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Aquaculture Market Research Report - Global Forecast till 2030

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Description:

Global Aquaculture Market Overview:

Aquaculture Market Size was valued at USD 152.2 billion in 2021. The aquaculture market industry is projected to grow from USD 160.9 billion in 2022 to USD 237.3 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 5.71% during the forecast period (2022 - 2030). Increased demand for fish oil is increasingly in demand across various sectors, including food and beverage, medicines, nutraceuticals and expanding commercial operations in seafood are the key market drivers enhancing the market growth.

Aquaculture Market Overview

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Aquaculture Market Trends

- **Rising seafood demand is expected to propel the market growth in the coming years**

Seafood is any aquatic species that can be eaten from the ocean and freshwater, including lobsters, crabs, mussels, and occasionally other sea life. The increased demand for seafood contributes to aquaculture's growing importance in the fish supply. For instance, the Organization for Economic Cooperation and Development (OECD), an intergovernmental economic organization with headquarters in France, estimates that 90% of the fish produced will be consumed by humans, which is expected to rise by 16.3% by 2029. The market CAGR will expand due to the growing demand for seafood.

Furthermore, several diverse cultural traditions heavily emphasize the consumption of fish. Given the quantity of protein, vitamins, fatty acids, vital micronutrients, and minerals in fish, it has a great nutritional profile regarding its positive impacts on health. Fish is an excellent source of omega-3 fatty acids, which have many health benefits, including reducing the risk of heart attacks, preventing depression, preventing childhood asthma, and enhancing brain health. Fish is also a good source of other essential nutrients and vitamins. The demand for seafood products is predicted to increase due to these factors, which will accelerate market expansion over the anticipated period. For instance, in December 2018, Fast&Up, an Aeronutrix Sports Products Private Limited division, introduced Promega, a new omega-3-rich fish oil. The product claims it will help the immune system and brain development.

Figure 1: Demand for seafood from various countries

Demand for seafood from various countries

Source: Secondary Research, Primary Research, MRFR Database, and Analyst Review

Furthermore, government initiatives and supportive policies are crucial in creating an environment conducive to aquaculture-related businesses. It covers research, legislative framework, and infrastructure. The United Nations Food and Agriculture Organization (UN FAO) has identified a future supply and demand mismatch for seafood. The demand for seafood is expected to exceed 260 million tonnes by 2030, while the supply is anticipated to be 210 million tonnes at the current production rate. As a result, it is considered a reliable source to satisfy the rising demand for seafood.

However, technological innovations are a crucial trend that is becoming increasingly popular in the aquaculture sector. For instance, in October 2019, the Commonwealth Scientific and Industrial Research Organisation (CSIRO), an Australian government agency for scientific research, developed a tool using augmented reality (AR) that uses novel pond and animal sensor technologies, data modeling, the next generation of data interaction techniques, situational awareness, and decision support for immediate understanding of key water quality parameters like pH, dissolved oxygen, and more. Thus, it acts as another trend driving the growth of the aquaculture market revenue.

Aquaculture Market Segment Insights:

Aquaculture Environment Insights

The aquaculture market segmentation, based on environment, includes freshwater, marine water and brackish water. The freshwater category held the majority share in 2021 in respect to the aquaculture market revenue attributed to the swift growth of aquaculture as a practical substitute for wild fishing. Natural freshwater sources include ice sheets, glaciers, icebergs, bogs, ponds, lakes, rivers, and streams. Freshwater is also found underground in aquifers and underground streams. The three species of freshwater fish that predominate are salmon, trout, and tench. Over 95% of the world's freshwater aquaculture market is produced in Asia, with China dominating the region. To encourage the growth of freshwater fish output in the nation, which fuels the industry, Bangladesh's 1998 fisheries plan contained a mechanism for freshwater aquaculture.

April 2018: Chinese Jin Yu Tang Aquaculture (Cambodia) Co announced that it will invest about \$100 million in

freshwater and marine projects. This expenditure will completely destroy Preah Sihanouk and Koh Kong provinces.

Aquaculture Type Insights

The aquaculture market segmentation, based on type, includes fishes, crustaceans, mollusca and others. The fishes segment dominated the market in 2021 and is projected to be the faster-growing segment during the forecast period, 2022-2030. Fish demand is driven by growing knowledge of the health advantages of seafood. For instance, fish has several health advantages and is a good source of minerals, vitamins, and proteins. Hence, increased fish consumption due to its nutritional value positively impacts market growth.

August 2021: Siemens provides money to Singapore Aquaculture Technologies. Through Siemens Project Ventures GmbH, the financing division of Siemens AG, Siemens Financial Services (SFS), reportedly contributed most of the equity investment. Siemens' involvement demonstrates its commitment to being the top supplier of premium fish products and data- and AI-driven aquaculture solutions under the BluCurrent brand.

Figure 2: Aquaculture Market by Type, 2021 & 2030 (USD Billion)

Aquaculture Market by Type, 2021 & 2030

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Besides, the mollusca category is anticipated to grow significantly over the forecast period as per the aquaculture market data, due to high demand, especially from applications related to food and nutrition. Fish species based on mollusks make up the majority of the aquatic life in the ocean. Molluscs are recognized as an important source of food.

Aquaculture Regional Insights

By region, the study provides the market insights into North America, Europe, Asia-Pacific, and the Rest of the World. The Asia Pacific aquaculture market accounted for USD 69.7 billion in 2021 and is expected to exhibit a 45.80% CAGR during the study period. Population growth, economic growth, and sociological variables like customary fish consumption patterns contribute to the Asian-Pacific region's demand for firms.

Further, the major countries studied in the market report are: The U.S., Canada, Germany, France, the UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

Figure 3: AQUACULTURE MARKET SHARE BY REGION 2021 (%)

AQUACULTURE MARKET SHARE BY REGION 2021

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

North American aquaculture market accounts for the second-largest market share due to the government's strong support for its development. Additionally, the species that have made a significant contribution to the growth of the sector, such as salmonids and mollusks, particularly hard clams, oysters, and mussels, are expected to fuel the expansion of the market in the area in the years to come. Further, the U.S. aquaculture market held the largest market share, and the Canada aquaculture market was the fastest-growing market in the North American region.

The European aquaculture market is expected to grow at a substantial CAGR from 2022 to 2030. The primary driver of European market growth is the increased demand for fish as a nutritious food. Better sources of protein include fish and various types of seafood. Moreover, UK aquaculture market held the largest market share, and the France aquaculture market was the fastest-growing market in the European region.

Due to the favorable climate and abundance of natural resources in the area, the aquaculture industry in UK is predicted to grow quickly. There is a rising need for cutting-edge goods that can help create higher-quality products and increase the effectiveness of operations now that there is more area accessible for the practice. For instance, in July 2020, the leading protein market provider in the food sector, Urner Barry, announced an expansion of its coverage of shrimp trading in the European market.

Aquaculture Key Market Players & Competitive Insights

Major market players are spending a lot on R&D to increase their product lines, which will help the aquaculture industry grow even more. Market participants are also taking various strategic initiatives to grow their worldwide footprint, including new product launches, contractual agreements, mergers and acquisitions, increased investments, market developments and collaboration with other organizations. Competitors in the industry must offer cost-effective items to expand and survive in an increasingly competitive and rising market industry.

One of the primary business strategies manufacturers adopt in the aquaculture industry to benefit clients and expand the sector is manufacturing locally to reduce operating costs. In recent years, aquaculture industry has provided medicine with some of the most significant benefits. The aquaculture market major player such as Nippon Suisan Kaisha Ltd. (Japan), American Abalone Farms (US), Cermaq ASA (Norway), Dainichi Corporation (Japan) and Cargill Incorporated (US).

Cermag ASA (Norway) is a leader in salmon production, driving the food system's transition to healthier, more environmentally friendly food. In August 2021, a deal on integrated salmon and kelp farming was reached between the salmon producer Cermaq and the aquaculture business Folla Alger in association with top scientific institutions in Norway.

Also, Blue Ridge Aquaculture Inc. (US) is the world's largest tilapia producer, employing indoor recirculating aquaculture systems (RAS). It produces 4 million pounds of tilapia annually, shipping 10,000 to 20,000 pounds of live tilapia daily. These fish are not fed antibiotics or hormones and are free of mercury (undetectable levels in independent studies) and other industrial pollutants. In October 2020, the construction of a brand-new, cutting-edge nursery facility will cost \$2.5 million, supporting Blue Ridge Aquaculture's (BRA) current farming operations and long-term expansion goals.

Key Companies in the aquaculture market includes

- Nippon Suisan Kaisha Ltd. (Japan)
- American Abalone Farms (US)
- Cermaq ASA (Norway)
- Dainichi Corporation (Japan)
- Cargill Incorporated (US)

- Austevoll Seafood ASA (Norway)
- Charoen Pokphand Foods PCL (Thailand)
- Blue Ridge Aquaculture Inc. (US)
- Mowi ASA (Norway)
- Tassal Group Ltd. (Australia)
- Sea Watch International Ltd. (US)
- Grieg Seafood ASA (Norway)
- Maruha Nichiro Corporation (Japan)
- Cooke Aquaculture (Canada)
- Thai Union Group PLC (Thailand)

Aquaculture Industry Developments

March 2022: WorldFish announced a comprehensive legal agreement with Premium Aquaculture Limited for the transfer of Genetically Improved Farmed Tilapia (GIFT) to Nigeria. Due to this agreement, Nigeria will be able to establish a company based on GIFT. By 2023, WorldFish/PAL GIFT tilapia should be available in Nigerian fish markets because to a partnership between WorldFish and PAL, the Bill and Melinda Gates Foundation (BMGF), and USAID.

November 2021: Huon Aquaculture was purchased by Brazilian meat processing company JBS S.A. for \$425 million. JBS S.A. could enter the industry with the aid of this acquisition. Australia-based Huon Aquaculture is an aquaculture and food processing company.

November 2019: Van Cleve Seafood Co. introduced a new food category, plant-based seafood, which supplies conventional seafood while also providing delicious plant-based seafood products to US consumers.

Aquaculture Market Segmentation

Aquaculture Environment Outlook

- Freshwater
- Marine Water
- Brackish Water

Aquaculture Type Outlook

- Fishes
- Crustaceans
- Mollusca
- Others

Aquaculture Regional Outlook

- North America
 - US
 - Canada
- Europe
 - Germany
 - France
 - UK
 - Italy
 - Spain
 - Rest of Europe
- Asia-Pacific
 - China
 - Japan

- India
 - Australia
 - South Korea
 - Australia
 - Rest of Asia-Pacific
-
- Rest of the World
 - Middle East
 - Africa
 - Latin America

Report Attribute/Metric	Details
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Market Size 2021	USD 152.2 Billion
Market Size 2022	USD 159.2 Billion
Market Size 2030	USD 237.3 Billion
Compound Annual Growth Rate (CAGR)	5.71% (2022-2030)
Base Year	2021
Forecast Period	2022-2030
Historical Data	2018 & 2020
Forecast Units	Value (USD Billion)
Report Coverage	Revenue Forecast, Competitive Landscape, Growth Factors, and Trends
Segments Covered	Environment, Type and Region
Geographies Covered	North America, Europe, Asia Pacific, and Rest of the World
Countries Covered	The U.S, Canada, Germany, France, UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil
Key Companies Profiled	Nippon Suisan Kaisha Ltd. (Japan), American Abalone Farms (US), Cermaq ASA (Norway), Dainichi Corporation (Japan), Cargill Incorporated (US) and Austevoll Seafood ASA (Norway)

Key Market Opportunities	Growing demand for new products aids in the efficiency of aquaculture activities
Key Market Dynamics	<p>Growing seafood demand is expected to propel the market forward</p> <p>Rising demand for fish oil to drive the market growth</p>

Table of Content:

Contents	
Table of Contents	
1 Executive Summary	
2 Scope of the Report	
2.1 Market Definition	
2.2 Scope of the Study	
2.2.1 Research Objectives	
2.2.2 Assumptions & Limitations	
2.3 Market Structure	
3 Market Research Methodology	
3.1 Research Process	
3.2 Secondary Research	
3.3 Primary Research	
3.4 Forecast Model	
4 Market Landscape	
4.1 Supply Chain Analysis	
4.1.1 Raw Material Suppliers	
4.1.2 Manufacturers/Producers	
4.1.3 Distributors/Retailers/Wholesalers/E-Commerce	
4.1.4 End Users	
4.2 Porter's Five Forces Analysis	
4.2.1 Threat of New Entrants	
4.2.2 Bargaining Power of Buyers	
4.2.3 Bargaining Power of Suppliers	
4.2.4 Threat of Substitutes	
4.2.5 Internal Rivalry	
5 Market Dynamics of the Global Aquaculture Market	
5.1 Introduction	
5.2 Drivers	
5.3 Restraints	
5.4 Opportunities	
5.5 Challenges	
6. Global Aquaculture Market, by Environment	
6.1 Introduction	
6.2 Freshwater	
6.2.1 Market Estimates & Forecast, 2022-2030	
6.2.2 Market Estimates & Forecast, by Region, 2022-2030	
6.3 Marine Water	
6.3.1 Market Estimates & Forecast, 2022-2030	
6.3.2 Market Estimates & Forecast, by Region, 2022-2030	
6.4 Brackish Water	
6.4.1 Market Estimates & Forecast, 2022-2030	
6.4.2 Market Estimates & Forecast, by Region, 2022-2030	
7. Global Aquaculture Market, by Fish Type	
7.1 Introduction	
7.2 Fishes	
7.2.1 Market Estimates & Forecast, 2022-2030	
7.2.2 Market Estimates & Forecast, by Region, 2022-2030	
7.3 Crustaceans	
7.3.1 Market Estimates & Forecast, 2022-2030	
7.3.2 Market Estimates & Forecast, by Region, 2022-2030	
7.4 Mollusca	
7.4.1 Market Estimates & Forecast, 2022-2030	
7.4.2 Market Estimates & Forecast, by Region, 2022-2030	
7.5 Others	
7.5.1 Market Estimates & Forecast, 2022-2030	
7.5.2 Market Estimates & Forecast, by Region, 2022-2030	
8. Global Aquaculture Market, by Region	
8.1 Introduction	
8.2 North America	
8.2.1 Market Estimates & Forecast, 2022-2030	
8.2.2 Market Estimates & Forecast, by Environment, 2022-2030	
8.2.3 Market Estimates & Forecast, by Fish Type, 2022-2030	
8.2.6 US	

8.2.6.1	Market Estimates & Forecast, 2022-2030
8.2.6.2	Market Estimates & Forecast, by Environment, 2022-2030
8.2.6.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.2.7	Canada
8.2.7.1	Market Estimates & Forecast, 2022-2030
8.2.7.2	Market Estimates & Forecast, by Environment, 2022-2030
8.2.7.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.2.8	Mexico
8.2.8.1	Market Estimates & Forecast, 2022-2030
8.2.8.2	Market Estimates & Forecast, by Environment, 2022-2030
8.2.8.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.3	Europe
8.3.1	Market Estimates & Forecast, 2022-2030
8.3.2	Market Estimates & Forecast, by Environment, 2022-2030
8.3.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.3.6	Germany
8.3.6.1	Market Estimates & Forecast, 2022-2030
8.3.6.2	Market Estimates & Forecast, by Environment, 2022-2030
8.3.6.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.3.7	France
8.3.7.1	Market Estimates & Forecast, 2022-2030
8.3.7.2	Market Estimates & Forecast, by Environment, 2022-2030
8.3.7.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.3.8	Italy
8.3.8.1	Market Estimates & Forecast, 2022-2030
8.3.8.2	Market Estimates & Forecast, by Environment, 2022-2030
8.3.8.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.3.9	Spain
8.3.9.1	Market Estimates & Forecast, 2022-2030
8.3.9.2	Market Estimates & Forecast, by Environment, 2022-2030
8.3.9.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.3.8	UK
8.3.8.1	Market Estimates & Forecast, 2022-2030
8.3.8.2	Market Estimates & Forecast, by Environment, 2022-2030
8.3.8.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.3.9	Rest of Europe
8.3.9.1	Market Estimates & Forecast, 2022-2030
8.3.9.2	Market Estimates & Forecast, by Environment, 2022-2030
8.3.9.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.4	Asia-Pacific
8.4.1	Market Estimates & Forecast, 2022-2030
8.4.2	Market Estimates & Forecast, by Environment, 2022-2030
8.4.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.4.6	China
8.4.6.1	Market Estimates & Forecast, 2022-2030
8.4.6.2	Market Estimates & Forecast, by Environment, 2022-2030
8.4.6.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.4.7	India
8.4.7.1	Market Estimates & Forecast, 2022-2030
8.4.7.2	Market Estimates & Forecast, by Environment, 2022-2030
8.4.7.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.4.8	Japan
8.4.8.1	Market Estimates & Forecast, 2022-2030
8.4.8.2	Market Estimates & Forecast, by Environment, 2022-2030
8.4.8.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.4.9	Australia & New Zealand
8.4.9.1	Market Estimates & Forecast, 2022-2030
8.4.9.2	Market Estimates & Forecast, by Environment, 2022-2030
8.4.9.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.4.8	Rest of Asia-Pacific
8.4.8.1	Market Estimates & Forecast, 2022-2030
8.4.8.2	Market Estimates & Forecast, by Environment, 2022-2030
8.4.8.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.5	Rest of the World (RoW)
8.5.1	Market Estimates & Forecast, 2022-2030
8.5.2	Market Estimates & Forecast, by Environment, 2022-2030
8.5.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.5.6	South America
8.5.6.1	Market Estimates & Forecast, 2022-2030
8.5.6.2	Market Estimates & Forecast, by Environment, 2022-2030
8.5.6.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.5.7	Middle East
8.5.7.1	Market Estimates & Forecast, 2022-2030
8.5.7.2	Market Estimates & Forecast, by Environment, 2022-2030
8.5.7.3	Market Estimates & Forecast, by Fish Type, 2022-2030
8.5.8	Africa
8.5.8.1	Market Estimates & Forecast, 2022-2030
8.5.8.2	Market Estimates & Forecast, by Environment, 2022-2030
8.5.8.3	Market Estimates & Forecast, by Fish Type, 2022-2030
9.	Company Landscape
9.1	Introduction
9.2	Market Strategies
9.3	Key Development Analysis
	(Expansions/Mergers & Acquisitions/Joint Ventures/New Product Developments/Agreements/Investments)
10.	Company Profiles
10.1	American Abalone Farms
10.1.1	Company Overview
10.1.2	Financial Updates
10.1.3	Product/Business Segment Overview
10.1.4	Strategies
10.1.5	Key Developments
10.1.6	SWOT Analysis
10.2	Blue Ridge Aquaculture Inc.

- 10.2.1 Company Overview
- 10.2.2 Financial Updates
- 10.2.3 Product/Business Segment Overview
- 10.2.4 Strategies
- 10.2.5 Key Developments
- 10.2.6 SWOT Analysis
- 10.3 Cargill, Incorporated
- 10.3.1 Company Overview
- 10.3.2 Financial Updates
- 10.3.3 Product/Business Segment Overview
- 10.3.4 Strategies
- 10.3.5 Key Developments
- 10.3.6 SWOT Analysis
- 10.4 Sea Aquaculture International Ltd.
- 10.4.1 Company Overview
- 10.4.2 Financial Updates
- 10.4.3 Product/Business Segment Overview
- 10.4.4 Strategies
- 10.4.5 Key Developments
- 10.4.6 SWOT Analysis
- 10.5 Mowi ASA
- 10.5.1 Company Overview
- 10.5.2 Financial Updates
- 10.5.3 Product/Business Segment Overview
- 10.5.4 Strategies
- 10.5.5 Key Developments
- 10.5.6 SWOT Analysis
- 10.6 Cooke Aquaculture
- 10.6.1 Company Overview
- 10.6.2 Financial Updates
- 10.6.3 Product/Business Segment Overview
- 10.6.4 Strategies
- 10.6.5 Key Developments
- 10.6.6 SWOT Analysis
- 10.7 Austevoll Seafood ASA
- 10.7.1 Company Overview
- 10.7.2 Financial Updates
- 10.7.3 Product/Business Segment Overview
- 10.7.4 Strategies
- 10.7.5 Key Developments
- 10.7.6 SWOT Analysis
- 10.8 Cermaq ASA
- 10.8.1 Company Overview
- 10.8.2 Financial Updates
- 10.8.3 Product/Business Segment Overview
- 10.8.4 Strategies
- 10.8.5 Key Developments
- 10.8.6 SWOT Analysis
- 10.9 Pacific Biocontrol Corporation
- 10.9.1 Company Overview
- 10.9.2 Financial Updates
- 10.9.3 Product/Business Segment Overview
- 10.9.4 Strategies
- 10.9.5 Key Developments
- 10.9.6 SWOT Analysis
- 10.10 Charoen Pokphand Foods PCL
- 10.10.1 Company Overview
- 10.10.2 Financial Updates
- 10.10.3 Product/Business Segment Overview
- 10.10.4 Strategies
- 10.10.5 Key Developments
- 10.10.6 SWOT Analysis
- 10.11 Maruha Nichiro Corporation
- 10.11.1 Company Overview
- 10.11.2 Financial Updates
- 10.11.3 Product/Business Segment Overview
- 10.11.4 Strategies
- 10.11.5 Key Developments
- 10.11.6 SWOT Analysis
- 10.12 Dainichi Corporation
- 10.12.1 Company Overview
- 10.12.2 Financial Updates
- 10.12.3 Product/Business Segment Overview
- 10.12.4 Strategies
- 10.12.5 Key Developments
- 10.12.6 SWOT Analysis
- 10.13 Nippon Suisan Kaisha Ltd.
- 10.13.1 Company Overview
- 10.13.2 Financial Updates
- 10.13.3 Product/Business Segment Overview
- 10.13.4 Strategies
- 10.13.5 Key Developments
- 10.13.6 SWOT Analysis
- 10.14 Grieg Seafood ASA
- 10.14.1 Company Overview
- 10.14.2 Financial Updates
- 10.14.3 Product/Business Segment Overview
- 10.14.4 Strategies
- 10.14.5 Key Developments
- 10.14.6 SWOT Analysis
- 10.15 Tassal Group Ltd.
- 10.15.1 Company Overview
- 10.15.2 Financial Updates

10.15.3 Product/Business Segment Overview

10.15.4 Strategies

10.15.5 Key Developments

10.15.6 SWOT Analysis

11. Conclusion

LIST OF TABLES

TABLE 1	Global Aquaculture Market, by Region, 2022-2030 (USD Million)
TABLE 2	Global Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 3	Global Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 4	North America: Aquaculture Market, by Country, 2022-2030 (USD Million)
TABLE 5	North America: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 6	North America: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 7	US: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 8	US: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 9	Canada: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 10	Canada: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 11	Mexico: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 12	Mexico: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 13	Europe: Aquaculture Market, by Country, 2022-2030 (USD Million)
TABLE 14	Europe: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 15	Europe: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 16	Germany: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 17	Germany: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 18	France: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 19	France: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 20	Italy: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 21	Italy: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 22	Spain: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 23	Spain: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 24	UK: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 25	UK: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 26	Rest of Europe: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 27	Rest of Europe: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 28	Asia-Pacific: Aquaculture Market, by Country, 2022-2030 (USD Million)
TABLE 29	Asia-Pacific: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 30	Asia-Pacific: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 31	China: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 32	China: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 33	India: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 34	India: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 35	Japan: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 36	Japan: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 37	Australia & New Zealand: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 38	Australia & New Zealand: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 39	Rest of Asia-Pacific: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 40	Rest of Asia-Pacific: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 41	Rest of the World (RoW): Aquaculture Market, by Country, 2022-2030 (USD Million)
TABLE 42	Rest of the World (RoW): Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 43	Rest of the World (RoW): Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 44	South America: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 45	South America: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 46	Middle East: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 47	Middle East: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
TABLE 48	Africa: Aquaculture Market, by Environment, 2022-2030 (USD Million)
TABLE 49	Africa: Aquaculture Market, by Fish Type, 2022-2030 (USD Million)
LIST OF FIGURES	
FIGURE 1	Global Aquaculture Market Segmentation
FIGURE 2	Forecast Research Methodology
FIGURE 3	Five Forces Analysis of the Global Aquaculture Market
FIGURE 4	Value Chain of the Global Aquaculture Market
FIGURE 5	Share of the Global Aquaculture Market in 2022, by Country (%)
FIGURE 6	Global Aquaculture Market, by Region, 2022-2030
FIGURE 7	Global Aquaculture Market Size, by Environment, 2022
FIGURE 8	Share of the Global Aquaculture Market, by Environment, 2022-2030 (%)
FIGURE 9	Global Aquaculture Market Size, by Fish Type, 2022
FIGURE 10	Share of the Global Aquaculture Market, by Fish Type, 2022-2030 (%)