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Global Biosurfactants Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Biosurfactants market size is expected to reach $ 233 million by 2032, rising at a market growth of 5.7% CAGR during the forecast period (2026-2032).

Biosurfactants are surface-active, amphiphilic biomolecules synthesized by microorganisms—such as bacteria, fungi, and yeasts—under specific cultivation conditions, or through enzymatic catalysis. Composed of a hydrophilic moiety (typically carbohydrates, amino acids, or phosphate groups) and a lipophilic moiety (such as fatty acid chains), these molecules effectively reduce surface and interfacial tensions. Compared to conventional petroleum-based synthetic surfactants, biosurfactants offer key market advantages, including superior biodegradability, lower ecotoxicity, environmental friendliness, high stability under extreme temperatures or salinities, and sustainable production from renewable resources.

Key Findings

Global biosurfactant production reached 12.9 thousand tons on an active-ingredient-equivalent basis in 2025

The weighted average selling price reached US$12,035 per ton in 2025

Rhamnolipids sophorolipids lipopeptides and MELs constitute the principal commercial biosurfactant families

Personal care demand is concentrated in facial skincare body care and scalp and hair

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care

Industrial fermentation scale-up is expanding biosurfactants from specialty ingredients toward wider commercial applications

Market Trends

The biosurfactants industry is transitioning from laboratory-scale and specialty production toward larger industrial fermentation platforms, while competitive differentiation is shifting from simply achieving fermentation yield toward control of molecular composition, purity, color, odor, active concentration and formulation performance. Evonik has established industrial-scale rhamnolipid manufacturing, while Holiferm continues to scale sophorolipid production and commercial formats; Syensqo is developing high-active sophorolipid grades specifically for skin, hair and scalp applications. Product development increasingly focuses on application-specific molecules and grades rather than generic biosurfactant concentrates. In personal care, mild cleansing, skin-barrier compatibility, microbiome-friendly positioning, solubilization and multifunctionality are becoming important selling points. At the manufacturing level, strain improvement, fermentation productivity, foam control, downstream separation, decolorization and formulation stability remain key areas of process optimization. The industry is also broadening from liquid products toward higher-active and solid formats that can lower logistics costs and improve formulation flexibility.

Market Dynamics

Drivers

Demand is supported by the transition toward renewable and biodegradable surfactant systems and by formulators seeking ingredients that combine cleansing or emulsification with additional biological and sensory functions. Personal care is particularly attractive because biosurfactants can compete on mildness, multifunctionality and natural-origin positioning rather than solely on commodity surfactant cost. Expansion of industrial fermentation capacity is also improving supply reliability and allowing producers to address larger-volume applications. Evonik’s commercialization of industrial-scale rhamnolipids and Holiferm’s expansion of commercial sophorolipid production illustrate the movement toward more scalable supply.

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Restraints

Production economics remain the principal constraint. Fermentation requires tight control of microorganisms, feedstocks, aeration, foam and process conditions, while downstream recovery and purification can represent a significant portion of manufacturing complexity. Product concentration also varies widely between fermentation broth, concentrated material and high-purity grades, creating substantial price differences and making direct tonnage comparisons difficult. In cost-sensitive applications, conventional petrochemical and oleochemical surfactants retain advantages in mature supply chains, specification standardization and very large-scale manufacturing.

Opportunities

The strongest opportunity lies in moving biosurfactants from single-function surfactant replacement toward multifunctional formulation ingredients. Facial cleansers, micellar products, body washes, shampoos and scalp treatments can use biosurfactants for cleansing, emulsification and solubilization while also emphasizing mildness and skin or scalp compatibility. Beyond personal care, home care, agriculture, environmental applications and oilfield chemicals provide additional volume potential. Holiferm has extended sophorolipids into home care and agriculture, while Toyobo is commercializing MEL-based solutions for agricultural wetting and spreading, demonstrating the ability of established biosurfactant platforms to enter new downstream markets.

Challenges

Commercial success depends on achieving consistent product composition across fermentation batches while lowering effective application cost. Different congeners within rhamnolipids, sophorolipids, lipopeptides and MELs can produce materially different foaming, emulsification, solubilization and biological properties, increasing formulation and quality-control requirements. Producers must therefore balance fermentation yield with downstream purity, active concentration and molecular profile. Scaling capacity faster than qualified downstream demand could also pressure utilization rates, while insufficient application-development support may slow substitution in formulations already optimized around conventional surfactants.

Industry Chain Analysis

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The upstream chain consists primarily of renewable carbon sources such as sugars, vegetable oils and other fermentation feedstocks, together with microbial strains, fermentation nutrients and processing aids. Midstream value creation centers on strain development, fermentation, foam and process control, separation, purification, concentration, decolorization, drying and formulation. The difference between fermentation broth and high-purity active material is particularly important because downstream processing strongly influences product cost and selling price. Downstream customers include personal care formulators, household and industrial cleaning suppliers, agricultural-input companies, environmental-service providers and oilfield chemical users. Higher-value suppliers increasingly combine molecule production with formulation development and application testing rather than selling fermentation output alone.

Segment Insights

Rhamnolipid, Sophorolipid, Lipopeptides and Mannosylerythritol Lipid represent distinct commercial platforms rather than interchangeable products. Rhamnolipids offer strong wetting, detergency, foaming and emulsification performance and are increasingly available in differentiated purity and congener grades. Sophorolipids have reached comparatively advanced industrialization and are used across personal care, home care and other formulations, with acidic-rich and lactonic-rich compositions enabling different performance profiles. Lipopeptides such as surfactin occupy a higher-functionality segment characterized by very low effective concentrations and strong interfacial activity. MELs remain a more specialized glycolipid platform, with opportunities in cosmetics and agricultural formulations. Product competition is therefore increasingly determined by molecular functionality, active content and downstream formulation compatibility rather than by biosurfactant identity alone.

Downstream Market Opportunities

Agricultural and Petroleum Industry offer substantial industrial-volume potential because biosurfactants can improve wetting, spreading, emulsification and oil-water interfacial behavior. Environmental Protection is a differentiated growth area where biodegradability and hydrocarbon mobilization support remediation and wastewater-treatment applications. Cosmetics and Daily Chemicals provide higher-value demand for mild and multifunctional ingredients, while Food Industry applications focus on emulsification, stabilization and processing functionality. Pharmaceutical applications remain more technically demanding and typically require higher purity, tighter quality control and stronger safety documentation, but they also provide opportunities for

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specialized high-value products. The diversified application structure reduces dependence on any single downstream industry and supports differentiated product grades and pricing strategies.

Regional Insights

Europe has emerged as an important industrialization center, supported by Evonik's rhamnolipid platform in Slovakia, Syensqo's sophorolipid-based beauty ingredients and Holiferm's expanding UK production. North America retains a strong specialist ecosystem around rhamnolipids and fermentation technologies, represented by Jeneil Biotech and AGAE Technologies. Asia combines differentiated Japanese technologies with an increasingly substantial Chinese fermentation base: Toyobo Corporation is advancing MEL commercialization, Kaneka Corporation supplies surfactin, while Chinese producers cover rhamnolipids and industrial lipopeptides. Regional competition is therefore differentiated between high-value specialty formulations, industrial fermentation scale and cost-oriented bulk applications.

Competitive Landscape Analysis

Competition is increasingly organized around distinct technology platforms. Evonik has established a strong position in industrial-scale rhamnolipids, while Jeneil Biotech and AGAE Technologies focus on specialized rhamnolipid products. Syensqo, Holiferm and Allied Carbon Solutions are active in sophorolipid commercialization, Toyobo Corporation has developed a differentiated position in Mannosylerythritol Lipid, and Kaneka Corporation is positioned in surfactin-type lipopeptides. TensioGreen covers both rhamnolipids and lipopeptides. In China, Shaanxi Deguan Biotechnology, Xi'an Rege Biotechnology and Zhejiang SILVER-ELEPHANT BIO-ENGINEERING participate mainly in glycolipid biosurfactants, while Daqing Huali Biotechnology and Bloomage Biotechnology Corporation Limited strengthen the supply base for lipopeptides. Competitive differentiation increasingly depends on fermentation scale, production cost, downstream purification capability, active concentration, product consistency and application-development capability.

Report Scope

This report studies the global Biosurfactants production, demand, key manufacturers,

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and key regions.

This report is a detailed and comprehensive analysis of the world market for Biosurfactants and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Biosurfactants that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Biosurfactants total production and demand, 2021-2032, (Tons)

Global Biosurfactants total production value, 2021-2032, (USD Million)

Global Biosurfactants production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Biosurfactants consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Biosurfactants domestic production, consumption, key domestic manufacturers and share

Global Biosurfactants production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Biosurfactants production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Biosurfactants production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Biosurfactants market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Evonik, Jeneil Biotech, AGAE Technologies, Allied Carbon Solutions, Holiferm, Syensqo, Stepan, Locus FS, GlycoSurf, SARAYA

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Co., Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Biosurfactants market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Tons) and average price (US$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Biosurfactants Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

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Global Biosurfactants Market, Segmentation by Type:

Rhamnolipid

Sophorolipid

Lipopeptides

Mannosylerythritol Lipid (MEL)

Others

Global Biosurfactants Market, Segmentation by Product Type:

Powder

Liquid

Global Biosurfactants Market, Segmentation by Active Ingredient Content:

Active Ingredient Content <50%

Active Ingredient Content 50%-80%

Active Ingredient Content 80%-99%

Active Ingredient Content >99%

Global Biosurfactants Market, Segmentation by Application:

Agriculture

Oil Industry

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Environmental Protection

Food Industry

Cosmetics and Daily Chemicals

Pharmaceuticals

Others

Companies Profiled:

Evonik

Jeneil Biotech

AGAE Technologies

Allied Carbon Solutions

Holiferm

Syensqo

Stepan

Locus FS

GlycoSurf

SARAYA Co., Ltd.

Toyobo Corporation

TensioGreen

Kaneka Corporation

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Shaanxi Deguan Biotechnology

Daqing Huali Biotechnology

Xi'an Rege Biotechnology

Shandong Aikang Biotechnology

Zhejiang SILVER-ELEPHANT BIO-ENGINEERING

Bloomage Biotechnology Corporation Limited

Shandong Qilu Biotechnology Group

Key Questions Answered

1. How big is the global Biosurfactants market?
2. What is the demand of the global Biosurfactants market?
3. What is the year over year growth of the global Biosurfactants market?
4. What is the total value of the global Biosurfactants market?
5. Who are the Major Players in the global Biosurfactants market?
6. What are the growth factors driving the market demand?

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