

United States Frozen and Canned Seafood - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The United States Frozen and Canned Seafood Market size is estimated at 18.6 billion USD in 2025, and is expected to reach 19.86 billion USD by 2030, growing at a CAGR of 1.33% during the forecast period (2025-2030).

The rising demand for convenience foods is driving the market growth

- The frozen/canned fish segment dominated the market with an increase in the Y-o-Y growth rate of 8.64% from 2020 to 2022. The primary factors influencing the market for frozen fish in the United States are the rising demand for convenience meals like ready-to-eat and ready-to-cook foods and the increasing consumer awareness about health issues. These products shorten the cooking time for those with busy schedules and stressful lifestyles. Fresh, chilled, and live seafood became more difficult to obtain. Consumer preferences resulted in a shift that favored shelf-stable seafood products, such as canned and frozen items. Frozen seafood sales reportedly increased by 7.36% in 2022 from the pandemic.
- Frozen shrimp is the fastest-growing segment of the frozen/canned seafood market in the United States, which is expected to register a CAGR value of 1.54% during the forecast period. The sales of frozen shrimp in the United States also increased by 2.17% in 2022 compared to 2021. The US dietary guidelines recommend eating at least 8 ounces of seafood per week, of which consumption of frozen/canned shrimp products was one of the major sources of dietary seafood protein. Also, the prices of frozen shrimp are at a constant level compared to other seafood.
- In 2021, the increase in the sales of frozen fish across the United States was attributed to the added advantage of long shelf life and year-round availability across various market channels, with increased consumer health awareness fueled by frozen seafood sales volume and value. An average American consumed less than 3.5 pounds of canned fish in 2022. In 2022, consumer spending on frozen seafood in the United States accounted for USD 8 billion, while shrimp represented 48% of the category's

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sales.

United States Frozen and Canned Seafood Market Trends

Overfishing, high cost of fuel, and labor shortages had a negative impact on the production of captured fish

- Based on value, bivalve mollusks, including oysters, clams, and mussels, make up more than 80% of marine aquaculture production in the United States in 2022. Fish is the largest sector of aquaculture in the United States, which accounted for 66% of the market in 2022, followed by crustaceans and mollusks. The most popular types of fish farmed internationally are salmon, shrimp, trout, and sea bass, but new developments in technology, aquaculture feeds, and management strategies are making other species available. By weight, marine aquaculture makes up 7% of all domestic seafood production. However, because of the emphasis on high-value items, aquaculture now accounts for 24% of the value of domestic seafood.
- Overfishing, high fuel costs, and labor shortages have negatively impacted the production of captured fish, with fish production decreasing by 15% in 2022. Additionally, illegal fishing by foreign nationals has also impacted fish output. However, the overall drop in the actual value of fisheries production has been tempered by growth in the real value of aquaculture.
- In order to support producers and encourage fish production in the country, government assistance has come into play to aid the market's growth and development over the years. By assisting them through laws and investments, the US government has demonstrated its determination to encourage local and independent seafood producers. For instance, in February 2022, the US Department of Agriculture (USDA) invested approximately USD 50 million in grants to support seafood processors, processing facilities, and processing vessels through the Seafood Processors Pandemic Response and Safety Block Grant Program (SBRS).

Disruption in supply chain increased the price fluctuations

- Fish prices in the country witnessed standard growth in the review period and registered an average growth of 30.6% from 2017 to 2022. It is estimated that demand will outpace supply moving forward. Fish prices followed an upward trend in recent years due to limitations on supply growth, particularly for capturing fisheries, and continued registering strong demand. For fish products sold with weight information, the prices increased by more than 2.2% in 2021 and another 5% in 2022. For products sold without weight information, the trend in prices and percentage change in price was similar, but with lower average prices and a wider range of growth rate values. However, in 2021, international fish prices were, on average, just 6-8% higher than the previous year. This was primarily due to price declines for many important farmed species, including shrimp, salmon, pangasius, catfish, tilapia, and canned tuna, as a consequence of supply outpacing demand.
- On the supply side, stable production of capture fisheries, slowing growth in aquaculture production, and increased costs for inputs such as feed, energy, and oil are expected to play a role in the segment. Due to strong global demand, the prices of fishmeal and fish oil are expected to increase by 30% and 13%, respectively, by 2030.
- In 2022, the United States was one of the largest fish-importing markets, following the European Union, and accounted for an import value of around 18%. Urbanization and expansion of the fish-consuming middle class have fueled demand and growth in the country. The US seafood imports destined for retail support the largest share of the total economic contributions, which was USD 26 billion in industry output (37.0%) and USD 15 billion in value-added (39.7%) in 2022.

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United States Frozen and Canned Seafood Industry Overview

The United States Frozen and Canned Seafood Market is fragmented, with the top five companies occupying 17.27%. The major players in this market are High Liner Foods Inc., Mowi ASA, Sysco Corporation, Thai Union Group PCL and Trident Seafood Corporation (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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