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# Global Biosurfactants Market Growth 2026-2032

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## Abstracts

The global Biosurfactants market size is predicted to grow from US$ 152 million in 2025 to US$ 226 million in 2032; it is expected to grow at a CAGR of 6.0% from 2026 to 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 care

Industrial fermentation scale-up is expanding biosurfactants from specialty ingredients

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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.

### Restraints

Production economics remain the principal constraint. Fermentation requires tight control of microorganisms, feedstocks, aeration, foam and process conditions, while

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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

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

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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 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

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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

LP Information, Inc. (LPI) ' newest research report, the “Biosurfactants Industry Forecast” looks at past sales and reviews total world Biosurfactants sales in 2025, providing a comprehensive analysis by region and market sector of projected Biosurfactants sales for 2026 through 2032. With Biosurfactants sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Biosurfactants industry.

This Insight Report provides a comprehensive analysis of the global Biosurfactants landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report

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also analyzes the strategies of leading global companies with a focus on Biosurfactants portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Biosurfactants market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Biosurfactants and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Biosurfactants.

This report presents a comprehensive overview, market shares, and growth opportunities of Biosurfactants market by product type, application, key manufacturers and key regions and countries.

## Market Segmentation

### Segmentation by Type:

Rhamnolipid

Sophorolipid

Lipopeptides

Mannosylerythritol Lipid (MEL)

Others

### Segmentation by Product Type:

Powder

Liquid

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## Segmentation by Active Ingredient Content:

Active Ingredient Content <50%

Active Ingredient Content 50%-80%

Active Ingredient Content 80%-99%

Active Ingredient Content >99%

## Segmentation by Application:

Agriculture

Oil Industry

Environmental Protection

Food Industry

Cosmetics and Daily Chemicals

Pharmaceuticals

Others

## This report also splits the market by region:

Americas

United States

Canada

Mexico

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- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

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The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Evonik

Jeneil Biotech

AGAE Technologies

Allied Carbon Solutions

Holiferm

Syensqo

Stepan

Locus FS

GlycoSurf

SARAYA Co., Ltd.

Toyobo Corporation

TensioGreen

Kaneka Corporation

Shaanxi Deguan Biotechnology

Daqing Huali Biotechnology

Xi'an Rege Biotechnology

Shandong Aikang Biotechnology

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Zhejiang SILVER-ELEPHANT BIO-ENGINEERING

Bloomage Biotechnology Corporation Limited

Shandong Qilu Biotechnology Group

## Key Questions Addressed in this Report

What is the 10-year outlook for the global Biosurfactants market?

What factors are driving Biosurfactants market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Biosurfactants market opportunities vary by end market size?

How does Biosurfactants break out by Type, by Application?

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