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Packaging for Seafood Export Market Forecasts to 2032 – Global Analysis by Seafood Form (Fresh/Chilled Seafood Packaging, Frozen Seafood Packaging, Processed Seafood Packaging and Live Seafood Packaging), Packaging Material, Packaging Type, Technology and Geography

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Abstracts

According to Stratistics MRC, the Global Packaging for Seafood Export Market is accounted for $10.7 billion in 2025 and is expected to reach $16.5 billion by 2032 growing at a CAGR of 6.4% during the forecast period. Packaging for seafood export involves using specialized materials and methods to preserve the freshness, quality, and safety of seafood during long-distance transport. It includes solutions for fresh, frozen, and processed seafood, ensuring temperature control, hygiene, and regulatory compliance. Effective packaging reduces spoilage, extends shelf life, and enhances product appeal, playing a vital role in maintaining seafood's market value across global supply chains.

According to the Press Information Bureau (PIB), India's seafood exports rose from 17.54 lakh tonnes in 2022–23 to 18.19 lakh tonnes in 2023–24, marking a 3.73% growth in quantity.

Market Dynamics:

Driver:

Demand for extended shelf life and freshness

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Modern consumers increasingly demand fresh seafood that maintains its nutritional value and taste throughout the supply chain. The expansion of global trade networks requires packaging solutions that can preserve seafood quality during long-distance transportation. Furthermore, rising health consciousness among consumers has intensified the demand for fresh, unprocessed seafood products, compelling manufacturers to invest in advanced packaging technologies that ensure product integrity from catch to consumption.

Restraint:

High cost of specialized packaging

The seafood packaging industry faces significant challenges due to the elevated costs associated with specialized packaging materials and technologies. Advanced packaging solutions such as modified atmosphere packaging and vacuum sealing require substantial capital investment, which particularly affects small and medium-sized seafood businesses. Moreover, the need for compliance with stringent food safety regulations increases operational expenses. The high cost of biodegradable and sustainable packaging materials further constrains market growth.

Opportunity:

Sustainable and eco-friendly packaging solutions

The increasing environmental consciousness among consumers and regulatory pressures to reduce plastic waste present substantial growth opportunities for sustainable packaging solutions. Governments worldwide are implementing stricter regulations on plastic usage, driving demand for biodegradable and recyclable materials. Additionally, the European Union's directive on plastic waste reduction is pushing businesses toward alternative materials such as paper-based and plant-based plastics. Furthermore, manufacturers are investing in research and development to create eco-friendly packaging that maintains the same protective qualities as traditional materials while minimizing environmental impact.

Threat:

Fluctuations in raw material prices

Fluctuations in petroleum-based plastic prices directly impact packaging costs, affecting manufacturers' ability to maintain competitive pricing. Moreover, supply chain disruptions, including shipping delays and labor shortages, can further exacerbate material availability issues. Additionally, the increasing demand for recycled materials has created price instability in the secondary raw material market. These fluctuations force packaging companies to frequently adjust their pricing strategies, potentially impacting long-term customer relationships and market positioning.

Covid-19 Impact:

The COVID-19 pandemic significantly accelerated demand for packaged seafood products as consumers shifted toward convenient, ready-to-eat options during lockdowns. Restaurant closures and social distancing measures redirected seafood consumption from foodservice to retail channels, increasing packaged seafood sales. Additionally, the pandemic heightened consumer awareness of food safety and hygiene, driving preference for prepackaged products over fresh, unpackaged alternatives. However, supply chain disruptions and processing plant outbreaks created operational challenges for packaging manufacturers throughout the crisis period.

The fresh/chilled seafood packaging segment is expected to be the largest during the forecast period

The fresh/chilled seafood packaging segment is expected to account for the largest market share during the forecast period due to increasing consumer preference for minimally processed seafood products that retain their natural taste and nutritional value. This segment benefits from the growing demand for premium seafood in developed markets, where consumers are willing to pay higher prices for fresh products. Furthermore, advancements in cold chain logistics and refrigeration technologies have enabled better preservation of fresh seafood during transportation. Additionally, the expansion of organized retail and supermarket chains has created more opportunities for fresh seafood packaging, as these channels require standardized packaging solutions to maintain product quality and extend shelf life.

The vacuum skin packaging (VSP) segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the vacuum skin packaging (VSP) segment is predicted to witness the highest growth rate due to its superior ability to extend shelf life while maintaining product freshness and visual appeal. This packaging method offers excellent protection against contamination and oxidation, making it particularly suitable for premium seafood products. Moreover, VSP provides enhanced product presentation with clear visibility, which attracts consumers and supports brand differentiation in competitive markets. Additionally, the growing trend toward convenience foods and ready-to-eat meals further drives demand for VSP solutions, as they offer optimal protection for these products.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, with countries like China, Japan, and Southeast Asian nations driving significant demand. China accounts for the majority of global fish production, creating substantial packaging requirements. Furthermore, the region's large coastal populations and traditional seafood-centric cuisines generate consistent demand for packaging solutions. Additionally, the presence of major seafood exporters, including China, Vietnam, and India, further strengthens the region's market position.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR due to expanding aquaculture production and increasing seafood export activities. Rising disposable incomes and changing dietary preferences toward protein-rich foods are driving seafood consumption growth across emerging economies in the region. Moreover, government initiatives supporting aquaculture development and seafood processing industries are creating favorable market conditions. Additionally, the region's strategic focus on developing sustainable packaging solutions aligns with global environmental trends, attracting international investments.

Key players in the market

Some of the key players in Packaging for Seafood Export Market include Amcor plc, Sealed Air Corporation, Berry Global Group, Inc., Mondi Group, DS Smith Plc, Smurfit Kappa Group, Coveris Holdings S.A., Winpak Ltd., Silgan Holdings Inc., Constantia Flexibles Group GmbH, Sonoco Products Company, Cascades Inc., Faerch A/S, Pactiv Evergreen Inc., Printpack, Inc., FFP Packaging Ltd., SIRANE GROUP and Crown Packaging Corp.

Key Developments:

In June 2025, Amcor has expanded its AmFiber™ platform for paper-based packaging,

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now offering solutions for seafood that provide high barrier, shelf life, and machine performance. Amcor's AmFiniti™ portfolio includes recycled-content packaging suitable for seafood, supporting sustainability and circularity goals.

In April 2025, Berry Global will showcase its extensive range of premium-quality fish packaging solutions, tailored to meet the unique requirements of the industry, at this year's Seafood Expo Global/Seafood Processing Global exhibition, being held in Barcelona, Spain, from May 6th to 8th. The Berry stand (#3JJ301 in Hall 3) will feature examples from the company's seafood packaging systems, which include trays, sealing films, absorber and sealing machines. These offer numerous benefits, including extended shelf-life, enhanced hygiene, and reduced logistics and storage costs.

In April 2024, Forging a new path forward into 2024 and beyond, SEE and Ossid have launched a new global partnership to provide case-ready processors a total solution for their tray overwrapping machinery and material needs. The combination of equipment, materials and services from SEE and Ossid will allow customers to achieve operational efficiency and sustainability goals and objectives for fresh protein producers.

Seafood Forms Covered:

- Fresh/Chilled Seafood Packaging
- Frozen Seafood Packaging
- Processed Seafood Packaging
- Live Seafood Packaging

Packaging Materials:

- Plastic Packaging
- Paper and Paperboard Packaging
- Metal Packaging
- Glass Packaging

Bio-based & Sustainable Materials

Other Packaging Materials

Packaging Types Covered:

Flexible Packaging

Rigid Packaging

Intermediate Bulk Containers (IBCs) & Industrial Packaging

Technologies Covered:

Modified Atmosphere Packaging (MAP)

Vacuum Packaging

Vacuum Skin Packaging (VSP)

Active Packaging

Intelligent Packaging

Aseptic Packaging

Retort Packaging

Other Technologies

Regions Covered:

North America

US

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- 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 2024, 2025, 2026, 2028, and 2032
- 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)

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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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Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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