

Surfactants Market Assessment, By Type [Anionic, Non-Ionic, Cationic, Amphoteric, Others], By Functionality [Surface Modification, Emulsification, Foaming, Dispersion, Others], By End-user [Pharmaceuticals, Cosmetics, Household & Industrial Cleaning, Textile, Elastomers & plastics, Food & Beverages, Agrochemicals, Oilfield, Paints & Coatings, Others], By Region, Opportunities and Forecast, 2016-2030F

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Report description:

Global surfactants market size was valued at USD 40.8 billion in 2022, which is expected to grow to USD 63.6 billion in 2030, with a CAGR of 5.7% during the forecast period between 2023 and 2030. The global surfactants market is experiencing significant growth driven by several key factors, expanding industrial and institutional sectors, including healthcare, hospitality, and manufacturing, and continued demand for effective surfactants for cleaning and sanitizing applications. Surfactants play a critical role in maintaining high levels of hygiene and cleanliness, driving the need for specialized formulations that meet specific industry requirements.

Additionally, the growth of end-use industries like personal care, home care, and agrochemicals is fueling the demand for surfactants. The rising global population, increasing disposable incomes, and enhanced living standards contribute to this surge in demand, particularly for premium products that incorporate high-quality surfactants. Moreover, the increasing awareness and demand for eco-friendly and sustainable products have propelled surfactant manufacturers to develop bio-based alternatives, addressing the rising consumer preference for environmentally responsible commodities. Lastly, the heightened focus on health and hygiene due to the COVID-19 pandemic has amplified the use of surfactants in disinfectants and cleaning agents, increasing market demand.

Strong Demand from the Textile Industry to Drive the Market

The textile industry significantly drives the surfactants market under its extensive reliance on these compounds throughout the manufacturing process. Surfactants are fundamental as wetting agents in the pre-treatment phase, facilitating optimal

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penetration of water and other chemicals into fibers. It is crucial for subsequent processes like dyeing and finishing, where surfactants act as emulsifying agents, ensuring even dispersion of dyes for uniform coloration. Additionally, surfactants are employed in scouring, aiding in removing impurities, oils, and waxes from fabrics.

For instance, The Global Textile Industry Survey (GTIS) conducted by the International Textile Manufacturers' Federation (ITMF) in the first half of July 2023 reveals a positive shift in business conditions within the global textile sector. Despite the challenging economic environment, a notable number of companies are showcasing resilience and adaptability, with an increasing percentage reporting favorable developments in their business situations. This upturn in the textile industry is expected to increase demand for surfactants in the global market.

Expansion of the Industrial Sector to Create Traction

The global expansion of industrial and institutional sectors like healthcare, hospitality, and manufacturing hinges on the essential need for efficient surfactants in cleaning and sanitizing applications. In healthcare, surfactant-based solutions are vital for disinfection and maintaining impeccable hygiene in facilities. Likewise, the hospitality industry relies on surfactants for maintaining cleanliness and a pleasant environment, which is crucial for guest satisfaction. Additionally, manufacturing industries utilize surfactants to upkeep machinery and ensure operational efficiency. The consistent demand for specialized and effective surfactants to meet industry-specific requirements amplifies their importance, firmly propelling the growth and advancement of the surfactants market on a global scale.

For instance, Bravo has secured commercial cleaning contracts with clients such as a local Coca-Cola bottling plant and the Children's Museum of Indianapolis. It continues to gain traction with consistent demand for specialized and effective surfactants to meet industry-specific requirements amplifies their importance, firmly propelling the growth and advancement of the surfactants market on a global scale.

Growing Demand for Surfactant from Personal Care and Cosmetic Sector

The personal care and cosmetics industry is witnessing remarkable growth, primarily driven by a consumer emphasis on grooming, skincare, and personal hygiene. Consumers increasingly recognize the importance of self-care and invest more in products that enhance their appearance, maintain skin health, and support overall personal hygiene. Surfactants are crucial to formulating personal care products, making them indispensable ingredients in industry. As the demand for personalized and specialized personal care products continues to escalate, the need for surfactants with specific functionalities and properties is expected to rise. For instance, according to India Retail and E-commerce Trends, Beauty and Personal care segment witnessed a 132% increase in order value during 2022, compared to the previous year. Hence, the level of growth in the cosmetic sector drives the surfactants demand globally.

Impact of COVID-19

The COVID-19 pandemic significantly impacted the surfactants market. It triggered a surge in demand for cleaning and disinfecting products, where surfactants play a critical role. Consumer behavior shifted towards hygiene-centric choices, emphasizing effective surfactants. However, the market faced disruptions due to supply chain challenges and operational constraints at manufacturing facilities. Amidst it, research accelerated to enhance surfactants' antiviral properties, for instance manufacturers focused on innovating surfactant-based products that are highly effective in eliminating viruses, including SARS-CoV-2, and a focus on sustainability that led to the development of eco-friendly surfactants. Despite market uncertainties, the pandemic had a lasting effect, shaping the surfactants market towards a more health-conscious and sustainable future.

Impact of Russia-Ukraine War

The surfactants market, particularly in the European region, has been adversely affected by the war, notably due to Europe's significant dependency on Russia for upstream oil and gas resources. The conflict has prompted various western nations to implement foreign policy directives and economic sanctions, particularly targeting the imports from Russia. This situation has introduced uncertainty in the procurement of essential upstream petrochemical feedstocks and a substantial surge in oil and gas prices, directly impacting the surfactants market since petrochemicals such as benzene, ethylene, n-paraffin, and kerosene which are the primary feedstocks of synthetic surfactants.

Key Players Landscape and Outlook

Major surfactant manufacturers are actively developing bio-based surfactants in response to the increasing consumer demand for environmentally sustainable products. This surge in demand for bio-based surfactants directly responds to the pressing need to

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reduce the ecological footprint associated with traditional chemical-based surfactants.

For instance, BASF introduced Plantopon Soy, an anionic biosurfactant derived from renewable resources and coconut oil specifically sourced as a protein derivative from non-GMO soybeans. Concurrently, Evonik launched REWOFERM RL 100, a biodegradable rhamnolipid biosurfactant with production slated at a facility in Slovakia as of March 2022.

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