

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

Market Report | 2025-06-11 | 405 pages | Industry Experts

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### **Report description:**

Global Omega-3 Polyunsaturated Fatty Acids (PUFAs) Market Trends and Outlook

Omega-3 Polyunsaturated Fatty Acids (PUFAs) are widely recognized for their considerable health benefits. They play a crucial role in promoting cardiovascular health and are also associated with protective effects against a variety of health conditions, including cancer, birth defects, diabetes, arthritis, cognitive decline, depression, and several others. These essential fatty acids are not produced by the body in sufficient quantities and must be obtained through diet or supplements. Historically, fish oils have been the primary source for extracting Omega-3 fatty acids, particularly the long-chain varieties like EPA (eicosapentaenoic acid) and DHA (docosahexaenoic acid). However, in recent years, attention has increasingly turned toward alternative sources such as krill oil, squid oil, and oils derived from microalgae. Among these, microalgae have emerged as a particularly promising and sustainable source.

The global Omega-3 PUFA ingredients market faced a tumultuous year in 2023. The market experienced pronounced volatility, largely due to significant disruptions in supply and mounting economic challenges. One of the key contributing factors was a marked decline in fish oil production, especially in Peru, which is among the world's leading suppliers. This decline was brought on by a combination of environmental and regulatory factors. The El Nino phenomenon caused shifts in ocean temperatures and altered fish migration patterns, which resulted in lower fish populations. In response, the Peruvian government not only canceled a fishing season but also imposed reduced quotas for allowable catch. These developments, coupled with broader issues such as disruptions in global supply chains, shortages of raw materials, and escalating transportation costs, severely curtailed the availability of Omega-3 ingredients and triggered a significant rise in prices.

Moving into 2024, market conditions began to stabilize. There was an improvement in fishing quotas and a recovery in fish oil production, particularly in regions affected during the previous year. These developments helped to normalize both supply and pricing levels across the market. As a result, global Omega-3 demand registered a growth of 3.8%. However, with prices softening from the elevated levels of 2023, the market's overall value declined by 9.7%, settling at US\$2.23 billion. Continued interest in the health benefits of Omega-3s, combined with increasing consumer awareness and innovation in sourcing and product formulation, is expected to support ongoing growth. By the year 2030, global Omega-3 PUFAs demand is projected to reach US\$2.54 billion with a compound annual growth rate (CAGR) of 2.4% over the forecast period spanning 2024 to 2030.

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## Omega-3 Polyunsaturated Fatty Acids (PUFAs) Regional Market Analysis

The report reviews, analyzes and projects the Omega-3 PUFAs market for global and the regional markets including North America, Europe, Asia-Pacific, South America and Rest of World for the period 2021-2030 in terms of volume (metric tons) as well as value (USD). Asia-Pacific region leads the global Omega-3 PUFAs volume market with a share of 41.7% in 2024 and is further projected to record the world fastest CAGR of 5.5% during 2024-2030 to reach 91 thousand metric tons by 2030. In terms of value, North America and Asia-Pacific led the global market with shares of 33.5% and 33.2% respectively in 2024. However, demand for Omega-3 PUFAs in North America is projected to sustain the slowest CAGR of 2.2% during the similar period.

## Omega-3 Polyunsaturated Fatty Acids (PUFAs) Market Analysis by Raw Material Source

Omega-3 Polyunsaturated Fatty Acid (PUFAs) ingredients analyzed in this study include Omega-3 EPA and DHA from marine sources including fish oils, krill oils and squid oils; and algal sources. Marine oils constitute the largest raw material source for Omega-3 PUFAs globally, cornering a volume share estimated at 95% in 2024, valued at US\$1.8 billion. However, algal oils are likely to emerge as the faster growing source for Omega-3 PUFAs, reaching a projected US\$531.5 million in 2030 by registering a CAGR of 6.6% between 2024 and 2030.

## Omega-3 Polyunsaturated Fatty Acids (PUFAs) Market Analysis by End-use Application

End use applications of Omega-3 PUFAs covered in this report include dietary supplements, food & beverages, animal nutrition including aqua feed and pet food, infant nutrition, pharmaceuticals and clinical nutrition. In terms of volume, dietary supplements and animal nutrition are the two largest applications for Omega-3s globally cornering shares of 57% and 22.2% respectively in 2024. Dietary supplements again lead the value market for Omega-3 globally with US\$777 million, followed by infant nutrition and pharmaceuticals in 2024. Demand for Omega-3 PUFAs in the global infant nutrition sector is projected to post the fastest 2024-2030 CAGR of 6.3% in terms of volume, reaching 20 thousand metric tons by 2030.

## Omega-3 Polyunsaturated Fatty Acids (PUFAs) Market Report Scope

This global report on Omega-3 Polyunsaturated Fatty Acids (PUFAs) analyzes the global and regional markets for types (based on raw material source) and end-use applications from 2021-2030 period with projections from 2024 to 2030 in terms of volume shipments in metric tons and value in US\$. In addition to providing profiles of major companies operating in this space, the latest corporate and industrial developments have been covered to offer a clear panorama of the industry.

### Key Metrics

Historical Period: 2021-2023

Base Year: 2024

Forecast Period: 2024-2030

Units: Volume consumption in Metric Tons and Value market in US\$

Companies Mentioned: 140+

## Global Omega-3 Polyunsaturated Fatty Acids (PUFAs) Market by Geographic Region

- [ ] North America (The United States, Canada and Mexico)

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

- [ ] Asia-Pacific (Australia/New Zealand, China, Japan, South Korea, India and Rest of Asia-Pacific)

- [ ] South America (Argentina, Brazil and Rest of South America)

- [ ] Rest of World

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## Global Omega-3 Polyunsaturated Fatty Acids (PUFAs) Market by Type (based on Raw Material Source)

- Marine Oil Sourced Omega-3 PUFAs (EPA and DHA containing Fish Oils, Krill Oils and Squid Oils)
- Algal Oil Sourced Omega-3 PUFAs

## Global Omega-3 Polyunsaturated Fatty Acids (PUFAs) Market by End-use Application

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    - Cognitive Decline
    - Skin Disorders
    - Inflammatory Bowel Disease (IBD)
    - Asthma

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- Aker Biomarine AA
- Archer Daniels Midland Company
- Austral Group S.A.A.
- Axplora Group GmbH
- BASF SE
- Berg Lipidtech AS (BLT)
- Cellana LLC
- Chemport, Inc.
- Croda International Plc
- DSM-Firmenich AG
- Epax AS
- Evonik Industries AG
- GC Rieber VivoMega AS
- Golden Omega SA
- Guangdong Runke Bioengineering Co Ltd
- Huatai Biopharm Inc.
- jiangsu Auqi Marine Biotechnology Co., Ltd.
- KD Pharma Group SA
- LYSI hf.
- Nippon Suisan Kaisha, Ltd. (NISSUI)
- OLVEA Omega Solutions (Olvea Group)

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- Omega Protein Corporation
- Orkla ASA
- POLARIS
- Qualitas Health Inc. dba iwi
- Seven Seas Ltd
- Sinomega Biotech Engineering Co Ltd
- Solutex GC, S.L.
- Stepan Company
- Tasa Omega SA
- Thai Union Group PCL
- Wiley Companies

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o Archer Daniels Midland Company (United States)

o ArcticSource1 LLC (United States)

o Arizona Algae Products, LLC (United States)

o Bering Select LLC (United States)

o Bioriginal (Canada)

o CAS BioSciences, LLC (United States)

o Cellana LLC (United States)

o Corbion, Inc. (United States)

o GCI Nutrients, Inc. (United States)

o Helios Corp (United States)

o Mara Renewables Corporation (Canada)

o Algorithm Ingredients, Inc. (Canada)

o Nordic Naturals, Inc. (United States)

o Novotech Nutraceuticals, Inc. (United States)

o Omega Protein Corporation (United States)

o Originates Inc. (United States)

o Pure Alaska Omega (United States)

o Qualitas Health Inc. dba iwi (UNITED STATES)

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- o Rimfrost AS (Norway)
- o Solarvest Bioenergy Inc. (Canada)
- o Source-Omega LLC (United States)
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  - o Axlora Group GmbH (Germany)
  - o BASF SE (Germany)
  - o Berg Lipidtech AS (BLT) (Norway)
  - o Bluebiotech International GmbH (Germany)
  - o Brudy Technology S.L. (Spain)
  - o Carniolus d.o.o. (Slovenia)
  - o Copalis (France)
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  - o De Wit Speciality Oils (Netherlands)
  - o Denomega (Orkla Health) (Norway)
  - o DSM-Firmenich AG (Switzerland)
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  - o Fortuna Oils AS (Norway)
  - o GC Rieber Oils (Norway)
  - o Grontvedt Biotech (Norway)
  - o Henry Lamotte Oils GmbH (Germany)
  - o Hofseth Biocare AS (Norway)
  - o Huve Nutraceutical Ltd (Bulgaria)
  - o Impact Ingredients BV (Netherlands)
  - o Imperial-Oel-Import Handelsgesellschaft mbh (Germany)
  - o IQI B.V. (Netherlands)

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- o KD Pharma Group SA (Switzerland)
- o Kerry Group plc (Ireland)
- o LYSI hf. (Iceland)
- o Margildi EHF. (Iceland)
- o Minami Nutrition (Belgium)
- o Mowi ASA (NORWAY)
- o Natac Natural Ingredients S.L.U. - Innovaoleo (Spain)
- o Noble Harvest AS (Norway)
- o Norwegian Fish Oil AS (Norway)
- o Nutriswiss AG (Switzerland)
- o OLVEA Omega Solutions (OLVEA Group) (France)
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- o Pharma Marine AS (Norway)
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- o SEANOVA (France)
- o Seven Seas Ltd (United Kingdom)
- o Simris Alg AB (Sweden)
- o Sochim International Spa (Italy)
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- o Thai Union Marine Nutrients GmbH (Germany)
- o Triplenine Group A/S (Denmark)
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  - o Arjuna Natural Pvt Ltd (India)
  - o ATK Biotech Co., Ltd. (China)
  - o Avesthagen Limited (India)
  - o BioPlus life Sciences Pvt. Ltd. (India)

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- o Bizen Chemical Co Ltd (Japan)
- o Blueline Foods (India) Pvt Ltd (India)
- o CABIO Biotech (Wuhan) Co., Ltd. (China)
- o Camlin Fine Sciences, Ltd. (India)
- o Chambio Co., Ltd. (Taiwan)
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- o Fenchem Biotek Ltd (China)
- o Fujian High Fortune Bio-Tech Corp. (China)
- o Guangdong Runke Bioengineering Co Ltd (China)
- o Huatai Biopharm Inc. (China)
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- o Nisshin Pharma Inc. (Japan)
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- o Phycoil Biotech Korea, Inc. (South Korea)
- o Qingdao AlgaeNutra Biotech Co., Ltd (China)
- o Qponics Limited (Australia)
- o Seadragon Marine Oils Ltd (New Zealand)
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- Major Market Players
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  - o Austral Group S.A.A. (Peru)
  - o Colpex International S.A.C (Peru)
  - o Corporacion Pesquera Inca S.A.C. (Peru)
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  - o Naturmega SA (Colombia)
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