

Market Study: Biobased Surfactants



World Report (2nd Edition)

This brochure provides further information on the study: “Biobased Surfactants – World (2nd Edition)”

Executive Summary

Cleaning with the help of bacteria, fungi, or algae: Detergents and shampoos do not necessarily have to be made from climate-damaging crude oil or controversial palm oil. Surfactants can also be fermented by microorganisms from organic waste, for example. The latest, already second edition of Ceresana's biobased surfactants market report forecasts that the global market for these green chemicals will experience sales growth to more than USD 32 billion by 2034. In North America, Ceresana's market researchers expect sales to increase by around 3%, and in other regions of the world by more than 6%. Surfactants are among the first everyday chemical products that are already being manufactured in large industrial plants from renewable raw materials, i.e. at least partly on the basis of biogenic materials such as sugar, corn, or vegetable oil.

Clean Bioeconomy

Washing powders and liquid detergents consist to a large extent of surfactants, as these surface-active substances make it easier to remove dirt. In addition, surfactants can form a foam and enable the mixture of water and oil. Household detergents and cleaners are by far the most important sales market for bio-based surfactants today, accounting for around 43% of global revenues. The versatile chemicals are used for a wide variety of 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.

Sustainable Upcycling of Biomass

Bio-based surfactants not only reduce dependence on fossil raw materials, but also open up new recycling opportunities for organic residues, such as by-products from the paper

industry and biofuel production or food waste from supermarkets. 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 are also considered a promising class of substances.

Current Global Market Report (2nd Edition):

Chapter 1 of the new study provides a comprehensive analysis of the global market – including forecasts up to 2034: The development of demand and revenues is explained for 7 world regions. Demand and revenues are also broken down by individual application areas. Furthermore, demand is recorded for 4 product types.

In **Chapter 2**, the surfactant sales for 26 countries are analyzed individually, i.e. for the largest national surfactant markets. The demand for and revenues generated with bio-based surfactants are shown in each case. In addition, demand is split by product types and demand and revenues are broken down for 6 applications.

Chapter 3 provides 55 company profiles of the most important bio-based surfactant manufacturers, such as Arkema, BASF, Evonik, Givaudan, Nouryon, Sasol, Dow, and Wilmar.

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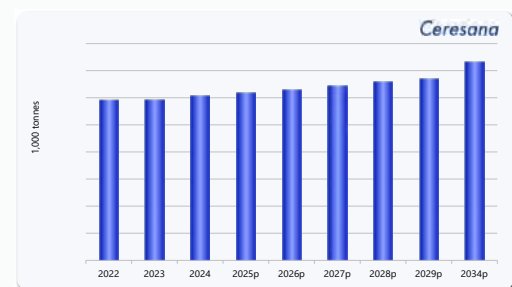
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French demand for biobased surfactants amounted to X tonnes in 2024. Demand volume is likely to increase to approx. X tonnes by the end of our forecasting period. Revenues generated with biobased surfactants amounted to roughly EUR X million in 2024. We expect growth of X% p.a. in this regard in the upcoming 10 years.



Graph: Demand in France from 2022 to 2034

Revenues	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2030p	2031p	2032p	2033p	2034p	2024-2034
Million USD	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Million EUR	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.

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

Million USD	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2030p	2031p	2032p	2033p	2034p	2024-2034
Detergents & Cleaners	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Industrial Cleaners	X	X	X	X	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	X	X	X	X% p.a.
Textiles & Leather	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Paints & Plastics	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Total	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.

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

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2030p	2031p	2032p	2033p	2034p	2024-2034
Detergents & Cleaners	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Industrial Cleaners	X	X	X	X	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	X	X	X	X% p.a.
Textiles & Leather	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Paints & Plastics	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Total	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.

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

in 1,000 tonnes	2022	2023	2024	2025p	2026p	2027p	2028p	2029p	2030p	2031p	2032p	2033p	2034p	2024-2034
Anionic	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Cationic	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Non-Ionic	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Others	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.
Total	X	X	X	X	X	X	X	X	X	X	X	X	X	X% p.a.

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

Market Study: “Biobased Surfactants – World (2nd Edition)”

26 Countries, 55 Producers, 300 Pages, 71 Graphs, 168 Tables, 12/2025

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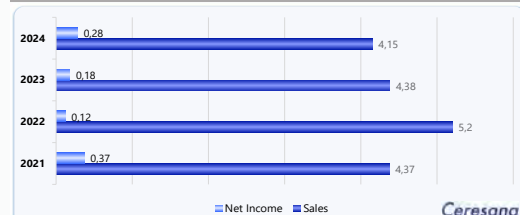
South Africa (1)

Clariant International Ltd.

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4132 Muttenz
Switzerland

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Web: www.clariant.com

Financial Key Data (in Billion CHF)



General Information about the Company

Divisions, Product Range

The company operates in the following three business divisions:

- Care Chemicals
- Catalysts
- Adsorbents & Additives

Production Sites

The company and its subsidiaries operate 68 production sites worldwide.

Profile Summary

General information:

Clariant International Ltd. was founded in 1995 as a spin-off of the chemical company Sandoz which was established in 1886 in Basel. As a company for specialty chemicals, Clariant offers numerous consumer solutions for many industries. In 2024, the company employed 10,465 people.

Financial information:

Clariant is listed on the SIX Swiss Exchange.

In 2024, total assets amounted to CHF 6.26 billion. Additionally, Clariant operates 11 research and development centers and invested about CHF 126 million into R&D.

Split by business segment, 54% of the company's revenues in 2024 were generated with Care Chemicals, 24.7% with Adsorbents & Additives, and 21.3% with Catalysts.

Split by region, 40.8% of the revenues in 2024 were generated in EMEA, 29.4% in Asia-Pacific, 17% in North America, and 12.8% in Latin America.

Since 2021, the company has been manufacturing bio-based ethoxylates and select derivatives through Clariant IGL Specialty Chemicals Pvt. Ltd. (JV with India Glycols Limited (IGL) – a 49% partner).

Current news:

In 2023, Clariant inaugurated a new production site for halogen-free flame retardants and a new catalyst plant in China. Moreover, the group divested its North American Land Oil as well as its Quats business and closed its bioethanol plant in Romania.

In 2024, the group acquired Canada-based Lucas Meyer Cosmetics.

ISO certifications:

Clariant is globally certified according to ISO 9001, ISO 14001, and ISO 45001. Furthermore, some sites are certified according to ISO 50001.

Specific Information about Biobased Surfactants

Clariant produces the VITA range – 100% biobased surfactants derived from plant-based feedstocks (e.g. sugarcane or corn ethanol). The range includes such brands as Genapol LA, a nonionic surfactant for home care applications, and Emulsogen HCO 020 SG Vita (PEG-20 Hydrogenated Castor Oil), a nonionic surfactant for personal care.

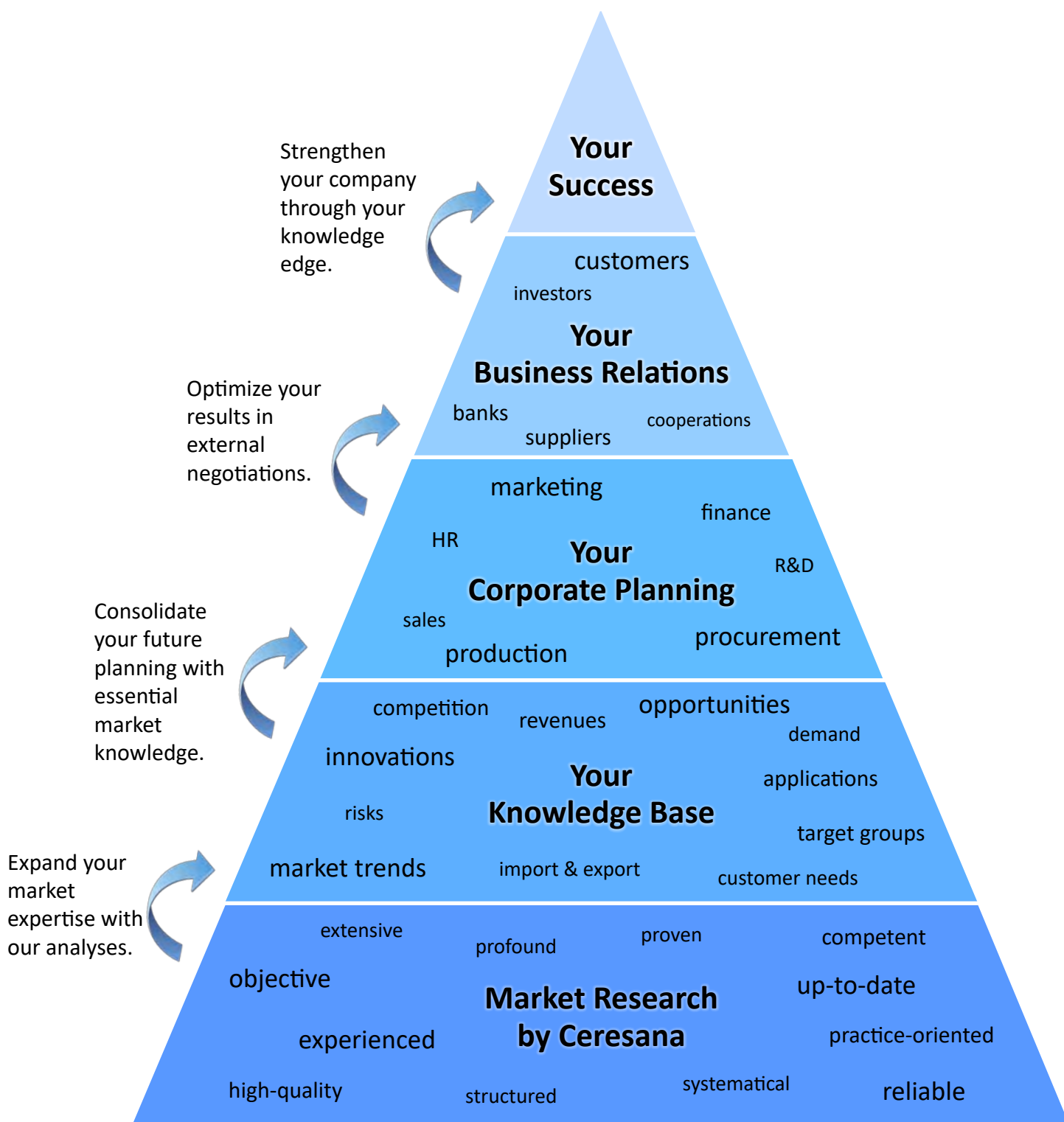
Further, the company offers a mild sugar surfactant derived from sunflower oil and sugar for personal care under the brand GlucoTain Sense.

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

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	<u>Biobased Adhesives – Europe / – World</u>	<u>Adhesives – Europe / – World</u>	Industry
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