

Global Fish Paste-Based Products Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Fish Paste-Based Products market size was valued at US\$ 6591 million in 2025 and is forecast to a readjusted size of US\$ 9205 million by 2032 with a CAGR of 5.0% during review period.

In 2025, global Fish Paste-Based Products sales reached approximately 2,494.31 Kilotons, with an average global market price of around US\$ 2,568 per Ton.

Fish paste-based products are processed seafood foods made primarily from surimi or minced fish paste, where myofibrillar proteins are solubilized with salt and finely comminuted to form a viscoelastic paste. The paste is then blended with ingredients such as starch, egg white or plant proteins, seasonings, and functional additives, shaped by extrusion, stuffing, or moulding, and thermally set (steamed, boiled, baked, fried, and/or retort-sterilized) to build a stable gel network. Product quality is largely defined by protein gelation and elasticity control, and common formats include fish balls, fish cakes, "fish tofu," crab-flavored sticks, chikuwa, and kamaboko-type items. Designed for consistent texture, flavor stability, and cold-chain distribution, these products are widely consumed in household meals, foodservice chains, and convenience ready-to-eat channels.

Fish paste-based products are typically produced through a scaled workflow of raw-material sourcing & cold chain ? surimi standardization ? formulation & shaping ? thermal setting ? cooling & packaging ? channel distribution. Many manufacturers rely on in-house or partnered frozen-surimi supply (white-meat fish, aquaculture by-products), then conduct thawing, deboning/filtration, comminution, and salt-solubilization to build a functional protein paste. Starch, egg white or plant proteins, seasonings, and

functional additives (water retention, elasticity, cryoprotection) are blended to target texture, followed by shaping via extrusion, stuffing, or moulding. Products are then steamed/boiled/fried/baked and sometimes retort-sterilized to set the gel network and stabilize flavor, before chilled or frozen packaging for supermarkets, convenience stores, foodservice, and institutional catering. Gross margins vary widely with fish input costs, energy/cold-chain expenses, utilization, and brand premium: OEM/basic SKUs often ~10%–25%, while branded mid-to-premium products commonly ~20%–40%; leading players with strong R&D and channel leverage can be higher but remain cyclical. The upstream includes frozen surimi/fish inputs, ingredients (starch, proteins, seasonings), food additives, packaging, and cold-chain logistics. Midstream covers surimi processing, product R&D, manufacturing, and compliance QA (microbiology, allergens, labeling). Downstream spans retail/e-commerce, restaurant chains and hotpot ingredients, convenience RTE channels, institutional catering, as well as regional distributors and export markets.

Market Development Opportunities & Main Driving Factors

Fish paste-based products (surimi-centered items such as fish balls, fish cakes, chikuwa, and fish sausages) are evolving from "traditional chilled staples" into scalable, high-convenience marine protein offerings. Japan's government white paper notes that declining seafood consumption is driven by higher prices and the time/effort required for preparation, while preferences are shifting toward simpler, more convenient eating—prompting cross-industry development of high-convenience seafood products. This creates a structural tailwind for surimi-based value-added processing. Annual reports and integrated reports from leading seafood groups echo the same direction: global supply chains built around white-meat fish resources, frozen surimi, processing upgrades, and higher value-added product portfolios are becoming core growth levers. In an inflationary cycle where consumers polarize between low-price and value-added options, branded players gain a clearer window to expand share through product strength, channel execution, and scale efficiency.

Market Challenges, Risks, & Restraints

Key uncertainties come from "raw-material and cost volatility + safety/compliance burdens + cross-border risks." Fish paste products are highly sensitive to frozen surimi inputs (often tied to white-meat fish such as Alaska pollock) and cold-chain economics; supply conditions, quotas, FX, and energy/logistics costs directly affect margin stability. Public disclosures from major players repeatedly emphasize how surimi-based products are tightly coupled with access to resource procurement and processing ecosystems,

including North America. Meanwhile, government reporting on trade and regulation points to periods of declining seafood export volume/value and to import restrictions or regulatory disruptions in certain markets, adding structural volatility for exporters and overseas-growth strategies. Layered on top are strict food-safety, labeling, allergen, and additive compliance requirements—meaning any shock can quickly become a trust-and-brand event without robust quality systems and supply-chain resilience.

Downstream Demand Trends

Demand is consolidating around three high-certainty directions: higher convenience (RTE/ready-to-heat/ready-to-cook), higher consistency (stable texture/flavor, shelf-life and cold-chain fit), and higher value (functional and occasion-based offerings). At the policy level, government guidance emphasizes improving distribution efficiency and accelerating the development of high-convenience seafood products, alongside recurring public mechanisms to encourage fish consumption—signaling a shared public-private narrative of "making seafood easier to eat." Companies are responding with "value-chain integration + higher overseas production/sales mix," leveraging global procurement, R&D, and processing capabilities to deliver more value-added products while penetrating household, foodservice, and convenience channels. From a sell-side perspective, surimi has long supported the sector's globalization; going forward, competitiveness will concentrate on the combined strength of resource access, processing technology, and brand/channel power.

This report is a detailed and comprehensive analysis for global Fish Paste-Based Products market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Fish Paste-Based Products market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Fish Paste-Based Products market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Fish Paste-Based Products market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Fish Paste-Based Products market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Fish Paste-Based Products
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Fish Paste-Based Products market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Anjoyfood, Viciunai Group, Kibun Foods, Trident Seafoods, Ichimasa Kamaboko, Angulas Aguinaga, Luck Union Foods, Fleury Michon, Sugiyu, Haixin, etc.

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

Market Segmentation

Fish Paste-Based Products market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Frozen

Chilled/Fresh

Market segment by Cooking Method

Steamed and Boiled

Fried

Grilled/Roasted

Biomimetic

Market segment by Raw Material Source

Marine Fish

Freshwater Fish

Others

Market segment by Sales Channel

Online Sales

Offline Sales

Market segment by Application

Households

HoReCa

Others

Major players covered

Anjoyfood

Viciunai Group

Kibun Foods

Trident Seafoods

Ichimasa Kamaboko

Angulas Aguinaga

Luck Union Foods

Fleury Michon

Sugiyo

Haixin

Coraya

Aquamar

Gadre Marine

Shenglong Industrial

Fujimitsu

Haibawang

QL Foods

Trans-Ocean Products (Maruha Nichiro)

Nissui

Nueva Pescanova

Thong Siek Global

Longsheng

Fuzhou Baiyang Seafood

Saint Malo

Market segment by region, regional analysis covers
North America (United States, Canada, and Mexico)
Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)
Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)
South America (Brazil, Argentina, Colombia, and Rest of South America)
Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Fish Paste-Based Products product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Fish Paste-Based Products, with price, sales quantity, revenue, and global market share of Fish Paste-Based Products from 2021 to 2026.

Chapter 3, the Fish Paste-Based Products competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Fish Paste-Based Products breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Fish Paste-Based Products market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Fish Paste-Based Products.

Chapter 14 and 15, to describe Fish Paste-Based Products sales channel, distributors, customers, research findings and conclusion.

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