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Sustainable Aquaculture Foods Market Forecasts to 2034 – Global Analysis By Species (Finfish, Shellfish, Seaweed & Algae and Alternative Seafood), Farming System, Form, Certification, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Sustainable Aquaculture Foods Market is accounted for $14.6 billion in 2026 and is expected to reach $38.4 billion by 2034 growing at a CAGR of 12.8% during the forecast period. Sustainable aquaculture foods refer to seafood, shellfish, seaweed and algae, and alternative seafood products produced through environmentally responsible farming systems including recirculating aquaculture systems, offshore aquaculture operations, integrated multi-trophic aquaculture, and land-based flow-through systems that minimize ecosystem impact, reduce antibiotic use, optimize feed conversion efficiency, maintain water quality through waste treatment, and achieve third-party sustainability certification including ASC, BAP, and organic aquaculture standards for consumer and institutional buyer market access.

Market Dynamics:

Driver:

a

Wild Catch Fishery Depletion Sustainability Imperative

Global wild-catch fishery depletion from overfishing affecting 90 percent of monitored global fish stocks creating seafood supply chain security concerns is compelling food

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retailers, restaurant chains, and consumers to shift purchasing toward certified sustainable aquaculture-farmed seafood alternatives. Corporate seafood sustainability procurement commitments from major food retail and foodservice operators requiring ASC or equivalent certification for all seafood supply is generating institutional market demand for certified sustainable aquaculture products that creates commercial incentive for aquaculture operator sustainability certification investment.

Restraint:

Aquaculture Sustainability Certification Cost Complexity

Third-party aquaculture sustainability certification program costs and operational protocol compliance requirements from ASC, BAP, and organic aquaculture standards creating significant investment obligations for small and medium aquaculture operators whose production economics cannot absorb certification overhead without premium market access price realization, limiting sustainable certification adoption among the majority of global aquaculture production that remains outside sustainability certification frameworks despite consumer and buyer demand for certified sustainable product sourcing.

Opportunity:

Land-Based Recirculating Aquaculture Premium Market

Land-based recirculating aquaculture system salmon and premium fish production near major urban consumer markets enabling fresh-never-frozen sustainability-certified premium seafood supply independent of traditional ocean salmon farming geographic constraints represents a high-value market opportunity as demonstrated by Atlantic Sapphire's US land-based salmon program creating domestic US premium salmon supply. RAS technology cost reduction enabling economically viable premium fish production is creating new domestic market supply channels in consumer markets previously entirely dependent on international aquaculture imports.

Threat:

Cell-Cultured Seafood Technology Disruption

Cell-cultured seafood technology development from companies including Wildtype and BlueNalu producing salmon, shrimp, and other seafood from cell culture without

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aquaculture infrastructure potentially creating a long-term competitive technology trajectory that could displace conventional aquaculture market positions as cell-cultured seafood regulatory approval expands and production scale economies improve. Early cell-cultured seafood product launches in approved markets are establishing consumer acceptance precedents that may influence seafood production technology investment priorities.

Covid-19 Impact:

COVID-19 supply chain disruptions affecting wild-caught seafood logistics and restaurant foodservice closure creating retail seafood demand surge accelerated consumer and retail buyer awareness of sustainable aquaculture certified seafood availability as reliable supply chain alternatives to volatile wild-catch products. Post-pandemic food security investment, ocean ecosystem awareness elevation, and sustainable sourcing consumer consciousness continue driving demand growth for certified sustainable aquaculture food products globally.

The alternative seafood segment is expected to be the largest during the forecast period

The alternative seafood segment is expected to account for the largest market share during the forecast period, due to the intersection of plant-based diet growth with sustainable seafood demand creating rapidly expanding consumer markets for high-quality plant-based and cell-cultured seafood alternatives that address both dietary preference and ocean sustainability concerns simultaneously. Premium alternative seafood products including kelp-based seafood substitutes, microalgae-derived omega-3 rich products, and cell-cultured fish command the highest per-unit value in sustainable aquaculture foods category commercial positioning.

The recirculating aquaculture systems segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the recirculating aquaculture systems segment is predicted to witness the highest growth rate, driven by significant technology investment and commercial scale-up of land-based RAS salmon, trout, and premium fish production facilities near major consumer markets enabling fresh premium seafood supply with minimal environmental impact from disease risk, escape contamination, or benthic ecosystem disruption. Government investment programs in Norway, Denmark, US, and Singapore funding RAS aquaculture technology development are accelerating the segment's commercial scaling trajectory.

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Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, due to the United States hosting the world's most active sustainable aquaculture foods commercial development market with significant RAS technology investment, leading sustainable aquaculture companies including Cooke Inc., Clearwater Seafoods, and emerging RAS operators generating substantial North American revenue, and strong institutional sustainable seafood procurement from restaurant chains and retailers.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, due to China, Japan, Norway-connected operations in Australia, and Southeast Asian nations hosting large-scale sustainable aquaculture expansion investment programs, rapidly growing domestic premium seafood consumption markets, and significant government aquaculture technology investment creating rapid sustainable production capacity expansion across Asia Pacific's dominant global seafood producing and consuming regions.

Key players in the market

Some of the key players in Sustainable Aquaculture Foods Market include Mowi ASA, Cermaq Group AS, SalMar ASA, Ler?y Seafood Group ASA, Thai Union Group PCL, Austevoll Seafood ASA, High Liner Foods Incorporated, Nissui Corporation, Maruha Nichiro Corporation, Cooke Inc., Tassal Group Limited, Clearwater Seafoods Inc., BlueNalu Inc., Wildtype, Atlantic Sapphire ASA, and Australis Aquaculture.

Key Developments:

In April 2026, Atlantic Sapphire ASA announced commercial harvest commencement from its Phase 2 US land-based RAS salmon facility achieving 10,000 metric ton annual capacity delivering fresh never-frozen US domestic Atlantic salmon to major retail and foodservice customers.

In March 2026, Thai Union Group PCL launched a new ASC-certified sustainable tuna product range across European retail markets with full supply chain traceability from vessel to consumer via blockchain-verified documentation enabling premium

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sustainable sourcing claim substantiation.

In January 2025, Wildtype secured US FDA acceptance of its cell-cultured salmon safety notification enabling limited commercial sales launch of its cell-cultivated salmon fillet product through premium restaurant and specialty retailer channels in California and New York.

Species Covered:

- Finfish
- Shellfish
- Seaweed & Algae
- Alternative Seafood

Farming Systems Covered:

- Recirculating Aquaculture Systems
- Offshore Aquaculture
- Integrated Multi-Trophic Aquaculture
- Land-Based Flow-Through

Forms Covered:

- Fresh & Chilled
- Frozen
- Value-Added
- Canned & Preserved

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Certifications Covered:

- ASC Certified
- BAP Certified
- MSC Certified
- Organic Aquaculture

End Users Covered:

- Retail
- Foodservice
- Industrial Ingredients

Regions Covered:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - United Kingdom
  - Germany
  - France
  - Italy

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- Spain
- Netherlands
- Belgium
- Sweden
- Switzerland
- Poland
- Rest of Europe

Asia Pacific

- China
- Japan
- India
- South Korea
- Australia
- Indonesia
- Thailand
- Malaysia
- Singapore
- Vietnam
- Rest of Asia Pacific

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South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

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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 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- 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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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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