

Fish Gelatine Market Forecasts to 2030 – Global Analysis By Type (Type A (from cold-water fish) and Type B (from warm-water fish)), Source, Nature, Form, Application and By Geography

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Abstracts

According to Statistics MRC, the Global Fish Gelatine Market is accounted for \$202.475 million in 2024 and is expected to reach \$309.008 million by 2030 growing at a CAGR of 7.3% during the forecast period. Fish gelatine is a natural protein derived from the collagen found in fish skin, bones, and fins. It is commonly used as a gelling agent in food products, such as candies, marshmallows, and jellies, as well as in cosmetics, pharmaceuticals, and photography. Fish gelatine is a popular alternative to bovine or porcine gelatine, particularly in kosher and halal food products. It is rich in amino acids, primarily glycine and proline, which contribute to its gelling properties. Fish gelatine is also considered easier to digest compared to other animal-based gelatines, making it a preferred option for many consumers.

According to the Food and Agriculture Organization (FAO) of the United Nations, global fish production reached 179 million tonnes in 2018, with aquaculture accounting for 46% of the total.

Market Dynamics:

Driver:

Growing demand for natural products

Consumers become more health-conscious; they prefer natural and sustainable alternatives over synthetic options. Fish gelatine, derived from fish collagen, is

considered a safer and more eco-friendly ingredient compared to bovine or porcine gelatine. Its use in food, pharmaceuticals, and cosmetics is increasing due to its health benefits and versatility. The rising trend towards clean-label products further boosts the market, as fish gelatine meets the demand for transparency and natural ingredients. Additionally, the shift towards plant-based and halal diets is increasing its popularity among various consumer groups.

Restraint:

High cost compared to animal gelatine

Animal gelatine, derived from bovine or porcine sources, is often less expensive due to its widespread availability and established production processes. Fish gelatin, on the other hand, is generally more costly due to factors like limited raw material sources and higher production costs. This price disparity makes fish gelatine less attractive to cost-conscious industries, particularly in food and pharmaceuticals. Additionally, fish gelatine's production requires specialized sourcing and extraction techniques, which further increase its cost. As a result, manufacturers may opt for animal gelatine as a more affordable alternative. The cost barrier thus limits the widespread adoption and market penetration of fish gelatine.

Opportunity:

Innovation in product development

Advancements in production techniques, such as better extraction methods, ensure higher quality and efficiency. The rise in demand for health-conscious and natural food ingredients has increased the use of fish gelatine in functional foods and dietary supplements. Additionally, innovations in packaging and product formulations have made fish gelatine more versatile in cosmetics and pharmaceuticals. The growing popularity of sustainable and plant-based alternatives has also spurred the need for more eco-friendly fish gelatine options. As these innovations align with consumer preferences and regulatory standards, the market continues to expand rapidly.

Threat:

Fluctuating fish stock availability

Fluctuating fish stock availability, the producers struggle to source raw materials

consistently. This leads to a rise in fish gelatine prices, making it less affordable for manufacturers and consumers. Unstable fish availability also causes delays in production, affecting the market's overall efficiency. Additionally, overfishing concerns and regulatory restrictions can further limit the catch of fish. As a result, the fish gelatine market faces increased competition from alternative gelatines. This instability may deter investment and hamper long-term market growth.

Covid-19 Impact

The COVID-19 pandemic had a significant impact on the fish gelatine market, causing disruptions in supply chains and production. Lockdowns, travel restrictions, and labor shortages led to a decline in manufacturing and availability of raw materials. Additionally, the closure of foodservice establishments and reduced consumer spending affected the demand for fish gelatine in food and beverage applications. However, the market witnessed a rebound in 2021 with the resumption of activities, growing demand for collagen-based products, and increasing awareness of health benefits. Despite challenges, the fish gelatine market is expected to grow as the economy recovers and demand rises in pharmaceuticals and cosmetics.

The organic segment is expected to be the largest during the forecast period

The organic segment is expected to account for the largest market share during the forecast period, due to increasing consumer demand for natural and chemical-free products. Organic fish gelatine, made from fish rose without synthetic chemicals or antibiotics, appeals to health-conscious consumers seeking clean-label options. As awareness of environmental and health concerns rises, organic fish gelatine offers a sustainable alternative to traditional gelatine sources. Organic certifications also assure consumers of the product's authenticity and adherence to high-quality standards. The demand for plant-based and organic ingredients in food and pharmaceuticals further boosts this market segment.

The pharmaceuticals segment is expected to have the highest CAGR during the forecast period

The pharmaceuticals segment is anticipated to witness the highest CAGR during the forecast period, due to its use in drug encapsulation, particularly in soft and hard capsules. Fish gelatine is preferred over other types due to its high-quality protein content and hypoallergenic properties, making it ideal for sensitive populations. It is increasingly used in the production of dietary supplements, as it is a natural source of

collagen, promoting joint and skin health. The growing trend of health and wellness further boosts the need for fish gelatine-based products in the pharmaceutical industry. Additionally, fish gelatine's compatibility with various active pharmaceutical ingredients (APIs) enhances its appeal for drug formulations. The increasing consumer demand for vegan and halal products has further expanded the market for fish gelatine, particularly in regions with dietary restrictions.

Region with largest share:

Asia Pacific is expected to hold the largest market share during the forecast period due to increased demand across industries like food, pharmaceuticals, and cosmetics. Rising consumer preference for natural and clean-label products has boosted the adoption of fish gelatine as a sustainable alternative to mammalian gelatine. Countries like China, Japan, and India are leading due to their thriving food processing and nutraceutical sectors. Additionally, the region's abundant fish resources and advancements in extraction technologies support cost-efficient production. The trend towards halal and kosher-certified products further enhances market potential, making fish gelatine a preferred choice for diverse applications in the Asia Pacific region.

Region with highest CAGR:

North America is expected to have the highest CAGR over the forecast period, owing to increased demand for natural, sustainable, and allergen-free products. With consumers becoming more health-conscious, fish gelatine is favored for its hypoallergenic properties and its wide application in food, pharmaceuticals, and cosmetics. Its use in functional foods, including dietary supplements and confectionery, is on the rise. The market is also driven by the popularity of halal and kosher-certified products. Moreover, fish gelatine is seen as a sustainable alternative to bovine or porcine gelatine. Despite some challenges in production and processing, North America's fish gelatine market is expected to expand steadily.

Key players in the market

Some of the key players profiled in the Fish Gelatine Market include Nitta Gelatin Inc., Rousselot, Gelita AG, PB Leiner, Sterling Gelatin, Seagel, Weishardt, Hydrocolloids, Kerry Group, Gelatines Weishardt, Great American Seafood, Kraton Polymers, Norland Products, Inc., Azelis, Japan Gelatine Co., Ltd., Collagen Solutions Plc, Ewald-Gelatine GmbH and Tessenderlo Group.

Key Developments:

In November 2024, Rousselot announced a contract for the production of fortified gummies in Europe, which highlights its commitment to expanding its product offerings in the functional food sector. This initiative is part of a broader strategy to enhance health and nutrition products using gelatin and collagen.

In June 2024, Gelita introduced new formulations for protein and cereal bars, emphasizing the integration of their collagen peptides into these products to meet consumer demand for high-protein snacks. This launch reflects Gelita's strategy to innovate within the growing health food market.

In March 2023, Rousselot's collaboration with Gelnex has been significant following Darling Ingredients' acquisition of Gelnex. This acquisition allows Rousselot to leverage Gelnex's production capabilities to meet the rising demand for collagen and gelatin products derived from fish and other sources.

Types Covered:

Type A (from cold-water fish)

Type B (from warm-water fish)

Sources Covered:

Fish Skins

Fish Bones

Fish Scales

Other Sources

Natures Covered:

Organic

Conventional

Forms Covered:

Powder

Sheets

Granules

Capsules

Other Forms

Applications Covered:

Food & Beverages

Pharmaceuticals

Cosmetics & Personal Care

Photography

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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