

Global Mannosylerythritol Lipids (MELs) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Mannosylerythritol Lipids (MELs) market size is expected to reach \$ 116 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

Mannosylerythritol lipids (MELs) are a class of glycolipid biosurfactants produced through the fermentation of specific yeasts or fungi. Their molecular structure typically consists of a hydrophilic mannosylerythritol head group and hydrophobic fatty acid chains. They exhibit properties such as wetting, spreading, emulsifying, moisturizing, mildness, skin compatibility, self-assembly, and biodegradability. They are primarily used in high-end cosmetics, personal care products, agricultural adjuvants, research reagents, coatings for hygiene products, and specialty cleaning formulations. In 2025, global sales volume is approximately 240 metric tons, with an average unit price of around \$300 per kilogram and a global capacity utilization rate of approximately 46.5%. Upstream industry players include companies specializing in yeast strain development, fermentation engineering, vegetable oil and fatty acid raw materials, carbohydrate sources, agricultural and food industry by-product processing, fermentation tanks, separation and purification equipment, solvents and additives, and third-party testing agencies. Downstream players include cosmetic raw material suppliers, skincare brands, personal care formulators, pesticide adjuvant companies, green detergent manufacturers, hygiene product material suppliers, pharmaceutical delivery R&D institutions, research reagent suppliers, and contract formulation developers. The industry's average gross profit margin is approximately 48.0%. Regarding the cost structure, fermentation substrates and oil/fat carbon sources account for about 18%, strain maintenance and fermentation media for about 10%, and fermentation energy consumption and equipment operation for about 14%. ...%; downstream separation and purification account for approximately 20%; solvent recovery and environmental

treatment for 8%; R&D, testing, and regulatory documentation for 9%; labor and factory management for 7%; packaging, warehousing, and cold-chain logistics for 5%; equipment depreciation and maintenance for 6%; and other expenses for 3%. The demand profile encompasses high-end skincare active ingredients, mild emulsifiers, natural moisturizing agents, pesticide wetting and spreading agents, low-irritation cleansing formulas, biodegradable surfactants, functional coatings for hygiene materials, samples for scientific analysis, and materials for drug delivery research. Downstream customers include cosmetic raw material suppliers, skincare brands, pesticide formulation companies, green cleaning brands, pharmaceutical R&D institutions, university laboratories, scientific reagent companies, hygiene product manufacturers, and contract research and manufacturing organizations (CDMOs). Business opportunities are driven by policies favoring green chemistry, biomanufacturing, biodegradable surfactants, pesticide reduction and efficiency enhancement, and compliance trends regarding natural cosmetic ingredients; by technological innovations such as high-yield strain screening, low-cost fermentation using waste substrates, continuous fermentation, energy-efficient separation and purification, targeted production of MEL-A and MEL-B, formula stabilization, and refined application validation systems; and by shifting consumer preferences?specifically, a move away from traditional surfactants toward bio-based ingredients that are naturally derived, low-irritation, biodegradable, skin- and eco-friendly, and backed by narratives of high-end efficacy.

Mannosylerythritol lipids (MELs) represent a niche segment within the biosurfactant industry characterized by high technical barriers, limited commercial scale, yet strong growth potential. With global sales volume estimated at approximately 240 tons in 2025, demand is concentrated in high-end cosmetics, personal care, agricultural adjuvants, research reagents, and specialized cleaning formulations. Although MELs are significantly more expensive than traditional petrochemical surfactants?making immediate entry into the mass-market detergent and low-cost cleaning product sectors difficult?their mildness, moisturizing properties, skin compatibility, biodegradability, wetting/spreading capabilities, and self-assembly characteristics offer distinct advantages in low-dosage, high-value-added applications. Over the next two to five years, industry growth will hinge on improvements in fermentation yields, reductions in downstream purification costs, progress in customer validation within the cosmetics and agricultural adjuvant sectors, and the ability to utilize waste-based substrates. On the supply side, the market is currently dominated by a handful of Japanese and European companies alongside R&D-focused firms; the number of genuine global commercial producers remains limited, and the industry chain has not yet evolved into a landscape of mass-market competition. Driven by trends such as green chemistry,

biomanufacturing, pesticide reduction, natural skincare, and sustainable cleaning, MELs are poised to transition from the research and high-end sampling markets toward the market for formulation-grade ingredients. Overall, while the industry is unlikely to see rapid volume expansion in the short term, it holds significant potential for value appreciation in high-end cosmetics, agricultural adjuvants, and green materials. Future competition will shift from the mere capability to produce MELs to the ability to ensure stable, low-cost production, provide necessary regulatory documentation, achieve application validation, and co-develop mature formulations with downstream customers.

This report studies the global Mannosylerythritol Lipids (MELs) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Mannosylerythritol Lipids (MELs) 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 Mannosylerythritol Lipids (MELs) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Mannosylerythritol Lipids (MELs) total production and demand, 2021-2032, (Tons)

Global Mannosylerythritol Lipids (MELs) total production value, 2021-2032, (USD Million)

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

Global Mannosylerythritol Lipids (MELs) consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Mannosylerythritol Lipids (MELs) domestic production, consumption, key domestic manufacturers and share

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

Global Mannosylerythritol Lipids (MELs) production by Composition, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

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

This report profiles key players in the global Mannosylerythritol Lipids (MELs) 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 Toyobo Corporation (JP), Shanghai Qianyida Biotechnology Co., Ltd. (CN), 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 Mannosylerythritol Lipids (MELs) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (USD/Kg) by manufacturer, by Composition, 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 Mannosylerythritol Lipids (MELs) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Mannosylerythritol Lipids (MELs) Market, Segmentation by Composition:

Composition 50%

Composition 95%

Global Mannosylerythritol Lipids (MELs) Market, Segmentation by Acetylation Pattern:

Type MEL-A

Type MEL-B

Type MEL-C

Type MEL-D

Global Mannosylerythritol Lipids (MELs) Market, Segmentation by Fatty Acid Chain Length:

Short-Chain Acyl Type

Medium-Chain Acyl Type

Mono-Acyl Type

Di-Acyl Type

Tri- Or Poly-Acyl Type

Global Mannosylerythritol Lipids (MELs) Market, Segmentation by Application:

Medical

Personal Care & Household Products

Food

Agriculture

Ecological Restoration

Other

Companies Profiled:

Toyobo Corporation (JP)

Shanghai Qianyida Biotechnology Co., Ltd. (CN)

Key Questions Answered:

1. How big is the global Mannosylerythritol Lipids (MELs) market?
2. What is the demand of the global Mannosylerythritol Lipids (MELs) market?
3. What is the year over year growth of the global Mannosylerythritol Lipids (MELs) market?
4. What is the production and production value of the global Mannosylerythritol Lipids (MELs) market?
5. Who are the key producers in the global Mannosylerythritol Lipids (MELs) market?
6. What are the growth factors driving the market demand?

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