

The Global Market for EPA/DHA Omega-3 Products

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Abstracts

Packaged Facts projects the market value of EPA/ DHA omega-3 packaged products to reach \$34.7 billion in 2016, representing a compound annual growth rate (CAGR) of 6.4% over 2011. Expanding public awareness of EPA/DHA omega-3 health benefit through positive media coverage of scientific research findings, as well as developments in regulatory markets, will contribute significantly to continued growth in the global market for EPA/DHA omega-3 products. Other factors that will continue to create a positive growth environment for EPA/DHA omega-3 products include:

Consumer interest in functional food and fortified product line expansions;

Increasing demand for fortified infant formula due to population growth and rising middle class in emerging economies;

Continued popularity of EPA/DHA omega-3 nutritional supplement products, including krill oil and vegetarian algae-based supplements;

Introduction of pharmaceutical-grade products into South America and approval of generic forms in existing markets;

Expanding clinical nutrition market opportunities for disease- and disorder-specific formula applications, created through additional R & D and aggressive marketing by ingredient suppliers;

Premiumization of pet foods due to humanization of companion animals.

This report, based on research commissioned by the Global Organization for EPA and DHA Omega-3 (GOED) and featured at the GOED Exchange 2012 conference in

Boston in June 2012, focuses on the market for EPA / DHA omega-3 packaged products by category and global region. The products included in this study are those fortified with eicosapentaenoic acid (EPA) or docosahexaenoic acid (DHA). Excluded from scope of this study are non-fortified fish/ fish products as well as products that only contain alpha linoleic acid (ALA) omega-3.

The geographic scope of this report is global, broken out into four regions: North America (United States and Canada); Europe (Scandinavia, Western Europe, Eastern Europe and Russia); Asia Pacific (China, Japan, South and Southeast Asia, Australia, New Zealand and Oceania); and Rest of World (Latin America, Middle East and Africa). Six categories of packaged consumer products are covered by this report: infant formula; fortified foods and beverages; nutritional supplements; pharmaceuticals; clinical nutrition (enteral and parenteral) products; and pet food, treats and supplements.

The base year for market sizing is 2011, with projections for 2016. All market size figures and projections are calculated in U.S. dollars.

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