

# Ethoxyquin (EMQ) Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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## Abstracts

### Ethoxyquin (EMQ) Market Summary

#### Introduction

Ethoxyquin (EMQ), a synthetic antioxidant developed by Monsanto in the 1950s, is widely recognized for its role in preserving animal feed and related products. It prevents the oxidation of vitamins A, D, and E, as well as fats and natural pigments, in applications such as premixes, fish meal, and fat-added products. Beyond its primary use in animal nutrition—where it offers mild antifungal and preservative properties—ethoxyquin serves as a food antioxidant, fruit preservative, and rubber anti-aging agent. The industry is characterized by its reliance on chemical stability and cost-effectiveness, yet it faces significant disruption due to regulatory shifts. On August 5, 2022, the European Union enacted Regulation No. 2022/1375, banning ethoxyquin in all animal feed and food categories, effective 20 days later. This regulation prohibits its presence in imported fish meal and agricultural products fed with ethoxyquin-containing feed, accelerating the adoption of substitutes like BHT (butylated hydroxytoluene), BHA (butylated hydroxyanisole), and natural alternatives such as rosemary extract. The global ethoxyquin market is projected to decline to USD 35-70 million by 2030, with a compound annual growth rate (CAGR) of -4.5% to -2.5%, reflecting a challenging landscape driven by regulatory and competitive pressures.

#### Market Size and Growth Forecast

The ethoxyquin market is expected to shrink to USD 35-70 million by 2030, with a CAGR ranging from -4.5% to -2.5%. This contraction stems from the EU's regulatory

ban, which has curtailed demand in a key region for animal feed and aquaculture. The shift toward substitutes, particularly natural antioxidants gaining traction in Europe and North America, further undermines ethoxyquin's market position. While residual demand persists in less regulated markets, the overall outlook suggests a steady decline. This forecast highlights a market grappling with diminishing relevance, as regulatory restrictions and evolving consumer preferences overshadow its historical utility in feed preservation.

## Regional Analysis

The ethoxyquin market varies significantly across regions, influenced by regulatory frameworks and consumption patterns.

**Asia-Pacific:** Growth is estimated at -2% to 0%. China, a major producer and consumer, sustains some demand due to its expansive animal feed sector, though export limitations to the EU temper growth. Trends focus on cost-effective production, with India and Southeast Asia maintaining usage amid evolving regulations.

**North America:** Decline ranges from -4% to -2%. The United States is shifting toward natural antioxidants, driven by consumer demand for sustainable feed solutions and alignment with global standards. Trends emphasize innovation in alternative preservatives.

**Europe:** Decline is projected at -6% to -4%. The EU ban has virtually eliminated ethoxyquin's market, with trends centered on regulatory compliance and widespread adoption of natural substitutes.

**Rest of the World:** Decline is estimated at -3% to -1%. Latin America and Africa retain limited demand in less regulated markets, with trends indicating a gradual pivot to alternatives as global norms influence local practices.

## Application Analysis

Ethoxyquin's applications reflect varying degrees of decline, shaped by regulatory and substitution trends.

**Complete Formula Feed:** Decline is estimated at -3% to -1%. As a historically

dominant segment, it faces pressure from the EU ban and alternative adoption, with trends focusing on reformulating feed to meet new standards.

**Feed Oils and Fats:** Decline ranges from -4% to -2%. This application is contracting as producers adopt BHT and BHA, with trends emphasizing cost-effective antioxidant blends.

**Meat and Bone Meal:** Decline is projected at -3% to -1%. Usage persists in less regulated regions, with trends prioritizing affordability in animal nutrition.

**Fish Meal:** Decline ranges from -5% to -3%. Heavily impacted by the EU ban, trends shift toward natural antioxidants in aquaculture, particularly in Europe and North America.

**Vitamins:** Decline is estimated at -2% to 0%. This niche segment sustains limited demand for preserving high-value vitamin formulations, with trends reflecting resilience in specialized uses.

**Premix:** Decline ranges from -3% to -1%. Some markets maintain usage, but trends indicate a slow transition to substitutes as regulations tighten.

## Key Market Players

The ethoxyquin market features key producers navigating a shrinking landscape.

**Huai'An Runlong Technology Co. Ltd.:** A Chinese firm specializing in feed antioxidants, targeting cost-effective solutions for regional markets.

**Jiangsu Litian Technology Co. Ltd.:** With a 10,000-ton capacity, this company focuses on quality and compliance, serving both domestic and select export markets.

**Jiangsu Zhongdan Group:** Through its subsidiary Taixing Ruitai Chemical Co. Ltd., with a 10,000-ton capacity, it targets animal nutrition markets, optimizing production efficiency.

**Skystone Feed Co. Ltd.:** Operating a 3,000-ton facility, this producer focuses on niche applications, ensuring supply chain reliability.

These companies adapt to declining demand by focusing on efficiency and specific market segments.

## Porter's Five Forces Analysis

The competitive dynamics of the ethoxyquin market are shaped by these forces:

**Threat of New Entrants:** Low. High regulatory barriers and specialized production needs deter new competitors, favoring established players.

**Bargaining Power of Suppliers:** Moderate. Suppliers of raw materials like quinoline derivatives hold some influence, but diverse sourcing options limit their leverage.

**Bargaining Power of Buyers:** High. The availability of substitutes like BHT, BHA, and natural antioxidants empowers buyers to negotiate or switch, enhancing their power.

**Threat of Substitutes:** High. Regulatory bans and the rise of cost-competitive and natural alternatives significantly challenge ethoxyquin's position.

**Industry Rivalry:** Moderate. Competition among existing players focuses on cost efficiency and retaining share in a declining market, rather than aggressive expansion.

## Market Opportunities and Challenges

### Opportunities

Residual demand in less regulated markets, such as parts of Asia and Latin America, provides a temporary buffer for producers.

Niche applications like vitamin preservation offer limited avenues for sustaining relevance.

### Challenges

Stringent regulations, particularly in Europe, severely limit market potential, accelerating ethoxyquin's decline.

Rapid adoption of substitutes like BHT, BHA, and rosemary extract erodes demand across key applications.

Growing environmental and health concerns further diminish ethoxyquin's appeal, pushing it toward obsolescence.

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