

# **Global Fishery By-Products Market Size Study and Forecast by Type (Protein & Protein Derivative, Fish Oil, Bioactives & Specialty Compound), Source (Marine, Aquaculture), End-user Industry (Food & Beverage, Animal Feed, Agriculture), and Regional Forecasts 2026-2035**

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## **Abstracts**

The fishery by-products market comprises the commercial utilization and processing of residual materials generated during fish harvesting and seafood processing, including heads, skins, bones, viscera, and trimmings. These by-products are transformed into value-added outputs such as protein & protein derivatives, fish oil, and bioactives & specialty compounds for use across food & beverage, animal feed, and agriculture industries. The ecosystem spans fishing companies, aquaculture operators, rendering and extraction facilities, ingredient manufacturers, nutraceutical companies, feed producers, and agricultural input suppliers.

In recent years, the market has transitioned from a waste-management-centric model to a circular economy-driven value recovery system. Increasing focus on resource optimization, sustainability, and zero-waste processing has elevated fishery by-products from low-margin feed ingredients to high-value nutritional and functional components. Technological advancements in enzymatic hydrolysis, cold extraction, and bio-refining have enabled the isolation of collagen peptides, omega-3 concentrates, and specialty bioactives with pharmaceutical and nutraceutical applications. Over the forecast period 2026-2035, the industry is expected to witness structural growth driven by rising global protein demand, aquaculture expansion, and the integration of sustainability principles into food and agricultural supply chains.

## Key Findings of the Report

Market Size (2024): USD 24.55 billion

Estimated Market Size (2035): USD 53.29 billion

CAGR (2026-2035): 7.30%

Leading Regional Market: Asia Pacific

Leading Segment: Protein & Protein Derivative (by Type)

## Market Determinants

### Expansion of Global Protein Consumption

Rising population, urbanization, and growing middle-class incomes are driving increased demand for affordable and high-quality protein sources. Fishery by-products, particularly protein derivatives, serve as critical inputs for animal feed and functional food formulations. Their cost-efficiency and high nutritional value enhance commercial attractiveness across multiple value chains.

### Circular Economy and Waste Valorization Initiatives

Sustainability mandates and corporate ESG commitments are accelerating the shift toward full resource utilization in seafood processing. Converting processing waste into marketable outputs not only improves profitability but also reduces environmental footprint and disposal costs, strengthening long-term industry resilience.

### Technological Advancements in Bio-Extraction

Innovations in hydrolysis, fractionation, and purification technologies have unlocked higher-margin applications such as collagen peptides, omega-3 concentrates, and specialty bioactives. These advancements enable producers to access nutraceutical and pharmaceutical segments, enhancing revenue diversification and margin expansion.

### Growth of Aquaculture as a Stable Raw Material Source

The rapid expansion of aquaculture provides a consistent and scalable source of raw material for by-product processing. Compared to wild marine sources, aquaculture offers supply predictability, which supports long-term contractual arrangements and industrial-scale processing investments.

### Regulatory and Quality Compliance Constraints

Stringent food safety regulations, traceability requirements, and quality certification standards increase compliance costs. Variability in raw material quality and seasonality in marine fisheries may also affect processing efficiency and pricing stability, posing operational challenges.

### Opportunity Mapping Based on Market Trends

#### High-Value Nutraceutical and Functional Ingredients

Bioactives & specialty compounds derived from fish collagen, gelatin, and omega-3 fatty acids present significant growth opportunities. Premiumization in health supplements and functional foods supports higher margins and product differentiation strategies.

#### Integration with Sustainable Aquaculture Supply Chains

Partnerships between aquaculture farms and by-product processors can create vertically integrated value chains. Such models enhance traceability, optimize raw material utilization, and attract sustainability-linked financing.

#### Expansion in Emerging Agricultural Applications

Fish-derived hydrolysates and organic fertilizers are gaining traction as sustainable agricultural inputs. As demand for organic and regenerative farming practices increases, fishery by-products offer bio-based alternatives to synthetic fertilizers.

#### Product Innovation in Food & Beverage Applications

Protein isolates and marine oils are increasingly incorporated into fortified foods and beverages. Clean-label trends and demand for marine-based nutrition create opportunities for brand partnerships and consumer-facing product development.

## Key Market Segments

### By Type:

Protein & Protein Derivative

Fish Oil

Bioactives & Specialty Compound

### By Source:

Marine

Aquaculture

### By End-user Industry:

Food & Beverage

Animal Feed

Agriculture

## Value-Creating Segments and Growth Pockets

Protein & protein derivatives currently dominate the market due to their extensive application in animal feed and food processing. However, bioactives & specialty compounds are expected to grow at a faster pace, supported by rising demand for nutraceuticals and premium health ingredients.

From a source perspective, marine fisheries historically account for a larger share of raw material supply. Nevertheless, aquaculture-derived by-products are projected to expand more rapidly due to supply stability and scalability.

In terms of end-user industries, animal feed remains the largest revenue contributor,

driven by aquafeed and livestock nutrition demand. Conversely, food & beverage applications are anticipated to witness accelerated growth as marine-derived proteins and oils gain acceptance in fortified and functional consumer products.

## **Regional Market Assessment**

### North America

North America exhibits strong growth in high-value applications such as nutraceuticals and specialty ingredients. Advanced processing infrastructure and strict regulatory standards support premium product positioning and export potential.

### Europe

Europe's market is driven by circular economy policies, sustainable fishing regulations, and established aquaculture operations. Innovation in collagen extraction and omega-3 concentration strengthens the region's competitive positioning in specialty segments.

### Asia Pacific

Asia Pacific leads in both seafood production and consumption, providing abundant raw material supply. Rapid aquaculture expansion, growing feed demand, and increasing domestic protein consumption underpin regional dominance.

### LAMEA

LAMEA demonstrates emerging growth potential, particularly in Latin America's fishmeal and oil production hubs. Expansion of aquaculture in the Middle East and Africa further enhances regional supply capabilities and downstream integration prospects.

## **Recent Developments**

April 2024: A major seafood processor invested in an advanced bio-refinery facility to extract collagen peptides and omega-3 concentrates from fish waste, strengthening its move into high-margin nutraceutical segments.

November 2023: A strategic collaboration between an aquaculture operator and a rendering company was announced to develop integrated waste valorization

systems, improving supply chain efficiency and sustainability credentials.

July 2023: A fish oil producer expanded its refining capacity to meet growing demand from fortified food and dietary supplement manufacturers, reinforcing vertical integration strategies.

### Critical Business Questions Addressed

What is the long-term value creation potential in the fishery by-products market through 2035?

The report quantifies revenue growth and assesses structural drivers shaping industry expansion.

Which product types offer the most attractive margin profiles?

Segment analysis identifies opportunities in specialty bioactives and premium fish oil derivatives.

How will aquaculture expansion influence raw material supply dynamics?

The study evaluates the shift toward predictable and scalable aquaculture-based sourcing models.

What role does sustainability play in competitive positioning?

Insights highlight how waste valorization and ESG compliance impact stakeholder perception and financing access.

Which regional markets should stakeholders prioritize?

Comparative regional assessment outlines Asia Pacific's scale advantage and North America and Europe's innovation-led growth.

## **Beyond the Forecast**

The fishery by-products market is evolving into a strategic pillar of the global blue economy, transforming waste streams into high-value nutritional and functional assets.

Long-term growth will depend on technological sophistication, supply chain integration, and regulatory alignment with sustainability standards.

As consumer and investor expectations increasingly prioritize resource efficiency and environmental stewardship, companies that lead in bio-refining innovation and circular value chain development will define the competitive landscape beyond 2035.

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