

Global Frozen Surimi Paste Market Growth 2026-2032

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Abstracts

The global Frozen Surimi Paste market size is predicted to grow from US\$ 1880 million in 2025 to US\$ 2632 million in 2032; it is expected to grow at a CAGR of 5.1% from 2026 to 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 cyclical nature. 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.

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

This Insight Report provides a comprehensive analysis of the global Frozen Surimi Paste 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 Frozen Surimi Paste portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Frozen Surimi Paste market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Frozen Surimi Paste 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 Frozen Surimi Paste.

This report presents a comprehensive overview, market shares, and growth opportunities of Frozen Surimi Paste market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Premium

High Grade

Standard

Commercial

Segmentation by Raw Material:

Cold Water Surimi

Tropical Surimi

Others

Segmentation by Processing Method:

Salt-free Surimi

Salted Surimi

Segmentation by Functional Indicators:

High Elasticity Type

High Whiteness Type

High Emulsification Type

Segmentation by Application:

Frozen Surimi Products

Chilled/Fresh Surimi Products

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.

Gadre Marine Export

American Seafoods

UniSea

Maruha Nichiro

Russian Fishery Company

APITOON

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 Addressed in this Report

What is the 10-year outlook for the global Frozen Surimi Paste market?

What factors are driving Frozen Surimi Paste market growth, globally and by region?

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

How do Frozen Surimi Paste market opportunities vary by end market size?

How does Frozen Surimi Paste break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Frozen Surimi Paste Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Frozen Surimi Paste by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Frozen Surimi Paste by Country/Region, 2021, 2025 & 2032

2.2 Frozen Surimi Paste Segment by Type

- 2.2.1 Premium
- 2.2.2 High Grade
- 2.2.3 Standard
- 2.2.4 Commercial
- 2.2.5 Frozen Surimi Paste Sales by Type
 - 2.2.5.1 Global Frozen Surimi Paste Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Frozen Surimi Paste Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Frozen Surimi Paste Sale Price by Type (2021-2026)

2.3 Frozen Surimi Paste Segment by Raw Material

- 2.3.1 Cold Water Surimi
- 2.3.2 Tropical Surimi
- 2.3.3 Others
- 2.3.4 Frozen Surimi Paste Sales by Raw Material
 - 2.3.4.1 Global Frozen Surimi Paste Sales Market Share by Raw Material (2021-2026)
 - 2.3.4.2 Global Frozen Surimi Paste Revenue and Market Share by Raw Material (2021-2026)
 - 2.3.4.3 Global Frozen Surimi Paste Sale Price by Raw Material (2021-2026)

2.4 Frozen Surimi Paste Segment by Processing Method

2.4.1 Salt-free Surimi

2.4.2 Salted Surimi

2.4.3 Frozen Surimi Paste Sales by Processing Method

2.4.3.1 Global Frozen Surimi Paste Sales Market Share by Processing Method (2021-2026)

2.4.3.2 Global Frozen Surimi Paste Revenue and Market Share by Processing Method (2021-2026)

2.4.3.3 Global Frozen Surimi Paste Sale Price by Processing Method (2021-2026)

2.5 Frozen Surimi Paste Segment by Functional Indicators

2.5.1 High Elasticity Type

2.5.2 High Whiteness Type

2.5.3 High Emulsification Type

2.5.4 Frozen Surimi Paste Sales by Functional Indicators

2.5.4.1 Global Frozen Surimi Paste Sales Market Share by Functional Indicators (2021-2026)

2.5.4.2 Global Frozen Surimi Paste Revenue and Market Share by Functional Indicators (2021-2026)

2.5.4.3 Global Frozen Surimi Paste Sale Price by Functional Indicators (2021-2026)

2.6 Frozen Surimi Paste Segment by Application

2.6.1 Frozen Surimi Products

2.6.2 Chilled/Fresh Surimi Products

2.6.3 Frozen Surimi Paste Sales by Application

2.6.3.1 Global Frozen Surimi Paste Sale Market Share by Application (2021-2026)

2.6.3.2 Global Frozen Surimi Paste Revenue and Market Share by Application (2021-2026)

2.6.3.3 Global Frozen Surimi Paste Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Frozen Surimi Paste Breakdown Data by Company

3.1.1 Global Frozen Surimi Paste Annual Sales by Company (2021-2026)

3.1.2 Global Frozen Surimi Paste Sales Market Share by Company (2021-2026)

3.2 Global Frozen Surimi Paste Annual Revenue by Company (2021-2026)

3.2.1 Global Frozen Surimi Paste Revenue by Company (2021-2026)

3.2.2 Global Frozen Surimi Paste Revenue Market Share by Company (2021-2026)

3.3 Global Frozen Surimi Paste Sale Price by Company

3.4 Key Manufacturers Frozen Surimi Paste Producing Area Distribution, Sales Area, Product Type

- 3.4.1 Key Manufacturers Frozen Surimi Paste Product Location Distribution
- 3.4.2 Players Frozen Surimi Paste Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR FROZEN SURIMI PASTE BY GEOGRAPHIC REGION

- 4.1 World Historic Frozen Surimi Paste Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Frozen Surimi Paste Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Frozen Surimi Paste Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Frozen Surimi Paste Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Frozen Surimi Paste Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Frozen Surimi Paste Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Frozen Surimi Paste Sales Growth
- 4.4 APAC Frozen Surimi Paste Sales Growth
- 4.5 Europe Frozen Surimi Paste Sales Growth
- 4.6 Middle East & Africa Frozen Surimi Paste Sales Growth

5 AMERICAS

- 5.1 Americas Frozen Surimi Paste Sales by Country
 - 5.1.1 Americas Frozen Surimi Paste Sales by Country (2021-2026)
 - 5.1.2 Americas Frozen Surimi Paste Revenue by Country (2021-2026)
- 5.2 Americas Frozen Surimi Paste Sales by Type (2021-2026)
- 5.3 Americas Frozen Surimi Paste Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Frozen Surimi Paste Sales by Region
 - 6.1.1 APAC Frozen Surimi Paste Sales by Region (2021-2026)
 - 6.1.2 APAC Frozen Surimi Paste Revenue by Region (2021-2026)

6.2 APAC Frozen Surimi Paste Sales by Type (2021-2026)

6.3 APAC Frozen Surimi Paste Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Frozen Surimi Paste by Country

7.1.1 Europe Frozen Surimi Paste Sales by Country (2021-2026)

7.1.2 Europe Frozen Surimi Paste Revenue by Country (2021-2026)

7.2 Europe Frozen Surimi Paste Sales by Type (2021-2026)

7.3 Europe Frozen Surimi Paste Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Frozen Surimi Paste by Country

8.1.1 Middle East & Africa Frozen Surimi Paste Sales by Country (2021-2026)

8.1.2 Middle East & Africa Frozen Surimi Paste Revenue by Country (2021-2026)

8.2 Middle East & Africa Frozen Surimi Paste Sales by Type (2021-2026)

8.3 Middle East & Africa Frozen Surimi Paste Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Frozen Surimi Paste

10.3 Manufacturing Process Analysis of Frozen Surimi Paste

10.4 Industry Chain Structure of Frozen Surimi Paste

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Frozen Surimi Paste Distributors

11.3 Frozen Surimi Paste Customer

12 WORLD FORECAST REVIEW FOR FROZEN SURIMI PASTE BY GEOGRAPHIC REGION

12.1 Global Frozen Surimi Paste Market Size Forecast by Region

12.1.1 Global Frozen Surimi Paste Forecast by Region (2027-2032)

12.1.2 Global Frozen Surimi Paste Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Frozen Surimi Paste Forecast by Type (2027-2032)

12.7 Global Frozen Surimi Paste Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Gadre Marine Export

13.1.1 Gadre Marine Export Company Information

13.1.2 Gadre Marine Export Frozen Surimi Paste Product Portfolios and Specifications

13.1.3 Gadre Marine Export Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Gadre Marine Export Main Business Overview

- 13.1.5 Gadre Marine Export Latest Developments
- 13.2 American Seafoods
 - 13.2.1 American Seafoods Company Information
 - 13.2.2 American Seafoods Frozen Surimi Paste Product Portfolios and Specifications
 - 13.2.3 American Seafoods Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.2.4 American Seafoods Main Business Overview
 - 13.2.5 American Seafoods Latest Developments
- 13.3 UniSea
 - 13.3.1 UniSea Company Information
 - 13.3.2 UniSea Frozen Surimi Paste Product Portfolios and Specifications
 - 13.3.3 UniSea Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 UniSea Main Business Overview
 - 13.3.5 UniSea Latest Developments
- 13.4 Maruha Nichiro
 - 13.4.1 Maruha Nichiro Company Information
 - 13.4.2 Maruha Nichiro Frozen Surimi Paste Product Portfolios and Specifications
 - 13.4.3 Maruha Nichiro Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Maruha Nichiro Main Business Overview
 - 13.4.5 Maruha Nichiro Latest Developments
- 13.5 Russian Fishery Company
 - 13.5.1 Russian Fishery Company Company Information
 - 13.5.2 Russian Fishery Company Frozen Surimi Paste Product Portfolios and Specifications
 - 13.5.3 Russian Fishery Company Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Russian Fishery Company Main Business Overview
 - 13.5.5 Russian Fishery Company Latest Developments
- 13.6 APITOON
 - 13.6.1 APITOON Company Information
 - 13.6.2 APITOON Frozen Surimi Paste Product Portfolios and Specifications
 - 13.6.3 APITOON Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 APITOON Main Business Overview
 - 13.6.5 APITOON Latest Developments
- 13.7 Vinh Hoan
 - 13.7.1 Vinh Hoan Company Information

- 13.7.2 Vinh Hoan Frozen Surimi Paste Product Portfolios and Specifications
- 13.7.3 Vinh Hoan Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.7.4 Vinh Hoan Main Business Overview
- 13.7.5 Vinh Hoan Latest Developments
- 13.8 Ulka Seafoods
 - 13.8.1 Ulka Seafoods Company Information
 - 13.8.2 Ulka Seafoods Frozen Surimi Paste Product Portfolios and Specifications
 - 13.8.3 Ulka Seafoods Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Ulka Seafoods Main Business Overview
 - 13.8.5 Ulka Seafoods Latest Developments
- 13.9 Trident Seafoods
 - 13.9.1 Trident Seafoods Company Information
 - 13.9.2 Trident Seafoods Frozen Surimi Paste Product Portfolios and Specifications
 - 13.9.3 Trident Seafoods Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Trident Seafoods Main Business Overview
 - 13.9.5 Trident Seafoods Latest Developments
- 13.10 Arctic Storm Management Group
 - 13.10.1 Arctic Storm Management Group Company Information
 - 13.10.2 Arctic Storm Management Group Frozen Surimi Paste Product Portfolios and Specifications
 - 13.10.3 Arctic Storm Management Group Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Arctic Storm Management Group Main Business Overview
 - 13.10.5 Arctic Storm Management Group Latest Developments
- 13.11 QL Foods
 - 13.11.1 QL Foods Company Information
 - 13.11.2 QL Foods Frozen Surimi Paste Product Portfolios and Specifications
 - 13.11.3 QL Foods Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 QL Foods Main Business Overview
 - 13.11.5 QL Foods Latest Developments
- 13.12 Kien Giang Sea Product Corporation
 - 13.12.1 Kien Giang Sea Product Corporation Company Information
 - 13.12.2 Kien Giang Sea Product Corporation Frozen Surimi Paste Product Portfolios and Specifications
 - 13.12.3 Kien Giang Sea Product Corporation Frozen Surimi Paste Sales, Revenue,

Price and Gross Margin (2021-2026)

13.12.4 Kien Giang Sea Product Corporation Main Business Overview

13.12.5 Kien Giang Sea Product Corporation Latest Developments

13.13 Con Dao Seaproducts

13.13.1 Con Dao Seaproducts Company Information

13.13.2 Con Dao Seaproducts Frozen Surimi Paste Product Portfolios and Specifications

13.13.3 Con Dao Seaproducts Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Con Dao Seaproducts Main Business Overview

13.13.5 Con Dao Seaproducts Latest Developments

13.14 Westward Seafoods

13.14.1 Westward Seafoods Company Information

13.14.2 Westward Seafoods Frozen Surimi Paste Product Portfolios and Specifications

13.14.3 Westward Seafoods Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Westward Seafoods Main Business Overview

13.14.5 Westward Seafoods Latest Developments

13.15 Nissui

13.15.1 Nissui Company Information

13.15.2 Nissui Frozen Surimi Paste Product Portfolios and Specifications

13.15.3 Nissui Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Nissui Main Business Overview

13.15.5 Nissui Latest Developments

13.16 Seaprimexco Vietnam

13.16.1 Seaprimexco Vietnam Company Information

13.16.2 Seaprimexco Vietnam Frozen Surimi Paste Product Portfolios and Specifications

13.16.3 Seaprimexco Vietnam Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Seaprimexco Vietnam Main Business Overview

13.16.5 Seaprimexco Vietnam Latest Developments

13.17 Anjoyfood

13.17.1 Anjoyfood Company Information

13.17.2 Anjoyfood Frozen Surimi Paste Product Portfolios and Specifications

13.17.3 Anjoyfood Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.17.4 Anjoyfood Main Business Overview
- 13.17.5 Anjoyfood Latest Developments
- 13.18 Zhejiang Haizhiwei
 - 13.18.1 Zhejiang Haizhiwei Company Information
 - 13.18.2 Zhejiang Haizhiwei Frozen Surimi Paste Product Portfolios and Specifications
 - 13.18.3 Zhejiang Haizhiwei Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.18.4 Zhejiang Haizhiwei Main Business Overview
 - 13.18.5 Zhejiang Haizhiwei Latest Developments
- 13.19 Haixin
 - 13.19.1 Haixin Company Information
 - 13.19.2 Haixin Frozen Surimi Paste Product Portfolios and Specifications
 - 13.19.3 Haixin Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 Haixin Main Business Overview
 - 13.19.5 Haixin Latest Developments
- 13.20 Longsheng
 - 13.20.1 Longsheng Company Information
 - 13.20.2 Longsheng Frozen Surimi Paste Product Portfolios and Specifications
 - 13.20.3 Longsheng Frozen Surimi Paste Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.20.4 Longsheng Main Business Overview
 - 13.20.5 Longsheng Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Frozen Surimi Paste Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Frozen Surimi Paste Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Premium
- Table 4. Major Players of High Grade
- Table 5. Major Players of Standard
- Table 6. Major Players of Commercial
- Table 7. Global Frozen Surimi Paste Sales by Type (2021-2026) & (Kilotons)
- Table 8. Global Frozen Surimi Paste Sales Market Share by Type (2021-2026)
- Table 9. Global Frozen Surimi Paste Revenue by Type (2021-2026) & (\$ million)
- Table 10. Global Frozen Surimi Paste Revenue Market Share by Type (2021-2026)
- Table 11. Global Frozen Surimi Paste Sale Price by Type (2021-2026) & (US\$/Ton)
- Table 12. Major Players of Cold Water Surimi
- Table 13. Major Players of Tropical Surimi
- Table 14. Major Players of Others
- Table 15. Global Frozen Surimi Paste Sales by Raw Material (2021-2026) & (Kilotons)
- Table 16. Global Frozen Surimi Paste Sales Market Share by Raw Material (2021-2026)
- Table 17. Global Frozen Surimi Paste Revenue by Raw Material (2021-2026) & (\$ million)
- Table 18. Global Frozen Surimi Paste Revenue Market Share by Raw Material (2021-2026)
- Table 19. Global Frozen Surimi Paste Sale Price by Raw Material (2021-2026) & (US\$/Ton)
- Table 20. Major Players of Salt-free Surimi
- Table 21. Major Players of Salted Surimi
- Table 22. Global Frozen Surimi Paste Sales by Processing Method (2021-2026) & (Kilotons)
- Table 23. Global Frozen Surimi Paste Sales Market Share by Processing Method (2021-2026)
- Table 24. Global Frozen Surimi Paste Revenue by Processing Method (2021-2026) & (\$ million)
- Table 25. Global Frozen Surimi Paste Revenue Market Share by Processing Method (2021-2026)
- Table 26. Global Frozen Surimi Paste Sale Price by Processing Method (2021-2026) &

(US\$/Ton)

Table 27. Major Players of High Elasticity Type

Table 28. Major Players of High Whiteness Type

Table 29. Major Players of High Emulsification Type

Table 30. Global Frozen Surimi Paste Sales by Functional Indicators (2021-2026) & (Kilotons)

Table 31. Global Frozen Surimi Paste Sales Market Share by Functional Indicators (2021-2026)

Table 32. Global Frozen Surimi Paste Revenue by Functional Indicators (2021-2026) & (\$ million)

Table 33. Global Frozen Surimi Paste Revenue Market Share by Functional Indicators (2021-2026)

Table 34. Global Frozen Surimi Paste Sale Price by Functional Indicators (2021-2026) & (US\$/Ton)

Table 35. Global Frozen Surimi Paste Sale by Application (2021-2026) & (Kilotons)

Table 36. Global Frozen Surimi Paste Sale Market Share by Application (2021-2026)

Table 37. Global Frozen Surimi Paste Revenue by Application (2021-2026) & (\$ million)

Table 38. Global Frozen Surimi Paste Revenue Market Share by Application (2021-2026)

Table 39. Global Frozen Surimi Paste Sale Price by Application (2021-2026) & (US\$/Ton)

Table 40. Global Frozen Surimi Paste Sales by Company (2021-2026) & (Kilotons)

Table 41. Global Frozen Surimi Paste Sales Market Share by Company (2021-2026)

Table 42. Global Frozen Surimi Paste Revenue by Company (2021-2026) & (\$ millions)

Table 43. Global Frozen Surimi Paste Revenue Market Share by Company (2021-2026)

Table 44. Global Frozen Surimi Paste Sale Price by Company (2021-2026) & (US\$/Ton)

Table 45. Key Manufacturers Frozen Surimi Paste Producing Area Distribution and Sales Area

Table 46. Players Frozen Surimi Paste Products Offered

Table 47. Frozen Surimi Paste Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 48. New Products and Potential Entrants

Table 49. Market M&A Activity & Strategy

Table 50. Global Frozen Surimi Paste Sales by Geographic Region (2021-2026) & (Kilotons)

Table 51. Global Frozen Surimi Paste Sales Market Share Geographic Region (2021-2026)

Table 52. Global Frozen Surimi Paste Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 53. Global Frozen Surimi Paste Revenue Market Share by Geographic Region (2021-2026)

Table 54. Global Frozen Surimi Paste Sales by Country/Region (2021-2026) & (Kilotons)

Table 55. Global Frozen Surimi Paste Sales Market Share by Country/Region (2021-2026)

Table 56. Global Frozen Surimi Paste Revenue by Country/Region (2021-2026) & (\$ millions)

Table 57. Global Frozen Surimi Paste Revenue Market Share by Country/Region (2021-2026)

Table 58. Americas Frozen Surimi Paste Sales by Country (2021-2026) & (Kilotons)

Table 59. Americas Frozen Surimi Paste Sales Market Share by Country (2021-2026)

Table 60. Americas Frozen Surimi Paste Revenue by Country (2021-2026) & (\$ millions)

Table 61. Americas Frozen Surimi Paste Sales by Type (2021-2026) & (Kilotons)

Table 62. Americas Frozen Surimi Paste Sales by Application (2021-2026) & (Kilotons)

Table 63. APAC Frozen Surimi Paste Sales by Region (2021-2026) & (Kilotons)

Table 64. APAC Frozen Surimi Paste Sales Market Share by Region (2021-2026)

Table 65. APAC Frozen Surimi Paste Revenue by Region (2021-2026) & (\$ millions)

Table 66. APAC Frozen Surimi Paste Sales by Type (2021-2026) & (Kilotons)

Table 67. APAC Frozen Surimi Paste Sales by Application (2021-2026) & (Kilotons)

Table 68. Europe Frozen Surimi Paste Sales by Country (2021-2026) & (Kilotons)

Table 69. Europe Frozen Surimi Paste Revenue by Country (2021-2026) & (\$ millions)

Table 70. Europe Frozen Surimi Paste Sales by Type (2021-2026) & (Kilotons)

Table 71. Europe Frozen Surimi Paste Sales by Application (2021-2026) & (Kilotons)

Table 72. Middle East & Africa Frozen Surimi Paste Sales by Country (2021-2026) & (Kilotons)

Table 73. Middle East & Africa Frozen Surimi Paste Revenue Market Share by Country (2021-2026)

Table 74. Middle East & Africa Frozen Surimi Paste Sales by Type (2021-2026) & (Kilotons)

Table 75. Middle East & Africa Frozen Surimi Paste Sales by Application (2021-2026) & (Kilotons)

Table 76. Key Market Drivers & Growth Opportunities of Frozen Surimi Paste

Table 77. Key Market Challenges & Risks of Frozen Surimi Paste

Table 78. Key Industry Trends of Frozen Surimi Paste

Table 79. Frozen Surimi Paste Raw Material

Table 80. Key Suppliers of Raw Materials

Table 81. Frozen Surimi Paste Distributors List

Table 82. Frozen Surimi Paste Customer List

Table 83. Global Frozen Surimi Paste Sales Forecast by Region (2027-2032) & (Kilotons)

Table 84. Global Frozen Surimi Paste Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 85. Americas Frozen Surimi Paste Sales Forecast by Country (2027-2032) & (Kilotons)

Table 86. Americas Frozen Surimi Paste Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 87. APAC Frozen Surimi Paste Sales Forecast by Region (2027-2032) & (Kilotons)

Table 88. APAC Frozen Surimi Paste Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 89. Europe Frozen Surimi Paste Sales Forecast by Country (2027-2032) & (Kilotons)

Table 90. Europe Frozen Surimi Paste Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 91. Middle East & Africa Frozen Surimi Paste Sales Forecast by Country (2027-2032) & (Kilotons)

Table 92. Middle East & Africa Frozen Surimi Paste Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 93. Global Frozen Surimi Paste Sales Forecast by Type (2027-2032) & (Kilotons)

Table 94. Global Frozen Surimi Paste Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 95. Global Frozen Surimi Paste Sales Forecast by Application (2027-2032) & (Kilotons)

Table 96. Global Frozen Surimi Paste Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 97. Gadre Marine Export Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 98. Gadre Marine Export Frozen Surimi Paste Product Portfolios and Specifications

Table 99. Gadre Marine Export Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 100. Gadre Marine Export Main Business

Table 101. Gadre Marine Export Latest Developments

Table 102. American Seafoods Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 103. American Seafoods Frozen Surimi Paste Product Portfolios and

Specifications

Table 104. American Seafoods Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 105. American Seafoods Main Business

Table 106. American Seafoods Latest Developments

Table 107. UniSea Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 108. UniSea Frozen Surimi Paste Product Portfolios and Specifications

Table 109. UniSea Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 110. UniSea Main Business

Table 111. UniSea Latest Developments

Table 112. Maruha Nichiro Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 113. Maruha Nichiro Frozen Surimi Paste Product Portfolios and Specifications

Table 114. Maruha Nichiro Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 115. Maruha Nichiro Main Business

Table 116. Maruha Nichiro Latest Developments

Table 117. Russian Fishery Company Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 118. Russian Fishery Company Frozen Surimi Paste Product Portfolios and Specifications

Table 119. Russian Fishery Company Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 120. Russian Fishery Company Main Business

Table 121. Russian Fishery Company Latest Developments

Table 122. APITOON Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 123. APITOON Frozen Surimi Paste Product Portfolios and Specifications

Table 124. APITOON Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 125. APITOON Main Business

Table 126. APITOON Latest Developments

Table 127. Vinh Hoan Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 128. Vinh Hoan Frozen Surimi Paste Product Portfolios and Specifications

Table 129. Vinh Hoan Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 130. Vinh Hoan Main Business

Table 131. Vinh Hoan Latest Developments

Table 132. Ulka Seafoods Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 133. Ulka Seafoods Frozen Surimi Paste Product Portfolios and Specifications

Table 134. Ulka Seafoods Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 135. Ulka Seafoods Main Business

Table 136. Ulka Seafoods Latest Developments

Table 137. Trident Seafoods Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 138. Trident Seafoods Frozen Surimi Paste Product Portfolios and Specifications

Table 139. Trident Seafoods Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 140. Trident Seafoods Main Business

Table 141. Trident Seafoods Latest Developments

Table 142. Arctic Storm Management Group Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 143. Arctic Storm Management Group Frozen Surimi Paste Product Portfolios and Specifications

Table 144. Arctic Storm Management Group Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 145. Arctic Storm Management Group Main Business

Table 146. Arctic Storm Management Group Latest Developments

Table 147. QL Foods Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 148. QL Foods Frozen Surimi Paste Product Portfolios and Specifications

Table 149. QL Foods Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 150. QL Foods Main Business

Table 151. QL Foods Latest Developments

Table 152. Kien Giang Sea Product Corporation Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 153. Kien Giang Sea Product Corporation Frozen Surimi Paste Product Portfolios and Specifications

Table 154. Kien Giang Sea Product Corporation Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 155. Kien Giang Sea Product Corporation Main Business

Table 156. Kien Giang Sea Product Corporation Latest Developments

Table 157. Con Dao Seaproducts Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 158. Con Dao Seaproducts Frozen Surimi Paste Product Portfolios and Specifications

Table 159. Con Dao Seaproducts Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 160. Con Dao Seaproducts Main Business

Table 161. Con Dao Seaproducts Latest Developments

Table 162. Westward Seafoods Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 163. Westward Seafoods Frozen Surimi Paste Product Portfolios and Specifications

Table 164. Westward Seafoods Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 165. Westward Seafoods Main Business

Table 166. Westward Seafoods Latest Developments

Table 167. Nissui Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 168. Nissui Frozen Surimi Paste Product Portfolios and Specifications

Table 169. Nissui Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 170. Nissui Main Business

Table 171. Nissui Latest Developments

Table 172. Seaprimexco Vietnam Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 173. Seaprimexco Vietnam Frozen Surimi Paste Product Portfolios and Specifications

Table 174. Seaprimexco Vietnam Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 175. Seaprimexco Vietnam Main Business

Table 176. Seaprimexco Vietnam Latest Developments

Table 177. Anjoyfood Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 178. Anjoyfood Frozen Surimi Paste Product Portfolios and Specifications

Table 179. Anjoyfood Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 180. Anjoyfood Main Business

Table 181. Anjoyfood Latest Developments

Table 182. Zhejiang Haizhiwei Basic Information, Frozen Surimi Paste Manufacturing

Base, Sales Area and Its Competitors

Table 183. Zhejiang Haizhiwei Frozen Surimi Paste Product Portfolios and Specifications

Table 184. Zhejiang Haizhiwei Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 185. Zhejiang Haizhiwei Main Business

Table 186. Zhejiang Haizhiwei Latest Developments

Table 187. Haixin Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 188. Haixin Frozen Surimi Paste Product Portfolios and Specifications

Table 189. Haixin Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 190. Haixin Main Business

Table 191. Haixin Latest Developments

Table 192. Longsheng Basic Information, Frozen Surimi Paste Manufacturing Base, Sales Area and Its Competitors

Table 193. Longsheng Frozen Surimi Paste Product Portfolios and Specifications

Table 194. Longsheng Frozen Surimi Paste Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 195. Longsheng Main Business

Table 196. Longsheng Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Frozen Surimi Paste
- Figure 2. Frozen Surimi Paste Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Frozen Surimi Paste Sales Growth Rate 2021-2032 (Kilotons)
- Figure 7. Global Frozen Surimi Paste Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Frozen Surimi Paste Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Frozen Surimi Paste Sales Market Share by Country/Region (2025)
- Figure 10. Frozen Surimi Paste Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Premium
- Figure 12. Product Picture of High Grade
- Figure 13. Product Picture of Standard
- Figure 14. Product Picture of Commercial
- Figure 15. Global Frozen Surimi Paste Sales Market Share by Type in 2026
- Figure 16. Global Frozen Surimi Paste Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Cold Water Surimi
- Figure 18. Product Picture of Tropical Surimi
- Figure 19. Product Picture of Others
- Figure 20. Global Frozen Surimi Paste Sales Market Share by Raw Material in 2026
- Figure 21. Global Frozen Surimi Paste Revenue Market Share by Raw Material (2021-2026)
- Figure 22. Product Picture of Salt-free Surimi
- Figure 23. Product Picture of Salted Surimi
- Figure 24. Global Frozen Surimi Paste Sales Market Share by Processing Method in 2026
- Figure 25. Global Frozen Surimi Paste Revenue Market Share by Processing Method (2021-2026)
- Figure 26. Product Picture of High Elasticity Type
- Figure 27. Product Picture of High Whiteness Type
- Figure 28. Product Picture of High Emulsification Type
- Figure 29. Global Frozen Surimi Paste Sales Market Share by Functional Indicators in 2026

- Figure 30. Global Frozen Surimi Paste Revenue Market Share by Functional Indicators (2021-2026)
- Figure 31. Frozen Surimi Paste Consumed in Frozen Surimi Products
- Figure 32. Global Frozen Surimi Paste Market: Frozen Surimi Products (2021-2026) & (Kilotons)
- Figure 33. Frozen Surimi Paste Consumed in Chilled/Fresh Surimi Products
- Figure 34. Global Frozen Surimi Paste Market: Chilled/Fresh Surimi Products (2021-2026) & (Kilotons)
- Figure 35. Global Frozen Surimi Paste Sale Market Share by Application (2025)
- Figure 36. Global Frozen Surimi Paste Revenue Market Share by Application in 2026
- Figure 37. Frozen Surimi Paste Sales by Company in 2026 (Kilotons)
- Figure 38. Global Frozen Surimi Paste Sales Market Share by Company in 2026
- Figure 39. Frozen Surimi Paste Revenue by Company in 2026 (\$ millions)
- Figure 40. Global Frozen Surimi Paste Revenue Market Share by Company in 2026
- Figure 41. Global Frozen Surimi Paste Sales Market Share by Geographic Region (2021-2026)
- Figure 42. Global Frozen Surimi Paste Revenue Market Share by Geographic Region in 2026
- Figure 43. Americas Frozen Surimi Paste Sales 2021-2026 (Kilotons)
- Figure 44. Americas Frozen Surimi Paste Revenue 2021-2026 (\$ millions)
- Figure 45. APAC Frozen Surimi Paste Sales 2021-2026 (Kilotons)
- Figure 46. APAC Frozen Surimi Paste Revenue 2021-2026 (\$ millions)
- Figure 47. Europe Frozen Surimi Paste Sales 2021-2026 (Kilotons)
- Figure 48. Europe Frozen Surimi Paste Revenue 2021-2026 (\$ millions)
- Figure 49. Middle East & Africa Frozen Surimi Paste Sales 2021-2026 (Kilotons)
- Figure 50. Middle East & Africa Frozen Surimi Paste Revenue 2021-2026 (\$ millions)
- Figure 51. Americas Frozen Surimi Paste Sales Market Share by Country in 2026
- Figure 52. Americas Frozen Surimi Paste Revenue Market Share by Country (2021-2026)
- Figure 53. Americas Frozen Surimi Paste Sales Market Share by Type (2021-2026)
- Figure 54. Americas Frozen Surimi Paste Sales Market Share by Application (2021-2026)
- Figure 55. United States Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 56. Canada Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 57. Mexico Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 58. Brazil Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 59. APAC Frozen Surimi Paste Sales Market Share by Region in 2026
- Figure 60. APAC Frozen Surimi Paste Revenue Market Share by Region (2021-2026)
- Figure 61. APAC Frozen Surimi Paste Sales Market Share by Type (2021-2026)

- Figure 62. APAC Frozen Surimi Paste Sales Market Share by Application (2021-2026)
- Figure 63. China Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 64. Japan Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 65. South Korea Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 66. Southeast Asia Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 67. India Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 68. Australia Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 69. China Taiwan Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 70. Europe Frozen Surimi Paste Sales Market Share by Country in 2026
- Figure 71. Europe Frozen Surimi Paste Revenue Market Share by Country (2021-2026)
- Figure 72. Europe Frozen Surimi Paste Sales Market Share by Type (2021-2026)
- Figure 73. Europe Frozen Surimi Paste Sales Market Share by Application (2021-2026)
- Figure 74. Germany Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 75. France Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 76. UK Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 77. Italy Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 78. Russia Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 79. Middle East & Africa Frozen Surimi Paste Sales Market Share by Country (2021-2026)
- Figure 80. Middle East & Africa Frozen Surimi Paste Sales Market Share by Type (2021-2026)
- Figure 81. Middle East & Africa Frozen Surimi Paste Sales Market Share by Application (2021-2026)
- Figure 82. Egypt Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 83. South Africa Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 84. Israel Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 85. Turkey Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 86. GCC Countries Frozen Surimi Paste Revenue Growth 2021-2026 (\$ millions)
- Figure 87. Manufacturing Cost Structure Analysis of Frozen Surimi Paste in 2026
- Figure 88. Manufacturing Process Analysis of Frozen Surimi Paste
- Figure 89. Industry Chain Structure of Frozen Surimi Paste
- Figure 90. Channels of Distribution
- Figure 91. Global Frozen Surimi Paste Sales Market Forecast by Region (2027-2032)
- Figure 92. Global Frozen Surimi Paste Revenue Market Share Forecast by Region (2027-2032)
- Figure 93. Global Frozen Surimi Paste Sales Market Share Forecast by Type (2027-2032)
- Figure 94. Global Frozen Surimi Paste Revenue Market Share Forecast by Type (2027-2032)

Figure 95. Global Frozen Surimi Paste Sales Market Share Forecast by Application
(2027-2032)

Figure 96. Global Frozen Surimi Paste Revenue Market Share Forecast by Application
(2027-2032)

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