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Seafood leads global protein production growth: Rabobank Global Animal Protein Outlook 2025

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In 2025, economic conditions, geopolitics, and supply availability will significantly influence global animal protein markets, according to RaboResearchâ??s Global Animal Protein Outlook. While demand remains vulnerable to macroeconomic fluctuations and policy changes, seafood is poised to surpass poultry as the leading contributor to global protein supply growth.

Report lead author, RaboResearch senior protein analyst Angus Gidley-Baird said government policy and macroeconomics will shape demand and access to supply.

â??As the global economy strives for recovery, anticipated policy shifts from new governments could introduce protectionist measures, leading to tariffs and higher trade costs,â?• he said. â??Military conflicts may further disrupt shipping and freight, impacting global trade and increasing market volatility. Although inflationary pressures have been easing, policy decisions could reverse this trend, potentially weakening consumer demand if incomes do not rise accordingly.â?•

Gidley-Baird said production in many regions and species will reach a turning point, with aquaculture and wild catch leading growth.

â??The year 2025 marks a pivotal moment for production across various regions and commodities. Overall production is set to grow slightly faster than in 2024, driven by aquaculture, wild catch, and poultry,â?• he said. â??Seafood and pork are expected to transition from contraction to growth, while beef will move from growth to contraction, reshaping market dynamics and supply chains.â?•

The Rabobank report said aquaculture and wild catch are projected to grow by 2.3 per cent year-on-year, rebounding from a 0.3 per cent decline in 2024. Poultry will continue its steady growth, while beef production will decline due to contractions in major regions. Pork production will be up marginally (0.1 per cent) after significant growth from 2021 to 2023 following recovery from African swine fever.

Gidley-Baird noted growth in terrestrial species production will decelerate in most regions, with Brazil experiencing a one per cent contraction. â??China will see a small increase after negative growth in 2024. Oceania will maintain steady production, while the EU27+UK, North America, and Southeast Asia will face slower growth than 2024.â?•