

South & Central America Aquaculture Market Size and Forecast (2021 - 2031)

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Abstracts

The South and Central America Aquaculture Market is poised for significant growth, with projections indicating that its size will reach approximately US\$ 49,506.5 million by 2031, up from US\$ 34,700.0 million in 2024. This growth trajectory reflects a compound annual growth rate (CAGR) of 5.2% from 2025 to 2031, highlighting the region's emerging role in the global aquaculture landscape.

Executive Summary and Market Analysis

South and Central America is becoming a vibrant player in the aquaculture sector, demonstrating robust growth despite its relatively less developed status compared to other regions. Economic advancements in countries like Brazil and Argentina, fueled by population growth and technological innovations, are driving the expansion of aquaculture activities. Argentina, with its extensive coastline along the South Atlantic Ocean, possesses rich marine resources, although the challenges of industrial-scale fish production, including environmental and social issues, remain significant. Additionally, domestic fish consumption in Argentina has been relatively low, which has constrained internal demand in recent years.

In Brazil, shifts in consumer behavior and dietary preferences are accelerating the development of aquaculture. As the second-largest aquaculture producer in South America, following Chile, Brazil produces around 700,000 tons of fish annually, with tilapia being the most prominent species. The region has considerable potential for cultivating various aquatic species, including fish, crustaceans, and mollusks. Notably, high levels of seafood imports in Brazil and Argentina suggest that there are substantial opportunities for local production and market growth. Chile continues to dominate the region in terms of aquaculture output and exports, being the second-largest global

producer of salmonids and mussels.

Strategic Insights

Market Segmentation Analysis

The South and Central America 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, Mollusks, and others. In 2024, the Fish segment was the market leader. In terms of culture environment, the market is divided into Freshwater, Marine Water, and Brackish Water, with the Brackish Water segment also leading in 2024.

Market Outlook

One of the most promising advancements in aquaculture is the adoption of Recirculating Aquaculture Systems (RAS). This innovative technology is designed to revolutionize fish farming by allowing for the repeated use of water within aquaculture operations. RAS employs sophisticated biological and mechanical processes to filter and purify water, significantly reducing water consumption while ensuring optimal living conditions for aquatic species. This method is not only efficient but also environmentally responsible, aligning with global sustainability goals.

RAS technology is versatile and can be implemented in various farming models, from traditional outdoor setups to high-intensity indoor facilities. In super-intensive systems, RAS 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 system allows producers to maintain 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 minimizes freshwater usage and reduces waste discharge, making it a key player in promoting sustainable aquaculture practices. The ability to recycle water multiple times without compromising fish health represents a significant advancement in resource-efficient seafood production. Recognizing its potential, many companies in the aquaculture sector are investing in RAS to enhance output and meet the growing market demand.

Organizations like the Food and Agriculture Organization (FAO) are also advocating for

the widespread adoption of RAS to improve environmental sustainability and biosecurity in aquaculture operations.

Country Insights

The South and Central America Aquaculture Market is further segmented by country, including Brazil, Argentina, and the Rest of South and Central America. In 2024, the Rest of South and Central America held the largest market share, with countries such as Chile, Colombia, Venezuela, and Peru contributing significantly. Chile, in particular, leads the region in fish production, primarily focusing on salmonid species, which dominate both harvest volumes and exports. The country also cultivates Gracilaria algae, scallops, mussels, and oysters using efficient aquaculture systems.

Chile's competitive edge lies in its ability to produce fish feed domestically from locally sourced raw materials, which supports cost-effective and scalable operations. Across the region, increasing consumer awareness of the nutritional benefits of fish and a shift towards healthier lifestyles are driving market growth. The availability of diverse fish products from manufacturers is further supporting the expansion and diversification of the aquaculture sector.

Company Profiles

Key players in the South and Central America 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, including expansion, product innovation, and mergers and acquisitions, to enhance their market presence and offer innovative products to consumers.

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