

# Global Crude Fish Oil Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Crude Fish Oil market size is expected to reach \$ 4530 million by 2032, rising at a market growth of 4.1% CAGR during the forecast period (2026-2032).

Fish oil is a virtually unique source of natural LC omega-3 fatty acids ? EPA, DPA and DHA. It comes from fatty fish, specifically the tissue of fatty fish, such as trout, mackerel, tuna, herring, sardines, and salmon. This report focuses on the crude fish oil, which generally refers to the un-deep-refined oil stream produced in the fishmeal/fish-oil ?reduction? industry, using either whole small pelagic (forage) fish (e.g., anchoveta) or fish-processing by-products (heads, frames, skins, trimmings, viscera). The dominant industrial route is the wet pressing method: cooking (to coagulate protein and release bound water/oil), pressing (to split solid presscake and press liquor), and rapid phase separation of oil/water/solids via centrifugation, followed by basic in-plant ?oil polishing?/dewatering before storage. IFFO similarly frames marine-ingredient processing as a cooking?pressing?extraction/separation?drying cycle yielding both fishmeal and fish oil.

Commercially, crude fish oil is a B2B bulk nutrient ingredient tightly coupled with fishmeal economics. Upstream supply comes from capture fisheries and seafood-processing by-product streams; midstream value is created in reduction plants via throughput, yield, QA, storage and export logistics; downstream demand is dominated by aquafeed formulators, with a meaningful second channel into the omega-3 supplement value chain (typically requiring further refining/concentration before consumer products). IFFO?s high-level allocation anchor indicates roughly three quarters of fishmeal and fish oil are used in aquaculture feeds, while ~20% of total fish oil goes into the growing fish-oil supplement industry.

Industry dynamics are best summarized as 'stable long-run volume, volatile short-run supply, and structural shift to by-products.' IFFO reports global fish-oil production has stabilized around ~1.2 million tonnes in 2020-2024, with by-products becoming the majority source; its by-product update states by-products accounted for ~54% of fish-oil output in 2023, supported by high-yield trimmings (notably salmon and pangasius). On volatility, FAO GLOBEFISH highlights that in 2023 fish-oil output fell ~21%, largely due to poor Peruvian anchoveta catches, underscoring climate/stock and quota sensitivity. On market access, MarinTrust (formerly IFFO RS) and chain-of-custody requirements are increasingly embedded in procurement; MarinTrust communications note nearly half of global fishmeal/fish-oil production is already certified under its program, raising the bar for responsible sourcing and traceability.

The global fish oil is mainly produced in Chile, Peru, Denmark, Norway, Iceland, US, South Africa, and India, etc. The global key players of fish oil are Fiordo Austral Group, TASA, Copeinca, Pesquera Hayduk, FF Skagen A/S, TripleNine Group A/S, Pesquera Exalmar, Havsbrøn, Oceana Group and Austevoll Seafood ASA, etc. Global top ten players occupied for a share of 30% in 2025. In terms of application, Aqua-feed is the largest application, with a share about 53%.

This report studies the global Crude Fish Oil production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Crude Fish Oil 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 Crude Fish Oil that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Crude Fish Oil total production and demand, 2021-2032, (Kiloton)

Global Crude Fish Oil total production value, 2021-2032, (USD Million)

Global Crude Fish Oil production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kiloton), (based on production site)

Global Crude Fish Oil consumption by region & country, CAGR, 2021-2032 & (Kiloton)

U.S. VS China: Crude Fish Oil domestic production, consumption, key domestic manufacturers and share

Global Crude Fish Oil production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kiloton)

Global Crude Fish Oil production by Type, production, value, CAGR, 2021-2032, (USD

Million) & (Kiloton)

Global Crude Fish Oil production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kiloton)

This report profiles key players in the global Crude Fish Oil 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 Fiordo Austral Group, TASA, Copeinca, Pesquera Hayduk, FF Skagen A/S, TripleNine Group A/S, Pesquera Exalmar, Havsbr?n, Oceana Group, Austevoll Seafood ASA, 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 Crude Fish Oil market

### **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kiloton) and average price (US\$/Ton) by manufacturer, by Type, and by Application. 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 Crude Fish Oil Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Crude Fish Oil Market, Segmentation by Type:

Feed Grade Fish Oil

Food Grade Fish Oil

Pharmaceutical Grade Fish Oil

#### Global Crude Fish Oil Market, Segmentation By Raw Material Source:

By-Product Fish Oils

Whole-Fish (Reduction Fisheries) Oils

#### Global Crude Fish Oil Market, Segmentation by Technology Route:

Wet Pressing (Cook?Press?Centrifuge Separation)

Others

#### Global Crude Fish Oil Market, Segmentation by Species/Origin Mix:

Wild-capture by-products

Pangasius off-cuts & others

Salmon trimmings

Tuna trimmings & offal

Tilapia by-products

## Global Crude Fish Oil Market, Segmentation by Application:

Aquatic Feed

Animal/Pet

Food

Nutritional Supplements

Other

## Companies Profiled:

Fiordo Austral Group

TASA

Copeinca

Pesquera Hayduk

FF Skagen A/S

TripleNine Group A/S

Pesquera Exalmar

Havsbr?n

Oceana Group

Austevoll Seafood ASA

Pesquera Diamante S.A.

Camanchaca

Pesquera La Portada SA

Orizon S.A.

Corpesca S.A.

Nissui Group

Pesquera Centinela S.A.C.

Animalfeeds International Corporation

Omega Protein Corporation

United Marine Products

Eskja

Pioneer Fishing

Yashaswi Fish Meal and Oil Company

Ningbo Yuanda Marine Biotechnology

Ningbo Yuxiang Marine Biotechnology

Wufeng Marine Biotechnology

### **Key Questions Answered:**

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

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