

Animal By-product Market to Reach USD 32.0 Billion by 2034, Advancing at 2.7% CAGR: Driven by Resource Recovery

Animal By-product Market will rise from USD 25.2 Bn in 2025 to USD 32.0 Bn by 2034 at 2.7% CAGR, supported by rising demand for animal-derived products.

PUNE, MAHARASHTRA, INDIA, August 28, 2026 /EINPresswire.com/ -- [Animal By-Product Market](#) is entering a more sophisticated phase as industries rethink what happens to animal-derived materials that are not destined for direct human consumption. Bones, blood, fat, offal, hides, feathers, shells, manure and former food products are increasingly being treated as recoverable resources rather than simple waste streams.



Animal by-product Market Report

The scale is substantial. The European Commission estimates that more than 20 million tonnes of animal by-products are generated annually in the European Union from slaughterhouses, food-processing facilities, dairies and fallen stock. These materials can present biological risks if poorly handled, but they also contain valuable nutritional, energetic and functional components.

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Traceability, higher-value uses, and more intelligent conversion technologies will characterise the next stage of animal by-product utilisation.”

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This is changing the strategic role of rendering plants, collection networks, processors and downstream manufacturers. Instead of operating solely around

disposal, the sector is increasingly organized around resource recovery, product quality, traceability and end-use diversification.

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- The modern animal by-product ecosystem is no longer dependent on one application.
- Rendered fats can enter oleochemical and energy pathways, while processed proteins can support selected feed and pet-food applications.
- Other derived materials can move into fertilizers, cosmetics, pharmaceuticals, technical products and biomaterials.
- The European Commission specifically recognizes end-use pathways involving fertilizers, pet food, biofuels, textiles, cosmetics and pharmaceuticals.
- Its regulatory framework also provides for defined “end points,” where certain derived products cease to be regulated as animal by-products once they meet specified safety conditions.
- This creates an important commercial opportunity: processors can increasingly focus on producing application-specific ingredients rather than undifferentiated bulk outputs.

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Historical FAO material estimated that the global rendering industry processed roughly 60 million tonnes of animal by-products annually, illustrating the enormous physical scale of the resource stream. The same material noted that slaughter and processing can remove approximately 33% to 43% of live-animal weight as materials such as fat trim, viscera, bone, blood and feathers.

Today, the opportunity is not simply to process larger volumes. It is to extract more value from each tonne through better separation, quality control and targeted end-use development.

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- Meat and Bone Meal (Market-Leading Protein Stream)
- Feather Meal
- Blood Meal

- Animal Fats

□□□ □□□□□□□: Meat and bone meal leads due to its broad availability, concentrated protein content and cost advantage in permitted animal nutrition applications.

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- Animal Feed (Largest Application Base)
- Pet Food
- Fuel
- Others

□□□ □□□□□□□: Animal feed remains the largest outlet as livestock and poultry producers seek economical protein ingredients with strong nutritional value.

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- Rendering (Established Processing Standard)
- Hydrolysis
- Extraction

□□□ □□□□□□□: Rendering remains dominant because it efficiently converts large volumes of animal residues into commercially valuable protein meals and fats.

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- Direct Sales (Preferred Bulk Procurement Channel)
- Distributors
- Online Platforms

□□□ □□□□□□□: Direct sales lead as large-volume buyers prefer long-term supply agreements, consistent specifications and closer coordination with rendering companies.

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- Livestock Producers (Primary Demand Base)
- Pet Food Manufacturers
- [Biofuel](#) Producers

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Animal-derived materials are being repurposed into various products.

- o Pet food represents one of the clearest examples of how animal-derived residual streams are being repositioned as useful ingredients.
- o Research highlighted by the North American Renderers Association and industry partners found that U.S. pet food sales reached \$51.7 billion in 2024, while approximately 9.8 million tons of pet food were produced using more than 600 ingredients. More than 4 million tons of upcycled ingredients were identified within that production ecosystem.
- o The significance goes beyond volume. Pet owners and manufacturers are paying greater attention to ingredient functionality, nutritional density, responsible sourcing and resource efficiency.
- o This creates room for carefully processed animal-derived ingredients to participate in premium nutrition strategies when they meet applicable safety and formulation requirements.

For more information, visit the Intel Market Research report on animal by-product market:
<https://www.intelmarketresearch.com/animal-by-product-market-11401>

Animal fats are also gaining attention as industrial feedstocks for energy-related applications.

Instead of remaining confined to traditional uses, suitable fats can enter pathways associated with biodiesel and other renewable-energy products.

The European regulatory framework already recognizes processed animal by-products in connection with biofuels and provides mechanisms for certain derived products to reach regulatory end points.

This is particularly important as manufacturers and fuel producers evaluate alternative feedstocks. The strategic question is shifting from “How can this material be disposed of?” to “Which downstream pathway generates the highest safe and compliant value?”

Animal-derived materials are being repurposed into various products.

A particularly relevant 2026 development is the continued regulatory expansion around the use of animal-derived materials in fertilizers.

□ In July 2026, the European Commission notified a draft delegated regulation proposing additional derived animal-by-product materials as component materials in EU fertilising products.

□ The proposal is linked to materials for which an end point had already been established and includes requirements related to safety and labeling. The consultation deadline is September 2026.

This direction reinforces the wider circular-economy model in which nutrients recovered from animal processing can return to agricultural systems rather than being permanently lost from the resource cycle.

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The competitive landscape is increasingly shaped by regulatory capability as much as processing capacity.

EU rules require safe sourcing, treatment, traceability and controlled end uses for animal by-products. In Great Britain, the regulatory environment is similarly active. The government updated its list of approved animal-by-product operating plants in August 2026, following additional updates in February, March, and April, May, June and July.

Such frequent regulatory and establishment updates demonstrate how closely the sector is connected with biosecurity, food safety, trade documentation and environmental controls.

For companies, compliance is therefore becoming part of the value proposition. A processor capable of documenting origin, category, treatment, movement and final application can be better positioned for sophisticated supply chains than one competing solely on processing cost.

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- Technology development is another emerging differentiator. The European Food Safety Authority continues to maintain guidance and application pathways for alternative processing methods for animal by-products, with current regulatory and scientific guidance updated for applicants.
- This creates opportunities for technologies designed to improve material recovery while maintaining biological safety.
- Future development areas may include more precise separation, controlled hydrolysis, improved protein functionality, advanced fat purification, nutrient recovery and specialized conversion processes.

- The most commercially attractive technologies will likely be those capable of combining high recovery rates, consistent output quality, traceability and regulatory acceptance.

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- Darling Ingredients
- Valley Proteins
- SARIA
- Leo Group
- Ridley Corporation
- FASA Group
- Sanimax
- JG Pears
- Advanced Proteins
- Birmingham Hide & Tallow
- West Coast Reduction
- MOPAC
- TerramarChile
- Boyer Valley Company
- PRODIA SAS

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North America has one of the most mature animal by-product ecosystems, supported by large-scale beef, pork and poultry processing. The United States has an established rendering network that converts animal residues into protein meals, fats and specialty ingredients, while the expansion of renewable diesel is creating an additional outlet for rendered fats.

The U.S. Energy Information Administration has highlighted the rapid expansion of renewable diesel production capacity, increasing competition for feedstocks including animal fats and used cooking oils.

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- Rendered fats are gaining importance as renewable-fuel feedstocks.
- Large processors are focusing on higher recovery rates from slaughterhouse residues.
- Established rendering infrastructure provides strong collection and processing advantages.
- Feed, pet nutrition and biofuel markets give producers multiple routes for monetizing

recovered materials.

Europe's animal by-product industry is strongly shaped by regulation. The European Union categorizes animal by-products according to risk and establishes specific requirements for their collection, processing, movement and permitted end uses.

This regulatory structure is encouraging companies to invest in segregation, traceability, controlled processing and documented end-use pathways. Rather than treating compliance purely as an operating requirement, processors are increasingly using quality and traceability to differentiate their products.

Key trends in Europe's animal by-product industry include:

• Greater emphasis on documented sourcing and material classification.

- Continued development of animal-derived fertilizers and soil improvers.
- Growing integration between rendering and circular-economy initiatives.
- Opportunities for processed fats in renewable-energy applications.

Asia Pacific presents a particularly interesting dynamic because major livestock and poultry production centers sit alongside large feed-consuming markets.

China, India, Japan, Australia and Southeast Asia contribute differently to the value chain. China and several Southeast Asian economies provide substantial feed demand, while Australia and other livestock-producing markets generate significant quantities of recoverable animal material.

The region's expanding food-processing infrastructure is also creating opportunities to modernize collection and rendering systems.

Key trends in Asia Pacific's animal by-product industry include:

• Rising animal-protein consumption is increasing the underlying raw-material pool.

- Expanding commercial feed production is strengthening demand for recovered proteins.
- Poultry processing is creating additional opportunities for feather and blood meal.
- Modern rendering facilities can improve utilization of materials previously treated as waste.

Conclusion: Asia Pacific's opportunity comes from the powerful combination of large livestock ecosystems, growing feed consumption and expanding resource-recovery infrastructure.

Report Code: <https://www.intelmarketresearch.com/animal-by-product-market-11401>

Latin America Animal By-Products Market | Market Overview, Key Players, and Growth Opportunities

Latin America has a natural advantage in animal by-products because of its substantial livestock and meat-processing industries. Brazil is particularly important because of its enormous beef and poultry sectors, while Argentina, Chile and other markets contribute across livestock, poultry and aquaculture.

As meat-processing businesses expand their product portfolios, the residual material generated alongside primary meat production becomes an increasingly valuable secondary revenue stream.

Key Market Drivers:

- Meat and bone meal production linked to large livestock-processing operations.
- Poultry-derived protein ingredients from expanding processing activity.
- Rendered fats for feed and energy applications.
- Greater utilization of processing residues within circular production models.

Market Outlook: Latin America is increasingly positioned as a raw-material-rich region where expanding meat exports can simultaneously strengthen the supply of recoverable animal proteins and fats.

Middle East & Africa | Market Overview, Key Players, and Growth Opportunities

The Middle East and Africa currently have less developed rendering infrastructure than the major North American and European markets, but the opportunity is gradually changing as livestock production, poultry processing and organized food systems expand.

Investment in modern slaughtering and processing facilities can create a stronger foundation for collecting and converting animal residues into feed ingredients, fertilizers, fats and other products.

Key Market Drivers:

- Development of localized rendering facilities.
- Better collection and segregation of slaughterhouse residues.
- Growing poultry-processing activity and associated by-product recovery.
- Expansion of livestock and aquaculture feed industries.

□□□□□□□ □□□□: The region's opportunity is less about existing rendering scale and more about building modern recovery infrastructure alongside the expansion of organized meat and poultry processing.

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Animal By-Product Market sits at the intersection of [food processing](#), livestock production, environmental management, renewable energy, animal nutrition, agriculture and specialty manufacturing. That positioning gives the sector an unusually broad opportunity base.

Companies that can transform variable biological materials into safe, traceable and specification-driven ingredients are likely to hold an increasingly important role in future circular supply chains.

The competitive advantage will belong not simply to the largest processors, but to organizations that understand where each material can create its highest compliant value.

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This report is designed to move beyond a conventional overview of animal by-products and examine the market as a connected resource-recovery ecosystem. The analysis can support strategic evaluation of rendering operations, processed proteins, animal fats, pet-food ingredients, fertilizer pathways, bioenergy applications, collection infrastructure, regulatory developments, emerging processing technologies and downstream opportunities.

It is intended for manufacturers, processors, investors, technology providers, ingredient companies, food and feed businesses, sustainability teams and other decision-makers seeking to understand where the next commercial opportunities may emerge within the evolving animal by-product value chain.

Rather than viewing animal by-products solely as residual material, the report frames them as feedstocks with multiple potential destinations - and analyzes the technological, regulatory and commercial factors determining which destination creates the greatest value.

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Rohan

IntelMarketResearch

+91 91691 64321

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