

Middle East & Africa Aquaculture Market Size and Forecast (2021 - 2031)

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Abstracts

The aquaculture market in the Middle East and Africa is poised for significant growth, with projections indicating that the market size will reach approximately US\$ 45,200.2 million by 2031, up from US\$ 31,914.0 million in 2024. This growth trajectory reflects a compound annual growth rate (CAGR) of 5.1% from 2025 to 2031.

Executive Summary and Market Analysis

The aquaculture industry in the Middle East and Africa is experiencing rapid development, primarily driven by the increasing demand for seafood in countries such as South Africa, Saudi Arabia, and the UAE. Historically, these nations have depended heavily on seafood imports from Asia Pacific and Europe. However, there is a noticeable shift towards enhancing domestic production to tackle food security concerns, especially in Gulf Cooperation Council (GCC) countries, which currently import over 60% of their seafood.

Changing consumer preferences are also influencing this transition. While wild-caught fish were traditionally preferred for their perceived quality and taste, aquaculture products are now being recognized as reliable and sustainable alternatives. The region's limited freshwater resources and challenging climatic conditions have prompted governments to invest in aquaculture as a strategic solution. For instance, Saudi Arabia has set ambitious targets to increase its annual aquaculture output to 530,000 tons by 2030 as part of its Vision 2030 initiative.

Governments across the region are actively promoting both local and foreign investments by providing incentives, reducing regulatory barriers, and supporting infrastructure development. Initiatives include the distribution of fingerlings of native

species, site mapping for aquaculture suitability, and the establishment of national strategies, such as the UAE's plan to expand sustainable fish farms utilizing advanced recirculating systems. With rising seafood prices and increasing institutional support, aquaculture is emerging as a lucrative investment opportunity. Upcoming projects focusing on premium species like sturgeon, caviar, and salmon are expected to further boost market growth.

Market Segmentation Analysis

The Middle East and Africa aquaculture market can be segmented by product type and culture environment. By product type, the market includes categories such as Fish, Salmon, Tuna, Cod, Aquatic Plants, Crustaceans, Mollusca, and others. The Fish segment is expected 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

Aquaculture is recognized as an efficient and cost-effective method for fish production, offering ecological benefits and scalability for both small and large-scale operations. Despite facing environmental challenges such as pollution and habitat disruption, the industry is undergoing transformative changes driven by innovations in disease control, sustainable practices, advanced technologies, and genetic improvements in cultured species.

A significant growth driver for aquaculture is the increasing global demand for fish oil. As consumption rises across various sectors, there is an urgent need to enhance fish production to ensure a stable supply of this valuable resource. Fish oil, known for its rich content of omega-3 fatty acids, is widely used in dietary supplements and the pharmaceutical, healthcare, and food industries. It is recognized for its health benefits, including its role in reducing triglyceride levels and supporting heart health.

As consumer awareness of the benefits of fish oil continues to grow, the demand for this product is expected to rise, creating substantial growth opportunities for the aquaculture sector. Fish oil is becoming increasingly important in healthcare, pharmaceuticals, and wellness industries, reinforcing aquaculture's role in the global supply chain.

Country Insights

The Middle East and Africa aquaculture market is further segmented by country, including South Africa, Saudi Arabia, the United Arab Emirates, and the Rest of Middle East and Africa. The Rest of Middle East and Africa held the largest market share in 2024. Aquaculture in this region is progressing steadily, supported by changing economic conditions and the emergence of small-scale producers. The rising consumer demand for seafood is anticipated to accelerate market development.

According to the Food and Agriculture Organization (FAO), aquaculture production in Africa has grown at an average annual rate of over 10% over the past decade, with countries like Egypt, Nigeria, and Ghana leading this expansion. In the Middle East, investments in land-based aquaculture systems are increasing, driven by government-backed initiatives focused on sustainability and food security.

Company Profiles

Key players in the Middle East and Africa 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.

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