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EPA and DHA - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 135 pages | Mordor Intelligence

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Report description:

The EPA and DHA Market size is estimated at USD 1.86 billion in 2024, and is expected to reach USD 2.57 billion by 2029, growing at a CAGR of 6.76% during the forecast period (2024-2029).

Globally, EPA and DHA have been gaining importance and are becoming a part of consumers' daily diets. The key reasons for this change are primarily the increased prevalence of lifestyle diseases and people taking preventive healthcare measures. Moreover, the emerging applications of EPA and DHA in food, dietary supplements, and clinical nutrition have further stimulated the market's growth. New sources of EPA and DHA have been gaining prominence recently. Microalgae, a source rich in omega-3 and beta-carotene, has gained immense popularity among manufacturers as a sustainable source of food and fuel.

Algae omega ingredients are key in driving the overall market due to the growing demand for algae omega in infant food fortification. They provide benefits similar to fish oil but have no off-putting odor or taste. Also, omega ingredients obtained from algae are considered more bioavailable and sustainable for production. Moreover, there has been a shift in consumer demand for dietary supplement sources in countries and regions like the United States, China, and Europe.

The consumers of supplements have been shifting away from refined anchovy oils and inclining toward omega ingredients of higher concentration. There are plenty of reasons why consumers reach for omega-3 concentrates, including the ease of delivery that the concentrates offer. Smaller capsules and soft gel sizes can deliver a dose of high concentrated omega-3, which consumers highly appreciate. This has been accelerating sales for the global omega ingredients market.

EPA & DHA Market Trends

Increasing Application of Docosahexaenoic Acid (DHA)

The DHA segment is driven by its growing demand and incorporation in infant formulae and nutritional products targeting children's health. It is an essential building block for the growth and maturation of an infant's brain and retina. It is mostly obtained from fish and algae oils. Additionally, it is extensively used in fortified foods and dietary supplements. It is mainly used for treating Type 2 diabetes, coronary artery disease (CAD), dementia, and attention deficit hyperactivity disorder (ADHD). The healthy aging-related benefits of DHA have also led to its successful utilization in geriatric nutrition products.

Furthermore, an increasing number of product launches worldwide favors the industry's growth. Additionally, the sector is growing due to increasing product launches worldwide. Global firms, such as Polaris, seek to improve their product offerings in the fish-free omega 3. As a result, it introduced Omegavie DHA 800 microalgae oil in June 2021, guaranteeing at least 800 mg/g of DHA. The ingredient is non-GMO, allergen-free, and guaranteed to be toxin-free, making it safe for vegetarians and vegans. As a result, all the current consumer demand is being targeted.

Asia-Pacific Holds a Significant Share in the EPA and DHA Market

Asia-Pacific has been leading the market studied, owing to the high consolidated production and consumption in countries like China and Japan. Consumers in this region tend to source omega-3 majorly from fish-rich diets rather than algae-based products. Thus, food manufacturers do not find it worth increasing the production cost by incorporating expensive algal omega-3 ingredients to replace fish-extracted ingredients. Moreover, to cater to the demand for DHA and EPA ingredients in India, in September 2021, the Indian Food Safety Authority gave Evonik clearance to import and distribute AvailOm in India to accelerate the roll-out of its omega-3 solution.

There has also been a growing demand among children to fulfill their key nutritional requirements due to the increasing awareness about the crucial role of EPA and DHA on brain development and other vital functions. To cater to the demand, major market players are introducing new product innovations to maintain the necessary nutritional intake of the young ones. For instance, in October 2021, Danone India, with its mission 'to bring health through food,' launched fortified beverages AptaGrow for children. AptaGrow includes prebiotics and DHA for the physical and cognitive development of children.

EPA & DHA Industry Overview

The EPA and DHA market is moderately concentrated by a few players, such as BASF SE, Croda International PLC, and Koninklijke DSM NV. Many small companies started commercial production of EPA and DHA and were acquired by larger players as a competitive strategy. They are also focussing on investment in R&D to compete in the growing market. Moreover, various global companies have become active in the EPA and DHA market during the last few years with tactical acquisitions, mergers, and partnerships.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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