Global Bio-Based Surfactants Market: Information by Form (Anionic, Cationic, Non-Ionic and Amphoteric), Product Type (Rhamnolipids, Methyl Glucoside Esters, Alkyl Polyglucosides (APG), Sucrose Esters, Anionic APG Derivatives, Methyl Ester Sulphonates (MES) and others), Application (Household Detergents, Industrial & Institutional Cleaners, Cosmetics & Personal Care, Textile, Oilfield Chemicals, Agriculture Chemicals, Food Processing and others) and Region (North America, Europe, Asia-Pacific, Latin America and the Middle East & Africa) - Forecast till 2025

Market Overview

The Global Bio-Based Surfactants Market is expected to register a CAGR of over 5% to reach around USD 18 billion by the end of 2025.

Bio-based surfactants are surface-active substances produced either from oil and fats by producing oleochemicals or from sugar such as molasses by fermentation. These surfactants are usually produced as low volume and high-value products, particularly for high-end customer product. These surfactants are less toxic and highly biodegradable. They enhance the emulsification of hydrocarbons and solubilize hydrocarbon contaminants. These surfactants act as emulsifiers, dispersants, degreasers, solubilizing agents, stabilizers, foaming agents, anti-microbial agents, and anti-adhesive agents. Based on form, bio-based surfactants has been categorized as nonionic surfactants, anionic surfactants, cationic surfactants, and amphoteric surfactants. Among these, nonionic surfactants are being widely used in numerous applications as they do not ionize when dissolved in water or aqueous solution. Some of the commonly used bio-based surfactants include rhamnolipids, alkyl polyglucoside, methyl glucoside esters, and anionic APG derivatives among others.

Bio-based surfactants are being used in a wide range of applications including household detergents, personal care, agricultural chemicals, oilfield chemicals, industrial and institutional cleaning, and others. Household detergents segment accounted for the largest market share in 2018 and is expected to register significant growth during the review period owing to increasing use in fabric softeners, dishwashing liquids, and laundry detergents, among others.

The growth of the global bio-based surfactants is primarily driven by increasing environmental regulations imposed by the governments across the globe against the use of chemicals in the detergents due to their adverse impact on the environment when disposed into water. Growing consumer awareness about environmental hazards is likely to result in increased consumption of bio-based surfactants over conventional surfactants.

Bio-based surfactants are being widely used in the cosmetics and personal care industry as emollients and thickening and cleansing agents as they help improve the viscosity of lotions and creams. The growing cosmetics and personal care industry with increasing demand for color cosmetics, UV resistant skin care products, and anti-aging cosmetics is likely to propel the market growth worldwide.

Growing preference for bio-based products in applications including oilfield, agriculture, and processing is likely to create lucrative opportunities for the players operating in the global bio-based surfactants markets.
One of the emerging trends noticed in the global bio-based surfactants includes the development of bio-based surfactants by the players operating in the surfactants market. For instance, in 2018, Croda International PLC developed 100% bio-based surfactants for various applications including detergents, agriculture, and cosmetics & personal care, among others.

Global Bio-Based Surfactants Market Share, by Application, 2018 (%)

![Global Bio-Based Surfactants Market Share, by Application, 2018 (%)](image)

Source: MRFR Analysis

Regional Analysis

The market in Asia-Pacific accounted for the largest share of the global bio-based surfactants market in 2018 and is expected to witness significant growth during the review period. The growing industrial base in the developing countries is the prime factor driving the demand for industrial and institutional cleaners and thus, bio-based surfactants. Growing preference for liquid detergents in the developing countries of Asia-Pacific is expected to offer lucrative opportunities to the players operating in the Asia-Pacific bio-based surfactants market.

Europe is projected to be the prominent market for bio-based surfactants on account of the increasing regulations on the use of chemicals in the manufacturing of detergents. For instance, the International Association for Soaps, Bio-Based Surfactants, and Maintenance Products established by the European Commission has set limitations regarding the extent to which phosphates and other phosphorus compounds can be used in laundry detergents and automatic dishwasher detergents.

The market in North America is expected to witness significant growth during the review period. The presence of well-established oil and gas industry in the region is likely to fuel the demand for bio-based surfactants in oilfield application.

The Latin American market is expected to exhibit considerable growth concerning the rapidly expanding industrialization, particularly in Mexico and Brazil. The Middle East & Africa is likely to witness moderate growth during the review period on account of growing end-use industries such as surfactants, cosmetics & personal care, and agriculture.

Segmentation

The global bio-based surfactants market has been segmented based on form, product type, application, and region.

Based on form, the global market has been segregated into anionic, cationic, non-ionic, and amphoteric.

Based on product type, the global market has been divided into rhamnolipids, methyl glucoside esters, alkyl polyglucosides (APG), sucrose esters, anionic APG derivatives, methyl ester sulfonates (MES), and others.

Based on application, the global market has been categorized as household detergents, industrial & institutional cleaners, cosmetics & personal care, textile, oilfield chemicals, agriculture chemicals, food processing, and others.

The global market, by region, has been classified as North America, Europe, Asia-Pacific, Latin America, and the Middle East & Africa.
Key Players

Some of the key players operating in the global bio-based surfactants market are BASF SE (Germany), Air Products and Chemicals, Inc (US), Stepan Company (US), Clariant (Switzerland), Croda International PLC (UK), Kao Corporation (Japan), Sasol (South Africa), Galaxy Surfactants Ltd (India), Akzo Nobel NV (Netherlands), Solvay (Belgium), Sirius International BV (Netherlands), and Enaspol AS (Czech Republic).

Intended Audience

- Bio-based surfactants manufacturers
- Traders and distributors of bio-based surfactants
- Research and development institutes
- Potential investors
- Raw material suppliers
- Nationalized laboratories

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