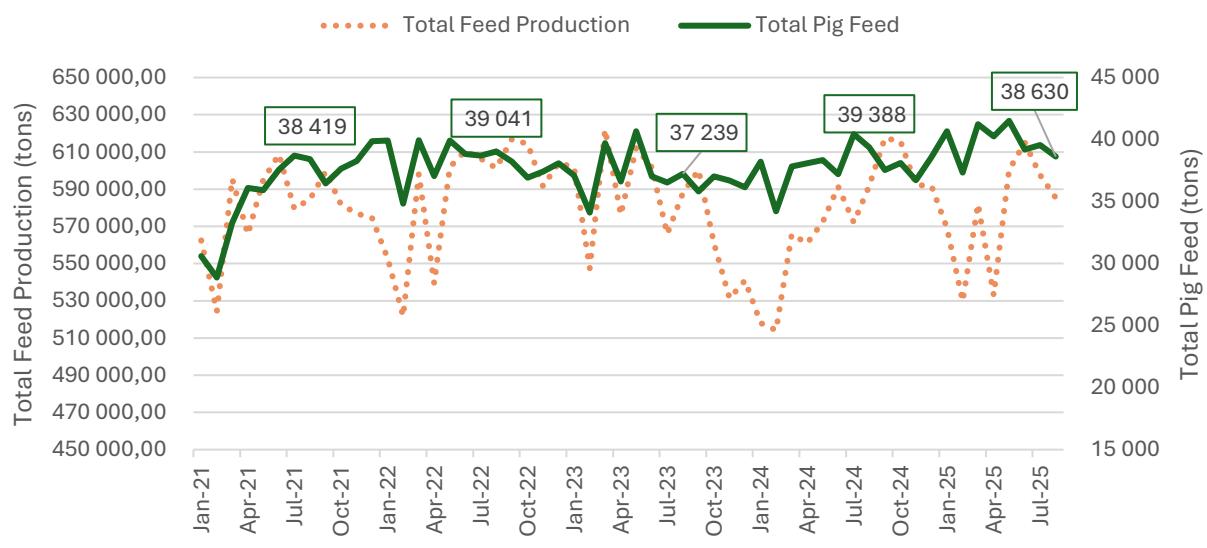
August 2024

-1,9%

Year-on-Year Difference (%)

-758

Year-on-Year Difference (Tons)



The cumulative pig feed production shows a moderate upward trend over the three-year period, although growth remains uneven. Total cumulative output from January to August increased from 299 026 tons in 2023 to 303 711 tons in 2024, reflecting a 1.6% increase. The positive trajectory continued into 2025, with cumulative production rising to 318 383 tons, representing a stronger 4.8% increase compared to 2024. Despite cumulative gains, short-term performance indicators for 2025 point to some pressure in the pig feed market. August 2025 recorded a 1.9% decline compared to August 2024, with production falling from 39 388 tons to 38 630 tons, a decrease of 758 tons. Month-to-month results similarly show a contraction. Production dropped by 2.3% from July to August 2025, declining from 39 554 tons to 38 630 tons, equivalent to a reduction of 924 tons.



## LAYER FEED

78,355  
August 2025

82,297  
July 2025

-4,8%   
Month-on-Month  
Difference (%)

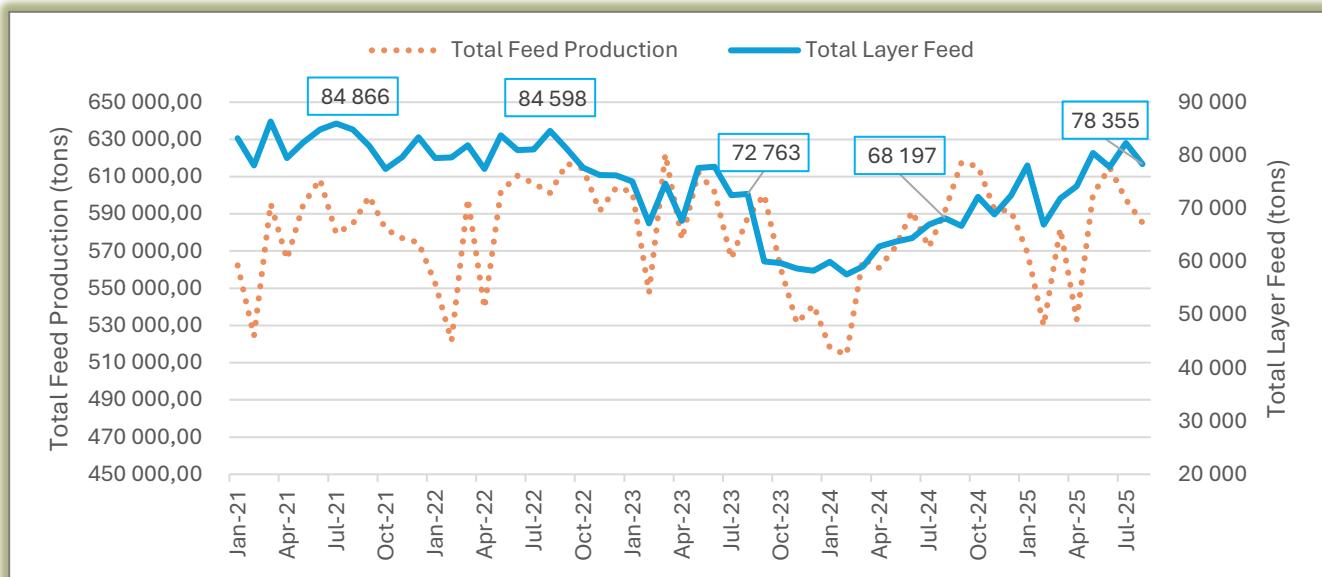
-3,942  
Month-on-Month  
Difference (Tons)

78,355  
August 2025

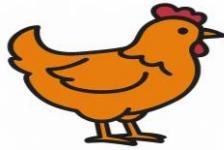
68,197  
August 2024

+14,9%   
Year-on-Year Difference  
(%)

10,158  
Year- on-Year Difference  
(Tons)



The cumulative production of layer feed from January to August shows notable fluctuations over the three-year period. Total cumulative production declined from 585 432 tons in 2023 to 502 932 tons in 2024, representing a significant 14.1% contraction. However, the production rebounded strongly in 2025, with cumulative production rising to 610 028 tons, a substantial 21.3% increase compared to 2024. When evaluated against 2023 levels, 2025 production reflects a more moderate 4.2% growth, indicating that the industry has not only recovered from the 2024 downturn but surpassed its earlier performance. Year-on-year analysis for August reveals a positive trend. August 2025 production increased by 14.9%, rising from 68 197 tons in 2024 to 78 355 tons in 2025, an improvement of 10 158 tons. In contrast, the month-on-month comparison indicates short-term pressure on output. Production decreased from 82 297 tons in July 2025 to 78 355 tons in August 2025, a 4.8% decline, equivalent to 3 942 tons.



## BROILER FEED

261,132

August 2025

259,663

July 2025

+0,6%

Month-on-Month  
Difference (%)

1,469

Month-on-Month  
Difference (Tons)

261,132

August 2025

254,376

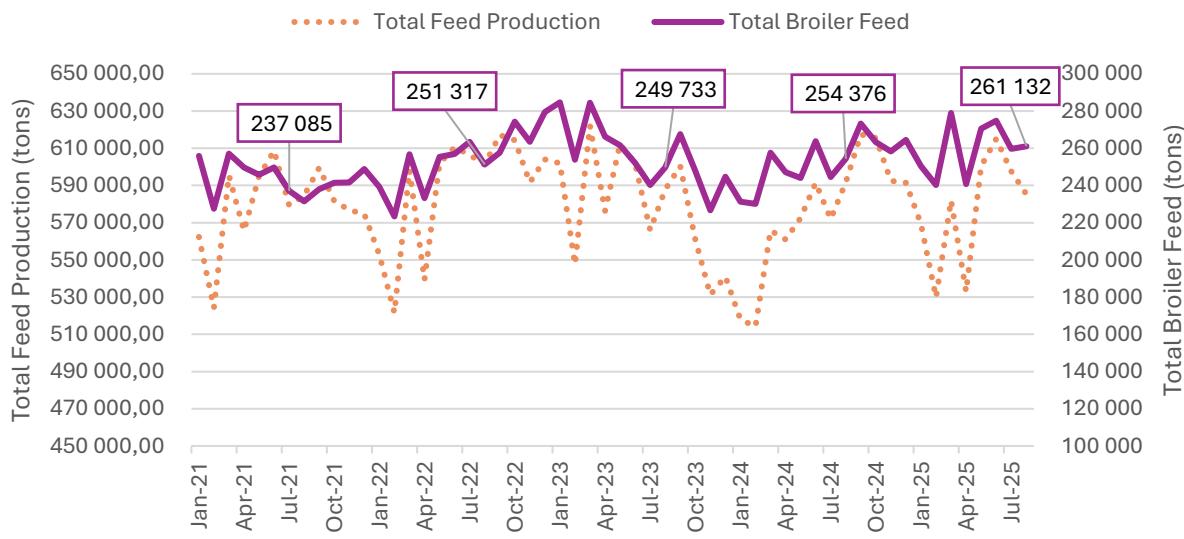
August 2024

+2,7%

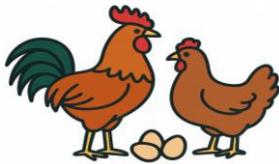
Year-on-Year  
Difference (%)

6,756

Year-on-Year  
Difference (Tons)



The cumulative broiler feed production from January to August shows a mixed performance over the three-year period. Cumulative production decreased from 2 092 875 tons in 2023 to 1 973 085 tons in 2024, reflecting a 5.7% contraction. However, the sector rebounded in 2025, with cumulative production rising to 2 076 496 tons, marking a 5.2% increase compared to 2024. Although production has not yet returned to 2023 levels, the recovery in 2025 indicates renewed industry stability and improving feed demand from the broiler sector. Year-on-year production for August grew by 2.7%, increasing from 254 376 tons in August 2024 to 261 132 tons in August 2025, an improvement of 6 756 tons. Month-to-month performance also points to steady progress. Between July and August 2025, broiler feed production rose by 0.6%, climbing from 259 663 tons to 261 132 tons, a gain of 1 469 tons. Overall, the data reflects a recovering broiler feed sector in 2025, characterised by positive year-on-year and monthly growth.



## BREEDER FEED

49,525

August 2025

52,057

July 2025

-4,9% 

Month-on-Month  
Difference (%)

-2,532

Month-on-Month  
Difference (Tons)

49,525

August 2025

50,393

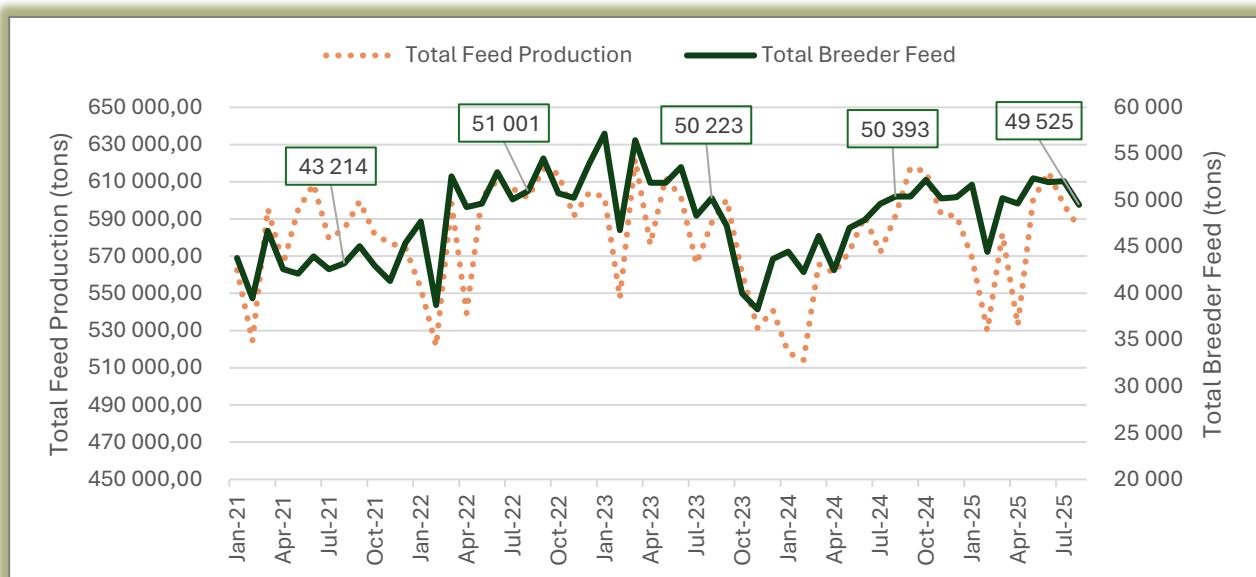
August 2024

-1,7% 

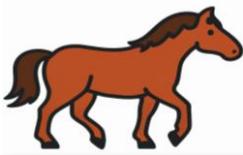
Year-on-Year Difference  
(%)

-868

Year-on-Year Difference  
(Tons)



The cumulative breeder feed production from January to August reflects notable fluctuations over the three-year period. Total cumulative production declined from 416 347 tons in 2023 to 370 357 tons in 2024, representing an 11% contraction. However, the production showed recovery in 2025, with cumulative production rising to 401 963 tons, an increase of 8.6% compared to 2024. Although production has not yet returned to 2023 levels, the rebound suggests improving conditions and renewed demand within the breeder segment. Short-term performance indicators show continued pressure on monthly production volumes. August 2025 recorded a year-on-year decline of 1.7%, decreasing from 50 393 tons in August 2024 to 49 525 tons, a drop of 868 tons. This indicates that despite the cumulative recovery seen in 2025, monthly production remains slightly weaker compared to the previous year. Month-on-month data further highlights this strain. Production fell by 4.9% between July and August 2025, dropping from 52 057 tons to 49 525 tons, a reduction of 2 532 tons.



## HORSE FEED

1,955

August 2025

1,983

July 2025

-1,4%

Month-on-Month  
Difference (%)

-28

Month-on-Month  
Difference (Tons)

1,955

August 2025

1,938

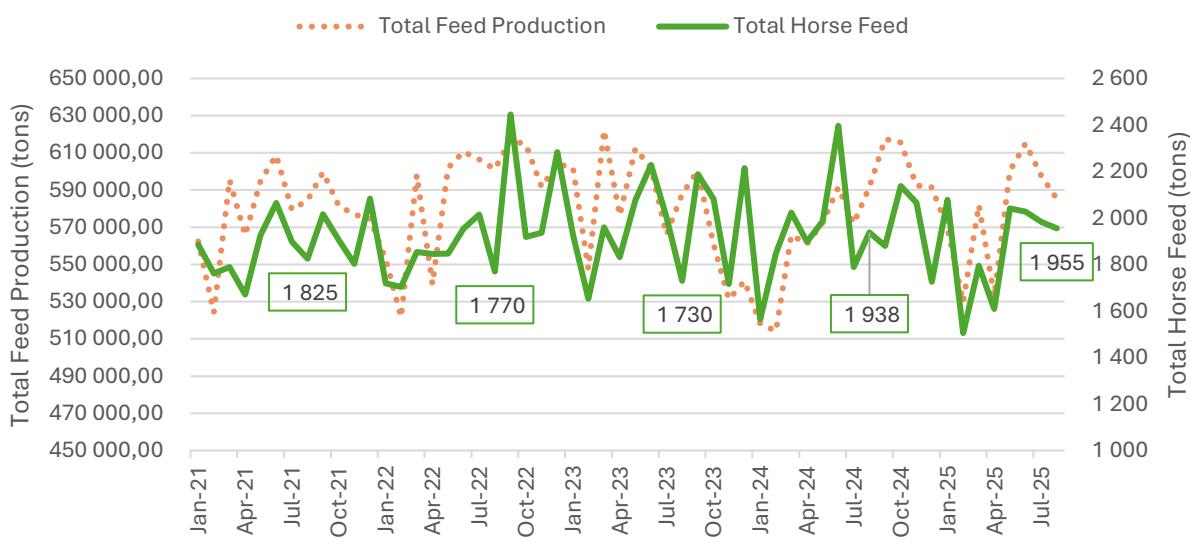
August 2024

+0,9%

Year-on-Year Difference  
(%)

17

Year-on-Year Difference  
(Tons)



The cumulative production of horse feed from January to August shows mixed performance over the three-year period. Cumulative production increased marginally from 15 410 tons in 2023 to 15 440 tons in 2024, reflecting a very modest 0.2% growth. However, cumulative production declined in 2025 to 14 992 tons, representing a 2.9% decrease compared to 2024. Despite the weaker cumulative performance in 2025, the year-on-year comparison for August reflects a slight improvement. Production increased from 1 938 tons in August 2024 to 1 955 tons in August 2025, marking a 0.9% growth, an additional 17 tons. This positive annual movement suggests a mild recovery in monthly demand or enhanced supply stability during the period. In contrast, the month-on-month analysis highlights short-term pressures. Production dropped from 1 983 tons in July 2025 to 1 955 tons in August 2025, a 1.4% decline, equivalent to 28 tons.



## GAME FEED

2,995

August 2025

3,116

July 2025

-3,9%

Month-on-Month  
Difference (%)

-121

Month-on-Month  
Difference (Tons)

2,995

August 2025

3,652

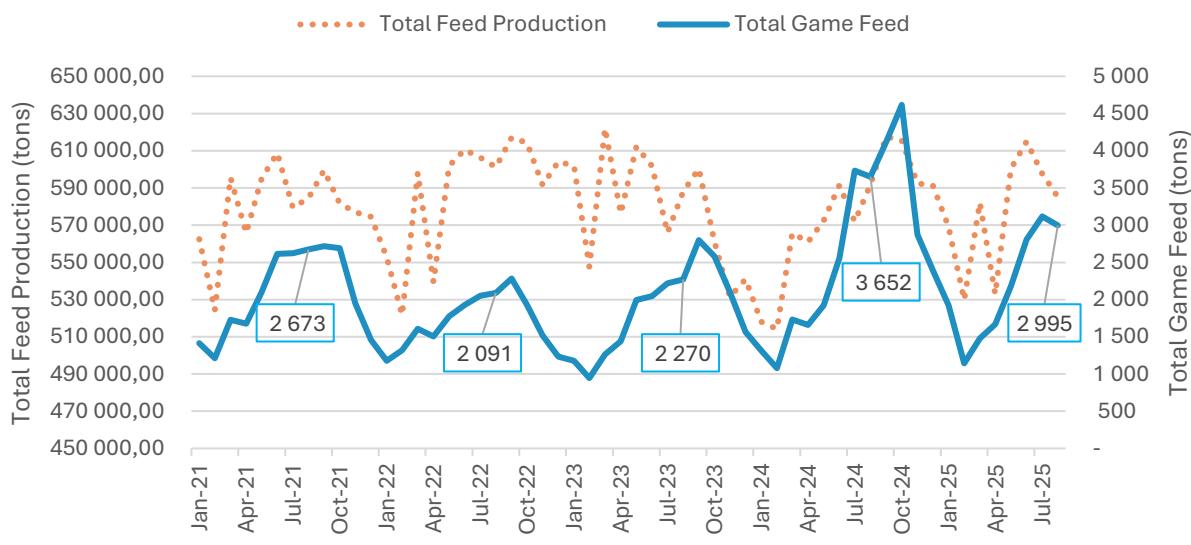
August 2024

-18,0%

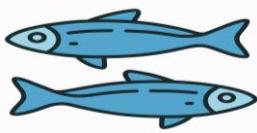
Year-on-Year Difference  
(%)

-657

Year-on-Year Difference  
(Tons)



The cumulative production of game feed between January and August shows notable fluctuations over the three-year period. Cumulative production increased significantly from 13 354 tons in 2023 to 17 641 tons in 2024, reflecting a substantial 31.9% growth. However, this upward trajectory slowed in 2025, with cumulative production reaching 17 313 tons, representing a slight 1.9% decline compared to the same period in 2024. This suggests that while game feed production expanded strongly in 2024, demand or production capacity may have stabilised in 2025. Short-term performance indicators reinforce this slowdown. August 2025 recorded a sharp year-on-year decline of 18.0%, with production falling from 3 652 tons in August 2024 to 2 995 tons in August 2025, a contraction of 657 tons. Month-to-month results exhibit a similar downward trend. Production decreased by 3.9% between July and August 2025, declining from 3 116 tons to 2 995 tons, equivalent to a reduction of 121 tons.



## AQUACULTURE FEED

682

August 2025

815

July 2025

-16,3% 

Month-on-Month  
Difference (%)

-133

Month-on-Month  
Difference (Tons)

682

August 2025

716

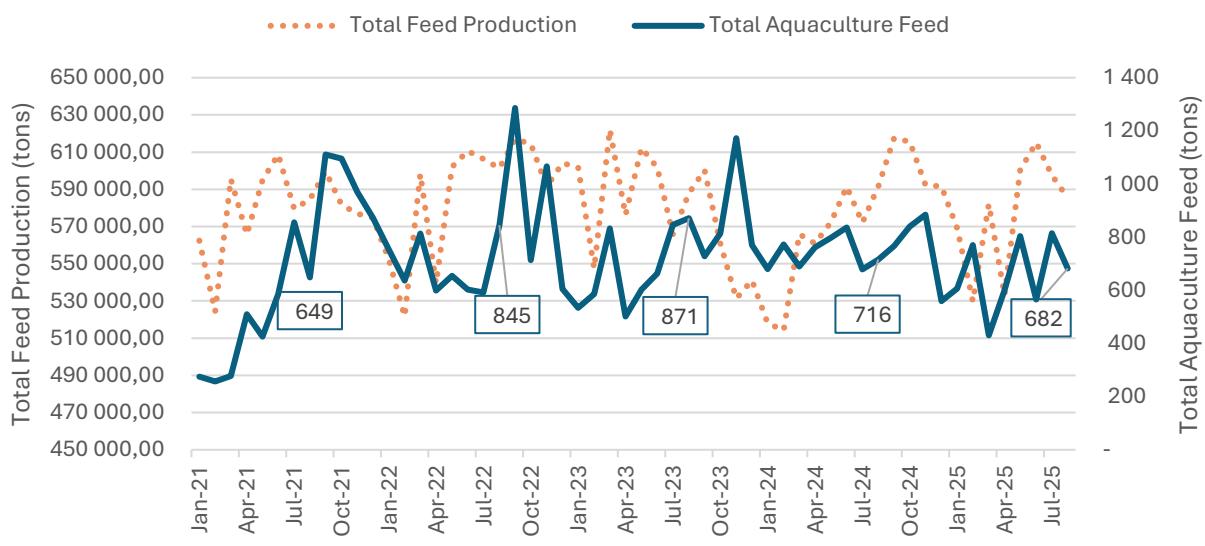
August 2024

-4,7% 

Year-on-Year Difference (%)

-34

Year-on-Year Difference (Tons)



The aquaculture feed segment recorded mixed performance over the three-year period. Cumulative production from January to August increased from 5 438 tons in 2023 to 5 934 tons in 2024, reflecting a 9.1% year-on-year increase. However, this upward trend did not continue into 2025. Instead, cumulative production declined to 5 273 tons, representing an 11.1% contraction compared to 2024. Short-term performance indicators further highlight the slowdown. Year-on-year production for August fell by 4.7%, decreasing from 716 tons in August 2024 to 682 tons in August 2025, a reduction of 34 tons. Month-to-month dynamics paint an even more challenging picture. Production dropped sharply by 16.3% between July and August 2025, falling from 815 tons to 682 tons, a decline of 133 tons.



## OSTRICH FEED

1,096

August 2025

1,241

July 2025

-11,7%

Month-on-Month  
Difference (%)

-145

Month-on-Month  
Difference (Tons)

1,096

August 2025

783

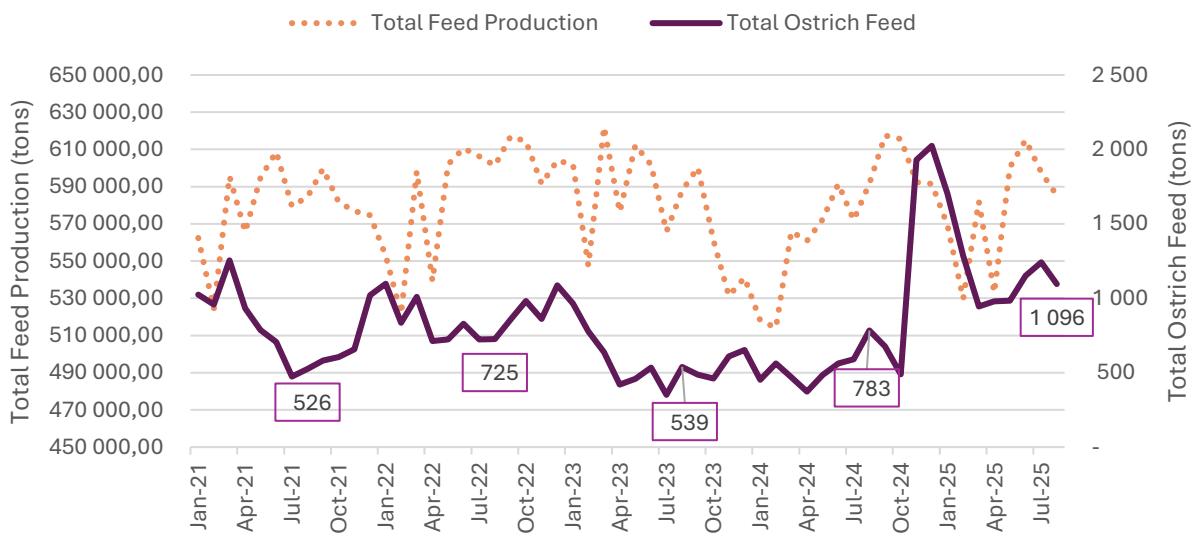
August 2024

+40,0%

Year-on-Year Difference  
(%)

313

Year-on-Year Difference  
(Tons)



The cumulative ostrich feed production over the first eight months of the year reflects significant fluctuations in production over the past three years. Total production declined slightly from 4 685 tons in 2023 to 4 275 tons in 2024, representing a 8.7% decrease, indicating a contraction in production during that period. However, 2025 saw a remarkable rebound, with cumulative production reaching 9 384 tons, which is a 119.5% increase compared to 2024, highlighting a substantial growth in ostrich feed production. Monthly trends indicate further variability in production volumes. On a year-on-year basis, August 2025 recorded a notable 40.0% increase, rising from 783 tons in August 2024 to 1 096 tons, a gain of 313 tons. Conversely, month-on-month comparisons reveal a temporary slowdown. Production fell by 11.7% from July to August 2025, decreasing from 1 241 tons to 1 096 tons, equivalent to a reduction of 145 tons.



## DOG FOOD

298

August 2025

300

July 2025

-0,7%

Month-on-Month  
Difference (%)

-2

Month-on-Month  
Difference (Tons)

298

August 2025

311

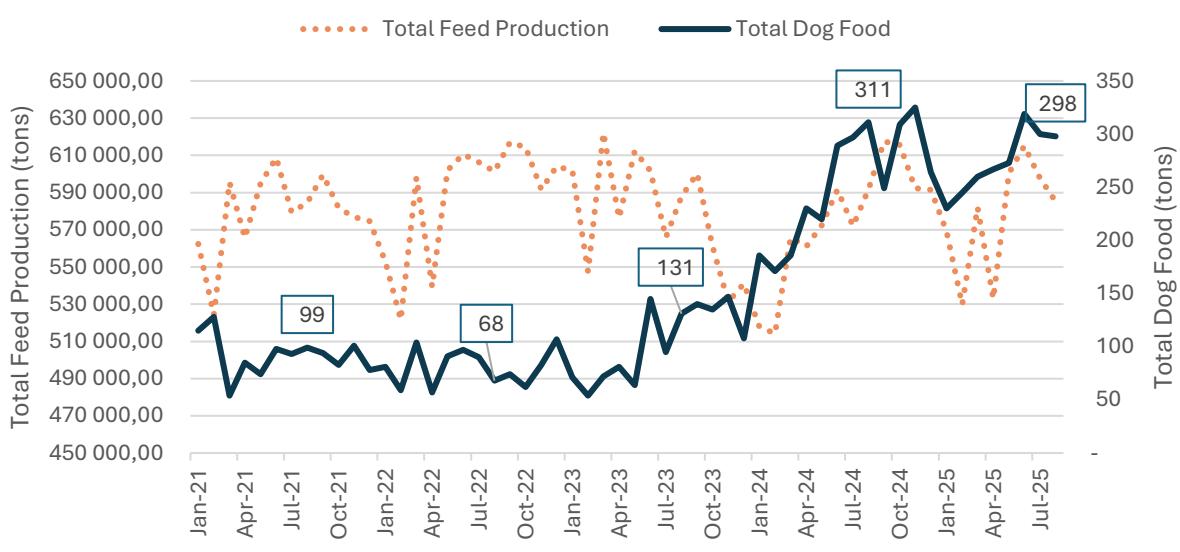
August 2024

-4,2%

Year-on-Year  
Difference (%)

-13

Year-on-Year  
Difference (Tons)



The cumulative production of dog food has demonstrated strong growth over the past three years. Total cumulative production from January to August increased from 713 tons in 2023 to 1 890 tons in 2024, reflecting a substantial 165.2% growth. Production continued to rise in 2025, reaching 2 192 tons, a further 16.0% increase compared to the same period in 2024. Despite the strong cumulative performance, short-term monthly and annual comparisons reveal some fluctuations. August 2025 recorded a decline of 4.2% year-on-year, dropping from 311 tons in August 2024 to 298 tons, a reduction of 13 tons. Month-to-month figures also showed a slight contraction, with production falling 0.7% from 300 tons in July 2025 to 298 tons in August 2025, a decrease of 2 tons.



## RABBIT FEED

69  
August 2025

82  
July 2025

-15,9%   
Month-on-Month  
Difference (%)

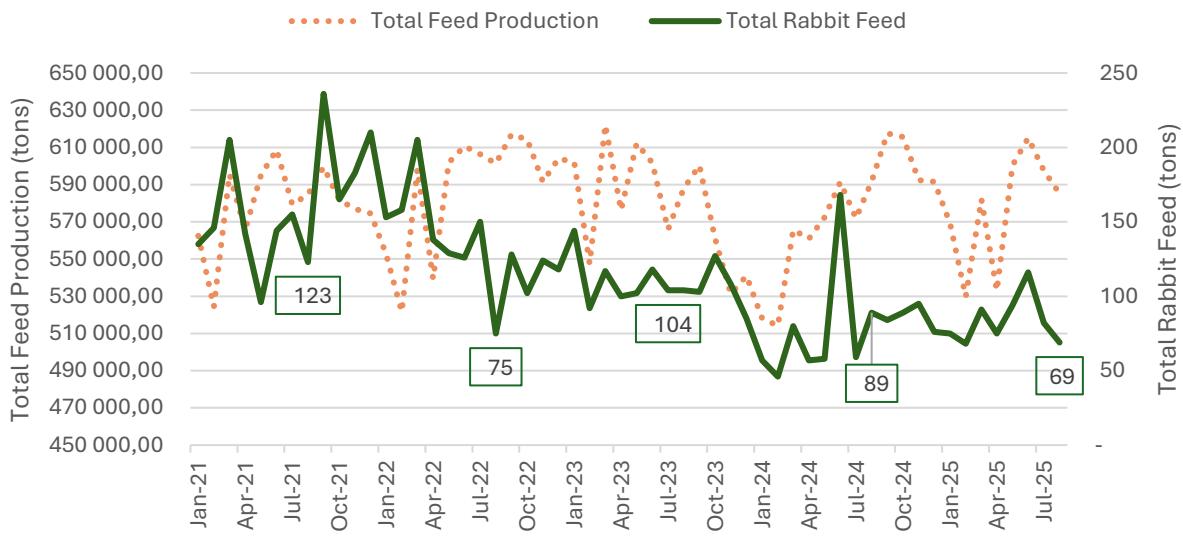
-13  
Month-on-Month  
Difference (Tons)

69  
August 2025

89  
August 2024

-22,5%   
Year-on-Year  
Difference (%)

-20  
Year-on-Year  
Difference (Tons)



The cumulative production of rabbit feed has shown significant volatility over the past three years. Total cumulative production from January to August declined sharply from 881 tons in 2023 to 614 tons in 2024, representing a 30.3% decrease. Production partially recovered in 2025, reaching 670 tons, a 9.1% increase compared to the same period in 2024. On a monthly basis, the industry has faced notable declines. August 2025 recorded a significant year-on-year decrease of 22.5%, dropping from 89 tons in August 2024 to 69 tons, a reduction of 20 tons. The month-on-month comparison similarly reflects a negative trajectory, with production falling 15.9% from July 2025 to August 2025, decreasing from 82 tons to 69 tons, a drop of 13 tons.



## OTHER FEED

914

August 2025

979

July 2025

-6,6%

Month-on-Month  
Difference (%)

-65

Month-on-Month  
Difference (Tons)

914

August 2025

890

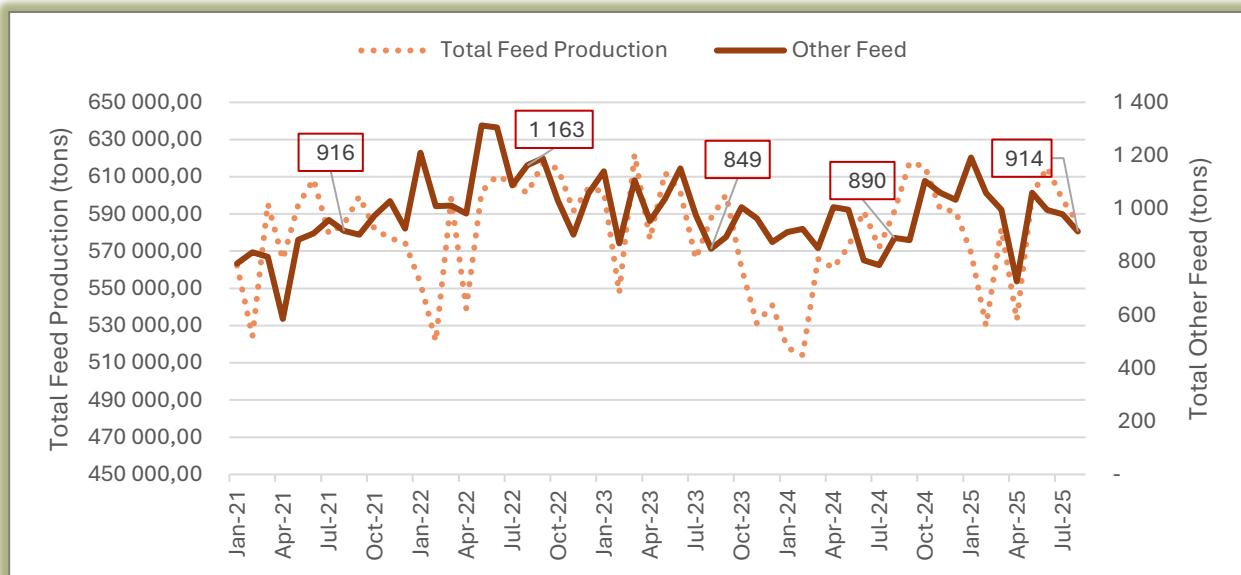
August 2024

+2,7%

Year-on-Year Difference  
(%)

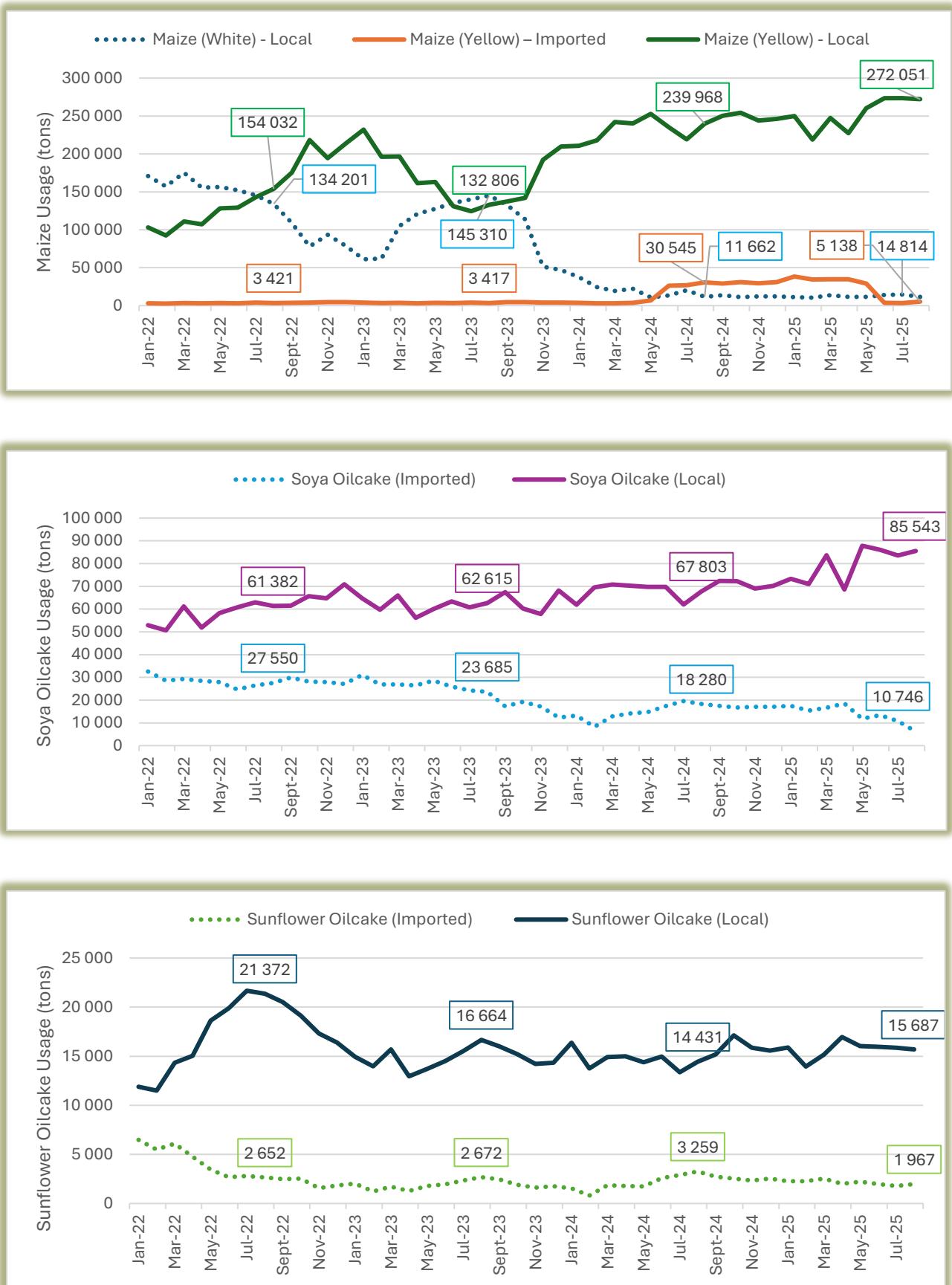
24

Year-on-Year  
Difference (Tons)



The cumulative production of other feed has shown fluctuating trends over the past three years. Total cumulative production from January to August decreased from 8 084 tons in 2023 to 7 173 tons in 2024, reflecting an 11.2% decline. However, production rebounded in 2025 to 7 921 tons, representing a 10.4% increase compared to 2024. This indicates that while the sector faced a downturn in 2024, it managed to recover in 2025. Focusing on the year-on-year comparison for August, production increased by 2.7%, rising from 890 tons in August 2024 to 914 tons in August 2025, an increase of 24 tons. Conversely, month-to-month figures reveal a short-term contraction. Production declined by 6.6% from July to August 2025, decreasing from 979 tons to 914 tons, a reduction of 65 tons.

## RAW MATERIAL USAGE



## GRAIN MARKET DIGEST

The global 2025/26 soybean supply and demand forecast includes lower beginning stocks and production, reduced crush, slightly higher exports, and lower ending stocks. Beginning stocks are lowered 0.2 million tons due to updates to 2024/25 balance sheets. Ending stocks for 2024/25 are lowered for the United States, the EU, and Argentina but higher for Brazil and China. EU ending stocks are lowered due to higher crush. Argentina's 2024/25 balance sheet shows higher exports and crush leading to lower stocks. Brazil's 2024/25 balance sheet includes higher production, increased 2.5 million tons to 171.5 million. Global soybean crush for 2025/26 is reduced 1.7 million tons to 365.0 million. Crush is reduced for India on the lower crop. Crush is reduced for Argentina on lower supplies due to lower beginning stocks and higher exports. Partly offsetting is a 1-million-ton increase to Brazilian crush to 59 million tons, raised in line with the higher crush estimate for the previous marketing year. Global soybean exports for 2025/26 are increased 0.2 million tons to 188.0 million. Exports are raised 0.5 million tons for Brazil and 2.3 million for Argentina, in line with increases in the previous marketing year and large export registrations to date; mostly offsetting are lower shipments for the United States and Ukraine. Global ending stocks are reduced 2.0 million tons to 122.0 million, with lower stocks for Argentina, Brazil, the United States, the EU, Ukraine, and India partly offset by higher stocks for China.

Global oilseed production for 2025/26 is lowered this month mainly on lower soybean and sunflower production partly offset by higher rapeseed and cottonseed. Soybean production is reduced 4.1 million tons on lower output for the United States, Ukraine, and India. Sunflower seed production is lowered 1.0 million tons on lower production for Ukraine, Russia, the EU, and Turkey; partly offsetting is higher sunflower seed production for Argentina. Global rapeseed production is raised 1.3 million tons on higher production for the EU, Australia, Ukraine, and the UK. U.S. oilseed production for 2025/26 is projected to reach 125.8 million tons, a decrease of 1.0 million from the previous estimate. The reduction is attributed to lower soybean production, although it is partially offset by higher peanut and cottonseed output. Soybean production is forecast at 4.3 billion bushels, down 48 million, on lower yields. The soybean yield is projected down 0.5 bushels to 53.0 bushels per acre. Soybean supplies are projected to be 61 million bushels lower than the September forecast, due to lower beginning stocks from the September 30 Grain Stocks report and reduced production.

In November 2025, U.S. corn outlook is for increases in supply, exports, and ending stocks. Total supply is 144 million bushels higher as larger beginning stocks are partially offset by lower production. Corn production is forecast at 16.8 billion bushels, down 62 million from September 2026 on a 0.7-bushel reduction in yield to 186.0 bushels per acre. Harvested area for grain is unchanged at 90.0 million acres. Total use is up 100 million bushels reflecting a higher export forecast. Exports are raised 100 million bushels to 3.1 billion reflecting shipments to date. Inspection data imply exports set a monthly record during September and again in October. With supply rising more than use, corn ending stocks are up 44 million bushels to 2.2 billion. The season-average corn price received by producers is raised 10 cents to \$4.00 per bushel. Global coarse grain production for 2025/26 is forecast 3.2 million tons higher to 1.576 billion tons. This month's 2025/26 foreign coarse grain outlook is for larger production, virtually unchanged trade, and smaller ending stocks. Foreign corn production is forecast higher reflecting increases for Mexico and the EU that are partly offset by a decline for Egypt. Mexico production is raised reflecting greater area expectations. The EU is higher as an increase for France is partially offset by a reduction for Germany. Foreign barley production is raised reflecting increases for the EU, Russia, Argentina, and Ukraine that are partly offset by a cut for the United Kingdom. Major global trade changes include greater corn exports for the United States and South Africa but a reduction for Ukraine. Corn imports are raised for Iran, Egypt, Venezuela, and the United Kingdom, but lowered for China, the EU, and Thailand.

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