

Squalene Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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Abstracts

The squalene industry represents a specialized segment of the global functional lipids and high-value bio-based ingredients market, characterized by its unique chemical properties, diverse end-use applications, and accelerating shift toward sustainable and ethically sourced materials. Squalene (and its stabilized derivative squalane) is valued for exceptional biocompatibility, oxidative stability, moisturizing capacity, and biological functionality, making it a critical input for cosmetics, dietary supplements, and pharmaceutical/vaccine formulations. Historically extracted from shark liver oil, the industry has undergone a transformative shift driven by environmental regulation, ethical concerns, biotechnology innovation, and the growing global emphasis on sustainability. These forces have catalyzed a rapid decline in shark-derived supply and a corresponding rise in plant-based and synthetic/fermentation-based production pathways.

Market Size and Growth Forecast

Based on industry analyses, corporate disclosures, and long-term demand patterns across cosmetics and pharmaceutical sectors, the global squalene market is estimated to reach 150–200 million USD in 2025, with an expected compound annual growth rate (CAGR) of 7%–9% through 2030. Growth is primarily supported by rising demand for natural and sustainable cosmetic ingredients, increasing vaccine production requiring squalene-based adjuvants, expanding nutraceutical consumption, and major technological advances in synthetic biology that are reshaping the competitive landscape of the industry.

Regional Analysis

Demand for squalene is global but unevenly distributed, reflecting differences in cosmetics consumption, pharmaceutical manufacturing maturity, and regulatory environments. Across regions, estimated growth rates fall within distinct ranges given end-market development and shifts in supply chain structures.

Asia Pacific (8%–10% growth)

Asia Pacific represents the fastest-growing squalene consumer region due to substantial cosmetics consumption in China, Japan, and South Korea; strong nutraceutical demand; and rapidly expanding regional production capacity for bio-based ingredients. China, in particular, has emerged as both a major producer and consumer, driven by a large beauty and personal care market and the presence of large-scale fermentation and plant-based squalene manufacturers such as Yichun Dahaigui Life Science. Southeast Asian markets further contribute to growth through natural ingredient processing and expanding dietary supplement adoption. Regional biotechnology investments and proximity to oleochemical supply chains strengthen APAC's long-term strategic position.

North America (6.5%–8% growth)

North America benefits from strong demand for premium cosmetics, the expansion of sustainable beauty formulations, and advanced biotechnology ecosystems that support fermentation-based squalene production. The United States is a major hub for synthetic biology development, hosting companies focused on fermentation routes and plant engineering for squalene production. Pharmaceutical usage also contributes meaningfully, as U.S. and Canadian vaccine developers frequently utilize squalene-based adjuvants for immunogenicity enhancement. Regulatory preferences for sustainable sourcing further accelerate the shift toward fermentation and plant-derived supply.

Europe (6%–7.5% growth)

Europe remains a leading region for sustainable cosmetic formulations and pharmaceutical applications. A defining factor in the region is the EU environmental regulation prohibiting the import of shark-derived squalene beginning in 2025, which

accelerates the structural shift toward bio-fermented and plant-based squalene. European personal care brands are key adopters of ethical sourcing commitments, and the region's cosmetics market is an early mover in replacing animal-derived ingredients. Countries such as France, Italy, and Germany have strong demand for high-purity squalene and squalane, while regional regulatory pressure drives long-term growth in natural or bio-engineered alternatives.

South America (5.5%–6.5% growth)

South America demonstrates steady growth supported by rising consumer spending on skincare, expanding pharmaceutical production in Brazil and Mexico, and increasing adoption of nutraceuticals. Although regional production capacity is limited, demand is shaped by the growing presence of international cosmetic brands and the transition away from animal-derived lipids. Improvements in regional distribution networks and rising awareness of sustainable beauty ingredients contribute to ongoing demand expansion.

Middle East & Africa (4.5%–6% growth)

The MEA region shows moderate but stable growth driven by emerging consumer interest in premium skincare, rising healthcare investment in Gulf countries, and gradual adoption of dietary supplements. While local production remains minimal, import demand for high-purity cosmetic-grade squalene and pharmaceutical ingredients continues to increase. Growth is largely linked to expanding retail beauty markets and development of regional vaccine manufacturing capacity.

Application Analysis

Squalene's versatility gives rise to three major application categories, each with distinct performance drivers and growth dynamics. Across segments, estimated growth rates reflect differences in industrial uptake, regulatory pressures, and innovation cycles.

Cosmetics (7%–9% growth)

Cosmetics represent the largest and most established application segment. Squalene's excellent emollient, moisturizing, and dermal absorption characteristics make it a

preferred ingredient in skincare, facial oils, lotions, anti-aging formulations, and specialty dermatological products. The segment benefits from rising global spending on premium skincare, increasing preference for natural and sustainable ingredients, and consumer perception of squalene as a high-efficacy moisturizing lipid.

Growth is further strengthened by the widespread conversion from shark-derived to fermentation-based or plant-based squalene. Clean beauty trends, corporate sustainability pledges, and brand transparency initiatives reinforce demand for ethically sourced material. As Asia Pacific and North America account for substantial skincare consumption, these regions lead application growth, while Europe advances in sustainable product adoption following regulatory pressures.

Dietary Supplements (6.5%–8% growth)

The dietary supplement segment is supported by increasing global interest in immune health, antioxidant consumption, and functional lipid supplements. Squalene is marketed for its potential antioxidant properties and immune-modulating benefits, contributing to steady growth in nutraceutical formulations. Demand is strongest in Asia Pacific, where traditional use and consumer familiarity with functional marine and plant-derived lipids remain influential.

Advances in plant-derived and fermentation-based production are expanding the availability of high-purity supplement-grade squalene, reducing reliance on variable-quality animal sources. Although scientific consensus on certain health claims varies, rising health awareness and growing middle-class consumption across emerging markets are expected to support continued adoption.

Vaccines/Pharmaceuticals (8%–10% growth)

The pharmaceutical segment shows the fastest growth rate due to increasing global vaccine production and expanding use of squalene-based adjuvants, which enhance antigen effectiveness in several modern vaccine platforms. The importance of adjuvant systems in pandemic preparedness and the expansion of vaccine manufacturing hubs contribute to strong long-term demand.

As pharmaceutical applications require consistent, high-purity, non-animal-derived raw materials, the segment is one of the strongest drivers pushing the industry toward

fermentation-derived squalene. Governments and vaccine developers prefer traceable, GMP-grade, sustainable sources, generating opportunities for biotech producers specializing in pharmaceutical-grade materials.

Type Analysis

Synthetic Squalene (Fermentation-Based, 8%–10% growth)

Synthetic biology and precision fermentation have become the technological backbone of the industry's transformation. Companies such as Amyris pioneered the use of sugarcane-derived fermentation to produce high-purity squalene, setting new efficiency and sustainability benchmarks. Fermentation-based squalene offers consistent quality, traceability, and scalability, making it preferred for cosmetics and essential for pharmaceutical applications.

The segment's rapid growth is enabled by continued advancements in engineered microbial pathways, improved process yields, supply stability, and alignment with global sustainability policies. Regulatory restrictions on shark-derived squalene further accelerate the adoption of fermentation-based methods. New market entrants, including BioCatSyn Biotech Inc. and Cibus Inc., intensify competition and enhance supply diversity.

Natural Squalene (5%–6.5% growth)

Natural squalene historically originated from shark liver oil but has shifted overwhelmingly toward plant-derived sources such as olive oil, rice bran oil, and amaranth. Due to regulatory restrictions, environmental concerns, and brand commitments to cruelty-free sourcing, the share of shark-derived supply has fallen dramatically—from ~40% in 2013 to ~11.5% in 2018. Most remaining natural squalene now comes from plant extraction or plant engineering routes.

Plant-derived squalene is valued for natural-positioning in cosmetics and dietary supplements but is subject to agricultural variability and higher cost structures. Nevertheless, improvements in oil extraction efficiency and agricultural biotechnology continue to support moderate growth.

Key Market Players

Amyris: A global pioneer in fermentation-based squalene, Amyris established the first large-scale commercial synthetic biology platform for squalene derived from sugarcane. The company became the world's largest producer of bio-fermented squalene and, in May 2023, licensed exclusive rights for sustainable squalene supply to Croda International. Amyris' technological innovations shaped industry standards and accelerated the shift away from shark-derived materials.

Kishimoto Special Liver Oil Co. Ltd.: A long-standing producer historically focused on marine-derived squalene. While the global market has shifted toward non-animal sources, companies with traditional expertise maintain niche supply roles and have adapted toward compliance with tightening environmental regulations.

Empresa Figueirense de Pesca (EFP) and VESTAN: Companies with historical involvement in shark-derived squalene production. Their relevance in the modern market is diminishing due to regulatory restrictions, sustainability concerns, and shrinking availability of shark-derived sources.

Green Oleo S.r.l and Wilmar International: Major processors of oleochemicals and plant-derived lipids. These companies play a key role in natural squalene supply chains, leveraging extensive vegetable oil refining capabilities and established distribution networks.

Arbee and Sophim: Producers specializing in high-purity plant-derived squalene and squalane for the cosmetics industry. Sophim is known for advanced refining technologies and supply to premium skincare brands.

BioCatSyn Biotech Inc.: A recent entrant in synthetic biology, BioCatSyn introduced a fully synthetic "bio-all-synthetic squalene" platform, with an annual capacity of 180 tons planned for commissioning by late 2025. The company's fully biological production pathway positions it as a competitive force in future supply chains.

Yichun Dahaigui Life Science: One of the world's largest squalene producers, with 1,500 tons per year capacity—approximately one-third of global output. The company plays a crucial role in the global shift toward plant-based and bio-derived squalene, particularly in Asia Pacific.

Synceres Biosciences: A biotechnology-driven company developing fermentation-based squalene production systems and integrated synthetic biology solutions.

Cibus Inc. (formerly Calyxt Inc.): Following a merger completed on June 1, 2023, Cibus leveraged Calyxt's plant-based squalene achievements—particularly the successful production of plant-derived squalene in 2022—to accelerate agricultural biotechnology routes for sustainable lipid production.

United Laboratories: An established pharmaceutical ingredient manufacturer exploring biological production pathways for specialty lipids including squalene, supported by strong fermentation capabilities.

Industry Value Chain Analysis

The squalene value chain spans raw materials sourcing, biological or chemical processing, refining, and application-specific formulation. Modern value chains are increasingly dominated by plant-based and fermentation-derived supply pathways.

Upstream includes sugarcane feedstock for fermentation, vegetable oils for extraction, and biotechnology inputs required for microbial engineering. For natural squalene, olive oil and rice bran oil remain important feedstocks, though subject to agricultural price swings.

Midstream processing involves fermentation bioreactors, lipid extraction, hydrogenation (when converting to squalane), solvent refining, and purification to meet cosmetic or pharmaceutical grades. Companies with advanced synthetic biology capabilities enjoy significant cost and quality advantages due to high conversion efficiency and stable feedstock pricing.

Downstream includes cosmetic formulators, pharmaceutical companies requiring vaccine adjuvants, and nutraceutical producers. Regulatory compliance, sustainability certification, and full traceability are increasingly required by global brands, shifting competitive advantage toward bio-fermentation producers.

The global value chain continues to undergo restructuring as supply transitions from animal-derived sources to biotechnology-driven production models.

Market Opportunities and Challenges

Opportunities

Sustainability as a structural growth driver: The industry is experiencing a permanent shift toward bio-based and traceable production, creating long-term demand for fermentation-derived squalene.

Rapid expansion of vaccine manufacturing: Increasing global immunization initiatives and pandemic preparedness programs drive demand for high-purity pharmaceutical-grade squalene.

Growth in premium cosmetics: Rising adoption of natural ingredients and clean-label skincare formulations sustains demand across established and emerging markets.

Advances in synthetic biology: New fermentation technologies improve yields and reduce costs, enabling scalable and sustainable production beyond traditional constraints.

Challenges

Regulatory shifts and environmental restrictions: The EU's prohibition of shark-derived squalene imports (effective 2025) accelerates supply chain restructuring but raises short-term transition costs for traditional suppliers.

Raw material and feedstock volatility: Plant-derived squalene depends on variable agricultural cycles, while fermentation feedstocks face cost pressures linked to global sugar and biofuel markets.

Global supply chain reorganization: Trade fragmentation, geopolitical uncertainties, and shifting tariff policies under the Trump Administration create unpredictability in cross-border ingredient flows, affecting production costs and supply reliability.

Market competition intensification: Entry of new synthetic biology companies increases competitive pressure, potentially driving rapid price normalization.

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