

Global Fish Protein Isolates Market: Analysis By Form (Powder and Liquid), By Application (Food and Beverages, Pharmaceuticals and Nutraceuticals, Animal Nutrition and Others), By Region, Size and Trends with Impact of COVID-19 and Forecast up to 2029

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Abstracts

Fish protein isolates (FPIs) are highly purified proteins derived from fish, created by extracting and refining proteins from various fish species or by-products. This process involves solubilizing fish muscle proteins at an alkaline pH, precipitating them at their isoelectric point, and then drying to achieve a product with over 90% protein content. FPIs are rich in essential amino acids, low in fat and carbohydrates, and offer a sustainable method of utilizing fish by-products, thereby reducing waste in the seafood industry. They are extensively used in the food industry to enhance protein content and improve the texture and nutritional value of products like surimi, sausages, and protein supplements. The global fish protein isolates market was valued at US\$948.56 million in 2023, and is expected to be worth US\$1.34 billion in 2029.

Several trends are shaping the future of the fish protein isolates market. One notable trend is the focus on sustainability and ethical sourcing. As concerns about overfishing and environmental impact grow, companies are increasingly adopting sustainable fishing practices and seeking certifications such as Marine Stewardship Council (MSC) to appeal to eco-conscious consumers. Innovations in fish byproduct utilization are also gaining traction, with manufacturers exploring ways to extract protein from parts of the fish that are typically discarded, thus reducing waste and improving overall yield. Another emerging trend is the development of customized fish protein isolates for specific applications. Advances in processing technologies are enabling the creation of

FPIs with tailored functionalities, such as enhanced solubility for beverages or specific amino acid profiles for targeted nutritional benefits. This customization is driving innovation in product formulations and expanding the range of applications for FPIs in the food and nutrition sectors. The global fish protein isolates market is expected to grow at a CAGR of 5.82% over the years 2024-2029.

Market Segmentation Analysis:

By Form: The global fish protein isolates market by form can broadly be divided into two segments namely, Powder and Liquid. Powder fish protein isolates segment dominated the market in 2023 and is foreseen to grow at the fastest CAGR during the forecasted period. Fish protein isolates in powder form are highly popular due to their ease of use, long shelf life, and versatility. The powder form is particularly advantageous for its stability and convenience in transportation and storage. It can be easily incorporated into a wide range of food products, such as protein bars, supplements, meal replacements, and bakery items.

By Application: The global fish protein isolates market by application can broadly be divided into four segments namely, Food and Beverages, Pharmaceuticals and Nutraceuticals, Animal Nutrition and Others. Food and Beverages segment dominated the market in 2023. The Food and Beverages segment is a major application area for fish protein isolates. FPIs are valued for their high protein content and functional properties, making them ideal for enriching various food products such as meat analogs, dairy alternatives, soups, and sauces. The growth in this segment is driven by increasing consumer demand for high-protein diets and clean-label products. Health-conscious consumers are seeking natural and minimally processed ingredients, and FPIs fit this trend perfectly. Pharmaceuticals and nutraceuticals segment is expected to grow at the fastest CAGR during the forecasted period. The growth in this segment is driven by the increasing awareness of the health benefits associated with fish proteins, such as cardiovascular support, weight management, and anti-inflammatory effects. The aging global population and the rising prevalence of lifestyle-related diseases further propel demand for nutraceuticals containing FPIs.

By Region: In the report, the global fish protein isolates market is divided into five regions: Asia Pacific, North America, Europe, Latin America and Middle East & Africa. North America dominated the fish protein isolates market in 2023, driven by the increasing popularity of high-protein diets and the burgeoning demand for natural and sustainable food products. The US and Canada are key markets, with consumers showing a strong preference for clean-label and organic products. The growing health

and wellness trend, coupled with a significant rise in fitness and sports activities, is propelling the demand for protein supplements and functional foods that include fish protein isolates. The North American market is also characterized by a high level of product innovation, with companies developing new applications and formulations for fish protein isolates. The presence of advanced food processing industries and a strong retail network further supports market growth. Additionally, stringent regulations regarding food safety and quality are driving manufacturers to adopt high standards, which enhances consumer trust and market expansion.

Asia Pacific is the fastest-growing region for fish protein isolates. This growth is driven by several factors, including the region's substantial aquaculture industry, which provides a steady supply of raw materials. Countries like China, India, Japan, and Thailand are major producers and consumers of fish products, with a cultural preference for fish-based diets contributing to high demand. The rising middle class and increasing disposable incomes in these countries are boosting the consumption of health and wellness products, including protein supplements. Additionally, the trend towards healthy eating and fitness is gaining traction in urban areas, further driving the demand for fish protein isolates. Furthermore, government initiatives to support the seafood industry and improve food security are fostering market growth in this region.

China's fish protein isolates market is growing rapidly, fueled by the country's massive aquaculture industry and a cultural emphasis on fish consumption. The government's focus on food security and nutrition, along with investments in modernizing the food processing industry, supports market growth. The trend towards urbanization and busy lifestyles is boosting the demand for convenient, high-protein food options, such as ready-to-eat meals and snacks fortified with fish protein isolates.

Market Dynamics:

Growth Drivers: The market has been growing over the past few years, due to factors such as rising demand for protein-rich food products, rising consumer awareness of sustainable and natural products, technological advancements in fish protein isolates processing, growing popularity of functional foods and supplements, etc. In recent years, consumers have become increasingly concerned about the environmental impact of their food choices, seeking out products that are not only healthy but also sustainably sourced. Fish protein isolates, particularly those derived from by-products of the fishing industry, align well with this trend. By utilizing parts of the fish that might otherwise be discarded, these isolates help reduce waste and promote resource efficiency, appealing to environmentally conscious consumers. Furthermore, the preference for natural and

minimally processed foods has grown markedly. Consumers are scrutinizing ingredient lists more carefully, favoring products with clean labels free from artificial additives and preservatives.

Challenges: However, some challenges are also impeding the growth of the market such as rising vegan population and cost of production. The vegan population is rapidly increasing due to heightened consumer awareness about the health impacts of consuming animal products and concerns over the ethical and environmental consequences of animal agriculture. Millennials, in particular, are driving the demand for vegan products, drawn by their perceived health benefits. The increasing availability of vegan food options, including products featuring ingredients like pumpkin, avocado, tofu, and others, further supports this dietary shift.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as e-commerce growth, personalized nutrition, health and nutrition trends, rising demand in personal care industry and alternative proteins and flexitarian diets. E-commerce growth significantly impacts the fish protein isolates market by enhancing product accessibility and expanding consumer reach. As online retail platforms flourish, they offer a convenient shopping experience, allowing consumers to easily explore and purchase a variety of fish protein isolate products from the comfort of their homes. This accessibility is particularly beneficial for niche markets and specialized products, which may not be widely available in traditional brick-and-mortar stores. The global nature of e-commerce also enables manufacturers to reach a broader audience, including international markets, thereby driving market expansion.

Impact Analysis of COVID-19 and Way Forward:

The COVID-19 pandemic has significantly impacted the global fish protein isolates market. The pandemic has led to a decline in the demand for fish protein isolates due to the economic downturn and reduced consumer spending. Additionally, the pandemic has caused disruptions in the global supply chain, affecting the availability and quality of fish protein isolates. The lockdowns and travel restrictions have also hindered the transportation of fish protein isolates, further exacerbating the supply chain issues. Furthermore, the pandemic has increased consumer awareness of health and nutrition, leading to a growing demand for functional foods and supplements that incorporate fish protein isolates. Despite these challenges, the market is expected to recover as the global economy stabilizes and consumer preferences shift towards healthier options.

In the post-COVID scenario, the global fish protein isolates market is expected to

witness a resurgence driven by several factors. The pandemic has led to a shift in consumer preferences toward home-cooked meals and a greater emphasis on health and wellness. This has resulted in increased demand for fish protein isolates in the food and beverage industry, particularly in the form of powder, which is easily adaptable and nutritious.

Competitive Landscape:

The fish protein isolates market is characterized by intense competition, driven by a combination of established industry giants and innovative newcomers. This dynamic market environment is fueled by increasing consumer demand for high-quality, sustainable protein sources. Companies are leveraging cutting-edge technologies, strategic partnerships, and rigorous research and development to gain a competitive edge. Key players are continually enhancing their product offerings and expanding their global footprint through market initiatives, new product developments, and mergers and acquisitions. For example, in 2021, Biomega Group AS partnered with Quality Salmon to invest in Europe's largest salmon park in Sweden, highlighting a strategic move to broaden their market influence in Europe.

This competitive landscape is further intensified by a growing emphasis on health and wellness, sustainability, and technological advancements, compelling companies to innovate and differentiate themselves to capture market share and meet evolving consumer needs.

The key players of the global fish protein isolates market are:

PeterLabs Holdings Berhad
Colpex International SAC
Bio-Marine Ingredients Ireland Ltd
Soprop?che SA
Omega Protein Corporation
Advance International Inc.
Janatha Fish Meal & Oil Products
TripleNine Group A/S
Titan Biotech Limited
Copalis Industry

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Fish Protein Isolates: An Overview

2.2 Fish Protein Isolates Segmentation: An Overview

2.2.1 Fish Protein Isolates Segmentation

3. GLOBAL MARKET ANALYSIS

3.1 Global Fish Protein Isolates Market: An Analysis

3.1.1 Global Fish Protein Isolates Market: An Overview

3.1.2 Global Fish Protein Isolates Market by Value

3.1.3 Global Fish Protein Isolates Market by Form (Powder and Liquid)

3.1.4 Global Fish Protein Isolates Market by Application (Food and Beverages, Pharmaceuticals and Nutraceuticals, Animal Nutrition and Others)

3.1.5 Global Fish Protein Isolates Market by Region (North America, Asia Pacific, Europe, Latin America and Middle East and Africa)

3.2 Global Fish Protein Isolates Market: Form Analysis

3.2.1 Global Fish Protein Isolates Market By Form: An Overview

3.2.2 Global Powder Fish Protein Isolates Market By Value

3.2.3 Global Liquid Fish Protein Isolates Market By Value

3.3 Global Fish Protein Isolates Market: Application Analysis

3.3.1 Global Fish Protein Isolates Market By Application: An Overview

3.3.2 Global Food and Beverages Fish Protein Isolates Market By Value

3.3.3 Global Pharmaceuticals and Nutraceuticals Fish Protein Isolates Market By Value

3.3.4 Global Animal Nutrition Fish Protein Isolates Market By Value

3.3.5 Global Other Fish Protein Isolates Applications Market By Value

4. REGIONAL MARKET ANALYSIS

4.1 North America Fish Protein Isolates Market: An Analysis

4.1.1 North America Fish Protein Isolates Market: An Overview

4.1.2 North America Fish Protein Isolates Market by Value

4.1.3 North America Fish Protein Isolates Market by Region (The US, Canada and Mexico)

- 4.1.4 The US Fish Protein Isolates Market by Value
- 4.1.5 Canada Fish Protein Isolates Market by Value
- 4.1.6 Mexico Fish Protein Isolates Market by Value
- 4.2 Europe Fish Protein Isolates Market: An Analysis
 - 4.2.1 Europe Fish Protein Isolates Market: An Overview
 - 4.2.2 Europe Fish Protein Isolates Market by Value
 - 4.2.3 Europe Fish Protein Isolates Market by Region (UK, Germany, France, Italy and the Rest of Europe)
 - 4.2.4 Germany Fish Protein Isolates Market by Value
 - 4.2.5 United Kingdom Fish Protein Isolates Market by Value
 - 4.2.6 UK Fish Protein Isolates Market by Form (Powder and Liquid)
 - 4.2.7 UK Powder Fish Protein Isolates Market By Value
 - 4.2.8 UK Liquid Fish Protein Isolates Market By Value
 - 4.2.9 UK Fish Protein Isolates Market by Application (Food and Beverages, Pharmaceuticals and Nutraceuticals, Animal Nutrition and Others)
 - 4.2.10 UK Food and Beverages Fish Protein Isolates Market By Value
 - 4.2.11 UK Pharmaceuticals and Nutraceuticals Fish Protein Isolates Market By Value
 - 4.2.12 UK Animal Nutrition Fish Protein Isolates Market By Value
 - 4.2.13 UK Other Fish Protein Isolates Applications Market By Value
 - 4.2.14 France Fish Protein Isolates Market by Value
 - 4.2.15 Italy Fish Protein Isolates Market by Value
 - 4.2.16 Rest of Europe Fish Protein Isolates Market by Value
- 4.3 Asia Pacific Fish Protein Isolates Market: An Analysis
 - 4.3.1 Asia Pacific Fish Protein Isolates Market: An Overview
 - 4.3.2 Asia Pacific Fish Protein Isolates Market by Value
 - 4.3.3 Asia Pacific Fish Protein Isolates Market by Region (China, Japan, India, Australia and Rest of Asia Pacific)
 - 4.3.4 China Fish Protein Isolates Market by Value
 - 4.3.5 Japan Fish Protein Isolates Market by Value
 - 4.3.6 India Fish Protein Isolates Market by Value
 - 4.3.7 Australia Fish Protein Isolates Market by Value
 - 4.3.8 Rest of Asia Pacific Fish Protein Isolates Market by Value
- 4.4 Latin America Fish Protein Isolates Market: An Analysis
 - 4.4.1 Latin America Fish Protein Isolates Market: An Overview
 - 4.4.2 Latin America Fish Protein Isolates Market by Value
- 4.5 Middle East & Africa Fish Protein Isolates Market: An Analysis
 - 4.5.1 Middle East & Africa Fish Protein Isolates Market: An Overview
 - 4.5.2 Middle East & Africa Fish Protein Isolates Market by Value

5. IMPACT OF COVID-19

5.1 Impact of COVID-19

5.1.1 Impact of COVID-19 on Global Fish Protein Isolates Market

5.1.2 Post-COVID Scenario

6. MARKET DYNAMICS

6.1 Growth Drivers

6.1.1 Rising Demand for Protein-rich Food Products

6.1.2 Technological Advancements in Fish Protein Isolates Processing

6.1.3 Rising Consumer Awareness of Sustainable and Natural Products

6.1.4 Growing Popularity of Functional Foods and Supplements

6.2 Challenges

6.2.1 Rising Vegan Population

6.2.2 High Cost of Production

6.3 Market Trends

6.3.1 E-commerce Growth

6.3.2 Personalized Nutrition

6.3.3 Alternative Proteins and Flexitarian Diets

6.3.4 Health and Nutrition Trends

6.3.5 Rising Demand in Personal Care Industry

7. COMPETITIVE LANDSCAPE

7.1 Global Fish Protein Isolates Market: Competitive Landscape

7.2 Global Fish Protein Isolates Market: Product Offerings=

8. COMPANY PROFILES

8.1 PeterLabs Holdings Berhad

8.1.1 Business Overview

8.1.2 Operating Segments

8.2 Colpex International SAC

8.2.1 Business Overview

8.2.2 Business Strategy

8.3 Bio-Marine Ingredients Ireland Ltd.

8.3.1 Business Overview

8.4 Soprop?che SA

- 8.4.1 Business Overview
- 8.5 Omega Protein Corporation
 - 8.5.1 Business Overview
- 8.6 Advance International Inc.
 - 8.6.1 Business Overview
- 8.7 Janatha Fish Meal & Oil Products
 - 8.7.1 Business Overview
- 8.8 TripleNine Group A/S
 - 8.8.1 Business Overview
- 8.9 Titan Biotech Limited
 - 8.9.1 Business Overview
- 8.10 Copalis Industry
 - 8.10.1 Business Overview

12. LIST OF FIGURES

- Figure 1: Advantages of Fish Protein Isolates
- Figure 2: Fish Protein Isolates Segmentation
- Figure 3: Global Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)
- Figure 4: Global Fish Protein Isolates Market by Value; 2024-2029 (US\$ Billion)
- Figure 5: Global Fish Protein Isolates Market by Form; 2023 (Percentage, %)
- Figure 6: Global Fish Protein Isolates Market by Application; 2023 (Percentage, %)
- Figure 7: Global Fish Protein Isolates Market by Region; 2023 (Percentage, %)
- Figure 8: Global Powder Fish Protein Isolates Market By Value; 2019-2023 (US\$ Million)
- Figure 9: Global Powder Fish Protein Isolates Market By Value; 2024-2029 (US\$ Billion)
- Figure 10: Global Liquid Fish Protein Isolates Market By Value; 2019-2023 (US\$ Million)
- Figure 11: Global Liquid Fish Protein Isolates Market By Value; 2024-2029 (US\$ Million)
- Figure 12: Global Food and Beverages Fish Protein Isolates Market By Value; 2019-2023 (US\$ Million)
- Figure 13: Global Food and Beverages Fish Protein Isolates Market By Value; 2024-2029 (US\$ Million)
- Figure 14: Global Pharmaceuticals and Nutraceuticals Fish Protein Isolates Market By Value; 2019-2023 (US\$ Million)
- Figure 15: Global Pharmaceuticals and Nutraceuticals Fish Protein Isolates Market By Value; 2024-2029 (US\$ Million)
- Figure 16: Global Animal Nutrition Fish Protein Isolates Market By Value; 2019-2023 (US\$ Million)
- Figure 17: Global Animal Nutrition Fish Protein Isolates Market By Value; 2024-2029

(US\$ Million)

Figure 18: Global Other Fish Protein Isolates Applications Market By Value; 2019-2023

(US\$ Million)

Figure 19: Global Other Fish Protein Isolates Applications Market By Value; 2024-2029

(US\$ Million)

Figure 20: North America Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 21: North America Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 22: North America Fish Protein Isolates Market by Region; 2023 (Percentage, %)

Figure 23: The US Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 24: The US Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 25: Canada Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 26: Canada Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 27: Mexico Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 28: Mexico Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 29: Europe Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 30: Europe Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 31: Europe Fish Protein Isolates Market by Region; 2023 (Percentage, %)

Figure 32: Germany Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 33: Germany Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 34: United Kingdom Fish Protein Isolates Market by Value; 2019-2023

Figure 35: United Kingdom Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 36: UK Fish Protein Isolates Market by Form; 2023 (Percentage, %)

Figure 37: UK Powder Fish Protein Isolates Market By Value; 2023-2029 (US\$ Million)

Figure 38: UK Liquid Fish Protein Isolates Market By Value; 2023-2029 (US\$ Million)

Figure 39: UK Fish Protein Isolates Market by Application; 2023 (Percentage, %)

Figure 40: UK Food and Beverages Fish Protein Isolates Market By Value; 2023-2029 (US\$ Million)

Figure 41: UK Pharmaceuticals and Nutraceuticals Fish Protein Isolates Market By Value; 2023-2029 (US\$ Million)

Figure 42: UK Animal Nutrition Fish Protein Isolates Market By Value; 2023-2029 (US\$ Million)

Figure 43: UK Other Fish Protein Isolates Applications Market By Value; 2023-2029 (US\$ Million)

Figure 44: France Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 45: France Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 46: Italy Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 47: Italy Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 48: Rest of Europe Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 49: Rest of Europe Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 50: Asia Pacific Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 51: Asia Pacific Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 52: Asia Pacific Fish Protein Isolates Market by Region; 2023 (Percentage, %)

Figure 53: China Fish Protein Isolates Market by Value, 2019-2023 (US\$ Million)

Figure 54: China Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 55: Japan Fish Protein Isolates Market by Value, 2019-2023 (US\$ Million)

Figure 56: Japan Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 57: India Fish Protein Isolates Market by Value, 2019-2023 (US\$ Million)

Figure 58: India Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 59: Australia Fish Protein Isolates Market by Value, 2019-2023 (US\$ Million)

Figure 60: Australia Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 61: Rest of Asia Pacific Fish Protein Isolates Market by Value, 2019-2023 (US\$ Million)

Figure 62: Rest of Asia Pacific Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 63: Latin America Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 64: Latin America Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 65: Middle East & Africa Fish Protein Isolates Market by Value; 2019-2023 (US\$ Million)

Figure 66: Middle East & Africa Fish Protein Isolates Market by Value; 2024-2029 (US\$ Million)

Figure 67: Share of Vegans in Select Countries; 2023 (Percentage, %)

Figure 68: Global E-commerce Share as a Percentage of Total Retail Sales; 2021-2027 (Percentage, %)

Figure 69: PeterLabs Holdings Berhad Net Revenue by Segment; 2023 (Percentage, %)

Table 1: Global Fish Protein Isolates Market: Product Offerings

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