

# **Processed Seafood Market- Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Crustaceans, Fish, Molluscs), By Product (Frozen, Smoked and Others), By Distribution Channel (Hypermarkets, Supermarkets, Food Specialty Stores, Convenient Stores and Others), By Region & Competition, 2021-2031F**

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## **Abstracts**

The global processed seafood market is projected to expand significantly, rising from USD 302.72 billion in 2025 to USD 445.71 billion by 2031, demonstrating a compound annual growth rate (CAGR) of 6.66%. This market encompasses aquatic products preserved via methods like freezing, canning, curing, or smoking, designed to extend shelf life and simplify meal preparation. Its expansion is primarily fueled by increasing worldwide protein consumption and a stronger consumer demand for convenience, a trend accelerated by rapid urbanization. These foundational drivers underscore a sustained need for shelf-stable marine food options that align with contemporary logistical requirements and busy consumer lifestyles, rather than being mere temporary dietary fads. Nevertheless, the processed seafood industry faces notable challenges, including issues with supply chain sustainability and fluctuating raw material prices. Although global seafood export value was projected to hit USD 193.3 billion in 2025, a 5% increase over the previous year, according to the Food and Agriculture Organization, stringent regulations aimed at preventing overfishing and ensuring product traceability pose a significant hurdle. These regulations could complicate international trade and elevate operational costs for producers.

## **Market Driver**

A key driver for market growth is the escalating global demand for convenient and ready-to-cook seafood products, largely due to accelerating urbanization and reduced meal preparation time. Consumers are increasingly opting for shelf-stable, canned, and frozen seafood options that provide nutritional value without extensive cooking. This trend is reflected in major industry players expanding their value-added offerings; for example, Thai Union Group reported a 7.1% increase in ambient seafood sales in 2024, driven by strong demand for accessible, preserved marine products in international markets, as stated in January 2026. Concurrently, growing consumer awareness of the health advantages of seafood-rich diets is also boosting the industry. People globally recognize aquatic foods as vital sources of high-quality protein and Omega-3 fatty acids, leading to consistent volume growth for both wild-caught and farmed products consumed directly. The Food and Agriculture Organization projected global seafood consumption for direct human food to reach 176 million tonnes in 2025. Mowi ASA further exemplifies the sector's strong financial standing, reporting record operational revenue of EUR 5.62 billion in 2024, as noted in March 2025, highlighting the significant scale of today's seafood industry.

## **Market Challenge**

The global processed seafood market faces significant limitations due to stringent regulatory frameworks designed to prevent overfishing and enforce traceability. These government-imposed restrictions directly limit the availability of raw materials, creating bottlenecks that hinder manufacturers from scaling production to meet increasing consumer demand. By capping the harvest volume of crucial commercial species, these regulations compel processing facilities to operate below their full capacity and contend with unpredictable supply chains. This scarcity of compliant raw materials inflates procurement costs, which eroding profit margins and constrains the industry's capacity to sustain consistent output or expand into new, volume-driven markets. The concrete effects of these sustainability measures are demonstrated by recent reductions in harvesting limits for popular species. For instance, the European Market Observatory for Fisheries and Aquaculture Products (EUMOFA) reported a 25% reduction in the total allowable catch for Northeast Arctic cod in 2025 compared to the previous year. This substantial decrease in available biomass forces processors into heightened competition for limited resources, thereby increasing operational instability and directly impeding the market's financial and volumetric expansion.

## **Market Trends**

Processing facilities are increasingly adopting robotic systems to alleviate ongoing labor

shortages and optimize raw material yield, thereby effectively resolving operational constraints caused by workforce instability. This technological advancement enables manufacturers to automate intricate tasks like filleting and deboning with high precision, ensuring consistent product quality while diminishing dependence on manual labor in expensive regions. By implementing these sophisticated systems, companies can sustain production rates even amid strict harvest limitations imposed by regulatory frameworks. Mowi ASA, for instance, in its 'Integrated Annual Report 2024' (March 2025), indicated plans to boost its capital expenditure to EUR 310 million in 2025, specifically for automation upgrades at its consumer product plants to improve operational efficiency. Concurrently, the market is observing a clear trend towards the premiumization of shelf-stable tinned seafood, transforming it from a basic commodity into a gourmet culinary item. Brands are actively launching artisanal products, often packaged in superior oils and distinctive designs, to attract affluent consumers seeking unique gastronomic experiences. This strategy prioritizes value over volume, effectively mitigating raw material cost volatility by commanding considerably higher per-unit prices and distinguishing modern tinned fish from conventional mass-market offerings. Thai Union Group, in its 'Annual Review' (January 2026), reported a record gross profit margin of 18.5% in 2024, largely attributed to the organic growth of its value-added and ambient seafood categories.

## Key Market Players

Thai Union Group PCL

Maruha Nichiro Corporation

Dongwon Industries Co., Ltd.

High Liner Foods Incorporated

Nomad Foods Limited –

Tri Marine International, Inc.

Bumble Bee Foods, LLC

Royal Greenland A/S

Stolt Sea Farm ASA

Salmar ASA

## Report Scope

In this report, the Global Processed Seafood Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Processed Seafood Market, By Type

Crustaceans

Fish

Molluscs

### Processed Seafood Market, By Product

Frozen

Smoked

Others

### Processed Seafood Market, By Distribution Channel

Hypermarkets

Supermarkets

Food Specialty Stores

Convenient Stores

Others

### Processed Seafood Market, By Region

## North America

United States

Canada

Mexico

## Europe

France

United Kingdom

Italy

Germany

Spain

## Asia Pacific

China

India

Japan

Australia

South Korea

## South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

### **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Processed Seafood Market.

### **Available Customizations:**

Global Processed Seafood Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### **Company Information**

Detailed analysis and profiling of additional market players (up to five).

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