

# Biosurfactants Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

<https://marketpublishers.com/r/B8D5E266F433EN.html>

Date: August 2025

Pages: 97

Price: US\$ 3,200.00 (Single User License)

ID: B8D5E266F433EN

## Abstracts

### Biosurfactants Market Summary

The global Biosurfactants market is an emerging but strategically significant sector within the specialty chemicals and sustainable materials industries. Biosurfactants are surface-active agents derived from the fermentation of renewable natural feedstocks, such as sugars, oils, and agricultural by-products. Unlike synthetic surfactants derived from petrochemicals, biosurfactants offer biodegradability, lower toxicity, and higher environmental compatibility, positioning them as vital components in the transition to greener chemical solutions. By 2025, the global biosurfactants market is estimated to reach USD 30–60 million, with robust expansion anticipated at a compound annual growth rate (CAGR) of 8–16% through 2030. This strong growth trajectory reflects a convergence of factors, including rising consumer demand for sustainable products, regulatory emphasis on reducing petrochemical reliance, and advancements in biotechnology that enable cost-competitive large-scale production.

### Industry Characteristics

The biosurfactants industry is characterized by several distinctive attributes:

**Sustainability-Driven Growth:** Unlike many chemical segments, biosurfactants benefit directly from global sustainability mandates, green chemistry initiatives, and consumer preferences for eco-friendly products.

**Biotechnology-Based Production:** Industrial biosurfactant production requires microbial fermentation, downstream purification, and technological expertise,

creating high barriers to entry and protecting early movers.

**Niche Yet Rapidly Scaling:** Although relatively small in absolute market value, biosurfactants represent one of the fastest-growing subsegments in specialty chemicals due to their alignment with global environmental trends.

**Innovation-Intensive:** Development of fermentation techniques, strain engineering, and continuous production processes are critical to improving yields, reducing costs, and expanding application scope.

**Industrialization Milestone:** The year 2024 marked the transition of rhamnolipids and sophorolipids into industrial-scale production, led by key players such as Evonik and AGAE Technologies, signaling a turning point from laboratory-scale development to commercialization.

## Market Segmentation by Application

### Personal Care

The personal care segment is a leading driver of biosurfactant demand, supported by consumer preferences for natural and biodegradable ingredients in skincare, haircare, and cosmetics. Rhamnolipids and sophorolipids are especially valued for their mildness, moisturizing effect, and biodegradability, making them ideal for sensitive formulations. This segment is projected to grow at 10–16% annually through 2030, with premium cosmetic formulations in Asia-Pacific and Europe leading adoption.

### Home Care

In home care products such as detergents, dishwashing liquids, and surface cleaners, biosurfactants provide strong cleaning performance with lower environmental impact compared to synthetic surfactants. Adoption is driven by green consumerism and regulatory restrictions on phosphates and petrochemical surfactants. This segment is expected to grow at 9–14% annually, with high adoption potential in Europe and North America where eco-labeling and regulatory compliance are strong market forces.

### Food Industry

Biosurfactants are applied as emulsifiers, stabilizers, and anti-adhesive agents in food processing. Sophorolipids, in particular, are recognized for their GRAS (Generally Recognized as Safe) status, enabling use in bakery, dairy, and beverage formulations. The food sector is anticipated to expand at 8–13% annually, although growth is somewhat limited by stringent food safety regulations and the need for consistent large-scale supply.

### Pharmaceuticals

The pharmaceutical industry leverages biosurfactants for drug delivery systems, antimicrobial properties, and biocompatibility. Lipopeptides such as surfactin are being studied and commercialized for their role in antimicrobial therapy and as excipients in drug formulations. The pharmaceutical application segment is forecast to grow at 9–15% annually, driven by both research momentum and the gradual commercialization of biosurfactant-based formulations.

### Others

Other uses include agriculture (as bio-pesticides and soil remediation agents), oilfield chemicals, and environmental remediation. While currently niche, these applications highlight the versatility of biosurfactants. Growth in this segment is estimated at 7–12% annually, contingent on further industrial adoption and regulatory support.

## Market Segmentation by Type

### Glycolipids Biosurfactant

This category includes rhamnolipids and sophorolipids, currently the most widely commercialized biosurfactants. Glycolipids exhibit strong emulsification, foaming, and surface activity, making them suitable for personal care, home care, and food applications. Rhamnolipids are gaining traction due to advances in continuous fermentation and large-scale purification, with 2024 marking the year of industrial-scale production. Sophorolipids are favored for their mildness and biodegradability, positioning them well in cosmetics and green cleaning products. This type is expected

to grow at 10–16% annually, making it the largest and fastest-growing category.

### Lipopeptides Biosurfactant

Derived from microorganisms such as *Bacillus subtilis*, lipopeptides (e.g., surfactin) consist of fatty acid chains linked to peptide structures. They possess potent antimicrobial activity, high stability, and strong surface activity, making them promising in pharmaceuticals, biomedicine, and agricultural applications. Current production volumes are smaller, but technological advances may accelerate adoption. Growth is expected at 8–14% annually.

### Phospholipids Biosurfactant

Phospholipids, composed of hydrophobic fatty acid ester groups and hydrophilic phosphate groups, offer excellent emulsification, moisturizing, and compatibility with biological systems. Widely used in cosmetics, pharmaceuticals, and food formulations, phospholipids represent a stable segment projected to expand at 7–12% annually, with adoption closely tied to personal care and drug delivery markets.

## Regional Market Trends

### Asia-Pacific

Asia-Pacific is emerging as the fastest-growing market, with projected growth of 10–16% annually through 2030. The region benefits from expanding personal care, food processing, and green cleaning industries, as well as large-scale investments in biosurfactant production. China is developing strong domestic capabilities, with companies such as Zhejiang Silver-Elephant Bio-engineering and Shengda Zijin Biotech scaling up fermentation-based production. Japan and South Korea are also significant markets for cosmetics and specialty formulations.

### Europe

Europe remains a leading region for biosurfactant adoption, projected to grow at 9–14% annually. Strict environmental regulations, coupled with consumer demand for natural

and eco-certified products, drive adoption across personal care and home care applications. Germany, France, and the Nordic countries lead in green consumerism, with companies such as Evonik spearheading industrial-scale rhamnolipid production.

### North America

North America is forecast to grow at 8–13% annually, supported by demand in home care, pharmaceuticals, and food applications. The U.S. plays a central role, with AGAE Technologies establishing a large-scale rhamnolipid production facility and multinational companies adopting biosurfactants in green formulations. Regulatory frameworks promoting sustainable alternatives further support growth.

### Other Regions

Latin America and the Middle East are smaller markets but hold long-term potential in agriculture and home care applications. Growth in these regions is anticipated at 6–10% annually, depending on infrastructure development and regulatory alignment.

## Key Market Players

### Evonik

Evonik, a German specialty chemicals giant, achieved a milestone in January 2024 by producing the first product from the world's first industrial-scale rhamnolipid plant in Slovakia. This plant positions Evonik as a leader in sustainable biosurfactants and demonstrates its commitment to decarbonizing the specialty chemicals industry.

### KANEKA

KANEKA Corporation, based in Japan, has established itself as a major innovator in biotechnology and specialty materials. Its biosurfactant development leverages advanced fermentation technologies, targeting applications in cosmetics and food formulations.

### Allied Carbon Solutions

Headquartered in Japan, Allied Carbon Solutions focuses on the production of sophorolipids and other glycolipid biosurfactants, catering to cosmetics, personal care, and eco-friendly detergents. Its expertise in fermentation scale-up has enabled it to serve global markets.

### Dispersa

Dispersa, a Canadian biotechnology company, develops rhamnolipids and other biosurfactants using waste feedstocks. Its sustainability-focused approach positions it as a niche innovator in the North American market.

### Sasol

Sasol, a South African-based multinational, is diversifying its surfactant portfolio by investing in biosurfactants. Its global footprint and downstream integration into detergents and chemicals give it strategic advantages in scaling adoption.

### Indorama Ventures

Indorama Ventures, a global chemical producer headquartered in Thailand, has shown interest in biobased surfactants as part of its broader sustainability initiatives. Its extensive global presence provides a pathway for introducing biosurfactants to new markets.

### AGAE Technologies

Based in the U.S., AGAE Technologies is a pioneer in rhamnolipid production. In 2025, the company, along with its partners, launched Asia's largest retrofitted biosurfactant manufacturing plant, with capacity exceeding 1,000 metric tons annually. This facility highlights AGAE's commitment to industrializing biosurfactants at scale.

### Zhejiang Silver-Elephant Bio-engineering Co. Ltd.

Zhejiang Silver-Elephant is one of China's leading biosurfactant producers, with a production capacity of approximately 1,000 tons annually. The company plays a crucial role in supplying rhamnolipids domestically and internationally.

Shaanxi Deguan Biotechnology Co. Ltd.

Shaanxi Deguan specializes in biobased surfactants and fermentation-based chemicals. It is expanding production capabilities to capture growing demand in personal care and green cleaning markets.

Bloomage Biotechnology Corporation

Bloomage Biotechnology, well known for hyaluronic acid and biobased personal care ingredients, is also expanding into biosurfactants. Its strong brand recognition in cosmetics positions it as a key supplier for natural beauty formulations.

## **Porter's Five Forces Analysis**

Supplier Power: Moderate

Suppliers of biosurfactant feedstocks (sugars, oils) are abundant, but suppliers of industrial-scale fermentation technology remain limited. This creates moderate supplier power, especially for high-purity grades.

Buyer Power: High

Large consumer goods companies and cosmetics manufacturers have strong bargaining power due to scale and established supplier relationships. Buyers demand both cost-competitiveness and consistent quality, pressuring suppliers.

Threat of New Entrants: Moderate to Low

While sustainability trends attract new entrants, the need for advanced fermentation technology, purification expertise, and capital-intensive facilities creates high barriers.

Intellectual property in rhamnolipid and sophorolipid production further restricts entry.

Threat of Substitutes: Moderate

Petrochemical surfactants remain cheaper and widely available. However, increasing regulatory restrictions and consumer preference for natural alternatives limit substitution risks over the long term.

Competitive Rivalry: Moderate to High

The market is still niche, with relatively few large-scale players. However, competition is intensifying as global chemical companies enter the space and regional biotechnology firms scale up. Differentiation is based on technology, cost efficiency, purity, and application specialization.

## **Opportunities and Challenges**

### **Opportunities**

**Green Consumerism:** Rising demand for sustainable personal and home care products presents strong growth potential.

**Industrial Scale-Up:** Breakthroughs in fermentation yield and downstream purification will reduce costs and enable larger-scale adoption.

**Pharmaceutical Potential:** Lipopeptides and phospholipids hold untapped opportunities in biomedicine and drug delivery.

**Regional Expansion:** Emerging markets in Asia-Pacific offer vast opportunities as domestic companies scale production and consumer demand rises.

**Strategic Collaborations:** Partnerships between biotechnology startups and global chemical giants can accelerate industrialization and commercialization.

### **Challenges**

**High Production Costs:** Biosurfactants remain more expensive than petrochemical counterparts, limiting adoption in cost-sensitive applications.

**Regulatory Barriers:** Stringent approvals for food and pharmaceutical applications slow down commercialization.

**Scale Limitations:** Despite recent industrialization, production volumes remain small compared to synthetic surfactants.

**Market Volatility:** Dependence on feedstock supply chains introduces risks in cost and availability.

**Competitive Pressure from Alternatives:** Biobased synthetic surfactants and advanced green chemicals may compete with biosurfactants for similar applications.

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