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Report Name: Norway Fish Feed Ingredient Market - Fish Feed Producers and Feed Composition and Ingredient Use

Country: Norway

Post: The Hague

Report Category: Fishery Products, Oilseeds and Products, Grain and Feed, Livestock and Products, Poultry and Products

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Report Highlights:

Norway's fish feed ingredient market represents more than \$3 billion in feed ingredients, with approximately 2.47 million metric ton (MT) of feed ingredients used for salmonid production in 2025 and four major fish feed producers supplying the vast majority of that production. Norwegian fish feed producers continue to diversify their feed formulations to optimize cost, nutrition, sustainability, and supply security. This report provides an overview of the Norway's fish feed producers, developments in fish feed composition, and ingredient use. U.S. parties interested in additional information are encouraged to contact FAS The Hague.

1. Introduction

This report is a supplement to the GAIN report [NO2025-0001 The Norwegian Fish Feed Ingredient Market](#), which provides an overview of market size, ingredients, trade flows, and import requirements of Norwegian fish feed ingredients.

The Norwegian fish feed market is highly concentrated, with four major fish feed producers supplying most of the market. Norway is actively promoting the development of more sustainable and domestically produced feed ingredients, while imported ingredients are expected to remain an important part of future feed production. At the same time, Norwegian fish feed producers continue to diversify their feed formulations to optimize cost, nutrition, sustainability, and supply security, creating trade opportunities for suppliers able to meet these needs.

2. Overview of the Norwegian Fish Feed Industry

In 2025, Norway's fish-farming industry used 2.33 million MT of fish feed^{1 2}, while sales of slaughtered farmed fish totaled approximately 1.88 million MT (Norwegian Directorate of Fisheries).³ Atlantic salmon accounted for approximately 93 percent of sales of slaughtered farmed fish by volume in 2025.⁴ Fish feed for Norwegian aquaculture is primarily supplied by four major fish feed producers: [Cargill](#) (EWOS®),⁵ [Skretting](#), [BioMar](#), and [Mowi](#). A number of smaller fish feed producers also operate in the market. Most serve specialized feed segments, including starter feeds (e.g., [Trofi](#)), live feeds (e.g., [CFEED](#)), and larval feeds (e.g., [Molofeed](#)). Some operate on a smaller scale across feed segments (e.g., [Polarfeed](#) and [Aller Aqua](#)). In addition, companies may support ingredient suppliers by documenting, testing, and validating new feed ingredients and facilitating their introduction to the aquaculture feed industry (e.g., [Arctic Feed](#)).

The market therefore has a concentrated structure. Cargill, Skretting, and BioMar supply the wider aquaculture sector, while Mowi is vertically integrated and operates its own feed division, which supplied 95 percent of the feed requirements of Mowi's European salmon-farming operations in 2025.⁶ Moreover, Mowi entered into a strategic partnership with Skretting/Nutreco in 2025.⁷ Under the partnership, Mowi retained its feed division and production facilities, while production is now based on Skretting's feed formulations. The major fish feed producers generally source fish feed ingredients

¹ https://www.fiskeridir.no/english/aquaculture/statistics-for-aquaculture/booklets/_/attachment/inline/890c957c-fbef-4a3e-8a7e-d4301089d599%3Ace284c1041b73547e4e7e0bb90e1537b19ccfe91/nokkeltall-havbruk-2025-eng.pdf

² Of which 2.25 million MT feed for salmonids and rainbow trout, <https://www.fiskeridir.no/statistikk-tall-og-analyse/data-og-statistikk-om-akvakultur/biomassestatistikk-etter-produksjonsomrade>

³ <https://www.fiskeridir.no/english/aquaculture/statistics-for-aquaculture/comprehensive-statistics-on-norwegian-aquaculture>

⁴ Calculation based on https://www.fiskeridir.no/english/aquaculture/statistics-for-aquaculture/booklets/_/attachment/inline/890c957c-fbef-4a3e-8a7e-d4301089d599%3Ace284c1041b73547e4e7e0bb90e1537b19ccfe91/nokkeltall-havbruk-2025-eng.pdf

⁵ See also <https://www.ewos.com/no/>.

⁶ <https://mowi.com/wp-content/uploads/2025/05/Mowi-Annual-Report-2025.pdf>

⁷ <https://mowi.com/general/mowi-enters-into-strategic-feed-partnership-with-skretting-nutreco/>

directly from suppliers. Consequently, fish feed ingredient purchasing decisions are concentrated among a limited number of large companies.

3. Feed Composition and Ingredient Trends

For its feed, Norwegian aquaculture has shifted substantially from marine to plant-based ingredients over the past two decades. The limited availability of fishmeal and fish oil has been an important driver of this transition. As a result, plant-based ingredients now constitute the largest share of Norwegian fish feed formulations, supplemented by marine ingredients and micro-ingredients (Table 1). For a more detailed overview of fish feed ingredients and their trade flows, see GAIN report [NO2025-0001 The Norwegian Fish Feed Ingredient Market](#).

This shift also reflects the need for fish feed formulations to adapt to changing ingredient prices and availability. Norway's dependence on imported agricultural and marine ingredients increases exposure to commodity markets, exchange rates, freight costs, and supply disruptions. This creates a constant need for flexible sourcing and gives suppliers an opportunity to offer reliable, competitive, or functionally useful alternatives.⁸

Feed producers are therefore also increasingly using alternative ingredients in small but commercial quantities. Examples include microalgae oil (e.g., [Veramaris](#), [BioMar](#)), camelina oil (used, for example, by [Kvarøy Arctic](#)), krill-derived ingredients (e.g., [QRILL Aqua](#)), *Calanus finmarchicus* (e.g., [Zooca](#)), insect meal (e.g., [Protix](#)), and selected animal by-products, including poultry meal.⁹ Other emerging ingredients being researched, evaluated, or used at limited scale include kelp-based ingredients,¹⁰ single-cell proteins (e.g., [Enifer in collaboration with Skretting](#)), and fermentation-derived ingredients. The organic feed market is still small (e.g., [EWOS organic](#)).

Table 1. Feed Composition of Norwegian Salmon Feed, according to [Nofima](#) (2020)

Ingredient source	Share*	Main examples
Plant-based ingredients	74%	
• Plant protein	41%	Soy protein concentrate
• Vegetable oils	20%	Rapeseed oil
• Carbohydrate sources	13%	Wheat
Marine ingredients	22%	
• Marine protein	12%	Fishmeal
• Marine oils	10%	Fish oil

⁸ <https://pub.norden.org/nordicinnovation2025-05/5-marine-aquaculture-in-the-nordics.html>

⁹ <https://weareaquaculture.com/news/feed/ler%C3%B8y-along-with-ewos-cargill-to-introduce-chicken-by-products-in-fish-feed>

¹⁰ <https://www.nibio.no/en/news/fish-feed-with-seaweed>

Ingredient source	Share*	Main examples
Micro-ingredients	4%	Vitamins, minerals, amino acids
Other ingredients	0.4%	Insect meal, single-cell proteins, microalgae, fermented products

* The ingredient shares are rounded to whole percentages.

More Information

U.S. parties interested in additional information about the Norwegian fish feed market, identifying potential trade opportunities, or discussing the findings of this report are can contact FAS The Hague.

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Digital meetings may also be arranged upon request.

Attachments:

No Attachments.