

Global Fish Paste-Based Products Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Fish Paste-Based Products market size is expected to reach \$ 9205 million by 2032, rising at a market growth of 5.0% CAGR during the forecast period (2026-2032).

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 studies the global Fish Paste-Based Products production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Fish Paste-Based Products total production and demand, 2021-2032, (Kilotons)

Global Fish Paste-Based Products total production value, 2021-2032, (USD Million)

Global Fish Paste-Based Products production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Fish Paste-Based Products consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Fish Paste-Based Products domestic production, consumption, key domestic manufacturers and share

Global Fish Paste-Based Products production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Fish Paste-Based Products production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Fish Paste-Based Products production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Fish Paste-Based Products 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Fish Paste-Based Products market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) 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 Fish Paste-Based Products Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Fish Paste-Based Products Market, Segmentation by Type:

Frozen

Chilled/Fresh

Global Fish Paste-Based Products Market, Segmentation by Cooking Method:

Steamed and Boiled

Fried

Grilled/Roasted

Biomimetic

Global Fish Paste-Based Products Market, Segmentation by Raw Material Source:

Marine Fish

Freshwater Fish

Others

Global Fish Paste-Based Products Market, Segmentation by Sales Channel:

Online Sales

Offline Sales

Global Fish Paste-Based Products Market, Segmentation by Application:

Households

HoReCa

Others

Companies Profiled:

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

Key Questions Answered:

1. How big is the global Fish Paste-Based Products market?
2. What is the demand of the global Fish Paste-Based Products market?
3. What is the year over year growth of the global Fish Paste-Based Products market?
4. What is the production and production value of the global Fish Paste-Based Products market?

5. Who are the key producers in the global Fish Paste-Based Products market?
6. What are the growth factors driving the market demand?

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