

Emulsifiers Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Source (Bio-Based Emulsifiers and Synthetic Emulsifiers), By Application (Food Emulsifiers, Cosmetics & Personal Care, Oilfield Chemical, Pharmaceutical, and Agrochemical), By Region & Competition, 2021-2031F

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Abstracts

The Global Emulsifiers Market is projected to expand from USD 9.32 Billion in 2025 to USD 13.62 Billion by 2031, reflecting a Compound Annual Growth Rate (CAGR) of 6.53%. Emulsifiers function as amphiphilic compounds that stabilize blends of immiscible liquids, such as oil and water, by lowering surface tension and inhibiting phase separation. Growth is primarily fuelled by the rising demand for processed and convenience foods, where these additives are crucial for improving texture, consistency, and shelf-life stability. Additionally, the pharmaceutical and personal care industries are increasingly utilizing high-performance emulsifiers to enhance the delivery and bioavailability of active ingredients in diverse formulations.

A major obstacle hindering market progress is the instability of raw material costs and the growing imperative to establish sustainable supply chains, especially for derivatives based on palm oil. Producers face complex regulatory frameworks and consumer expectations for environmentally responsible sourcing, often requiring expensive certification procedures. Data from the Roundtable on Sustainable Palm Oil indicates that estimated global production of certified sustainable palm oil reached 13.4 million tonnes in 2024. This shift toward certified feedstocks results in supply limitations and price premiums, potentially restricting market access and profitability for manufacturers of standard emulsifiers.

Market Driver

The rising consumption of processed and convenience foods acts as a primary catalyst for the global emulsifiers market, as these additives are essential for preserving texture, aeration, and shelf stability in industrial bakery and confectionery items. With consumers prioritizing ready-to-eat meals and packaged snacks, manufacturers depend on advanced stabilizing agents to guarantee product consistency throughout extensive supply chains. This reliance on functional ingredients in large-scale food processing continues to drive significant economic value and resilience against market fluctuations. Highlighting this trend, Tate & Lyle reported in their 'Full Year Results 2024' (May 2024) that the Food & Beverage Solutions division achieved an 8% rise in adjusted EBITDA, demonstrating the enduring profitability and demand supporting processed food formulations.

Alongside volume growth, a shift in consumer preference toward clean-label and natural ingredients is transforming product development and sourcing strategies. This trend forces suppliers to innovate by substituting synthetic emulsifiers with plant-based or natural texturizing systems that provide similar functionality without impacting the "clean" status of the final product. Consequently, ingredients facilitating transparent labeling are outselling traditional alternatives. For instance, Ingredion Incorporated's '2023 Annual Report' (February 2024) noted a 4% increase in net sales for specialty ingredients, driven largely by health-conscious demand for texturizers. Reflecting industrial confidence in this direction, Palsgaard completed a major facility expansion in the Netherlands in 2024, aiming to double its production capacity for PGPR, a vital emulsifier in chocolate and confectionery.

Market Challenge

The unpredictability of raw material costs combined with increasing pressure to ensure sustainable supply chains creates a significant hurdle for the Global Emulsifiers Market. Manufacturers depend heavily on plant-based derivatives, especially palm oil, which face erratic price changes due to irregular weather patterns and geopolitical developments. This instability disrupts financial planning and reduces profit margins, resulting in a challenging environment for producers who must absorb sudden cost increases while striving to keep prices competitive.

Adding to this economic uncertainty is the strict demand for environmentally certified ingredients, compelling companies to manage costly compliance requirements. Meeting

rigorous sustainability standards necessitates substantial investment in traceability systems and audits, which further increases operational costs. According to the Roundtable on Sustainable Palm Oil, global consumption of certified sustainable palm oil hit 10.1 million tonnes in 2024. This high demand for compliant feedstocks fosters a fiercely competitive procurement landscape, causing supply bottlenecks and higher premiums that directly limit market accessibility and profitability for standard emulsifier manufacturers.

Market Trends

The Global Emulsifiers Market is experiencing a distinct move toward PEG-free and cold-process emulsifiers in personal care, motivated by the need to cut manufacturing energy costs and remove impurities linked to ethoxylated chemistries. Formulators are increasingly utilizing bio-based, non-ionic surfactants that enable ambient temperature processing, thereby significantly reducing the carbon footprint of cosmetic production while meeting regulatory standards regarding 1,4-dioxane. This technical shift is quickly generating commercial success for ingredients with these sustainability attributes. For example, Croda International Plc stated in its 'Annual Report 2023' (February 2024) that sales of its ECO surfactants range grew by over 20% year-on-year, confirming strong industry support for these innovative, low-energy systems.

Concurrently, there is growing demand for multifunctional and high-performance blends as manufacturers aim to enhance production efficiency and safeguard margins against raw material volatility. Rather than depending on commoditized single ingredients, the industry is shifting toward value-added systems that offer improved texture, stability, and aeration at lower usage rates, effectively separating profitability from simple volume growth. This strategic emphasis on high-value, specialized functionality enables suppliers to sustain strong earnings even during softer market demand. As evidence, AAK reported in its 'Annual Report 2023' (April 2024) a 43% rise in operating profit, achieved primarily by refining its portfolio toward specialized, high-value plant-based solutions despite a simultaneous drop in overall sales volumes.

Key Market Players

DOW Corning

Royal DSM

BASF SE

Kerry Group

Clariant

Solvay S.A.

Archer Daniels Midland

Akzonobel N.V.

Cargill

Evonik Industries AG

Report Scope

In this report, the Global Emulsifiers Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Emulsifiers Market, By Source

Bio-Based Emulsifiers

Synthetic Emulsifiers

Emulsifiers Market, By Application

Food Emulsifiers

Cosmetics & Personal Care

Oilfield Chemical

Pharmaceutical

Agrochemical

Emulsifiers Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Emulsifiers Market.

Available Customizations:

Global Emulsifiers Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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