

Global Salmon Market 2026

Market size, segmentation, competitive landscape and outlook

2021–2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 36.8 bn
Forecast (2031)	USD 49.9 bn
CAGR (2021–2031)	5.2%
Study period	2021–2031
Largest region	Europe · 39%
Fastest-growing region	Asia-Pacific · 6.4%
Market concentration	Moderate
Licence	Individual / Company

The global salmon market reaches USD XXX billion in 2025 and advances to USD XXX billion by 2031, registering a XX% CAGR, according to shev.io Research. Europe accounts for XX% of demand by value, while Asia-Pacific records the fastest regional growth at XX%. Atlantic salmon anchors the category through consistent availability, established processing infrastructure and broad retail distribution. Competitive advantage increasingly depends on biological performance, access to farming capacity and the ability to convert whole fish into convenient products with predictable yields.

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Executive summary

The global salmon market reaches USD XXX billion in 2025 and advances to USD XXX billion by 2031, registering a XX% CAGR, according to shev.io Research. Europe accounts for XX% of demand by value, while Asia-Pacific records the fastest regional growth at XX%. Atlantic salmon anchors the category through consistent availability, established processing infrastructure and broad retail distribution. Competitive advantage increasingly depends on biological performance, access to farming capacity and the ability to convert whole fish into convenient products with predictable yields.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- shev.io Research places global salmon market value at USD XXX billion in 2025 and USD XXX billion in 2031.
- Market revenue grows at a XX% CAGR over 2025–2031, adding USD XXX billion in annual value.
- Europe represents XX% of 2025 market value, equivalent to USD XXX billion.
- Asia-Pacific accounts for XX% of market value and delivers the fastest regional CAGR at XX%.
- Atlantic salmon contributes XX% of market value, supported by year-round farmed supply and standardized processing.
- Farmed salmon represents XX% of market value; wild-caught salmon contributes XX%.
- Fresh and chilled products account for XX% of market value, compared with XX% for frozen products.
- Retail and e-commerce absorb XX% of destination-market wholesale value, making assortment, portion size and price architecture central commercial decisions.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Salmon Market Trends and Growth Drivers

Salmon economics are governed by the interaction of slow biological supply response and rapidly changing customer demand. Farming decisions precede final sale by a substantial production cycle, while retail promotions, freight conditions and foodservice demand can change much faster. This timing difference produces price volatility and rewards businesses with flexible processing, diversified sales markets and disciplined inventory management.

Physical growth is constrained by more than available capital. Environmental permissions, fish health, freshwater infrastructure and suitable marine sites determine how much of the production pipeline becomes saleable harvest. Post-smolt systems and improved monitoring can increase productive output from existing assets, but their value depends on measured biological results.

Demand development increasingly involves product design and route to market. A premium fresh fillet, a frozen portion and smoked salmon compete in different purchase occasions even when they originate from the same species. The report therefore separates species, source, preservation format and customer channel to show where value is created and where commercial exposure accumulates.

Growth drivers

Protein demand and convenient salmon meals

Salmon combines a familiar premium protein proposition with formats that fit quick home preparation. Retailers can extend consumption beyond special occasions through individual portions, oven-ready trays and frozen packs. Suppliers that control portion cost and cooking consistency gain access to more frequent household purchases.

Asian retail and foodservice expansion

Modern grocery, Japanese-style dining and digital food distribution expand the number of places where consumers encounter salmon. China offers substantial room for distribution beyond major coastal cities, while Japan remains an established destination for differentiated Pacific and Atlantic products. The strongest commercial models match species and preservation format to local purchasing power and preparation habits.

Post-smolt investment improves harvest productivity

Larger smolts can shorten exposure to marine production risks and improve the utilization of permitted sea sites. Producers benefit when the added freshwater cost is offset by better survival, faster turnover and more predictable harvest weights. Returns depend on execution across hatchery capacity, fish health and marine operations.

Frozen supply extends market reach

Frozen salmon separates delivery schedules from the narrow selling window of fresh products. This supports distribution into inland cities, smaller retail outlets and foodservice operators with variable

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demand. Processors gain flexibility to place fish across markets when airfreight rates or fresh prices become unfavorable.

Value-added processing raises revenue per fish

Portioning, smoking and ready-to-cook preparation increase the range of consumer occasions served by salmon. Automated cutting and closer specification control help processors recover value from variable fish sizes and quality grades. Growth in market value therefore reflects both physical demand and a shift toward more developed product formats.

Traceable procurement supports premium access

Retail and foodservice buyers increasingly require documented production practices and chain-of-custody information. Producers with consistent environmental reporting and recognized certification can qualify for supply programs that smaller or less documented operators struggle to serve. The commercial benefit comes through customer access, contract continuity and differentiated positioning.

Restraints

Biological losses limit dependable supply

Sea lice, disease, harmful algal blooms and elevated water temperatures interrupt growth and increase mortality. Treatment and handling can also reduce performance, creating a gap between installed capacity and saleable harvest. Producers with concentrated exposure to individual farming regions face particularly uneven costs and delivery schedules.

Licensing and production transitions constrain expansion

Environmental licensing links expansion to local ecological conditions, community acceptance and regulatory decisions. Norway's traffic-light framework and Canada's British Columbia transition illustrate how policy can alter the practical value of marine assets. These constraints raise the importance of productivity improvements within existing permissions.

Feed and input costs pressure margins

Feed connects salmon production costs to agricultural commodities, marine ingredients, energy and currency movements. Alternative ingredients can improve supply resilience but must meet nutritional, technical and commercial requirements. When wholesale prices soften, high feed costs reduce the cash available for biological improvements and expansion.

Affordability limits purchase frequency

Salmon competes with lower-priced proteins in routine household and foodservice purchasing. Higher shelf prices can shift demand toward smaller portions, promotional purchases and frozen formats. Suppliers that rely on premium pricing without clear product differentiation face greater volume sensitivity.

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Salmon Market Growth: Driver and Restraint Impact

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Protein demand and convenient salmon meals	XXX	XXX	XXX
Asian retail and foodservice expansion	XXX	XXX	XXX
Post-smolt investment improves harvest productivity	XXX	XXX	XXX
Frozen supply extends market reach	XXX	XXX	XXX
Value-added processing raises revenue per fish	XXX	XXX	XXX
Traceable procurement supports premium access	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Biological losses limit dependable supply	XXX	XXX	XXX
Licensing and production transitions constrain expansion	XXX	XXX	XXX
Feed and input costs pressure margins	XXX	XXX	XXX
Affordability limits purchase frequency	XXX	XXX	XXX

Source: XXX

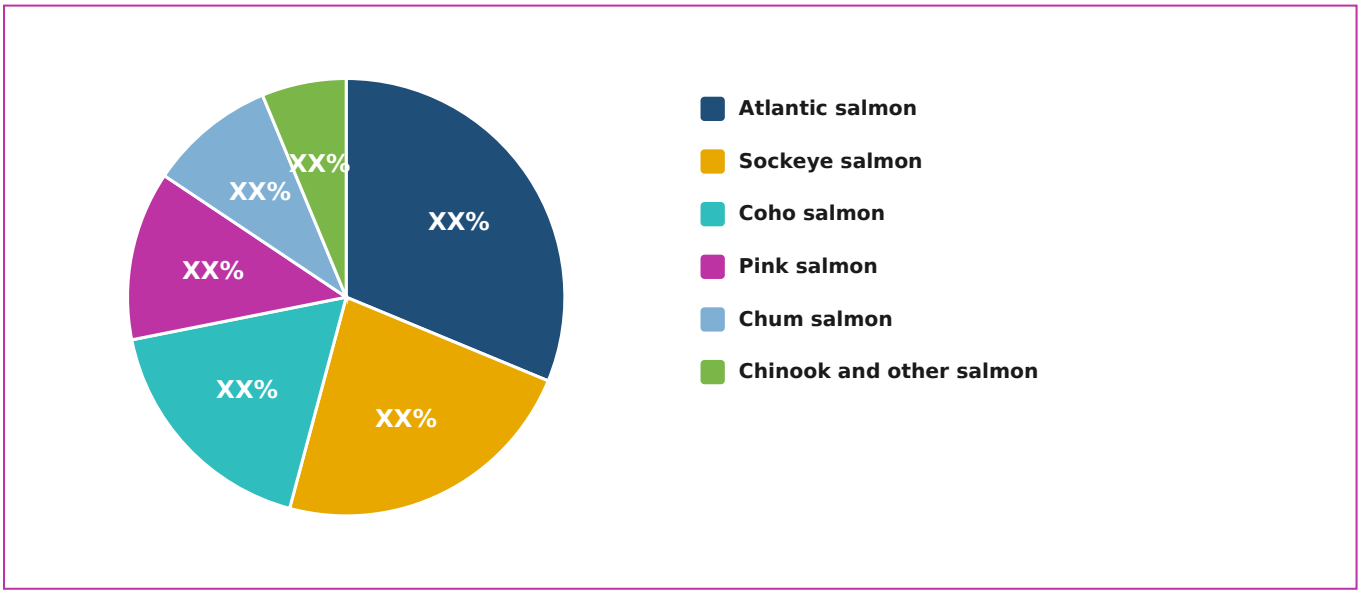
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Salmon Market Segmentation by Species, Source, Product Form and Channel

By Species

Atlantic salmon leads through year-round availability, consistent specifications and established international distribution. Sockeye supports a differentiated wild premium proposition, while coho serves important frozen and foodservice applications. Pink and chum salmon have stronger exposure to processing and preserved products; chinook occupies a smaller premium niche.

Value share by species, 2025



Source: XXX

Value by species, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Atlantic salmon	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sockeye salmon	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Coho salmon	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pink salmon	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Chum salmon	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Chinook and other salmon	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Production Source

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Farmed supply leads because it supports scheduled procurement and relatively consistent size and quality specifications. Wild salmon provides seasonal differentiation and strong provenance narratives, particularly for sockeye. Within farmed production, post-smolt systems and selected land-based operations change production economics without constituting separate species markets.

Value by production Source, USD bn

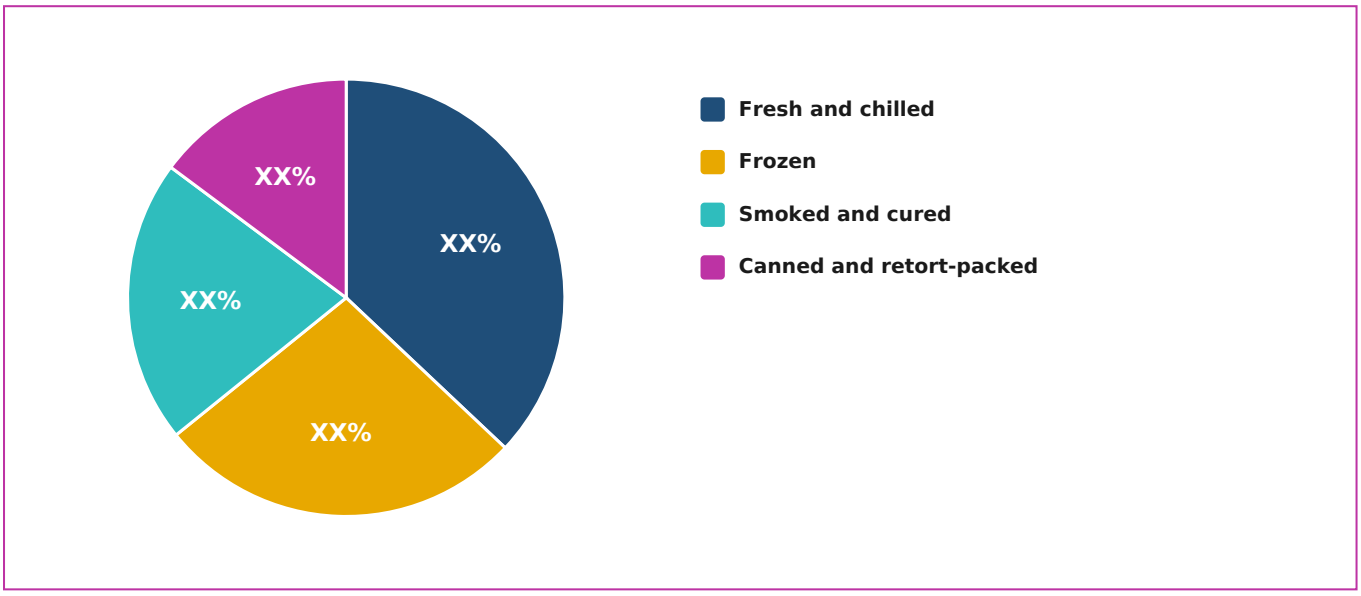
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Farmed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wild-caught	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Product Form

Fresh and chilled salmon anchors supermarket counters, sushi programs and premium foodservice. Frozen products combine distribution flexibility with portion control and support the strongest geographic expansion opportunity. Smoked and canned products address distinct occasions and shelf-life requirements; classification follows the sold product, with smoked and canned salmon excluded from the fresh and frozen categories.

Value share by product Form, 2025



Source: XXX

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Value by product Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Fresh and chilled	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Frozen	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Smoked and cured	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Canned and retort-packed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Retail leads through chilled fillets, frozen portions and preserved products purchased for home consumption. Foodservice combines premium dining with sushi, casual dining and institutional applications, making specifications and service reliability central purchasing criteria. Industrial buyers purchase salmon for composite foods; subsequent sales of those finished foods are excluded from market value.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Retail and e-commerce	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial food manufacturing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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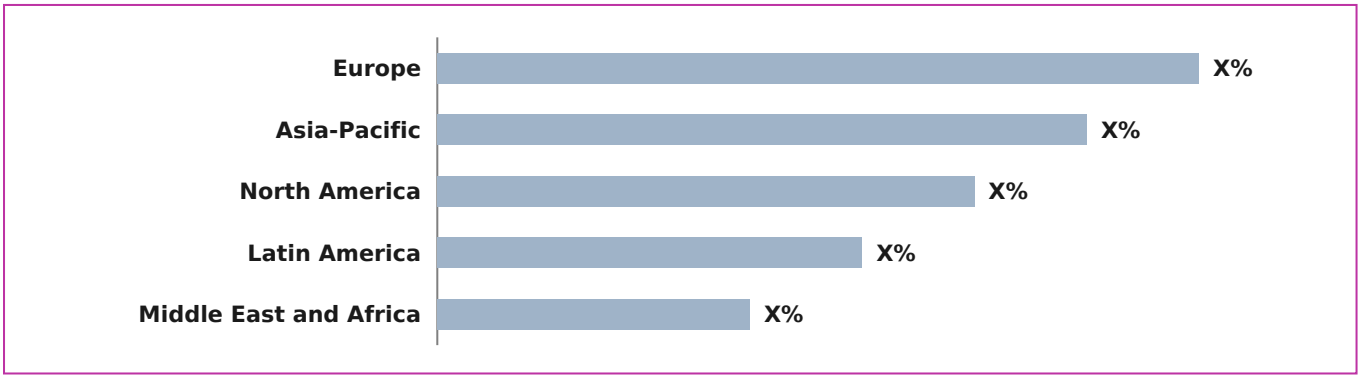
Salmon Market Regional Analysis and Country Outlook

Europe accounts for XX% of global salmon market value in 2025. Its position combines large consumption markets, established smoking and portioning industries, and access to Norwegian, Scottish, Faroese and Icelandic supply. France and Germany are central demand markets, while Norway plays a much larger role in production than its domestic consumption suggests. The report separates destination demand from supply location so that exports and processing flows do not inflate regional market size.

Asia-Pacific grows at XX% annually through 2031, supported by expanding distribution and a diverse product mix. Japan remains a mature market with established demand for Pacific salmon, while China offers growth through modern grocery, foodservice and broader cold-chain coverage. Australia combines domestic Atlantic salmon production with a strong chilled retail market. Frozen formats improve access to inland consumers and reduce dependence on expensive fresh-product logistics.

North America represents XX% of global value, with the United States combining imported farmed Atlantic salmon and domestic wild Pacific supply. Canada's production outlook is shaped by the British Columbia transition, while Chile's commercial importance comes primarily from exports rather than local consumption. Brazil provides a significant regional outlet for Chilean salmon. In the Middle East and Africa, premium hospitality and modern retail support demand, with logistics and affordability determining the breadth of adoption.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Salmon Market Competitive Landscape and Company Share

The global salmon market has moderate concentration, with a more concentrated farmed Atlantic production base and a broader network of processors, importers and wild-capture operators. Mowi, SalMar, Cermaq, Bakkafrost and Lerøy Seafood Group compete through farming assets, biological performance, processing reach and customer relationships. Chilean suppliers including AquaChile, Multi X and Salmones Camanchaca provide alternative geographic exposure and access to both Atlantic and Pacific salmon programs.

Corporate transactions are reshaping access to farming regions and associated infrastructure. Mowi announced an agreement to acquire additional ownership in Nova Sea in January 2025, while Cermaq announced an agreement in July 2025 to acquire Grieg Seafood operations in Finnmark and Canada. The competitive analysis distinguishes announced transactions from completed ownership changes and separates salmon activities from trout, whitefish and distribution businesses.

Scale alone does not determine profitability. Larger post-smolt capacity, lower biological losses, efficient feed conversion and better processing yields can matter more than incremental licensed volume. Land-based entrants such as Salmon Evolution and Atlantic Sapphire add a different production proposition, but their economics depend on stable biological operation, realized selling prices and disciplined capital deployment.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Mowi	XXX	XXX	XXX	XXX
SalMar	XXX	XXX	XXX	XXX
Cermaq	XXX	XXX	XXX	XXX
Lerøy Seafood Group	XXX	XXX	XXX	XXX
Bakkafrost	XXX	XXX	XXX	XXX
Grieg Seafood	XXX	XXX	XXX	XXX
AquaChile	XXX	XXX	XXX	XXX
Multi X	XXX	XXX	XXX	XXX
Salmones Camanchaca	XXX	XXX	XXX	XXX

Source: XXX

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Salmon Market Forecast and Investment Opportunities

Global salmon market value reaches USD XXX billion by 2031. The central commercial trend is a shift from undifferentiated whole-fish trading toward more specific customer programs built around portions, shelf life, traceability and delivery reliability. Fresh and chilled salmon retains the largest product position, while frozen formats broaden distribution and support more flexible purchasing.

The upside case depends on improved biological performance, successful post-smolt deployment and stronger Asian consumption. The downside case combines production interruptions with weaker consumer purchasing power and higher input costs. Scenario analysis separates harvest volume, wholesale pricing, product mix and currency effects so that buyers can identify which assumptions matter to their own exposure.

Winning strategies combine dependable supply with a clear destination-market proposition. Producers benefit from selective processing integration and customer contracts that recognize service and product quality. Investors should distinguish projects that improve the productivity of an established production system from projects that still need to demonstrate consistent technical and commercial performance.

Opportunities

- Retail-ready frozen portions for inland Asian cities
- Post-smolt production supporting shorter marine grow-out cycles
- Premium wild salmon with harvest-area and chain-of-custody differentiation
- Automated portioning and yield optimization for processors
- Convenience products designed for smaller households
- Traceable supply contracts for institutional and branded foodservice buyers
- Selective land-based production near high-value consumption centers

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