

Omega-3 Polyunsaturated Fatty Acids (PUFAs) – A Global Market Overview

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Abstracts

REPORT SYNOPSIS

COVID-19 pandemic effect on the global Omega-3 ingredients market varied materially by country and end-use applications, depending on the timing of the outbreak and consumer behavior. Overall, the impact of coronavirus on global Omega-3 was moderate in 2020 and expected to recover significantly in 2021.

Omega-3s demand in animal/pet nutrition applications was least impacted by the pandemic, as these ingredients have been considered most essential for animal health. Demand from Omega-3s in pharmaceuticals was firm as these drugs are prescribed to at-risk patients. Strong increase in prescription levels was observed during the second half of 2020, partially offset by lower levels in the second quarter of the year.

Research Findings & Coverage

Worldwide market for Omega-3 is analyzed in this report with respect to raw material sources and end-use applications

Omega-3 market size is reported in this study by raw material source and end-use application across all major regions/countries

Dismissal of Amarin Pharma's Lawsuit Exonerates the Omega-3 Dietary Supplement Industry

Docosapentaenoic Acid (DPA) Reappears on the Omega-3 Fatty Acid Horizon

Algae Sources Offer Immense Scope for Global Omega-3s Market

Key business trends focusing on product innovations/developments, M&As, JVs and other recent industry developments

Major companies profiled – 124

The industry guide includes the contact details for 319 companies

PRODUCT OUTLINE

The report analyzes the global market for the following key material sources of Omega-3:

Marine

Algal

The market for major applications of Omega-3 explored in this report comprise the following:

Dietary Supplements

Animal Nutrition

Food & Beverages

Infant Nutrition

Pharmaceuticals

Clinical Nutrition

Analysis Period, Units and Growth Rates

The report reviews, analyzes and projects the global Omega-3 market for the

period 2017-2026 in terms of market value in US\$ and volume in metric tons; and the compound annual growth rates (CAGRs) projected from 2019 through 2026 with a special focus on y-o-y for 2019-2020

Geographic Coverage

North America (The United States, Canada and Mexico)

Europe (Denmark, France, Germany, Italy, Norway, Spain, the United Kingdom and Rest of Europe)

Asia-Pacific (Australia, China, Japan, India, South Korea and Rest of Asia-Pacific)

South America (Argentina, Brazil and Rest of South America)

Rest of World

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Archer Daniels Midland Company (United States)
Austral Group S.A.A. (Peru)
BASF SE (Germany)
Berg Lipidtech AS (BLT) (Norway)
Cellana LLC (United States)
Chemport, Inc. (South Korea)
Croda International PLC (United Kingdom)
Denomega (Orkla Health) (Norway)
DSM Nutritional Products AG (Switzerland)
Epax AS (Norway)
Evonik Nutrition & Care GmbH (Germany)
GC Rieber VivoMega AS (Norway)
Golden Omega SA (Chile)
Guangdong Runke Bioengineering Co Ltd (China)
Huatai Biopharm Inc. (China)
Jiangsu Auqi Marine Biotechnology Co., Ltd. (China)
KD Pharma Group SA (Switzerland)
LYSI Hf. (Iceland)
Nippon Suisan Kaisha, Ltd. (Nissui) (Japan)
Novasep Holding SAS (France)
Olvea Fish Oils (Olvea Group) (France)
Omega Protein Corporation (United States)
Polaris (France)
Qualitas Health Inc (United States)
Seven Seas Ltd (United Kingdom)
Sinomega Biotech Engineering Co Ltd (China)
Solutex GC, S.L. (Spain)
Stepan Company (United States)
TASA Omega SA (Tecnológica De Alimentos SA) (Peru)
Thai Union Group PCL (Thailand)
Wiley Companies (United States)

5. KEY BUSINESS AND PRODUCT TRENDS

Aker BioMarine in a Research Collaboration for Alzheimer's with LPC-bound EPA/DHA
Aker BioMarine in an Agreement to Develop Therapies for Brain and Eye Health Based

on its LYSOVETA Product

Meelung Trading Co. Ltd to Distribute GC Rieber's VivoMega Omega-3 oils in Taiwan

Bioscope Viet Nam to Distribute GC Rieber's VivoMega in Vietnam

Epax Norway to Research for New Marine Fatty Acids

Aker BioMarine Launches LYSOVETA Business Segment

GC Rieber Oils Renamed as GC Rieber VivoMega

Thai Union to expand Adoption of Corbion's Algaprime DHA into Shrimp Aquaculture

KD Pharma Group Launches MOVE3 Softgels in co-operation with Stratum Nutrition

DSM Introduces life'sDHA SF55-O200DS High Potency DHA Oils

New Drug Candidate from KD Pharma Group and SLA Pharma Enters into Covid-19 Clinical Trial

Matinas BioPharma Initiates ENHANCE-IT Study of MAT9001 Against Vascepa

Wiley Companies Launches MSC-certified Omega-3 Concentrate Powder

Kirk Kapital Acquires Stake in GC Rieber VivoMega

GC Rieber Oils Collaborates with Barrington Nutritionals to Distribute VivoMega Omega-3 Fish Oils

Vascepa is Now the First and Only FDA-Approved Drug for Reducing Cardiovascular Risk

US FDA Acknowledged Aker BioMarine QRILL Pet as GRAS

Two-Year Krill Oil Supply Pact Formed by Acasti and Aker BioMarine

Epax to Increase Production Capacity of Omega-3 Oils by Over 50% by 2021

Continued Expansion of BioMar Feed with AlgaPrime DHA

Progress in Acasti's TRILOGY Phase 3 Clinical Trials in Severe Hypertriglyceridemia Patients

Omegavie DHA 700 Algae Sensory Oil Launched by Polaris

NRC IRAP Awarded Funding to Acasti Pharma to Enhance CaPre Production Capacity

USDA Deregulated Cargill's Proprietary Canola for Cultivation in the United States

US PTO Granted Patent for Aker BioMarine's Flexitech Technology

Commercial Production of Omega-3 Fatty Acids Started in Veramaris Facility

Arctic Nutrition Joined Forces with Kotler to Gain Entry into the Chinese Market

ADM Along with Qualitas Health Introduces a New Line of Algal DHA and EPA Blends

Nesher Pharmaceuticals' Omega-3-Acid Ethyl Esters Capsules Receives Market Approval from FDA

KD Pharma to Expand its Leading Position in the Omega-3 Pharmaceutical Market

HLS Therapeutics Filed a New Drug Submission with Health Canada for Vascepa

KD Nutra Completes Clinical Trial for its Move3 Omega-3 Joint Formula

OmegaTri Acquired by Golden Omega

Lyxia | Xiaozao Tech Completes the Construction of Level A Downstream Algae Extraction Line

Lyxia | Xiaozao Tech to Establish Microalgae Cultivation Facility in Portugal
OLVEA and IQI Inks Deal to Enhance Their Business Quality
Commercial Production of Salmon Fed on Omega-3 Marine Algal Oil by Lingalaks
Marine Ingredients and InnovaGel Combined Systems to Become KD Nutra
Merck KGaA's Consumer Health Business Acquired by P&G
Commissioning of Thai Union Marine Nutrients Tuna Oil Refinery in Rostock, Germany
Mowi is the New Name for Marine Harvest
Supplementation with One Gram of Omacor Lowers Occurrence of Myocardial
Infarction in Low Risk Patients
Launch of Onavita Algal DHA Powder by ADM
Lyxia Starts Broadening Algae Cultivation Operations Facility in China
Introduction of a Sustainable Plant-Based Fish Oil Alternative Launched by Cargill
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Alaska Protein Recovery, LLC (United States)

Algae to Omega (United States)

Algorithm Ingredients, Inc. (Canada)

Algisis, LLC (United States)

Archer Daniels Midland Company (United States)

Cellana LLC (United States)

Corbion, Inc. (United States)

Felda IFFCO LLC (United States)

SourceOne Global Partners

GCI Nutrients, Inc. (United States)

Helios Corp (United States)

Mara Renewables Corporation (Canada)

Nordic Naturals, Inc. (United States)

Novotech Nutraceuticals, Inc. (United States)

Oceans Omega, LLC (United States)

Omega Protein Corporation (United States)

Qualitas Health Inc (United States)

Rimfrost USA, LLC (United States)

Solarvest Bioenergy Inc. (Canada)

Source-Omega LLC (United States)

Stepan Company (United States)

The Wright Group (United States)

Virun, Inc. (United States)

Wiley Companies (United States)

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AlgaeCytes Limited (United Kingdom)
Anklam Extrakt GmbH (Germany)
Arctic Nutrition AS (Norway)
BASF SE (Germany)
Berg Lipidtech AS (BLT) (Norway)
Biosearch, S.A. (Biosearch Life) (Spain)
Bluebiotech International GmbH (Germany)
Brudy Technology S.L. (Spain)
COPALIS (France)
Croda International Plc (United Kingdom)
De Wit Speciality Oils (Netherlands)
Denomega (Orkla Health) (Norway)
DSM Nutritional Products AG (Switzerland)
Epax AS (Norway)
Evonik Nutrition & Care GmbH (Germany)
Fermentalg SA (France)
Antibi?ticos de Le?n SLU (ADL Biopharma) (Spain)
Fortuna Oils AS (Norway)
GC Rieber Oils (Norway)
Henry Lamotte Oils GmbH (Germany)
Hofseth Biocare AS (Norway)
Imperial-Oel-Import Handelsgesellschaft mbH (Germany)
IQI B.V. (Netherlands)
KD Pharma Group (Switzerland)
LYSI hf. (Iceland)
Margildi EHF. (Iceland)
Minami Nutrition (Belgium)
Mowi ASA (Norway)
Noble Harvest AS (Norway)
Norwegian Fish Oil AS (Norway)
Novasep Holding SAS (France)
Olvea Fish Oils (Olvea Group) (France)
Omnipharm SAS (France)
Pharma Marine AS (Norway)
POLARIS (France)
Progress Biotech bv (The Netherlands)
Rimfrost AS (Norway)

Seafoodia (France)
SEANOVA (France)
Seven Seas Ltd (United Kingdom)
Simris Alg AB (Sweden)
Sochim International SPA (Italy)
Solutex GC, S.L. (Spain)
Stepan Lipid Nutrition (Netherlands)
Thai Union Marine Nutrients GmbH (Germany)
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Arjuna Natural Pvt Ltd (India)
Avesthagen Limited (India)
Bioplus Life Sciences Pvt. Ltd. (India)
Bizen Chemical Co Ltd (Japan)
Blueline Foods (India) Pvt Ltd (India)
Chemport, Inc. (South Korea)
Clover Corporation (Nu-Mega) (Australia)
Coastal Exports Corporation (India)
ECA Healthcare Inc (China)
Ennature Biopharma (India Glycols Ltd) (India)
Fenchem Biotek Ltd (China)
Guangdong Runke Bioengineering Co Ltd (China)
Huatai Biopharm Inc. (China)
Jiangsu Auqi Marine Biotechnology Co., Ltd. (China)
Jiangsu Weisikang Food Sci-Tech Development Co., Ltd. (China)
K Pharmtech Co. Ltd. (South Korea)
Kangcare Bioindustry Co., Ltd. (China)
Kinomega Biopharm Inc. (China)
Luhua Biomarine (Shandong) Co., Ltd (China)

Maruha Nichiro Corporation (Japan)
Nippon Suisan Kaisha, Ltd. (NISSUI) (Japan)
Nisshin Pharma Inc. (Japan)
Novosana (Taicang) Co. Ltd. (China)
Phycoil Biotech Korea, Inc. (South Korea)
Qingdao Kangjing Marine Biotechnology Co., Ltd (China)
Qponics Limited (Australia)
Seadragon Marine Oils Ltd (New Zealand)
Shandong Yuwang Pharmaceutical Co., Ltd (China)
Shenzhen Qianhai Xiaozao Technology Ltd./ Lyxia Corporation (China)
Sinomega Biotech Engineering Co Ltd (China)
Skuny Bioscience Co., Ltd. (China)
Thai Union Group PCL (Thailand)
Wuxi Xunda Marine Biological Products Co., Ltd. (China)

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Colpex International S.A.C (Peru)
Corporacion Pesquera Inca S.A.C. (Peru)
Cox & Compañía S.A. (Chile)
Fiordo Austral Group (Chile)
GIHON – Laboratorios Químicos Srl (Argentina)
Golden Omega SA (Chile)
Natural Oils Chile SA (Chile)
Naturmega SA (Colombia)
Pesquera Camanchaca SA (Chile)
Pesquera Diamante SA (Peru)
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About

The past several decades have been witness to research studies that have underscored the significance of omega-3 fatty acids in maintaining heart health, in addition to safeguarding against cancer and birth defects and offsetting symptoms of diabetes, arthritis, cognitive decline, depression and several other conditions.

Omega-3 Polyunsaturated Fatty Acids (PUFAs) have been growing and continues to grow significantly in the future, attributed to the above benefits.

There are many contributing factors that may influence the omega-3s market in the future. Though the predominance of fish oil in the global market for omega-3 has been driving the market and would continue to do so, the scenario of the future is likely to depict a contrasting picture. For one, the market has been witnessing a marked shift towards products with higher concentrations, a trend that has been more conspicuous in the developing world. This has been the consequence of consumers upgrading from lower concentrate products to higher concentrate products in a bid to get more EPA/DHA per capsule or softgel.

Products with higher concentrations offer the benefit of obtaining the similar health promoting levels of EPA and DHA, though in smaller or fewer capsules or softgels.

Pharmaceutical drugs, by default, have started incorporating higher concentrations of omega-3 and it is anticipated that, over the coming few years, several new companies would be jumping on to the bandwagon of omega-3 drugs. Several drugs are in Phase II or Phase III clinical trials, with several more expected to come on-stream quite soon. However, the coming year or two is likely to witness an influx of new companies invading the global omega-3 market, provided they obtain the USFDA's or other relevant authorities' approvals.

In a global scenario where increasing attention is being directed towards issues of sustainability and limited food supplies, algal sources offer immense scope for the rapidly expanding omega-3 market to continue in the same vein. The focus on obtaining EPA and DHA from algae was prompted by an endeavor to seek out more sustainable sources, since EPA and DHA are naturally contained in algae. Moreover, the omega-3 content in fish and krill originates from their consuming the algae directly or other creatures that feed on algae. In addition to being sustainable, algae also allows for farming that can be of help in putting up desirable labels, such as

“vegetarian,” “kosher” or even “organic.”

Expansion of market access and production capabilities of numerous players in the omega-3 space has been motivated through greater consumer awareness and demand for Omega-3 in triglyceride form. Research has established improved absorption and bioavailability of triglyceride omega-3 when compared to the ethyl ester form. Hence, manufacturers are presented with an unmatched opportunity to address the growing trend evolving from choosing omega-3 triglycerides over ethyl esters, specifically in ultrapure and highly concentrated forms.

On the other side of the coin, specifically in the United States, a negative July 2013 study on omega-3 which connected to prostate cancer risk has hampered the omega-3 market growth. United States omega-3 ingredient sales in second half of the year 2013 in dietary supplement sector has been significantly reduced compared to other application sectors. The impact is believed to be only in the US omega-3 market and there is little bit or no impact observed in Europe and Asia-Pacific regions. Omega-3 industry has been defending and will defend these negative studies in the future and omega-3 sales are expected to be growing as usual in the coming years.

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