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

Description: Pharmaceutical drugs, by default, have started incorporating higher concentrations of omega-3 and it is anticipated that, over the coming few years, several new companies would be jumping on to the bandwagon of omega-3 drugs. Several drugs are in Phase II or Phase III clinical trials, with several more expected to come on-stream quite soon. However, the coming year or two is likely to witness an influx of new companies invading the global omega-3 market, provided they obtain the USFDA's or other relevant authorities' approvals.

In a global scenario where increasing attention is being directed towards issues of sustainability and limited food supplies, algal sources offer immense scope for the rapidly expanding omega-3 market to continue in the same vein. The focus on obtaining EPA and DHA from algae was prompted by an endeavor to seek out more sustainable sources, since EPA and DHA are naturally contained in algae. Moreover, the omega-3 content in fish and krill originates from their consuming the algae directly or other creatures that feed on algae. In addition to being sustainable, algae also allows for farming that can be of help in putting up desirable labels, such as “vegetarian,” “kosher” or even “organic.”

The past several decades have been witness to research studies that have underscored the significance of omega-3 fatty acids in maintaining heart health, in addition to safeguarding against cancer and birth defects and offsetting symptoms of diabetes, arthritis, cognitive decline, depression and several other conditions. Omega-3 Polyunsaturated Fatty Acids (PUFAs) have been growing and continues to grow significantly in the future, attributed to the above benefits.

The report reviews, analyses and projects the market of marine and algal omega-3 polyunsaturated fatty acid ingredients for global and the regional markets including North America, Europe, Asia-Pacific and Rest of World. The regional markets further analyzed for 13 independent countries across North America – The United States and Canada; Europe – Germany, France, Italy, Spain, Norway, Denmark, The United Kingdom and Rest of Europe; Asia-Pacific – China, Japan, South Korea, India and Rest of Asia-Pacific.

Omega-3 Polyunsaturated Fatty Acid (PUFAs) ingredients market analyzed in this study include EPA and DHA omega-3s from marine oils such as fish oils, krill oils and squid oils; and algal oils. The end use application markets covered in the report include dietary supplements, food & beverages, pet nutrition, infant nutrition, pharmaceuticals and clinical nutrition. Worldwide, consumption of Omega-3 polyunsaturated fatty acids (PUFAs), estimated at 123.8 thousand metric tons worth US$2.3 billion in 2013, is forecast to be 134.7 thousand metric tons valued at US$2.5 billion in 2014. By 2020, it is projected that demand for Omega-3 PUFAs globally would reach 241 thousand metric tons with a value of US$4.96 billion, thereby posting a volume CAGR of almost 10% and a value CAGR of 11.6% between 2013 and 2020.

This 410 page global market report includes 126 charts (includes a data table and graphical representation for each chart), supported with meaningful and easy to understand graphical presentation, of market numbers. The statistical tables represent the data for the global omega-3 ingredients market volume in metric tons and value in US$ by geographic region, the product segment and application area. This study profiles 42 key global players and 106 major players across North America – 29; Europe – 35; Asia-Pacific – 30 and Rest of World – 12. The report also provides the listing of the companies engaged in the manufacturing and supply of omega-3 PUFAs as well as major players in the omega-3 end-use industries such as human nutrition, pet nutrition and pharmaceuticals and major ingredient distributors across the globe. The global list of companies covers addresses, contact numbers and the website addresses of 294 companies.
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Qponics Invests $5.5 million to Produce Algae-based Omega-3 oils
Enzymotec Ltd. Partners with Polar Omega A/S to Commercialize Omega PC™ Nutegrity™, New Business Name of Omega Protein's Human Nutrition Division
Neptune and Rimfrost Enter into Supply Agreement
Scoular and Arctic Nutrition Combine Forces to Offer Romega™
GC Rieber Oils Selects Novel Ingredient Services as Exclusive Distributor
Omega Protein Corp Expands Production Capacity of Specialty Dairy Proteins
Acasti Enters into Manufacturing Alliance
FMC Corporation Takes Over Epax AS
Biosearch Life's Plants Get Halal Certification
Solutions4CO2 Inc and Quinlan Brothers Ltd Form a Joint Venture
Bioseutica Divests Omega-3 Business to German Equity Firm Capiton
SeaDragon on a Capacity Expansion Spree
Qualitas Health and Valicor Renewables Enter into an Alliance
Golden Omega Recognized as a “Responsible” Supplier Of Omega-3 Fish Oils by IFFO
BASF Acquires Pronova BioPharma ASA
Tasa to Commence Concentrated Omega Oil Production in Peru
Algae Production Facility Acquired by Solarvest BioEnergy Inc
Amarin Includes Slanmhor Pharmaceutical Inc into its Global Supply Chain
Qponics and Nutrition Care Pharmaceuticals Sign a Memorandum of Understanding (MoU)
Aurora Algae Obtains US$2.01 Million Grant
Royal DSM Takes Over Ocean Nutrition Canada
Grain Millers, Inc Takes Over Milling Assets of ENRECO, Inc
Equateq Ltd Acquired by BASF
Stauber Performance Ingredients Takes Over Pharmline
Neptune Mass Markets NKO® Premium Krill Oil through Jamieson Laboratories
AlgiSys Successful in Raising US$2.5 Million
Phase-I Facility Expansion Initiated by Neptune at Sherbrooke
Photonz Corp Transfers Fermentation Process to a Canadian Contract Facility
Pfizer Acquires Ferrosan's Consumer Health Operations
Golden Omega's Omega-3 Concentrate Plant Granted Environmental Approval
Cargill and BASF Plant Science in Collaboration for Developing EPA/DHA Canola Oil
Lipid Technologies Retained as Strategic Consultant by Omega Protein
EID Parry Acquires Valensa
GC Rieber Oils Sets Up North American Office
Omega Protein Acquires InCon Processing LLC
Photonz and Novaesq Form an Alliance
Hofseth Biocare's First Processing Facility in Midsund, Norway Inaugurated
Hofseth Biocare Appoints TSI Health Sciences as Distributor
Neptune Reinforces Asian Operations by Entry into Indian Market
Stepan Takes Over Select Product Lines from Lipid Nutrition BV
Minami Nutrition Grants Distribution Rights to Garden of Life LLC
Worldwide Supply Network for AMR101 Formed by Amarin
Photonz Corp and Separax SAS Sign an Agreement
Enzymotec and Lupin Sign a Contract
Ocean Nutrition Canada and Wilmar International Enter into Strategic Agreement
Royal DSM Acquires Martek Biosciences Corp
Omega Protein Acquires Cyvex Nutrition
Minami Nutrition Acquired by Atrium Innovations
Omega-3 Concentration Facility Inaugurated by GC Rieber Oils
Polaris Acquires Ocean Nutrasciences
Aurora Algae's Operations Extended to Perth, Australia
Pizzey's Nutritionalis Rebranded as Glanbia Nutritionals
Oxford Nutrascience and Ocean Nutrition Canada Sign an Agreement
China Grants Approval for Food Use of Omega-3
Aker BioMarine and Lindsay Goldberg in an Equal Joint Venture
Twin Rivers Technologies Acquired by Felda IFFCO Sdn Bhd, Renamed FINA LLC

7. KEY PRODUCT/TECHNOLOGY TRENDS
Novel 100% Canadian Omega-3 Rich Camelina Sativa Oil from Biodroga Inc
Enzymotec’s K-REAL® Krill Oil Certified by “New Food Raw Material"
LYSI Starts the Supply of FoS-Certified Omega-3 Oil
Neptune Certified by "New Food Raw Material" in China
Investigational New Drug Submission of Acasti Receives FDA Approval for its PK trial of CaPre®
"New Food Raw Material" Certification for Aker BioMarine's Superba™ Krill
Application Submitted by Rothamsted Research to DEFRA for Producing Omega-3 from GM Camelina Sativa
Corda Received IFOS™ 5-Star Supplier Certification for its Incromega™
Omega3 Innovations’ Omega Heaven Receives 2013 Supply Side Editors Choice Award
DSM Unveils Algal Omega-3 Oil
First Swedish Algal Omega-3 Oil Launched by Simris
Ecoduna Develops and Tests Bioreactor Prototype for Industrial Production of Microalgae
Source-Omega Launches POWER OMEGA™ Omega-3 Mini Softgel
PURE ONE® DHAlicious™ Omega-3 Chromista Oil Product Introduced by Source-Omega
GC Rieber Oils Launches VivoMega Line of Products in Asia
Omega-3 Products Launched by Nordic Naturals in Quebec
Qualitas Health Targets Commercial Quantities of Omega-3 Fatty Acids at Imperial, Texas Facility
Solarvest Bioenergy Inc Files Application for US Patent
Researchers Extract Omegas 3, 6 and 9 from Microalgae
BASF Unveils Newtrition™ Human Nutrition Brand
Omegatri Develops World’s First Compressible Omega-3 Tablets to be Launched by Lysi HF
Taisho Pharmaceutical Introduces Epadel T
Amundsen Omega-3 Obtains Friend of the Sea Seal of Approval
Valensa International Launches Perilla Seed-Based Omega-3 Fatty Acid
AquaKrill Oil ™ Liquid Krill Oil Introduced by Azantis
Ayanda Revolutionizes Intake of Fish Oil by Humans
Oceans Omega’s Omega Infusion™ Water Enhanced with Omega-3 Now in Giant Food Stores
Arctic Nutrition Innovates Omega-3 Extraction
EID Parry Targeting OTC Segment in India
Amarin Corp’s Fish Oil Capsules Granted FDA Approval for Hypertriglyceridemia Patients
Cellana Introduces New Range of Algal Omega-3 Products
Omega-3 Product Targeting Women Introduced by Polaris Lipid Nutrition
OmeGo™ Salmon Oil Launched by Hofseth Biocare in the United States
Liver Lipid Metabolism Found to Improve by Krill Powder in Inflammation Prototype
Veda-Vida Innovations Introduces Omega-3 in High-Dose Powder Forms
Golden Omega Introduces New Range of Omega-3 Products
Pronova Marks Entry into the Omega-3 Supplements Sector
Golden Omega Showcases Products for the United States Market
Pharma Marine Introduces Oceans Omega-3 Ingredient Family
Enzymotec Debuts K*REAL Real Krill Oil
Hofseth Biocare to Commence Supply of Omega-3 with “24 Hour Virgin Oil” Salmon
Ascenta Launches NutraSea DHA
Organic Fat-Free Milk plus DHA Omega-3 Introduced by Horizon®
Neptune's NKO® Gets Approval from Health Canada
New Clinical Study Published by Aker BioMarine Pertaining to Superba™ Krill Oil
Results from DuPont Study on Omega-3 from GM Yeast Out
Eau Plus’ Omega-3 from Algae Cynosure of Several Manufacturers
SourceOne and FINA Unveil Proprietary Technology for Omega-3 Emulsions
Cargill Launches Clear Valley® Omega-3 Oil
NutraVege Vegetarian Omega-3 Vegetarian Supplement Unveiled by Ascenta
Pharma Marine Group Launches Calamarine™ Sustainable Marine-Source DHA
Cenestra Health Obtains Omega-3 Formulations Patent

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ALGisys LLC (United States)
Aurora Algae, Inc. (United States)
Biodroga Inc. (Canada)
Bioprocess Algae, LLC (United States)
Bioriginal Food & Science Corporation (Canada)
Cellana Inc. (United States)
Connoils LLC (United States)
Felda IFFCO LLC (United States)
Heliae Development LLC (United States)
Marine Ingredients (United States)
Neptune Technologies & Bioressources Inc. (Canada)
Nordic Naturals, Inc. (United States)
Novotech Nutraceuticals, Inc. (United States)
Nutrifynn Caps, Inc. (United States)
Oceans Omega, LLC (United States)
Omega Protein Corp. (United States)
Incon Processing LLC (United States)
Cyvex Nutrition, Inc. (United States)
Organic Technologies (United States)
Originates Inc (United States)
Pharmachem Laboratories, Inc. (United States)
Qualitas Health Inc (United States)
Rimfrost USA, LLC (United States)
Solarvest Bioenergy Inc. (Canada)
Source-Omega LLC (United States)
The Wright Group (United States)
Virun, Inc. (United States)
Wiley's Finest Inc (United States)
Zymes LLC (United States)

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Arctic Nutrition AS (Norway)
Ayanda AS (Norway)
BASF SE (Germany)
Pronova BioPharma ASA (Norway)
BASF Pharma (Callanish) Limited (United Kingdom)
BASF AS (Norway)
Berg Lipidtech AS (BLT) (Norway)
Biosearch, S.A. (Biosearch Life) (Spain)
Bluebiotech International Gmbh (Germany)
BTSA Biotecnologias Aplicadas S.L (Spain)
Copalis (France)
Croda International PLC (United Kingdom)
Denomega Pure Health (Norway)
Epax AS (Norway)
Flavex Natureextrakte GmbH (Germany)
GC Rieber Oils (Norway)
Hofseth Biocare AS (Norway)
IOI Imperial-Oel-Import (Germany)
KD-Pharma Gmbh (Germany)
Lonza Group Ltd (Switzerland)
LYSI hf. (Iceland)
Marine Harvest Ingredients (Norway)
Norwegian Fish Oil (Norway)
Olvea Fish Oils (Olvea Group) (France)
Olympic Seafood AS (Norway)
Omegatri AS (Norway)
Omnipharm SAS (France)
Pharma Marine AS (Norway)
Polaris Nutritional Lipids (France)
Royal DSM NV (The Netherlands)
Seven Seas Ltd (United Kingdom)
Simris Alg AB (Sweden)
Smit Functional Oils (Smit & Zoon Group) (The Netherlands)
Solutex GC, S.L. (Spain)
Stepan Lipid Nutrition (The Netherlands)
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Arjuna Natural Extracts Limited (India)
Avesthagen Limited (India)
Bizen Chemical Co Ltd (Japan)
Chempport, Inc. (Korea)
Coastal Aquatic Proteins (India)
ECA Healthcare Inc (China)
Ennature Biopharma (India)
Fenchem Biotek Ltd (China)
Fujian Coland Enterprises Co Ltd (China)
Guangdong Runke Bioengineering Co Ltd (China)
Hebei Haiyuan Health Biological Science and Technology Co., Ltd. (China)
Huatai Biopharm Inc. (China)
Hubei Fuxing Biotechnology Co Ltd (China)
Jiangsu Auqi Marine Biotechnology Co., Ltd. (China)
Kinomega Biopharm Inc. (China)
Maruha Nichiro Foods Inc. (Japan)
Nippon Suisan Kaisha, Ltd. (Nissui) (Japan)
Nisshin Pharma Inc. (Japan)
Novosana (Taicang) Co. Ltd. (China)
Nu-Mega Ingredients Pty Ltd (Australia)
Parry Nutraceuticals (India)
Photonz Corporation (New Zealand)
Qponics Limited (Australia)
Seadragon Marine Oils Ltd (New Zealand)
Shandong Keruier Biological Products Co (China)
Shandong Yuwang Industry Co Ltd (China)
Sinomega Biotech Engineering Co Ltd (China)
Wuxi Xunda Marine Biological Products Co., Ltd. (China)
Zhejiang Shenzhou Marine Bio-Tech Co Ltd (China)

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Austral Group S.A.A. (Peru)
Cox & Compañía S.A. (Chile)
Golden Omega SA (Chile)
Natural Oils Chile SA (Chile)
Naturmega SA (Colombia)
Pesquera Camanchaca SA (Chile)
Pesquera Diamante SA (Peru)
Pesquera Hayduk SA (Peru)
Quimica Industrial Spes SA (Spes SA) (Chile)
TASA Omega SA (Tecnológica De Alimentos SA) (Peru)
Vicami SA (Argentina)

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