Ceresana

Market Research Since 2002

FOB:CHEM 2026 · OPENING KEYNOTE

From biochemical innovation to market advantage

The decisions that turn technical potential into a viable commercial strategy

12 November 2026



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MARKET SIGNAL 01

A large surfactant market does not equal an accessible one

TOTAL SURFACTANTS

> $49bn

Global annual revenue; study base year 2023

BIO-BASED SURFACTANTS

> $32bn

Global revenue forecast for 2034

> **The strategic question is not “How large is the category?”
> but “Which part can this specific formulation reach?”**

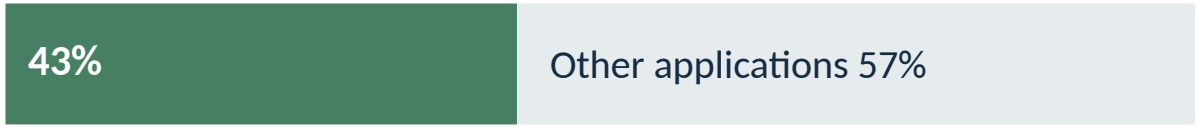
Sources: Ceresana Surfactants – World (2025); Biobased Surfactants – World (2025). Different years; no share implied.

Application structure—not the bio-based label—drives demand

43%

of bio-based surfactant revenues come from household detergents and cleaning agents

SHARE OF GLOBAL REVENUE — CURRENT MARKET MIX



THE BUYING LOGIC DIFFERS

Home care	Cost-in-use · safety · qualification
Personal care	Formulation feel · purity · claim support
Industrial uses	Performance · process fit · supply reliability

Source: Ceresana Biobased Surfactants – World (2025), base year 2024. Shares are rounded.

Bio-based solvents underline the importance of market context

$9.3bn

Global bio-solvent revenue forecast

2034

+4.2%

Forecast global revenue growth

per year to 2034

€2.2bn+

European bio-solvent revenue forecast

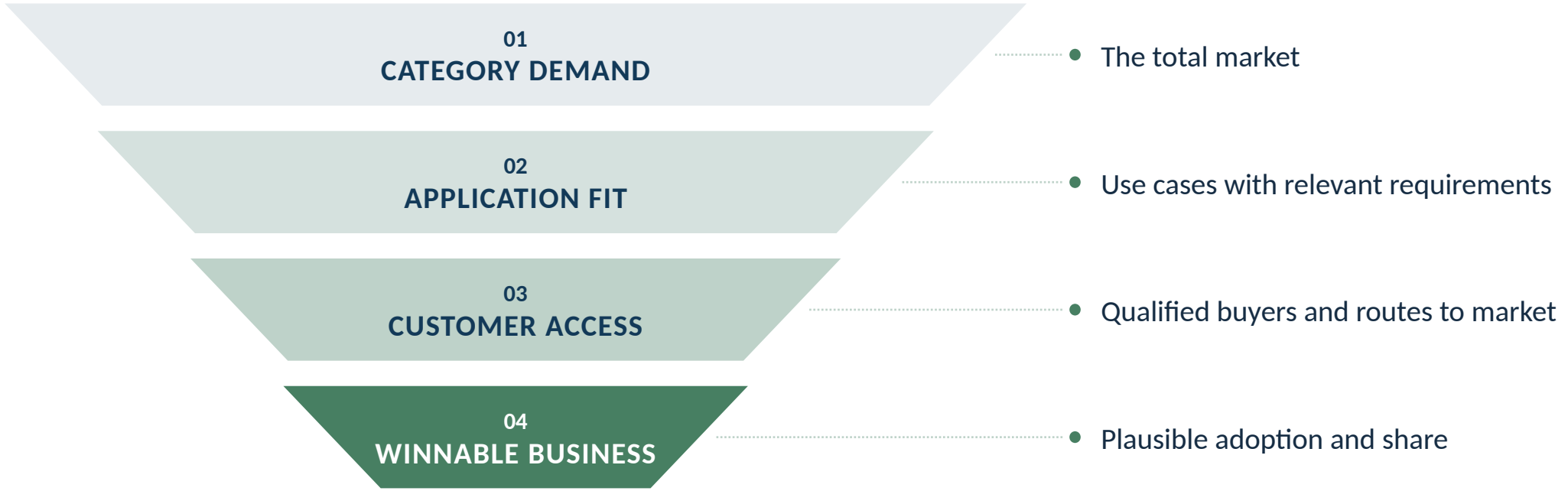
2034

The market may grow — but selection still depends on solvent-specific requirements:

- Solvency & drying
- VOC / safety constraints
- Substitutes & economics
- Qualification & supply

Sources: Ceresana Biobased Solvents – World (2025) / Europe (2026). EUR and USD figures are not converted.

The investable market gets narrower at every decision gate



The gap between category size and obtainable revenue is where commercial risk accumulates.

Conceptual decision funnel; stages illustrate market qualification, not measured market proportions.

Three management choices depend on different evidence

DECISION	EVIDENCE NEEDED	DECISION ENABLED
WHERE TO ENTER	Application size, demand by country, competitors, accessibility	**Prioritise initial markets**
HOW TO COMPETE	Substitutes, customer value-in-use, pricing, qualification hurdles	**Set proposition & price**
WHEN TO SCALE	Adoption timing, demand scenarios, supply limits and downside risk	**Stage investment & capacity**

Different strategic questions require different data — and sometimes different research designs.

Ceresana decision framework; examples of research questions, not client outcome claims.

Ceresana connects chemical ingredients to downstream demand

Since 2002

10,000+ customers

INGREDIENTS	Surfactants · Solvents · Additives
FORMULATIONS	Coatings · Adhesives · Cleaners
MARKETS	Manufacturers · Applications · Regions

Source: Ceresana company profile, portfolio of bioeconomy and chemicals market studies.

Ceresana turns dispersed information into testable assumptions

01 → **02** → **03** → **04**

TRIANGULATE

Industry data, company reports, value-chain sources

MODEL

Market size, segments, forecasts, scenarios

VALIDATE

Cross-checks, economics, alternative assumptions

DECIDE

Priorities, sensitivities and action options

Not a claim of certainty: a transparent basis for management to challenge assumptions.

Methodological sources: Ceresana – About Us / Methodology; Custom Studies & Market Intelligence.

Published market studies establish a consistent strategic baseline

RELEVANT REPORT FAMILIES	COVERAGE
Biobased surfactants	**World | Europe**
Biobased solvents	**World | Europe**
Biobased paints & coatings	**World | Europe**
Biobased adhesives	**World | Europe**

Demand & revenues • applications & countries • company profiles • forecasts • Excel data

Source: Ceresana Market Studies catalogue (October 2026); scope varies by publication.

Custom research tests the hypotheses behind a specific decision

ILLUSTRATIVE MANAGEMENT BRIEF

Which European applications should a new bio-based solvent target first?

01 · FRAME

Technical fit, available supply and substitution case

02 · VALIDATE

Customer requirements, addressable demand and competitor offers

03 · PRIORITISE

Price/uptake scenarios, country ranking and launch options

Output: a decision-ready market model, assumptions, scenarios and entry priorities.

Hypothetical research example; deliverables and methods are agreed project by project.

The advantage comes from learning before a commitment is fixed

01

R&D direction

What functionality is valued?

02

Customer focus

Who can qualify and adopt it?

03

Commercial model

What price, volume and margin are credible?

04

Scale-up decision

Which risks remain in each scenario?

The earlier a critical assumption is tested, the more strategic options remain open.

Illustrative decision sequence; timing and information needs vary by company.

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A QUESTION TO TAKE WITH YOU

Which market assumption must be right for your next decision to succeed?

Market evidence should answer that question before resources are committed.

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