

Asia Pacific Aquaculture Market Size and Forecast (2021 - 2031)

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Abstracts

The Asia Pacific Aquaculture Market is projected to grow significantly, reaching an estimated US\$ 591,989.2 million by 2031, up from US\$ 407,681.2 million in 2024. This growth represents a compound annual growth rate (CAGR) of 5.5% from 2025 to 2031, indicating a robust expansion in the aquaculture sector across the region.

Executive Summary and Market Analysis

The Asia Pacific region is home to a diverse and thriving aquaculture industry, with key players including China, India, Japan, Australia, South Korea, Indonesia, and Vietnam. The demand for seafood is rapidly increasing, particularly in China and India, which are the largest markets for aquaculture products. According to the Food and Agriculture Organization (FAO), Asia accounts for over 89% of global aquaculture production, with China alone contributing more than 57% of this total. This dominance positions Asia Pacific as the largest consumer and exporter of aquaculture products globally.

Aquaculture and fisheries are vital sectors that significantly contribute to the economic growth of many Asia Pacific countries. However, the economic impact of aquaculture varies, with South and Southeast Asian nations experiencing lower contributions compared to their East Asian counterparts. Seafood products are among the most traded commodities in the region, generating substantial foreign exchange earnings. In recent years, developing countries like India and Thailand have emerged as net exporters of fish, a trend that is expected to continue and further enhance the aquaculture market in Asia Pacific.

Strategic Insights

Market Segmentation Analysis

The Asia Pacific Aquaculture Market can be segmented by product type and culture environment. By product type, the market includes categories such as Fish (including Salmon, Tuna, Cod, and others), Aquatic Plants, Crustaceans, and Mollusca. The Fish segment is anticipated to dominate the market in 2024. In terms of culture environment, the market is divided into Freshwater, Marine Water, and Brackish Water, with the Brackish Water segment leading in 2024.

Market Outlook

One of the most promising advancements in aquaculture technology is the development of Recirculating Aquaculture Systems (RAS). This innovative approach allows for the continuous reuse of water in aquaculture operations, utilizing advanced biological and mechanical processes to filter and purify water. RAS technology minimizes water consumption while ensuring optimal living conditions for aquatic species, making it an efficient and environmentally friendly method of seafood production.

RAS can be adapted to various farming models, from traditional outdoor setups to high-intensity indoor facilities. In super-intensive systems, water reuse can reduce the need for fresh water by up to 97%, requiring only about 3 cubic meters of water per kilogram of fish produced. This technology provides producers with precise control over critical environmental parameters such as temperature, pH, and carbon dioxide levels, which are essential for healthy fish growth and disease prevention. The integrated components of RAS, including pumps, bio-filters, and UV sterilizers, create a closed-loop system that maximizes efficiency and biosecurity.

From an environmental standpoint, RAS is highly appealing as it significantly reduces freshwater usage and minimizes waste discharge, aligning with global sustainability efforts in aquaculture. As the technology continues to evolve, it sets new standards for responsible growth and long-term viability in the seafood industry. Companies in the aquaculture sector are increasingly investing in RAS to enhance production and meet rising market demand. A notable initiative is the GK Mie RAS Atlantic Salmon Project, a collaboration between Pure Salmon Technology and Soul of Japan K.K., set to launch in June 2024. This project aims to produce 10,000 tonnes of Atlantic salmon annually, establishing Asia's largest land-based salmon farm.

International organizations like the FAO are also advocating for the adoption of RAS, emphasizing its role in promoting environmental sustainability, optimizing water use,

and enhancing biosecurity protocols, all of which contribute to more resilient aquaculture operations.

Country Insights

The Asia Pacific Aquaculture Market is further segmented by country, including Australia, China, India, Japan, South Korea, and the Rest of APAC. China holds the largest market share, with a well-developed aquaculture sector that produces significantly more fish than it consumes. In 2022, China accounted for nearly 57% of global aquaculture production, generating over 50 million tons annually. The country's aquaculture industry encompasses over 150 species, allowing for a diverse range of products to be marketed both domestically and internationally. Key species include tilapia, shrimp, bream, catfish, scallops, carp, oysters, and mussels, with carp alone contributing around 40% of total production. Farming methods in China have diversified to include polyculture, integrated farming, and intensive culture systems, alongside extensive aquaculture practices for microalgae cultivation.

Company Profiles

Key players in the Asia Pacific Aquaculture Market include Cooke Aquaculture Inc., JBS SA, Bakkafrøst, Blue Ridge Aquaculture, Inc., Cermaq Group AS, Danish Salmon, Leroy Seafood Group ASA, Mowi ASA, Stolt-Nielsen Ltd, and Thai Union Group PCL. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative products to consumers.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. AQUACULTURE MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Porter's Five Forces Analysis
 - 4.2.1 Threat of New Entrants:
 - 4.2.2 Threat of Substitutes:
 - 4.2.3 Bargaining Power of Buyers:
 - 4.2.4 Bargaining Power of Suppliers:
 - 4.2.5 Competitive Rivalry:
- 4.3 Ecosystem Analysis
 - 4.3.1 Raw Material Suppliers
 - 4.3.2 Manufacturers
 - 4.3.3 Distributors or Suppliers
 - 4.3.4 End-Use Industry

5. ASIA PACIFIC AQUACULTURE MARKET - KEY MARKET DYNAMICS

- 5.1 Market Drivers
- 5.2 Market Restraints
- 5.3 Market Opportunities
- 5.4 Future Trends
- 5.5 Impact of Drivers and Restraints:

6. AQUACULTURE MARKET - ASIA PACIFIC MARKET ANALYSIS

- 6.1 Asia Pacific Aquaculture Market Volume (Kilo Tons), 2021 - 2031
- 6.2 Asia Pacific Aquaculture Market Volume Forecast and Analysis (Kilo Tons)
- 6.3 Asia Pacific Aquaculture Market Revenue (US\$ Million), 2024 -2031
- 6.4 Asia Pacific Aquaculture Market Forecast and Analysis

7. ASIA PACIFIC AQUACULTURE MARKET VOLUME AND REVENUE ANALYSIS - BY PRODUCT TYPE

7.1 Fish

7.1.1 Overview

7.1.2 Fish: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

7.1.3 Fish: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Salmon

7.2.1 Overview

7.2.2 Salmon: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

7.2.3 Salmon: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.3 Tuna

7.3.1 Overview

7.3.2 Tuna: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

7.3.3 Tuna: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.4 Cod

7.4.1 Overview

7.4.2 Cod: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

7.4.3 Cod: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031

(US\$ Million)

7.5 Others Fish

7.5.1 Overview

7.5.2 Others Fish: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

7.5.3 Others Fish: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.6 Aquatic Plants

7.6.1 Overview

7.6.2 Aquatic Plants: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

7.6.3 Aquatic Plants: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.7 Crustaceans

7.7.1 Overview

7.7.2 Crustaceans: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

7.7.3 Crustaceans: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.8 Mollusca

7.8.1 Overview

7.8.2 Mollusca: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

7.8.3 Mollusca: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.9 Others

7.9.1 Overview

7.9.2 Others: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

7.9.3 Others: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. ASIA PACIFIC AQUACULTURE MARKET REVENUE ANALYSIS - BY CULTURE ENVIRONMENT

8.1 Freshwater

8.1.1 Overview

8.1.2 Freshwater: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 Marine Water

8.2.1 Overview

8.2.2 Marine Water: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.3 Brackish Water

8.3.1 Overview

8.3.2 Brackish Water: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. ASIA PACIFIC AQUACULTURE MARKET - COUNTRY ANALYSIS

9.1 Asia Pacific

9.1.1 Asia Pacific Aquaculture Market Revenue and Forecast and Analysis - by Country

9.1.1.1 Asia Pacific Aquaculture Market Volume and Forecast and Analysis - by Country

9.1.1.2 Asia Pacific Aquaculture Market Revenue and Forecast and Analysis - by Country

9.1.2.2 Australia: Asia Pacific Aquaculture Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Kilo Tons)

9.1.2.2.1 Australia: Asia Pacific Aquaculture Market Share - by Product Type

9.1.2.2.2 Australia: Asia Pacific Aquaculture Market Share - by Culture Environment

9.2.3.3 China: Asia Pacific Aquaculture Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Kilo Tons)

9.2.3.3.1 China: Asia Pacific Aquaculture Market Share - by Product Type

9.2.3.3.2 China: Asia Pacific Aquaculture Market Share - by Culture Environment

9.3.4.4 India: Asia Pacific Aquaculture Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Kilo Tons)

9.3.4.4.1 India: Asia Pacific Aquaculture Market Share - by Product Type

9.3.4.4.2 India: Asia Pacific Aquaculture Market Share - by Culture Environment

9.4.5.5 Japan: Asia Pacific Aquaculture Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Kilo Tons)

9.4.5.5.1 Japan: Asia Pacific Aquaculture Market Share - by Product Type

9.4.5.5.2 Japan: Asia Pacific Aquaculture Market Share - by Culture Environment

9.5.6.6 South Korea: Asia Pacific Aquaculture Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Kilo Tons)

9.5.6.6.1 South Korea: Asia Pacific Aquaculture Market Share - by Product Type

9.5.6.6.2 South Korea: Asia Pacific Aquaculture Market Share - by Culture Environment

9.6.7.7 Rest of APAC: Asia Pacific Aquaculture Market - Revenue, Volume, and Forecast, 2021 - 2031 (US\$ Million, Kilo Tons)

9.6.7.7.1 Rest of APAC: Asia Pacific Aquaculture Market Share - by Product Type

9.6.7.7.2 Rest of APAC: Asia Pacific Aquaculture Market Share - by Culture Environment

10 COMPETITIVE LANDSCAPE

10.1 Heat Map Analysis by Key Players

10.2 Company Positioning & Concentration

11 INDUSTRY LANDSCAPE

11.1 Overview

11.2 New Product Development

11.3 Merger and Acquisition

11.4 Other Strategic Developments

12 COMPANY PROFILES

12.1 Cooke Aquaculture Inc.

12.1.1 Key Facts

12.1.2 Business Description

12.1.3 Products and Services

12.1.4 Financial Overview

12.1.5 SWOT Analysis

12.1.6 Key Developments

12.2 JBS SA

12.2.1 Key Facts

12.2.2 Business Description

12.2.3 Products and Services

12.2.4 Financial Overview

12.2.5 SWOT Analysis

12.2.6 Key Developments

12.3 Bakkafrost

12.3.1 Key Facts

12.3.2 Business Description

12.3.3 Products and Services

12.3.4 Financial Overview

- 12.3.5 SWOT Analysis
- 12.3.6 Key Developments
- 12.4 Blue Ridge Aquaculture, Inc.
 - 12.4.1 Key Facts
 - 12.4.2 Business Description
 - 12.4.3 Products and Services
 - 12.4.4 Financial Overview
 - 12.4.5 SWOT Analysis
 - 12.4.6 Key Developments
- 12.5 Cermaq Group AS
 - 12.5.1 Key Facts
 - 12.5.2 Business Description
 - 12.5.3 Products and Services
 - 12.5.4 Financial Overview
 - 12.5.5 SWOT Analysis
 - 12.5.6 Key Developments
- 12.6 Danish Salmon
 - 12.6.1 Key Facts
 - 12.6.2 Business Description
 - 12.6.3 Products and Services
 - 12.6.4 Financial Overview
 - 12.6.5 SWOT Analysis
 - 12.6.6 Key Developments
- 12.7 Leroy Seafood Group ASA
 - 12.7.1 Key Facts
 - 12.7.2 Business Description
 - 12.7.3 Products and Services
 - 12.7.4 Financial Overview
 - 12.7.5 SWOT Analysis
 - 12.7.6 Key Developments
- 12.8 Mowi ASA
 - 12.8.1 Key Facts
 - 12.8.2 Business Description
 - 12.8.3 Products and Services
 - 12.8.4 Financial Overview
 - 12.8.5 SWOT Analysis
 - 12.8.6 Key Developments
- 12.9 Stolt-Nielsen Ltd
 - 12.9.1 Key Facts

- 12.9.2 Business Description
- 12.9.3 Products and Services
- 12.9.4 Financial Overview
- 12.9.5 SWOT Analysis
- 12.9.6 Key Developments
- 12.10 Thai Union Group PCL.
 - 12.10.1 Key Facts
 - 12.10.2 Business Description
 - 12.10.3 Products and Services
 - 12.10.4 Financial Overview
 - 12.10.5 SWOT Analysis
 - 12.10.6 Key Developments

13. APPENDIX

- 13.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Asia Pacific Aquaculture Market Segmentation

Table 3. Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

Table 4. Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 5. Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons) - by Product Type

Table 5. Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 6. Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Culture Environment

Table 7. Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 8. Australia: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons) - by Product Type

Table 9. Australia: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 10. Australia: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Culture Environment

Table 11. China: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons) - by Product Type

Table 12. China: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 13. China: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Culture Environment

Table 14. India: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons) - by Product Type

Table 15. India: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 16. India: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Culture Environment

Table 17. Japan: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons) - by Product Type

Table 18. Japan: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031

(US\$ Million) - by Product Type

Table 19. Japan: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031

(US\$ Million) - by Culture Environment

Table 20. South Korea: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons) - by Product Type

Table 21. South Korea: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 22. South Korea: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Culture Environment

Table 23. Rest of APAC: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons) - by Product Type

Table 24. Rest of APAC: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Product Type

Table 25. Rest of APAC: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Culture Environment

Table 26. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. Asia Pacific Aquaculture Market Segmentation - Country

Figure 2. Porter's Analysis

Figure 3. Ecosystem: Aquaculture Market

Figure 4. Asia Pacific Aquaculture Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Asia Pacific Aquaculture Market Volume (Kilo Tons), 2021 - 2031

Figure 7. Asia Pacific Aquaculture Market Revenue (US\$ Million), 2024 - 2031

Figure 8. Asia Pacific Aquaculture Market Share (%) - by Product Type, 2024 and 2031

Figure 9. Fish: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031
(Kilo Tons)

Figure 9. Fish: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031
(US\$ Million)

Figure 10. Salmon: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031
(Kilo Tons)

Figure 10. Salmon: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031
(US\$ Million)

Figure 11. Tuna: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031
(Kilo Tons)

Figure 11. Tuna: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031
(US\$ Million)

Figure 12. Cod: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031
(Kilo Tons)

Figure 12. Cod: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031
(US\$ Million)

Figure 13. Others Fish: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031
(Kilo Tons)

Figure 13. Others Fish: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 14. Aquatic Plants: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

Figure 14. Aquatic Plants: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 15. Crustaceans: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

Figure 15. Crustaceans: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Mollusca: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

Figure 16. Mollusca: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 17. Others: Asia Pacific Aquaculture Market - Volume and Forecast, 2021 - 2031 (Kilo Tons)

Figure 17. Others: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Asia Pacific Aquaculture Market Share (%) - by Culture Environment, 2024 and 2031

Figure 19. Freshwater: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Marine Water: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 21. Brackish Water: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 22. Asia Pacific Aquaculture Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 23. Australia: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 -

2031 (US\$ Million)

Figure 24. China: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. India: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 26. Japan: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 27. South Korea: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 28. Rest of APAC: Asia Pacific Aquaculture Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 29. Company Positioning & Concentration

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