



**MARKET ACCESS SECRETARIAT
Global Analysis Report**

Health and Wellness Series

OMEGA-3 Trends

in Food, Drinks, and Pet Food

Septembre 2016



EXECUTIVE SUMMARY

Globally there were 8,218 products containing Omega-3 introduced between January 2010 to December 2015, with 6,515 in Food, 1,484 in pet food and 219 in drinks.

During the evaluation period, the use of Omega-3 has been on a rise, with the most new product launches (1964) occurring in 2014. Globally, Canada saw the most new product launches containing Omega-3, with a total of 1,807. While the United States and the United Kingdom were the second and third largest.

Unilever, Sobeys, and Mars are the top three companies in the world to launch new products containing Omega-3. Unilever launched 214 new products, which were predominately from the dairy subcategory. Sobeys, as the second largest launched 170 products, predominately from processed fish, meat and egg products. Thirdly, Mars launched 144 products, 30% of which came from the pet food category.

The top growing trends used on newly introduced products containing Omega-3 are ethical – environmental (up by 78.8%) and no additives/preservatives (up by 20.5%), however, gluten-free and low/no/reduced allergen claims are on a decline. Overall, most of the new product launch claims were related to health, lifestyle and the environment.

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NEW PRODUCTS WITH OMEGA-3

From January 2010 to December 2015, there were 8,218 new products launched globally that contained Omega-3. Of the total new product launches around the world, food was the largest category with the most product launches, which makes up 79% of new products with Omega-3 nutrients.

Canada saw the most new product launches, with a total of 1,807, where most of the country products came from the food category. The United States was the second-largest country to introduce the most new products with Omega-3, with a total of 529 products, which predominately came from the pet food category. The third largest country is the United Kingdom with a total of 504 new products, predominantly from the food category. In total, these top three countries make up 35% of the new product launches with Omega-3.

**New Products with Omega-3 by Top Five Markets and Category
From January 2010 to December 2015**

Country	Food	Pet Food	Drinks	Total Products by Country
Total Products by Category	6,515	1,484	219	8,218
Canada	1,603	168	36	1,807
United States	77	414	38	529
UK	397	101	6	504
France	456	20	11	487
Australia	373	24	3	400
Other	3,609	757	125	4,491

Source: Mintel GNPD, 2016

NEW FOOD PRODUCTS WITH OMEGA-3

From January 2010 to December 2015, the major subcategories included: fish products with 2,238 new product launches, oils with 632, margarine and other blends with 330 and bread & bread products with 313 product launches with Omega-3.

Canada launched the most significant number of food products with Omega-3, covering a broad range of fish, bread, and poultry products. Meanwhile France (2nd largest) and the United Kingdom (3rd largest) launched a modest number of new fish, oils, and margarine and other blends products.

A total of 6,515 new food products were launched between the duration of January 2010 to December 2015. Since 2010 the launches of Omega-3 food products has seen a steady increase until 2014, where it peaked at 1,474 and slightly dropped in 2015 to 1,417 products. During the period of 2012 and 2014, there was a total 72% increase in new product launches.

Canada had the most launches with 1,603 products. The highest number of new food products with Omega-3 was introduced in 2014 (425). France (the second-largest) also saw an increase in new food launches, peaking at 94 products in 2014. Meanwhile the United Kingdom (third-largest) saw a decrease in new food product launches in 2014 after peaking at 2013 with 77 food product launches.

In Canada, Sobeys had the most launches, with 170 new food products. Other companies, such as Loblaw's and Weston Bakeries, were also active with 112 and 59 product launches within the food category. In France, Lesieur, Monoprix, and Scamark were the top three companies to launch the most food products. Meanwhile in the United Kingdom, Waitrose, Unilever, and Tesco were the top companies to launch new food products with Omega-3 nutrients.

The most common claims used on newly introduced products containing Omega-3 nutrients were *No Additives/Preservatives*, *Ethical - Environmentally Friendly Package*, and *Low/No/Reduced Allergen*. More than 4,000 products carried these claims. Overall, the majority of the 20 claims were related to



health, lifestyle, ethical and environmental. There were a few claims aimed at specific consumer groups such as babies and toddlers (0-4).

**New Food Products with Omega-3 by Major Subcategories and Top Five Markets
From January to December 2015**

Country	Sub-Category	Number of Products
World Total	Fish Products	2,238
	Oils	632
	Margarine & Other Blends	330
	Bread & Bread Products	313
	Growing Up Milk (1-4 years)	147
	Other	2,855
Canada	Fish Products	274
	Bread & Bread Products	247
	Poultry Products	82
	Meat Products	81
	Cold Cereals	59
	Other	860
France	Fish Products	197
	Oils	51
	Margarine & Other Blends	24
	Baby Savoury Meals & Dishes	17
	Meat Substitutes	14
	Other	153
UK	Fish Products	230
	Margarine & Other Blends	41
	Oils	26
	Baby Savoury Meals & Dishes	14
	Mayonnaise	13
	Other	73
Australia	Fish Products	222
	Oils	18
	Prepared Meals	14
	Margarine & Other Blends	11
	Eggs & Egg Products	10
	Other	98
Mexico	Fish Products	118
	Oils	36
	Mayonnaise	20
	Soy Based Drinks	10
	Eggs & Egg Products	9
	Other	60

Source: Mintel GNPD, 2016



**New Food Products with Omega-3 by Top 5 Markets,
From January 2010 to December 2015**

Country	2010	2011	2012	2013	2014	2015	Total Products by Market
Total Products by Year	718	833	859	1,214	1,474	1,417	6,515
Canada	158	219	165	294	425	342	1,603
France	51	69	76	81	94	85	456
UK	56	69	64	77	58	73	397
Australia	55	39	46	59	99	75	373
Mexico	17	20	29	57	59	71	253
Other	381	417	479	646	739	771	3,433

Source: Mintel GNPD, 2016

**New Food Products with Omega-3 by Major Companies in Top Five Markets
From January 2010 to December 2015**

Country	Company	Number of Products
Canada	Sobeys	170
	Loblaws	112
	Weston Bakeries	59
	Multi-Marques	43
	High Liner Foods	36
France	Lesieur	34
	Monoprix	19
	Scamark	15
	Labeyrie	14
	Intermarché	13
UK	Waitrose	48
	Unilever	40
	Tesco	24
	Young's	24
	Marks & Spencer	20
Australia	Woolworths	45
	Simplot	40
	Coles Supermarkets	36
	Safcol	26
	Aldi	18
Mexico	Pescados Industrializados	33
	Marindustrias	20
	McCormick	15
	Procesamiento Especializado de Alimentos	13
	Wal-Mart	9

Source: Mintel GNPD, 2016



**New Food Products with Omega-3 by Top 20 Claims,
From January 2010 to December 2015**

Claim	Number of Products
No Additives/Preservatives	1,588
Ethical - Environmentally Friendly Package	1,348
Low/No/Reduced Allergen	1,248
Gluten-Free	1,029
Ethical - Environmentally Friendly Product	887
Low/No/Reduced Transfat	837
Kosher	825
Ease of Use	720
Cardiovascular (Functional)	664
Other (Functional)	645
Organic	638
Ethical - Animal	634
Not Specified	627
Low/No/Reduced Fat	623
Halal	588
Low/No/Reduced Cholesterol	569
Babies & Toddlers (0-4)	560
Microwaveable	509
Low/No/Reduced Saturated Fat	500
Brain & Nervous System (Functional)	484

Source: Mintel GNPD, 2016

*Note: The total number of claims does not equal the total number of products, as a product may have more than one claim.

NEW DRINK PRODUCTS WITH OMEGA-3

From January 2010 to December 2015, the major of drink subcategories included: Meal Replacements & Other Drinks with 95 new product launches, Juice with 39, and Nectars with 39 product launches with Omega-3.

The United States launched the most drink products; with a total of 38 drink products with Omega-3, covering a broad range of juice drinks, other beverages, and sports and energy drinks. Closely behind is Canada, with 36 new product launches within the juice drinks and other beverages category. Meanwhile the Netherlands launched 15 new products mainly from the other beverages subcategory.

A total of 219 new drink products were launched between the duration of January 2010 to December 2015. Since 2013, the launches of Omega-3 drink products has seen a steady increased till 2015, where it continued to peak at 87 products in 2015.

The United States had the largest most launches with 38 products. The highest number of new drink product with Omega-3 products was introduced in 2015 (87). Canada (the second-largest) also saw an increase in new drink launches, peaking at 19 products in 2015. Meanwhile the Netherlands (third-



largest) saw a decrease in new drink product launches in 2015 after peaking at 2014 with 9 drink product launches.

In the United States, Mamma Chia had the most launches, with 17 new drink products. Other companies, such as Sambazon, Drink Chia, and Sequel Naturals, were also active with 7 and 4 product launches within the drink category. In Canada, Raw Material Juice Company, and Mamma Chia were the top two companies to launch the most drink products. Meanwhile in the Netherlands, Nestlé was the top company to launch new drink products with Omega-3 nutrients.

The most common claims used on newly introduced products containing omega-3 nutrients were low/no/reduced allergen, gluten-free, and antioxidant. Overall, the majority of the 20 claims were related to health, lifestyle, ethical and environmental.

**New Drink Products with Omega-3 by Major Subcategories and Top Five Markets
From January to December 2015**

Country	Category	Number of Products
Total Products		219
USA	Subtotal	38
	Juice Drinks	16
	Other Beverages	12
	Sports & Energy Drinks	8
	Water	1
	RTDs	1
Canada	Subtotal	36
	Juice Drinks	30
	Other Beverages	6
Netherlands	Subtotal	15
	Other Beverages	14
	Juice Drinks	1
South Africa	Subtotal	14
	Other Beverages	8
	Juice Drinks	6
Belgium	Subtotal	11
	Other Beverages	11
Other	Subtotal	105
	Other Beverages	51
	Juice Drinks	44
	Hot Beverages	6
	RTDs	4

Source: Mintel GNPD, 2016



**New Drink Products with Omega-3 by Top 5 Markets,
From January 2010 to December 2015**

Country	2010	2011	2012	2013	2014	2015	Total by Market
Total Products by Year	13	15	11	41	52	87	219
USA	3	4	4	12	5	10	38
Canada	3	3	3	6	2	19	36
Netherlands	0	0	1	1	9	4	15
South Africa	1	1	0	5	5	2	14
Belgium	0	0	0	0	0	11	11
Other	6	7	3	17	31	41	105

Source: Mintel GNPD, 2016

**New Drink Products with Omega-3 by Major Companies in Top Five Markets
From January 2010 to December 2015**

Country	Company	Number of Products
USA	Mamma Chia	17
	Sambazon	7
	Drink Chia	4
	Sequel Naturals	4
	Ahhmigo	1
Canada	Raw Material Juice Company	13
	Mamma Chia	4
	Cocos Pure Beverage	2
	Loblaws	2
	Minute Maid	2
Netherlands	Nestlé	11
	Acaimania	1
	Naturya	1
	Nestlé HealthCare Nutrition	1
	Vita-Plus	1
South Africa	Globalfruit Indústria e Comércio	3
	SOLAL Technologies	3
	Future Life Health Products	2
	Mamma Chia	2
	USN	2
Belgium	Nestlé	11

Source: Mintel GNPD, 2016



**New Drink Products with Omega-3 by Top 20 Claims,
From January 2010 to December 2015**

Claim	Number of Products
Low/No/Reduced Allergen	135
Gluten-Free	125
Other (Functional)	77
Antioxidant	69
GMO-Free	57
No Additives/Preservatives	56
Low/No/Reduced Sugar	55
Organic	55
Kosher	51
No Animal Ingredients	47
Vegan	46
Ethical - Environmentally Friendly Package	43
High/Added Fiber	36
High Protein	34
Ethical - Charity	29
Cardiovascular (Functional)	24
Ease of Use	23
Bone Health	22
Brain & Nervous System (Functional)	22
Low/No/Reduced Lactose	22

Source: Mintel GNPD, 2016

***Note:** The total number of claims does not equal the total number of products, as a product may have more than one claim.

NEW PET FOOD PRODUCTS WITH OMEGA-3

From January 2010 to December 2015, the major subcategories included: dog food dry with 638 new pet food product launches, followed by, cat dry with 342, and dog snacks and treats 307.

The United States launched the most number of pet food products with Omega-3, covering a variety of dry dog and cat dry food. Meanwhile Canada (2nd largest) and the Germany (3rd largest) launched a modest number of new pet food products.

A total of 1,484 new pet food products were launched between the duration of January 2010 to December 2015. Throughout the five year period there was a continuous fluctuation in the number of pet food launches containing Omega-3, with the most product launched in 2014 at 438 products while the lowest was in 2010 at 123 products.

The United States had the largest most launches with 414 products. The highest number of new pet food product with Omega-3 was introduced in 2014 (103). Canada (the second-largest) and Germany (third-largest) also peaked at 65 and 61 new pet food product launches in 2014.

In the United States, Blue Buffalo had the most launches, with 48 new pet food products. Other companies, such as WellPet, Dick Van Patten's Natural Balance Pet Foods, and Hill's Pet Nutrition, were



also active with 22, 20, and 19 product launches within the pet food category. In Canada, Blue Buffalo, Procter & Gamble and Nature's Variety were the top three companies to launch the most pet food products. Meanwhile in the Netherlands, Mars was the top company to launch new pet food products with Omega-3.

The most common claims used on newly introduced products containing Omega-3 nutrients were skin and coat (functional pet), no additives/preservatives, and pet - adult. Overall, the majority of the 20 claims were related to health.

**New Pet Food Products with Omega-3 by Major Subcategories and Top Five Markets
From January to December 2015**

Country	Category	Number of Products
Total Products		1,484
USA	Dog Food Dry	185
	Cat Food Dry	89
	Dog Snacks & Treats	86
	Dog Food Wet	26
	Cat Food Wet	20
	Other	8
Canada	Dog Food Dry	92
	Dog Food Wet	34
	Dog Snacks & Treats	28
	Cat Food Dry	11
	Cat Food Wet	2
	Other	1
Germany	Cat Food Dry	41
	Dog Food Dry	38
	Dog Snacks & Treats	23
	Cat Food Wet	11
	Cat Snacks & Treats	10
	Other	4
UK	Dog Snacks & Treats	37
	Dog Food Dry	26
	Cat Food Dry	23
	Cat Snacks & Treats	10
	Dog Food Wet	3
	Other	2
Brazil	Dog Food Dry	58
	Cat Food Dry	26
	Dog Snacks & Treats	4
	Cat Snacks & Treats	2
	Dog Food Wet	1
	Other	1

Source: Mintel GNPD, 2016



**New Pet Food Products with Omega-3 by Top 5 Markets,
From January 2010 to December 2015**

Country	2010	2011	2012	2013	2014	2015	Total by Market
Total Products by Year	123	145	225	195	438	358	1,484
USA	41	47	73	64	103	86	414
Canada	16	12	12	20	65	43	168
Germany	2	9	14	21	61	20	127
UK	17	16	11	5	25	27	101
Brazil	7	5	11	20	29	20	92
Other	40	56	104	65	155	162	582

Source: Mintel GNPD, 2016

**New Pet Food Products with Omega-3 by Major Companies in Top Five Markets
From January 2010 to December 2015**

Country	Company	Number of Products
USA	Blue Buffalo	48
	WellPet	22
	Dick Van Patten's Natural Balance Pet Foods	20
	Hill's Pet Nutrition	19
	Breeder's Choice	18
Canada	Blue Buffalo	18
	Procter & Gamble	16
	Nature's Variety	14
	Simply Nourish	13
	Authority Pet Food	12
Germany	Mars	20
	Matina	14
	Fressnapf	8
	REWE Markt	8
	Nestlé Purina PetCare	6
UK	Mars	13
	Nestlé Purina PetCare	10
	Mars Petcare	9
	Lily's Kitchen	7
	Pet Munchies	7
Brazil	Mogiana Alimentos	13
	Manfrim	11
	Adimax Indústria e Comércio de Alimentos	10
	Nestlé	8
	Grandfood	7

Source: Mintel GNPD, 2016



**New Pet Food Products with Omega-3 by Top 20 Claims,
From January 2010 to December 2015**

Claim	Number of Products
Skin & Coat (Functional Pet)	809
No Additives/Preservatives	796
Pet - Adult	679
Digestion & Urinary Tract (Functional Pet)	620
Low/No/Reduced Allergen	591
Immune System (Functional Pet)	523
Vitamin/Mineral Fortified	511
Joints, Bones & Muscles (Functional Pet)	506
Other (Functional Pet)	474
Teeth & Tartar Prevention (Functional Pet)	373
Convenient Packaging	332
Premium	328
Gluten-Free	240
Pet - Junior	212
Heart & Cardiovascular System (Functional Pet)	189
Prebiotic	182
Eyesight (Functional Pet)	166
High Protein	151
Social Media	145
Brain & Nervous System (Functional Pet)	142

Source: Mintel GNPD, 2016

***Note:** The total number of claims does not equal the total number of products, as a product may have more than one claim.

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RESOURCES

Mintel Global New Products Database, 2016



OMEGA-3 IN FOOD, DRINKS, AND PET FOOD

Global Analysis Report

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