

Salmon Fish Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Species (Atlantic/ Aquaculture, Pacific), By Form (Fresh, Frozen, Others), By Region & Competition, 2019-2029F

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Abstracts

Global salmon fish market was valued at USD 18.46 Billion in 2023 and is expected to reach USD 28.97 Billion by 2029 with a CAGR of 7.8% during the forecast period. The global salmon fish market is experiencing substantial growth, driven by rising demand for protein-rich and healthy food options. Increasing health consciousness among consumers, coupled with the recognition of salmon as a nutrient-dense source of omega-3 fatty acids, proteins, and vitamins, is a key growth driver. Moreover, salmon's versatility in various culinary applications has contributed to its widespread popularity. The market is further bolstered by advancements in aquaculture technology, ensuring steady production to meet growing demand.

By species, the market is segmented into Atlantic salmon (primarily aquaculture) and Pacific salmon. Atlantic salmon is in demand due to its extensive cultivation through aquaculture, ensuring consistent supply and year-round availability. Its favourable taste profile, texture, and controlled farming practices make it a preferred choice globally. Pacific salmon, largely wild-caught, holds a significant share in regions with high natural production, such as North America and parts of Asia, but seasonal availability and sustainability challenges slightly limit its growth compared to Atlantic salmon.

By form, the market is categorized into fresh, frozen, and others. The fresh segment is driven by consumer preference for premium, high-quality salmon, particularly in North America and Europe, where freshness is valued for direct consumption. The rise of specialized retail chains and seafood markets further fuels this segment. The frozen

salmon segment is expanding rapidly, particularly in regions with limited access to fresh seafood or where preservation for extended periods is critical. Emerging economies in Asia-Pacific are significant contributors to this growth due to changing dietary habits, urbanization, and increased purchasing power. The others category, which includes canned and smoked salmon, holds a niche yet growing market share, driven by convenience and extended shelf life, particularly in ready-to-eat and processed food industries.

Key factors propelling the salmon fish market include technological innovations in aquaculture, which address environmental challenges like sea lice and promote sustainable production. Additionally, expanding global trade networks, increasing seafood consumption trends, and government initiatives promoting sustainable fishing are shaping the market's trajectory. However, challenges such as overfishing, regulatory constraints, and environmental concerns remain.

Norwegian firm Lerøy is expanding its seaweed and mussel farming operations—Ocean Forest and Ocean Harvest—after investing annually to enhance food production and lessen the environmental impact of fish farming. Faroe Islands' Ocean Rainforest has received USD 2.78 million in funding to boost large-scale seaweed cultivation, which benefits both marine biodiversity and coastal communities while also working on expansion efforts in California. Additionally, the North Sea Farm 1 project, located between wind turbines off the Dutch coast, marks the first commercial seaweed farm aimed at carbon capture and aligns with the EU Algae Initiative's ecological goals, showcasing the industry's potential in addressing climate change.

Overall, the salmon fish market is poised for continued growth, driven by demand for healthy protein sources, advancements in farming techniques, and evolving consumer preferences toward high-quality, fresh, and sustainable seafood options.

Market Drivers

Rising Health Awareness and Demand for Protein-Rich Food

One of the most significant drivers of the salmon fish market is the increasing awareness of the health benefits associated with salmon consumption. As global consumers shift toward healthier dietary habits, salmon has become a preferred protein source due to its rich nutritional profile. Salmon is a highly nutritious fish, offering an excellent source of omega-3 fatty acids, essential for heart health, brain function, and inflammation reduction. It is also packed with high-quality protein, vitamins (B12, D),

and minerals like selenium and potassium, making it ideal for health-conscious individuals, athletes, and those following specific diets such as keto or Mediterranean. The survey insights on eating patterns highlight a growing trend among consumers toward adopting healthier and targeted dietary habits, which directly supports the demand for salmon in the global fish market.

In a survey conducted by the International Food Information Council (IFIC), with 52% of Americans following a specific eating pattern or diet, salmon is well-positioned to cater to these evolving preferences as a high-protein, nutrient-dense food option. The fact that 18% of Americans followed a high-protein diet demonstrates, salmon's role as a premium protein source. Salmon is rich in lean, high-quality protein, making it ideal for individuals aiming to build muscle, manage weight, or enhance overall health. This trend is particularly strong among Gen Z (66%) and Millennials (63%), who are more likely to adopt protein-focused and mindful eating habits. This demographic's preference aligns perfectly with salmon's nutritional benefits, including its versatility in various high-protein meals such as grilled fillets, salads, and meal-prep dishes. The growing prevalence of lifestyle-related diseases, such as cardiovascular disorders, obesity, and diabetes, has led to a significant shift toward consuming functional foods that provide health benefits. Salmon, being lean and low in saturated fats, aligns perfectly with these trends. Furthermore, increased awareness campaigns about the benefits of omega-3 fatty acids have propelled demand for salmon among all age groups, particularly in developed markets like North America and Europe.

Technological Advancements in Aquaculture

Technological advancements in aquaculture, particularly in Atlantic salmon farming, are playing a vital role in driving the salmon market. With global wild salmon resources facing sustainability and overfishing challenges, aquaculture has emerged as a critical solution to meet the surging demand for salmon. Modern aquaculture technologies, such as submerged installations, semi-closed systems, and recirculating aquaculture systems (RAS), have enhanced production efficiency while addressing environmental concerns such as sea lice infestations and water pollution.

For instance, innovative farming methods ensure optimal fish health, better yields, and reduced environmental impacts, which align with global sustainability goals. The adoption of site-specific technologies enables salmon farmers to produce fish in controlled environments, ensuring consistent supply year-round. Moreover, advancements in feed formulations, disease management, and digital monitoring tools have improved the overall productivity and quality of farmed salmon. These

technological developments are particularly relevant in markets like Norway, Chile, and Scotland, where aquaculture dominates salmon production.

Growing Seafood Consumption Worldwide

The third major driver for the salmon fish market is the steady rise in seafood consumption worldwide, fueled by shifting dietary preferences, growing incomes, and urbanization, particularly in emerging economies. In countries across Asia-Pacific, such as China, India, and Japan, the demand for seafood, including salmon, has surged due to changing eating habits and an increasing appetite for protein-rich diets. Salmon, often perceived as a premium product, is becoming more accessible in these markets through improved cold chain infrastructure and rising imports. The 2024 edition of The State of World Fisheries and Aquaculture (SOFIA) reported that global fisheries and aquaculture production reached 223.2 million tonnes in 2022, marking a 4.4% increase compared to 2020. Of this total, 185.4 million tonnes consisted of aquatic animals. Additionally, global trade networks and the expansion of e-commerce platforms have made salmon more available to consumers, even in regions where it was traditionally scarce. The frozen and canned salmon segments have gained traction in emerging markets where fresh fish access may be limited. Furthermore, the rising trend of ready-to-eat meals and convenience foods has spurred demand for processed salmon products, such as smoked and filleted salmon.

In mature markets, such as Europe and North America, salmon remains one of the most consumed fish species, driven by strong retail distribution networks, premium dining preferences, and consumer focus on high-quality, sustainably sourced seafood.

Key Market Challenges

Environmental and Sustainability Concerns

One of the most pressing challenges for the salmon market is the growing scrutiny over the environmental impact of salmon farming, particularly in aquaculture, which dominates global production. Large-scale salmon farming operations can contribute to water pollution, habitat degradation, and loss of biodiversity. Nutrient runoff from feed and waste can lead to harmful algal blooms, which damage ecosystems and negatively affect surrounding marine life.

Sustainability is further challenged by the heavy reliance on wild-caught fish, such as anchovies and sardines, for salmon feed production. This puts additional pressure on

wild fish stocks, raising concerns about overfishing and resource depletion. While alternative feed sources like algae and plant-based proteins are being explored, scaling these solutions remains a work in progress.

In response to increasing environmental awareness, regulatory requirements around sustainable aquaculture practices are becoming stricter. Certification standards like the Aquaculture Stewardship Council (ASC) and consumer demand for responsibly farmed fish are pushing producers to adopt greener practices. However, implementing and maintaining these sustainable measures can be resource-intensive and costly, particularly for small- to medium-scale producers, creating a barrier to market entry and profitability.

Disease Management and Sea Lice Infestations

Disease outbreaks and sea lice infestations represent significant biological challenges for the salmon fish market. Sea lice, parasites that attach to fish and cause stress, skin damage, and reduced growth rates, are a recurring problem in salmon farms, particularly in major producing regions like Norway and Chile. Managing sea lice requires treatments that can be costly, labor-intensive, and harmful to both fish welfare and the surrounding environment.

In addition to sea lice, bacterial and viral diseases such as Infectious Salmon Anemia (ISA) and Pancreas Disease (PD) pose threats to production. Disease outbreaks often result in high mortality rates, substantial financial losses, and the need for antibiotics and chemicals, which can further harm ecosystems and tarnish the industry's reputation.

Sea lice also remain a significant challenge in salmon farming, impacting both fish growth and welfare. To address this, the Coastal Production Technology program was launched in 2022 to evaluate technologies designed to shield farmed salmon from sea lice. Lerøy, a key player in the industry, has been implementing site-specific technologies, including fully submerged and semi-closed installations. By the end of 2024, Lerøy plans to have 12 new installations (10 submerged, 2 semi-closed), with about one-third of its salmon raised using these “shielding” technologies. This includes half of the salmon in Lerøy Midt and a third in Lerøy Sjøtroll. These advancements are expected to significantly reduce sea lice treatments in 2024, with further improvements anticipated in 2025 as more fish from these systems reach harvestable size.

While innovative technologies, such as semi-closed systems, submerged installations,

and cleaner fish, are helping mitigate these issues, they require significant investment. Smaller producers may struggle to adopt these technologies, widening the gap between large-scale farms and smaller operations.

Supply Chain Disruptions and Cost Volatility

The global salmon market is highly sensitive to supply chain disruptions and input cost volatility. Factors such as fluctuating feed prices, transportation challenges, and geopolitical tensions can disrupt the smooth flow of production and distribution. Feed costs, which account for a substantial portion of production expenses, have surged in recent years due to rising prices of raw materials like fishmeal, fish oil, and alternative plant-based proteins.

In addition, global supply chains remain vulnerable to climate events, natural disasters, and pandemics, which can delay harvests, impact logistics, and create supply shortages. For instance, extreme weather events caused by climate change can disrupt aquaculture operations, leading to reduced yields and higher prices. Similarly, geopolitical instability and trade barriers, such as tariffs, sanctions, or export restrictions, can further complicate global salmon trade, affecting both producers and consumers.

Rising operational costs, including energy and labor expenses, add another layer of pressure on profitability. Producers must balance these increasing costs while meeting consumer demands for affordability, sustainability, and quality.

Key Market Trends

Adoption of Sustainable and Innovative Aquaculture Practices

Sustainability has become a cornerstone of the salmon industry, as environmental concerns and regulatory pressures push producers to adopt more responsible aquaculture practices. Traditional open-net pens, while effective for high yields, have raised concerns over their environmental impact, including sea lice outbreaks, pollution, and habitat disruption. In response, salmon producers are investing heavily in innovative aquaculture technologies that reduce environmental risks and promote fish welfare.

Key trends include the adoption of semi-closed and fully submerged systems, which shield fish from parasites like sea lice while minimizing waste discharge into natural water systems. For instance, companies in Norway and Scotland have pioneered

submerged installations that allow for cleaner, healthier growth environments, helping to maintain fish health without relying on chemical treatments. Similarly, recirculating aquaculture systems (RAS) are gaining traction, particularly in regions with limited access to coastal waters. RAS allows salmon to be farmed in controlled, land-based environments, significantly reducing environmental footprints while ensuring year-round production close to markets.

Another notable development is the exploration of alternative feeds, such as insect protein, algae-based feed, and plant-based protein sources, to replace traditional fishmeal and fish oil. By reducing dependency on wild fish for feed, these innovations contribute to the overall sustainability of the industry while addressing concerns about overfishing and marine biodiversity loss. These efforts align with global sustainability certifications, such as ASC (Aquaculture Stewardship Council) and Global G.A.P., which are becoming increasingly important for gaining consumer trust.

Rise of Value-Added and Processed Salmon Products

As consumer lifestyles become more fast-paced, there is growing demand for value-added and ready-to-eat (RTE) salmon products. This trend reflects a shift in preferences toward convenient, time-saving options without compromising on health benefits or quality. Processed salmon products such as smoked salmon, marinated fillets, frozen portions, canned salmon, and salmon-based spreads are increasingly popular in both developed and emerging markets.

Smoked salmon has witnessed significant growth due to its premium positioning and versatility in meals, including salads, sandwiches, and appetizers. In addition, frozen salmon products are gaining traction as they offer extended shelf life and easier storage, particularly in regions where fresh seafood is less accessible. This has been further bolstered by advancements in freezing technology, which maintain the texture, taste, and nutritional quality of salmon.

The emergence of flavored and pre-seasoned salmon portions caters to the younger demographic and urban populations looking for quick meal solutions. Innovations like salmon burgers, sushi-grade salmon kits, and salmon jerky further expand the market by introducing new product categories that appeal to adventurous and health-conscious consumers. Value-added products also allow producers to achieve higher profit margins, making this segment particularly attractive for growth.

Increased Focus on Traceability and Transparency

In an era where consumers are more informed and conscious of their purchasing decisions, traceability and transparency have become critical trends in the salmon market. Growing awareness of food safety, ethical sourcing, and sustainability has pushed consumers to demand greater visibility into the entire production process—from farming and harvesting to processing and distribution.

Technological solutions like blockchain, RFID (radio-frequency identification), and QR code tracking are being implemented to ensure complete transparency across the supply chain. For example, consumers can now scan a QR code on salmon packaging to access information about the fish's origin, farming methods, feed quality, and certifications. This level of detail builds consumer trust and allows producers to differentiate their products in a competitive market.

Additionally, traceability is becoming increasingly important to meet regulatory requirements and sustainability standards. In the European Union and North America, for instance, strict regulations mandate detailed reporting of aquaculture practices and fish origins. Certifications such as the Marine Stewardship Council (MSC) and Aquaculture Stewardship Council (ASC) further encourage the adoption of transparent practices to ensure responsibly sourced salmon.

Transparency also ties into ethical consumerism, where buyers prefer brands that demonstrate commitment to worker welfare, environmental stewardship, and animal welfare. By leveraging technology and providing clear, verifiable information, salmon producers can strengthen their market position and cater to the growing demand for ethical and sustainable food.

Segmental Insights

Species Insights

The Atlantic salmon, primarily farmed through aquaculture, holds the largest share in the salmon market, accounting for most of the global production and consumption. Atlantic salmon farming accounts for over 70% of the global salmon supply. The expansion of aquaculture operations, particularly in regions such as Norway, Chile, Scotland, and Canada, has ensured consistent availability of Atlantic salmon throughout the year. Atlantic salmon is widely preferred for its mild flavor, consistent texture, and versatility, making it a staple in cuisines across North America, Europe, and Asia-Pacific. It is heavily featured in both retail and foodservice sectors, including sushi,

smoked products, and ready-to-cook meals.

Aquaculture has enabled scalable and cost-efficient production of Atlantic salmon compared to wild-caught Pacific varieties. This affordability makes Atlantic salmon accessible to a broader consumer base. The dominance of Atlantic/Aquaculture salmon is further supported by technological advancements in farming practices, which have improved fish health, increased yields, and addressed environmental concerns through innovations like semi-closed and submerged systems.

Regional Insights

Europe was the dominated region in the global salmon fish market, both in terms of production and consumption. This dominance is driven by well-established aquaculture operations, high consumer demand, and advanced cold chain logistics. Europe, particularly Norway and Scotland, dominates the global production of farmed Atlantic salmon. Norway is the world's largest producer of Atlantic salmon, accounting for over 50% of global production. The country's advanced aquaculture technologies, efficient farming practices, and commitment to sustainability have made it a leader in salmon production.

Scotland, another key European player, is renowned for producing premium-quality salmon, which is exported to major markets worldwide, including the U.S., Japan, and China. Europe has one of the highest per capita seafood consumption rates, with salmon being a staple in diets due to its health benefits, versatility, and premium quality.

The region is also a major exporter of salmon, with significant shipments to North America and Asia, meeting the growing global demand for high-quality salmon products. European producers are at the forefront of adopting sustainable aquaculture practices, including semi-closed and recirculating aquaculture systems (RAS), which address environmental concerns and improve production efficiency.

Certifications such as the Aquaculture Stewardship Council (ASC) and growing consumer interest in responsibly sourced seafood have further strengthened the region's leadership in the market. Europe's consumers favor fresh salmon, which is widely available due to advanced supply chain infrastructure. Additionally, the demand for value-added products such as smoked salmon, marinated fillets, and ready-to-eat options is robust, driven by busy lifestyles and health-conscious eating trends.

Key Market Players

Lerøy Seafood Group ASA

SalMar ASA

Cermaq Group AS

Mowi ASA

P/F Bakkafrøst Holding

SEA DELIGHT LLC

Nordlaks AS

Atlantic Sapphire ASA

Ideal Foods Ltd

BluGlacier, LLC

Report Scope:

In this report, the global salmon fish market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

· Salmon Fish Market, By Species:

Atlantic/ Aquaculture

Pacific

· Salmon Fish Market, By Form:

Fresh

Frozen

Others

· Salmon Fish Market, By Region:

North America

United States

Canada

Mexico

Europe

France

Germany

Spain

Italy

United Kingdom

Asia-Pacific

China

Japan

India

Vietnam

South Korea

Middle East & Africa

South Africa

Saudi Arabia

UAE

Turkey

Kuwait

Egypt

South America

Brazil

Argentina

Colombia

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the global salmon fish market.

Available Customizations:

Global Salmon Fish 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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 - 14.1.2.4. Key Market Focus & Geographical Presence
 - 14.1.2.5. Recent Developments
 - 14.1.2.6. Key Management Personnel
 - 14.1.3. Cermaq Group AS
 - 14.1.3.1. Company Details
 - 14.1.3.2. Product
 - 14.1.3.3. Financials (As Per Availability)
 - 14.1.3.4. Key Market Focus & Geographical Presence
 - 14.1.3.5. Recent Developments
 - 14.1.3.6. Key Management Personnel
 - 14.1.4. Mowi ASA.
 - 14.1.4.1. Company Details
 - 14.1.4.2. Product
 - 14.1.4.3. Financials (As Per Availability)
 - 14.1.4.4. Key Market Focus & Geographical Presence
 - 14.1.4.5. Recent Developments
 - 14.1.4.6. Key Management Personnel

- 14.1.5. P/F Bakkafrost Holding.
 - 14.1.5.1. Company Details
 - 14.1.5.2. Product
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 - 14.1.5.4. Key Market Focus & Geographical Presence
 - 14.1.5.5. Recent Developments
 - 14.1.5.6. Key Management Personnel
- 14.1.6. SEA DELIGHT LLC.
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 - 14.1.6.2. Product
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 - 14.1.6.4. Key Market Focus & Geographical Presence
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 - 14.1.6.6. Key Management Personnel
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 - 14.1.7.4. Key Market Focus & Geographical Presence
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 - 14.1.7.6. Key Management Personnel
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 - 14.1.9.1. Company Details
 - 14.1.9.2. Product
 - 14.1.9.3. Financials (As Per Availability)
 - 14.1.9.4. Key Market Focus & Geographical Presence
 - 14.1.9.5. Recent Developments
 - 14.1.9.6. Key Management Personnel
- 14.1.10. BluGlacier, LLC.
 - 14.1.10.1. Company Details
 - 14.1.10.2. Product
 - 14.1.10.3. Financials (As Per Availability)

14.1.10.4. Key Market Focus & Geographical Presence

14.1.10.5. Recent Developments

14.1.10.6. Key Management Personnel

15. STRATEGIC RECOMMENDATIONS/ACTION PLAN

15.1. Key Focus Areas

15.1.1. Target Species

15.1.2. Target Form

15.1.3. Target Region

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