

Global EPA and DHA Omega-3 Ingredients Market Growth 2026-2032

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Abstracts

The global EPA and DHA Omega-3 Ingredients market size is predicted to grow from US\$ 2357 million in 2025 to US\$ 3432 million in 2032; it is expected to grow at a CAGR of 5.8% from 2026 to 2032.

In 2025, global EPA and DHA Omega-3 Ingredients 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.

EPA and DHA Omega-3 Ingredients 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, EPA and DHA Omega-3 Ingredients 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 EPA and DHA Omega-3 Ingredients 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 EPA and DHA Omega-3 Ingredients 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.

LP Information, Inc. (LPI)'s newest research report, the "EPA and DHA Omega-3 Ingredients Industry Forecast" looks at past sales and reviews total world EPA and DHA Omega-3 Ingredients sales in 2025, providing a comprehensive analysis by region and market sector of projected EPA and DHA Omega-3 Ingredients sales for 2026 through 2032. With EPA and DHA Omega-3 Ingredients sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world EPA and DHA Omega-3 Ingredients industry.

This Insight Report provides a comprehensive analysis of the global EPA and DHA Omega-3 Ingredients landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on EPA and DHA Omega-3 Ingredients portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global EPA and DHA Omega-3 Ingredients market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for EPA and DHA Omega-3 Ingredients and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global EPA and DHA Omega-3 Ingredients.

This report presents a comprehensive overview, market shares, and growth opportunities of EPA and DHA Omega-3 Ingredients market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

EPA

DHA

Segmentation by Source:

Fish Oil EPA and DHA

Algae Oil EPA and DHA

Others

Segmentation by Grade:

Food Grade

Pharma Grade

Feed Grade

Segmentation by Application:

Dietary Supplements

Fortified Food and Beverages

Infant Formula

Pharmaceuticals

Pet Food

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global EPA and DHA Omega-3 Ingredients market?

What factors are driving EPA and DHA Omega-3 Ingredients market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do EPA and DHA Omega-3 Ingredients market opportunities vary by end market size?

How does EPA and DHA Omega-3 Ingredients break out by Type, by Application?

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