

Global Fish Paste-Based Products Market Growth 2026-2032

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Abstracts

The global Fish Paste-Based Products market size is predicted to grow from US\$ 6266 million in 2025 to US\$ 8908 million in 2032; it is expected to grow at a CAGR of 5.3% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the “Fish Paste-Based Products Industry Forecast” looks at past sales and reviews total world Fish Paste-Based Products sales in 2025, providing a comprehensive analysis by region and market sector of projected Fish Paste-Based Products sales for 2026 through 2032. With Fish Paste-Based Products sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Fish Paste-Based Products industry.

This Insight Report provides a comprehensive analysis of the global Fish Paste-Based Products landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Fish Paste-Based Products portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Fish Paste-Based Products market.

This Insight Report evaluates the key market trends, drivers, and affecting factors

shaping the global outlook for Fish Paste-Based Products and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Fish Paste-Based Products.

This report presents a comprehensive overview, market shares, and growth opportunities of Fish Paste-Based Products market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Frozen

Chilled/Fresh

Segmentation by Cooking Method:

Steamed and Boiled

Fried

Grilled/Roasted

Biomimetic

Segmentation by Raw Material Source:

Marine Fish

Freshwater Fish

Others

Segmentation by Sales Channel:

Online Sales

Offline Sales

Segmentation by Application:

Households

HoReCa

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Fish Paste-Based Products market?

What factors are driving Fish Paste-Based Products market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Fish Paste-Based Products market opportunities vary by end market size?

How does Fish Paste-Based Products break out by Type, by Application?

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