

# **Salmon Market Report by Type (Farmed, Wild Captured), Species (Atlantic, Pink, Chum/Dog, Coho, Sockeye, and Others), End Product Type (Frozen, Fresh, Canned, and Others), Distribution Channel (Foodservice, Retail), and Region 2024-2032**

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## **Abstracts**

The global salmon market size reached 3.6 Million Tons in 2023. Looking forward, IMARC Group expects the market to reach 4.8 Million Tons by 2032, exhibiting a growth rate (CAGR) of 3.1% during 2024-2032. The rising seafood consumption worldwide, increasing consumer disposable incomes in emerging economies, favorable government policies, and escalating demand for value-added salmon products are some of the major factors propelling the market.

Salmon is a species of fish renowned for its high nutritional value and rich flavor profile. It is one of the most popular types of seafood consumed globally. Belonging to the family Salmonidae, these fish are native to the cold waters of the North Atlantic and Pacific Oceans. They are a vital resource for commercial fishing and aquaculture, which are continuously monitored to ensure sustainability. These fish are a significant source of protein, Omega-3 fatty acids, and essential vitamins, making them a cornerstone of various healthy diets. Amid the rising demand for salmon worldwide, sustainable farming practices and responsible fishing techniques are being implemented to protect the species from overfishing.

The escalating seafood consumption globally, coupled with the rise in consumer disposable incomes in emerging economies, will stimulate the growth of the salmon market during the forecast period. This uptick in financial capacity allows a broader population segment to afford premium seafood options, such as salmon. Besides this, the growing influence of culinary trends, especially those propagated through social

media and food channels, is contributing to market expansion. The gastronomic appeal of salmon, ranging from sushi to smoked variants, captivates a global audience, enhancing consumer interest. Additionally, trade liberalization plays a significant role in augmenting the market growth. Favorable government policies, including reduced tariffs and streamlined export-import procedures, facilitate the global trade of salmon, enabling market expansion into previously untapped regions. Furthermore, the increasing trend of online grocery shopping, accelerated by the COVID-19 pandemic, allows for a more convenient purchasing experience, making it easier for consumers to add salmon to their diets. Along with this, the launch of value-added products like ready-to-eat salmon and marinated versions is attracting a wider demographic seeking convenience and nutrition, thus propelling the market growth. Moreover, certification systems, such as the Marine Stewardship Council (MSC) and Aquaculture Stewardship Council (ASC), lend credibility to sustainably sourced salmon, appealing to environmentally conscious consumers, thereby fueling the market growth.

#### Salmon Market Trends/Drivers:

##### Rise in Awareness About Health Benefits of Salmon

One of the most significant factors driving the salmon market is the increasing consumer awareness about the health benefits associated with salmon consumption. Rich in essential nutrients like Omega-3 fatty acids, protein, and various vitamins, salmon has gained recognition for its positive impact on cardiovascular health, cognitive function, and overall well-being. Public health campaigns and endorsements from healthcare professionals are further magnifying this awareness, steering people toward healthier food choices. This has, in turn, led to elevated demand for salmon as consumers prioritize nutritional value in their diets. The health-conscious trend is particularly noticeable among middle-aged and older demographics, who are more likely to have concerns about heart health.

##### Advancements in Aquaculture Technologies

The global salmon industry is significantly benefiting from continuous advancements in aquaculture technologies. Innovations in aquaculture technologies are enabling more efficient and sustainable farming practices, thereby increasing supply. For instance, advancements such as recirculating aquaculture systems (RAS) and enhanced fish feed are leading to higher yields and better-quality fish. These technological improvements are addressing environmental concerns related to aquaculture, such as water pollution and the overuse of antibiotics. As a result, the industry is becoming more sustainable, which helps enhance production capabilities and appeals to

environmentally conscious consumers, thereby driving the market growth further.

## Global Expansion of Seafood Retail Chains and Restaurants

The proliferating number of seafood-focused retail chains and restaurants is another critical factor contributing to the market growth. These establishments often feature an array of salmon-based dishes catering to various tastes and culinary traditions. As these chains expand, they adopt localized menus to appeal to regional preferences, thereby broadening the consumer base for salmon. Moreover, their expansion into new markets, especially in emerging economies, is facilitating greater consumer exposure to salmon. Many of these chains also offer take-out and delivery services, further enhancing consumer convenience and expanding their reach. The growing trend of online ordering and food delivery apps has made it even easier for consumers to access salmon-based meals, fueling their consumption. This increased visibility boosts awareness and availability, ultimately elevating the global demand for this nutritious fish.

### Salmon Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global salmon market report, along with forecasts at the global and Country levels from 2024-2032. Our report has categorized the market based on type, species, end product type and distribution channel.

### Breakup by Type:

Farmed

Wild Captured

Farmed salmon dominates the market

The report has provided a detailed breakup and analysis of the market based on the type. This includes farmed and wild captured. According to the report, farmed represented the largest segment.

Farmed salmon are grown in the controlled environment of aquaculture, which allows for a more predictable and consistent supply, effectively meeting the ever-increasing consumer demand. Unlike wild-caught salmon, which is subject to seasonal variations and environmental factors, farmed salmon can be produced year-round. This consistency is especially vital for retailers and restaurants that require a stable supply to meet consumer expectations. Also, advancements in aquaculture technologies have led

to improved yields and better-quality fish. Techniques like recirculating aquaculture systems (RAS) and optimized fish feed have enhanced the efficiency of salmon farming, making it a more economically viable option than relying solely on wild-caught salmon.

Moreover, farmed salmon can be more easily monitored for health and quality, ensuring that the product meets stringent food safety standards. This aspect is particularly appealing to consumers who are concerned about the traceability and safety of their food. Additionally, farming practices can be modified to produce salmon with specific desired traits, such as higher levels of Omega-3 fatty acids, thereby tailoring the product to meet evolving consumer demands. These factors combined make farmed salmon a reliable, high-quality, and increasingly sustainable option for consumers worldwide, thus propelling the segment growth.

#### Breakup by Species:

- Atlantic
- Pink
- Chum/Dog
- Coho
- Sockeye
- Others

Atlantic represents the most popular species

A detailed breakup and analysis of the market based on the species has also been provided in the report. This includes Atlantic, pink, chum/dog, coho, sockeye, and others. According to the report, Atlantic accounted for the largest market share.

Atlantic salmon has a versatile flavor profile that appeals to a broad range of consumers. Its mild taste and tender texture make it an ideal choice for various culinary applications, from grilling and smoking to use in sushi and sashimi. This versatility boosts its popularity in diverse markets and among different cultural cuisines. In addition, Atlantic salmon is particularly well-suited for aquaculture. It adapts well to farmed conditions, allowing for efficient and sustainable production. Unlike some salmon species, Atlantic salmon can be more easily bred and raised in controlled environments, contributing to its widespread availability. This abundant supply aligns well with the growing global demand, making it a go-to option for both producers and consumers.

Furthermore, strong marketing efforts have positioned Atlantic salmon as a premium yet accessible choice. The fish enjoys extensive visibility in supermarkets, seafood retailers, and restaurants, often prominently labeled as a quality option. This has established a perception of Atlantic salmon as a high-value product, further elevating its demand and supporting the growth of this segment.

#### Breakup by End Product Type:

- Frozen
- Fresh
- Canned
- Others

Frozen holds the largest share in the market

The report has provided a detailed breakup and analysis of the market based on the end product type. This includes frozen, fresh, canned, and others. According to the report, frozen represented the largest segment.

Frozen salmon is highly preferred as it caters to both consumer needs and logistical practicalities. The freezing process effectively preserves the nutritional value, texture, and flavor of the salmon, offering consumers a product that is nearly comparable to fresh variants in quality. This ensures that people can enjoy salmon's health benefits, regardless of location or proximity to fishing grounds. Moreover, frozen salmon provides exceptional convenience. It allows consumers the flexibility to store the product for extended periods without concern for rapid spoilage, thereby reducing food waste. This is particularly advantageous for households and food service providers who require a longer shelf life for planning and inventory management.

From a supply chain perspective, frozen salmon is easier and more cost-effective to transport and distribute. Unlike fresh salmon, which demands sophisticated cold-chain logistics and rapid transit to maintain quality, frozen salmon is less perishable and more resilient to varying transport conditions. This allows producers to reach a broader market, including regions far removed from coastal areas where salmon is typically harvested, thus fueling the segment growth.

#### Breakup by Distribution Channel:

- Foodservice

## Retail

Foodservice accounts 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 foodservice and retail. According to the report, foodservice accounted for the largest market share.

The main factors driving this segment's growth are the versatility and culinary appeal of salmon, which make it a staple item in various types of dining establishments, ranging from fast-casual eateries to fine-dining restaurants. Thus, salmon's flexibility in preparation methods—from grilling and baking to raw applications like sushi—adds to its growing popularity. Additionally, the rising trend of eating out or ordering prepared meals offers a convenient option for consumers who may not have the time or skills to cook salmon at home. This convenience factor further drives demand in the food service sector, where consumers can enjoy a range of salmon-based dishes without the hassle of preparation.

The food service industry also benefits from economies of scale, allowing for bulk purchasing and preparation. This results in cost efficiencies that can make salmon dishes more affordable or profitable for these establishments, enhancing their ability to effectively market and sell salmon-based offerings. Furthermore, the rise of food delivery services has expanded the reach of food service operators, making salmon dishes accessible to consumers who prefer dining at home. The ease of ordering through apps and websites further facilitates this trend, bringing the food service industry to the forefront as the dominant channel for salmon distribution.

Breakup by Region:

Based on Production:

Farmed:

Norway

Chile

Scotland

Canada

Faroe Islands

Others



Wild Captured:

United States

Russia

Japan

Canada

Others

Norway and the United States represent the leading producer of farmed and wild captured salmon respectively

The market research report has also provided a comprehensive analysis of all the major regional markets based on production, which include farmed (Norway, Chile, Scotland, Canada, Faroe Islands, and others) and wild captured (the United States, Russia, Japan, Canada, and others). According to the report, Norway was the largest market for farmed salmon and the United States was the largest market for wild captured salmon.

Norway held the biggest share in the market for farmed salmon since, geographically, the region's extensive coastline, featuring deep fjords and cold, clean waters, provides an optimal natural environment for salmon farming. These conditions have catalyzed the development of advanced aquaculture technologies and practices, further promoting the growth of the farmed salmon industry in the region. Moreover, Norway benefits from strong governmental support and well-established regulations, facilitating a sustainable and efficient production framework. These factors have helped Norway build a robust infrastructure for salmon farming, making it the largest market for farmed salmon based on production.

On the other hand, the United States was the largest market for wild-caught salmon, primarily because of its access to the rich fishing grounds of the North Pacific, especially off the coast of Alaska. The region is also home to significant populations of various salmon species, particularly sockeye, coho, and king salmon. Stringent regulations and conservation efforts have made wild-captured fishing in the United States a relatively sustainable practice, bolstering its reputation and consumer appeal for wild-caught products. Furthermore, the region has a strong preference for wild-caught salmon, often viewed as a more natural and flavorful option compared to farmed variants. This consumer perception, combined with abundant natural resources, positions the United States at the forefront of wild-captured salmon production.

## Breakup by Region

Based on Consumption:

European Union

Russia

United States

Brazil

Japan

China

Others

European Union exhibits a clear dominance in the market based on consumption

The market research report has also provided a comprehensive analysis of all the major regional markets based on consumption, which include the European Union, Russia, the United States, Brazil, Japan, China, and others. According to the report, the European Union accounted for the largest market share.

The European Union held the biggest market share based on consumption since there is a strong cultural affinity for seafood, including salmon, in many European countries. Whether it is smoked salmon in the United Kingdom, gravlax in Scandinavia, or salmon pasta dishes in Italy, the fish holds a central place in various European cuisines. This widespread culinary inclusion propels the demand for salmon across the EU. Moreover, the European Union benefits from proximity to major salmon-producing countries like Norway and Scotland, ensuring a stable and abundant supply. The well-established trade routes and favorable trade agreements within the EU make it easier and more cost-effective to distribute salmon across member countries.

Besides this, the high standard of living and elevated consumer disposable incomes in several EU countries enable consumers to afford premium protein sources like salmon. This financial capacity, coupled with a heightened awareness of the health benefits of Omega-3 fatty acids found in salmon, drives consumer choice toward this nutritious fish. Also, the EU has stringent food safety and quality regulations, and sustainably farmed and wild-caught salmon often meet these high standards. This ensures consumer trust and further boosts demand for salmon products, thus fostering market growth.

## Competitive Landscape:

The market is witnessing steady growth as key players engage in various strategic



activities to maintain their competitive edge. They are focusing on sustainability initiatives as environmentally conscious consumers increasingly demand eco-friendly practices. Many companies are also investing in sustainable aquaculture technologies like Recirculating Aquaculture Systems (RAS) and eco-friendly feed options to minimize their environmental impact. Innovation is another area of focus. From genetic research aimed at breeding disease-resistant salmon to developing new, value-added products like pre-marinated or ready-to-eat options, companies are continually looking to innovate. These new offerings meet evolving consumer demands while providing higher profit margins for producers. Mergers and acquisitions (M&A) are also a common strategy among market leaders to quickly expand their production capacities, diversify their product portfolios, and gain access to new markets. Additionally, companies are expanding their distribution channels to reach a broader consumer base. With the rise of online shopping, many key players are entering e-commerce by listing their products on popular platforms or setting up their own online storefronts. Moreover, marketing and brand-building efforts are being amplified. Through effective marketing campaigns, including social media promotions and partnerships with chefs or food influencers, companies are working to establish themselves as trusted, quality-focused brands in the eyes of consumers.

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. Some of the key players in the market include:

Cermaq Group ASA  
Leroy Seafood Group ASA  
Mowi ASA  
SalMar ASA

#### Recent Developments:

In February 2023, Cermaq Group ASA announced that it is testing a new combined sea site for salmon and kelp production. This innovative approach aims to explore the potential benefits of integrating these two types of aquaculture, contributing to the green shift. The specific location of the site is in Steigen, Nordland, and it is designed to create a synergistic relationship between salmon farming and kelp harvesting.

In May 2022, SalMar ASA, one of the world's leading producers of Atlantic salmon, acquired Norway Royal Salmon, creating the second-largest Atlantic salmon farming business globally. This acquisition will create a strong dividend capacity and substantial synergies for the shareholders.

In June 2020, UK-based seafood exporter Ideal Foods Ltd. signed a new supply

agreement with Mowi ASA, the Norwegian salmon giant, to increase its stock availability by an extra 5,000 tons per year. This new partnership aims to improve product availability and meet the global demand for Atlantic salmon.

#### Key Questions Answered in This Report

1. How big is the salmon market?
2. What are the key factors driving the global salmon market?
3. What has been the impact of COVID-19 on the global salmon market?
4. What is the breakup of the global salmon market based on the type?
5. What is the breakup of the global salmon market based on the species?
6. What is the breakup of the global salmon market based on the end product type?
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8. What are the key regions in the global wild captured salmon market based on the production?
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