

# CONTENTS

## EXECUTIVE SUMMARY 3

## SCOPE AND METHODOLOGY 11

### OMEGA-3 OIL SOURCES\* 15

- Concentrates 16
- Common Refined Oils 21
- Algae Oil 25
- Tuna Oil 29
- Miscellaneous Pet Food Oil 33
- Krill Oil 35
- Salmon Oil 37
- Cod Liver Oil 40
- Menhaden Oil 43
- Green-Lipped Mussel Oil 46
- Squid Oil 48
- Calanus Oil 51
- Pollock Oil 53
- Hoki Oil 54

### OMEGA-3 OIL REGIONS\* 56

- United States 57
- Europe 61
- China 65

- Asia-Pacific 69
  - Japan 73
  - Canada 77
  - Rest of Asia 80
- South America 83
- Rest of the World 86
- Australasia 89
- Mexico 92

### OMEGA-3 OIL APPLICATIONS\* 95

- Dietary Supplements 96
- Pharmaceuticals 100
- Infant Formula 103
- Pet Nutrition 107
- Food and Beverage 111
- Clinical Nutrition/Medical Food 115

## INDUSTRY SUMMARY 118

## ACKNOWLEDGMENTS 121

## APPENDIX 122

*\*Presented in order of descending value.*