

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

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Abstracts

The global Tinned Sardines market size is expected to reach \$ 2213 million by 2032, rising at a market growth of 2.5% CAGR during the forecast period (2026-2032).

Tinned sardines are a type of seafood product made primarily from sardines. After cleaning, pre-cooking, and seasoning with oil/salt water/tomato sauce, they are sealed in metal cans and sterilized at high temperatures. They are characterized by high protein content, high Omega-3 fatty acid content, long shelf life, and convenient ready-to-eat properties, making them widely used in household consumption, emergency food, and food processing. In 2025, the global sales volume of tinned sardines was 763,700 metric tons, with a unit selling price of \$2,370 per metric ton. The industry's gross profit margin ranged from 10% to 25%. The tinned sardine industry chain comprises upstream fishing resources, midstream processing and manufacturing, and downstream consumer markets. Upstream operations rely primarily on the harvesting of small fish in coastal and deep-sea waters; sardine resources exhibit distinct seasonal and regional characteristics and are significantly influenced by fluctuations in ocean temperatures and fishery quota systems, resulting in high supply volatility. The midstream processing stage represents the core of the value chain, concentrated mainly in Europe (Spain, Portugal, Italy), Southeast Asia (Thailand, the Philippines, Malaysia), and coastal China, and encompasses processes such as raw material handling, pre-cooking, seasoning, canning, and sterilization. Downstream consumption occurs through supermarket retail, e-commerce platforms, and foodservice channels; while Europe boasts a mature, traditional consumption pattern, the product serves primarily as an affordable, high-value source of basic protein in Africa, Southeast Asia, and Latin America.

Growth in the canned sardine market is primarily driven by health-conscious

consumption trends and the demand for affordable protein sources. Rich in Omega-3 fatty acids and high-quality protein, sardines are regarded as a key functional health food. Amidst a global inflationary cycle, consumers are increasingly opting for cost-effective animal protein alternatives, leading canned sardines to partially substitute for fresh fish and red meat. Meanwhile, the rising demand for convenience foods and the modernization of retail channels?particularly the expansion of e-commerce and supermarket chains?have further boosted product penetration. In developing nations, population growth and urbanization are driving a sustained expansion in the demand for staple foods, whereas in Europe, sardines benefit from a long-standing culinary tradition and stable consumption patterns. The industry's primary risks center on supply-side uncertainties. First, sardines are a highly seasonal marine resource significantly affected by climate change, sea temperatures, and ocean currents, resulting in substantial fluctuations in catch volumes. Second, increasingly stringent global fisheries management and national catch quotas may constrain supply flexibility. Third, substitute products?such as canned tuna and mackerel?pose competitive challenges regarding price and supply stability. Fourth, tightening food safety regulations, particularly stricter standards for heavy metals and contaminants, are raising compliance costs for companies. Finally, volatility in the international trade environment?including tariffs, exchange rate fluctuations, and rules of origin restrictions?significantly impacts export-oriented enterprises.

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

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

Highlights and key features of the study

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

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

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

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

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

Global Tinned Sardines production by manufacturer, production, price, value and

market share 2021-2026, (USD Million) & (Tons)

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

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

This report profiles key players in the global Tinned 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., Camil Alimentos S.A., Thai Union Group PCL, Bolton Group S.r.l., Grupo Calvo, Frinsa Group (Frinsa del Noroeste S.A.), Shanghai Maling Aquarius Co., Ltd., Dalian Leasun Food Co., Ltd., Guangdong Ganzhu Canned Foods Co., Ltd., Guangdong Eagle Coin Haibao Foods Co., Ltd., 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 Tinned 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 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 Tinned Sardines Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tinned Sardines Market, Segmentation by Type:

Sardines in Tomato Sauce

Others

Global Tinned Sardines Market, Segmentation by Product Form:

Whole Sardines

Skinless/Boneless

Global Tinned Sardines Market, Segmentation by Sales Channels:

Offline Sales

Online Sales

Global Tinned Sardines Market, Segmentation by Application:

Household Consumption

Foodservice

Others

Companies Profiled:

Century Pacific Food, Inc.

Camil Alimentos S.A.

Thai Union Group PCL

Bolton Group S.r.l.

Grupo Calvo

Frinsa Group (Frinsa del Noroeste S.A.)

Shanghai Maling Aquarius Co., Ltd.

Dalian Leasun Food Co., Ltd.

Guangdong Ganzhu Canned Foods Co., Ltd.

Guangdong Eagle Coin Haibao Foods Co., Ltd.

Xiamen Gulong Food Co., Ltd.

Tropical Food

Key Questions Answered:

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

Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

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

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

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

- 3.2 World Tinned Sardines Production by Manufacturer (2021-2026)
- 3.3 World Tinned Sardines Average Price by Manufacturer (2021-2026)
- 3.4 Tinned Sardines Company Evaluation Quadrant
- 3.5 Industry Rank and Concentration Rate (CR)
 - 3.5.1 Global Tinned Sardines Industry Rank of Major Manufacturers
 - 3.5.2 Global Concentration Ratios (CR4) for Tinned Sardines in 2025
 - 3.5.3 Global Concentration Ratios (CR8) for Tinned Sardines in 2025
- 3.6 Tinned Sardines Market: Overall Company Footprint Analysis
 - 3.6.1 Tinned Sardines Market: Region Footprint
 - 3.6.2 Tinned Sardines Market: Company Product Type Footprint
 - 3.6.3 Tinned 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: Tinned Sardines Production Value Comparison
 - 4.1.1 United States VS China: Tinned Sardines Production Value Comparison (2021 & 2025 & 2032)
 - 4.1.2 United States VS China: Tinned Sardines Production Value Market Share Comparison (2021 & 2025 & 2032)
- 4.2 United States VS China: Tinned Sardines Production Comparison
 - 4.2.1 United States VS China: Tinned Sardines Production Comparison (2021 & 2025 & 2032)
 - 4.2.2 United States VS China: Tinned Sardines Production Market Share Comparison (2021 & 2025 & 2032)
- 4.3 United States VS China: Tinned Sardines Consumption Comparison
 - 4.3.1 United States VS China: Tinned Sardines Consumption Comparison (2021 & 2025 & 2032)
 - 4.3.2 United States VS China: Tinned Sardines Consumption Market Share Comparison (2021 & 2025 & 2032)
- 4.4 United States Based Tinned Sardines Manufacturers and Market Share, 2021-2026
 - 4.4.1 United States Based Tinned Sardines Manufacturers, Headquarters and Production Site (States, Country)
 - 4.4.2 United States Based Manufacturers Tinned Sardines Production Value

(2021-2026)

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

4.5 China Based Tinned Sardines Manufacturers and Market Share

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

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

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

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

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

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

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

5 MARKET ANALYSIS BY TYPE

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

5.2 Segment Introduction by Type

5.2.1 Sardines in Tomato Sauce

5.2.2 Others

5.3 Market Segment by Type

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

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

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

6 MARKET ANALYSIS BY PRODUCT FORM

6.1 World Tinned Sardines Market Size Overview by Product Form: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Product Form

6.2.1 Whole Sardines

6.2.2 Skinless/Boneless

6.3 Market Segment by Product Form

6.3.1 World Tinned Sardines Production by Product Form (2021-2032)

6.3.2 World Tinned Sardines Production Value by Product Form (2021-2032)

6.3.3 World Tinned Sardines Average Price by Product Form (2021-2032)

7 MARKET ANALYSIS BY SALES CHANNELS

7.1 World Tinned Sardines Market Size Overview by Sales Channels: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Sales Channels

7.2.1 Offline Sales

7.2.2 Online Sales

7.3 Market Segment by Sales Channels

7.3.1 World Tinned Sardines Production by Sales Channels (2021-2032)

7.3.2 World Tinned Sardines Production Value by Sales Channels (2021-2032)

7.3.3 World Tinned Sardines Average Price by Sales Channels (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Tinned Sardines Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Household Consumption

8.2.2 Foodservice

8.2.3 Others

8.3 Market Segment by Application

8.3.1 World Tinned Sardines Production by Application (2021-2032)

8.3.2 World Tinned Sardines Production Value by Application (2021-2032)

8.3.3 World Tinned Sardines Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 Century Pacific Food, Inc.

9.1.1 Century Pacific Food, Inc. Details

9.1.2 Century Pacific Food, Inc. Major Business

9.1.3 Century Pacific Food, Inc. Tinned Sardines Product and Services

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

9.1.5 Century Pacific Food, Inc. Recent Developments/Updates

9.1.6 Century Pacific Food, Inc. Competitive Strengths & Weaknesses

9.2 Camil Alimentos S.A.

9.2.1 Camil Alimentos S.A. Details

9.2.2 Camil Alimentos S.A. Major Business

9.2.3 Camil Alimentos S.A. Tinned Sardines Product and Services

9.2.4 Camil Alimentos S.A. Tinned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 9.2.5 Camil Alimentos S.A. Recent Developments/Updates
- 9.2.6 Camil Alimentos S.A. Competitive Strengths & Weaknesses
- 9.3 Thai Union Group PCL
 - 9.3.1 Thai Union Group PCL Details
 - 9.3.2 Thai Union Group PCL Major Business
 - 9.3.3 Thai Union Group PCL Tinned Sardines Product and Services
 - 9.3.4 Thai Union Group PCL Tinned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.3.5 Thai Union Group PCL Recent Developments/Updates
 - 9.3.6 Thai Union Group PCL Competitive Strengths & Weaknesses
- 9.4 Bolton Group S.r.l.
 - 9.4.1 Bolton Group S.r.l. Details
 - 9.4.2 Bolton Group S.r.l. Major Business
 - 9.4.3 Bolton Group S.r.l. Tinned Sardines Product and Services
 - 9.4.4 Bolton Group S.r.l. Tinned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.4.5 Bolton Group S.r.l. Recent Developments/Updates
 - 9.4.6 Bolton Group S.r.l. Competitive Strengths & Weaknesses
- 9.5 Grupo Calvo
 - 9.5.1 Grupo Calvo Details
 - 9.5.2 Grupo Calvo Major Business
 - 9.5.3 Grupo Calvo Tinned Sardines Product and Services
 - 9.5.4 Grupo Calvo Tinned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.5.5 Grupo Calvo Recent Developments/Updates
 - 9.5.6 Grupo Calvo Competitive Strengths & Weaknesses
- 9.6 Frinsa Group (Frinsa del Noroeste S.A.)
 - 9.6.1 Frinsa Group (Frinsa del Noroeste S.A.) Details
 - 9.6.2 Frinsa Group (Frinsa del Noroeste S.A.) Major Business
 - 9.6.3 Frinsa Group (Frinsa del Noroeste S.A.) Tinned Sardines Product and Services
 - 9.6.4 Frinsa Group (Frinsa del Noroeste S.A.) Tinned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 9.6.5 Frinsa Group (Frinsa del Noroeste S.A.) Recent Developments/Updates
 - 9.6.6 Frinsa Group (Frinsa del Noroeste S.A.) Competitive Strengths & Weaknesses
- 9.7 Shanghai Maling Aquarius Co., Ltd.
 - 9.7.1 Shanghai Maling Aquarius Co., Ltd. Details
 - 9.7.2 Shanghai Maling Aquarius Co., Ltd. Major Business
 - 9.7.3 Shanghai Maling Aquarius Co., Ltd. Tinned Sardines Product and Services
 - 9.7.4 Shanghai Maling Aquarius Co., Ltd. Tinned Sardines Production, Price, Value,

Gross Margin and Market Share (2021-2026)

9.7.5 Shanghai Maling Aquarius Co., Ltd. Recent Developments/Updates

9.7.6 Shanghai Maling Aquarius Co., Ltd. Competitive Strengths & Weaknesses

9.8 Dalian Leasun Food Co., Ltd.

9.8.1 Dalian Leasun Food Co., Ltd. Details

9.8.2 Dalian Leasun Food Co., Ltd. Major Business

9.8.3 Dalian Leasun Food Co., Ltd. Tinned Sardines Product and Services

9.8.4 Dalian Leasun Food Co., Ltd. Tinned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.8.5 Dalian Leasun Food Co., Ltd. Recent Developments/Updates

9.8.6 Dalian Leasun Food Co., Ltd. Competitive Strengths & Weaknesses

9.9 Guangdong Ganzhu Canned Foods Co., Ltd.

9.9.1 Guangdong Ganzhu Canned Foods Co., Ltd. Details

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

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

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

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

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

9.10 Guangdong Eagle Coin Haibao Foods Co., Ltd.

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

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

9.10.3 Guangdong Eagle Coin Haibao Foods Co., Ltd. Tinned Sardines Product and Services

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

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

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

9.11 Xiamen Gulong Food Co., Ltd.

9.11.1 Xiamen Gulong Food Co., Ltd. Details

9.11.2 Xiamen Gulong Food Co., Ltd. Major Business

9.11.3 Xiamen Gulong Food Co., Ltd. Tinned Sardines Product and Services

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

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

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

9.12 Tropical Food

9.12.1 Tropical Food Details

9.12.2 Tropical Food Major Business

9.12.3 Tropical Food Tinned Sardines Product and Services

9.12.4 Tropical Food Tinned Sardines Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Tropical Food Recent Developments/Updates

9.12.6 Tropical Food Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Tinned Sardines Industry Chain

10.2 Tinned Sardines Upstream Analysis

10.2.1 Tinned Sardines Core Raw Materials

10.2.2 Main Manufacturers of Tinned Sardines Core Raw Materials

10.3 Midstream Analysis

10.4 Downstream Analysis

10.5 Tinned Sardines Production Mode

10.6 Tinned Sardines Procurement Model

10.7 Tinned Sardines Industry Sales Model and Sales Channels

10.7.1 Tinned Sardines Sales Model

10.7.2 Tinned Sardines Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology

12.2 Research Process and Data Source

12.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Tinned Sardines Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Tinned Sardines Production Value by Region (2021-2026) & (USD Million)

Table 3. World Tinned Sardines Production Value by Region (2027-2032) & (USD Million)

Table 4. World Tinned Sardines Production Value Market Share by Region (2021-2026)

Table 5. World Tinned Sardines Production Value Market Share by Region (2027-2032)

Table 6. World Tinned Sardines Production by Region (2021-2026) & (Tons)

Table 7. World Tinned Sardines Production by Region (2027-2032) & (Tons)

Table 8. World Tinned Sardines Production Market Share by Region (2021-2026)

Table 9. World Tinned Sardines Production Market Share by Region (2027-2032)

Table 10. World Tinned Sardines Average Price by Region (2021-2026) & (US\$/Ton)

Table 11. World Tinned Sardines Average Price by Region (2027-2032) & (US\$/Ton)

Table 12. Tinned Sardines Major Market Trends

Table 13. World Tinned Sardines Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Tons)

Table 14. World Tinned Sardines Consumption by Region (2021-2026) & (Tons)

Table 15. World Tinned Sardines Consumption Forecast by Region (2027-2032) & (Tons)

Table 16. World Tinned Sardines Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Tinned Sardines Producers in 2025

Table 18. World Tinned Sardines Production by Manufacturer (2021-2026) & (Tons)

Table 19. Production Market Share of Key Tinned Sardines Producers in 2025

Table 20. World Tinned Sardines Average Price by Manufacturer (2021-2026) & (US\$/Ton)

Table 21. Global Tinned Sardines Company Evaluation Quadrant

Table 22. World Tinned Sardines Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Tinned Sardines Production Site of Key Manufacturer

Table 24. Tinned Sardines Market: Company Product Type Footprint

Table 25. Tinned Sardines Market: Company Product Application Footprint

Table 26. Tinned Sardines Competitive Factors

Table 27. Tinned Sardines New Entrant and Capacity Expansion Plans

Table 28. Tinned Sardines Mergers & Acquisitions Activity

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Table 54. World Tinned Sardines Production Value by Product Form, (USD Million), 2021 & 2025 & 2032

Table 55. World Tinned Sardines Production by Product Form (2021-2026) & (Tons)

Table 56. World Tinned Sardines Production by Product Form (2027-2032) & (Tons)

Table 57. World Tinned Sardines Production Value by Product Form (2021-2026) & (USD Million)

Table 58. World Tinned Sardines Production Value by Product Form (2027-2032) & (USD Million)

Table 59. World Tinned Sardines Average Price by Product Form (2021-2026) & (US\$/Ton)

Table 60. World Tinned Sardines Average Price by Product Form (2027-2032) & (US\$/Ton)

Table 61. World Tinned Sardines Production Value by Sales Channels, (USD Million), 2021 & 2025 & 2032

Table 62. World Tinned Sardines Production by Sales Channels (2021-2026) & (Tons)

Table 63. World Tinned Sardines Production by Sales Channels (2027-2032) & (Tons)

Table 64. World Tinned Sardines Production Value by Sales Channels (2021-2026) & (USD Million)

Table 65. World Tinned Sardines Production Value by Sales Channels (2027-2032) & (USD Million)

Table 66. World Tinned Sardines Average Price by Sales Channels (2021-2026) & (US\$/Ton)

Table 67. World Tinned Sardines Average Price by Sales Channels (2027-2032) & (US\$/Ton)

Table 68. World Tinned Sardines Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Tinned Sardines Production by Application (2021-2026) & (Tons)

Table 70. World Tinned Sardines Production by Application (2027-2032) & (Tons)

Table 71. World Tinned Sardines Production Value by Application (2021-2026) & (USD Million)

Table 72. World Tinned Sardines Production Value by Application (2027-2032) & (USD Million)

Million)

Table 73. World Tinned Sardines Average Price by Application (2021-2026) & (US\$/Ton)

Table 74. World Tinned Sardines Average Price by Application (2027-2032) & (US\$/Ton)

Table 75. Century Pacific Food, Inc. Basic Information, Manufacturing Base and Competitors

Table 76. Century Pacific Food, Inc. Major Business

Table 77. Century Pacific Food, Inc. Tinned Sardines Product and Services

Table 78. Century Pacific Food, Inc. Tinned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Century Pacific Food, Inc. Recent Developments/Updates

Table 80. Century Pacific Food, Inc. Competitive Strengths & Weaknesses

Table 81. Camil Alimentos S.A. Basic Information, Manufacturing Base and Competitors

Table 82. Camil Alimentos S.A. Major Business

Table 83. Camil Alimentos S.A. Tinned Sardines Product and Services

Table 84. Camil Alimentos S.A. Tinned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Camil Alimentos S.A. Recent Developments/Updates

Table 86. Camil Alimentos S.A. Competitive Strengths & Weaknesses

Table 87. Thai Union Group PCL Basic Information, Manufacturing Base and Competitors

Table 88. Thai Union Group PCL Major Business

Table 89. Thai Union Group PCL Tinned Sardines Product and Services

Table 90. Thai Union Group PCL Tinned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. Thai Union Group PCL Recent Developments/Updates

Table 92. Thai Union Group PCL Competitive Strengths & Weaknesses

Table 93. Bolton Group S.r.l. Basic Information, Manufacturing Base and Competitors

Table 94. Bolton Group S.r.l. Major Business

Table 95. Bolton Group S.r.l. Tinned Sardines Product and Services

Table 96. Bolton Group S.r.l. Tinned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. Bolton Group S.r.l. Recent Developments/Updates

Table 98. Bolton Group S.r.l. Competitive Strengths & Weaknesses

Table 99. Grupo Calvo Basic Information, Manufacturing Base and Competitors

Table 100. Grupo Calvo Major Business

Table 101. Grupo Calvo Tinned Sardines Product and Services

Table 102. Grupo Calvo Tinned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. Grupo Calvo Recent Developments/Updates

Table 104. Grupo Calvo Competitive Strengths & Weaknesses

Table 105. Frinsa Group (Frinsa del Noroeste S.A.) Basic Information, Manufacturing Base and Competitors

Table 106. Frinsa Group (Frinsa del Noroeste S.A.) Major Business

Table 107. Frinsa Group (Frinsa del Noroeste S.A.) Tinned Sardines Product and Services

Table 108. Frinsa Group (Frinsa del Noroeste S.A.) Tinned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 109. Frinsa Group (Frinsa del Noroeste S.A.) Recent Developments/Updates

Table 110. Frinsa Group (Frinsa del Noroeste S.A.) Competitive Strengths & Weaknesses

Table 111. Shanghai Maling Aquarius Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 112. Shanghai Maling Aquarius Co., Ltd. Major Business

Table 113. Shanghai Maling Aquarius Co., Ltd. Tinned Sardines Product and Services

Table 114. Shanghai Maling Aquarius Co., Ltd. Tinned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Shanghai Maling Aquarius Co., Ltd. Recent Developments/Updates

Table 116. Shanghai Maling Aquarius Co., Ltd. Competitive Strengths & Weaknesses

Table 117. Dalian Leasun Food Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 118. Dalian Leasun Food Co., Ltd. Major Business

Table 119. Dalian Leasun Food Co., Ltd. Tinned Sardines Product and Services

Table 120. Dalian Leasun Food Co., Ltd. Tinned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Dalian Leasun Food Co., Ltd. Recent Developments/Updates

Table 122. Dalian Leasun Food Co., Ltd. Competitive Strengths & Weaknesses

Table 123. Guangdong Ganzhu Canned Foods Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 124. Guangdong Ganzhu Canned Foods Co., Ltd. Major Business

Table 125. Guangdong Ganzhu Canned Foods Co., Ltd. Tinned Sardines Product and Services

Table 126. Guangdong Ganzhu Canned Foods Co., Ltd. Tinned Sardines Production

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

Table 127. Guangdong Ganzhu Canned Foods Co., Ltd. Recent Developments/Updates

Table 128. Guangdong Ganzhu Canned Foods Co., Ltd. Competitive Strengths & Weaknesses

Table 129. Guangdong Eagle Coin Haibao Foods Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 130. Guangdong Eagle Coin Haibao Foods Co., Ltd. Major Business

Table 131. Guangdong Eagle Coin Haibao Foods Co., Ltd. Tinned Sardines Product and Services

Table 132. Guangdong Eagle Coin Haibao Foods Co., Ltd. Tinned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Guangdong Eagle Coin Haibao Foods Co., Ltd. Recent Developments/Updates

Table 134. Guangdong Eagle Coin Haibao Foods Co., Ltd. Competitive Strengths & Weaknesses

Table 135. Xiamen Gulong Food Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 136. Xiamen Gulong Food Co., Ltd. Major Business

Table 137. Xiamen Gulong Food Co., Ltd. Tinned Sardines Product and Services

Table 138. Xiamen Gulong Food Co., Ltd. Tinned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. Xiamen Gulong Food Co., Ltd. Recent Developments/Updates

Table 140. Xiamen Gulong Food Co., Ltd. Competitive Strengths & Weaknesses

Table 141. Tropical Food Basic Information, Manufacturing Base and Competitors

Table 142. Tropical Food Major Business

Table 143. Tropical Food Tinned Sardines Product and Services

Table 144. Tropical Food Tinned Sardines Production (Tons), Price (US\$/Ton), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Tropical Food Recent Developments/Updates

Table 146. Tropical Food Competitive Strengths & Weaknesses

Table 147. Global Key Players of Tinned Sardines Upstream (Raw Materials)

Table 148. Global Tinned Sardines Typical Customers

Table 149. Tinned Sardines Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Tinned Sardines Picture

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

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

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

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

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

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

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

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

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

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

Figure 12. Tinned Sardines Market Drivers

Figure 13. Factors Affecting Demand

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Comparison (2021 & 2025 & 2032)

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

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

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

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

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

Figure 34. Sardines in Tomato Sauce

Figure 35. Others

Figure 36. World Tinned Sardines Production Market Share by Type (2021-2032)

Figure 37. World Tinned Sardines Production Value Market Share by Type (2021-2032)

Figure 38. World Tinned Sardines Average Price by Type (2021-2032) & (US\$/Ton)

Figure 39. World Tinned Sardines Production Value by Product Form, (USD Million), 2021 & 2025 & 2032

Figure 40. World Tinned Sardines Production Value Market Share by Product Form in 2025

Figure 41. Whole Sardines

Figure 42. Skinless/Boneless

Figure 43. World Tinned Sardines Production Market Share by Product Form (2021-2032)

Figure 44. World Tinned Sardines Production Value Market Share by Product Form (2021-2032)

Figure 45. World Tinned Sardines Average Price by Product Form (2021-2032) & (US\$/Ton)

Figure 46. World Tinned Sardines Production Value by Sales Channels, (USD Million), 2021 & 2025 & 2032

Figure 47. World Tinned Sardines Production Value Market Share by Sales Channels in 2025

Figure 48. Offline Sales

Figure 49. Online Sales

Figure 50. World Tinned Sardines Production Market Share by Sales Channels (2021-2032)

Figure 51. World Tinned Sardines Production Value Market Share by Sales Channels (2021-2032)

Figure 52. World Tinned Sardines Average Price by Sales Channels (2021-2032) & (US\$/Ton)

Figure 53. World Tinned Sardines Production Value by Application, (USD Million), 2021

& 2025 & 2032

Figure 54. World Tinned Sardines Production Value Market Share by Application in 2025

Figure 55. Household Consumption

Figure 56. Foodservice

Figure 57. Others

Figure 58. World Tinned Sardines Production Market Share by Application (2021-2032)

Figure 59. World Tinned Sardines Production Value Market Share by Application (2021-2032)

Figure 60. World Tinned Sardines Average Price by Application (2021-2032) & (US\$/Ton)

Figure 61. Tinned Sardines Industry Chain

Figure 62. Tinned Sardines Procurement Model

Figure 63. Tinned Sardines Sales Model

Figure 64. Tinned Sardines Sales Channels, Direct Sales, and Distribution

Figure 65. Methodology

Figure 66. Research Process and Data Source

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