

Glycerol Market Forecasts to 2032 – Global Analysis By Product (Refined Glycerol and Crude Glycerol), Source (Biodiesel, Fatty Alcohols, Fatty Acids and Soap Industry), Application and By Geography

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Abstracts

According to Statistics MRC, the Global Glycerol Market is accounted for \$5.46 billion in 2025 and is expected to reach \$7.14 billion by 2032 growing at a CAGR of 3.90% during the forecast period. Glycerol, sometimes referred to as glycerin or glycerine, is a straightforward polyol that finds extensive application in the food, cosmetic, and pharmaceutical sectors. It is a sweet-tasting, colorless, odorless, and viscous liquid that dissolves readily in water. Usually, plant and animal fats are used to make glycerol when soap or biodiesel is being made. It is essential for preserving moisture in skincare products and functions as a humectant, solvent, and preservative in various formulations. It is utilized as a laxative and in cough syrups and elixirs in the pharmaceutical industry.

According to the OECD's SIDS Initial Assessment, the worldwide glycerol market reached approximately 500,000 tonnes/year in 2000, with 227,000 tonnes produced or imported in Europe that year. It noted glycerol's ubiquitous composition in industrial, professional, and consumer products—ranging from soaps and detergents to pharmaceuticals, cosmetics, food, and paints.

Market Dynamics:

Driver:

Increasing demand for cosmetics and personal care products

Glycerol's humectant, skin-soothing, and moisturizing qualities make it an essential component of the personal care and cosmetics industries. It is widely utilized in many different skincare and hygiene products, such as shaving gels, lotions, creams, soaps, shampoos, and toothpaste. Glycerol's popularity has significantly increased as consumers' concerns about their health have grown and they are gravitating toward natural, sustainable ingredients in their cosmetics. High-quality, multipurpose ingredients like glycerol are in high demand due to the growth in disposable income in developing nations and the popularity of online cosmetic retail. Furthermore, manufacturers have been compelled to use glycerol derived from plant sources due to the growing demand for vegan and cruelty-free products, highlighting its significance in the value chain of cosmetics.

Restraint:

Expensive purification and refining for technical and pharmaceutical grades

Crude glycerol is widely available and reasonably priced, but expensive refining procedures are needed to transform it into high-purity forms fit for use in food, medicine, or cosmetics. These processes, which call for energy-intensive equipment and stringent quality control, include vacuum evaporation, neutralization, bleaching, and distillation. The high-margin glycerol market segments may be inaccessible to small and mid-sized manufacturers due to these capital and operating costs. Additionally, the management and disposal of waste from refining processes adds to the operational burden as environmental regulations increase. Particularly in developing nations, this restricts scalability and serves as a barrier to market entry.

Opportunity:

Growing interest in green alternatives and bio-based chemicals

As a renewable, bio-based substitute for chemicals derived from petroleum, glycerol is seeing tremendous growth as a result of the global movement toward sustainability. Eco-friendly feedstocks are being used by industries like plastics, resins, solvents, and lubricants as a result of growing regulatory pressure to lessen carbon footprints and reliance on fossil fuels. Because it is non-toxic, biodegradable, and readily available from the production of biodiesel, glycerol is a perfect starting point for creating environmentally friendly compounds. Its transformation into derivatives with added value, such as propylene glycol, acrolein, and glycerol carbonate, is becoming more popular in the chemical industry. Moreover, the demand for glycerol as a platform

chemical is anticipated to increase in the upcoming years due to government and corporate investments in sustainable supply chains.

Threat:

Market oversaturation and extended overstock

Global oversupply, which is mostly caused by the biodiesel sector, is one of the most enduring threats to the glycerol market. Since glycerol is a byproduct of the production of biodiesel, any significant increase in the production of biofuels leads to the introduction of excess crude glycerol into the market. Particularly for refined and pharmaceutical-grade glycerol, this overabundance of supply continues to exceed demand, which drives down prices and reduces producer profitability. Sometimes the market is so oversupplied that crude glycerol is burned or used for low-value products like fuel or animal feed. Additionally, this saturation may present long-term operational and financial risks for manufacturers if strategic measures are not taken to diversify their end markets or create high-value downstream uses.

Covid-19 Impact:

The COVID-19 pandemic affected the glycerol market in a variety of ways. In the pharmaceutical, personal care, and hygiene product industries, where glycerol is a crucial component of hand sanitizers, disinfectants, cough syrups, and skincare products, demand increased. Sales and production in these segments were momentarily increased as a result. However, shortages of raw materials and price swings resulted from disruptions in the global supply chain, such as transportation restrictions and the temporary closure of biodiesel plants, which are significant sources of crude glycerol. Additionally, demand in industries like paints, resins, and a construction chemical was impacted by the decreased industrial activity during lockdowns. Despite these obstacles, the market was stabilized by glycerol's crucial role in health and hygiene products, and it is currently expected to grow steadily after the pandemic.

The refined glycerol segment is expected to be the largest during the forecast period

The refined glycerol segment is expected to account for the largest market share during the forecast period. Its extensive use in high-value sectors like food and beverage, personal care, cosmetics, and pharmaceuticals—where consistency and purity are crucial—is what propels its dominance. Refined glycerol is suitable for sensitive

formulations because it is subjected to rigorous purification procedures to eliminate impurities like methanol, salts, and water. It normally has a purity of 95% or higher. Its well-known safety record and endorsements from important regulatory agencies like the FDA and EFSA increase demand for it even more. Furthermore, the need for premium, refined glycerol is increasing as end-use industries spread throughout the world, especially in developing nations, which strengthens its market-leading position.

The biodiesel segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the biodiesel segment is predicted to witness the highest growth rate. Glycerol is a significant by-product of the transesterification process used to make biodiesel; approximately 10% of the biodiesel produced is crude glycerol. The production of biodiesel is increasing dramatically as governments around the world encourage the use of renewable fuels to lower carbon emissions—through mandates, subsidies, and blending targets—particularly in Southeast Asia, Brazil, Europe, and the United States. In addition to increasing the supply of glycerol, this expansion spurs technological advancements in its recovery and purification. Moreover, it is anticipated that the expanding biodiesel sector will achieve the fastest growth rate in the glycerol market owing to the circular economy model and global sustainability goals.

Region with largest share:

During the forecast period, the Asia-Pacific region is expected to hold the largest market share, driven by its extensive production and use in important sectors like biodiesel, food and beverage, pharmaceuticals, and personal care. The world's supply of crude and refined glycerol is dominated by major producers such as China, Malaysia, and Indonesia, in large part because of their plentiful supply of palm oil and other vegetable oils used as feedstock. High domestic demand for glycerol-based products is also a result of the region's rapidly expanding industrial base, rising disposable incomes, and rapidly growing population. Additionally, glycerol production is further increased by robust government support for biodiesel blending initiatives in nations like Indonesia and India, securing Asia-Pacific's dominance in terms of production volume and market share.

Region with highest CAGR:

Over the forecast period, the Middle East & Africa region is anticipated to exhibit the highest CAGR, driven by growing investments in the production of biodiesel, the growth of the pharmaceutical and personal care industries, and an increased emphasis on

industrial diversification. To lessen their dependency on petrochemicals and increase sustainability, nations like Saudi Arabia, the United Arab Emirates, and South Africa are progressively improving their bio-based chemical capabilities. The demand for glycerol in consumer goods, medications, and hygiene products is also being boosted by the region's expanding population, urbanization, and advancing healthcare infrastructure. Furthermore, glycerol consumption and industrial integration in the Middle East and Africa are expected to rise quickly due to favorable government regulations and new local manufacturing projects.

Key players in the market

Some of the key players in Glycerol Market include BASF SE, Cargill, Incorporated, Procter & Gamble Company, Dow Chemicals Inc, Wilmar International Ltd, KLK OLEO (KL-Kepong Oleomas), Oleon NV, Archer Daniels Midland (ADM), Kao Corporation, Godrej Industries Limited, Solvay SA, Emery Oleochemicals and Sakamoto Yakuhin Kogyo Co.Ltd.

Key Developments:

In May 2025, Cargill Inc reached a settlement with fast-food giant McDonald's Corp. over its antitrust claims, which alleged price fixing by beef suppliers. The announcement stems from a lawsuit McDonald's filed in October 2024 against leading meatpackers Cargill, JBS, Swift Beef Co., National Beef Packing Co. and Tyson Foods claiming that they conspired to fix beef prices at artificially high levels by limiting beef supplies starting as early as 2015 through the time of the filing, in violation of the Sherman Act.

In December 2024, BASF and INOCAS S.A. signed a long-term supplier finance agreement, including offtake of Maca?ba Kernel Oil and Maca?ba Pulp Oil, an R&D project and options to acquire equity shares in INOCAS in future. The partnership includes financing of INOCAS' plans to significantly expand the Maca?ba oil production in Brazil on an industrial scale, strengthening the country's position in the bioeconomy.

In May 2024, Dow announced a capacity expansion from its minority equity investment in SAS Chemicals GmbH, a German-based specialty chemical producer of sealants and components used in insulating glass manufacturing, to create a more holistic fa?ade offering. For over five decades, silicone insulating glass sealants from Dow have been used in various commercial structural glazing applications, providing superior UV resistance and structural capability, as well as inspiring designers to create unique architectural possibilities for glass fa?ades.

Product Types Covered:

Refined Glycerol

Crude Glycerol

Sources Covered:

Biodiesel

Fatty Alcohols

Fatty Acids

Soap Industry

Applications Covered:

Food & Beverages

Alkyd Resins

Polyether Polyols

Tobacco Humectants

Personal Care & Pharmaceuticals

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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