

Global Frozen Surimi Paste Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Frozen Surimi Paste market size is expected to reach \$ 2722 million by 2032, rising at a market growth of 4.8% CAGR during the forecast period (2026-2032).

In 2025, global Frozen Surimi Paste sales reached approximately 1,149.29 Kilotons, with an average global market price of around US\$ 1,672 per Ton.

Frozen surimi paste is a semi-finished raw material made from deboned and skinned fish meat (typically white-meat fish and, in some cases, aquaculture species). The meat is washed to remove fat and impurities, finely refined and comminuted into a viscoelastic protein paste, and formulated with salt and/or cryoprotectants (commonly sorbitol, sucrose, and phosphate systems) to preserve functional myofibrillar proteins. The paste is then rapidly frozen under controlled low-temperature conditions and distributed via the cold chain. Its key purpose is to retain protein activity and gel-forming ability, enabling consistent texture, water-holding capacity, and "bounce" in downstream products such as fish balls, fish cakes, crab-flavored sticks, and fish sausages.

Frozen surimi paste is produced via a standardized flow of bulk fish sourcing ? low-temperature cutting/deboning/skin removal ? multi-stage washing & defatting ? refining/filtration to remove connective tissue and fine bones ? fine comminution ? cryoprotectant dosing ? portioning & packaging ? rapid freezing and cold-chain distribution, with strong focus on continuous operations, hygiene, and lot-to-lot consistency. Producers often locate near fishing ports or large processing hubs and secure white-meat fish (e.g., pollock-type species) or selected aquaculture inputs through quota-based procurement or long-term contracts. Tight control of temperature and water quality preserves protein functionality and whiteness, while formulations (sorbitol, sucrose, blended phosphates, etc.) stabilize myofibrillar proteins. Products are

typically block-frozen or IQF/rapidly frozen into standardized bricks or bagged paste for downstream plants making fish balls, crab-flavored sticks, and fish cakes. Gross margins are highly sensitive to fish input prices, seasonality/quotas, energy and cold-chain costs, and grade specifications (whiteness/gel strength): commodity frozen surimi paste commonly ~8%–20%, while higher-grade, consistently supplied products with sticky customer relationships can reach ~15%–30%, though volatility remains. Upstream includes fish resources and harvesting/aquaculture systems, ice/water utilities, cryoprotectants and packaging, refrigeration equipment, and cold-chain logistics. Midstream covers surimi processing, grading, and QA (gel strength, whiteness, moisture, microbiology). Downstream consists of surimi-based product manufacturers, foodservice ingredient supply chains, and export traders—forming a competitive structure driven by resource access + cold-chain capability + quality grading.

Market Development Opportunities & Main Driving Factors

Frozen surimi paste is propelled by a dual engine: controlled resource access and rising convenience-driven consumption. Japan's Fisheries White Paper highlights that higher prices and the time/effort required for preparation are key reasons behind declining seafood intake, while preferences are shifting toward simpler and more convenient formats; public-sector initiatives also promote cross-industry development of high-convenience seafood products. This structurally benefits frozen surimi paste as the essential base material for standardized, scalable items such as fish balls, crab sticks, and fish cakes—making it easier to embed into large-volume procurement and formulation systems. Annual and integrated reports from leading players repeatedly emphasize value-chain advantages spanning North American white-fish access, surimi (paste) processing, and multi-channel distribution—improving the replicability of the "stable input–graded supply–scaled processing" model amid global expansion of frozen and ready-to-eat channels.

Market Challenges, Risks, & Restraints

Key risks concentrate in resource/price volatility and cross-border/compliance uncertainty. Frozen surimi paste is tightly linked to white-fish resources and cold-chain economics; quotas, stock variability, FX, energy, and logistics costs can quickly translate into cost and margin swings. Broker research frequently notes that shifts in Alaska pollock supply and surimi price cycles can compress profitability, underscoring the category's cyclicity. In parallel, the Fisheries White Paper's trade and regulatory discussions point to periods of weaker export volume/value and to import restrictions or

regulatory disruptions in certain markets—showing how exogenous shocks can reshape supply–demand balance and pricing. On the product side, stricter microbiological control, allergen/labeling compliance, and customer acceptance metrics (gel strength, whiteness, off-odor control) raise the bar for QA systems and batch consistency, directly affecting order stability.

Downstream Demand Trends

Downstream demand is shifting from "buying raw input" to "buying predictable performance and supply certainty." Foodservice chains, convenience ready-to-eat channels, and household frozen foods increasingly require quantified gel strength, whiteness, and freeze–thaw stability to secure consistent texture and manufacturing yields; government-driven promotion of convenient seafood consumption further increases penetration of surimi-based standardized products. On the supply side, the winning model is moving toward resource lock-in + local processing + graded supply—converting catches into multiple surimi-paste grades near origin to match diverse customer specs, while strengthening pricing power through stable delivery and traceable quality. As convenience, branding, and global channels deepen, frozen surimi paste is increasingly positioned as a standardized marine-protein intermediate underpinning the next upgrade cycle in seafood processing and scalable expansion.

This report studies the global Frozen Surimi Paste production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Frozen Surimi Paste total production and demand, 2021-2032, (Kilotons)

Global Frozen Surimi Paste total production value, 2021-2032, (USD Million)

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

Global Frozen Surimi Paste consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Frozen Surimi Paste domestic production, consumption, key domestic manufacturers and share

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

Global Frozen Surimi Paste production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Frozen Surimi Paste production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Frozen Surimi Paste 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 Gadre Marine Export, American Seafoods, UniSea, Maruha Nichiro, Russian Fishery Company, APITOOON, Vinh Hoan, Ulka Seafoods, Trident Seafoods, Arctic Storm Management Group, 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 Frozen Surimi Paste 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 Frozen Surimi Paste Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Frozen Surimi Paste Market, Segmentation by Type:

Premium

High Grade

Standard

Commercial

Global Frozen Surimi Paste Market, Segmentation by Raw Material:

Cold Water Surimi

Tropical Surimi

Others

Global Frozen Surimi Paste Market, Segmentation by Processing Method:

Salt-free Surimi

Salted Surimi

Global Frozen Surimi Paste Market, Segmentation by Functional Indicators:

High Elasticity Type

High Whiteness Type

High Emulsification Type

Global Frozen Surimi Paste Market, Segmentation by Application:

Frozen Surimi Products

Chilled/Fresh Surimi Products

Companies Profiled:

Gadre Marine Export

American Seafoods

UniSea

Maruha Nichiro

Russian Fishery Company

APITON

Vinh Hoan

Ulka Seafoods

Trident Seafoods

Arctic Storm Management Group

QL Foods

Kien Giang Sea Product Corporation

Con Dao Seaproducts

Westward Seafoods

Nissui

Seaprimexco Vietnam

Anjoyfood

Zhejiang Haizhiwei

Haixin

Longsheng

Key Questions Answered:

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

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