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Global Aquaculture Supplies & Equipment

September 2018



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About This Report

Scope

This report forecasts to 2022 global demand for aquaculture supplies and equipment by product, market, and major world region in nominal US dollars at the retail level (i.e., the prices paid by fish farmers). Product segments include:

- aquafeed
- equipment
- chemicals

Reported markets encompass:

- hatcheries
- grow-out aquaculture

Major world regions include Asia/Pacific, Americas, Europe, and Africa/Mideast.

To illustrate historical trends, world, product, market, and regional demand (including product and market segments) are provided for 2007, 2012, and 2017. Finally, global aquaculture production is segmented by major world region in metric tons and provided for 2007, 2012, 2017, and 2022.

Hatchery demand figures reflect supplies and equipment demand for fish farms with hatchery operations only; farms that produce fry, fingerlings, and adults are included in grow-out aquaculture.

Aquaculture production figures only include finfish and shellfish aquaculture and exclude production of aquatic plants, aquatic non-fish animals, and aquatic animal products. Volume production figures represent whole-fish volumes before processing.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2017.

Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Global Aquaculture Supplies & Equipment (FW35076) is based on a [comprehensive industry study](#) published by The Freedonia Group. Reported findings represent the synthesis and

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analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 10 | NAICS & SIC Codes Related to Aquaculture Supplies & Equipment

| NAICS/SCIAN 2007 | | SIC | |
|---|--|------------------------------------|--|
| North American Industry Classification System | | Standard Industrial Classification | |
| 311119 | Other Animal Food Manufacturing | 2048 | Prepared Feed and Feed Ingredients for Animals and Fowls, Except Dogs and Cats |
| 311710 | Seafood Product Preparation and Packaging | 2077 | Animal and Marine Fats and Oils |
| 314999 | All Other Miscellaneous Textile Product Mills | 2812 | Alkalies and Chlorine |
| 325180 | Other Basic Inorganic Chemical Manufacturing | 2819 | Industrial Inorganic Chemicals, NEC |
| 325998 | All Other Miscellaneous Chemical Product and Preparation Manufacturing | 2843 | Surface Active Agents |
| 332420 | Metal Tank (Heavy Gauge) Manufacturing | 2869 | Industrial Organic Chemicals, NEC |
| 333319 | Other Commercial & Service Industry Machinery Manufacturing | 2899 | Chemicals and Chemical Preparations, NEC |
| 334514 | Totalizing Fluid Meter and Counting Device Manufacturing | 3559 | Special Industry Machinery, NEC |
| | | 3589 | Service Industry Machinery, NEC |
| | | 3824 | Totalizing Fluid Meters and Counting Devices |
| | | 9511 | Air and Water Resource and Solid Waste Management |

Source: US Census Bureau

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Table 11 | HS Codes Related to Aquaculture Supplies & Equipment

| HS Code | Definition |
|----------|---|
| 0301 | Live fish |
| 0306 | Crustaceans, whether in shell or not, live, fresh, chilled, frozen, dried, salted or in brine |
| 0307 | Molluscs, whether in shell or not, live, fresh, chilled, frozen, dried, salted, or in brine |
| 11090010 | Wheat gluten, whether or not dried to be used as animal feed |
| 1504 | Fats and oils and their fractions, of fish or marine mammals |
| 2301 | Flours, meals, and pellets, of meat or meat offal, of fish or of crustaceans, molluscs or other aquatic invertebrates |
| 2308 | Vegetable materials and vegetable waste, vegetable residues and byproducts, whether or not in the form of pellets, of a kind used in animal feeding, not elsewhere specified or included |
| 23099070 | Preparations, with a basis of vitamin B12, for supplementing animal feed |
| 2833 | Sulfates; alums; peroxosulfates (persulfates) |
| 2835 | Phosphinates (hypophosphites), phosphonates (phosphites) and phosphates; polyphosphates, whether or not chemically defined |
| 2841.70 | Molybdates |
| 28470020 | Hydrogen peroxide, whether or not solidified with urea |
| 29332100 | Hydantoin and its derivatives |
| 38089930 | Formulated biocides based on 2-methyl-4-isothiazolin-3-one, or 2-n-octyl-4-isothiazolin-3-one, or 4,5-dichloro-2-n-octyl-4-isothiazolin-3-one, or mixtures of 5-chloro-2-methyl-4-isothiazolin-3-one and 2-methyl-4-isothiazolin-3-one; and Metaldehyde |
| 5608 | Knotted netting of twine, cordage or rope; made up fishing nets and other made up nets, of textile materials |
| 8413 | Pumps for liquids, whether or not fitted with a measuring device; liquid elevators; part thereof |
| 842121 | Machinery for filtering or purifying water |

Source: United Nations Statistics Division

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

About This Report

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Aquaculture: Feed, Equipment, & Chemicals, September 2018

Freedonia Industry Studies

Industrial & Institutional (I&I) Cleaning Chemicals in the US, July 2018

Global Industrial Enzymes Market, January 2018

Global Water Filtration Equipment Markets, November 2017

Global Water Disinfection Equipment Market, August 2017

Global Water Treatment Chemicals Market, June 2017

Global Filters Market Forecast, March 2017

Agricultural Pesticide Market in the US, January 2017

Global Air & Fluid Filters Market, January 2017

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Water Disinfection Equipment: United States

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Aquaculture North America

The Fish Site

SeafoodSource

Undercurrent News

World Fishing & Aquaculture

Agencies & Associations

Asian Fisheries Society

European Aquaculture Society

Global Aquaculture Alliance

National Aquaculture Association

Network of Aquaculture Centres in Asia-Pacific

Ohio Aquaculture Association

United Nations Food & Agricultural Organisation

World Aquaculture Society