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

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Abstracts

The global Rhamnolipid Biosurfactant market size is expected to reach $ 58.25 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

Rhamnolipid biosurfactants are a prominent class of glycolipid metabolites produced through the fermentation of specific microorganisms, most notably Pseudomonas aeruginosa. Morphologically, their molecular structure comprises one or two hydrophilic rhamnose moieties covalently linked via glycosidic bonds to one or two hydrophobic ?-hydroxy fatty acid chains. Positioned as one of the most commercially mature and widely adopted biosurfactants globally, rhamnolipids exhibit exceptional surface activity, emulsification capabilities, and low critical micelle concentration (CMC), coupled with outstanding biodegradability, low eco-toxicity, and high tolerance to extreme temperatures and salinity. Driven by global carbon neutrality mandates and ESG investment trends, rhamnolipids are rapidly gaining traction as high-performance, bio-based alternatives to conventional petroleum-derived surfactants, penetrating high-growth sectors including premium personal care, eco-friendly detergents, environmental bioremediation, sustainable agriculture, and microbial enhanced oil recovery (MEOR).

Key Findings

Global rhamnolipid biosurfactant production reached 8,538 tons in 2025

Average selling price reached US$4,574 per ton in 2025

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Liquid and powder are the two principal commercial product forms

Agriculture petroleum environmental protection and daily chemicals constitute major commercial application groups

Industrial-scale fermentation is accelerating the transition from specialty supply toward broader-volume applications

Market Trends

The rhamnolipid industry is moving from small-batch specialty production toward industrial fermentation, standardized grades and application-specific formulations. Fermentation productivity, foam control, downstream separation and purification remain central technology variables because production economics are determined not only by fermentation yield but also by concentration, decolorization and purification costs. Industrial producers are increasingly using renewable sugars or vegetable-based feedstocks, while process development is moving toward safer production strains and more scalable fermentation platforms. Product development is also becoming more differentiated: industrial liquid concentrates address agriculture, oilfield and environmental applications, while decolorized, high-purity and mono- or di-rhamnolipid-enriched products support personal care, cosmetics, pharmaceutical development and other specification-sensitive uses. Evonik’s industrial-scale facility and AGAE Technologies’ scale-up activity illustrate the ongoing transition from niche supply toward commercial-volume biosurfactants.

Market Dynamics

Drivers

Demand is driven by the substitution of conventional surfactants with biodegradable and bio-based alternatives, combined with greater emphasis on environmentally compatible formulations in home care, personal care, agriculture and industrial applications. Rhamnolipids provide wetting, emulsification, detergency and foaming functionality and can maintain performance in demanding formulation environments. Industrial-scale manufacturing has also improved supply reliability and enabled large consumer and industrial customers to evaluate rhamnolipids as functional ingredients rather than laboratory-scale specialty chemicals.

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Restraints

Production cost remains the principal structural restraint. Fermentation requires control of microbial productivity and excessive foam generation, while downstream recovery, purification, concentration and drying can account for a significant portion of processing complexity. Product economics also vary substantially by purity and form, meaning that high-purity powders and composition-controlled grades cannot directly compete on price with conventional bulk surfactants in many cost-sensitive applications. Qualification requirements in food, pharmaceutical and high-end personal care applications further lengthen commercialization cycles.

Opportunities

The largest incremental opportunities are emerging from applications where biodegradability, low environmental persistence and high interfacial activity create measurable performance value. Agricultural adjuvants, biological crop-input formulations, petroleum recovery and cleaning, contaminated soil and water remediation, household cleaning and personal care represent important expansion directions. Higher-purity rhamnolipids also create opportunities in specialty formulations where mono-/di-rhamnolipid ratios, congener composition and color can be controlled to meet customer-specific requirements. Commercial product portfolios already demonstrate diversification from bulk liquids to purified solids and tailored molecular compositions.

Challenges

The industry must simultaneously improve fermentation yield, consistency and downstream economics while maintaining stable active content and composition between production batches. Feedstock cost, strain performance, foam management and purification efficiency directly affect competitiveness. Another challenge is market segmentation: industrial users prioritize cost and dosage efficiency, whereas cosmetics, pharmaceuticals and food-related applications demand tighter impurity, safety and formulation standards. Producers therefore need differentiated manufacturing and quality-control systems rather than a single universal product specification.

Industry Chain Analysis

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The upstream chain includes renewable carbon sources such as sugars and vegetable-derived feedstocks, fermentation nutrients, microbial strains, fermentation equipment, membrane and separation systems and formulation auxiliaries. Midstream operations comprise strain cultivation, fermentation, cell or impurity removal, extraction or separation, concentration, decolorization, purification, drying and formulation. Liquid products can reduce drying requirements and are well suited to direct industrial formulation, while powder and purified solid grades provide higher active content, transport efficiency and more precise dosing. Downstream value is created through formulation in agricultural inputs, oilfield chemicals, remediation agents, cleaning products, cosmetics, food-related formulations and pharmaceutical or research products.

Segment Insights

By physical form, liquid rhamnolipid is the core volume-oriented format because fermentation-derived concentrates can be incorporated directly into many industrial formulations and avoid part of the drying cost. Powder and solid products serve applications that require higher active content, storage stability, transportation efficiency or accurate dosing. Commercial suppliers increasingly offer both formats, confirming that physical form is primarily determined by downstream formulation requirements rather than by a single universal specification.

A second important segmentation dimension is purity and molecular composition. Industrial mixed-rhamnolipid grades coexist with higher-purity mono-rhamnolipid-dominant, di-rhamnolipid-dominant and selected-congener products. As downstream markets mature, this transition from undifferentiated fermentation products to application-specific grades will increase the value contribution of purification, analytical control and formulation technology.

Downstream Market Opportunities

Agriculture offers opportunities in wetting, spreading, emulsification and formulation enhancement for crop-input products, while petroleum and environmental applications utilize interfacial activity for oil mobilization, cleaning and contaminant removal. Cosmetics and daily chemicals are becoming strategically important because rhamnolipids combine detergency, foaming and mildness with a strong sustainability profile. Pharmaceutical and food-related applications remain more specification-intensive and are expected to favor purified or tightly controlled grades rather than low-purity industrial concentrates.

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Regional Insights

Europe has strengthened its position in large-scale industrial production following the commercialization of Evonik’s Slovakian fermentation facility, creating a stronger supply base for cleaning, personal care and other applications. North America maintains a diversified supplier structure represented by established fermentation specialists and specialty biosurfactant companies, with product portfolios covering agriculture, personal care and industrial uses. Asia is increasingly important as a manufacturing region, supported by new full-scale production activity and an expanding Chinese supplier base. China has developed commercial liquid, powder, agricultural and high-purity rhamnolipid grades, supporting broader penetration into industrial and consumer applications.

Competitive Landscape Analysis

Competition is increasingly defined by industrial fermentation scale, production cost, purification capability and application development. Evonik has established a leading position in industrial-scale commercialization through its dedicated fermentation facility and REWOFERM portfolio. AGAE Technologies competes through a broad range of liquid, solid, decolorized and composition-controlled rhamnolipid products and has expanded industrial production, while Stepan has strengthened its position through the NatSurFact rhamnolipid platform. Jeneil Biotech maintains a commercial biosurfactant portfolio, and GlycoSurf focuses more heavily on high-purity specialty rhamnolipid structures. TensioGreen combines rhamnolipid production with industrial and enhanced-oil-recovery application expertise. Shaanxi Deguan Biotechnology, Xi'an Rege Biotechnology, Zhejiang SILVER-ELEPHANT BIO-ENGINEERING and Shandong Qilu Biotechnology Group form part of the Chinese supply base, where competition increasingly centers on fermentation economics, liquid-versus-powder product flexibility, purification capability and penetration into agriculture, daily chemicals and industrial applications.

Report Scope

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

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This report is a detailed and comprehensive analysis of the world market for Rhamnolipid 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 Rhamnolipid Biosurfactant that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Rhamnolipid 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,

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Stepan, GlycoSurf, TensioGreen, Shaanxi Deguan Biotechnology, Xi'an Rege Biotechnology, Zhejiang SILVER-ELEPHANT BIO-ENGINEERING, Shandong Qilu Biotechnology Group, 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 Rhamnolipid 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 Rhamnolipid Biosurfactant Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Rhamnolipid Biosurfactant Market, Segmentation by Type:

Powder

Liquid

Global Rhamnolipid 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 Rhamnolipid Biosurfactant Market, Segmentation by Chemical Structure:

Mono-rhamnolipids

Di-rhamnolipids

Global Rhamnolipid Biosurfactant Market, Segmentation by Application:

Agricultural

Petroleum Industry

Environmental Protection

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Food Industry

Cosmetics and Daily Chemicals

Pharmaceutical

Others

Companies Profiled:

Evonik

Jeneil Biotech

AGAE Technologies

Stepan

GlycoSurf

TensioGreen

Shaanxi Deguan Biotechnology

Xi'an Rege Biotechnology

Zhejiang SILVER-ELEPHANT BIO-ENGINEERING

Shandong Qilu Biotechnology Group

Key Questions Answered

1. How big is the global Rhamnolipid Biosurfactant market?
2. What is the demand of the global Rhamnolipid Biosurfactant market?
3. What is the year over year growth of the global Rhamnolipid Biosurfactant market?

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4. What is the total value of the global Rhamnolipid Biosurfactant market?
5. Who are the Major Players in the global Rhamnolipid Biosurfactant market?
6. What are the growth factors driving the market demand?

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