

Asia Pacific Recirculating Aquaculture Systems Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Offering (Component and Services), Component (Filtration System, Aeration System, Pumping System, and Others), and Fishery Capacity [Small Scale (Upto 20000 Liters), Medium Scale (21000-50000 Liters), and Large Scale (Above 50000 Liters)]

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Abstracts

The Asia Pacific Recirculating Aquaculture Systems (RAS) Market is projected to grow significantly, with an expected market size of approximately US\$ 4,984.1 million by 2031, up from US\$ 2,784.6 million in 2023. This growth represents a compound annual growth rate (CAGR) of 7.6% from 2023 to 2031.

Executive Summary

The aquaculture sector in the Asia Pacific region is expanding rapidly, driven by pressing food security challenges. This growth is characterized by the increasing adoption of recirculating aquaculture systems, which are seen as a sustainable solution to meet the rising demand for seafood. Alongside RAS, advanced aquaculture methods such as integrated multi-trophic aquaculture are gaining traction. The focus is shifting towards cultivating high-value species and integrating smart aquaculture technologies to minimize environmental impacts.

A notable trend is the movement towards land-based aquaculture systems, which

enhance biosecurity and sustainability. This shift is crucial as it addresses the growing demand for seafood while also prioritizing species diversification. The Asia Pacific region is pivotal in global aquaculture, accounting for 90% of the world's aquaculture industry, as highlighted by The Nature Conservancy's initiatives. Collaborations among various stakeholders, including governments, local communities, and farmers, are essential in demonstrating how aquaculture can contribute to food security, economic development, and biodiversity conservation. For example, in Indonesia, which ranks as the second-largest aquaculture producer globally, seaweed farming plays a vital role in supporting economically vulnerable populations and is integral to many consumer products.

Market Segmentation Analysis

The Asia Pacific RAS market can be segmented based on offerings, components, and fishery capacity.

By Offering: The market is divided into Components and Services, with the Components segment holding the largest market share in 2023.

By Component: This segment includes Filtration Systems, Aeration Systems, Pumping Systems, and others, with Filtration Systems leading the market in 2023.

By Fishery Capacity: The market is categorized into Small Scale (up to 20,000 liters), Medium Scale (21,000-50,000 liters), and Large Scale (above 50,000 liters), where the Large Scale segment dominated in 2023.

Market Outlook

As the global population continues to grow, the demand for seafood is expected to rise sharply, driven by changing consumer preferences towards healthier, protein-rich diets. Urbanization and health-conscious eating trends are leading to an increased desire for locally sourced food. RAS offers a viable solution to the challenges posed by urbanization, such as limited space and access to natural water sources. These systems enable fish farming in urban and peri-urban areas, allowing producers to meet local seafood demands while reducing the carbon footprint associated with transporting seafood over long distances.

The increasing global demand for seafood presents a significant opportunity for the RAS market, as these systems provide a sustainable and efficient means to fulfill the growing need for high-quality seafood.

Country Insights

The Asia Pacific RAS market is further segmented by country, including Australia, China, India, Japan, South Korea, and the Rest of APAC. China is the largest market player, having experienced substantial growth in its sea-based aquaculture production. For instance, in the first seven months of 2024, China reported a 5.2% year-over-year increase in seawater-based aquaculture output, reaching 13 million metric tons. This growth is attributed to the government's strategic focus on expanding mariculture practices along the coast while tightening regulations on freshwater aquaculture. Significant investments from state-owned enterprises in large-scale mariculture operations have also been made.

Moreover, there is a rising interest in sustainable aquaculture models, particularly RAS, which is contributing to growth in inland areas. This trend reflects the broader expansion of China's seafood production, which increased by 4% overall, underscoring the growing importance of RAS in the country's aquaculture sector.

Company Profiles

Key players in the RAS market include Veolia, AKVA Group ASA, Innovasea Systems Inc., FutureFish Aquaculture GmbH, Xylem Inc., MAT-KULING RECIRCULATING AQUACULTURE SYSTEMS, PR Aqua, ULC, Integrated Aqua Systems, Inc., AquaMaof Aquaculture Technologies Ltd., and Aquavet Solutions Limited. These companies are employing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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