

GOED ANNUAL REPORT



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OUR TEAM

LETTER FROM THE MANAGING DIRECTOR

2025 was a solid year for GOED and for the omega-3 category globally. After supply chain challenges in 2023 and a recovery year in 2024, 2025 saw the overall category grow 2.5% at the raw material segment of the supply chain, with the strongest growth in China and other emerging markets. The major issue in 2025 was the ongoing uncertainty in the market because of US-initiated tariffs that impacted many of the countries in the omega-3 supply chain. The ever-changing tariff rates and unpredictability of what might happen next made business planning challenging and has the potential to impact innovation.

At GOED, 28 new members from 13 countries joined our organization in 2025, and we added two new GOED members to our board of directors, plus welcomed a new slate of Plus and Base elected members for a two-year term.

GOED introduced several major initiatives during 2025. A scientific consensus panel to determine a scientifically-based EPA and DHA recommendation was formed and the work continued into 2026, with a peer-reviewed paper and public launch planned for later this year.

We also commissioned a Life Cycle Assessment white paper to help members and industry understand the components of a good life cycle assessment regardless of omega-3 source. There are several phases to this project and reports will be published throughout 2026.

GOED continued work on the ongoing MOAH situation, engaging with the European Commission on ongoing concerns, and testing member products to evaluate interference issues to further inform future discussions.

We did significant work on a Codex Microbial Oil Standard and were rewarded with a decision in early 2026 to move this initiative to the next phase within the Codex framework.

A key member benefit added during the year was our Global Omega-3 Navigator, which is a members-only tool that allows companies to search an interactive database for global health claims, recommended intakes, quality standards, food additive and contaminant requirements. We also debuted a quarterly newsletter specifically for our brand members, as well as a Contaminants Scorecard that helps keep members informed of upcoming contaminants of concern to the omega-3 category.



ELLEN SCHUTT
Managing Director

LETTER FROM THE BOARD CHAIRPERSON

As I conclude my role as Chair of the GOED Board, I would like to recognize the outstanding work and dedication of the entire GOED team, our officers, board members, and, most importantly, all the members of our organization.

In 2023, our industry faced one of its greatest challenges due to severe supply disruptions and significant price increases. Fortunately, 2024 became a year of recovery, and during my final year as GOED Chair, we returned to a path of growth.

This progress was possible because our organization remained committed to promoting quality standards, supporting our members across the value chain, and, most importantly, continuing to bring to consumers around the world the importance of consuming EPA and DHA.

Last year, one of our ongoing goals was to continue building an organization driven by a highly motivated team working in a professional environment, supported by standard operating procedures (SOPs) that enhance our daily work. Strengthening our industry knowledge also remains essential to helping our members stay focused on growth.

However, these efforts alone are not enough. Our industry must continue promoting new sources of EPA and DHA and introducing new concepts that leverage raw materials from sustainable sources and fully traceable supply chains. These initiatives will guide our long-term growth and reinforce our mission to make EPA and DHA accessible to the world.

GOED's success is only possible when all of our members work together, contributing their time, dedication and support to the organization. I will always remain at the service of GOED.



GONZALO CACERES

Board Chairperson

2025 NEW MEMBERS



NEW BOARD MEMBERS

The following members upgraded to the Leadership level:

- Naturmega
- Nutrasource

PLUS LEVEL

- Queisser Pharma (Germany, brand)

BASE LEVEL

- Bare Biology (UK, brand)
- Best World/Avance (Singapore, brand)
- BTC Europe (Germany, distributor)*
- Cheongan Organics (BNM) (Korea, brand)
- Cheongdam Healthcare (Korea, brand)
- Doctor Check (Korea, brand)
- Dynes Biotechnology (Taiwan, ingredient manufacturer)
- Empresa de Nutricion Argentina S.A. (Argentina, brand)
- Epion Brands/Kori (USA, brand)*
- GAGO Biotechnology (China, crude oil supplier)
- Gelita (USA, contract manufacturer)
- H&H (Australia, brand)
- High 5 Health (Canada, ingredient manufacturer)
- Homenvoy (Global) Group Ltd. (China, brand)
- Inner Mongolia Kingdomway Pharmaceutical Limited (China, brand)

- IVB Wellness (Spain, brand)
- Kyung Nam Pharm Co, Ltd. (Korea, brand)
- Lang Pharma Nutrition (USA, contract manufacturer)*
- Mylnefield Lipid Analysis (UK, testing lab)
- Nova Natural (Norway, brand)*
- NovasPure (Canada, brand)
- Orizon (Nutrisco) (Chile, crude oil supplier)
- PharmaBros (Korea, brand)
- Seawit (China, ingredient manufacturer)
- Solution Top (Korea, brand)
- Suplalim (Chile, brand)
- Triton Omega (USA, brand)

ASSOCIATE LEVEL

- Holland & Barrett (UK, retail/brand)
- Natural Life Nutrition Inc. (Canada, testing lab)
- Omegametrix (Germany, value add)
- Omind Science Inc. (Canada, testing lab)

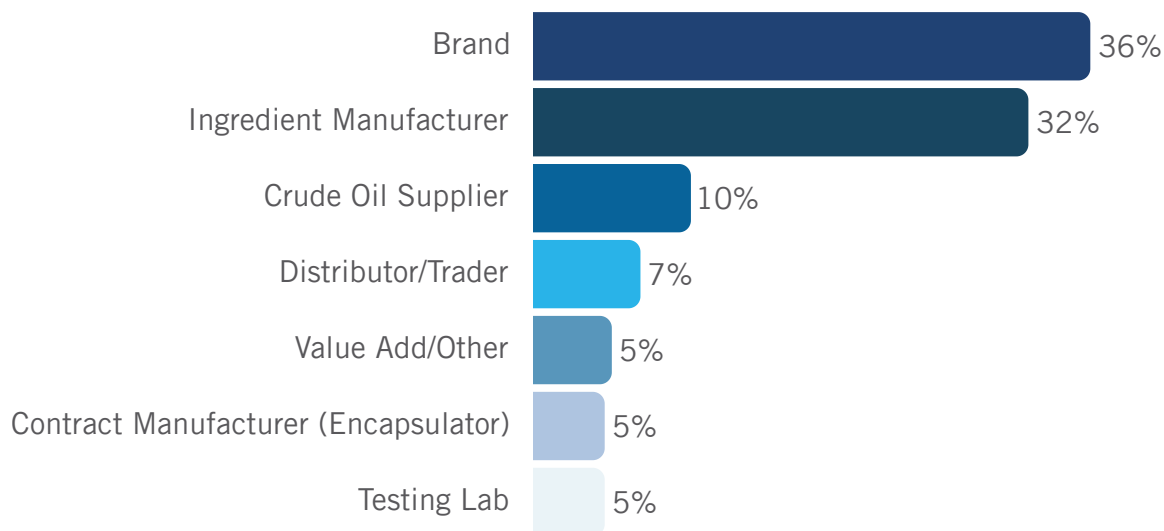
TOTAL NEW MEMBERS: 32

**Affiliates are companies who joined membership through the parent/affiliate provision in the revised GOED Bylaws.*

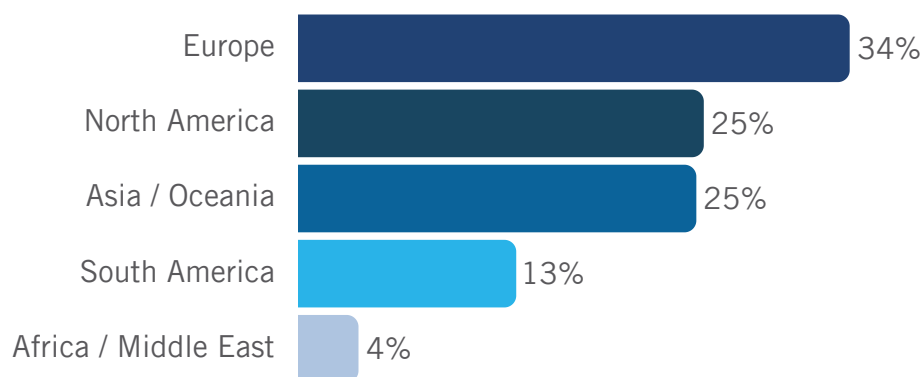
MEMBERSHIP AT A GLANCE

Membership records as of December 2025

GOED MEMBER VALUE CHAIN POSITIONS, BY PERCENTAGE



HEADQUARTERS OF GOED MEMBERS, BY REGION



ACTIVITIES THROUGHOUT THE YEAR

MEMBER SERVICES

- Updated GOED Bylaws were officially approved by GOED membership.
- GOED updated the process for investigating complaints against members who may be out of compliance with the GOED Code of Ethics and Business Practices and/or the GOED Monograph.
- GOED conducted our 2025 member survey; 92% of respondents were satisfied with their membership and 53% reported that their satisfaction increased over the past year.
- GOED joined the Executive Council of IADSA, the International Alliance of Dietary/Food Supplement Associations, to be better connected with global regulatory discussions.
- GOED signed a memorandum of understanding to partner with the China Chamber of Commerce for Import & Export of Medicines & Health Products (CCCMHPIE).
- We welcomed Alexandra Gautier to our team as Member Services Project Coordinator.
- GOED created The Omega-3 Innovation & Solutions Forum, a new platform to highlight the expertise of our members offering value-added services.
- We updated our Consumer Survey Data Explorer, which offers over a decade of GOED-commissioned research on consumer health and wellness behaviors and attitudes from more than 20 countries. We published findings from our latest consumer surveys in the US, France and Italy, revealing increased omega-3 consumption across all three markets.
- GOED launched a portal to showcase the sustainability of the omega-3 category. The portal includes details by omega-3 source and catalogs the work GOED has done to better understand ESG issues.
- GOED redesigned the home page of our website to offer streamlined navigation and quicker access to GOED's resources.
- We developed an infographic illustrating the value of GOED membership to help members communicate this commitment to customers.
- GOED refreshed the look of our weekly newsletter *The GOED Current* to improve readability and help members quickly access the most important omega-3 industry news.



COMMUNICATIONS

- We published the 2025 edition of the [Ingredient Market Report](#).
- GOED commissioned *Nutrition Business Journal* to conduct market research on US supplement consumers' attitudes toward omega-3s, revealing [key insights](#) on their knowledge and purchasing preferences.
- GOED hosted a [Spotlight on China webinar](#), featuring insights from GOED partner [Alibaba](#) and GOED member [WHC](#) on China's cross-border e-commerce, social media trends and WHC's successful marketing approaches.
- In conjunction with our partner [Pattern](#), we hosted a [webinar](#) on what it takes for supplement brands to succeed in the era of AI-powered and social-driven product discovery.
- GOED released a [video](#) to clarify marketing, labeling and misconceptions about omega-3s in the Chinese market.
- GOED updated the [2026 Communications Toolkit](#), a resource designed to help members effectively communicate the benefits of EPA and DHA omega-3s to consumers.
- GOED released a new infographic on EPA/DHA omega-3s for heart health, offering two versions: one that is [EFSA-compliant](#) and one that is [US-compliant](#).
- We also updated eight of our [consumer infographics](#). Some of them were translated into Chinese and Spanish to support global consumer education.



GLOBAL OMEGA-3 DAY 2025

Global Omega-3 Day™ 2025 made waves worldwide, generating thousands of posts and driving awareness across multiple regions. With over 53,000 media mentions in the month before March 3, GOED's consumer press release reached a potential audience of 212 million via 525 media outlets. Google search trends for the term "omega-3" also surged 14% year-over-year, marking February/March 2025 as the highest per capita interest since 2004.

In addition, members participated in a video campaign "What Global Omega-3 Day Means to Me," which garnered over 2,600 views. Member brands leveraged the day with promotions and product launches and many influencers, dietitians, brands and GOED members helped spread the message about omega-3s on LinkedIn, Instagram and other social media platforms. Overall, the event successfully amplified awareness of EPA and DHA omega-3s. More details can be found in [the recap](#).



Global Media Mentions

Global media mentions of omega-3s across multiple languages saw two major spikes in the past 30 days, up to and including Global Omega-3 Day (March 3). The first was driven by GOED's consumer press release and the second by Global Omega-3 Day events.



- GOED shared a [key messages document](#) to support member responses to consumer inquiries about omega-3 benefits and for use in marketing or FAQs.
- GOED presented the latest science on EPA+DHA omega-3s at the FoodFluence conference in Berlin, Germany featuring an omega-3 tasting party.
- At the Academy of Nutrition and Dietetics' Food & Nutrition Conference & Expo (FNCE), GOED participated in a session on "Nutrition's Role in Preventing Preterm Birth."
- GOED was featured on [The Nourished Child podcast](#) with pediatric dietitian Jill Castle that highlighted the importance of omega-3s for children as well as the [Inside Sports Nutrition podcast](#).



SCIENCE & SUSTAINABILITY

- GOED compiled an expert panel for a Scientific Consensus project, the goal of which is to define an EPA + DHA intake recommendation for healthy adults.
- A paper providing an analysis of the risks and benefits of EPA and DHA omega-3 supplementation from a healthcare cost perspective, co-authored by GOED, was published online in the peer-reviewed journal *Value in Health*.
- GOED published a Clinical Study Database (CSD) report on dry eye disease, along with a summary video.
- We released a new feature in the CSD, allowing users to search beyond human studies for science on animal or cell-based studies. A tutorial video on how to use this tool is available.
- GOED's CSD was cited in two publications by Dr. Jeffery Heilesen and in a review by Drs. Simon Dyall and Mélanie Plourde.
- GOED selected two recipients for the 2025/26 CSD Research Awards Program. The recipients will use the CSD in their PhD research, focusing on the relationships between nutrition, metabolic health and brain health.
- GOED published a data snapshot on omega-3s and skin health.
- GOED's VP of Data Science Aldo Bernasconi and his coauthors received a "highly cited author" certificate from *Mayo Clinic Proceedings* for the February 2021 paper on omega-3 dosage and cardiovascular health. The study found that higher omega-3 dosages significantly reduce cardiovascular risk.
- GOED hosted a satellite symposium at the International Society for the Study of Fatty Acids and Lipids (ISSFAL) Congress, "Translating Research into Global Recommendations." The session highlighted the interplay between scientific research and government policy, regulations and health claims.
- GOED commissioned a project to publish a LCA (life cycle assessment) white paper to help define what a valid LCA looks like across omega-3 sources. The project deliverables will be available in 2026.
- We released our second member sustainability survey with input from 100+ members, an extension of GOED's goal to benchmark the sustainability of the omega-3 space.



REGULATORY AND TECHNICAL AFFAIRS

- GOED launched the Global Omega-3 Navigator (GO-3N): Regulatory and Technical, an interactive tool designed to help members easily access and navigate global regulatory and technical information relevant to the omega-3 industry. In Q4, two new topics, Food Additives (Antioxidants) and Labeling Tolerances, were added to the Navigator.
- GOED developed a contaminants scorecard to provide a high-level overview about upcoming contaminants of possible relevance for the EPA/DHA omega-3 sector.
- GOED completed our annual Randomized Testing Program.
- GOED released a video overview of GOED's Monograph, detailing the scope and quality requirements.
- The Technical Committee developed a short instruction on how to properly calculate the levels of five long-chain omega-3 polyunsaturated fatty acids that are not EPA and DHA in EPA/DHA omega-3 oils. This information has been added to GOED's Technical Guidance documents (see page 9).
- GOED collected feedback from members several times for the Codex Draft Standard for Microbial Omega-3 Oils, ahead of the CCFO29 meeting in February 2026.
- GOED provided written comments on the Scientific Report of the 2025 Dietary Guidelines Advisory Committee (DGAC).



- GOED submitted a letter to the Secretary of the United States Department of Commerce addressing the issue of tariff exemptions for EPA and DHA imports. GOED also updated members on ongoing updates to US reciprocal taxes.
- GOED hosted a webinar on leveraging Foreign Trade Zones (FTZs) to manage tariffs and streamline customs with our partner organization UNPA.
- GOED updated members on the next steps announced by the US Food and Drug Administration (FDA) and the US Department of Health and Human Services (HHS) on "Operation Stork Speed," a program aimed at improving the quality, safety and nutritional adequacy of infant formula products. GOED submitted a recommendation to the FDA to establish requirements for the mandatory addition of DHA and arachidonic acid (ARA) to infant formula.
- GOED kept members updated about developments in the Canada/United States DRI review for macronutrients process, including delays in the process due to the US government shutdown and details of an American Society for Nutrition (ASN)-sponsored webinar, "Setting the Stage for Determining Dietary Reference Intakes for Macronutrients: Update from the Joint Federal US-Canada DRI Working Group."

- GOED provided comments to the Chinese government regarding the Draft National Standard for Health Food Raw Material Fish Oil, to address a proposed ban on concentrates higher than 70 g/100g.
- GOED submitted comments to the Brazilian Health Regulatory Agency (ANVISA) regarding algae products.
- GOED provided feedback in response to EFSA's Draft scientific opinion on the safety of supplemental DHA.
- GOED updated members on the European Commission's targeted consultation on setting maximum levels for 3-MCPD and glycidyl esters in compound foods with over 5% fat that include vegetable, fish or marine oils.
- GOED published a new technical report entitled, "Summary report Evaluation of method suitability for quantification of EPA, DHA and Total Omega-3 in omega-3 oils by ISO 12966." This report explains why the method is not appropriate for omega-3 oils.
- GOED coauthored a paper with Exponent, "The Intake of Omega-3 Oils and Vegetable Oils in the European Union," published in *Food Additives & Contaminants: Part A* to highlight differences in omega-3 oil intake versus vegetable oils.
- GOED virtually attended the US FDA expert panel on non-exempt infant formula (i.e. for healthy, full-term infants), which was convened to begin discussing various topics of relevance to infant formula, including nutrient composition (e.g. fatty acids).
- GOED selected two awardees for the 2025-2026 Special Achievement Program for testing laboratories: Eurofins Nutrition Analysis Center and KD LabService.

MOSH/MOAH UPDATES

GOED actively engaged with the European Commission (EC) regarding the planned regulation of mineral oil hydrocarbons (MOH). We provided updates to the membership on the expected EU regulations, submitted a letter to the Commission detailing our concerns for EPA/DHA omega-3 oils, received a reply addressing some of our points and were invited to participate in the EC stakeholder forum on MOH in food additives. Furthermore, we kept members informed on the latest draft proposal (SANTE PLAN 2023/2345 Rev.7) to amend Regulation (EU) 2013/915 concerning maximum levels of mineral oil hydrocarbons in food.

Additionally, GOED undertook a new project to better understand natural interferences in MOAH test results, testing crude and refined oils to analyze substances of natural origins that look like MOAH, leading to false positives in test results. Final results of this project will be available in 2026.

See all of GOED's updates and correspondences on MOSH/MOAH here.

WHERE WAS GOED IN 2025?

- Our global team gathered in Miami, Florida at the beginning of the year for a team retreat for insightful conversations around GOED's goals, 2025 projects and ways to enhance collaboration and provide more value to our members.
- GOED hosted Omega-3 Resource Centers, along with members, at Vitafoods Europe (Barcelona, Spain), Vitafoods Asia (Bangkok, Thailand) and SupplySide Global (Las Vegas, Nevada, US).
- GOED attended the following trade shows and conferences:
 - Vitafoods India in Mumbai, India
 - IADSA conference in Washington DC, US
 - Natural Products Expo West event in Anaheim, California, US
 - AOCS meeting in Portland, Oregon, US
 - IFFO Members Meeting in Madrid, Spain
 - IFFO China Summit in Guangzhou, China
 - Hi & Fi China in Shanghai, China
 - ISSFAL Congress in Quebec City, Québec, Canada
 - NBJ Summit in Rancho Palos Verde, California, US
 - IUNS-ICN 2026 nutrition conference in Paris France
 - Fifth International Congress on Mineral Oil Contaminants in Food, Berlin, Germany
 - Seafood Nutrition Partnership (SNP)'s State of the Science conference in Washington DC, US
 - Food & Nutrition Conference & Expo (FNCE) in Nashville, Tennessee, US
 - IFFO Annual Conference in Tokyo, Japan



STATEMENT OF FINANCIAL POSITION

Net Activities (January - December 2025)

	Actual	Budget	Over Budget
Income			
Dues Revenue	2,655,661.75	2,515,184.00	(140,477.75)
Non-Dues Revenue	54,706.01	75,000.00	20,293.99
Total Income	2,710,367.76	2,590,184.00	(120,183.76)
Expenses			
Fixed Expenses	1,861,593.77	1,961,764.00	100,170.23
Variable Expenses	596,040.23	563,000.00	(33,040.23)
Total Expenses	2,457,634.00	2,524,764.00	67,130.00
Net Operating Income	252,733.76	65,420.00	(187,313.76)

Assets	Liabilities
Current Assets	Current Liabilities
Bank Accounts	Accounts Payable -
Chase 0539 (Checking) 452,422.52	Credit Card 18,468.84
Chase (Certificate of Deposit 1) 269,265.61	Other Current Liability 44,610.00
Chase (Certificate of Deposit 2) 261,036.36	Total for Current Liabilities 63,078.84
Total for Current Assets 982,724.49	Long-term Liabilities -
Fixed Assets	Total for Liabilities 63,078.84
Accumulated depreciation (12,857.71)	Equity
Office Equipment 19,885.59	Opening Balance Equity 38,316.12
Total for Fixed Assets 7,027.88	Retained Earnings 702,693.20
Other Assets -	Net Income 185,664.21
Total for Assets 989,752.37	Total for Equity 926,673.53
	Total for Liabilities and Equity 989,752.37

OUR TEAM



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Managing Director



Harry B. Rice, PhD
Vice President of Regulatory
& Scientific Affairs



Aldo Bernasconi, PhD
Vice President of Data
Science



Gerard Bannenberg, PhD
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Elana Natker, MS, RD
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