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

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Abstracts

The global Glycolipids 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 are amphiphilic compounds produced by microorganisms, characterized by a molecular structure where a hydrophilic carbohydrate moiety is covalently linked to a hydrophobic fatty acid chain. They are highly effective at reducing surface and interfacial tensions, possessing excellent emulsifying, foaming, and wetting properties. Due to their exceptional biodegradability, low ecological toxicity, and superior surface activity, they hold immense potential for applications in eco-friendly cosmetics, bioremediation, microbial enhanced oil recovery, and pharmaceuticals.

Key Findings

Global Glycolipids Biosurfactant production reached approximately 12.18 thousand tons in 2025

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

Rhamnolipids and sophorolipids represent the two principal industrialized glycolipid biosurfactant families

Industrial-scale fermentation and application-specific product grades are accelerating commercial adoption

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Market Trends

The Glycolipids Biosurfactant industry is shifting from laboratory-scale and specialty supply toward larger-scale fermentation and formulation-oriented commercialization. The major technology direction is no longer limited to improving fermentation yield; producers are increasingly optimizing the complete process from strain selection and renewable feedstock utilization to foam control, downstream separation, decolorization, molecular composition adjustment and high-active formulation. Industrial products are consequently becoming more differentiated, including mono- and di-rhamnolipid-rich grades, acid-rich and lactonic-rich sophorolipids, application-specific agricultural grades, highly purified cosmetic grades and MEL-based wetting products. Evonik inaugurated industrial-scale rhamnolipid manufacturing in Slovakia, Holiferm has commercialized sophorolipid production in the UK, while Toyobo is expanding MEL applications beyond cosmetics into agricultural adjuvants. These developments are gradually improving supply security and allowing customers to evaluate biosurfactants on performance and formulation economics rather than sustainability attributes alone.

Market Dynamics

Drivers

Demand is supported by the transition toward renewable and readily biodegradable surfactant systems, particularly in cosmetics, personal care, household cleaning, agricultural formulations and specialty industrial applications. Glycolipid biosurfactants can deliver wetting, emulsification, detergency and dispersion at relatively low use levels while offering formulation characteristics that differ from conventional petrochemical surfactants. Growing industrial fermentation capacity is also reducing historical supply constraints. Product development by Evonik, Syensqo, Locus FS and other suppliers demonstrates that glycolipids are increasingly being designed as functional formulation ingredients rather than solely as environmental substitutes for conventional surfactants.

Restraints

Commercial expansion remains constrained by production economics, fermentation consistency and downstream purification requirements. Feedstock composition, microbial productivity, foaming during fermentation and separation efficiency can

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materially affect cost and product consistency. Different end markets also require substantially different purity, color, odor, active-content and microbial specifications, making one universal production grade difficult to apply across all applications. In addition, regulatory requirements are comparatively demanding in food, pharmaceutical and high-end personal-care applications, lengthening qualification cycles and favoring suppliers with stable quality-control and purification capabilities.

Opportunities

The strongest opportunities are emerging where glycolipid biosurfactants provide functional advantages in addition to renewable sourcing. In personal and home care, mildness, emulsification, wetting and compatibility with concentrated formulations support premium applications. In agriculture, biosurfactants can serve as wetting, spreading and adhesion-enhancing components for crop-protection and biological-control formulations. Petroleum and environmental applications provide opportunities in oil mobilization, equipment cleaning and contaminated-soil treatment, while MELs offer additional potential in agricultural adjuvants and other specialty formulations. Product tailoring by molecular composition and HLB should further broaden addressable applications.

Challenges

The industry faces a continuing need to close the cost and scale gap with established synthetic and oleochemical surfactants. Capacity announcements alone do not guarantee stable commercial output, and fermentation scale-up requires control of biological variability, contamination, foam formation and downstream recovery. Producers must also balance high purity with economic yield: extensive purification raises selling prices, whereas lower-cost fermentation concentrates may not meet cosmetic, pharmaceutical or other sensitive-use specifications. Competition will therefore increasingly depend on fermentation productivity, downstream-process efficiency, formulation support and the ability to provide consistent application-specific grades.

Industry Chain Analysis

The upstream industry primarily consists of renewable carbon sources such as sugars and vegetable oils, fermentation nutrients, production strains, process aids and

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fermentation equipment. Midstream manufacturing covers strain cultivation, aerobic fermentation, fermentation control, separation, concentration, purification, decolorization, drying and formulation, with downstream processing representing an important determinant of active content, purity and final cost. The downstream market includes agricultural inputs, oilfield chemicals, environmental remediation formulations, food-related formulations, cosmetics, personal and household care, pharmaceuticals and specialty industrial chemicals. Value creation is increasingly shifting from production of crude fermentation products toward controlled molecular profiles, standardized active content, higher purity and customer-specific formulation performance.

Segment Insights

Rhamnolipid and Sophorolipid constitute the core commercial segments of the market. Rhamnolipids combine strong surface activity, foaming, detergency and wetting properties and are increasingly positioned for cleaning, personal care, agriculture, oilfield and environmental applications. Commercial products now range from industrial concentrates to high-purity mono- or di-rhamnolipid-dominant grades. Sophorolipids have a comparatively mature history in detergents and personal-care formulations and can be adjusted between acid-rich and lactonic-rich compositions to deliver different solubility, foaming and emulsification characteristics. MELs remain smaller in commercial volume but represent an important specialty segment because of their wetting, moisturizing and interfacial properties; Toyobo's commercialization for agricultural adjuvants illustrates the expansion of MELs beyond their established specialty uses.

Downstream Market Opportunities

Cosmetics and daily chemicals are becoming important value-added outlets because customers increasingly require ingredients combining mildness, biodegradability and differentiated cleansing or emulsification performance. Agriculture offers another scalable opportunity as biosurfactants can improve wetting, spreading and adhesion and can be incorporated into pesticide, fertilizer and microbial biocontrol formulations. Petroleum and environmental protection applications are more performance- and cost-sensitive but provide substantial potential where interfacial-tension reduction, oil mobilization and remediation functions justify use. Pharmaceutical and food applications offer higher-value possibilities but generally require tighter purity, safety and regulatory control.

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Regional Insights

Europe has become an important center for large-scale industrialization, supported by Evonik's rhamnolipid facility in Slovakia, Holiferm's sophorolipid manufacturing platform in the UK and Syensqo's commercial sophorolipid portfolio. North America maintains a diversified supplier base spanning fermentation specialists and surfactant companies, including Jeneil Biotech, AGAE Technologies, Stepan, Locus FS and GlycoSurf. Asia-Pacific combines established Japanese commercialization with a growing Chinese manufacturing base; Toyobo and SARAYA Co., Ltd. participate in MEL and sophorolipid development respectively, while Chinese suppliers are expanding rhamnolipid and sophorolipid production for agriculture, daily chemicals, petroleum and environmental applications.

Competitive Landscape Analysis

Competition is evolving from small-volume specialty supply toward a combination of industrial fermentation scale, product-grade differentiation and application development. Evonik has established a prominent position in industrial-scale rhamnolipids and also markets sophorolipid products, while Holiferm focuses on fermentation-based sophorolipids and is developing broader glycolipid platforms. Jeneil Biotech and AGAE Technologies have long-standing rhamnolipid capabilities, and Stepan is developing rhamnolipid technology around the NatSurFact platform. Syensqo emphasizes sophorolipid ingredients for personal care, while Allied Carbon Solutions and SARAYA Co., Ltd. have established sophorolipid technologies and applications. Locus FS offers glycolipid-based performance ingredients, GlycoSurf focuses on high-purity and specialty glycolipid structures, Toyobo Corporation commercializes MEL technology, and TensioGreen supplies rhamnolipids and other biosurfactants. Shaanxi Deguan Biotechnology, Xi'an Rege Biotechnology, Shandong Aikang Biotechnology, Zhejiang SILVER-ELEPHANT BIO-ENGINEERING and Shandong Qilu Biotechnology Group form an increasingly relevant Chinese supply base across rhamnolipid and sophorolipid products. Competitive differentiation is increasingly determined by fermentation yield, downstream purification, active-content consistency, molecular-profile control, application formulation capability and cost at commercial scale.

Report Scope

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

This report is a detailed and comprehensive analysis of the world market for Glycolipids 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 competition, as well as details the characteristics of Glycolipids Biosurfactant that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Glycolipids Biosurfactant market based on the following parameters - company overview, production, value, price, gross margin,

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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.

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

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Glycolipids Biosurfactant Market, Segmentation by Type:

Rhamnolipid

Sophorolipid

Mannosylerythritol Lipids

Others

Global Glycolipids Biosurfactant Market, Segmentation by Product Form:

Powder

Liquid

Global Glycolipids 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 Glycolipids Biosurfactant Market, Segmentation by Application:

Agricultural

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Petroleum Industry

Environmental Protection

Food Industry

Cosmetics and Daily Chemicals

Pharmaceutical

Others

Companies Profiled:

Evonik

Jeneil Biotech

AGAE Technologies

Allied Carbon Solutions

Holiferm

Syensqo

Stepan

Locus FS

GlycoSurf

SARAYA Co., Ltd.

Toyobo Corporation

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TensioGreen

Shaanxi Deguan Biotechnology

Xi'an Rege Biotechnology

Shandong Aikang Biotechnology

Zhejiang SILVER-ELEPHANT BIO-ENGINEERING

Shandong Qilu Biotechnology Group

Key Questions Answered

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

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