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Global Glycolipid Biosurfactant Supply, Demand and Key Producers, 2026-2032

https://marketpublishers.com/r/G6A53079DDF5EN.html
Date: November 2026
Pages: 147
Price: US$ 4,480.00 (Single User License)
ID: G6A53079DDF5EN

Abstracts

The global Glycolipid Biosurfactant market size is expected to reach $ 96 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

Glycolipid biosurfactants, representing the most commercially advanced and widely adopted category within the biosurfactant family, are amphiphilic carbohydrate derivatives produced via microbial fermentation. Their molecular structure consists of a hydrophilic carbohydrate moiety (such as rhamnose, glucose, sophorose, or trehalose) covalently linked to a lipophilic fatty acid chain through ester or glycosidic bonds. Due to their exceptional surface activity, superior emulsifying properties, and low ecotoxicity, glycolipids have achieved large-scale substitution in high-value markets including household detergents, personal care, enhanced oil recovery, and modern agriculture, serving as a pivotal bio-based raw material driving the green chemistry transition and carbon neutrality goals.

Key Findings

Global Glycolipid Biosurfactant production reached approximately 12,180 tons in 2025

The weighted average selling price reached approximately US$5,465 per ton in 2025

Rhamnolipids and sophorolipids constitute the principal commercial glycolipid biosurfactant categories

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Mannosylerythritol lipids remain a more specialized segment oriented toward functional and higher-value applications

Market Trends

The Glycolipid Biosurfactant industry is moving from specialty fermentation products toward larger-volume industrial ingredients. Commercial development is increasingly focused on improving fermentation productivity, reducing downstream separation costs, raising active content and enabling direct incorporation into established formulations. Rhamnolipids have entered industrial-scale manufacturing, while sophorolipid suppliers are expanding production and developing acidic, lactonic and application-specific grades. At the same time, second-generation feedstocks, agricultural side streams and other renewable carbon sources are being introduced to reduce feedstock cost and improve sustainability profiles. Product development is also shifting from simple replacement of conventional surfactants toward multifunctional performance, including mild cleansing, wetting, dispersion, emulsification, microbiome-compatible personal care, agricultural adjuvancy and industrial interfacial control. Evonik has industrialized fermentation-based rhamnolipids, while Holiferm continues to expand commercial sophorolipid manufacturing; Stepan and Syensqo have introduced differentiated sophorolipid grades for cleaning and personal care formulations.

Market Dynamics

Drivers

The main growth driver is the transition of surfactant-consuming industries toward renewable, biodegradable and lower-toxicity ingredients without sacrificing formulation performance. Personal care, home care and industrial cleaning customers increasingly require ingredients combining natural-origin positioning with cleansing, emulsification and wetting performance. Agriculture, environmental remediation and petroleum applications additionally benefit from low interfacial tension and compatibility with biological systems. Industrial-scale fermentation and rising production capacity are gradually improving supply reliability, which is essential for glycolipid biosurfactants to move beyond niche applications.

Restraints

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Production economics remain the principal constraint. Fermentation yield, fermentation time, foaming control, feedstock cost and downstream recovery can materially affect manufacturing cost. Commercial products also differ substantially in active content and purity, making direct price comparison difficult. High-purity rhamnolipids, specialty congeners and refined MEL products remain considerably more demanding to manufacture than conventional commodity surfactants. In mass-market applications, formulators therefore evaluate biosurfactants on total formulation performance and effective dosage rather than simply replacing conventional surfactants on a one-for-one basis.

Opportunities

The strongest opportunities are emerging from formulation optimization rather than complete surfactant replacement. Glycolipid biosurfactants can function as co-surfactants, wetting agents, emulsifiers and performance enhancers, allowing customers to reduce conventional surfactant loading while maintaining functionality. Agriculture represents an important expansion area through spray wetting, spreading, soil penetration and biological formulation compatibility. Industrial coatings, mining, water treatment and other interfacial applications are also being developed, while MEL commercialization is broadening from cosmetics toward agricultural and functional-material applications.

Challenges

The industry must balance scale, cost, product consistency and application-specific performance. Fermentation-derived glycolipids can contain multiple molecular congeners, and changes in feedstock, strain or downstream processing can alter acidic/lactonic ratios, mono-/di-rhamnolipid composition, purity and formulation behavior. Qualification cycles are particularly demanding in cosmetics, food and pharmaceutical applications. Producers therefore need robust fermentation control, standardized active-content specifications, reliable downstream processing and sufficient production scale to achieve repeatable commercial performance.

Industry Chain Analysis

The upstream industry consists mainly of renewable carbon sources including glucose and other sugars, vegetable oils, fatty-acid-containing feedstocks, agricultural side

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streams, fermentation nutrients and microbial strains. Midstream production includes strain cultivation, aerobic fermentation, separation, concentration, purification, decolorization, drying and formulation. Manufacturing competitiveness is determined by fermentation yield, reactor productivity, raw-material utilization, downstream recovery efficiency and the required purity level. Downstream value is created through formulation into personal care and household cleaning products, agricultural inputs, oilfield chemicals, environmental remediation agents, food ingredients, pharmaceutical formulations and specialty industrial systems. The value chain is increasingly shifting from selling generic fermentation broth toward standardized high-active grades and application-specific formulations.

Segment Insights

Sophorolipids currently have a broad commercial supplier base and are available in acidic-rich, lactonic-rich and mixed forms, supporting cleaning, personal care, agriculture and industrial uses. Their relatively mature fermentation route and flexible product composition make them an important volume segment. Rhamnolipids offer strong wetting, foaming and interfacial properties and are undergoing accelerated industrialization as large-scale fermentation capacity becomes available. MELs remain comparatively specialized, with commercialization centered on their distinctive moisturizing, penetration and surface-active properties. Toyobo is expanding MEL development beyond cosmetic ingredients into agriculture and other functional applications.

Downstream Market Opportunities

Cosmetics and daily chemicals represent the most mature high-value commercialization field, where glycolipid biosurfactants are used for mild cleansing, emulsification, solubilization and formulation differentiation. Agriculture is developing rapidly as biosurfactants improve spreading, wetting, nutrient or active uptake and compatibility with biological crop-protection systems. Petroleum and environmental applications exploit interfacial-tension reduction, emulsification and contaminant mobilization, while food and pharmaceutical markets offer longer-term opportunities where purity, safety, consistency and regulatory qualification can support higher-value specialty grades.

Regional Insights

Europe is one of the most active regions for industrial-scale commercialization,

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supported by large fermentation investments and expanding use in personal care, home care and specialty industrial formulations. North America maintains strong capabilities in rhamnolipid fermentation and specialty product development, particularly for agriculture, cleaning and industrial applications. China has developed a diversified production base covering rhamnolipids and sophorolipids for agriculture, oilfield, environmental, daily chemical and high-purity applications. Japan retains distinctive capabilities in sophorolipids and MELs, with emphasis on functional ingredients and advanced application development.

Competitive Landscape Analysis

Competition is increasingly differentiated by glycolipid type, fermentation scale, downstream purification capability and application development. Evonik has established a strong position in industrial-scale rhamnolipids, while Jeneil Biotech and AGAE Technologies have long-standing rhamnolipid manufacturing and product-development capabilities. Holiferm, Allied Carbon Solutions, Syensqo and Stepan are important participants in sophorolipids, with competition centered on fermentation economics, acidic/lactonic composition and formulation performance. Locus FS emphasizes industrial glycolipid formulations, Toyobo Corporation focuses on MEL technology, SARAYA Co., Ltd. has established sophorolipid application expertise, and TensioGreen supplies rhamnolipid grades for industrial uses. In China, Shaanxi Deguan Biotechnology has developed both rhamnolipid and sophorolipid portfolios, while Xi'an Rege Biotechnology, Shandong Aikang Biotechnology, Zhejiang SILVER-ELEPHANT BIO-ENGINEERING and Shandong Qilu Biotechnology Group participate in different glycolipid product and application segments. The competitive focus is shifting from simply demonstrating fermentation capability toward consistent large-scale supply, lower manufacturing cost, controlled molecular composition and customer-specific formulation support.

Report Scope

This report studies the global Glycolipid Biosurfactant production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Glycolipid Biosurfactant and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and

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competition, as well as details the characteristics of Glycolipid Biosurfactant that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Glycolipid Biosurfactant 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 Co., Ltd., etc.

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

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Glycolipid Biosurfactant 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 Glycolipid Biosurfactant Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Glycolipid Biosurfactant Market, Segmentation by Type:

Rhamnolipid

Sophorolipid

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Mannosylerythritol Lipids

Others

Global Glycolipid Biosurfactant Market, Segmentation by Product Form:

Powder

Liquid

Global Glycolipid Biosurfactant 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 Glycolipid Biosurfactant Market, Segmentation by Application:

Agricultural

Petroleum Industry

Environmental Protection

Food Industry

Cosmetics and Daily Chemicals

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Pharmaceutical

Others

Companies Profiled:

Evonik

Jeneil Biotech

AGAE Technologies

Allied Carbon Solutions

Holiferm

Syensqo

Stepan

Locus FS

GlycoSurf

SARAYA Co., Ltd.

Toyobo Corporation

TensioGreen

Shaanxi Deguan Biotechnology

Xi'an Rege Biotechnology

Shandong Aikang Biotechnology

Zhejiang SILVER-ELEPHANT BIO-ENGINEERING

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Shandong Qilu Biotechnology Group

Key Questions Answered

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

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