

Land-Based Seafood Farming Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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Abstracts

Land-Based Seafood Farming Market Summary

Introduction

Land-based seafood farming involves the cultivation of aquatic species, such as salmon, trout, and shrimp, in controlled, terrestrial facilities using recirculating aquaculture systems (RAS) or flow-through setups. This industry is characterized by its sustainability, reduced environmental impact, and ability to produce high-quality seafood independent of coastal access. Available in seawater and freshwater variants, it serves food service and retail applications, emphasizing biosecurity, traceability, and proximity to consumer markets. The market reflects a shift toward innovative aquaculture solutions, driven by declining wild fish stocks, growing seafood demand, and advancements in water treatment technologies. Key growth factors include consumer preference for sustainable proteins, regulatory support for eco-friendly farming, and the scalability of RAS systems.

Market Size and Growth Forecast

The global land-based seafood farming market is estimated to reach USD 3.2 to 5.4 billion in 2025, with a projected compound annual growth rate (CAGR) of 6.0% to 7.0% from 2025 to 2030. This growth is fueled by expanding aquaculture adoption and technological advancements in farming systems.

Regional Analysis

North America: Holds 25-30% market share, with a growth rate of 5-6%. Growth is driven by premium seafood demand, with the United States leading in salmon and

shrimp production and Canada focusing on sustainable RAS facilities.

Europe: Accounts for 30-35% market share, with a growth rate of 6-7%. Demand from Norway and Denmark supports dominance, driven by strong aquaculture innovation and export markets.

Asia Pacific: Represents 20-25% market share, with a growth rate of 7-8%. China and Japan drive growth with increasing inland farming and government-backed sustainability initiatives.

Rest of the World: Holds 10-15% market share, growing at 6-7%, with Chile leading due to its focus on freshwater species and export potential.

Trends in Europe emphasize technological sophistication, while Asia Pacific prioritizes scalability and cost efficiency to meet rising domestic demand.

Application Analysis

Food service grows at 6-7%, driven by restaurant and hospitality demand, with trends toward fresh, locally farmed seafood in premium dining. Retail grows at 5-6%, fueled by consumer purchases, with trends toward packaged, traceable products in supermarkets and specialty stores.

Product Type Analysis

Seawater seafood farming grows at 6-7%, favored for replicating marine conditions in RAS, with trends toward salmon and high-value species for export markets. Freshwater seafood farming grows at 5-6%, driven by accessibility and species like trout and tilapia, with trends toward inland expansion and lower operational costs.

Key Market Players

Pure Salmon: A global leader in RAS-based salmon farming, Pure Salmon focuses on sustainable, high-quality production. Known for its advanced facilities, it serves food service and retail with premium seafood near urban centers.

Atlantic Sapphire: Atlantic Sapphire specializes in land-based salmon farming using seawater RAS. Renowned for its eco-friendly, large-scale operations, it targets North American and European retail markets with traceable products.

Balmoral Tanks: Balmoral Tanks provides infrastructure solutions for land-based aquaculture. It excels in durable, customizable tank systems, supporting both freshwater and seawater farming globally.

Matorka: Matorka focuses on Arctic char and salmon farming in Iceland. Known for its sustainable, geothermal-powered RAS, it serves food service with high-quality, niche seafood.

Kuterra Limited: Kuterra Limited pioneers land-based salmon farming in Canada. It stands out for its biosecure, community-supported model, targeting retail and food

service with premium offerings.

Danish Salmon: Danish Salmon produces salmon using advanced RAS technology. Renowned for its efficient, sustainable practices, it serves European food service and retail markets with consistent quality.

Superior Fresh: Superior Fresh combines aquaponics with salmon and leafy greens farming. Known for its innovative, eco-conscious approach, it targets U.S. retail with fresh, organic seafood.

AquaBounty: AquaBounty focuses on genetically engineered salmon in land-based systems. It excels in fast-growing, sustainable production, serving food service and retail with a unique market edge.

AKVA Group: AKVA Group supplies technology and equipment for land-based farming. Renowned for its comprehensive RAS solutions, it supports global producers with scalable systems.

Innovasea: Innovasea offers advanced aquaculture technologies for land-based setups. Known for its precision monitoring tools, it serves both seawater and freshwater farming with cutting-edge innovations.

Aquabanq: Aquabanq develops large-scale RAS facilities for salmon. It focuses on high-output, sustainable farming, targeting food service and retail with premium seafood.

AquaBioTech: AquaBioTech provides consulting and RAS solutions for seafood farming. It excels in customized, efficient systems, supporting producers worldwide with technical expertise.

Afry: Afry delivers engineering and design services for land-based aquaculture. Known for its sustainable infrastructure, it supports both freshwater and seawater operations globally.

Morefish: Morefish focuses on freshwater species like trout in RAS systems. It stands out for its cost-effective, scalable solutions, targeting Asia Pacific retail markets.

These companies compete on sustainability, technology, and quality, driving the market through innovation and strategic expansions.

Porter's Five Forces Analysis

The threat of new entrants is moderate, requiring significant capital for RAS setups and technical expertise, though smaller players can emerge with niche species. Substitutes are low, with wild-caught seafood declining and unable to match land-based scalability. Buyer power is medium, with food service and retail chains negotiating prices, but growing demand for sustainable seafood limits leverage. Supplier power is moderate, with reliance on specialized equipment like pumps and filters balanced by multiple providers. Rivalry is high, with players differentiating through technology, species variety, and certifications, fostering continuous advancements.

Tariff Conflict and Supply Chain Localization Trend

Tariff conflicts increase costs for imported RAS equipment and processed seafood, encouraging localized production in North America and Europe. In the United States and Canada, localization supports domestic demand and reduces reliance on foreign tech, though higher setup costs challenge profitability. In Europe, regional supply chains align with sustainability goals but raise operational expenses, impacting pricing. This trend enhances supply resilience while requiring firms to adapt to local regulatory and cost dynamics, particularly in high-growth markets like Asia Pacific.

Market Opportunities and Challenges

Opportunities

Rising global seafood demand boosting land-based farming adoption.

Advancements in RAS technology improving efficiency and scalability.

Government support for sustainable aquaculture driving investment in key regions.

Challenges

High initial capital costs limiting entry for small-scale producers.

Energy-intensive operations increasing production expenses.

Regulatory complexities and water use restrictions impacting expansion.

Merger and Acquisition News

Cooke Subsidiary Acquires Aqua Bounty Canada Inc. on Prince Edward Island (February 10, 2025)

On February 10, 2025, Kelly Cove Salmon Ltd. (KCS), a subsidiary of Cooke Aquaculture Inc., acquired the defunct operations of Aqua Bounty Canada Inc. on Prince Edward Island. This deal involved taking over facilities once used for Aqua Bounty's genetically engineered salmon production. Cooke intends to repurpose these assets to produce large smolts for its ocean-based salmon farming operations in Atlantic Canada, focusing on job preservation and operational expansion rather than continuing Aqua Bounty's biotech approach.

New Investor Group Led by Former CEO Acquires Noray Seafood (April 23, 2024)

On April 23, 2024, a new investor group, spearheaded by Bjørn Aspheim, the co-founder and former CEO of Noray Seafood, completed the acquisition of the Spain-based company. Noray Seafood specializes in land-based shrimp aquaculture, aiming to deliver sustainable, high-quality shrimp. Aspheim's return as CEO through this acquisition signals a strategic push to scale the company's innovative technology and strengthen its foothold in the European seafood market.

Growth Trend Analysis

FAO data highlights that in 2022, 38% of aquatic animal production (70 million tonnes) occurred in inland waters, with 84% from aquaculture and 16% from capture fisheries. This marks a significant expansion of aquaculture over recent decades, boosting inland production and driving demand for land-based seafood farming, particularly freshwater systems. The shift reflects declining wild stocks and a growing reliance on controlled farming, with RAS technology enabling high-density production of species like salmon and trout. In North America, companies like Atlantic Sapphire and Superior Fresh capitalize on this trend, meeting retail demand for sustainable, locally farmed seafood. In Europe, Norway and Denmark lead with seawater RAS, leveraging decades of aquaculture expertise to supply premium salmon to food service markets. Asia Pacific, particularly China, sees freshwater farming growth for tilapia and shrimp, supported by government policies promoting inland aquaculture. The stable outlook for 2025, with a CAGR of 6-7%, aligns with this expansion, though growth is tempered by space and regulatory limits on seawater systems. Globally, the rise of land-based farming supports a robust market trajectory, with freshwater systems gaining traction in inland regions and seawater setups dominating premium export markets, underpinned by consumer demand for sustainable seafood.

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