

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) market size is expected to reach \$ 3540 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

In 2025, global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) production reached approximately 135,318 tons, with a average price of 17.8 USD/kg.

EPA (eicosapentaenoic acid) and DHA (docosahexaenoic acid) are two long-chain Omega-3 polyunsaturated fatty acids that are vital for human health. They are primarily found in deep-sea cold-water fish, shellfish, and microalgae. Since the human body converts plant-derived fatty acids (ALA) into EPA and DHA with extremely low efficiency, obtaining them directly through diet or nutritional supplements remains the only practical means of maintaining adequate levels within the body.

Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) are long-chain omega-3 polyunsaturated fatty acids. EPA refers to eicosapentaenoic acid, while DHA refers to docosahexaenoic acid. They are key functional lipids associated with cardiovascular health, neurodevelopment, retinal function, inflammatory modulation, and lipid metabolism. In industrial terms, Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) are not simply equivalent to generic fish oil; they refer to nutritional ingredients, food additives, pharmaceutical raw materials, and functional health products produced from fish oil, algal oil, krill oil, and certain marine by-product oils through refining, concentration, purification, esterification, re-esterification, microencapsulation, or dosage-form processing. Commercial forms include refined oils, concentrated oils, ethyl ester oils, triglyceride oils, powders, emulsions, softgels, liquid

formulations, and pharmaceutical-grade high-purity EPA/DHA ingredients. Major applications include dietary supplements, infant formula, functional food and beverages, clinical nutrition, prescription omega-3 products, and pet nutrition.

The Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) industry is mainly built around two production models: marine oil extraction and concentration, and microalgae fermentation followed by oil extraction and refining. The marine route uses sources such as Peruvian anchovy, sardine, tuna by-products, mackerel, and cod liver oil, followed by crude oil sourcing, degumming, deacidification, bleaching, deodorization, molecular distillation, esterification/re-esterification, concentration, and antioxidant stabilization to produce refined fish oil, medium-to-high concentration EPA/DHA oils, and premium rTG products. The algal route is built on microalgae strains, fermentation tanks, culture media, extraction, and refining, making it suitable for vegan, sustainable, infant nutrition, and premium supplement applications. Industry gross margins vary significantly: low-concentration refined fish oils and commodity-grade materials are typically around 12%–25%; medium-to-high concentration oils, powders, and customized formulations are around 25%–45%; pharmaceutical-grade high-purity EPA, proprietary algal oils, and high-concentration rTG products can reach around 40%–65%. Actual profitability is influenced by fish oil raw material prices, Peruvian anchovy seasons, oxidative stability, certification systems, regulatory registrations, and long-term customer contracts. The upstream chain focuses on marine resources, algal strains, and fermentation inputs; midstream competition centers on purification, concentration efficiency, odor control, contaminant management, batch consistency, and compliance documentation; downstream demand is driven by supplement brands, infant formula companies, pharmaceutical firms, functional food manufacturers, pet nutrition brands, and CDMO customers.

Market Development Opportunities & Main Driving Factors

The core market opportunity for Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) is created by the convergence of evidence-based nutrition, sustainable sourcing, and premium dosage-form innovation. Rising consumer awareness of cardiovascular management, maternal and infant nutrition, cognitive health, eye health, and proactive wellness is shifting EPA/DHA from traditional fish oil supplementation into a high-value functional lipid platform. Algal EPA/DHA is particularly attractive because it is independent of marine fisheries and fits vegan, clean-label, sustainable sourcing, and premium infant nutrition requirements. Leading companies are also moving from conventional fish oil toward proprietary algal oils, high-concentration oils, customized formulations, and pharmaceutical-grade ingredients. With the ingredient market

returning to growth in 2024, high potency, low odor, smaller serving size, traceability, and compliant labeling are becoming major levers for brand differentiation.

Market Challenges, Risks, & Restraints

The main risks lie in raw material cyclicalities, price transmission, quality compliance, and the boundaries of health claims. Fish oil supply is highly exposed to Peruvian anchovy seasons, El Niño events, regional quotas, and changes in fatty acid profiles, and the supply volatility after 2023 has made inventory control, long-term procurement, and multi-source sourcing more important. Although fish oil production recovered in 2024, regional declines and pricing pressure still affect margin stability. EPA/DHA is also a nutrition ingredient with strong consumer recognition and high regulatory sensitivity, requiring strict control of contaminants, oxidation indicators, heavy metals, batch traceability, label accuracy, and health claims. For smaller players, weaker raw material bargaining power, limited concentration technology, rising certification costs, and price pressure from downstream brands will continue to compress profitability in low-end products.

Downstream Demand Trends

Downstream demand is moving from single-format fish oil softgels toward multi-scenario, precise-dosage, and better-sensory formulations. Dietary supplements remain one of the largest applications, but growth is shifting toward high-concentration EPA/DHA, smaller softgels, liquid drops, gummies, emulsions, ready-to-drink products, clinical nutrition, and pet health. Infant formula and maternal nutrition emphasize stable DHA supply and high safety standards, while the pharmaceutical segment focuses on high-purity EPA or specific EPA/DHA ratios. Future competition will no longer be determined only by oil price per kilogram; it will depend on sustainability, dosage-form compatibility, odor control, oxidative stability, regulatory documentation, and co-development capability with customers. Integrated producers with algal fermentation, fish oil concentration, pharmaceutical-grade registration, microencapsulation, and finished dosage-form capabilities are positioned to gain stronger pricing power in premium nutrition and professional health markets.

This report studies the global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) and provides

market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) total production and demand, 2021-2032, (Tons)

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) total production value, 2021-2032, (USD Million)

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) domestic production, consumption, key domestic manufacturers and share

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include dsm-firmenich, KD Pharma, Croda, BASF, Yuwang Pharma, Corbion, GC Rieber VivoMega, Pelagia (EPAX), Golden Omega, TASA, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Kg) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) Market, Segmentation by Type:

EPA

DHA

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) Market, Segmentation by Source:

Fish Oil EPA and DHA

Algae Oil EPA and DHA

Others

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) Market,
Segmentation by Grade:

Food Grade

Pharma Grade

Feed Grade

Global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) Market,
Segmentation by Application:

Dietary Supplements

Fortified Food and Beverages

Infant Formula

Pharmaceuticals

Pet Food

Others

Companies Profiled:

dsm-firmenich

KD Pharma

Croda

BASF

Yuwang Pharma

Corbion

GC Rieber VivoMega

Pelagia (EPAX)

Golden Omega

TASA

KinOmega Biopharm

Omega Protein

Huatai Phrama

AlaskOmega (Wiley Companies)

Jiangsu Auqi Marine Biotechnology

Roquette

Polaris

Solutex

Sinomega Biotech Engineering

Xinzhou Marine Biological Products

ADM

Nu-Mega (Clover)

Guangdong Runke Bioengineering

Nissui

Cabio Biotech

Skuny Bioscience

Fermentalg

Renpu Pharmaceuticals

Xiamen HUISON Biotech

Xiamen Kingdomway

Algarithm

Hubei Fuxing Biological Technology

Key Questions Answered:

1. How big is the global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) market?
2. What is the demand of the global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) market?
3. What is the year over year growth of the global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) market?
4. What is the production and production value of the global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) market?
5. Who are the key producers in the global Eicosapentaenoic Acid and Docosahexaenoic Acid (EPA and DHA) market?
6. What are the growth factors driving the market demand?

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