

Squalene Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Source (Animal Based Squalene, Plant Based Squalene, Biosynthetic Squalene), By End User Industry (Cosmetics, Pharmaceuticals, Food, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Squalene Market is projected to expand from USD 185.68 Million in 2025 to USD 347.86 Million by 2031, achieving a CAGR of 11.03%. As a natural organic triterpene, squalene is extensively used in the pharmaceutical, cosmetic, and nutraceutical industries due to its efficacy as a vaccine adjuvant and its superior emollient qualities. Market growth is chiefly driven by rising consumer appetite for advanced anti-aging and hydrating skincare products, alongside the urgent requirement for potent immune-boosting agents in medicine. These primary drivers are bolstered by the vast commercial magnitude of end-use sectors that depend on such functional ingredients to satisfy increasing performance expectations.

However, market progression faces a hurdle regarding the intense environmental and ethical criticism of shark-derived squalene, necessitating a difficult and expensive shift toward biosynthetic or plant-based substitutes. This transition introduces price instability and supply chain stress, potentially restricting ingredient usage in cost-conscious markets. Despite these operational difficulties, the fundamental demand remains strong, as illustrated by recent market figures. According to Cosmetics Europe, the European personal care and cosmetics market reached a value of ?96 billion in 2023, highlighting the massive economic environment driving the uptake of versatile components like squalene.

Market Driver

A major force driving the global squalene market is the escalating demand for natural and organic personal care ingredients. With consumers emphasizing ethical sourcing, manufacturers are swiftly reformulating their lineups to swap shark-derived squalene for sustainable biosynthetic or plant-based options. This shift is hastened by the "clean beauty" trend, which places a high value on effective skin barrier restoration ingredients. This trajectory is validated by the financial results of leading companies prioritizing active skin health; according to L'Oreal's 2023 Annual Report published in February 2024, their Dermatological Beauty Division recorded a sales surge of 28.4%, demonstrating the market's hunger for clinically proven skincare containing essential lipids like squalene.

Additionally, the expanding use of squalene in vaccine adjuvants acts as a crucial driver, broadening the market's scope beyond cosmetics. Squalene emulsions are vital for modern vaccine formulation, especially for influenza, as they improve immune response while lowering antigen dosage requirements. The commercial viability of these solutions is reinforcing as healthcare systems prioritize robust immunization programs. According to CSL Limited's 'Annual Report 2024' from August 2024, CSL Seqirus noted a 14% sales rise for FLUAD, its adjuvanted influenza vaccine, underlining the dependence on squalene-based enhancements. Reflecting this demand across the supply chain, Bloomage Biotech reported an 11.02% revenue increase in its raw materials business during the first half of 2024, confirming the steady need for premium bioactive ingredients.

Market Challenge

The expansion of the global squalene market is significantly hindered by severe environmental and ethical criticism regarding squalene sourced from sharks. Producers are increasingly forced to move away from economical shark liver oil toward biosynthetic or plant-based options to meet sustainability expectations. This migration induces considerable supply chain strain and price instability, as agricultural raw materials are vulnerable to complex extraction methods and seasonal yield variations. Consequently, the increased production costs linked to these ethical substitutes limit their feasibility in lower-margin categories, effectively restricting volume growth within the wider mass market.

This pressure from consumers creates tangible market risks for businesses that do not adapt. According to Cosmetics Alliance Canada, data from 2024 reveals that 84% of

consumers in the United States expressed a willingness to change brands to guarantee their products are free from shark-derived materials. This broad rejection of traditional sourcing compels industry participants to reallocate capital toward expensive supply chain restructuring and reformulation rather than market growth initiatives. As a result, the financial costs associated with compliance retard the overall penetration of squalene within the highly competitive personal care sector.

Market Trends

The supply dynamics of the global squalene industry are being rapidly transformed by the commercialization of biosynthetic fermentation technologies, as producers look for scalable, high-purity substitutes for volatile botanical and marine sources. This technological advancement enables the reliable creation of bio-identical squalene from renewable resources such as sugarcane, thereby reducing supply chain risks linked to seasonal olive crops and shark liver oil. The feasibility of this approach is highlighted by the success of brands rooted in synthetic biology; according to THG's 'Preliminary FY 2023 Results' from April 2024, its flagship biotech brand Biossance has accumulated roughly \$300 million in global revenue since its launch, proving the strong commercial demand for fermentation-derived squalene in high-end skincare.

Concurrently, the integration of squalene into vegan and clean label beauty products represents a significant trend, with formulators aggressively shifting toward cruelty-free and certified organic ingredients to meet ethical consumer demands. This movement transcends mere ingredient replacement, prompting entire product ranges to embrace transparent sourcing protocols that eliminate animal-derived components. This sector's resilience is clear even amidst economic challenges impacting discretionary spending. According to the Soil Association's 'Organic Beauty and Wellbeing Market Report 2024' released in April 2024, the Health and Personal Care segment of the certified organic market realized a 6% growth rate, indicating a persistent consumer preference for rigorously verified, plant-based formulations utilizing ingredients like phyto-squalene.

Key Market Players

Amyris, Inc

Merck KGaA

Kishimoto Special Liver Oil Co., Ltd.

Sophim

Empresa Figueirense De Pesca, Lda

Cibus Ltd.

Arbee Biomarine Extracts Pvt Ltd

Nucelis LLC

Maruha Nichiro Corporation

Gracefruit Limited

Report Scope

In this report, the Global Squalene Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Squalene Market, By Source

Animal Based Squalene

Plant Based Squalene

Biosynthetic Squalene

Squalene Market, By End User Industry

Cosmetics

Pharmaceuticals

Food

Others

Squalene Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Squalene Market.

Available Customizations:

Global Squalene Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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