

Global Canned Sardines Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Canned Sardines market size is expected to reach \$ 2329 million by 2032, rising at a market growth of 3.4% CAGR during the forecast period (2026-2032).

Canned Sardines are shelf-stable seafood products made from sardines or eligible sardine-type species that are headed, gilled, optionally eviscerated, pretreated, packed in hermetically sealed containers with oil, brine, water, tomato sauce, or other suitable media, and thermally processed to achieve commercial sterility for ambient storage and distribution. Main commercial forms include whole fish, skinless and boneless products, segments, and fillets, with metal cans remaining the dominant packaging format. Major production and processing bases are concentrated in countries with strong sardine resources and canning industries, notably Morocco, China, Thailand, Portugal, and several other coastal processing hubs, while end-use demand spans household retail, ready-to-eat consumption, foodservice ingredients, emergency stockpiling, and international trade. The category is characterized by standardized processing, long shelf life, broad channel compatibility, and strong relevance within the global ambient seafood market.

In 2025, global canned sardines production was estimated at approximately 0.50-0.56 million tons, while mainstream FOB prices were assessed at around USD 3,200-3,900 per ton.

In recent years, canned sardines have strengthened their strategic position in the global ambient seafood market. The category is no longer driven solely by traditional preserved food demand, but increasingly by a broader value proposition combining nutritional density, convenience, affordability, and global distribution efficiency. As a standardized food product with high protein content, long shelf life, and strong cross-

border circulation capability, canned sardines are well positioned to serve multiple consumption scenarios, including household pantry stocking, convenient meals, emergency reserves, and international retail distribution. Against the backdrop of inflationary pressure, rising cold-chain costs, and growing consumer attention to affordable nutrition, the category has demonstrated notable demand resilience. At the same time, global processors and brand owners are pushing the product beyond its conventional format, extending from classic oil-packed and tomato-based offerings toward lighter, healthier, more premium, and more flavor-diversified propositions. This shift is helping canned sardines evolve from a basic staple product into a more branded, quality-oriented, and multi-occasion food category, creating broader structural growth opportunities for the industry.

Even so, the market continues to face several challenges and risks. Raw material supply remains sensitive to marine ecosystem conditions, climate variability, fishing quotas, and regional fishery regulations, all of which can affect availability and procurement costs. In addition, fluctuations in metal packaging, edible oils, energy, labor, and international logistics costs continue to influence profitability and downstream price transmission. Meanwhile, demand patterns are becoming more segmented. On one side, mass-market retail and emerging economies continue to support strong value-driven demand focused on affordability, basic nutrition, and broad channel reach. On the other side, mature markets are showing growing preference for higher-quality products with traceable sourcing, sustainability credentials, skinless and boneless processing, flavor innovation, and stronger brand trust. Looking ahead, the global canned sardines market is expected to maintain steady expansion, while competition will increasingly center not only on scale and price, but also on supply chain integration, product innovation, and long-term brand building.

This report studies the global Canned Sardines production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Canned Sardines and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Canned Sardines that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Canned Sardines total production and demand, 2021-2032, (Tons)

Global Canned Sardines total production value, 2021-2032, (USD Million)

Global Canned Sardines production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Tons), (based on production site)

Global Canned Sardines consumption by region & country, CAGR, 2021-2032 & (Tons)

U.S. VS China: Canned Sardines domestic production, consumption, key domestic manufacturers and share

Global Canned Sardines production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Tons)

Global Canned Sardines production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

Global Canned Sardines production by Channel, production, value, CAGR, 2021-2032, (USD Million) & (Tons)

This report profiles key players in the global Canned Sardines market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Century Pacific Food, Inc., Frinsa del Noroeste, S.A., Hagoromo Foods Corporation, Jealsa Foods, S.A.U., Marushin Canneries Malaysia Sdn. Bhd., Mega Prime Foods Inc., NAUTERRA, Protigam Food Industries Sdn. Bhd., Thai Union Group PCL, Universal Canning Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Canned Sardines market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Tons) and average price (US\$/Ton) by manufacturer, by Type, and by Channel. Data is given for the years 2021-2032 by year

with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Canned Sardines Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Canned Sardines Market, Segmentation by Type:

In Oil

In Sauce

In Brine and Water

Others

Global Canned Sardines Market, Segmentation by Flavor Profile:

Plain and Classic

Tomato Based

Spicy and Chili

Others

Global Canned Sardines Market, Segmentation by Distribution Channel:

Supermarkets and Hypermarkets

Online Retail

Convenience Stores

Others

Global Canned Sardines Market, Segmentation by Product Form:

Whole

Fillets

Others

Global Canned Sardines Market, Segmentation by Channel:

Households

Commercial

Companies Profiled:

Century Pacific Food, Inc.

Frinsa del Noroeste, S.A.

Hagoromo Foods Corporation

Jealsa Foods, S.A.U.

Marushin Canneries Malaysia Sdn. Bhd.

Mega Prime Foods Inc.

NAUTERRA

Protigam Food Industries Sdn. Bhd.

Thai Union Group PCL

Universal Canning Inc.

Xiamen Gulong Food Co., Ltd.

Fujian Xingguang Food Co., Ltd.

Guangdong Ganzhu Canned Foods Co., Ltd.

Guangdong Eagle Coin Haibao Foods Co., Ltd.

Bolton Food S.p.A.

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Key Questions Answered:

1. How big is the global Canned Sardines market?
2. What is the demand of the global Canned Sardines market?
3. What is the year over year growth of the global Canned Sardines market?
4. What is the production and production value of the global Canned Sardines market?
5. Who are the key producers in the global Canned Sardines market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Canned Sardines Introduction
- 1.2 World Canned Sardines Supply & Forecast
 - 1.2.1 World Canned Sardines Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Canned Sardines Production (2021-2032)
 - 1.2.3 World Canned Sardines Pricing Trends (2021-2032)
- 1.3 World Canned Sardines Production by Region (Based on Production Site)
 - 1.3.1 World Canned Sardines Production Value by Region (2021-2032)
 - 1.3.2 World Canned Sardines Production by Region (2021-2032)
 - 1.3.3 World Canned Sardines Average Price by Region (2021-2032)
 - 1.3.4 North America Canned Sardines Production (2021-2032)
 - 1.3.5 Europe Canned Sardines Production (2021-2032)
 - 1.3.6 China Canned Sardines Production (2021-2032)
 - 1.3.7 Japan Canned Sardines Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Canned Sardines Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Canned Sardines Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Canned Sardines Demand (2021-2032)
- 2.2 World Canned Sardines Consumption by Region
 - 2.2.1 World Canned Sardines Consumption by Region (2021-2026)
 - 2.2.2 World Canned Sardines Consumption Forecast by Region (2027-2032)
- 2.3 United States Canned Sardines Consumption (2021-2032)
- 2.4 China Canned Sardines Consumption (2021-2032)
- 2.5 Europe Canned Sardines Consumption (2021-2032)
- 2.6 Japan Canned Sardines Consumption (2021-2032)
- 2.7 South Korea Canned Sardines Consumption (2021-2032)
- 2.8 ASEAN Canned Sardines Consumption (2021-2032)
- 2.9 India Canned Sardines Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

- 3.1 World Canned Sardines Production Value by Manufacturer (2021-2026)

- 3.2 World Canned Sardines Production by Manufacturer (2021-2026)
- 3.3 World Canned Sardines Average Price by Manufacturer (2021-2026)
- 3.4 Canned Sardines Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Canned Sardines Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Canned Sardines in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Canned Sardines in 2025
- 3.6 Canned Sardines Market: Overall Company Footprint Analysis
 - 3.6.1 Canned Sardines Market: Region Footprint
 - 3.6.2 Canned Sardines Market: Company Product Type Footprint
 - 3.6.3 Canned Sardines Market: Company Product Application Footprint
- 3.7 Competitive Environment
 - 3.7.1 Historical Structure of the Industry
 - 3.7.2 Barriers of Market Entry
 - 3.7.3 Factors of Competition
- 3.8 New Entrant and Capacity Expansion Plans
- 3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

- 4.1 United States VS China: Canned Sardines Production Value Comparison
 - 4.1.1 United States VS China: Canned Sardines Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Canned Sardines Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Canned Sardines Production Comparison
 - 4.2.1 United States VS China: Canned Sardines Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Canned Sardines Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Canned Sardines Consumption Comparison
 - 4.3.1 United States VS China: Canned Sardines Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Canned Sardines Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Canned Sardines Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Canned Sardines Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Canned Sardines Production Value (2021-2026)

4.4.3 United States Based Manufacturers Canned Sardines Production (2021-2026)

4.5 China Based Canned Sardines Manufacturers and Market Share

4.5.1 China Based Canned Sardines Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Canned Sardines Production Value (2021-2026)

4.5.3 China Based Manufacturers Canned Sardines Production (2021-2026)

4.6 Rest of World Based Canned Sardines Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Canned Sardines Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Canned Sardines Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Canned Sardines Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Canned Sardines Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 In Oil

5.2.2 In Sauce

5.2.3 In Brine and Water

5.2.4 Others

5.3 Market Segment by Type

5.3.1 World Canned Sardines Production by Type (2021-2032)

5.3.2 World Canned Sardines Production Value by Type (2021-2032)

5.3.3 World Canned Sardines Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY FLAVOR PROFILE

6.1 World Canned Sardines Market Size Overview by Flavor Profile: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Flavor Profile

6.2.1 Plain and Classic

6.2.2 Tomato Based

6.2.3 Spicy and Chili

6.2.4 Others

6.3 Market Segment by Flavor Profile

- 6.3.1 World Canned Sardines Production by Flavor Profile (2021-2032)
- 6.3.2 World Canned Sardines Production Value by Flavor Profile (2021-2032)
- 6.3.3 World Canned Sardines Average Price by Flavor Profile (2021-2032)

7 MARKET ANALYSIS BY DISTRIBUTION CHANNEL

- 7.1 World Canned Sardines Market Size Overview by Distribution Channel: 2021 VS 2025 VS 2032
- 7.2 Segment Introduction by Distribution Channel
 - 7.2.1 Supermarkets and Hypermarkets
 - 7.2.2 Online Retail
 - 7.2.3 Convenience Stores
 - 7.2.4 Others
- 7.3 Market Segment by Distribution Channel
 - 7.3.1 World Canned Sardines Production by Distribution Channel (2021-2032)
 - 7.3.2 World Canned Sardines Production Value by Distribution Channel (2021-2032)
 - 7.3.3 World Canned Sardines Average Price by Distribution Channel (2021-2032)

8 MARKET ANALYSIS BY PRODUCT FORM

- 8.1 World Canned Sardines Market Size Overview by Product Form: 2021 VS 2025 VS 2032
- 8.2 Segment Introduction by Product Form
 - 8.2.1 Whole
 - 8.2.2 Fillets
 - 8.2.3 Others
- 8.3 Market Segment by Product Form
 - 8.3.1 World Canned Sardines Production by Product Form (2021-2032)
 - 8.3.2 World Canned Sardines Production Value by Product Form (2021-2032)
 - 8.3.3 World Canned Sardines Average Price by Product Form (2021-2032)

9 MARKET ANALYSIS BY CHANNEL

- 9.1 World Canned Sardines Market Size Overview by Channel: 2021 VS 2025 VS 2032
- 9.2 Segment Introduction by Channel
 - 9.2.1 Households
 - 9.2.2 Commercial
- 9.3 Market Segment by Channel
 - 9.3.1 World Canned Sardines Production by Channel (2021-2032)

9.3.2 World Canned Sardines Production Value by Channel (2021-2032)

9.3.3 World Canned Sardines Average Price by Channel (2021-2032)

10 COMPANY PROFILES

10.1 Century Pacific Food, Inc.

10.1.1 Century Pacific Food, Inc. Details

10.1.2 Century Pacific Food, Inc. Major Business

10.1.3 Century Pacific Food, Inc. Canned Sardines Product and Services

10.1.4 Century Pacific Food, Inc. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.1.5 Century Pacific Food, Inc. Recent Developments/Updates

10.1.6 Century Pacific Food, Inc. Competitive Strengths & Weaknesses

10.2 Frinsa del Noroeste, S.A.

10.2.1 Frinsa del Noroeste, S.A. Details

10.2.2 Frinsa del Noroeste, S.A. Major Business

10.2.3 Frinsa del Noroeste, S.A. Canned Sardines Product and Services

10.2.4 Frinsa del Noroeste, S.A. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.2.5 Frinsa del Noroeste, S.A. Recent Developments/Updates

10.2.6 Frinsa del Noroeste, S.A. Competitive Strengths & Weaknesses

10.3 Hagoromo Foods Corporation

10.3.1 Hagoromo Foods Corporation Details

10.3.2 Hagoromo Foods Corporation Major Business

10.3.3 Hagoromo Foods Corporation Canned Sardines Product and Services

10.3.4 Hagoromo Foods Corporation Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.3.5 Hagoromo Foods Corporation Recent Developments/Updates

10.3.6 Hagoromo Foods Corporation Competitive Strengths & Weaknesses

10.4 Jealsa Foods, S.A.U.

10.4.1 Jealsa Foods, S.A.U. Details

10.4.2 Jealsa Foods, S.A.U. Major Business

10.4.3 Jealsa Foods, S.A.U. Canned Sardines Product and Services

10.4.4 Jealsa Foods, S.A.U. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.4.5 Jealsa Foods, S.A.U. Recent Developments/Updates

10.4.6 Jealsa Foods, S.A.U. Competitive Strengths & Weaknesses

10.5 Marushin Canneries Malaysia Sdn. Bhd.

10.5.1 Marushin Canneries Malaysia Sdn. Bhd. Details

- 10.5.2 Marushin Canned Sardines Malaysia Sdn. Bhd. Major Business
- 10.5.3 Marushin Canned Sardines Malaysia Sdn. Bhd. Canned Sardines Product and Services
- 10.5.4 Marushin Canned Sardines Malaysia Sdn. Bhd. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.5.5 Marushin Canned Sardines Malaysia Sdn. Bhd. Recent Developments/Updates
- 10.5.6 Marushin Canned Sardines Malaysia Sdn. Bhd. Competitive Strengths & Weaknesses
- 10.6 Mega Prime Foods Inc.
- 10.6.1 Mega Prime Foods Inc. Details
- 10.6.2 Mega Prime Foods Inc. Major Business
- 10.6.3 Mega Prime Foods Inc. Canned Sardines Product and Services
- 10.6.4 Mega Prime Foods Inc. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.6.5 Mega Prime Foods Inc. Recent Developments/Updates
- 10.6.6 Mega Prime Foods Inc. Competitive Strengths & Weaknesses
- 10.7 NAUTERRA
- 10.7.1 NAUTERRA Details
- 10.7.2 NAUTERRA Major Business
- 10.7.3 NAUTERRA Canned Sardines Product and Services
- 10.7.4 NAUTERRA Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.7.5 NAUTERRA Recent Developments/Updates
- 10.7.6 NAUTERRA Competitive Strengths & Weaknesses
- 10.8 Protigam Food Industries Sdn. Bhd.
- 10.8.1 Protigam Food Industries Sdn. Bhd. Details
- 10.8.2 Protigam Food Industries Sdn. Bhd. Major Business
- 10.8.3 Protigam Food Industries Sdn. Bhd. Canned Sardines Product and Services
- 10.8.4 Protigam Food Industries Sdn. Bhd. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.8.5 Protigam Food Industries Sdn. Bhd. Recent Developments/Updates
- 10.8.6 Protigam Food Industries Sdn. Bhd. Competitive Strengths & Weaknesses
- 10.9 Thai Union Group PCL
- 10.9.1 Thai Union Group PCL Details
- 10.9.2 Thai Union Group PCL Major Business
- 10.9.3 Thai Union Group PCL Canned Sardines Product and Services
- 10.9.4 Thai Union Group PCL Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 10.9.5 Thai Union Group PCL Recent Developments/Updates
- 10.9.6 Thai Union Group PCL Competitive Strengths & Weaknesses

10.10 Universal Canning Inc.

10.10.1 Universal Canning Inc. Details

10.10.2 Universal Canning Inc. Major Business

10.10.3 Universal Canning Inc. Canned Sardines Product and Services

10.10.4 Universal Canning Inc. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.10.5 Universal Canning Inc. Recent Developments/Updates

10.10.6 Universal Canning Inc. Competitive Strengths & Weaknesses

10.11 Xiamen Gulong Food Co., Ltd.

10.11.1 Xiamen Gulong Food Co., Ltd. Details

10.11.2 Xiamen Gulong Food Co., Ltd. Major Business

10.11.3 Xiamen Gulong Food Co., Ltd. Canned Sardines Product and Services

10.11.4 Xiamen Gulong Food Co., Ltd. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.11.5 Xiamen Gulong Food Co., Ltd. Recent Developments/Updates

10.11.6 Xiamen Gulong Food Co., Ltd. Competitive Strengths & Weaknesses

10.12 Fujian Xingguang Food Co., Ltd.

10.12.1 Fujian Xingguang Food Co., Ltd. Details

10.12.2 Fujian Xingguang Food Co., Ltd. Major Business

10.12.3 Fujian Xingguang Food Co., Ltd. Canned Sardines Product and Services

10.12.4 Fujian Xingguang Food Co., Ltd. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.12.5 Fujian Xingguang Food Co., Ltd. Recent Developments/Updates

10.12.6 Fujian Xingguang Food Co., Ltd. Competitive Strengths & Weaknesses

10.13 Guangdong Ganzhu Canned Foods Co., Ltd.

10.13.1 Guangdong Ganzhu Canned Foods Co., Ltd. Details

10.13.2 Guangdong Ganzhu Canned Foods Co., Ltd. Major Business

10.13.3 Guangdong Ganzhu Canned Foods Co., Ltd. Canned Sardines Product and Services

10.13.4 Guangdong Ganzhu Canned Foods Co., Ltd. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.13.5 Guangdong Ganzhu Canned Foods Co., Ltd. Recent Developments/Updates

10.13.6 Guangdong Ganzhu Canned Foods Co., Ltd. Competitive Strengths & Weaknesses

10.14 Guangdong Eagle Coin Haibao Foods Co., Ltd.

10.14.1 Guangdong Eagle Coin Haibao Foods Co., Ltd. Details

10.14.2 Guangdong Eagle Coin Haibao Foods Co., Ltd. Major Business

10.14.3 Guangdong Eagle Coin Haibao Foods Co., Ltd. Canned Sardines Product and Services

10.14.4 Guangdong Eagle Coin Haibao Foods Co., Ltd. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.14.5 Guangdong Eagle Coin Haibao Foods Co., Ltd. Recent Developments/Updates

10.14.6 Guangdong Eagle Coin Haibao Foods Co., Ltd. Competitive Strengths & Weaknesses

10.15 Bolton Food S.p.A.

10.15.1 Bolton Food S.p.A. Details

10.15.2 Bolton Food S.p.A. Major Business

10.15.3 Bolton Food S.p.A. Canned Sardines Product and Services

10.15.4 Bolton Food S.p.A. Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.15.5 Bolton Food S.p.A. Recent Developments/Updates

10.15.6 Bolton Food S.p.A. Competitive Strengths & Weaknesses

10.16 ·

10.16.1 · Details

10.16.2 · Major Business

10.16.3 · Canned Sardines Product and Services

10.16.4 · Canned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

10.16.5 · Recent Developments/Updates

10.16.6 · Competitive Strengths & Weaknesses

11 INDUSTRY CHAIN ANALYSIS

11.1 Canned Sardines Industry Chain

11.2 Canned Sardines Upstream Analysis

11.2.1 Canned Sardines Core Raw Materials

11.2.2 Main Manufacturers of Canned Sardines Core Raw Materials

11.3 Midstream Analysis

11.4 Downstream Analysis

11.5 Canned Sardines Production Mode

11.6 Canned Sardines Procurement Model

11.7 Canned Sardines Industry Sales Model and Sales Channels

11.7.1 Canned Sardines Sales Model

11.7.2 Canned Sardines Typical Distributors

12 RESEARCH FINDINGS AND CONCLUSION

13 APPENDIX

13.1 Methodology

13.2 Research Process and Data Source

13.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. World Canned Sardines Production Value by Region (2021, 2025 and 2032) & (USD Million)
- Table 2. World Canned Sardines Production Value by Region (2021-2026) & (USD Million)
- Table 3. World Canned Sardines Production Value by Region (2027-2032) & (USD Million)
- Table 4. World Canned Sardines Production Value Market Share by Region (2021-2026)
- Table 5. World Canned Sardines Production Value Market Share by Region (2027-2032)
- Table 6. World Canned Sardines Production by Region (2021-2026) & (Tons)
- Table 7. World Canned Sardines Production by Region (2027-2032) & (Tons)
- Table 8. World Canned Sardines Production Market Share by Region (2021-2026)
- Table 9. World Canned Sardines Production Market Share by Region (2027-2032)
- Table 10. World Canned Sardines Average Price by Region (2021-2026) & (US\$/Ton)
- Table 11. World Canned Sardines Average Price by Region (2027-2032) & (US\$/Ton)
- Table 12. Canned Sardines Major Market Trends
- Table 13. World Canned Sardines Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)
- Table 14. World Canned Sardines Consumption by Region (2021-2026) & (Tons)
- Table 15. World Canned Sardines Consumption Forecast by Region (2027-2032) & (Tons)
- Table 16. World Canned Sardines Production Value by Manufacturer (2021-2026) & (USD Million)
- Table 17. Production Value Market Share of Key Canned Sardines Producers in 2025
- Table 18. World Canned Sardines Production by Manufacturer (2021-2026) & (Tons)
- Table 19. Production Market Share of Key Canned Sardines Producers in 2025
- Table 20. World Canned Sardines Average Price by Manufacturer (2021-2026) & (US\$/Ton)
- Table 21. Global Canned Sardines Company Evaluation Quadrant
- Table 22. World Canned Sardines Industry Rank of Major Manufacturers, Based on Production Value in 2025
- Table 23. Head Office and Canned Sardines Production Site of Key Manufacturer
- Table 24. Canned Sardines Market: Company Product Type Footprint
- Table 25. Canned Sardines Market: Company Product Application Footprint

Table 26. Canned Sardines Competitive Factors

Table 27. Canned Sardines New Entrant and Capacity Expansion Plans

Table 28. Canned Sardines Mergers & Acquisitions Activity

Table 29. United States VS China Canned Sardines Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Canned Sardines Production Comparison, (2021 & 2025 & 2032) & (Tons)

Table 31. United States VS China Canned Sardines Consumption Comparison, (2021 & 2025 & 2032) & (Tons)

Table 32. United States Based Canned Sardines Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Canned Sardines Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Canned Sardines Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Canned Sardines Production (2021-2026) & (Tons)

Table 36. United States Based Manufacturers Canned Sardines Production Market Share (2021-2026)

Table 37. China Based Canned Sardines Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Canned Sardines Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Canned Sardines Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Canned Sardines Production, (2021-2026) & (Tons)

Table 41. China Based Manufacturers Canned Sardines Production Market Share (2021-2026)

Table 42. Rest of World Based Canned Sardines Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Canned Sardines Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Canned Sardines Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Canned Sardines Production, (2021-2026) & (Tons)

Table 46. Rest of World Based Manufacturers Canned Sardines Production Market Share (2021-2026)

Table 47. World Canned Sardines Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Canned Sardines Production by Type (2021-2026) & (Tons)

Table 49. World Canned Sardines Production by Type (2027-2032) & (Tons)

Table 50. World Canned Sardines Production Value by Type (2021-2026) & (USD Million)

Table 51. World Canned Sardines Production Value by Type (2027-2032) & (USD Million)

Table 52. World Canned Sardines Average Price by Type (2021-2026) & (US\$/Ton)

Table 53. World Canned Sardines Average Price by Type (2027-2032) & (US\$/Ton)

Table 54. World Canned Sardines Production Value by Flavor Profile, (USD Million), 2021 & 2025 & 2032

Table 55. World Canned Sardines Production by Flavor Profile (2021-2026) & (Tons)

Table 56. World Canned Sardines Production by Flavor Profile (2027-2032) & (Tons)

Table 57. World Canned Sardines Production Value by Flavor Profile (2021-2026) & (USD Million)

Table 58. World Canned Sardines Production Value by Flavor Profile (2027-2032) & (USD Million)

Table 59. World Canned Sardines Average Price by Flavor Profile (2021-2026) & (US\$/Ton)

Table 60. World Canned Sardines Average Price by Flavor Profile (2027-2032) & (US\$/Ton)

Table 61. World Canned Sardines Production Value by Distribution Channel, (USD Million), 2021 & 2025 & 2032

Table 62. World Canned Sardines Production by Distribution Channel (2021-2026) & (Tons)

Table 63. World Canned Sardines Production by Distribution Channel (2027-2032) & (Tons)

Table 64. World Canned Sardines Production Value by Distribution Channel (2021-2026) & (USD Million)

Table 65. World Canned Sardines Production Value by Distribution Channel (2027-2032) & (USD Million)

Table 66. World Canned Sardines Average Price by Distribution Channel (2021-2026) & (US\$/Ton)

Table 67. World Canned Sardines Average Price by Distribution Channel (2027-2032) & (US\$/Ton)

Table 68. World Canned Sardines Production Value by Product Form, (USD Million), 2021 & 2025 & 2032

Table 69. World Canned Sardines Production by Product Form (2021-2026) & (Tons)

Table 70. World Canned Sardines Production by Product Form (2027-2032) & (Tons)

Table 71. World Canned Sardines Production Value by Product Form (2021-2026) & (USD Million)

Table 72. World Canned Sardines Production Value by Product Form (2027-2032) & (USD Million)

Table 73. World Canned Sardines Average Price by Product Form (2021-2026) & (US\$/Ton)

Table 74. World Canned Sardines Average Price by Product Form (2027-2032) & (US\$/Ton)

Table 75. World Canned Sardines Production Value by Channel, (USD Million), 2021 & 2025 & 2032

Table 76. World Canned Sardines Production by Channel (2021-2026) & (Tons)

Table 77. World Canned Sardines Production by Channel (2027-2032) & (Tons)

Table 78. World Canned Sardines Production Value by Channel (2021-2026) & (USD Million)

Table 79. World Canned Sardines Production Value by Channel (2027-2032) & (USD Million)

Table 80. World Canned Sardines Average Price by Channel (2021-2026) & (US\$/Ton)

Table 81. World Canned Sardines Average Price by Channel (2027-2032) & (US\$/Ton)

Table 82. Century Pacific Food, Inc. Basic Information, Manufacturing Base and Competitors

Table 83. Century Pacific Food, Inc. Major Business

Table 84. Century Pacific Food, Inc. Canned Sardines Product and Services

Table 85. Century Pacific Food, Inc. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 86. Century Pacific Food, Inc. Recent Developments/Updates

Table 87. Century Pacific Food, Inc. Competitive Strengths & Weaknesses

Table 88. Frinsa del Noroeste, S.A. Basic Information, Manufacturing Base and Competitors

Table 89. Frinsa del Noroeste, S.A. Major Business

Table 90. Frinsa del Noroeste, S.A. Canned Sardines Product and Services

Table 91. Frinsa del Noroeste, S.A. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 92. Frinsa del Noroeste, S.A. Recent Developments/Updates

Table 93. Frinsa del Noroeste, S.A. Competitive Strengths & Weaknesses

Table 94. Hagogromo Foods Corporation Basic Information, Manufacturing Base and Competitors

Table 95. Hagoromo Foods Corporation Major Business

Table 96. Hagoromo Foods Corporation Canned Sardines Product and Services

Table 97. Hagoromo Foods Corporation Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 98. Hagoromo Foods Corporation Recent Developments/Updates

Table 99. Hagoromo Foods Corporation Competitive Strengths & Weaknesses

Table 100. Jealsa Foods, S.A.U. Basic Information, Manufacturing Base and Competitors

Table 101. Jealsa Foods, S.A.U. Major Business

Table 102. Jealsa Foods, S.A.U. Canned Sardines Product and Services

Table 103. Jealsa Foods, S.A.U. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 104. Jealsa Foods, S.A.U. Recent Developments/Updates

Table 105. Jealsa Foods, S.A.U. Competitive Strengths & Weaknesses

Table 106. Marushin Canneries Malaysia Sdn. Bhd. Basic Information, Manufacturing Base and Competitors

Table 107. Marushin Canneries Malaysia Sdn. Bhd. Major Business

Table 108. Marushin Canneries Malaysia Sdn. Bhd. Canned Sardines Product and Services

Table 109. Marushin Canneries Malaysia Sdn. Bhd. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 110. Marushin Canneries Malaysia Sdn. Bhd. Recent Developments/Updates

Table 111. Marushin Canneries Malaysia Sdn. Bhd. Competitive Strengths & Weaknesses

Table 112. Mega Prime Foods Inc. Basic Information, Manufacturing Base and Competitors

Table 113. Mega Prime Foods Inc. Major Business

Table 114. Mega Prime Foods Inc. Canned Sardines Product and Services

Table 115. Mega Prime Foods Inc. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 116. Mega Prime Foods Inc. Recent Developments/Updates

Table 117. Mega Prime Foods Inc. Competitive Strengths & Weaknesses

Table 118. NAUTERRA Basic Information, Manufacturing Base and Competitors

Table 119. NAUTERRA Major Business

Table 120. NAUTERRA Canned Sardines Product and Services

Table 121. NAUTERRA Canned Sardines Production (Tons), Price (US\$/Ton),

Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 122. NAUTERRA Recent Developments/Updates

Table 123. NAUTERRA Competitive Strengths & Weaknesses

Table 124. Protigam Food Industries Sdn. Bhd. Basic Information, Manufacturing Base and Competitors

Table 125. Protigam Food Industries Sdn. Bhd. Major Business

Table 126. Protigam Food Industries Sdn. Bhd. Canned Sardines Product and Services

Table 127. Protigam Food Industries Sdn. Bhd. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 128. Protigam Food Industries Sdn. Bhd. Recent Developments/Updates

Table 129. Protigam Food Industries Sdn. Bhd. Competitive Strengths & Weaknesses

Table 130. Thai Union Group PCL Basic Information, Manufacturing Base and Competitors

Table 131. Thai Union Group PCL Major Business

Table 132. Thai Union Group PCL Canned Sardines Product and Services

Table 133. Thai Union Group PCL Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 134. Thai Union Group PCL Recent Developments/Updates

Table 135. Thai Union Group PCL Competitive Strengths & Weaknesses

Table 136. Universal Canning Inc. Basic Information, Manufacturing Base and Competitors

Table 137. Universal Canning Inc. Major Business

Table 138. Universal Canning Inc. Canned Sardines Product and Services

Table 139. Universal Canning Inc. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 140. Universal Canning Inc. Recent Developments/Updates

Table 141. Universal Canning Inc. Competitive Strengths & Weaknesses

Table 142. Xiamen Gulong Food Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 143. Xiamen Gulong Food Co., Ltd. Major Business

Table 144. Xiamen Gulong Food Co., Ltd. Canned Sardines Product and Services

Table 145. Xiamen Gulong Food Co., Ltd. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 146. Xiamen Gulong Food Co., Ltd. Recent Developments/Updates

Table 147. Xiamen Gulong Food Co., Ltd. Competitive Strengths & Weaknesses

Table 148. Fujian Xingguang Food Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 149. Fujian Xingguang Food Co., Ltd. Major Business

Table 150. Fujian Xingguang Food Co., Ltd. Canned Sardines Product and Services

Table 151. Fujian Xingguang Food Co., Ltd. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 152. Fujian Xingguang Food Co., Ltd. Recent Developments/Updates

Table 153. Fujian Xingguang Food Co., Ltd. Competitive Strengths & Weaknesses

Table 154. Guangdong Ganzhu Canned Foods Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 155. Guangdong Ganzhu Canned Foods Co., Ltd. Major Business

Table 156. Guangdong Ganzhu Canned Foods Co., Ltd. Canned Sardines Product and Services

Table 157. Guangdong Ganzhu Canned Foods Co., Ltd. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 158. Guangdong Ganzhu Canned Foods Co., Ltd. Recent Developments/Updates

Table 159. Guangdong Ganzhu Canned Foods Co., Ltd. Competitive Strengths & Weaknesses

Table 160. Guangdong Eagle Coin Haibao Foods Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 161. Guangdong Eagle Coin Haibao Foods Co., Ltd. Major Business

Table 162. Guangdong Eagle Coin Haibao Foods Co., Ltd. Canned Sardines Product and Services

Table 163. Guangdong Eagle Coin Haibao Foods Co., Ltd. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 164. Guangdong Eagle Coin Haibao Foods Co., Ltd. Recent Developments/Updates

Table 165. Guangdong Eagle Coin Haibao Foods Co., Ltd. Competitive Strengths & Weaknesses

Table 166. Bolton Food S.p.A. Basic Information, Manufacturing Base and Competitors

Table 167. Bolton Food S.p.A. Major Business

Table 168. Bolton Food S.p.A. Canned Sardines Product and Services

Table 169. Bolton Food S.p.A. Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 170. Bolton Food S.p.A. Recent Developments/Updates

Table 171. Bolton Food S.p.A. Competitive Strengths & Weaknesses

Table 172. - Basic Information, Manufacturing Base and Competitors

Table 173. - Major Business

Table 174. - Canned Sardines Product and Services

Table 175. - Canned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 176. - Recent Developments/Updates

Table 177. - Competitive Strengths & Weaknesses

Table 178. Global Key Players of Canned Sardines Upstream (Raw Materials)

Table 179. Global Canned Sardines Typical Customers

Table 180. Canned Sardines Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Canned Sardines Picture

Figure 2. World Canned Sardines Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Canned Sardines Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Canned Sardines Production (2021-2032) & (Tons)

Figure 5. World Canned Sardines Average Price (2021-2032) & (US\$/Ton)

Figure 6. World Canned Sardines Production Value Market Share by Region (2021-2032)

Figure 7. World Canned Sardines Production Market Share by Region (2021-2032)

Figure 8. North America Canned Sardines Production (2021-2032) & (Tons)

Figure 9. Europe Canned Sardines Production (2021-2032) & (Tons)

Figure 10. China Canned Sardines Production (2021-2032) & (Tons)

Figure 11. Japan Canned Sardines Production (2021-2032) & (Tons)

Figure 12. Canned Sardines Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Canned Sardines Consumption (2021-2032) & (Tons)

Figure 15. World Canned Sardines Consumption Market Share by Region (2021-2032)

Figure 16. United States Canned Sardines Consumption (2021-2032) & (Tons)

Figure 17. China Canned Sardines Consumption (2021-2032) & (Tons)

Figure 18. Europe Canned Sardines Consumption (2021-2032) & (Tons)

Figure 19. Japan Canned Sardines Consumption (2021-2032) & (Tons)

Figure 20. South Korea Canned Sardines Consumption (2021-2032) & (Tons)

Figure 21. ASEAN Canned Sardines Consumption (2021-2032) & (Tons)

Figure 22. India Canned Sardines Consumption (2021-2032) & (Tons)

Figure 23. Producer Shipments of Canned Sardines by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Canned Sardines Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Canned Sardines Markets in 2025

Figure 26. United States VS China: Canned Sardines Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Canned Sardines Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Canned Sardines Consumption Market Share

Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Canned Sardines Production Market Share 2025

Figure 30. China Based Manufacturers Canned Sardines Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Canned Sardines Production Market Share 2025

Figure 32. World Canned Sardines Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Canned Sardines Production Value Market Share by Type in 2025

Figure 34. In Oil

Figure 35. In Sauce

Figure 36. In Brine and Water

Figure 37. Others

Figure 38. World Canned Sardines Production Market Share by Type (2021-2032)

Figure 39. World Canned Sardines Production Value Market Share by Type (2021-2032)

Figure 40. World Canned Sardines Average Price by Type (2021-2032) & (US\$/Ton)

Figure 41. World Canned Sardines Production Value by Flavor Profile, (USD Million), 2021 & 2025 & 2032

Figure 42. World Canned Sardines Production Value Market Share by Flavor Profile in 2025

Figure 43. Plain and Classic

Figure 44. Tomato Based

Figure 45. Spicy and Chili

Figure 46. Others

Figure 47. World Canned Sardines Production Market Share by Flavor Profile (2021-2032)

Figure 48. World Canned Sardines Production Value Market Share by Flavor Profile (2021-2032)

Figure 49. World Canned Sardines Average Price by Flavor Profile (2021-2032) & (US\$/Ton)

Figure 50. World Canned Sardines Production Value by Distribution Channel, (USD Million), 2021 & 2025 & 2032

Figure 51. World Canned Sardines Production Value Market Share by Distribution Channel in 2025

Figure 52. Supermarkets and Hypermarkets

Figure 53. Online Retail

Figure 54. Convenience Stores

Figure 55. Others

Figure 56. World Canned Sardines Production Market Share by Distribution Channel (2021-2032)

Figure 57. World Canned Sardines Production Value Market Share by Distribution Channel (2021-2032)

Figure 58. World Canned Sardines Average Price by Distribution Channel (2021-2032) & (US\$/Ton)

Figure 59. World Canned Sardines Production Value by Product Form, (USD Million), 2021 & 2025 & 2032

Figure 60. World Canned Sardines Production Value Market Share by Product Form in 2025

Figure 61. Whole

Figure 62. Fillets

Figure 63. Others

Figure 64. World Canned Sardines Production Market Share by Product Form (2021-2032)

Figure 65. World Canned Sardines Production Value Market Share by Product Form (2021-2032)

Figure 66. World Canned Sardines Average Price by Product Form (2021-2032) & (US\$/Ton)

Figure 67. World Canned Sardines Production Value by Channel, (USD Million), 2021 & 2025 & 2032

Figure 68. World Canned Sardines Production Value Market Share by Channel in 2025

Figure 69. Households

Figure 70. Commercial

Figure 71. World Canned Sardines Production Market Share by Channel (2021-2032)

Figure 72. World Canned Sardines Production Value Market Share by Channel (2021-2032)

Figure 73. World Canned Sardines Average Price by Channel (2021-2032) & (US\$/Ton)

Figure 74. Canned Sardines Industry Chain

Figure 75. Canned Sardines Procurement Model

Figure 76. Canned Sardines Sales Model

Figure 77. Canned Sardines Sales Channels, Direct Sales, and Distribution

Figure 78. Methodology

Figure 79. Research Process and Data Source

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