

# **Fishery By-products Market by Type (Protein & Protein Derivative, Fish Oil, Bioactives & Specialty Compound), Source (Marine, Aquaculture), End-user Industry (Food & Beverage, Animal Feed, Agriculture), Technology, & Region - Global Forecast to 2030**

<https://marketpublishers.com/r/F4B4B67312BAEN.html>

Date: August 2025

Pages: 369

Price: US\$ 4,950.00 (Single User License)

ID: F4B4B67312BAEN

## **Abstracts**

The global market for fishery by-products is estimated to be USD 26.34 billion in 2025 and is projected to reach USD 37.46 billion by 2030, at a CAGR of 7.3% during the forecast period. Globally, it is estimated that 30–70% of fish biomass is discarded as waste during processing, depending on the species and method used. For example, fish heads, skins, scales, bones, viscera, and shells from crustaceans like shrimp and crabs often go unused. This presents a significant waste management challenge in both developed and developing countries. However, these by-products are rich in valuable nutrients and compounds such as omega-3 fatty acids, collagen, gelatin, enzymes, chitin, chitosan, and hydroxyapatite. Utilizing these components not only creates economic value but also helps reduce the environmental impact of waste disposal—particularly marine dumping, incineration, or landfilling.

“The food & beverage segment is projected to register a significant CAGR during the forecast period.”

The food and beverage industry is a growing and increasingly vital market for fishery by-products. Main applications include the use of marine collagen, gelatin, and chondroitin, which are extracted from the skin, bones, and cartilage of fish and other marine animals. Marine collagen has become popular in functional foods and nutraceutical drinks, especially among health-conscious and aging populations. Collagen peptides are increasingly added to ready-to-drink beverages, protein bars, and health supplements because of their perceived benefits for skin health, joint support, and bone

strength. Marine-sourced collagen is particularly preferred in Asia and North America due to religious and dietary restrictions related to bovine or porcine sources. Gelatin made from fish skin and bones is also used in gummies, desserts, and confections. Its lower melting point compared to mammalian gelatin makes it suitable for specific uses such as encapsulating probiotics and flavors. Fishery by-product-based calcium, like hydroxyapatite or calcium phosphate, is being added more frequently to fortified food products, targeting calcium-deficient groups, especially women and the elderly.

“Fishmeal is projected to hold a significant market share in the type segment during the forecast period.”

Fishmeal provides a balanced supply of all essential amino acids, minerals, phospholipids, and fatty acids (such as docosahexaenoic acid or DHA and eicosapentaenoic acid or EPA) for optimal development, growth, and reproduction, especially in larvae and broodstock. The nutrients in fishmeal also support disease resistance by enhancing and maintaining a healthy, functional immune system. Adding fishmeal and fish oil to aquaculture diets ensures that the fish intended for human consumption are a source of essential fatty acids, like EPA and DHA, vital for human health functions. Including fishmeal in the diets of aquatic animals helps reduce pollution by improving nutrient digestibility. Using high-quality fishmeal in feed gives the final product a 'natural or wholesome' quality, similar to that of wild fish. Protein needs are higher in aquaculture diets because most aquatic animals poorly utilize carbohydrates.

The fishmeal and fish oil market in the Asia Pacific region offers numerous business opportunities for manufacturers. Asia Pacific is the largest consumer of fish oil worldwide. Consumption is especially high in China, Japan, and India. In Japan, fish oil products are widely used in pharmaceuticals and nutraceuticals due to their rich omega-3 content and their beneficial effects on the heart, skin, and cognitive health. Fishmeal also represents a significant business opportunity for the Asia Pacific livestock industry, thanks to the increasing awareness of livestock and pet health.

Asia Pacific is expected to account for a significant market share.

The Asia Pacific (APAC) region holds a leading position in the global fishery by-products market due to its extensive coastline, marine resources, and seafood processing. Countries in the region, such as China, India, Indonesia, Vietnam, Thailand, Japan, South Korea, and the Philippines, are among the largest global producers and

exporters of fish and seafood. As a result, they generate large quantities of by-products—such as fish heads, bones, skins, viscera, scales, and shell waste—and are seeking to valorize these by-products for commercial opportunities. The market is now rapidly evolving, driven by a combination of increasing demand for sustainable ingredients, growth in aquaculture, government initiatives, and a commitment to the circular economy.

The main end-use sector for fishery by-products in the region is animal feed, especially aquafeed, which has developed primarily due to the rapid growth of the aquaculture industry. Fishmeal and fish oils (which can be produced from both whole fish and by-products) are the main ingredients used to feed farmed species like tilapia, pangasius, carp, and shrimp. Additionally, hydrolyzed forms of fish proteins are becoming more popular in pet food and specialty livestock feed because these proteins are easily digestible and contain specific amino acids. In the food and nutraceutical sectors, Japan, South Korea, and China are well-established markets for marine collagen, peptides, and fish oil supplements. Growth in these markets has been driven by aging populations, a cultural familiarity with functional foods, and consumer awareness of natural and marine-based health products.

In-depth interviews have been conducted with chief executive officers (CEOs), directors, and other executives from various key organizations operating in the fishery by-products market:

By Company Type: Tier 1 – 25%, Tier 2 – 45%, and Tier 3 – 30%

By Designation: CXOs – 20%, Managers – 50%, Executives- 30%

By Region: North America – 25%, Europe – 30%, Asia Pacific – 20%, South America – 15%, and Rest of the World –10%

Prominent companies in the market include FKS Multi Agro (Indonesia), Pesquera Diamante Peru (Peru), Oceana Group Limited (South Africa), Scoular Company (US), Austevoll Seafood ASA (Norway), Maruha Nichiro Corporation (Japan), Nippon Suisan Kais (Japan), Sopropeche (France), Thai Union Ingredients (Thailand), Seagarden Group (Norway), Lysi hf. (Iceland), Hofseth Biocare AS (Norway), Ashland (US), Atlantis Sea-Agri Group (Africa), and Dai Dai Thanh Seafoods (Vietnam).

Other players include Pattani Fish Meal Co., Ltd. (Thailand), GC Reiber Oil (Norway),

Croda International PLC (UK), Omega Protein Corporation (US), Sursan A.S. (Turkey), Fritz Koster Handelsgesellschaft AG (Germany), Maxland Group (Czech Republic), and Gold Fin International (Oman).

### **Research Coverage:**

This research report categorizes the fishery by-products market by Type (Proteins & Protein Derivatives, Fish Oil, Minerals, Bioactives & Specialty Compounds) End-user Industry (Food & Beverage, Animal Feed, Agriculture, Cosmetics & Personal Care, Pharmaceutical & Nutraceuticals, Industrial Applications), Source (Marine, Aquaculture), Technology (Enzymatic Hydrolysis, Chemical Extraction (Acid/Base), Fermentation, Freeze Drying, Supercritical Fluid Extraction), and Region (North America, Europe, Asia Pacific, South America, and Rest of the World). The scope of the report covers detailed information regarding the major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the market. A detailed analysis of the key industry players has been done to provide insights into their business overview, services, key strategies, contracts, partnerships, agreements, new service launches, mergers and acquisitions, and recent developments associated with the fishery by-products market. This report covers a competitive analysis of upcoming startups in the fishery by-products market ecosystem. Furthermore, industry-specific trends such as technology analysis, ecosystem and market mapping, patent analysis, and regulatory landscape, among others, are also covered in the study.

### **Reasons to buy this report:**

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall fishery by-products and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

### **The report provides insights on the following pointers:**

Analysis of key drivers (advancements in waste utilization and biorefinery technologies), restraints (lack of standardized collection and processing infrastructure), opportunities (government incentives and blue economy initiatives), and challenges (seasonal and regional variability in raw material

supply) influencing the growth of the fishery by-products market.

**New Product Launch/Innovation:** Detailed insights on research & development activities and new product launches in the fishery by-products market.

**Market Development:** Comprehensive information about lucrative markets – the report analyzes the fishery by-products across varied regions.

**Market Diversification:** Exhaustive information about new services, untapped geographies, recent developments, and investments in the fishery by-products market.

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, product offerings, brand/product comparison, and product food prints of leading players such as FKS Multi Agro (Indonesia), Pesquera Diamante Peru (Peru), Oceana Group Limited (South Africa), Scoular Company (US), Austevoll Seafood A (Norway), Maruha Nichiro Cor (Japan), Nippon Suisan Kais (Japan), Sopropeche (France), Thai Union Ingredient (Thailand), and other players in the fishery by-products market.

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