

North America Lipid - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

North America Lipid Market Analysis

The North American lipid market is expected to grow from USD 2.61 billion in 2025 to USD 3.36 billion by 2030, at a compound annual growth rate (CAGR) of 5.17%. The market expansion is driven by increased lipid usage across various industries. Growth is supported by advancements in lipid applications, changing consumer preferences, improvements in lipid delivery systems, and supportive regulatory frameworks for health-focused product development. Consumer awareness of functional lipids' health benefits, including omega-3 fatty acids, medium-chain triglycerides (MCTs), phytosterols, and phospholipids, contributes significantly to market growth. The market is also experiencing increased adoption of plant-based and algae-derived lipid sources, aligned with sustainability initiatives and clean-label demands.

North America Lipid Market Trends and Insights

Rising Popularity of Fortified Functional Foods and Beverages

The North American lipid market is experiencing growth due to increased demand for functional foods and beverages that contain health-promoting lipids. Consumers in the United States and Canada are becoming increasingly health-conscious, leading to a greater consumption of foods and beverages that offer specific health benefits, including improved heart health, enhanced cognitive performance, effective weight management, and anti-inflammatory properties. The Food and Drug Administration (FDA)'s new "healthy" food definition, effective February 2025, provides opportunities for lipid-fortified products by allowing higher

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levels of healthy fats while maintaining limits on added sugars and sodium . This regulatory change is expected to affect formulation strategies in the functional food industry. Moreover, Health Canada's approval of vitamin D fortification in yogurt and kefir responds to the needs of 19% of Canadians with vitamin D deficiency, demonstrating regulatory support for nutrition enhancement.

Expanding Adoption of Omega-3 and Functional Lipids in Dietary Supplements and Nutraceuticals

The North American lipid market is experiencing significant growth due to increased adoption of omega-3 and other functional lipids in dietary supplements and nutraceuticals. This expansion stems from consumers' growing health awareness and their search for preventive solutions to manage chronic conditions, including cardiovascular disease, cognitive decline, metabolic disorders, and inflammatory conditions. Manufacturers are incorporating various functional lipids - omega-3 fatty acids (EPA and DHA), medium-chain triglycerides (MCTs), phytosterols, and conjugated linoleic acid (CLA) - into nutraceutical products for their proven benefits in brain function support, cholesterol reduction, weight management, and energy metabolism enhancement. According to the Council for Responsible Nutrition (CRN), 74% of United States adults used dietary supplements in 2023 . In response to this demand, manufacturers offer diverse lipid-based delivery formats, including softgels, gummies, powders, and emulsified liquids, targeting specific life stages and health needs such as prenatal care, aging, sports performance, and immune support.

Volatility in Raw Material Prices

The vegetable oil market is experiencing significant changes as soy oil gains prominence due to palm oil reaching near-record price premiums. This shift creates price volatility that affects lipid manufacturers' cost structures and margin predictability. In North America, supply chain dynamics are shifting after the United States Customs and Border Protection ruled that Norwegian-origin omega-3-acid ethyl esters encapsulated in China do not qualify as substantially transformed products. The industry is adopting nutrient FIFO (nFIFO) measurements to track omega-3 retention from wild fish to final products, supporting improved byproduct utilization and sustainability, though this may affect pricing structures. Archer Daniels Midland Company has implemented sustainability measures, achieving a 14.7% reduction in Scope 1+2 greenhouse gas emissions and expanding regenerative agriculture programs to 2.8 million acres, reflecting the industry's environmental commitment while managing associated costs.

Other drivers and restraints analyzed in the detailed report include:

Widening Use of MCTs in Weight Management Diets / Growing Demand for Plant-Based and Algae-Derived Lipids / Stringent Purity and Safety Regulations /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Omega-3 fatty acids hold a 43.18% market share in 2024, maintaining their dominant position through established applications in cardiovascular health and cognitive function. Medium-chain triglycerides (MCTs) represent the fastest-growing segment with a 6.78% CAGR through 2030, driven by increasing demand in weight management and ketogenic diet applications. The omega-3 segment receives regulatory support, as the Food and Drug Administration (FDA)'s review of infant formula nutrient requirements may expand DHA and EPA requirements in early nutrition applications. Phospholipids and glycolipids find specialized uses in pharmaceutical drug delivery systems, where liposomal technology improves therapeutic efficacy through targeted delivery mechanisms.

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MCTs offer distinct metabolic benefits through quick absorption and energy conversion, with clinical studies demonstrating notable weight reduction effects compared to long-chain triglycerides, especially in patients with metabolic disorders. The omega-3 segment faces supply constraints from limited marine sources. The "Others" category includes emerging lipid developments, such as structured lipids and specialty fatty acid derivatives used in industrial applications.

Plant-based sources hold a 55.31% market share in 2024 and are projected to grow at a 7.34% CAGR through 2030. This dominance stems from increasing consumer demand for sustainable and ethical lipid sources, particularly as concerns rise about the environmental impacts of marine harvesting. Marine-based sources experience sustainability challenges and supply limitations, while animal-based sources remain focused on specialized nutrition and pharmaceutical applications.

Technological advancements support this transition to plant-based alternatives. Corbion's AlgaVia platform employs microalgae cultivation with minimal resource requirements and renewable energy, providing traceable omega-3 sources for aquaculture applications. Marine sources maintain their position in premium applications requiring specific fatty acid profiles, despite supply chain instability. In agricultural innovation, Yield10 Bioscience has received USDA approval for genetically modified Camelina crops that produce 10% EPA and 10% DHA, demonstrating progress in plant-based omega-3 production.

The North America Lipid Market is Segmented by Product Type (Omega-3, Medium-Chain Triglycerides (MCTs), and More), by Source (Marine-Based, Plant-Based, and More), by Form (Powder, and Liquid), by Application (Functional Food and Beverages, Infant Nutrition, Pharmaceuticals, and More), and by Geography (United States, Canada, Mexico, and Rest of North America). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Cargill Incorporated / BASF SE / Kerry Group plc / Croda International Plc / Bunge Ltd. / KD Pharma Group SA / Merck KGaA / Solutex GC, S.L. / Epax Norway AS / GC Rieber Oils AS / Archer Daniels Midland Company / Golden Omega S.A. / Omega Protein Corporation / Plant Lipids Pvt Ltd / Aker BioMarine ASA / Lonza Group Ltd. / Nissui Corporation / Associated British Foods / Lonza Group / Stepan Company /

Additional Benefits:

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

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