

Sustainable Seafood Market Forecasts to 2032 – Global Analysis By Product (Fresh, Frozen, Smoked, Canned and Value-Added Products), Species Type, Source, Sustainability Certification, Distribution Channel and By Geography

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Abstracts

According to Statistics MRC, the Global Sustainable Seafood Market is accounted for \$12.4 billion in 2025 and is expected to reach \$15.0 billion by 2032 growing at a CAGR of 2.8% during the forecast period. Sustainable seafood refers to fish and shellfish harvested or farmed in ways that respect the ocean's rhythms, protect marine ecosystems, and ensure future generations can draw nourishment from the same waters. It relies on responsible fishing limits, traceable supply chains, and aquaculture practices that avoid pollution, habitat damage, and overexploitation. Certified sustainable seafood comes from stocks that are healthy, monitored, and managed with long-term stewardship in mind. In a world racing ahead, sustainable choices echo the wisdom of older traditions take only what the sea can spare, give the ecosystem room to recover, and keep the balance that feeds us all.

Market Dynamics:

Driver:

Growing Demand for Ethical Food

The growing demand for ethical food is a powerful driver of the sustainable seafood market. Consumers are increasingly aware of the environmental and social impacts of their dietary choices, favoring products that respect ecosystems and communities. Sustainable seafood, harvested responsibly and transparently, aligns with this shift

toward conscious consumption. Certifications and traceable supply chains reassure buyers that their purchases support healthy oceans and fair practices. As ethical food trends expand globally, sustainable seafood benefits from rising demand across retail and hospitality sectors.

Restraint:

High Production Costs

High production costs remain a significant restraint for the market. Implementing eco-friendly fishing practices and investing in traceable supply chains require substantial resources. Aquaculture operations that avoid pollution and habitat damage often involve advanced technologies, further raising expenses. These costs can make sustainable seafood less competitive compared to conventional alternatives, limiting accessibility for price-sensitive consumers. Unless efficiencies improve or subsidies support producers, high costs may slow adoption, challenging the industry's ability to scale while maintaining environmental integrity.

Opportunity:

Rise of Aquaculture Innovation

The rise of aquaculture innovation presents a major opportunity for the sustainable seafood market. Advances in farming techniques, such as closed-loop systems and eco-friendly feed, reduce environmental impact while boosting yields. These innovations help meet growing demand without overexploiting wild fish stocks, ensuring long-term sustainability. Technology also enhances monitoring and traceability, strengthening consumer trust in certified products. As aquaculture evolves into a more responsible and efficient industry, it offers scalable solutions to balance global seafood consumption with ocean conservation goals.

Threat:

Supply Chain Complexity

Supply chain complexity poses a notable threat to the market. Ensuring traceability from ocean to plate requires coordination across multiple stakeholders, including fishers, processors, distributors, and retailers. Variations in regional regulations and certification standards add further challenges. Any gaps in transparency risk undermining consumer

confidence and certification credibility. Managing logistics while maintaining sustainability commitments can increase costs and delays. Without streamlined systems, supply chain complexity may hinder the industry's ability to deliver consistent, reliable sustainable seafood globally.

Covid-19 Impact:

The Covid-19 pandemic had a mixed impact on the sustainable seafood market. Disruptions in global supply chains and reduced restaurant demand initially slowed growth. However, heightened consumer focus on health and sustainability during the crisis boosted interest in responsibly sourced food. Retail channels saw increased demand for certified seafood as households prioritized ethical and nutritious choices. Producers adapted by strengthening e-commerce and direct-to-consumer models. Post-pandemic recovery has reinforced sustainable seafood's role as a resilient category aligned with evolving consumer values.

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

The shellfish segment is expected to account for the largest market share during the forecast period as they are widely consumed across diverse cuisines and regions. Their farming and harvesting practices can be adapted to sustainable models, making them a reliable source of protein with lower ecological footprints compared to some finfish. Strong demand in Asia Pacific and Europe supports growth, while certifications ensure consumer confidence. Shellfish's versatility and popularity position the segment as a cornerstone of sustainable seafood expansion.

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

Over the forecast period, the MSC certified segment is predicted to witness the highest growth rate, as certification by the Marine Stewardship Council assures consumers that seafood comes from responsibly managed fisheries. Rising awareness of sustainability and traceability drives demand for certified products across retail and foodservice channels. MSC certification enhances brand credibility, encouraging producers to adopt eco-friendly practices. As ethical consumption trends accelerate, certified seafood gains preference, making this segment the fastest-growing category and a benchmark for responsible stewardship in the industry.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, due to region's vast coastline, rich marine biodiversity, and strong seafood consumption culture drive demand. Countries like China, Japan, and India are major consumers, while aquaculture innovations further support supply. Growing awareness of sustainability, coupled with government initiatives, strengthens adoption of responsible practices. With its scale and diversity, Asia Pacific remains the dominant hub for sustainable seafood, shaping global trends and influencing industry standards.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to rising consumer awareness, strong demand for ethical food, and robust certification frameworks fuel growth. The United States and Canada lead in adopting traceable supply chains and eco-friendly aquaculture practices. Retailers and restaurants increasingly prioritize certified seafood, reinforcing market expansion. With consumers willing to pay premiums for sustainability, North America's market is set to grow rapidly, positioning the region as a leader in innovation and ethical seafood consumption.

Key players in the market

Some of the key players in Sustainable Seafood Market include Thai Union Group, Sanford Limited, Mowi ASA, Sea Harvest Group, Maruha Nichiro Corporation, BlueNalu, Nippon Suisan Kaisha, Cermaq Group, Dongwon Industries, Clearwater Seafoods, Austevoll Seafood ASA, Cooke Aquaculture, High Liner Foods, Nueva Pescanova Group, and Trident Seafoods.

Key Developments:

In May 2025, Maruha Nichiro has formed a strategic partnership with Senko Group Holdings, a Japanese logistics and distribution firm, to share transportation, warehousing, and delivery functions, pool training resources, and jointly develop global supply-chain strategies.

In November 2024, Cooke Inc. has signed a binding share-purchase agreement to acquire Copeinca of Peru, one of the world's largest fishmeal and fish oil producers. The deal will bolster Cooke's marine-ingredients business, diversify its geographic reach, and support global food security.

Products Covered:

Fresh

Frozen

Smoked

Canned

Value-Added Products

Species Types Covered:

Salmon

Shellfish

Tuna

Tilapia

Shrimp

Other Species Types

Sources Covered:

Wild-Caught

Aquaculture

Sustainability Certifications Covered:

MSC Certified

Organic

ASC Certified

Non-Certified

Distribution Channels Covered:

Supermarkets/Hypermarkets

Online Retail

Specialty Stores

HoReCa

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 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)

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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