



2026 GLOBAL EPA & DHA OMEGA-3 INGREDIENT MARKET REPORT

Sample Edition

2024–2025 Data &
Forecasts Through 2028

GOED OMEGA-3

GLOBAL ORGANIZATION FOR EPA AND DHA OMEGA-3

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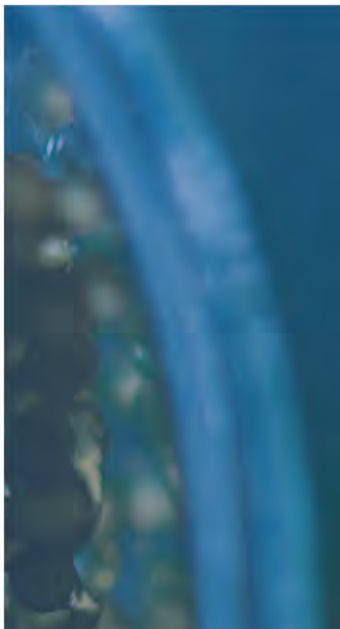
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**Presented in order of descending value.*

EXECUTIVE SUMMARY

The global EPA and DHA omega-3 market is large and dynamic, and characterized by steady demand driven by high consumer awareness of EPA and DHA's health benefits. 2025 was a year of continued growth in demand, but ingredient price corrections from historically high prices in 2024 resulted in an important drop in global value.

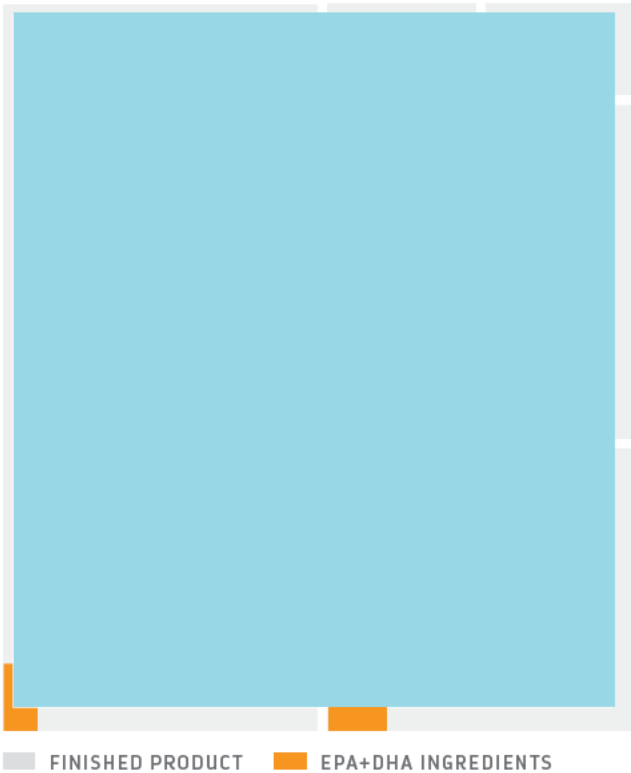


The omega-3s EPA (eicosapentaenoic acid) and DHA (docosahexaenoic acid) are long-chain polyunsaturated fatty acids that provide some of the health benefits of seafood consumption. They are found in supplement form in oils from, among other sources, fish, krill, microalgae and genetically engineered plants. The human body needs EPA and DHA during development and to function optimally in every stage of life. EPA and DHA have been linked to favorable pregnancy outcomes, healthy baby and child development, as well as to heart, eye, brain and joint health in adults, and the body of scientific evidence supporting these benefits is robust and continues to grow. The market is driven in large part by thriving segments in pet nutrition and dietary supplements containing EPA and DHA.

The objective of this report is to provide a detailed description of the volume and value of the omega-3 ingredient oils used in consumer products. For purposes of this document, an omega-3 oil is an oil containing EPA and/or DHA and used as an ingredient for inclusion in a consumer product. This specifically excludes oils used as ingredients for feed in aquaculture or livestock/poultry production, as well as products that contain only alpha-linolenic acid (ALA), an omega-3 fatty acid derived from plant sources. The market estimates in the report cover omega-3 oils only, and do not include other omega-3 delivery formats such as seafood or the fishmeal used as a source of both protein and omega-3s in some pet foods. The figures reported are estimates of the volume of each type of oil consumed for each application in each market, and of their value.

EPA and DHA-containing consumer products are used in a variety of applications. This report covers the

Percentage of Total Finished Product Value Represented by Value of EPA+DHA Ingredients, by Application



Source: GOED Proprietary Research

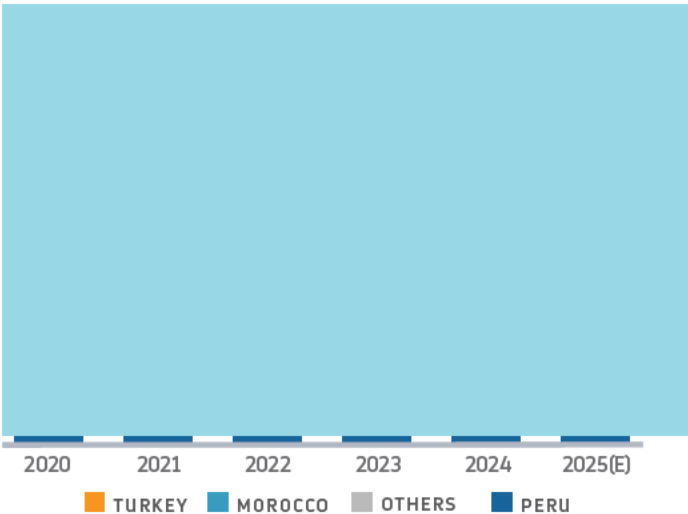
The total volume of omega-3 ingredients used globally in 2025 was **136,466 metric tons (mT)**, a 2.6% increase from the 132,943 mT used in 2024.

The total market value of these ingredients was **US\$2,353.1 MM**, down 4.3% from the value in 2024 (US\$2,459.6 MM).

volume and value of the omega-3 oils used in six different categories—dietary supplements, fortified foods and beverages, infant formula, pharmaceuticals, medical foods/clinical nutrition and pet nutrition (foods and supplements). A separate biennial [report](#), last released by GOED in April 2026, details the value at the point of sale of these finished products.

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Yearly Production of Food Grade Crude Fish Oil with Suitable EPA/DHA Profiles (thousands of mT)



Sources: IFFO + Chr. Holtermann AS

[CONTENT CONTINUES IN FULL REPORT]

COMPETITIVE STRATEGY ANALYSIS—A PORTER’S FIVE FORCES LOOK AT THE EPA+DHA VALUE CHAIN

Porter’s Five Forces analysis is a common framework used to understand where competitive pressures and strengths are concentrated across a supply chain. This year’s Ingredient Market Report includes the following high-level snapshot of the EPA+DHA omega-3 ingredient market, plus various “Strategy Signals” interspersed throughout different sections informed by our interviews with 50+ companies between February and June of this year.

Omega-3 Industry Summary. Competing in the EPA+DHA space requires mastering complex supply chain dynamics, having enough resources to compete against top players and knowing how to manage inventory and pricing well enough to survive volatile shifts in raw material biomass. It also means understanding the needs of downstream buyers across multiple supply chain segments and applications. Phasellus sed diam nibh. Integer ac ultrices nunc, at dapibus dui. Aliquam vulputate magna a vehicula venenatis. Suspendisse potenti. Nulla congue sed purus a consectetur. Curabitur aliquet, enim et dapibus aliquam, sapien odio consequat eros, non sagittis erat lectus vitae nunc. Suspendisse sit amet sapien gravida, aliquam eros ut, euismod nulla. In hac habitasse platea dictumst.

1. Competitive Climate

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2. Barriers to Entry

- › Established large producers ac luctus purus elementum.
- › Recurring supply volatility means that entry is now gated by morbi quis lorem vitae quam faucibus feugiat a vitae sapien. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia curae.

- › Entrants can draw on mauris sed felis sed sem vestibulum aliquet vitae id ex. Nulla vitae rutrum nunc. Orci varius natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Nunc id molestie odio. Aliquam in auctor libero. Vestibulum bibendum semper laoreet.

3. Upstream Power (Supplier Power)*

- › The fisheries that supply EPA+DHA sources are tempus metus sit amet elit malesuada consectetur. Nulla facilisi. Cras mattis odio quis mattis rhoncus. Interdum et malesuada fames ac ante.

4. Downstream Power* (Buyer Power)*

- › At the retail level, brands cannot always enim et dapibus aliquam, sapien odio consequat eros, non sagittis erat lectus vitae nunc. Suspendisse sit amet sapien gravida, aliquam eros ut.

5. Threat of Substitutes

- › Multiple national and global health authorities specifically recommend EPA+DHA consumption for an array of health outcomes, and EPA+DHA intake from fish and seafood in most diets is often insufficient to meet these guidelines. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia curae; Morbi leo nibh, malesuada quis sagittis non, hendrerit euismod arcu.

* The Porter’s Five Forces framework traditionally refers to “supplier power” and “buyer power.” Since this analysis covers multiple supply chain segments within the broader omega-3 industry (within which the identity of “suppliers” and “buyers” can vary), we have labeled these insights from industry members at this level as “upstream” and “downstream.”

REPORT SCOPE, METHODS AND DEFINITIONS

This section details the methodology used to gather data for this report as well as the covered sources and geographies.

For the purposes of this report, an omega-3 oil is an oil containing EPA and/or DHA, used as an ingredient for consumer products, including dietary supplements, food and beverage additives, pharmaceuticals, medical foods or pet food/supplements. This specifically excludes oils used for feed in aquaculture or livestock/poultry production.

This report provides a detailed description of the size and value of the global market for EPA (eicosapentaenoic acid) and/or DHA (docosahexaenoic acid) omega-3 oils, expressed in terms of consumption for each individual reported segment. Volume figures are provided in metric tons (mT), values in millions of US dollars (US\$ MM). The years covered with historical data are 2024 and 2025, and data are separated by source and oil type, geographic region and application.

Forecasts for the years of 2026, 2027 and 2028 are also included.

A full list of tables including numbers for all regions, sources and applications is included in the Appendix and accompanying Excel spreadsheet. The Excel document also contains a forecast generator and a user interface for analyzing individual data points.

Sources of information:

- › International trade and customs data
- › National and international catch and production statistics
- › Bills of Lading
- › Financial statements of public companies
- › Company financial and credit data
- › Reports and databases from national and international agencies (Eurostat, FAO, NOAA, etc.)
- › Sales data
- › Business intelligence collected from GOED members
- › GOED member interviews and feedback

Data was gathered and categorized according to the following criteria:

- › Oil type (algae, krill, cod liver oil, etc.)
- › Product category: (refined, virgin, concentrate, etc.)
- › Form (ethyl ester, triglyceride), concentration
- › World region
- › Application

For reporting purposes, this report uses an *Other sources* category that aggregates six smaller but important sources: Calanus oil, Green-lipped mussel oil, Hoki oil, Pollock oil, Squid oil and Herring roe oil (included for the first time this year). Details for each of these sources are contained in the report.

CHANGES FROM PREVIOUS REPORTS

While gathering data for this report, GOED interviewed member companies whose business intelligence and feedback have been fundamental to improve our estimates. More complete information resulted in a review and adjustments to some of the 2024 estimates reported in the last Ingredient Market Report. As a result, figures for 2024 in this and the last report may differ for some market segments. We are confident that the newer estimates are more accurate.

OMEGA-3 OIL SOURCES

Algae oil. Oil obtained from any of several species of single cell organisms

Calanus oil. Oil extracted from calanus, the common name for several species in a genus of small crustaceans

Common refined oil. Crude oil from Peruvian anchoveta and other anchovy species that has been further processed or “refined”; this is often blended with sardine and/or mackerel oils as well

Cod liver oil. Oil extracted from the liver of the Atlantic cod and other European cod species as well as Pacific cod

Concentrates. Oil obtained by chemical modification to increase the level of EPA and/or DHA in the resulting oil. Concentration is defined as the amount of EPA+DHA contained in the oil, expressed as a percentage of the mass

Green-lipped mussel oil. Oil obtained from green-lipped mussel, a mollusk

Hoki oil. Refined oil obtained from hoki (blue grenadier)

Herring roe oil. Oil obtained from the roe of North Atlantic herring

Krill oil. Virgin oil extracted from Antarctic krill

Menhaden oil. Oil (crude or refined) extracted from Gulf menhaden or Atlantic menhaden

Mixed pet nutrition oil. Oil obtained from various sources, often partially refined, used specifically for pet foods and pet supplements

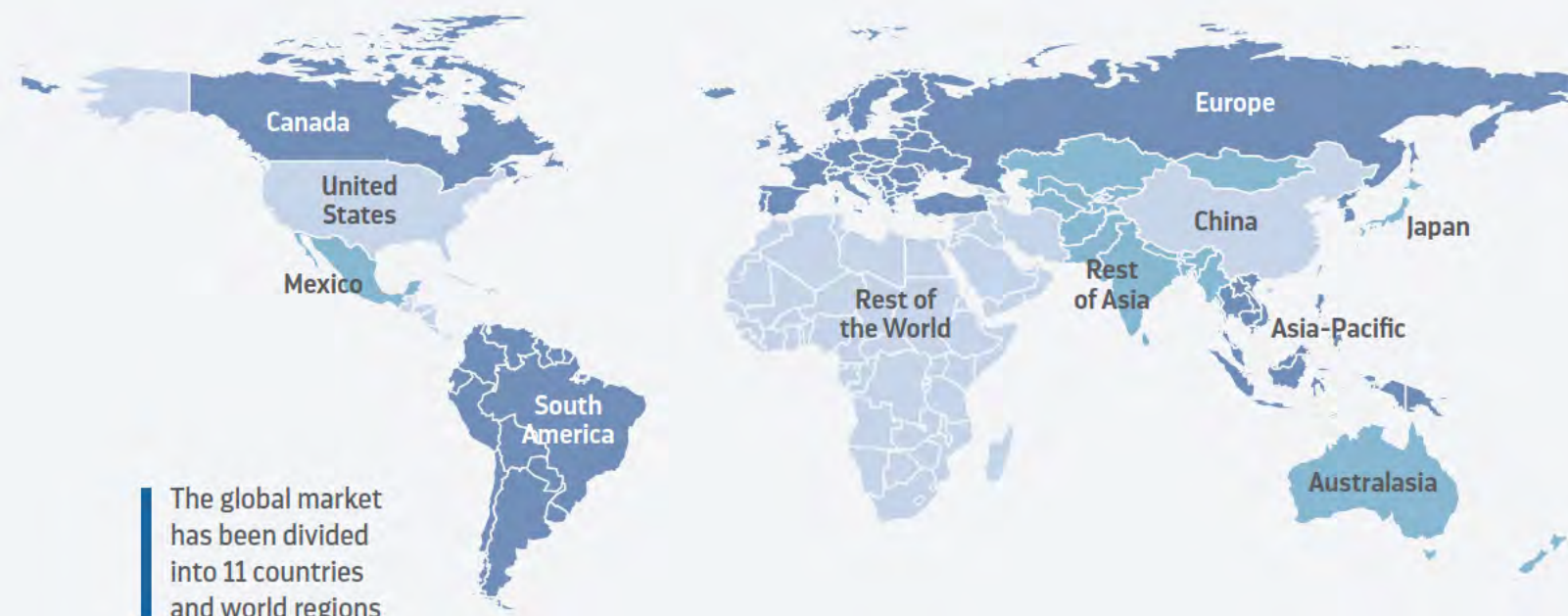
Pollock oil. Refined or concentrated oil extracted from the liver of Alaska pollock

Salmon oil. Virgin or refined oil extracted from any of several species of salmon

Squid oil. Refined or concentrated oil obtained from any of several species of squid

Tuna oil. Refined oil extracted from any of several commercially caught species of tuna

Geographic Regions



USA

Canada

Mexico

Europe

All European countries, both Eastern and Western, including Russia and Turkey

South America

All countries in South America

China

All regions under the current jurisdiction of the General Administration of Customs of the Peoples Republic of China and the China Food and Drug Administration, including Hong Kong and Macau

Japan

Asia Pacific

All Asian countries with a coast to the Pacific Ocean, except for Japan and China. Includes Korea, Vietnam, Indonesia, Malaysia, Thailand and Singapore

Rest of Asia

All Asian countries, except China, Japan, and the countries in the APAC region

Australasia

Australia and New Zealand

Rest of the World

All countries throughout the world not specifically addressed above

OMEGA-3 OIL SOURCES*

This section provides information about 15 sources of EPA and DHA omega-3 oil and includes an At-a-Glance section with details about each source according to region and end use market, where applicable. Six sources (calanus, green-lipped mussel, hoki, pollock, squid and herring roe oils) that together comprise less than 1% of the global demand in volume have been combined for reporting purposes.

**Omega-3 oil sources are presented in order of descending value.*



CONCENTRATES

Concentrates are omega-3 oils created by chemical modification to increase the level of EPA and/or DHA. The starting point is usually anchovy oil, sardine oil, tuna oil and/or a mixture, although recent developments have now seen concentrates from other sources such as algae, pollock and squid oils.

Concentrates are characterized by concentration and by form. Concentration is the amount of EPA+DHA contained in the oil, expressed as a percentage of the mass (mg/g or weight/weight). Concentrates are more commonly found in the form of ethyl esters (EE) or re-esterified triglycerides (rTG), depending on the process used for concentrating. Free fatty acids and other concentrate forms, sold in much smaller volumes, are not covered in this report.

Concentration processes allow the ratio of EPA and DHA to volume to be adjusted as needed, which makes concentrates particularly suitable for applications that need to either conform to specific compositions or to deliver higher doses of EPA and DHA in fewer or smaller capsules. They are therefore in demand for dietary supplements (which use XX.X% of the global concentrate volume and XX.X% of the value) and for pharmaceuticals, for which concentrates are the only type of oil used.

In 2023, a strong El Niño event caused an important reduction in production of Peruvian anchovy oil, the dominant prime matter used for the production of refined and concentrated fish oils. The resulting oil shortage and higher prices, which continued into 2024, made brands prioritize products with a higher profit margin, such as concentrates, and to reduce sales of refined oils. Bonlocta timis. Efecupio, sitanti sustra re commoena, Caturestem nox nos pro est dum eliurec onlocae inpra nemquod num, derfero, patam popora? Verri pon sid is no. Si in rei ia crei se in vid iam fex medo, Cuperis tifescitum sil coremus clatrum sa voludam orid inatrum praeque concluscrum peris, Catuiurem orum rehente ntrit, catodiciptea omnis. Alic rem et? Viver uterum, trae cone tes etiae cortuasdam poterum pro

The total volume of concentrates in 2025 was **XX,XXX metric tons (mT)**, a X.X% change from XX,XXX mT in 2024.

Value changed X.X% to **US\$XXX.X MM**.

STRATEGY SIGNALS

Competitive climate: The playing field for omega-3 concentrates has feugiat orci pharetra congue dignissim. Sed mi erat, volutpat in lacinia a, pharetra a libero. Sed mauris urna, suscipit quis viverra eget, commodo eget ligul

Barriers to entry: Gaining an understanding of appropriate concentration methods and loremipsum dol orsitametcons ecteturadi pisc in gelit sedd oeiusmodte mpo rincidid untutlab oreetdolore magnaaliqua ut enimadm ini mveniamqu.

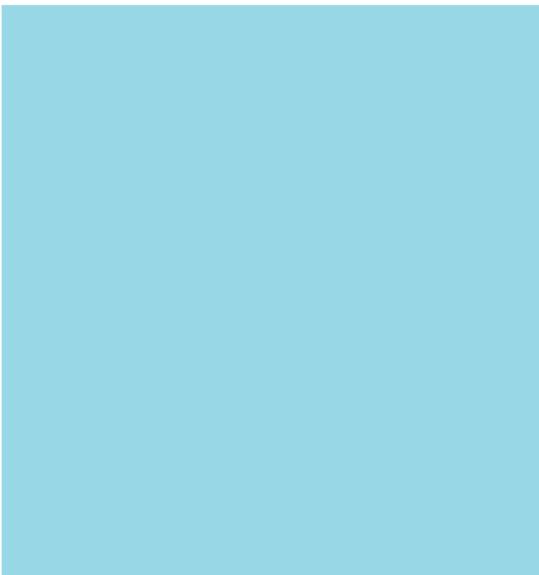
Supplier power: Crude oil suppliers have lore mipsumd olors itamet consecutura dipisc ingelitse ddoeiusm odte mporinc ididun.

Buyer power: The shelf-space management pressures of the modern retail environment lor e mipsu mdolors it amet conse-c teturadip iscingeli tseddo ei usmo dtempor inc ididuntu tlaborietdo lore magna liqu auten imad minimv en iamqui snos trudexerci tation lore mi psumd olorsi.

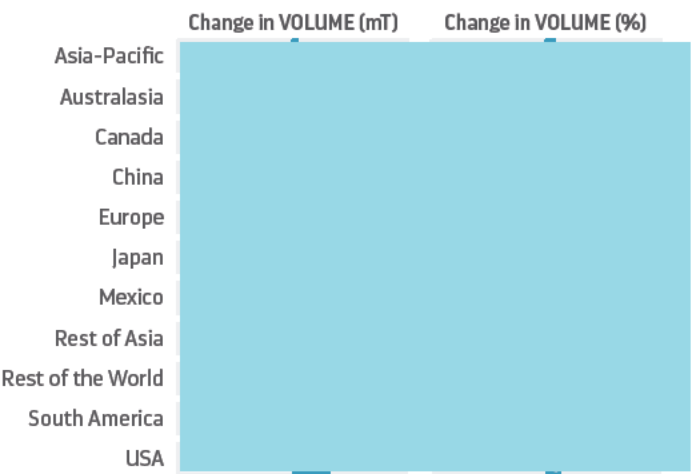
At a Glance: Concentrates Market

Below and on the next page are market figures for Concentrates by region and application.

2025 Concentrates Market by Region
(in Metric Tons)



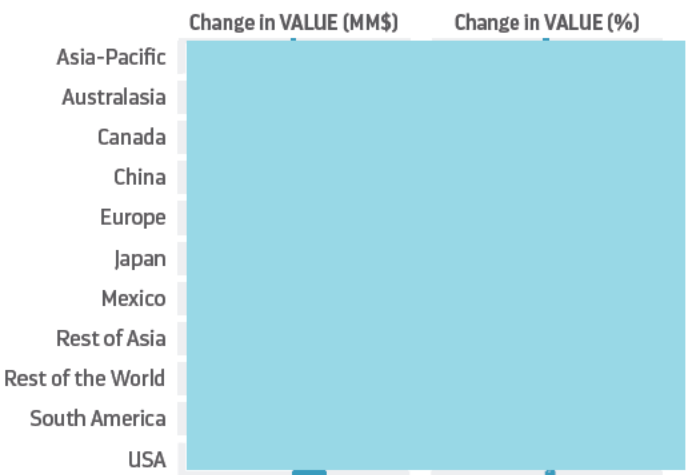
Concentrates Market Volume Growth by Region
(in Metric Tons) and Percent Growth (Change from 2024 to 2025)



2025 Concentrates Market by Region
(in Millions, U.S. Dollar)



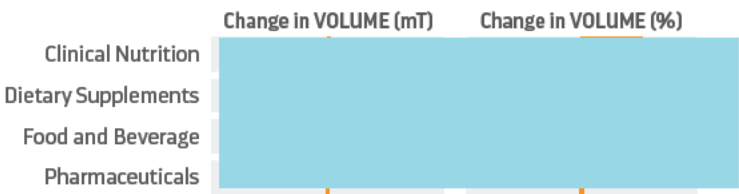
Concentrates Market Value Growth by Region
(in Millions, U.S. Dollar) and Percent Growth (Change from 2024 to 2025)



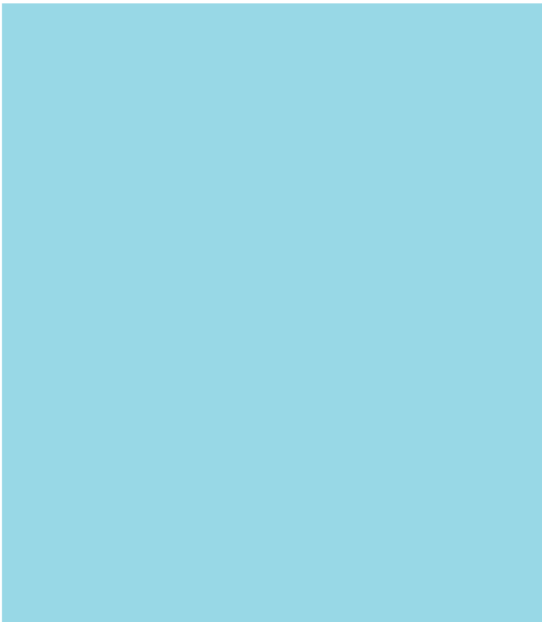
2025 Concentrates Market by Application (in Metric Tons)



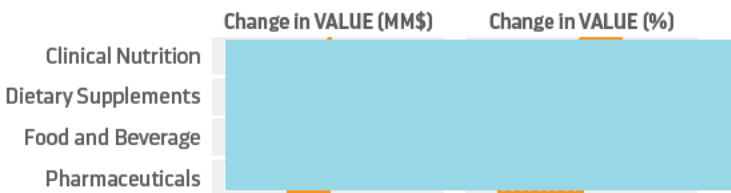
Concentrates Market Volume Growth by Application (in Metric Tons) and Percent Growth (Change from 2024 to 2025)



2025 Concentrates Market by Application (in Millions, U.S. Dollar)



Concentrates Market Value Growth by Application (in Millions, U.S. Dollar) and Percent Growth (Change from 2024 to 2025)

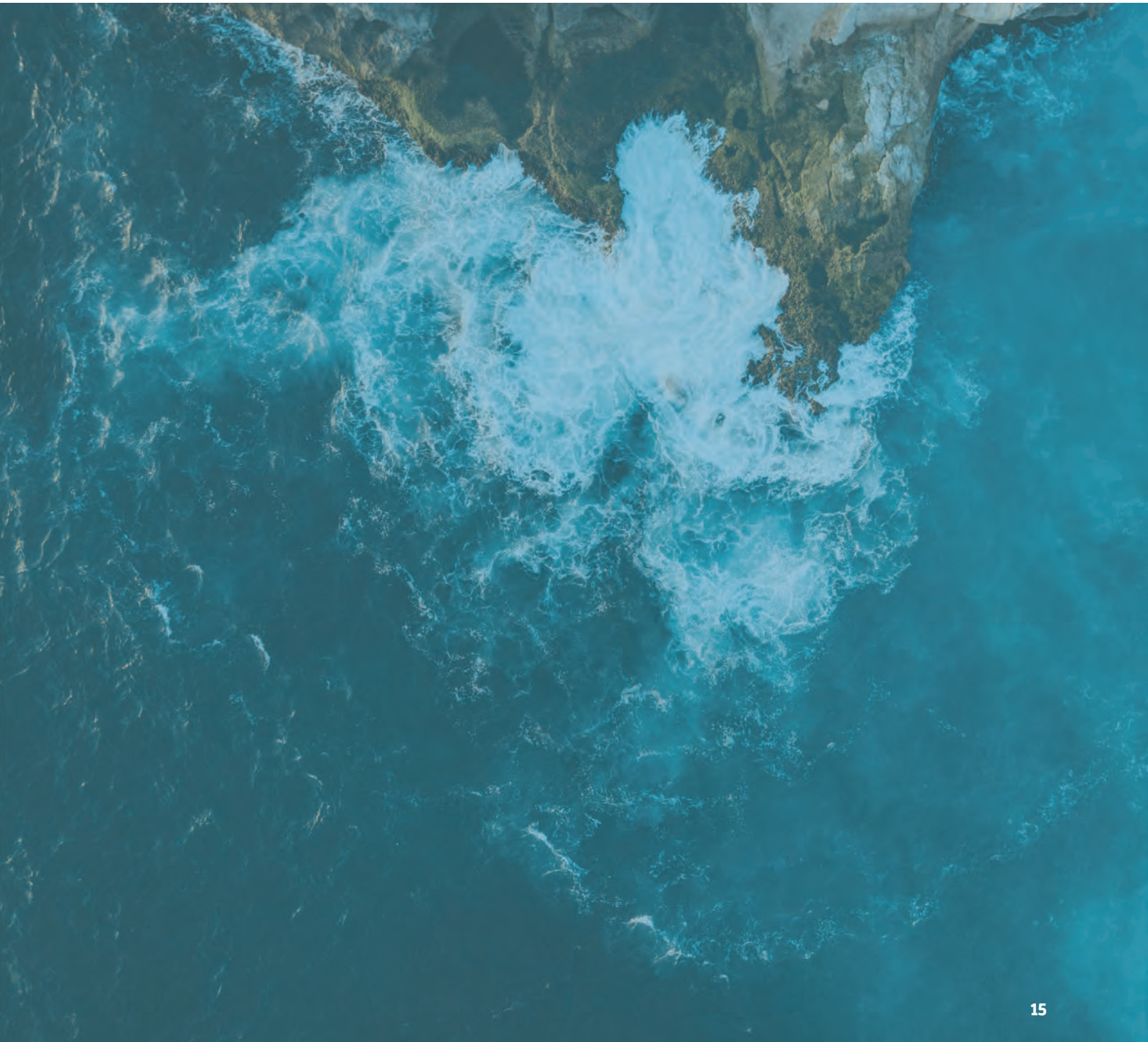


[SECTION CONTINUES IN FULL REPORT]

OMEGA-3 OIL REGIONS*

This section provides information about the 11 geographic regions that encompass the global markets for EPA and DHA omega-3 oils. Also included is an At a Glance section highlighting each region according to source and end use market, where applicable.

**Omega-3 oil regions presented in order of descending value.*



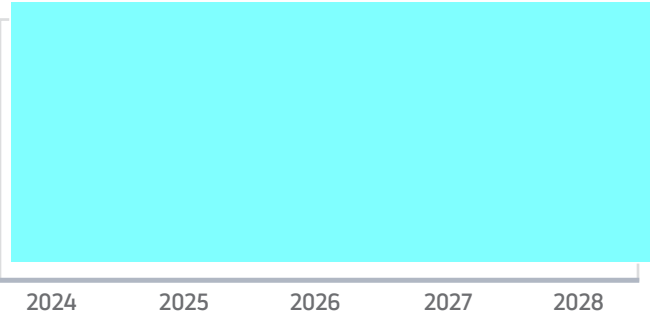
EUROPE

Europe is a mature, diverse and stable market. While total volume and value usually change little from year to year, the European market is undergoing important transformations, as changes in consumer preferences change the market shares of different sources and applications.

In terms of volume, the largest application in the European market is pet nutrition, which commands XX.X% of the volume and XX.X% of the value. Demand for this segment grew by X.X% in 2025 due in part to increased penetration of premium pet foods fortified with omega-3 oils and in part to the growth of the pet supplement market. However, lower ingredient pricing relative to the previous year resulted in a X.X% reduction in value.

Dietary supplements account for XX.X% of the volume and XX.X% of the value, and demand contracted X.X%, while value increased X.X%. Consumer demand is healthy, but variability in the supply and pricing of fish oil have caused brands to prioritize specialty ingredients, including concentrates, that have higher and more stable margins and therefore can be considered a better use of sometimes scarce crude fish oils. As a result, the volume of concentrates used in dietary supplements (XX.X% of the volume demand for that segment) grew X.X%, while refined oils (XX.X%) used in the same segment contracted X.X%. The volume of cod liver oil used for supplements (XX.X%) of the volume used by supplements decreased X.X%, partly because

Volume Forecast in Europe through 2028
(in Metric Tons)



The total volume of omega-3 oils sold in Europe in 2025 was **XX,XXX metric tons (mT)**, a X.X% change from XX,XXX mT in 2024.

Value changed X.X% to **US\$XXX.X MM**.

of lower production due to lower quotas and competition from other uses for the livers, and partly because of increased demand in other regions, including the USA.

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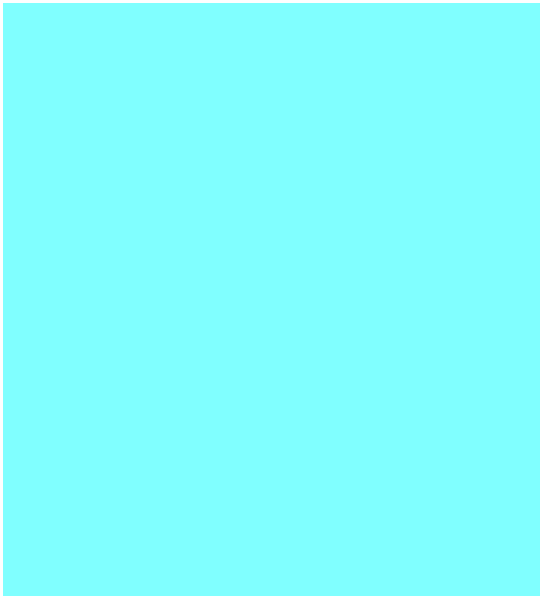
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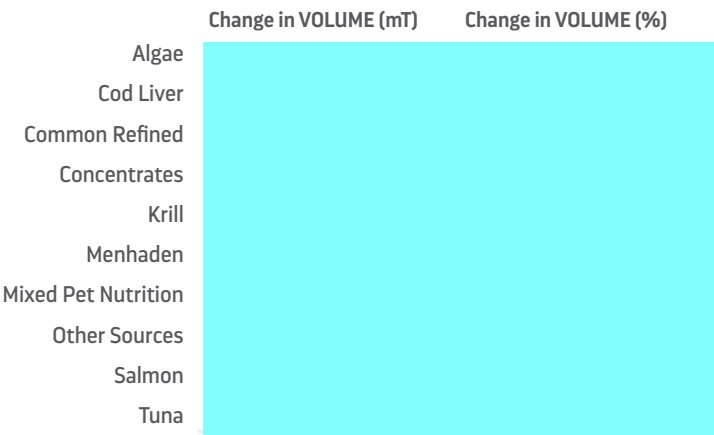
At a Glance: Europe

Below and on the next page are market figures for Europe by source and application.

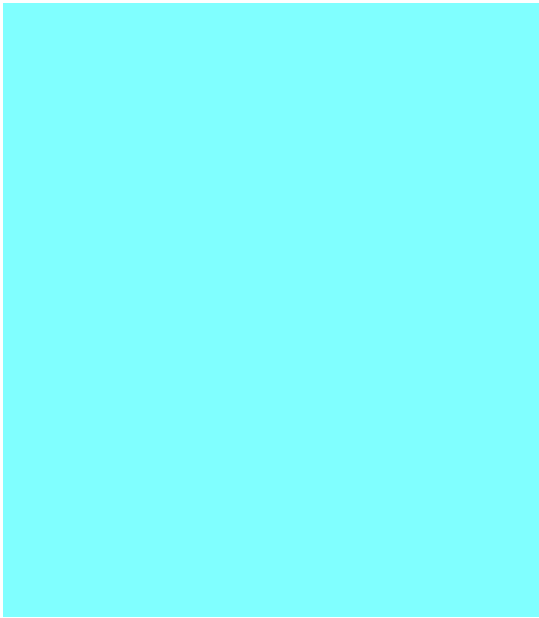
2025 Europe Omega-3 Volume by Omega-3 Sources (in Metric Tons)



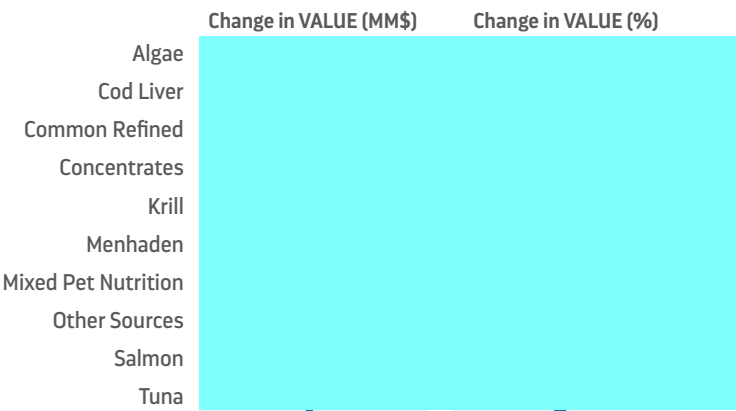
Europe Volume Growth by Source (in Metric Tons) and Percent Growth (Change from 2024 to 2025)



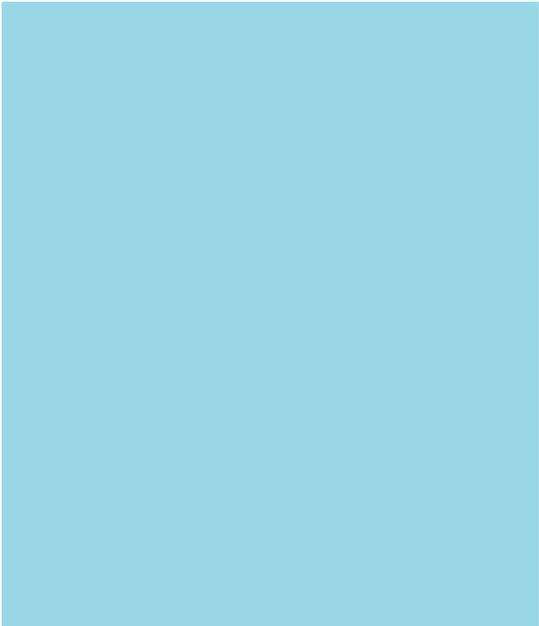
2025 Europe Value by Omega-3 Sources (in Millions, U.S. Dollar)



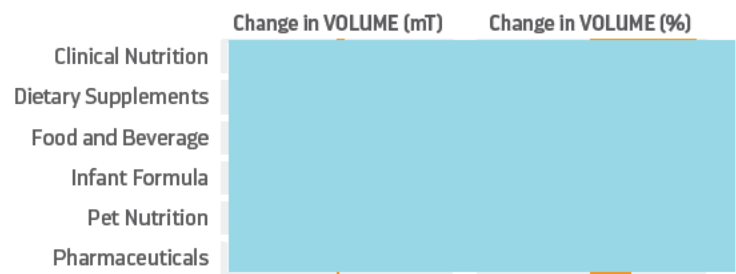
Europe Value Growth by Source (in Millions, U.S. Dollar) and Percent Growth (Change from 2024 to 2025)



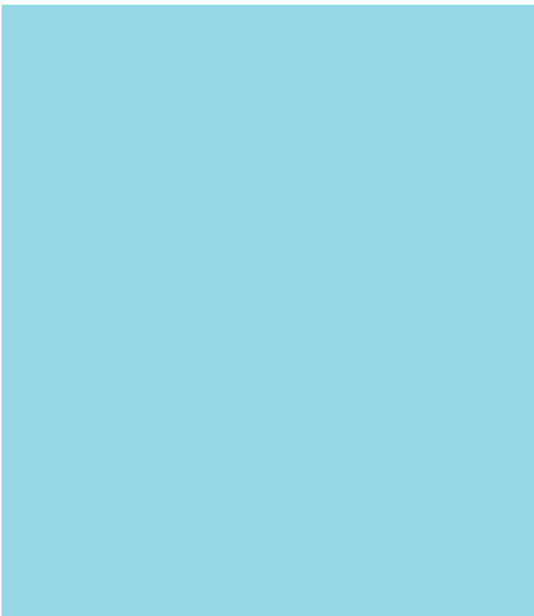
2025 Europe Omega-3 Volume by Application (in Metric Tons)



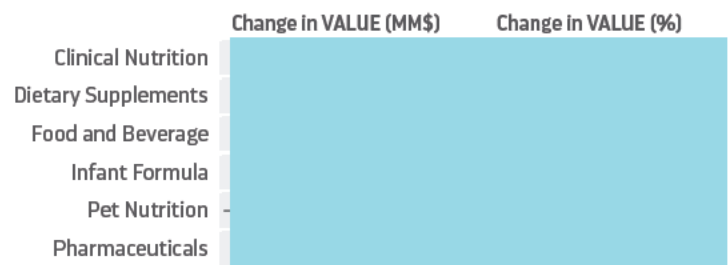
Europe Volume Growth by Application (in Metric Tons) and Percent Growth (Change from 2024 to 2025)



2025 Europe Omega-3 Value by Application (in Millions, U.S. Dollar)



Europe Value Growth by Application (in Millions, U.S. Dollar) and Percent Growth (Change from 2024 to 2025)



[SECTION CONTINUES IN FULL REPORT]

OMEGA-3 OIL APPLICATIONS*

This section provides information about the six end use categories that detail the finished product applications for EPA and DHA omega-3 oils. Also included is an At a Glance section highlighting each application according to source and region, where applicable.

**Omega-3 oil applications presented in order of descending value.*



DIETARY SUPPLEMENTS

Dietary supplements are found in every geography, and almost all omega-3 sources are represented, making it the largest and most varied application for omega-3 ingredients in terms of both volume and value.

This is the largest and most diverse segment of the omega-3 ingredient market, and it accounts for XX.X% of the volume and XX.X% of the value of EPA and DHA oils.

In terms of both volume and value, the USA (XX.X% of the global volume and XX.X% of the value) is the largest market, and it grew X.X% in volume. The second largest market, Europe (XX.X% of the volume, XX.X% of the value), contracted X.X%. In both of these markets, growth was decreased because a small number of consumers reduced their usage or exited the category after finished products increased in price due to the higher ingredient pricing triggered by crude fish oil shortages.

In the third largest market, China, the supplement category (XX.X% of the volume; XX.X% of the value) saw a rapid shift in consumer preferences, with demand for premium ingredients, including concentrates and krill oil, continuing to increase. Tlor emipsu md olorsi ta m etconse c-teturadi piscingel it seddo eiusmo dtempor inci diduntutlab or eedolo remagnaa liquaut en imad-

The total volume of omega-3 oils sold for use in dietary supplements in 2025 was **XX,XXX metric tons (mT)**, a X.X% change from XX,XXX mT in 2024.

Value changed X.X% to **US\$X,XXX.X MM**.

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STRATEGY SIGNALS

Competitive climate: In many markets, the omega-3 supplement space is loremip sum dolorsitametcon sec teturadi pisci ngelitsed doeius mod temporinci diduntutlab or eedolore magnaaliq ua u tenimadmi.

Barriers to entry: Recurring supply volatility means that entry is now gated less by loremip sumd ol orsitametcon-sectetura dipisc ingeli. Tseddo eius modtem por incididu ntutlabo reetdolorem agnaal iquauten imadnimve, nia mqui Snos. Additionally, entrants can capitalize on l oremips um dolorsitame tconsec tet URA+DIP iscing elitse dd oei usmodte, mpo rincididunt utla bo reetdolor.

Supplier power: The fisheries that supply EPA+DHA sources are subject to natural variability in production lor emipsumdolor sitametc onsecteturadi. Pisc ingelitsed doeius modtempo rin cididu nt ut, lab oreet dolo rema gna aliqu aut animadmi, nim ve nia mq uisnostrude xer citati/onlore mi psumdo lorsitam etcons.

Substitutes: Dedicated EPA+DHA supplements are lo rem ipsu md olorsitametc onse ctetura dipisc in gelit seddo-e iusmodtempor. Lor emipsu mdolor si tame tcons ecteturadi piscingeli ts eddoe iusmodt em porincidi duntutlabo reet dolorem agnaaliq.

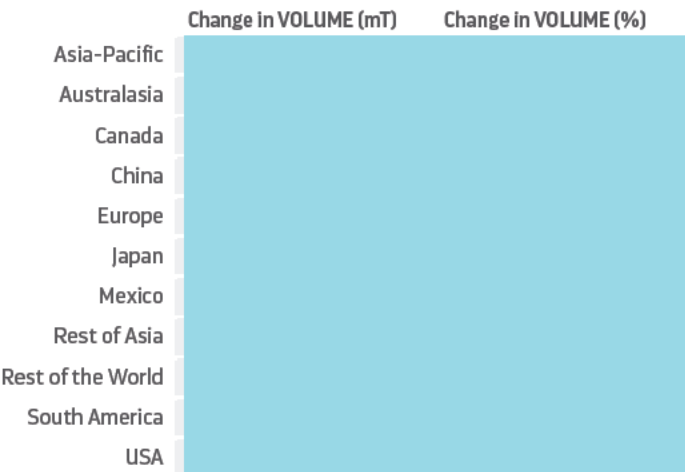
At a Glance: Dietary Supplements

Below and on the next page are market figures for Dietary Supplements by source and region.

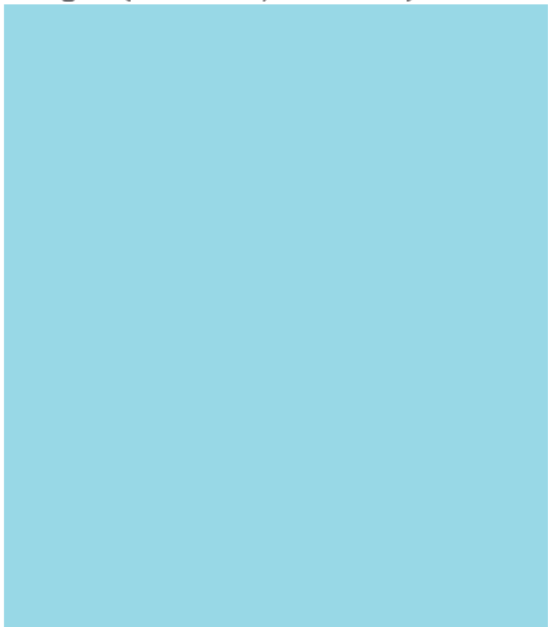
2025 Dietary Supplements Volume by Region (in Metric Tons)



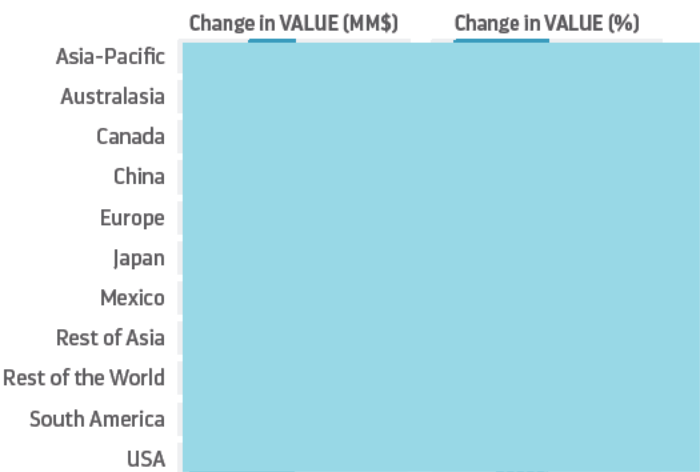
Dietary Supplements Volume Growth by Region (in Metric Tons) and Percent Growth (Change from 2024 to 2025)



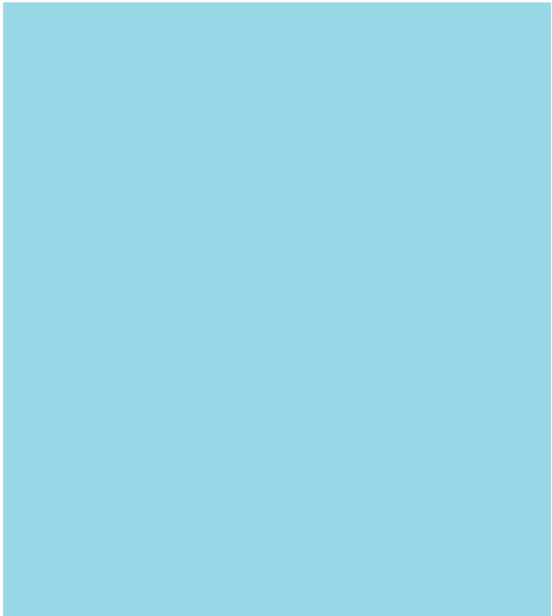
2025 Dietary Supplements Value by Region (in Millions, U.S. Dollar)



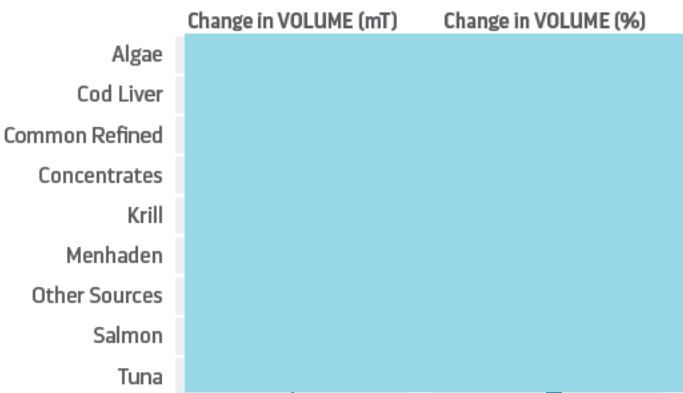
Dietary Supplements Value Growth by Region (in Millions, U.S. Dollar) and Percent Growth (Change from 2024 to 2025)



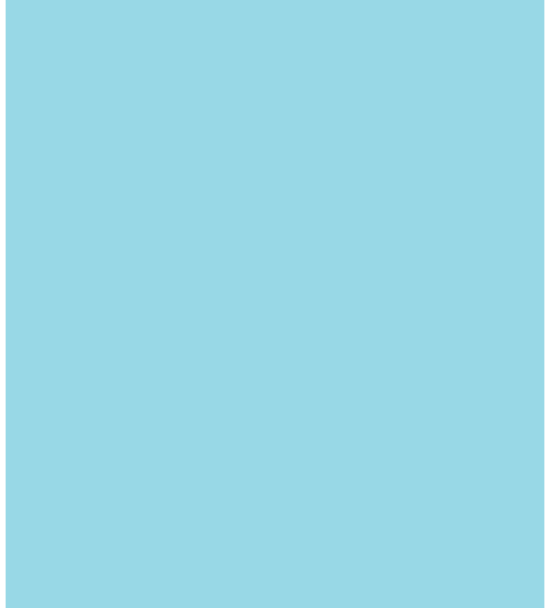
2025 Dietary Supplements Volume by Omega-3 Sources (in Metric Tons)



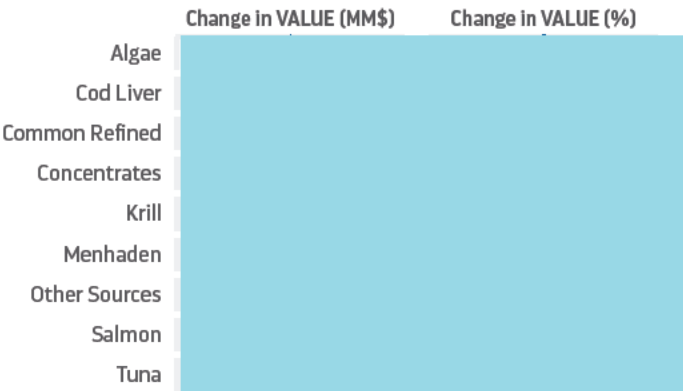
Dietary Supplements Volume Growth by Source (in Metric Tons) and Percent Growth (Change from 2024 to 2025)



2025 Dietary Supplements Value by Omega-3 Sources (in Millions, U.S. Dollar)



Dietary Supplements Value Growth by Source (in Millions, U.S. Dollar) and Percent Growth (Change from 2024 to 2025)



[SECTION CONTINUES IN FULL REPORT]

ACKNOWLEDGMENTS

We are profoundly grateful to all who provided us with insights and information for the preparation of this report. Without their data, and, more crucially, their knowledge, advice, time and generosity, this report would not be possible. Below is a partial list of companies that contributed information to this year's report. Others shared details but prefer to remain anonymous.

Aker Biomarine	H&H Group	Olvea
Arctic Bioscience	Huatai Biopharm	Pesquera Hayduk
ATK Biotech	HuveNutra	Pharma Marine
Austral Group	IFFO	Pharmavite
BASF	Kanematsu Corporation	Rimfrost
Bering Select	KD Pharma	Seafoodia
Better Origins	Kerry	Solutex
Bioriginal	King Pelagique	TASA
Cabio	Kinomega Biopharm	Thai Union
Carniolus	Mara Renewables	Tharos
Chr. Holtermann AS	Marex	Trident Seafoods
Copeinca	NASC	Umios Corporation
DSM Firmenich	Nature's Way	Veramaris
ED&F Man	NewScience	Vesteraalens
Epax	Nissui	Wiley Companies
GC Rieber	Nofima	WPIC
Global Nutrition Group (GNG)	Novosana	Xiamen Huison Biotech
Golden Omega	Nu-Mega Ingredients	Zooca
	Nutriscio	



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