

# Fish Sauce Market Size to Reach \$9.3 Billion by 2032: Viet Phu, Rayong Fish Sauce, Teo Tak Seng Fish Sauce

*The fish sauce market size was valued at \$5.9 billion in 2022, and is estimated to reach \$9.3 billion by 2032, growing at a CAGR of 4.6% from 2023 to 2032.*

WILMINGTON, DE, UNITED STATES, February 12, 2025 /EINPresswire.com/ -- As culinary boundaries blur and fusion cuisine gains popularity, chefs and home cooks are experimenting with combining flavors from different cuisines. Fish sauce's unique umami-rich profile makes it a versatile ingredient that can enhance a wide range of dishes, both traditional and modern, contributing to its growing demand in diverse culinary creations.

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Small fish with salt undergo a transformative journey through fermentation, yielding a liquid teeming with savory notes. Evolving from its roots in Southeast Asia and East Asia, this culinary gem has found a global stage. From bustling street food stalls to gourmet kitchens, its bold flavor profile harmonizes with diverse dishes, making it an indispensable part of culinary innovation.

The fifth fundamental taste, umami, is celebrated for its savory, rich, and intricate essence that elevates the overall flavor of any dish. With its distinct umami goodness, fish sauce has evolved into a coveted condiment and flavor enhancer in the global culinary scene. As culinary explorers, food aficionados, and chefs seek out novel taste experiences, they find themselves irresistibly drawn to the fish sauce for its ability to enhance the delectable appeal of their creations. The one-of-a-kind umami profile of fish sauce has seamlessly integrated into diverse recipes, igniting a surge in market demand, thanks to its role as a key ingredient that bestows depth and character upon a wide array of dishes.

The [fish sauce market](#) demand is propelled by the powerful interplay of cultural and culinary traditions. Across various Asian countries, fish sauce holds a deep-rooted cultural significance and remains an essential component of traditional dishes. As the popularity of these Asian cuisines spreads across the globe, there is a surge in admiration for genuine flavors and authentic ingredients, with fish sauce taking the spotlight. With the new fish sauce market trends, consumers are increasingly adopting new cross-cuisine cultures in developing countries. The longstanding practice of using fish sauce in regional recipes sparks a sense of authenticity and

intrigue among consumers, inspiring them to delve into this vital condiment for their culinary ventures. Moreover, with people from diverse backgrounds embracing Asian cuisine, the demand for fish sauce continues to surge, firmly establishing it as a must-have staple in households and restaurants worldwide.

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The fish sauce market experienced a significant surge through premiumization and the rise of artisanal products. As consumers increasingly seek one-of-a-kind and authentic culinary experiences, they are eager to invest in high-quality fish sauces meticulously crafted by artisans. These artisanal offerings, carefully sourced from select fish and crafted using traditional methods, boast unique flavors and unmatched quality compared to mass-produced alternatives. Catering to the evolving tastes of discerning consumers, premium fish sauces transcend their traditional role as condiments and ascend as gourmet ingredients. The rising adoption of fish sauce in different region is expected to create fish sauce market opportunities. Moreover, the perceived health benefits associated with natural and traditional ingredients further amplify the allure of premium fish sauces. By embracing this growing trend, fish sauce producers attract a dedicated customer base and drive substantial fish sauce market growth.

The fish sauce market faces challenges from competing with alternative condiments, as consumers have a plethora of choices for enhancing flavors. With condiments such as soy sauce, oyster sauce, and various regional sauces offering diverse taste profiles, there is something to cater to every palate. Moreover, the allure of fusion sauces that creatively blend flavors further expands the array of options available. As a result, the demand for fish sauce is no longer exclusive, impacting its market penetration and growth. To overcome this hurdle, fish sauce producers accentuate the unique characteristics of their products, venture into innovative flavor combinations, and target specific consumer segments seeking the authentic taste and culinary heritage associated with fish sauce. By celebrating its distinctiveness and appeal to discerning taste enthusiasts, fish sauce has carved out its special place amidst the diverse condiment landscape, thriving and captivating taste buds worldwide.

The fish sauce market is segmented into type, application, distribution channel, and region. By type, the market is divided into Korean fish sauce, Japanese fish sauce, Southeast Asian fish sauce, and others. By application, the market is classified into food & beverages, household, hotels & restaurants, and others. By distribution channel, the market is categorized into hypermarkets & supermarkets, specialty stores, online retail, and others. Region-wise, the market is analyzed across North America (the U.S., Canada, and Mexico), Europe (Germany, France, Italy, Spain, the UK, Russia, and the rest of Europe), Asia-Pacific (China, Japan, India, South Korea, Australia, Thailand, Malaysia, Indonesia, and rest of Asia-Pacific), and LAMEA (Brazil, South Africa, Saudi Arabia, UAE, Argentina, and rest of LAMEA).

By type, the Southeast Asian fish sauce segment accounted for more than 50%% of the fish

sauce market share, in terms of revenue, in 2022. Southeast Asian fish sauce is a pungent, savory, and umami-rich condiment commonly used in the cuisines of Southeast Asia. It is made by fermenting fish, usually anchovies or other small fish, with salt. The process involves placing the fish in large barrels or containers and layering them with salt. It is widely used in countries such as Thailand, Vietnam, Cambodia, Laos, and Myanmar.

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By application, the hotels & restaurants segment led the market and accounted for more than 20% of the global fish sauce market in 2022 and is expected to maintain its dominance during the forecast period. Chefs get creative by incorporating fish sauce into traditional glazes, dressings, or marinades, adding a new layer of complexity and depth to familiar flavors. This innovative use of fish sauce enhances the overall dining experience and delights diners with exciting twists in their favorite dishes.

By distribution channel, the hypermarkets and supermarkets segment led the market and accounted for more than 58.4% of the global fish sauce market in 2022 and is expected to maintain its dominance during the forecast period. The proliferation of new hypermarkets and supermarkets in the suburbs has given consumers the ability to select the sort of fish sauce that best suits their needs. Moreover, the one-stop solution provided by these retail formats makes it an extremely popular option for shopping for consumers. These retail formats offer a wide range of products at a competitive price to customers and are usually located in easily accessible areas.

Region-wise, Asia-Pacific was the largest market in 2022 and had the highest market share of 39.5%. The expansion of food retail outlets and the rise of e-commerce platforms have made fish sauce more accessible to consumers in the region. Increased availability has contributed to higher consumption.

Some of the key players profiled in the fish sauce market analysis include Rungroj Fish Sauce Co., Ltd., Viet Phu, Inc., Rayong Fish Sauce Industry Co., Ltd., Teo Tak Seng Fish Sauce Factory Co., Ltd., Pichai Fish Sauce Co. Ltd., Tang Sang Ha Company Limited, Thai Fish Sauce Factory (Squid Brand) Co., Ltd., Marine Resources Development Co., Ltd., Halcyon Proteins Pty. Ltd., and Thai Preeda Trading Co., Ltd.

#### Key findings of the study

By nature, the premium segment is projected to witness the highest CAGR of 5.3%, in revenue terms, during the forecast period.

By type, the Japanese fish sauce segment is projected to witness the highest CAGR of 5.4%, in revenue terms, during the forecast period.

By application, the household segment is expected to grow at a significant CAGR during the forecast period.

By distribution channel, the online retail segment is projected to witness the highest CAGR of 5.2%, in revenue terms, during the forecast period.

By region, LAMEA is anticipated to witness the highest growth rate, registering a CAGR of 5.2% from 2023 to 2032.

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