



Market Insights: Surfactants – 2024

Market Insights: Surfactants – 2024 is one in a series of reports published as part of NexantECA's Markets & Profitability program.

NexantECA's Market Insights report provides a comprehensive review of the global and regional markets for surfactants with historic data from 2018 and forecasts to 2035.

The following scope is covered:

- Overview of surfactants functionality and value chain
- Overview of the surfactants business, covering the main products
 - Nonionic (Ethoxylates, etc.)
 - Anionic (Sulphonates/Sulphates, etc.)
 - Cationic (Quats, etc.)
 - Amphoteric (Betaines, etc.)
- Development of bio surfactants
- Key end segments: Household detergents, Personal Care, I&I Cleaners, Agrochemicals, Textile, Leather and Paper, Lubes and Metal Working, Oil, Gas, and Mining, Construction, Paints and polymers and Other
- Global and regional market outlook covering each of the main products above, including overview, consumption by product type and end uses, producers by product type, trends and opportunities for regions: North America, South America, Europe, Middle East and Africa, China, and Other Asia Pacific
- Pricing analysis of synthetic and natural fatty alcohol ethoxylates
- Delivered cost competitiveness analysis of synthetic and natural fatty alcohol ethoxylates

Report Abstract:

Surfactants, short for surface-active agents, refer to substances which lower the surface tension between two phases, which may be liquid-liquid, gas-liquid or liquid-solid. The unique molecular feature that enables surfactants to lower surface tension is the presence of a hydrophilic "head" and hydrophobic "tail".

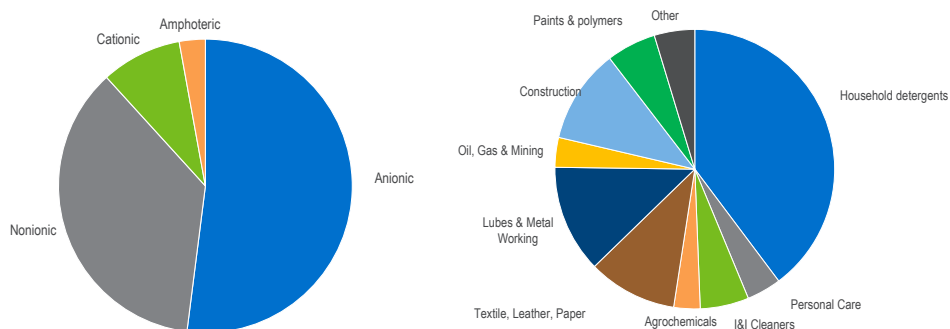
Depending on the charge of the hydrophilic *head*, surfactants are primarily divided into four classes:

- Anionic: negative charge. For example, sulfonates ($R-SO_3^-$) such as linear alkyl sulfonate (LAS) or alcohol sulfates (AS)
- Nonionic: no charge (e.g., ethoxylates), $R-(OCH_2CH_2)_n$
- Cationic: positive charge, for instance, Quaternary Ammonium Compounds "Quats", R_4N^+
- Amphoteric: positive and negative charged (e.g., sulfobetaines $RN^+(CH_3)_2CH_2CH_2SO_3^-$)

The surfactants business has a wide range of chemistries and feedstocks, as well as a wide range of end-uses. Feedstock suppliers can be petrochemical or oleochemical producers, depending on whether natural or synthetic surfactants are being produced.

Surfactants can be used in diverse end-markets.

Global Surfactants Demand by Product and End Use



Surfactants can be tailored to provide different functionalities and performance depending on the end-market needs. Household cleaning and detergents are one of the most widely required function where surfactants are typically used in. Globally, the largest market by far is household detergents.

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