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World Aquaculture: Feed, Equipment & Chemicals

Industry Study with Forecasts for **2009 & 2014**

Study #2680 | October 2010 | \$5800 | 349 pages

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The expansion of aquaculture production combined with increasingly intensive production practices will be the primary drivers for growth in aquaculture supplies and equipment demand.

World demand to rise 11.6% annually through 2014

The world market for aquaculture supplies and equipment is expected to continue to register rapid growth, increasing 11.6 percent per year to \$35.5 billion in 2014. The expansion of aquaculture production combined with increasingly intensive production practices will be the primary drivers for advances. Aquaculture production is increasingly important in meeting global fish demand and is expected to make up 40 percent of the total fisheries output by 2014.

Limited area for aquaculture to intensify demand

Globally, the area available for aquaculture is facing competing uses from agriculture, tourism, recreational and residential development. With land being a major factor limiting aquaculture growth, employing higher stocking densities and thereby intensification of culture practices will become more prevalent. This will require the greater use of commercially produced feeds, water treatment products, feed additives, fertilizers and vaccines.

Asia/Pacific region to remain dominant

From a regional perspective, the Asia/Pacific region will continue to dominate both aquaculture production and demand for aquaculture supplies and

World Aquaculture Supplies & Equipment Demand, 2009 (\$20.5 billion)



photo: Blausee Fish Farm

equipment, with double-digit gains only slightly below the much smaller Africa/Mideast market. China alone will account for over half of all global volume demand in 2014.

Aquafeed to remain dominant segment, lead gains

Aquafeed dominates sales of supplies and equipment due to its essential nature in aquafarming operations. Aquafeed demand is forecast to grow 13.0 percent per year to \$29.5 billion in 2014 due to increasing volume requirements as well as an increase in feed prices owing to tight global supplies of fishmeal and fish oil. Aquaculture equipment demand will grow 6.0 percent

annually as increasing numbers of farms move toward mechanization with rearing units such as net pens, tanks and water treatment equipment such as aerators, filtration devices and pumps seeing increased use. Aquaculture chemicals and biologicals annual demand growth will be strong at 8.2 percent with water treatment products -- such as disinfectants, biologicals, lime, minerals and zeolites -- representing the largest product subcategory. Growth will be spurred by the pressing demand for maintaining water quality. Feed additives will see the fastest advances in demand among all chemical and biological products, resulting from increased attention to improving feed efficiencies and reducing feed costs.

Sample Text, Table & Chart

ASIA/PACIFIC

Bangladesh: Aquaculture Supplies & Equipment

Aquaculture production in Bangladesh has steadily in good growth is expected in the next five years. Demand for supplies and million in 2009. Demand for other inputs as clusters of aquaculture in the eastern region of the country and for their quality efficiency.

SAMPLE TEXT

Feed requirements for aquaculture supplies and equipment, and rapidly at per year to \$1.5 billion in Bangladesh. kinds of feed -- commercial feeds made by established reg companies, commercial feeds made by small local feed m rice mill-made feeds and finally farm-made feeds. The eff these various feeds varies with the FCR of the first group 1.90 while that from the last two groups being around 2.2. commercial feeds have a higher unit price, the savings the the long term is driving many farmers to demand more of such feeds, especially as they move toward semi-intensive and intensive farming. While extensive and many semi-intensive farmers still rely on fertiliza- tion and the natural pond productivity with limited supplementary feed- ing, the small number of intensive fish farmers use industrial feeds and accounted for over 55 percent of the total aquafeed used in the country in 2009. This portion is likely to increase in the forecast period. The increasing demand for formulated aquafeeds will result in the ment of dedicated feed companies. Presently there are few aquafeed manufacturers in the country. Most of the manufac involved in the production and supply of feeds for finfish cul large portion of the shrimp feed is imported from countries l Taiwan, Japan, the United States and countries in Europe. A the development of the industrial feed sector, there has also

TABLE V-20

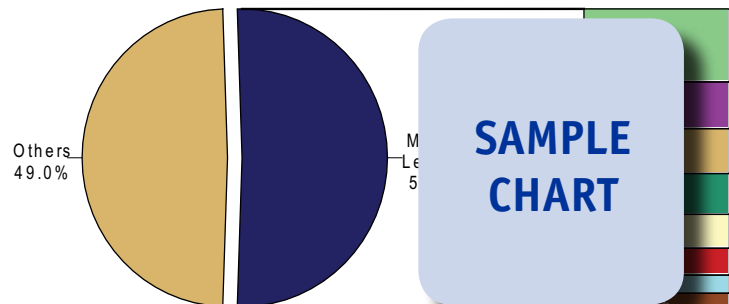
BANGLADESH: AQUACULTURE PRODUCTION (thousand metric tons)

Item	1999	2004	2009	2014	2019
Bangladesh Fisheries Production % aquaculture	15	17	18	19	20
Bangladesh Aquaculture Production					
Finfish:					
Carp					
Tilapia					
Salmon & Trout					
Catfish					
Other Finfish					
Shellfish:					
Oysters					
Clams					
Shrimp & Prawns					
Other Shellfish					
\$/kg					
Bangladesh Aquaculture Production (mil \$)					
% Bangladesh					
Asia/Pacific Aquaculture Prdn (mil \$)350					100

SAMPLE TABLE

CHART VII-1

WORLD AQUAFEED MARKET SHARE, 2009 (\$12.8 billion)



SAMPLE CHART

Sample Profile, Table & Forecast

TABLE V-21
BANGLADESH: AQUACULTURE SUPPLIES & EQUIPMENT DEMAND (million dollars)

Item	1999	2004	2009	2014	2019
Bangladesh Aquaculture Prdn (000 m to					50
\$ supplies & equipment/kg aquacultur					48
Bangladesh Aquaculture Supplies/Equip					20
Feed					20
Equipment					50
Chemicals & Biologicals:					30
Water Treatment					20
Feed Additives					4
Fertilizers					3
Pharmaceuticals					3



COMPANY PROFILES

Biostadt India Limited
 Poonam Chambers
 A Wing, 6th Floor
 Dr AB Road, Worli
 Mumbai 400018
 India
 91-22-66
 http://wv

SAMPLE PROFILE

Annual S
 Employr

Key Pro... and other shrimp
 and fish

Biostadt india is a producer of biological and biotechnology-based agricultural inputs, crop protection chemicals, hybrid seeds, aquaculture products and pharmaceuticals. The privately held company is focused on serving the farming community in rural India; however, Biostadt India also has operations elsewhere in the Asia/Pacific region and in Europe.

The Company participates in the world aquaculture supplies and equipment industry through the manufacture and sale of chemicals, probiotics, feed additives and other products used in shrimp and fish farming. Biostadt India makes chemicals used to manage shrimp and fish pond conditions, and aid in disease prevention and treatment. Among these products are disinfectants for shrimp ponds, including BLESSON products, which are designed to eliminate zoothannmium, a microorganism that affects shrimp skin molting; BROOT 5X bromine compounds; MIZUPHOR iodine complexes; WOLMID products which are used to control pathogenic bacteria, fungi, viruses and harmful

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“Aquaculture equipment represents the second biggest category of products and its demand is predicted to increase 8.6 percent annually to \$130 million in 2014. Feeding equipment and aerators will see increasing demand as more farmers use commercial feeds and move toward intensive farming.”

--Section VII, pg. 140

OTHER STUDIES

Enzymes

US demand for enzymes will rise 4.8% annually to 2014. Gains will be driven by continued expansion of higher-value specialty enzymes in pharmaceuticals, diagnostics, research and biotechnology, and biocatalysts. In the biofuels segment, growth will moderate as the industry transitions to cellulases for producing biomass ethanol. This study analyzes the \$2.2 billion US enzymes industry, with forecasts for 2014 and 2019 by market and product. It also evaluates company market share and profiles industry competitors.

#2670 September 2010..... \$4900

Vaccines

US demand for vaccines will advance 5.6% annually through 2014, driven by the development of new vaccines to treat complex human diseases, such as cancer. Public health recommendations for adult and adolescent immunization will produce continued strong sales in this segment, which has reached the level of pediatric vaccines sales. This study analyzes the \$10.8 billion US vaccines industry, with forecasts for 2014 and 2019 by product. It also evaluates company market share and profiles US industry competitors.

#2667 August 2010..... \$4700

World Agricultural Equipment

Global demand for agricultural equipment will rise 4.5% per year to 2014, paced by the accelerating mechanization of the farm sectors in developing countries. Replacement demand will define the industrialized world, led by "precision agriculture" equipment that use GPS and wireless sensors. This study analyzes the \$99.2 billion world agricultural equipment industry, with forecasts for 2014 and 2019 by type, world region and for 26 countries. It also evaluates company market share and profiles industry participants.

#2666 August 2010..... \$5900

World Nutraceutical Ingredients

Global nutraceutical ingredient demand will rise 6.2% yearly through 2013. China and India will be the fastest growing markets while the US remains the largest. Best prospects include soy proteins; additives lutein and lycopene; vitamins A and E; minerals calcium and magnesium; and extracts ginkgo biloba and glucosamine. This study analyzes the \$16 billion world nutraceutical ingredient industry, with forecasts for 2013 and 2018 by product, world region and for 12 countries. It also details market share and profiles industry players.

#2565 November 2009..... \$5800

World Water Treatment Products

Global water treatment product demand will rise 5.7% yearly through 2013. Large developing markets such as China and India will grow the fastest. Gains in developed areas will be based on efforts to increase water reuse, improve the aesthetic quality of drinking water and further reduce water contamination. This study analyzes the \$44.6 billion world water treatment product industry, with forecasts for 2013 and 2018 by product, market, world region and for 23 countries. It also evaluates market share and profiles industry players.

#2563 November 2009..... \$6100

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