

Alkyl Polyglycoside (APG) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Alkyl Polyglycoside Market size is estimated at 93.22 kilotons in 2024, and is expected to reach 109.70 kilotons by 2029, growing at a CAGR of 3.31% during the forecast period (2024-2029).

The COVID-19 pandemic harmed the alkyl polyglycoside sector. Global lockdowns and severe rules enforced by governments resulted in a catastrophic setback as most production hubs were shut down. Nonetheless, the business is recovering since 2021 and is expected to rise significantly in the coming years.

Key Highlights

- The major factors driving the market are a surge in demand for home care and personal care products and growing awareness of health hazards associated with conventional surfactants.
- Conversely, the availability of substitutes is expected to hinder the studied market's growth.
- A surge in the adoption of natural food ingredients is expected to act as an opportunity for the market studied.
- Europe represents the largest market and is expected to be the fastest-growing region over the forecast period. It is due to increased consumption from countries such as Germany, the United Kingdom, and France.

Alkyl Polyglycoside (APG) Market Trends

Home Care Products Application to Dominate the Market

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- Alkyl polyglycoside surfactants are widely known for their high biodegradability, eco-friendly nature, and easy hydrolyzed ability. Such favorable properties contribute to the growing demand for alkyl polyglycoside in several home care product applications.
- Population growth, urbanization, changing living standards, and rising per capita income significantly affect the demand for home care products, such as laundry detergents, soaps, and fabric conditioners.
- In developed regions, like Europe and North America, automated washing machines are widely prevalent and used for laundry operations. Household detergents hold a major share in the home care products applications of the alkyl polyglycoside market.
- Moreover, people are becoming more conscious about increasing the efficacy and efficiency of laundry operations, which, in turn, is surging the demand for home care products. As non-ionic surfactants, like alkyl polyglycoside surfactants, are the primary raw materials used in the production of detergents, the growing demand for laundry detergents worldwide is expected to boost the market growth.
- According to the International Trade Centre, Germany is the largest exporter of soap and organic surface-active products, witnessing a substantial increase in export value of around USD 14,542,764 thousand in 2022. This growth signifies a growing demand for these products in international markets, translating to increased demand for fatty acids as key components in producing surfactants. The United States of America exported USD 1,123,962 thousand, China USD 1,046,966 thousand, Indonesia USD 871,438 thousand, and France USD 750,356 thousand in 2022.
- The laundry detergent sector holds substantial consumer spending in the United States, reaching billions annually. Brand loyalty is a prominent feature among American consumers, with established brands like Tide enjoying a strong market presence as one of the largest-selling laundry detergent brands in the country. Moreover, the United States boasts an extensive manufacturing infrastructure, with approximately 2,356 soap, cleaning compounds, and toilet preparation manufacturing facilities.
- Hence, owing to the abovementioned factors, the demand for alkyl polyglycoside from home care products is expected to increase considerably over the forecast period.

Europe to Dominate the Market Studied

- The growth of the personal care and cosmetic industry, particularly in major European countries, coupled with consumer preferences toward using natural home care products, is driving the consumption of alkyl polyglycoside in Europe.
- Germany represents Europe's largest personal care and cosmetic market, followed by France and the United Kingdom. Due to their convenient location and wide selection of mass-market beauty brands, Drug stores are the largest distribution channel in Germany's beauty and personal care industry. Moreover, the significant growth of the manufacturing sector in the region is expected to aid the demand for the product.
- Growing consumer awareness of the importance of naturally derived products in home care applications will likely boost the market size. Several players are observed to continuously strive to manufacture product-derived renewable sources by decreasing the use of potentially harmful chemicals, such as parabens, phthalates, and aluminum salts.
- The industry is regulated by stringent regulations by regional authorities, such as REACH, CEFIC, and ECHA, regarding the environmental hazards of inorganic surfactants. The robust adoption of this bio-based surfactant considering the product's relatively low toxicity, further complies with the regulations of the regional enforcement authorities.
- France is a home for a large cosmetics and skincare market, with support from players like the L'Oreal Group, Procter & Gamble, Unilever PLC, Ralph Lauren Corporation, Revlon Inc., Christian Louboutin SA, and Carolina Herrera, among others. According to the French Federation for Beauty Companies (FEBEA), nearly 85% of total export sales in France is mainly driven by the perfume, skincare categories, and make-up in 2022, in which the perfumery segment depicted a growth of 30.2% in the same year.
- Furthermore, according to the Cosmetics 50 2022 ranking given by Brand Finance, French cosmetics brands were recognized among the most valued brands in the global cosmetics sector in 2022. L'Oreal emerged as the most valued French cosmetics brand, with a brand value of more than USD 11 billion. Guerlain and Lancome occupied the second and third place, with brand value standing at USD 6,130 million and USD 4,585 million, respectively.
- Due to the factors above, the demand for alkyl polyglycoside is expected to increase in the region during the forecast period.

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Alkyl Polyglycoside (APG) Industry Overview

The alkyl polyglycoside (APG) market is partially consolidated, with a few major players dominating a significant portion. Some major companies are BASF SE, Clariant, Croda International PLC, FENCHEM, and Dow.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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