

Omega-3 Market by Type (DHA, EPA, and ALA), Application (Dietary Supplements, Functional Foods & Beverages, Pharmaceuticals, Infant Formula, and Pet Food & Feed), Source (Marine and Plant), and Region - Global Forecast to 2029

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Abstracts

The global market for omega-3 is estimated at USD 7.5 billion in 2024 and is projected to reach USD 14.1 billion by 2029, at a CAGR of 13.4% during the forecast period. Ongoing research and development endeavors focused on uncovering new health benefits and applications of Omega-3 fatty acids are driving innovation and expanding the market potential for Omega-3 products. Additionally, continuous advancements in Omega-3 product formulations and delivery methods, such as microencapsulation and nanoemulsions, are improving the bioavailability, taste, and stability of Omega-3 supplements, thus attracting a wider consumer base. Furthermore, with a growing aging population worldwide, there is a heightened emphasis on healthy aging and preventive healthcare, which is fueling demand for Omega-3 supplements recognized for their potential advantages in maintaining cognitive function and joint health. Collectively, these factors contribute to the ongoing growth of the Omega-3 market.

“Increase in focus on preventive healthcare and innovative production technologies fuel demand for omega-3 market.”

As healthcare systems increasingly emphasize preventive measures to tackle the burden of chronic diseases, there's a rising recognition of the importance of Omega-3 supplements. These supplements have garnered attention for their potential to support heart health, cognitive function, and joint health. With ongoing advancements in diagnostics and personalized medicine, early detection of health risks is becoming more feasible, allowing for targeted interventions that include Omega-3 supplementation. This

convergence of preventive healthcare strategies and personalized interventions is expected to fuel the growth of the Omega-3 market as individuals seek proactive approaches to manage their health and well-being.

Innovative production technologies play a vital role in the Omega-3 market by streamlining manufacturing processes, enhancing efficiency, and boosting productivity. This enables Omega-3 manufacturers to effectively address increasing consumer demand while optimizing resource utilization and lowering production costs. Moreover, these advanced methods ensure consistent quality and purity, meeting rigorous regulatory standards and consumer expectations. As a result, consumers develop trust in the reliability of Omega-3 products, leading to repeat purchases and brand loyalty. Overall, these technological advancements drive market growth by improving efficiency, quality, diversity of products, bioavailability, and sustainability. By adapting to evolving consumer demands and leveraging emerging opportunities in the health and wellness sector, manufacturers can expand their market presence and meet the needs of a broader consumer base.

“In 2023, EPA stood as the second-largest segment within the by type of omega-3 market. “

The Omega-3 market is witnessing an increasing demand for EPA (Eicosapentaenoic Acid) owing to its well-established health advantages, notably in cardiovascular health and inflammation management. As the EPA segment claims the second-largest portion of the Omega-3 market, its rising prominence emphasizes its significance in fulfilling consumer preferences for tailored health solutions. With a growing consumer inclination towards products offering specific health benefits, EPA-rich Omega-3 supplements are gaining momentum for their potential to enhance overall well-being and address diverse health needs.

“Within the source segment, plant source is expected to grow during the forecast period constantly.”

The depletion of fish stocks and the environmental repercussions of fish oil extraction are prompting consumers to seek more sustainable alternatives. Plant-based sources like algae, chia seeds, and flaxseeds offer environmentally friendly options for obtaining Omega-3 fatty acids. A growing number of individuals are embracing vegan or vegetarian lifestyles, and plant-derived Omega-3s align with their dietary preferences and ethical considerations regarding animal products. Manufacturers are continuously innovating within this sector, creating more potent and easily absorbable plant-based

Omega-3 products. Examples include oils derived from microalgae and chia seed extracts encapsulated for enhanced efficacy. Investors are acknowledging the potential of this market segment, leading to heightened research and development efforts, which in turn propel further growth.

“The omega-3 market in Europe is anticipated to maintain consistent growth throughout the forecast period.”

Europe's aging population, prone to age-related health issues such as cardiovascular disease and cognitive decline, is increasingly turning to Omega-3 fatty acids for potential health benefits. Regulatory bodies like the European Food Safety Authority (EFSA) have validated health claims associated with Omega-3 fatty acids, bolstering consumer confidence and facilitating marketing efforts for Omega-3 enriched products. For instance, according to the European Union (2020), the median age in the EU-27 is projected to rise by 4.5 years between 2019 and 2050, reaching 48.2 years.

The Break-up of Primaries:

By Company Type: Tier 1 – 30%, Tier 2 – 45%, Tier 3 – 25%

By Designation: CXOs – 25%, Managers – 50%, Executives – 25%

By Region: North America – 25%, Europe – 25%, APAC – 30%, South America – 10%, and RoW - 10%

Key players in this market include BASF SE (Germany), Cargill, Incorporated (US), DSM-Firmenich (Netherlands), Croda International Plc (UK), Orkla (Norway), Corbion (Netherlands), Pelagia AS (US), KD Pharma Group SA (Switzerland), GC Rieber (Norway), Cooke Aquaculture (Canada), AlgiSys Biosciences, Inc. (US), Golden Omega (Chile), Polaris (France), Nordic Naturals (US), and Now Foods (US).

Research Coverage:

The report segments the omega-3 market based on type, source, application, and region. In terms of insights, this report has focused on various levels of analyses—the competitive landscape, end-use analysis, and company profiles, which together comprise and discuss views on the emerging & high-growth segments of the omega-3 market, high-growth regions, countries, government initiatives, drivers, restraints, opportunities, and challenges. A detailed analysis of the key industry players has been

done to provide insights into their business overview, solutions, services, key strategies, contracts, partnerships, and agreements. New product launches, mergers and acquisitions, and recent developments associated with the omega-3 market. Competitive analysis of upcoming startups in the omega-3 market ecosystem is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall omega-3 market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities. The report provides insights on the following pointers:

Analysis of key drivers (Increase in application profiling and existing applications finding new markets, innovative production technologies, and consumer awareness regarding the health benefits of omega-3), restraints (lower fish oil supply due to sustainability issues among fisheries, and lack of clarity among consumers about daily recommended intake) opportunities (microencapsulation, awareness about certified food ingredients, research for development of alternative sources to obtain omega-3), and challenges (high cost involved in R&D activities, and highly unstable fish oil prices).

Product Development/Innovation: Detailed insights on research & development activities, and new product launches in the omega-3 market.

Market Development: Comprehensive information about lucrative markets – the report analyses the omega-3 market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the omega-3 market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like BASF SE (Germany), Cargill, Incorporated (US), DSM-Firmenich (Netherlands), Croda International Plc (UK), Orkla (Norway), Corbion (Netherlands), Pelagia AS (US), KD Pharma Group SA (Switzerland), GC Rieber (Norway), Cooke Aquaculture (Canada),

AlgiSys Biosciences, Inc. (US), Golden Omega (Chile), Polaris (France), Nordic Naturals (US), Now Foods (US), BTSA (Spain), Farbest Brands (US), KinOmega Biopharm Inc (China), Pharma Marine AS (Norway), Rimfrost AS (Norway), Algorithm (Canada), Solutex (Spain), Cellana Inc (US), Nature's Way Brands (US), and AlgaeCytes UK) among others in the omega-3 market.

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*Details on Business Overview, Products/Solutions/Services Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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About

This report defines and segments the "Omega-3 PUFA Market by Type (DHA, EPA, ALA), Source[Marine (Fish, Algal, Krill, Others), Plant (Flaxseed, Chia Seed, Others)], Application (Dietary supplement, Functional F&B, Pharma, Infant Formula, Others) & Geography - Global Trend & Forecast to 2019", with analyses and projections of the market size, in terms of value and volume.

The global Omega-3 PUFA market was valued at \$2105.0 Million in 2013 and is expected to reach \$4336.2 Million by 2019, at a CAGR of 12.8% from 2014 to 2019.

The Omega-3 PUFA market is projected to grow at a healthy CAGR of 12.8% between 2014 and 2019. Dietary supplements as an application garner the largest market share of 55%, followed by functional food & beverage and pharmaceuticals. As there is a growing demand amongst consumers for healthy ingredients fortified into food and beverage to prevent disease, the functional food & beverage sector is growing at a considerable rate. The pharmaceutical and infant formula category is also expected to exhibit a robust growth rate in the next five years. Eicosapentaenoic acid (EPA) and Docosahexaenoic acid (DHA) dominate the Omega- 3 PUFA market, by type, and fish oils are the largest and dominant sources as they are rich in EPA and DHA.

The Omega-3 PUFA market is expanding at a significant rate. North America is the largest market for Omega-3 PUFA, due to the demand for functional foods & beverages and technological advancements. In Europe, regulations favor the usage of Omega-3 PUFA in functional foods and infant formula and are expected to spur the demand in its developed markets.

The Asia-Pacific region has huge market potential for Omega-3 PUFA as consumer awareness about Omega-3 PUFA's preventive healthcare benefits has increased and there is a rising occurrence of cardiovascular disease. The presence of a favorable government regulatory environment for safer and healthy products further boosts the Asia-Pacific market.

The key players in the market are:

BASF (Germany)

DSM (The Netherlands)

Croda International PLC (U.K.)

Omega Protein Corp (U.S.)

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