



2025 Member Survey Summary

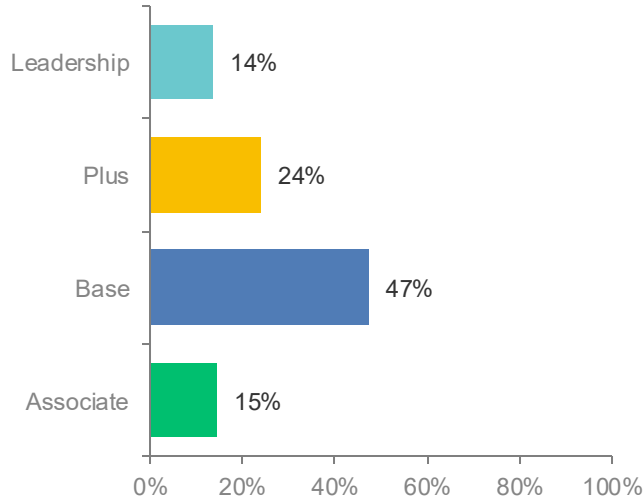
August 4, 2025

Key Survey Takeaways

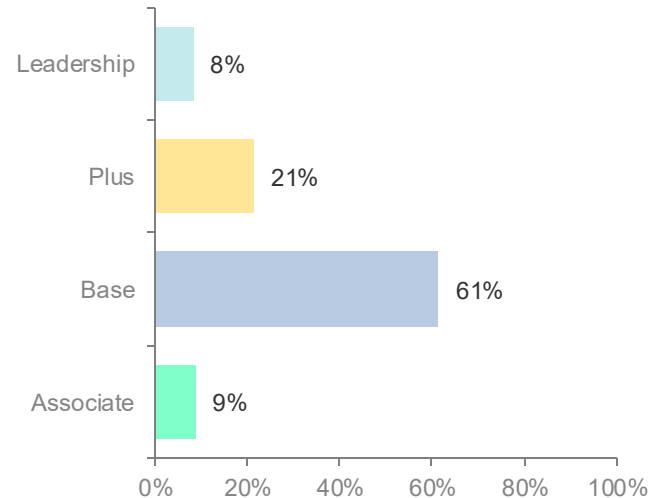
1. GOED completed its annual member survey between May 14 and July 22, 2025. In that time, **116 respondents** took the survey — a **6% increase year-on-year**.
2. Respondent demographics **matched the general composition of the GOED membership** in terms of geography, value chain position and member levels.
3. 92% of respondents were **satisfied with their membership** and 53% reported that **their satisfaction has increased** over the past year.
4. In terms of most valuable offerings, respondents rated (1) **interaction with the GOED team**, (2) **guidance on technical topics like quality issues and test methods** and (3) PR “**crisis management**” as the top three.
5. Members are especially concerned about **supply chain** and **regulatory issues**.

Most survey respondents were from **the Base level** — GOED's largest member level.

Percentage of **survey respondents** by member level



Percentage of current **GOED member companies** by member level



More than half of survey respondents came from **Norway, the US, China, Canada, Chile, Germany** and **Peru**.

The top countries of respondents roughly match the top countries of GOED members by HQ country.

Count of survey respondents by top countries

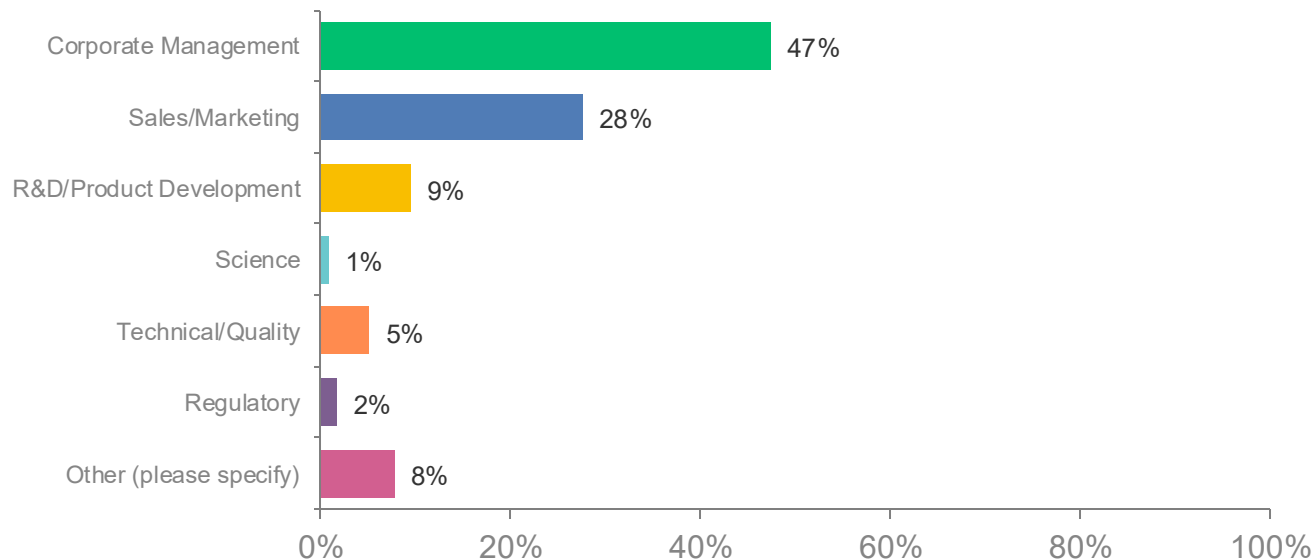
Country	Count
Norway	14
USA	10
China	8
Chile	7
Germany	7
Peru	6

Count of GOED member companies by top countries

Country	Count
USA	38
China	21
Norway	19
Peru	11
Canada	10
Chile	8

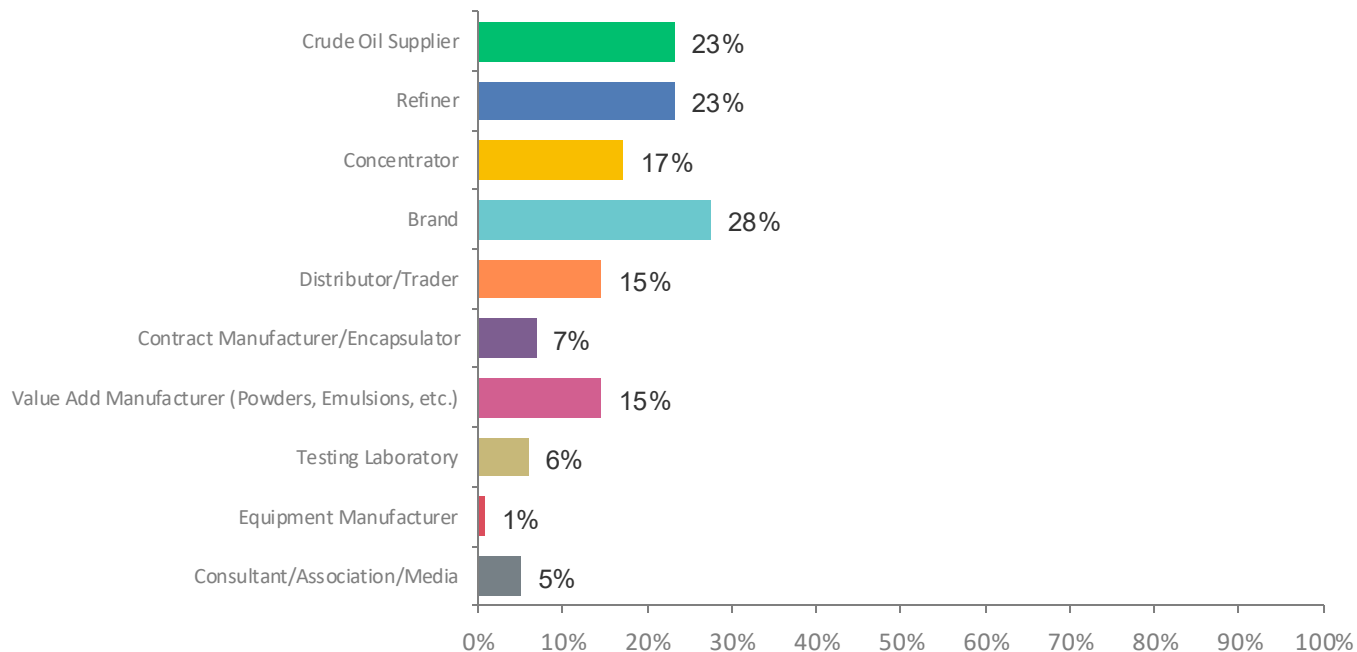
Most respondents were **corporate management** or **sales and marketing execs.**

Question: "What is your job function? Select the main/best fit." (n=116)



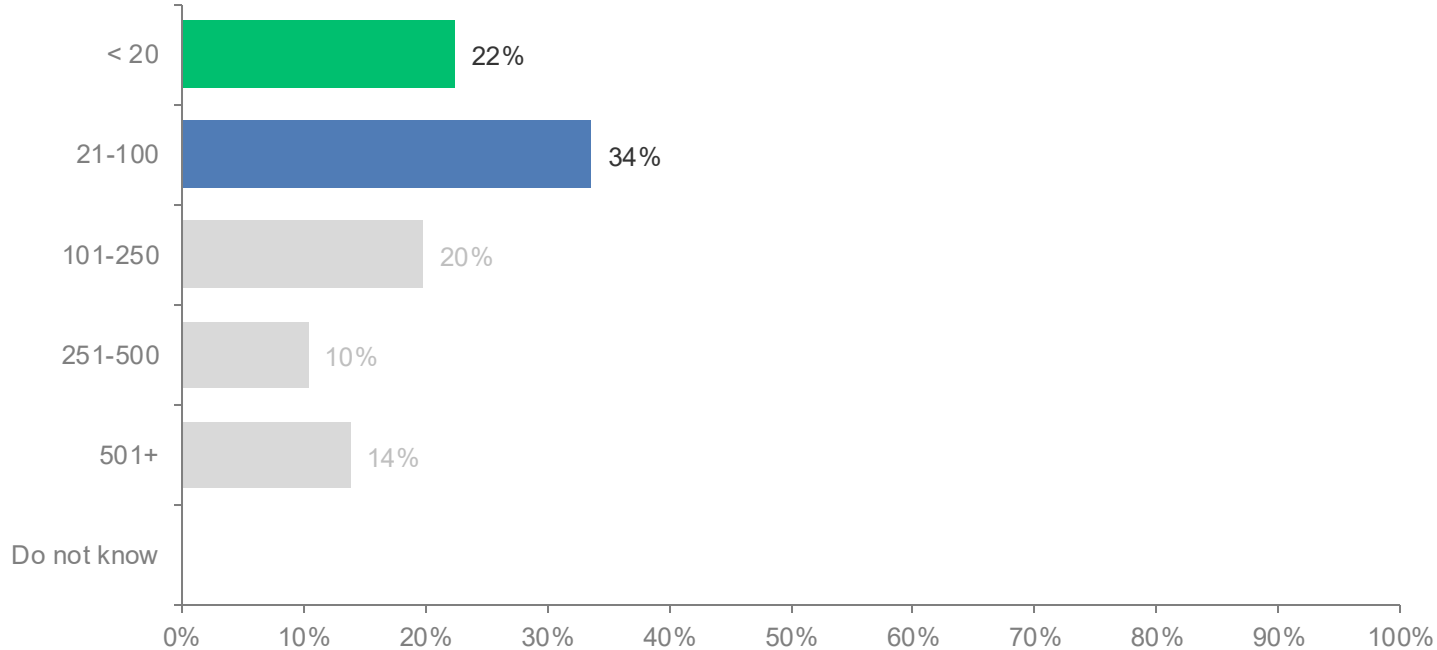
Respondents came from **all key segments** of the supply chain.

Question: "How do you identify your company? Please choose its main activity." (n=116)

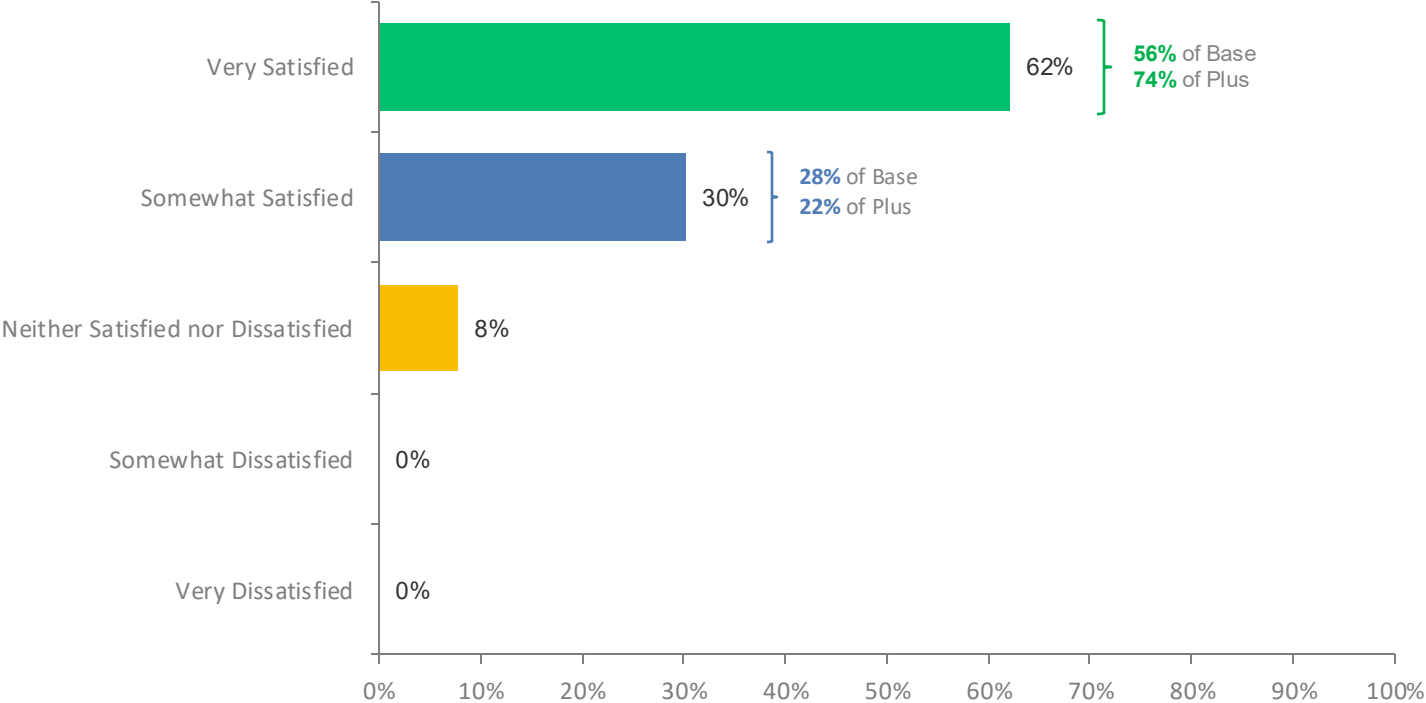


Almost 60% of companies were **small to medium-size companies**.

Question: How many employees are in your company or omega-3 division? (n=116)

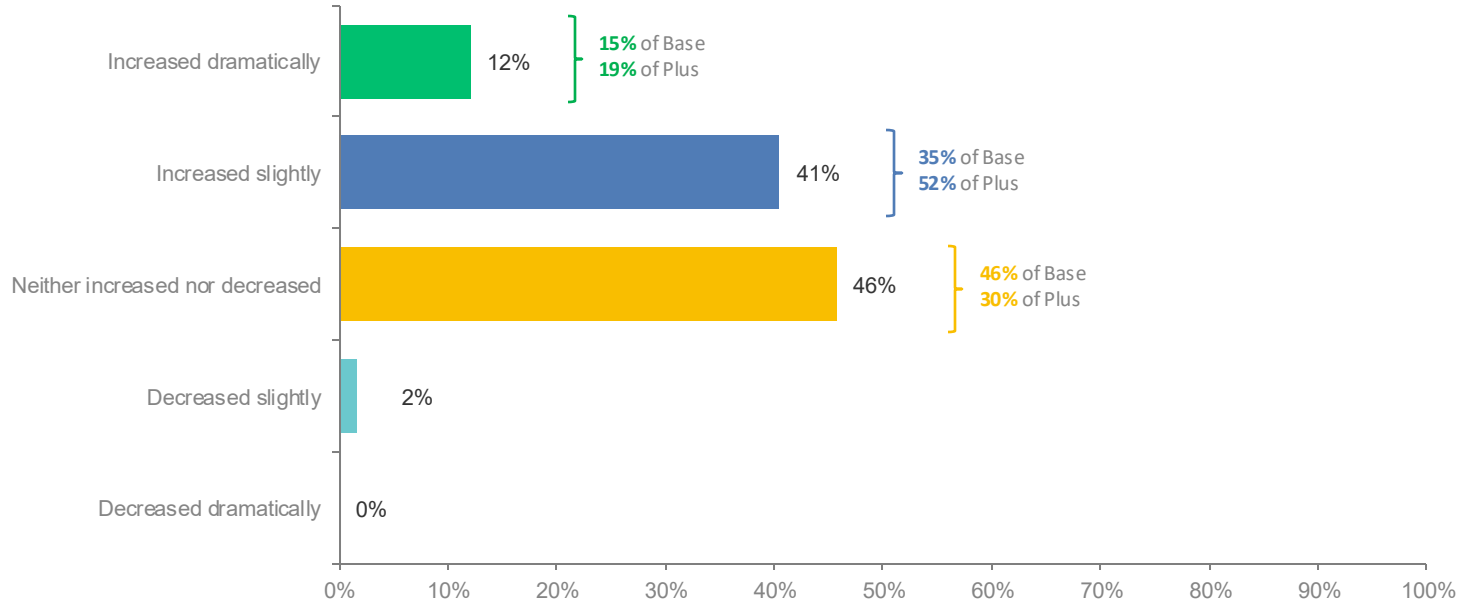


Most respondents (92%) were **satisfied** with their GOED membership.



53% of respondents reported **an increase in satisfaction** over the past year.

Prompt: “Over the past year, my satisfaction with our GOED membership has —” (n=116)



Our core work aligns with what members value most.

Nearly all top-rated activities are long-standing GOED initiatives that benefit from the full weight of our experience and skills.

Three top-20 items were launched since last year's survey.

#	GOED Activity	# who said this was relevant to their work	Respondents' total score (low value=1 pts, some value =2 pts, high value =3pts)	"Perfect" Score (# respondents × 3 points for "high value")	How close this item got to a perfect score ↓
1	Asking GOED staff questions on scientific, technical, and regulatory topics	111	302	333	91%
2	Guidance on technical topics like quality issues and test methods	106	288	318	91%
3	"Crisis management," like responding to bad press, negative scientific outcomes	102	279	306	91%
4	Advocacy (re: quality standards, recommended intakes and health claims worldwide)	104	281	312	90%
5	Ingredient Market Report	106	282	318	89%
6	GOED Regulatory Affairs Committee	101	269	303	89%
7	GOED Monograph/importance of GOED's credibility and emphasis on quality	105	281	315	89%
8	GOED staff presenting at scientific conferences and relationship-building with EPA and DHA researchers/publishing scientific articles in peer-reviewed journals	109	289	327	88%
9	GOED news alerts and weekly GOED Current newsletter	114	298	342	87%
10	GOED Exchange biennial conference	99	259	297	87%
11	GOED Science Committee	106	276	318	87%
12	GOED Technical Committee	103	269	309	87%
13	GOED Position Statement on Fish & Algae Oil	104	267	312	86%
14	Global Omega-3 Navigator — a new resources detailing global quality standards, composition and health claims and intake recommendations	98	251	294	85%
15	Hosting the Omega-3 Resource Pavilion at trade shows	94	236	282	84%
16	Educational presentations and webinars	109	276	327	84%
17	Finished Product Report	102	254	306	83%
18	Supporting the growth of Global Omega-3 Day	101	253	303	83%
19	Mineral Oil Hydrocarbons Resource Page	95	235	285	82%
20	Focus on contaminants	95	235	285	82%

Of the member services activities, respondents assigned the most value to **our staff interactions** and **newsletters**.

Member Services Activity	How close this item got to a perfect score (See slide 10 for a score explanation) ↓
Asking GOED staff questions on scientific, technical, and regulatory topics	91%
GOED News alerts and weekly GOED Current newsletter	87%
GOED Exchange biennial conference	87%
Hosting the Omega-3 Resource Pavilion at trade shows	84%
Educational presentations and webinars	84%
Member-to-member/networking introductions	79%
Member Portal on the GOED website	79%
Dongtai (Chinese version of The GOED Current)	73%
Sales leads in the newsletter	66%

In the science area, respondents' top two most-valued activities were **scientific publishing/relationship-building** and the **Science Committee**.

GOED Activity	How close this item got to a perfect score (See slide 10 for a score explanation) ↓
GOED staff presenting at scientific conferences and relationship-building with EPA and DHA researchers + publishing scientific articles in peer-reviewed journals	88%
GOED Science Committee	87%
GOED Position Statement on Fish & Algae Oil	86%
Clinical Study Database (CSD) science-based reports (e.g. eye health, skin health)	81%
GOED Position Statement on Atrial Fibrillation	79%

Within our regulatory and technical activities, respondents' top two items were **technical guidance** and **advocacy for favorable global omega-3 regulations**.

GOED Activity	How close this item got to a perfect score	(See slide 10 for a score explanation)
Guidance on technical topics like quality issues and test methods	91%	Within the top 10 activities overall
Advocacy (re: quality standards, recommended intakes and health claims worldwide)	90%	
GOED Regulatory Affairs Committee	89%	
GOED Monograph/importance of GOED's credibility and emphasis on quality	89%	
GOED Technical Committee	87%	Within the top 15 activities overall
Global Omega-3 Navigator — a new resources detailing global quality standards, composition and health claims and intake recommendations	85%	
Mineral oil hydrocarbons resource page	82%	
Work monitoring and studying contaminants	82%	

In the communications area, respondents' top two most valued activities were **PR crisis management** and **supporting the growth of Global Omega-3 Day**.

GOED Activity	How close this item got to a perfect score (See slide 10 for a score explanation) ↓
"Crisis management," like responding to bad press, negative scientific outcomes	91%
Supporting the growth of Global Omega-3 Day	83%
GOED Communications Committee	81%
GOED Proud Member logo	81%
Quarterly newsletter to brands and marketing teams	81% } New initiative
Presenting at health practitioner conferences	79%
Consumer tools developed by GOED for member use (e.g., communication calendar and toolkit, infographics)	78%
Healthcare professional tools developed by GOED for member use	77%

In the **market intelligence** section, respondents' top valued activity was our annual **Ingredient Market** and **Finished Product Reports**.

GOED Activity	How close this item got to a perfect score ↓
Ingredient Market Report	89%
Finished Product Report	83%
Consumer Survey Data Explorer	81%

In the **sustainability** area, respondents found the **Sustainability Committee** and **GOED's industry analyses** to be valuable activities.

GOED Activity	How close this item got to a perfect score ↓
GOED Sustainability Committee	80%
Omega-3 industry sustainability "Horizon Scan" report	80%
Omega-3 industry sustainability materiality assessment	80%

Survey Highlights: Respondents from specific member levels assigned certain activities “high value” more often.

Leadership

respondents gave the highest value scores to:

1. PR “Crisis Management”
2. GOED Exchange
3. Global Omega-3 Day Growth

Plus

respondents gave the highest value scores to:

1. Global advocacy for standards and claims
2. Guidance on technical topics
3. *The GOED Current* newsletter

Base

respondents gave the highest value scores to:

1. Asking GOED staff questions
2. PR “Crisis Management”
3. Guidance on technical topics

Associate

respondents gave the highest value scores to:

1. Asking GOED staff questions
2. GOED Science Committee
3. GOED Technical Committee

When asked about **projects GOED could pursue**, respondents offered:

Supply Chain (Resilience + Market Intel)

- Diversifying and future-proofing omega-3 supply via sustainable sourcing
- Promoting companies in other geographies/other oil sources (besides Peruvian anchovy)
- Crude fish oil supply news updates and additional crude oil market segmentation data
- Oil refinery joint ventures
- Advocacy against faulty data from interest groups in fishing and market

Technical and Regulatory Projects

- Increased emphasis on attributes beyond TOTOX
- Accurate methods to measure acid, peroxide, anisidine and TOTOX values in flavored products
- Calculation methods and updated guidelines under evolving China-U.S. tariff policies
- Updates on fish oil marketing lawsuits
- Compiling indication-age-life stage specific intake recommendations
- Advocacy for recommended daily intake values in various countries.

When asked about **projects GOED could pursue**, respondents offered:

Sustainability

- Circular economy initiatives
- Monitoring and challenging unethical/illegal flows of raw fish oil

Research and Development

- Next-gen delivery systems
- Equipment and new technologies in omega-3 production
- Innovation in omega-3 phospholipids
- Nutritional value of side streams
- Clinical data for emerging omega-3 benefits

Consumer/Science/Industry Outreach

- GOED educational webinar or e-learning module
- Engagement with scientific influencers for awareness and press
- Infographics and marketing materials in Hebrew
- Increased networking, PR, lobbying and global KOL relations
- Establishing an omega-3 advisory board
- Innovation rounds and continual brand-supplier connections.

When asked about **general industry areas of concern**, respondents stated:

Supply Chain

- False labeling of oils (e.g. blending dubious and high-quality sources; algal + fish oils misrepresented)
- Low-priced oils flooding the market
- Overall supply of fish oil; need for more fisheries to qualify for human consumption
- Fish oil prices and quotas versus other sources

Regulatory

- MOSH & MOAH upcoming regulation in Europe
- Regulatory compliance: contaminants, stricter thresholds
- Misrepresentation of country of origin
- Need for more advocacy around country-specific legal barriers (e.g. EU sanitary rules)
- Market regulation/studies to support new applications
- Need for a Dietary Reference Intake (DRI)

Communications

- Misleading claims about one type of oil being superior
- Ensuring consumer understanding of omega-3 importance in daily health
- Negative perception of fish oil (e.g. safety, sustainability)

Sustainability

- Ocean pollution's real and perceived impact on fish oil safety
- Misconceptions around sustainability of fish vs. algal oils
- Lack of biodiversity considerations in fish oil LCAs

Technical

- Stricter contaminant thresholds affecting production
- Technical aspects of blending, extraction and oil verification