

Water Treatment for Aquaculture Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Product Type

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Abstracts

Water Treatment for Aquaculture Market Summary

Introduction

The water treatment for aquaculture market encompasses technologies and solutions designed to manage and purify water used in the farming of aquatic organisms, such as fish, shellfish, and aquatic plants, ensuring optimal conditions for growth while mitigating environmental impacts. This market is critical to addressing the challenges posed by aquaculture wastewater, which contains organic matter, nitrogen, and phosphorus primarily from residual feed and aquatic organism excretions. According to research, producing 1 kg of fish generates approximately 162 g of excretions, including 50 g of protein, 31 g of lipids, and 81 g of carbohydrates, with only about 25% of feed protein utilized by the species, leaving significant ammonia and organic nitrogen in the water. Phosphorus inputs, largely from feed (97%–98%), result in 72%–89% deposition in water bodies. Emerging contaminants, such as antibiotics like enrofloxacin, florfenicol, and sulfamethoxazole, further complicate wastewater management. Treatment technologies are categorized into physical (e.g., foam separation, membrane filtration), chemical (e.g., ozone treatment, electrochemical methods), and biological (e.g., microbial agents, constructed wetlands, ecological farming). The market is driven by global aquaculture production, which surged to 223.2 million tons in 2022, a 4.4% increase from 2020, with top producers like China (36% of global output), India, Indonesia, and Vietnam accounting for 89.8% of production. The industry faces pressures from stringent environmental regulations and the need for sustainable practices, while trends like recirculating aquaculture systems (RAS), UV disinfection, and biofiltration shape its future. Key players like Veolia, bolstered by its 2022 merger

with SUEZ, and Xylem lead in innovation, addressing both commercial and environmental demands.

Market Size and Growth Forecast

The global water treatment for aquaculture market is projected to reach USD 2.5–3.0 billion by 2025, with an estimated compound annual growth rate (CAGR) of 7%–9% through 2030. This growth is propelled by rising global seafood demand, stricter environmental regulations, and advancements in water treatment technologies. The market benefits from the expansion of aquaculture operations and the increasing adoption of sustainable systems like RAS to address water scarcity and pollution concerns.

Regional Analysis

Asia Pacific dominates the water treatment for aquaculture market, with an estimated growth rate of 8%–10%. China, the world's largest aquaculture producer, drives demand due to its extensive fish and shrimp farming, supported by companies like Hishing and Zhongkehai. India and Indonesia see robust growth, fueled by increasing seafood exports and government initiatives for sustainable aquaculture. Vietnam, a key exporter, emphasizes advanced treatment systems to meet international standards. North America follows with a growth rate of 6%–8%, led by the United States, where environmental regulations and consumer demand for sustainable seafood drive adoption of advanced systems like UV disinfection and RAS. Canada supports growth through salmon farming innovations. Europe, with a growth rate of 5.5%–7.5%, is driven by Norway and the UK, where stringent environmental policies promote eco-friendly solutions for salmon and shellfish farming. South America, with a growth rate of 4.5%–6.5%, sees contributions from Chile, a major salmon producer, where wastewater treatment is critical for export compliance. The Middle East and Africa, with growth estimated at 4%–6%, are emerging markets, with Egypt and South Africa showing potential due to growing aquaculture sectors, though limited by infrastructure and economic constraints.

Application Analysis

Fish Farming: Expected to grow at a CAGR of 7.5%–9.5%, this segment dominates due to its scale, particularly in Asia Pacific. Technologies like RAS and biofiltration address high organic loads and nitrogen pollution, with trends focusing on automation and IoT integration for real-time water quality monitoring.

Shellfish Farming: Projected to grow at a CAGR of 6%–8%, this segment includes shrimp and oyster farming, with a focus on managing antibiotic residues and phosphorus deposition. Trends include ozone and UV disinfection to ensure biosecurity and compliance with export standards.

Others: Including aquatic plant and algae cultivation, this segment is expected to grow at a CAGR of 5%–7%. Trends emphasize ecological treatment methods like constructed wetlands to support sustainable niche farming.

Type Analysis

Equipment: Expected to grow at a CAGR of 7.5%–9.5%, this segment includes RAS, UV disinfection systems, and filtration units. Trends focus on energy-efficient designs and IoT-enabled systems for automated water quality control, as seen in Xylem's offerings.

Consumables: Projected to grow at a CAGR of 6%–8%, consumables include microbial agents, chemical disinfectants, and filter media. Trends include the shift toward eco-friendly microbial solutions to reduce chemical use.

Others: Including services like system maintenance and monitoring, this segment is expected to grow at a CAGR of 5.5%–7.5%. Trends focus on digital platforms for predictive maintenance and compliance reporting.

Key Market Players

Veolia: A France-based global leader, Veolia provides sustainable water treatment solutions, including RAS and biofiltration systems, strengthened by its 2022 merger with SUEZ, enhancing its aquaculture portfolio.

SUEZ: A France-based company, now part of Veolia, SUEZ specializes in advanced water treatment technologies like ozone and membrane filtration, focusing on eco-friendly solutions for aquaculture.

Waterco: An Australia-based firm, Waterco produces filtration and disinfection systems, catering to small and medium-scale aquaculture operations with cost-effective solutions.

AKVA: A Norway-based leader, AKVA supplies RAS and monitoring systems,

emphasizing sustainable technologies for salmon and marine fish farming.

Xylem: A U.S.-based company, Xylem offers UV sterilizers, pumps, and IoT-integrated systems, focusing on energy-efficient solutions for global aquaculture markets.

Pentair: A U.S.-based manufacturer, Pentair provides filtration and RAS equipment through its Aquatic Eco-Systems division, targeting large-scale fish and shellfish farms.

Aquafine: A U.S.-based firm under Xylem, Aquafine specializes in UV disinfection systems, ensuring biosecurity and water purity in aquaculture.

Hishing: A China-based company, Hishing produces cost-competitive filtration and treatment systems, serving Asia's expansive aquaculture sector.

Zhongkehai: A China-based manufacturer, Zhongkehai focuses on biological and chemical treatment solutions for fish and shrimp farming, with a strong domestic presence.

Guangzhou Lanling: A China-based firm, Guangzhou Lanling supplies affordable water treatment equipment, targeting small-scale aquaculture farms in Asia.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate. High capital costs, technical expertise, and regulatory compliance create barriers, but regional players like Hishing in Asia pose a moderate threat with cost-competitive solutions.

Threat of Substitutes: Moderate. Chemical treatments and traditional pond management compete but are less sustainable, while advanced technologies like RAS and UV systems reduce substitution risks in regulated markets.

Bargaining Power of Buyers: Moderate to High. Large aquaculture farms have leverage due to bulk purchasing, but specialized systems like RAS limit switching options in premium segments.

Bargaining Power of Suppliers: Moderate. Suppliers of components like UV lamps and membranes hold some leverage due to specialized inputs, but vertical integration by players like Veolia balances this power.

Competitive Rivalry: High. Veolia, Xylem, and Pentair compete on innovation and sustainability, while Chinese players like Zhongkehai drive price competition, intensifying rivalry in cost-sensitive markets.

Market Opportunities and Challenges

Opportunities

Rising Seafood Demand: Global aquaculture production, projected to exceed 260 million tons by 2030, drives demand for water treatment to support sustainable fish and shellfish farming.

Environmental Regulations: Stricter wastewater discharge standards, particularly in Europe and North America, boost adoption of advanced systems like RAS and UV disinfection.

Technological Advancements: IoT and AI-driven monitoring, as seen in Xylem's solutions, enhance water quality control, attracting investment in smart aquaculture systems.

Emerging Markets Growth: Expansion in India, Vietnam, and Egypt, with growing aquaculture sectors, creates opportunities for affordable treatment solutions like those from Guangzhou Lanling.

Sustainability Trends: Biofiltration and ecological methods, such as constructed wetlands, align with global sustainability goals, driving demand in eco-conscious markets.

Challenges

High Capital Costs: Advanced systems like RAS require significant investment, limiting adoption among small-scale farms in developing regions.

Antibiotic Pollution: Emerging contaminants like antibiotics in wastewater require specialized treatments, increasing costs and complexity for compliance.

Raw Material Volatility: Price fluctuations for components like UV lamps and

membranes impact production costs, particularly for smaller players.

Supply Chain Disruptions: Global logistics challenges, as seen in 2021–2022, affect the availability of specialized equipment, delaying project timelines.

Regulatory Compliance: Stringent environmental standards, such as EU's Water Framework Directive, increase compliance costs, particularly for chemical treatment solutions.

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