Market Study: Biobased Surfactants

Europe Report (1st Edition)

Ceresana
Market Research Since 2002

This brochure provides further information on the study:
"Biobased Surfactants – Europe (1st Edition)"

Executive Summary

Green chemistry is becoming more and more important for the chemical industry: The packaging of cosmetics and cleaning products increasingly promises ingredients that are "100% organic, vegan, biodegradable, and renewable". Glycolipids, for example, can be obtained from corn sugar or rapeseed oil. Ceresana has now analyzed the European bio-based surfactants market for the first time. Surfactants are among the first everyday chemical products that are already being produced in large quantities from renewable raw materials. Ceresana's market researchers expect these "green" chemicals to generate sales of more than EUR 10.1 billion in Europe by 2034.

Clean Surfactants for Clean Water

Natural surfactants may be more compatible with aquatic life and human skin than conventional fossil-based products. Surfactants or surface-active agents can facilitate the removal of dirt, form foam, and enable the mixing of water and oil. Because of this, they are the main ingredient in washing powder and liquid detergents. Household laundry detergents and natural cleaning products are by far the most important sales market for biosurfactants in Europe today, accounting for around 46% of total revenues. This is followed by personal care products and cosmetics as well as industrial cleaning agents. However, the versatile chemicals are also used for a wide variety of other applications, for example as emulsifiers in skin creams, as dispersing agents in paints and printing inks, as antistatic additives in plastics and textile fibers or as wetting agents in fertilizers and pesticides. There are surfactants in toothpaste as well as in cooling lubricants, extinguishing foam, disinfectants, and contraceptives. Industrial applications include ore extraction and the bioremediation of oil fields.

Bio-Economy with Biomass

All surfactants have a water-repellent and a water-attracting part, both of which can be bio-based. Sugar surfactants can consist of coconut fatty alcohols and glucose, for example. The most important sugar surfactants at present are the high-foaming alkyl polyglycosides (APGs): non-ionic surfactants that can be produced purely on a plant basis. APGs are less sensitive to water hardness than anionic surfactants, effective at lower temperatures, skin-friendly, non-toxic, and biodegradable. With these environmentally friendly properties, APGs could become an alternative to linear alkylbenzene sulfates (LAS), the most widely used petrochemical surfactants today. Glycolipids, such as sophorolipids and rhamnolipids, are also promising biochemicals.

The European Biosurfactants Market Report:

Chapter 1 of the new study by Ceresana provides a comprehensive analysis of the European biosurfactants market, including forecasts up to 2034. The market report shows the development of demand (in tonnes) and revenues (in USD and EUR), which are then broken down into 6 application areas. Demand is also analyzed for 4 product types.

In **Chapter 2**, the surfactant sales for 18 European countries are analyzed individually. Demand and revenues are examined as well and broken down in the same way as in chapter 1.

Chapter 3 provides detailed company profiles of the 30 largest bio-based surfactant manufacturers, including Arkema, BASF, Clariant, Croda, Evonik, Givaudan, Nouryon, and Syensqo.

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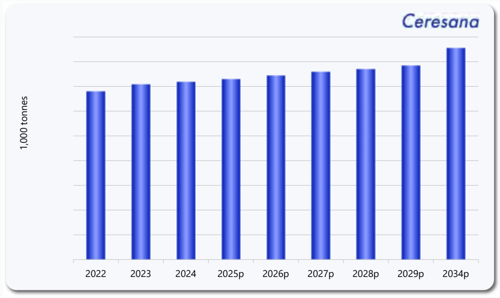
In 2024, the demand for biobased surfactants in Italy amounted to approx. X tonnes. We expect an average growth rate of X% p.a. for the next 10 years. The market volume will therefore likely amount to approx. X tonnes in 2034.

Revenues generated with biobased surfactants in Italy amounted to approx. EUR X billion in 2024. We forecast a turnover value of EUR X billion for 2034.



Graph: Demand in Italy from 2022 to 2034

Revenues	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
Million USD	X	X	X	X	X	X	X	X	X	X% p.a.
Million EUR	X	X	X	X	X	X	X	X	X	X% p.a.

Table: Revenues generated in Italy from 2022 to 2034, in million USD and million EUR

Million EUR	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
Detergents & Cleaners	X	X	X	X	X	X	X	X	X	X% p.a.
Industrial Cleaners	X	X	X	X	X	X	X	X	X	X% p.a.
Personal Care & Cosmetics	X	X	X	X	X	X	X	X	X	X% p.a.
Textiles & Leather	X	X	X	X	X	X	X	X	X	X% p.a.
Paints & Plastics	X	X	X	X	X	X	X	X	X	X% p.a.
Other Applications	X	X	X	X	X	X	X	X	X	X% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Table: Revenues generated in Italy from 2022 to 2034 – split by application

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
Detergents & Cleaners	X	X	X	X	X	X	X	X	X	X% p.a.
Industrial Cleaners	X	X	X	X	X	X	X	X	X	X% p.a.
Personal Care & Cosmetics	X	X	X	X	X	X	X	X	X	X% p.a.
Textiles & Leather	X	X	X	X	X	X	X	X	X	X% p.a.
Paints & Plastics	X	X	X	X	X	X	X	X	X	X% p.a.
Other Applications	X	X	X	X	X	X	X	X	X	X% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Table: Demand in Italy from 2022 to 2034 – split by application

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2034p	2024-2034
Anionic	X	X	X	X	X	X	X	X	X	X% p.a.
Cationic	X	X	X	X	X	X	X	X	X	X% p.a.
Non-Ionic	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X% p.a.
Total	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X% p.a.**

Table: Demand in Italy from 2022 to 2034 – split by product

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3 Company Profiles*

Sasol Germany GmbH

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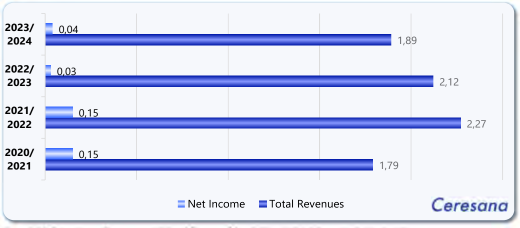
Financial Key Data (in Billion EUR)



*Financial information refers to consolidated figures of Sasol Chemical Holdings GmbH & Co KG

General Information about the Company

Divisions, Product Range	The product portfolio includes chemicals for the following applications: • Laundry detergents and cleaning products • Paints and coatings • Cosmetic products • Pharmaceutical products • Automotive industry • Construction industry • Industrial applications
Production Sites	The company's two production sites are located in: • Brunsbüttel, Germany • Marl, Germany
Profile Summary	**General information:** Sasol was founded in 1950 and is a global chemicals and energy company. Sasol Germany GmbH was founded in 2001, when Sasol Limited, South Africa, entered Germany's chemicals sector via the acquisition of CONDEA (Sasol Chemie). Today, the company manufactures and markets surfactants, fatty alcohols, ethylene oxide, paraffin and synthetic Fischer-Tropsch waxes as well as emulsions and inorganic specialties such as high-purity and ultra-high purity alumina. The plant in Marl mainly produces high-quality surfactants and surfactant precursors while the plant in Brunsbüttel manufactures a broad spectrum of organic and inorganic products. Sasol Germany employs around 1,750 people. **Financial information:** The financial year ends in June. In financial 2024, the company held total assets of EUR 1.61 billion. The South African parent company, Sasol Limited, generated a consolidated turnover of ZAR 249 billion and a net income of ZAR 7.73 billion in 2024/25. **Current news:** In 2024, it was announced that Sasol Germany would close a production plant at its Marl site as part of its ongoing review and evaluation of its plant portfolio. In the same year, Sasol expanded the production capacities at the Brunsbüttel site. In 2025, Sasol announced the launch and commercialization of a new non-ionic surfactant derived from insect oils under the trade name LIVINEX IO 7. The product is currently available exclusively in European markets. **ISO certifications:** The company is certified according to ISO 9001, ISO 14001, and ISO 45001.

Specific Information about Biobased Surfactants

Sasol offers:

- Sophorolipids for home care under the brand LIVINEX SL made from palm-free, natural feedstocks
- Glycolipids for personal care applications under the brand CARINEX SL
- Alcohol ethoxylates based on insect oil, a by-product of a process to make proteins, under the brand name LIVINEX IO 7. The product is suitable for home care, fabric care, industrial and institutional cleaning.

*Note: The profiles are assigned to the country in which the company or holding is headquartered. Profiles also include JVs and subsidiaries.

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... anticipate risks and opportunities

... forecast supply and demand

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Please do not hesitate to contact us if you have any questions.

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Reliable Data and Facts for Your Knowledge Advantage:

- Revenues, demand, production, import, and export until 2034
- Macroeconomic and sector-specific explanations per country
- Segmentation into applications, technologies, and products
- 7 world regions and up to 40 countries
- Profiles from manufacturers with capacities

Click on Any Topic to Receive Further Details on Our Current Studies:

Bio-Economy

- Biobased Adhesives – Europe / – World
- Biobased Insulation Material – World
- Biobased Paints & Coatings – Eur. / – World
- Biobased Solvents – Europe / – World
- Biobased Surfactants – Europe / – World
- Bioplastic Packaging – World
- Bioplastic Films – World
- Bioplastics – World
- Polylactic Acid – World

Chemicals

- Carbon Black – World
- Fillers – Europe / – World
- Flame Retardants – World
- Pigments – World
- Plastic Additives – World
- Plasticizers – World
- Solvents – World
- Stabilizers – World
- Surfactants – World
- Titanium Dioxide – World

Packaging

- Bags, Sacks & Pouches – Europe / – World
- Corrugated Board & Solid Board – Europe
- Flexible Packaging – Europe
- Food Packaging – Europe
- Labels – Europe
- Plastic Caps & Closures – Europe / – World
- Plastic Films – Europe / – World

Industry

- Adhesives – Europe / – World
- Insulation Material – Europe / – World
- Paints & Coatings – Europe / – World
- Plastic Extrusion – Europe / – World
- Plastic Injection – Europe / – World
- Plastic Pipes – Europe / – World
- Plastic Windows – World
- Printing Inks – Europe / – World
- Windows & Doors – Europe

Plastics

- Composites (CFRP & GFRP) – World
- Engineering Plastics – World
- Expandable Polystyrene – World
- Masterbatches – World
- Plastics – Europe / – World
- Polyethylene (LDPE) – World
- Polyethylene (LLDPE) – World
- Polypropylene – World
- Polyvinyl Chloride – World
- Silicones – World
- Synthetic Rubber – World
- Thermoplastic Elastomers – World

Mobility

- Automotive Coatings – World
- Automotive Plastics – Europe / – World
- Hybrid & Electric Cars – Europe

To the Shop