SCOTTS INTERNATIONAL

# Alcohol Ethoxylates - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

**AVAILABLE LICENSES:**

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

**Report description:**

Alcohol Ethoxylates Market Analysis

The Alcohol Ethoxylates Market size is estimated at 3.53 Million tons in 2025, and is expected to reach 4.22 Million tons by 2030, at a CAGR of 3.60% during the forecast period (2025-2030). The moderate expansion reflects a maturing demand curve even as new sustainability rules tighten around ethylene oxide emissions. Producers are responding with bio-based feedstock programs and narrower-range ethoxylation technologies that cut energy intensity and improve biodegradability. Strong personal-care and institutional cleaning demand in high-growth Asian economies, plus the build-out of downstream oleochemical capacity in Indonesia and Brazil, underpin steady volume gains. At the same time, regulatory pressure in North America and Europe forces manufacturers to upgrade emission controls, adding cost yet accelerating innovation toward low-carbon surfactant grades. These cross-currents define a competitive arena where technical differentiation and verified sustainability credentials outweigh pure scale economies.

Global Alcohol Ethoxylates Market Trends and Insights

Growing Personal-Care & Home-Care Demand in Asia-Pacific

Sustained urbanization and income growth in China, India, and Southeast Asia continue to lift premium personal-care consumption. Formulators favor alcohol ethoxylates for their mildness and cold-water detergency, traits well matched to concentrated liquid detergents popular in these markets. Multinationals expand sustainable portfolios certified under biomass balance schemes, signaling a pivot toward lower-carbon surfactant supply chains. Retail migration to e-commerce platforms further amplifies product differentiation, pushing suppliers to deliver transparent sustainability data alongside sensory performance claims.

Rising Use in Industrial & Institutional Cleaning Formulations

Elevated hygiene protocols across healthcare, food service, and transport hubs remain in force even after the pandemic peak. Alcohol ethoxylates provide effective soil removal over broad pH and temperature bands and deliver stable performance in hard-water conditions, enabling formulators to meet tightened disinfection standards without phosphates or solvents. Growth is strongest in North America and Western Europe, where regulatory mandates for occupational health drive demand for low-irritancy, readily biodegradable surfactants.

Feedstock Price Volatility

Swing pricing for ethylene oxide and fatty alcohols compresses margins for smaller producers lacking hedging programs or vertical integration. Recent glycol ether increases announced by a major North American supplier underscore the upward pressure on ethoxylation costs. Import-reliant formulators in South Asia face the greatest exposure due to currency risk and freight surcharges.

Other drivers and restraints analyzed in the detailed report include:

Expanding Downstream Oleochemical Capacity / Rising Awareness Regarding Hygiene and Cleanliness / Growing Environmental Concerns /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Oleochemical grades captured 58.19% of alcohol ethoxylates market share in 2024 and will grow faster than petrochemical peers at a 3.91% CAGR. Vertical integration in Southeast Asia assures feedstock certainty and lowers logistics emissions. Corporate procurement policies that mandate renewable carbon content continue to migrate volumes toward bio-based supply. Producers in Europe and North America respond by certifying plants under ISCC PLUS and ramping green ethylene oxide output, which moderates the petrochemical retreat but does not reverse the trend.

The oleochemical segment benefits from palm and coconut oil distillation clusters near Jakarta and Kuala Lumpur that feed local ethoxylation units at lower cost. Producers marketing narrow-range technology achieve premium pricing by offering grade consistency required in personal-care emulsions. Nevertheless, petrochemical variants retain a foothold in cost-sensitive commodity detergents where carbon disclosure remains voluntary.

The C12-C14 cut constituted 41.55% of the alcohol ethoxylates market size in 2024, enjoying a 4.08% growth trajectory. Its balance of detergency and ready biodegradation meets evolving regional regulations. Shorter C9-C11 homologues gain traction in industrial cleaning where rapid wetting is prized, while longer C15-C18 chains serve premium personal-care and oilfield chemistries.

Formulators increasingly request narrow-range C12-C14 ethoxylates that minimize free alcohol content, improving odor and product stability. Research has also explored branched analogues that resist crystallization at low temperature, broadening usage in winter-grade vehicle washes.

The Alcohol Ethoxylates Market Report Segments the Industry by Origin Type (Oleochemical and Petrochemical), Carbon Chain Length (C9-C11 (Linear Alcohol Ethoxylates), C12-C14 (Lauryl Alcohol Ethoxylates), and More), Form (Liquid and Paste/Solid), Application (Personal Care, Soap and Detergents, and More), and Geography (Asia-Pacific, North America, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific anchored 52.18% of alcohol ethoxylates market size in 2024 and leads growth at 4.76% CAGR through 2030. Rising disposable income, expanding retail detergent penetration, and robust oleochemical feedstock supplies attract both local independents and multinational majors. Indonesia's new fatty alcohol complexes supply ethoxylation units that serve regional personal-care hubs in Singapore and Thailand, tightening intra-Asian trade loops and curbing import reliance on Europe.

North America presents a mature, innovation-led environment where environmental health and safety regulations dominate procurement decisions. The US Environmental Protection Agency's tolerance exemption for ethoxylated propoxylated C12-C15 alcohols in agrochemical use underscores the technology's accepted safety profile in crop protection. Producers emphasize green chemistry upgrades and digitalized supply tracking to comply with brand-owner transparency programs.

Europe faces a stricter policy backdrop as the revision of Regulation 648/2004 rolls in digital product passports and enhanced biodegradability thresholds. While demand growth is modest, suppliers enjoy premium pricing for verified sustainable grades. Latin America benefits from an enhanced supply position following a major petrochemical group's acquisition of Brazil's largest ethoxylate producer, ensuring regional customers receive local, lower-freight product. The Middle East and Africa record smaller volumes but exhibit keen interest in concentrated liquid detergents, a format that favors high-actives alcohol ethoxylates.

List of Companies Covered in this Report:

BASF / Clariant / Croda International plc / Dow / Evonik Industries AG / Huntsman International LLC / India Glycols Limited / Indorama Ventures Public Company Limited / Kao Chemicals Europe, S.L.U. / Kemipex / Mitsui Chemicals Inc. / Nouryon / Procter & Gamble / SABIC / Sasol Ltd / Shell plc / Stepan Company / Syensqo / Thai Ethoxylate Co., Ltd. (TEX) /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

**Table of Contents:**

4.2.1 Growing personal-care & home-care demand in Asia-Pacific
4.2.2 Rising use in industrial & institutional cleaning formulations
4.2.3 Expanding downstream oleochemical capacity
4.2.4 Rising awareness regarding hygiene and cleanliness
4.2.5 Growing usage in agrochemicals for crop protection
4.3 Market Restraints
4.3.1 Feedstock price volatility
4.3.2 Growing environmental concerns
4.3.3 Availability of suitable alternatives
4.4 Value Chain Analysis
4.5 Porter's Five Forces
4.5.1 Bargaining Power of Suppliers
4.5.2 Bargaining Power of Buyers
4.5.3 Threat of New Entrants
4.5.4 Threat of Substitutes
4.5.5 Degree of Competition

5 Market Size & Growth Forecasts (Volume)
5.1 By Origin Type
5.1.1 Oleochemical-derived
5.1.2 Petrochemical-derived
5.2 By Carbon Chain Length
5.2.1 C9-C11 (Linear Alcohol Ethoxylates)
5.2.2 C12-C14 (Lauryl Alcohol Ethoxylates)
5.2.3 C15-C18 & Branched (Steryl Alcohol Ethoxylates)
5.3 By Form
5.3.1 Liquid
5.3.2 Paste / Solid
5.4 By Application
5.4.1 Personal Care
5.4.2 Soaps and Detergents
5.4.3 Industrial and Institutional Cleaning
5.4.4 Agricultural Chemicals
5.4.5 Paints and Coatings
5.4.6 Textile Processing
5.4.7 Other Applications (Oil & Gas (EOR, drilling fluids))
5.5 Geography
5.5.1 Asia-Pacifc
5.5.1.1 China
5.5.1.2 India
5.5.1.3 Japan
5.5.1.4 South Korea
5.5.1.5 ASEAN Countries
5.5.1.6 Rest of Asia-Pacific
5.5.2 North America
5.5.2.1 United States
5.5.2.2 Canada

**Alcohol Ethoxylates - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-07-01 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

| Select license | License | Price |
|---|---|---|
| | Single User License | $4750.00 |
| | Team License (1-7 Users) | $5250.00 |
| | Site License | $6500.00 |
| | Corporate License | $8750.00 |
| | VAT | |
| | Total | |

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.
** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

| | | | |
|---|---|---|---|
| Email* | | Phone* | |
| First Name* | | Last Name* | |
| Job title* | | | |
| Company Name* | | EU Vat / Tax ID / NIP number* | |
| Address* | | City* | |
| Zip Code* | | Country* | |
| | | Date | 2026-02-27 |
| | | Signature | |

**Scotts International. EU Vat number: PL 6772247784**
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

**Scotts International. EU Vat number: PL 6772247784**
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com