Cell-Cultivated Seafood Products

ANMD-MRS13-130 · Sustainable Food & Alternative Protein Technologies

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US$

WHY THIS REPORT

Cell-cultivated seafood products grow fish and shellfish from cells — the cultivated finfish, shellfish, salmon and tuna, hybrid products and bioprocess platforms that produce seafood without wild catch or aquaculture. Positioned against overfishing, contamination and supply pressure, cultivated seafood targets premium species and supply-resilient, contaminant-free production. This decision-grade study sizes the global market three ways — value, volume (tonnes/kg) and products/SKUs — across product type, value-chain stage and channel, across seven regions and four scenarios to 2032, with outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Cultivated seafood promises real seafood without overfishing, bycatch, microplastic or contaminant exposure.

Mapped Sustainable Development Goals:

SDG 2	SDG 3	SDG 12	SDG 13	SDG 15
Zero Hunger	Good Health & Well-being	Responsible Consumption & Production	Climate Action	Life on Land

Measurable sustainability outcomes assessed:

- Seafood without overfishing, bycatch or wild-catch pressure
- Contaminant-free, traceable, supply-resilient production
- Bioprocessing energy and its emissions dependence as a material risk
- LCA substantiation and regulatory pathways assessed

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

53 Chapters	**9** Report Parts	**7** Regions Covered	**40+** Country Markets
2025–32 Forecast Horizon	**4** Forward Scenarios	**25+** Companies Profiled	**5** SDGs Mapped

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. North America leads pipeline and approvals; Asia Pacific and Israel drive innovation; Europe builds capability; other regions assessed on their own merits.

- Real seafood grown from cells without wild catch or aquaculture
- Premium tuna, salmon and shellfish offer first commercial headroom
- Cell-line, media, bioprocess and end-product value chain
- Bioprocess energy, LCA and regulatory pathways as material risks

MARKET OVERVIEW

From wild catch to cultivated cell — where contaminant-free, supply-resilient seafood targets premium species first.

Cultivated seafood is an emerging, premium-focused field. Demand is driven by overfishing and supply pressure, contaminant-free and traceable production, and high-value species across North America, Asia Pacific and Israel. The market is read three ways — value, volume and products/SKUs — and forecast under four scenarios, each region reported separately.

- **North America leads pipeline and approvals** — United States, anchored by BlueNalu, Inc., Wildtype, Inc. and Finless Foods Inc. across finfish and shellfish
- **Asia Pacific and Israel drive innovation** — Singapore, Hong Kong, South Korea and Israel, with Umami Bioworks, Avant Meats, Forsea Foods Ltd. and CellMEAT
- **High-value species are the differentiator** — premium tuna, salmon and shellfish offer the price headroom to reach commercial viability first
- **Value-chain stage segments the value** — cell lines & media, bioprocess/scale-up and end product, each with distinct economics and risk

REGIONAL OUTLOOK

Across seven reporting regions, the report separates leading markets from high-growth and emerging ones — each profiled in full rather than aggregated into Rest of World.

Region	Stage	Lead Country Markets & Drivers
North America	Pipeline & approval leader	United States — BlueNalu, Wildtype, Finless Foods
Asia Pacific	Innovation hub	Singapore, Hong Kong, South Korea — Umami, Avant, CellMEAT
Europe	Building capability	Germany — Bluu Seafood, cultivated finfish
Middle East	Innovation hub	Israel — Forsea Foods cultivated seafood
Latin America	Frontier	Brazil — early interest
Africa	Frontier	South Africa — research activity

KEY MARKET DRIVERS & RESTRAINTS

Drivers	Restraints
• Overfishing & seafood supply pressure • Contaminant-free, traceable production • High-value premium-species economics • Climate & ocean-health imperatives • Supply-resilient sourcing	• Cost-of-goods & bioprocess scale • Regulatory-approval pathways • Fish-specific cell-line development • Media-cost reduction • Consumer acceptance

SEGMENTATION SNAPSHOT

By Product Type	Cultivated finfish · cultivated shellfish & crustacean · cultivated salmon & tuna · hybrid seafood · scaffold & bioprocess
By Value-Chain Stage	Cell lines & media · bioprocess / scale-up · end product
By Stage	Approved · pilot · pre-commercial
By End User	Food brands · manufacturers · retail · foodservice
By Business Model	Branded products · ingredient supply · licensing
By Channel	Retail / CPG · foodservice · ingredient / B2B

TECHNOLOGY & APPLICATION FINDINGS

Where the category is differentiating fastest — the technology and application fronts that separate leaders from followers:

- **Premium species** — cultivated tuna, salmon and shellfish target the highest-value, supply-constrained markets
- **Cell lines & media** — fish-specific lines and low-cost media are the core cost and development levers
- **Hybrid & scaffolding** — plant-cultivated hybrids and scaffolds bridge cost and deliver structure

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field is a pre-commercial cohort of cultivated-seafood pioneers. Deal activity — regulatory milestones, pilot-facility build-out and species-platform partnerships — signals a field racing toward cost-down and premium-species launch.

Representative players profiled in the full report:

BlueNalu, Inc. · Wildtype, Inc. · Avant Meats · Umami Bioworks · Finless Foods Inc. · Forsea Foods Ltd. · Bluu Seafood GmbH · and 20+ further profiled players.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a conditional investment view.

KEY QUESTIONS THIS REPORT ANSWERS

- How large is the global cell-cultivated seafood market, and how fast will it grow to 2032?
- Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- Which technologies and sources reshape the addressable market and the cost curve?
- Who leads, and where is the competitive and patent white space?
- Is the investment case bankable — and under what conditions?
- How does the category align with the SDGs, nutrition, food security and disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, nutrition, climate, water and natural-capital intelligence and a decision-ready bankability view in a single architecture.

- **Triangulated sizing** — every market read three ways so value, volume (tonnes/kg) and the products/SKUs view reconcile rather than conflict.
- **Region-honest forecasting** — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- **Integrated evidence base** — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- **No-fabrication discipline** — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- **Anti-greenwashing rigour** — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- **Decision-first structure** — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear, conditional investment view.

WHO SHOULD BUY THIS REPORT

Investors, seafood and food companies, manufacturers, retailers, foodservice and policymakers, and strategic corporate planners and decision-makers.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at **www.anewmarketdynamics.com** · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at **www.anewmarketdynamics.com**. The full detailed table of contents will be sent directly to your registered company email address.