

Frozen Seafood Market Outlook 2025-2034: Market Share, and Growth Analysis By Category (Fish, Crustaceans, Shellfish, Mollusca, Other Types), By Nature (Organic, Conventional), By Distribution Channel, By End User

<https://marketpublishers.com/r/FBF6B0A6A5BCEN.html>

Date: October 2025

Pages: 160

Price: US\$ 3,950.00 (Single User License)

ID: FBF6B0A6A5BCEN

Abstracts

The Frozen Seafood Market is valued at USD 21.3 billion in 2025 and is projected to grow at a CAGR of 6.7% to reach USD 38.2 billion by 2034.

Frozen Seafood Market Overview

The Frozen Seafood Market has been growing steadily due to its ability to offer convenience, longer shelf life, and access to a variety of marine products throughout the year. Consumers are increasingly turning to frozen seafood for its freshness, nutritional value, and ability to be stored and used at a later date. The demand for frozen seafood is driven by the rising popularity of seafood as a healthy source of protein, as well as its wide usage in retail, foodservice, and industrial food applications. The market has also benefited from a greater awareness of the environmental impact of overfishing, leading to a preference for sustainably sourced seafood. Frozen seafood includes a wide range of products, from fish fillets and shellfish to ready-to-eat meals, catering to diverse consumer needs. The expansion of global distribution networks and advancements in freezing technologies, such as cryogenic and IQF (individually quick frozen) methods, have further contributed to market growth. With the growing trend of convenience foods and increasing demand for premium, sustainably sourced seafood, the frozen seafood market is expected to continue expanding across global regions. The Frozen Seafood Market has seen notable developments, particularly in terms of sustainability, technology, and distribution. One key development has been the increase in demand for responsibly sourced frozen seafood, driven by consumer concerns over sustainability

and ethical practices. Companies are increasingly adopting certifications such as MSC (Marine Stewardship Council) to meet these consumer preferences and strengthen their position in the market. Technological advancements in freezing processes, such as improved vacuum sealing and cold storage solutions, have enhanced product quality and extended shelf life. Moreover, advancements in packaging, such as the use of biodegradable and recyclable materials, are helping address concerns over plastic waste. On the distribution side, the expansion of online grocery platforms has played a pivotal role in reaching consumers directly and offering fresh frozen products with convenient home delivery options. While demand for frozen seafood has surged, challenges such as supply chain disruptions and increasing energy costs for freezing and storage are putting pressure on profit margins, leading companies to explore alternative solutions for cost reduction and operational efficiency. The Frozen Seafood Market is poised for continued expansion, driven by rising consumer awareness of health benefits, growing demand for convenience foods, and technological advancements. Innovations in packaging are expected to lead to more sustainable and eco-friendly solutions, as consumers increasingly seek products with minimal environmental impact. Furthermore, the rise of plant-based and alternative protein sources in the food industry may open new market opportunities for hybrid products, combining seafood with plant-based ingredients. The demand for frozen seafood in emerging markets, particularly in Asia-Pacific, is expected to increase as these regions experience economic growth, urbanization, and changing dietary patterns. Additionally, the growing popularity of seafood-based ready-to-eat meals and snacks will continue to fuel market growth, especially in the convenience food sector. With increasing investments in automation and digitization across the seafood supply chain, the market is expected to benefit from improved efficiency, better traceability, and enhanced transparency, particularly in sourcing and quality control processes.

Key Insights Frozen Seafood Market

Sustainability and Ethical Sourcing: Growing consumer demand for sustainably sourced, ethically caught seafood has led companies to adopt certifications like MSC and ASC, ensuring responsible practices in seafood production.

Advancements in Freezing Technology: Innovations such as individually quick freezing (IQF) and cryogenic freezing methods have improved the quality and shelf life of frozen seafood, making it more appealing to consumers.

Plant-Based and Hybrid Products: The introduction of hybrid seafood products combining traditional fish with plant-based ingredients is gaining traction as part

of the broader trend toward plant-based diets.

Online and Direct-to-Consumer Sales: The rise of e-commerce platforms and subscription services has expanded access to frozen seafood, providing consumers with the convenience of home delivery and a wider selection of products.

Innovative and Sustainable Packaging: The shift towards eco-friendly and recyclable packaging materials in response to consumer concerns about plastic waste is shaping the future of the frozen seafood market.

Rising Health Consciousness: Increasing awareness of the health benefits of seafood, particularly its rich omega-3 content, is driving demand for frozen fish and seafood products as a healthy protein source.

Growing Popularity of Convenience Foods: The demand for ready-to-eat and easy-to-prepare meals, including frozen seafood options, is increasing as consumers seek convenience without compromising on nutrition.

Sustainability Concerns and Eco-Friendly Choices: Consumer preference for sustainably sourced products is driving seafood suppliers to focus on responsible sourcing and eco-friendly production methods.

Global Distribution Networks Expansion: As supply chains improve, frozen seafood products are increasingly accessible to global markets, particularly emerging regions with rising incomes and urbanization.

Supply Chain Disruptions and Rising Costs: Fluctuations in raw material availability, shipping delays, and rising energy costs for freezing and storage are challenges that can increase operational costs and affect market pricing.

Frozen Seafood Market Segmentation

By Category

Fish

Crustaceans

Shellfish

Mollusca

Other Types

By Nature

Organic

Conventional

By Distribution Channel

Business-to-business (B2B)

Business-to-consumer (B2C)

By End User

Food Processing Industry

Food Service Provider

Retail And Household

Key Companies Analysed

Toyo Suisan Kaisha Ltd.

Maruha Nichiro Corporation

Mowi ASA

Nippon Suisan Kaisha Ltd.

Thai Union Group Public Company Limited

Nomad Foods Limited

Findus Group Limited

Lerøy Seafood Group ASA

AquaChile S.A.

Empresas AquaChile S.A.

Royal Greenland A/S

High Liner Foods Inc.

Ocean Beauty Seafoods LLC

Tassal Group Limited

Pacific Seafood

Clearwater Seafoods Incorporated

Trident Seafoods Corporation

Bumble Bee Foods LLC

Surapon Foods Public Company Limited

Apex Frozen Foods Limited

Beaver Street Fisheries Inc.

Mazetta Company LLC

Cooke Aquaculture Inc.

Alliance Select Foods International Inc.

Siam Canadian Group Limited

J. Sykes & Sons

Castlerock Inc.

Tri Marine International Inc.

Friosur S.A.

Europ?che

Frozen Seafood Market Analytics

The report employs rigorous tools, including Porter's Five Forces, value chain mapping, and scenario-based modeling, to assess supply–demand dynamics. Cross-sector influences from parent, derived, and substitute markets are evaluated to identify risks and opportunities. Trade and pricing analytics provide an up-to-date view of international flows, including leading exporters, importers, and regional price trends.

Macroeconomic indicators, policy frameworks such as carbon pricing and energy security strategies, and evolving consumer behavior are considered in forecasting scenarios. Recent deal flows, partnerships, and technology innovations are incorporated to assess their impact on future market performance.

Frozen Seafood Market Competitive Intelligence

The competitive landscape is mapped through OG Analysis' proprietary frameworks, profiling leading companies with details on business models, product portfolios, financial performance, and strategic initiatives. Key developments such as mergers & acquisitions, technology collaborations, investment inflows, and regional expansions are analyzed for their competitive impact. The report also identifies emerging players and innovative startups contributing to market disruption.

Regional insights highlight the most promising investment destinations, regulatory

landscapes, and evolving partnerships across energy and industrial corridors.

Countries Covered

North America — Frozen Seafood market data and outlook to 2034

United States

Canada

Mexico

Europe — Frozen Seafood market data and outlook to 2034

Germany

United Kingdom

France

Italy

Spain

BeNeLux

Russia

Sweden

Asia-Pacific — Frozen Seafood market data and outlook to 2034

China

Japan

India

South Korea

Australia

Indonesia

Malaysia

Vietnam

Middle East and Africa — Frozen Seafood market data and outlook to 2034

Saudi Arabia

South Africa

Iran

UAE

Egypt

South and Central America — Frozen Seafood market data and outlook to 2034

Brazil

Argentina

Chile

Peru

** We can include data and analysis of additional countries on demand.*

Research Methodology

This study combines primary inputs from industry experts across the Frozen Seafood value chain with secondary data from associations, government publications, trade databases, and company disclosures. Proprietary modeling techniques, including data

triangulation, statistical correlation, and scenario planning, are applied to deliver reliable market sizing and forecasting.

Key Questions Addressed

What is the current and forecast market size of the Frozen Seafood industry at global, regional, and country levels?

Which types, applications, and technologies present the highest growth potential?

How are supply chains adapting to geopolitical and economic shocks?

What role do policy frameworks, trade flows, and sustainability targets play in shaping demand?

Who are the leading players, and how are their strategies evolving in the face of global uncertainty?

Which regional “hotspots” and customer segments will outpace the market, and what go-to-market and partnership models best support entry and expansion?

Where are the most investable opportunities—across technology roadmaps, sustainability-linked innovation, and M&A—and what is the best segment to invest over the next 3–5 years?

Your Key Takeaways from the Frozen Seafood Market Report

Global Frozen Seafood market size and growth projections (CAGR), 2024-2034

Impact of Russia-Ukraine, Israel-Palestine, and Hamas conflicts on Frozen Seafood trade, costs, and supply chains

Frozen Seafood market size, share, and outlook across 5 regions and 27 countries, 2023-2034

Frozen Seafood market size, CAGR, and market share of key products, applications, and end-user verticals, 2023-2034

Short- and long-term Frozen Seafood market trends, drivers, restraints, and opportunities

Porter's Five Forces analysis, technological developments, and Frozen Seafood supply chain analysis

Frozen Seafood trade analysis, Frozen Seafood market price analysis, and Frozen Seafood supply/demand dynamics

Profiles of 5 leading companies—overview, key strategies, financials, and products

Latest Frozen Seafood market news and developments

Additional Support

With the purchase of this report, you will receive

An updated PDF report and an MS Excel data workbook containing all market tables and figures for easy analysis.

7-day post-sale analyst support for clarifications and in-scope supplementary data, ensuring the deliverable aligns precisely with your requirements.

Complimentary report update to incorporate the latest available data and the impact of recent market developments.

** The updated report will be delivered within 3 working days*

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