

United States 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:

United States surfactants market size was valued at USD 6.9 billion in 2022, which is expected to grow to USD 10.3 billion in 2030, with a CAGR of 5.1% during the forecast period between 2023 and 2030. The surfactants market is propelled by several key drivers that collectively shape the growth trajectory. Firstly, the increasing demand for surfactants in the household and personal care sector is driven by the rising global population, evolving consumer lifestyle, and heightened hygiene awareness. Moreover, the industrial sector significantly fuels the demand for surfactants, particularly in applications such as agrochemicals, textiles, paints & coatings, and oil & gas. With the expanding industrial landscape, surfactants are continuously required for various applications, contributing to market growth.

The healthcare and pharmaceutical sectors drive the demand, as surfactants play a vital role in drug delivery, emulsification, and formulation. The constant growth and pharmaceutical advancements necessitate a higher demand for surfactants to formulate medicines and related products effectively. Additionally, advancements in technology and research have led to the development of novel surfactants with improved properties and eco-friendly profiles. The emphasis on sustainable solutions and environmentally friendly products has driven the demand for green and bio-based surfactants, aligning with the global shift toward sustainability.

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Growing Drilling Activity in the US to Drive Market Demand

The oil and gas industry in the United States relies significantly on surfactants for critical applications, particularly in Enhanced Oil Recovery (EOR), drilling fluids, and associated processes. The continuous advancements, expanding shale gas reserves, and exploration activities have heightened the demand for surfactants in this sector. Surfactants play a pivotal role in EOR by altering the surface tension and interfacial properties of reservoir rock and fluids, aiding in the displacement of trapped oil, enhancing recovery. Additionally, they are essential in drilling fluids, reducing friction, stabilizing formations, and improving lubrication during drilling.

For instance, according to Baker Hughes North America Rig Count, the number of rigs in the United States has increased 60% in 2022, compared to 2021. As the drilling activities in the US are likely to increase, as they meet Europe's gas demand, which raises the requirement for surfactants in the US.

Improving Pharmaceutical Manufacturing to Drive the Market

Surfactants play a pivotal role in the pharmaceutical industry, finding diverse drug formulation and delivery applications. Their versatile properties make them indispensable for drug solubilization, emulsification, and stabilization of pharmaceutical formulations. In drug delivery systems, surfactants aid in improving the bioavailability and efficacy of drugs by facilitating their dispersion and absorption. They are often utilized to enhance the solubility of drugs, enabling their effective delivery within the body. Moreover, surfactants are crucial components in emulsions, creams, and ointments, contributing to the stability and texture of these formulations.

For instance, pharmaceutical manufacturers in the US received capital investment of USD 10 billion to increase the manufacturing capacity within the country. This development in the US pharmaceuticals industry and increasing domestic production capacities will drive the demand for surfactants in the United States.

Strong Personal Care and Cosmetic Sector as Emerging Sector in the Market

Surfactants constitute fundamental components in an extensive array of personal care products, encompassing everyday essentials such as shampoos, soaps, skincare products, and detergents. Their multifunctional properties serve to enhance the efficacy and overall performance of these products. The increasing global population, evolving lifestyles, and heightened awareness of personal hygiene have collectively fueled a substantial surge in the demand for personal care products.

For instance, the fourth quarter of 2022 witnessed the strongest sales at USD 26.3 billion of personal care in the United States and sales trend has been steadily increasing, which drives the demand for surfactants in the country.

Impact of COVID-19

The United States surfactants market underwent significant impacts due to the COVID-19 pandemic. Surface surfactants played a pivotal role in a notable surge in the demand for cleaning and disinfecting products. Consumer preferences shifted towards hygiene-centric choices, underscoring the importance of effective surfactants. However, the market encountered disruptions due to challenges in the supply chain and operational limitations at manufacturing facilities and decreased demand from end-users such as Paints & Coatings, Textile, etc. During the pandemic, research efforts intensified to enhance surfactants' antiviral properties and manufacturers prioritized innovation in surfactant-based products, focusing on their efficacy in combating viruses, including SARS-CoV-2.

Impact of Russia-Ukraine War

The Russian-Ukraine war has several indirect effects on the United States surfactants market. As several European countries banned the imports of Russian oil and gas due to Moscow's invasion of Ukraine. The United States stepped in to meet the European countries and energy requirements, which increased the drilling activities in the country and witnessed a raised demand for surfactants. Furthermore, the ongoing war directly impacted the surfactants market as the primary feedstocks for synthetic surfactants, such as benzene, ethylene, n-paraffin, and kerosene prices were affected

Key Players Landscape and Outlook

Major surfactants manufacturers in the United States have strategically engaged in acquisitions to bolster their market standing and enhance their product portfolios. These acquisitions are a proactive approach to fortify their position in the competitive market landscape, enabling them to offer a broader spectrum of products and solutions.

For instance, in September 2022, Stepan Company made a significant acquisition by incorporating PerformanX Specialty Chemicals, LLC, a surfactant manufacturer, into its portfolio. This strategic acquisition is poised to enhance Stepan's share in the

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surfactants market, solidifying its position as a key player in the industry.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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