

# **European Frozen Seafood Market Report by Product Type (Groundfish, Small Pelagics, Tuna and Tuna like Species, Salmonids, Bivalves and Other Molluscs, and Aquatic Invertebrates, Crustaceans, Other Marine Fish, Cephalapods, Freshwater Fish, and Others), Distribution Channel (Discount Retailers, Supermarkets and Hypermarkets, Specialty Stores, and Others), and Country 2024-2032**

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## **Abstracts**

The European frozen seafood market size reached US\$ 25.1 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 31.9 Billion by 2032, exhibiting a growth rate (CAGR) of 2.6% during 2024-2032. The nutritional benefits associated with the consumption of frozen seafood, convenience and accessibility, extended shelf life, improved freezing technologies to ensure that frozen seafood retains its freshness, texture, and flavor,, are among the key factors driving the market growth.

Frozen seafood refers to various types of marine and aquatic life that have been preserved through freezing processes, maintaining their freshness and quality over an extended period. This method involves rapidly lowering the temperature of seafood to below freezing point, typically around -18°C (0°F), to halt the growth of microorganisms and enzymes that cause spoilage. By doing so, the natural flavors, textures, and nutritional value of the seafood are preserved, making frozen seafood an excellent option for consumers seeking convenience without compromising on taste and health benefits.

Frozen seafood offers consumers the convenience of having a wide range of seafood

options available year-round, regardless of the species' seasonal availability. This factor is especially appealing in regions where access to fresh seafood is limited. Additionally, the freezing process effectively preserves the quality, taste, and nutritional content of seafood, extending its shelf life and reducing the risk of spoilage. This appeals to consumers who wish to minimize food waste and maintain a longer-term supply of seafood. Other than this, frozen seafood is a rich source of essential nutrients, including Omega-3 fatty acids, proteins, and vitamins. Health-conscious consumers value these nutritional benefits, which contribute to heart health, brain function, and overall well-being. Besides this, frozen seafood can be used in a variety of culinary creations, ranging from quick and easy meals to elaborate dishes. This versatility appeals to both home cooks and professional chefs, driving demand across different market segments. In line with this, European consumers have access to a wide range of frozen seafood options from various parts of the world. This global supply chain ensures a diverse selection of seafood species and products, catering to diverse tastes and preferences. Furthermore, as environmental concerns grow, consumers are seeking sustainably sourced seafood. The frozen seafood industry responds by adopting sustainable fishing practices and certifications, appealing to ethically conscious consumers. Moreover, advancements in freezing techniques, such as rapid freezing methods like blast freezing, ensure that frozen seafood retains its freshness, texture, and flavor, closely resembling that of fresh seafood.

#### European Frozen Seafood Market Trends/Drivers: Extended Shelf Life

By undergoing rapid freezing processes, seafood's freshness is locked in, ensuring that it remains in an optimal condition for an extended period. This aspect is especially beneficial for households, restaurants, and food service establishments that require a consistent supply of seafood without frequent trips to the market. The extended shelf life reduces the need for frequent restocking and enables consumers to enjoy high-quality seafood at their convenience. This aspect not only adds convenience but also contributes to cost savings and sustainability efforts.

#### Improved Freezing Technologies

Rapid freezing methods, such as blast freezing, freeze seafood at ultra-low temperatures quickly. This minimizes the formation of large ice crystals that can compromise the texture and integrity of the seafood. As a result, frozen seafood closely resembles the taste, texture, and nutritional content of fresh seafood. The improved freezing technologies contribute to the overall appeal of frozen seafood, as consumers

can enjoy a culinary experience that is remarkably close to that of freshly caught seafood. This technological progress has elevated frozen seafood from being a mere convenience option to a viable alternative that maintains the essence of the ocean's bounty.

#### European Frozen Seafood Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the European frozen seafood market report, along with forecasts at the regional and country levels for 2024-2032. Our report has categorized the market based on product type and distribution channel.

#### Breakup by Product Type:

- Groundfish
- Small Pelagics
- Tuna and Tuna like Species
- Salmonids
- Bivalves and Other Molluscs, and Aquatic Invertebrates
- Crustaceans
- Other Marine Fish
- Cephalapods
- Freshwater Fish
- Others

Groundfish represents the most widely used product type

The report has provided a detailed breakup and analysis of the market based on the product type. This groundfish, small pelagics, tuna and tuna like species, salmonids, bivalves and other molluscs, and aquatic invertebrates, crustaceans, other marine fish, cephalapods, freshwater fish, and others. According to the report, groundfish represented the largest segment.

Groundfish encompasses a diverse range of species, including cod, haddock, pollock, and sole, among others, making it a versatile category that appeals to a wide consumer base with varying taste preferences. Additionally, groundfish species are widely distributed and harvested in different regions, ensuring a consistent supply throughout the year. This availability is a crucial factor in meeting consumer demand, especially when compared to certain seasonal seafood varieties. Furthermore, groundfish is known for its adaptability in various culinary applications, from classic fish and chips to

gourmet preparations. This versatility makes groundfish an attractive option for both home cooks and professional chefs, contributing to its popularity.

#### Breakup by Distribution Channel:

- Discount Retailers
- Supermarkets and Hypermarkets
- Specialty Stores
- Others

Discount retailers account for the majority of the market share

A detailed breakup and analysis of the market based on the distribution channel has also been provided in the report. This includes discount retailers, supermarkets and hypermarkets specialty stores, and others. According to the report, the discount retailers accounted for the largest market share.

Discount retailers specialize in offering products at competitive prices, which resonates with cost-conscious consumers seeking value for their money. Frozen seafood products, while maintaining their quality and nutritional benefits, can often be more affordable in discount retail settings compared to specialty stores. Besides this, frozen seafood aligns well with the bulk purchasing behavior often observed in discount retailers. Consumers can buy larger quantities of frozen seafood products, ensuring a steady supply over time while benefiting from lower unit costs. Additionally, discount retailers boast an extensive network of outlets, making them highly accessible to a wide range of consumers. This accessibility contributes to the high visibility and availability of frozen seafood products, further driving their demand.

#### Breakup by Country:

- Poland
- Spain
- Italy
- Portugal
- Germany
- United Kingdom
- France
- Others

Spain exhibits a clear dominance in the market

A detailed breakup and analysis of the market has been provided based on country, including Poland, Spain, Italy, Portugal, Germany, the United Kingdom, France and others. According to the report, Spain was the largest market for European frozen seafood.

Extensive coast line and rich maritime heritage of Spain have facilitated a robust seafood industry. Spanish companies are known for their diverse offerings, including frozen fish, shellfish, and value-added seafood products. With a blend of traditional expertise and modern processing techniques, Spain continues to be a key supplier of frozen seafood products across Europe.

#### Competitive Landscape:

Leading companies have prioritized responsible fishing practices and sustainable sourcing. They collaborate with fisheries and organizations to ensure that the seafood they offer is harvested in an environmentally friendly and ethically responsible manner. This commitment to sustainability resonates with conscious consumers and supports the long-term health of marine ecosystems. Additionally, key players continually expand their product portfolios to include a wide range of frozen seafood options. They introduce value-added products, such as ready-to-cook kits, pre-seasoned fillets, and innovative seafood combinations, catering to consumers' demand for convenience and culinary exploration. Other than this, these companies invest in stringent quality control processes to maintain the highest standards for frozen seafood. Rigorous testing and quality checks ensure that products retain their freshness, taste, and nutritional value, establishing trust with consumers. Besides this, market leaders leverage cutting-edge freezing and packaging technologies to enhance the quality of frozen seafood. Innovations like rapid freezing methods and advanced packaging materials help preserve seafood's texture and flavor, closely resembling that of fresh catches.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided.

#### Key Questions Answered in This Report

1. What was the size of the European frozen seafood market in 2023?
2. What is the expected growth rate of the European frozen seafood market during 2024-2032?

3. What are the key factors driving the European frozen seafood market?
4. What has been the impact of COVID-19 on the European frozen seafood market?
5. What is the breakup of the European frozen seafood market based on the product type?
6. What is the breakup of the European frozen seafood market based on the distribution channel?
7. What are the key regions in the European frozen seafood market?

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