

Calcium Propionate Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

Calcium Propionate Market Summary

Introduction

Calcium Propionate is a widely recognized food and feed preservative, endorsed by the World Health Organization (WHO) and the United Nations Food and Agriculture Organization (FAO) for its safety and reliability. It excels in inhibiting bacterial and mold growth while remaining harmless to yeast, making it a vital component in various industries. In the food sector, Calcium Propionate is extensively utilized in bakery products such as bread and pastries, as well as cereals, vinegar, and soy-based foods, where it extends shelf life and enhances nutritional value by providing essential calcium. In animal feed, it serves as an effective mold inhibitor, preventing spoilage, boosting livestock appetite, and increasing milk yield in dairy cows. Beyond these primary uses, Calcium Propionate finds applications in toothpaste and cosmetics, leveraging its antimicrobial properties. The Calcium Propionate industry operates within the specialty chemicals sector, driven by rising demand from food processing, animal husbandry, and personal care markets.

The global market is highly competitive, with leading players such as Kerry Group, Kemin Industries, and Eastman dominating through innovation and expanded production capacities. China stands as the largest producer and exporter, with significant facilities like JIANGSU MUPRO IFT CORP.'s 25,000-ton plant. However, the industry faces challenges due to its reliance on propionic acid, a key raw material imported from the United States. In 2024, China's Ministry of Commerce imposed a 43.5% anti-dumping tariff on U.S. propionic acid, a decision exacerbated by escalating



U.S.-China trade tensions under the Trump administration. These disruptions introduce significant uncertainty into global supply chains and pricing dynamics. The global Calcium Propionate market is projected to reach USD 75-150 million by 2025, with a compound annual growth rate (CAGR) of 2.5%-4.5% through 2030, propelled by food safety demands but tempered by trade and regulatory hurdles.

Market Size and Growth Forecast

The Calcium Propionate market is expected to achieve a valuation of USD 75-150 million by 2025, with a CAGR ranging from 2.5% to 4.5% extending through 2030. This growth is driven by increasing demand for preservatives in bakery, dairy, and processed food sectors, alongside growing applications in animal feed. The rising consumer focus on food safety and the need for extended shelf life in convenience foods further bolster market expansion. However, challenges such as the 43.5% tariff on U.S. propionic acid imports into China and competition from substitutes like potassium sorbate and sodium benzoate moderate this growth. The forecast reflects a stable market with moderate upward momentum, balancing robust demand with supply chain and competitive pressures.

Regional Analysis

The Calcium Propionate market demonstrates varied regional dynamics shaped by production capacities, consumption trends, and trade policies.

Asia-Pacific: Growth is estimated at 3.0%-5.0%. China leads as the primary producer and exporter, supported by major facilities such as JIANGSU MUPRO IFT CORP.'s 25,000-ton plant and Shandong Sanxu's 4,000-ton food-grade facility launched in late 2024. The region's market trends focus on cost efficiency and capacity expansion to counter trade barriers, though reliance on U.S. propionic acid imports poses risks amid the 43.5% tariff.

North America: Growth ranges from 2.0%-4.0%. The United States is a significant consumer, particularly in bakery and dairy applications. Market trends emphasize innovation in clean-label preservatives and compliance with stringent FDA regulations, indicative of a mature market with consistent demand.

Europe: Growth is projected at 2.5%-4.5%. Key markets like Germany, France, and the UK drive demand in food and feed sectors. Trends highlight sustainable production practices and adherence to rigorous EU food safety standards,



supporting steady market growth.

Rest of the World: Growth is estimated at 1.5%-3.5%. Emerging markets in Latin America and the Middle East show promise, fueled by expanding food processing and livestock industries. Trends include investments in localized production to reduce dependency on imports.

Application Analysis

Calcium Propionate serves diverse applications, each exhibiting distinct growth trajectories and trends.

Food Preservative: Growth is estimated at 3.0%-5.0%. This segment leads the market, driven by its widespread use in bakery, dairy, and processed foods. Calcium Propionate's ability to inhibit mold and bacteria under acidic conditions, while fortifying products with calcium, aligns with trends toward clean-label and nutrient-enhanced formulations, meeting health-conscious consumer demands.

Feed: Growth ranges from 2.5%-4.5%. In animal feed, Calcium Propionate prevents mold and spoilage, enhances livestock health, and improves milk yield in dairy cows. Trends focus on improving feed efficiency and sustainability, supporting steady demand from expanding animal husbandry sectors.

Others: Growth is projected at 2.0%-4.0%. Niche applications in personal care products like toothpaste and cosmetics leverage its antimicrobial properties. Trends center on innovation in specialty formulations, maintaining modest but consistent growth.

Key Market Players

The Calcium Propionate market is shaped by several key producers, each contributing to its competitive landscape.

Kerry Group: A global leader in food ingredients, Kerry Group supplies Calcium Propionate for bakery and dairy applications, emphasizing product innovation and quality.



Kemin Industries: Known for its expertise in preservatives, Kemin caters to both food and feed markets, prioritizing sustainability and regulatory compliance.

Eastman: A prominent chemical company, Eastman provides Calcium Propionate across various applications, leveraging its extensive global supply network.

Shandong Tongtai Weirun Food Technology Co. Ltd.: Operates a 3,500-ton facility in China, serving both food and feed industries with a focus on regional demand.

Eton Food Co. Ltd: Expanded its capacity to 12,000 tons in 2024, targeting both domestic and international markets with a strong production base.

JIANGSU MUPRO IFT CORP.: Leads with a 25,000-ton capacity, focusing on cost efficiency and export-driven growth.

Shandong Sanxu Food Technology Co. Ltd: Launched a 4,000-ton food-grade facility in late 2024, enhancing its supply capabilities for food applications.

Lianyungang Guanmeida Food Ingredients Co. Ltd.: Operates a 5,000-ton facility, supporting the food preservative market with consistent output.

Qihe Huarui Animal Husbandry Co. Ltd.: Specializes in feed applications, catering to the livestock sector's preservative needs.

Shandong Luhu Biotechnology Co. Ltd: Supplies Calcium Propionate for food and feed, emphasizing product quality.

Dawei Bio-engineering Co. Ltd: Provides specialty chemicals, including preservatives, for diverse applications.

Lianyungang Shuren Kechuang Food Additive Co. Ltd.: Serves regional markets with food-grade additives, maintaining a steady presence.

Wuxi Yasuda Chemical Co. Ltd.: Focuses on cost-effective production to meet export demands.

Dr. Paul Lohmann: A European producer, Dr. Paul Lohmann specializes in high-purity Calcium Propionate for food and pharmaceutical uses.



Porter's Five Forces Analysis

The competitive environment of the Calcium Propionate market is influenced by the following forces:

Threat of New Entrants: Low to Moderate. High capital investment and stringent regulatory requirements create barriers to entry, though opportunities in emerging markets could attract niche players.

Bargaining Power of Suppliers: Moderate to High. Suppliers of propionic acid, particularly from the U.S., hold significant leverage due to the 43.5% tariff imposed by China, impacting production costs and supply stability.

Bargaining Power of Buyers: Moderate. Food and feed manufacturers demand high-quality preservatives but have limited supplier options, giving them moderate negotiating power.

Threat of Substitutes: Moderate. Alternatives such as potassium sorbate, sodium benzoate, and sodium diacetate pose competition, yet Calcium Propionate's unique calcium-fortifying benefit sustains its market position.

Industry Rivalry: High. Intense competition among major players like Kerry Group, Eastman, and Chinese producers centers on quality, production capacity, and pricing, heightened by trade uncertainties.

Market Opportunities and Challenges

Opportunities

The growing preference for clean-label preservatives aligns with consumer health trends, increasing Calcium Propionate's appeal in food applications.

Expanding livestock farming in emerging markets drives demand for feed preservatives, creating new growth avenues.

Recent capacity expansions, such as Shandong Sanxu's 4,000-ton facility, strengthen supply resilience and market reach.



Challenges

Trade tariffs, notably the 43.5% anti-dumping duty on U.S. propionic acid, disrupt supply chains and threaten cost stability.

Competition from alternative preservatives like potassium sorbate and sodium diacetate challenges market share.

Stringent regulatory compliance in food and feed sectors elevates operational costs, posing ongoing hurdles.



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