

Next-Generation Aquaculture/Fish Farming Market in Japan: Key Research Findings 2017

◆ **Research Outline**

Yano Research Institute has conducted a study on the domestic next-generation aquaculture/fish farming market with the following conditions:

1. Research period: June 2017 to January 2018
2. Research objects: Market players developing next-generation aquaculture/fish farming technologies (i.e., smart aquaculture, land-based aquaculture/fish farming, or low fishmeal feed), companies developing aquaculture/fish farming business, other related organizations including universities, government and municipal offices, R&D institutions, and etc.
3. Research methodologies: Face-to-face research by the expert researchers, surveys via telephone/email, and literature research

What are Next-Generation Aquaculture/Fish Farming Technologies?

The next-generation aquaculture/fish farming technologies in this research indicate the three categories of technologies, i.e., 1) smart aquaculture, 2) land-based aquaculture/fish farming, and 3) low fishmeal feed. The definitions of each category are as follows:

- 1) Smart Aquaculture: More efficient fishery with the use of ICT to “visualize (digitalize)” the development, than the traditional way of relying on “intuition” or “experience”
- 2) Land-based Aquaculture/Fish Farming: aquaculture (fish farming) developed in artificial environments constructed on land
- 3) Low Fishmeal Feed: Fishmeal feed made of low fish ratio of 50% or less

What is the Next-Generation Aquaculture/Fish Farming Market?

The next-generation aquaculture/fish farming market size in this research indicates the domestic market calculated based on the sales of enterprises developing the business of 1) smart aquaculture, 2) land-based aquaculture/fish farming, or 3) low fishmeal feed.

◆ **Key Findings**

■ **Domestic Market Size of Next-Generation Aquaculture/Fish Farming Technologies (Smart Aquaculture, Land-Based Aquaculture/Fish Farming, Low Fishmeal Feed) in FY2016 Attained 13,275 Million Yen**

The domestic market size of the next-generation aquaculture/fish farming technologies (i.e., smart aquaculture, land-based aquaculture/fish farming, and low fishmeal feed) has attained 13,275 million yen. The details of the market size are as follows: Land-based aquaculture/fish farming (total of both fish culture using freely-flowing water system and closed recirculating system) reaching 3,950 million yen and low fishmeal feed attaining 9,325 million yen. With regard to smart aquaculture, because it has mainly been in the demonstration period, the market is regarded to be hardly established yet.

■ **Domestic Market Size of Next-Generation Aquaculture/Fish Farming Technologies (Smart Aquaculture, Land-Based Aquaculture/Fish Farming, Low Fishmeal Feed) Projected to Reach 20,320 Million Yen by FY2021**

The domestic market size of the next-generation aquaculture/fish farming technologies (i.e., smart aquaculture, land-based aquaculture/fish farming, and low fishmeal feed) is projected to achieve 20,320 million yen. The details of the market size are as follows: Smart aquaculture is expected to attain 1,260 million yen, land-based aquaculture/fish farming (total of both fish culture systems using freely-flowing water and closed recirculating water) to achieve 8,048 million yen due to wide acceptance of closed recirculating system, and low fishmeal feed expected to expand to 11,012 million yen.

◆ **Report Format:**

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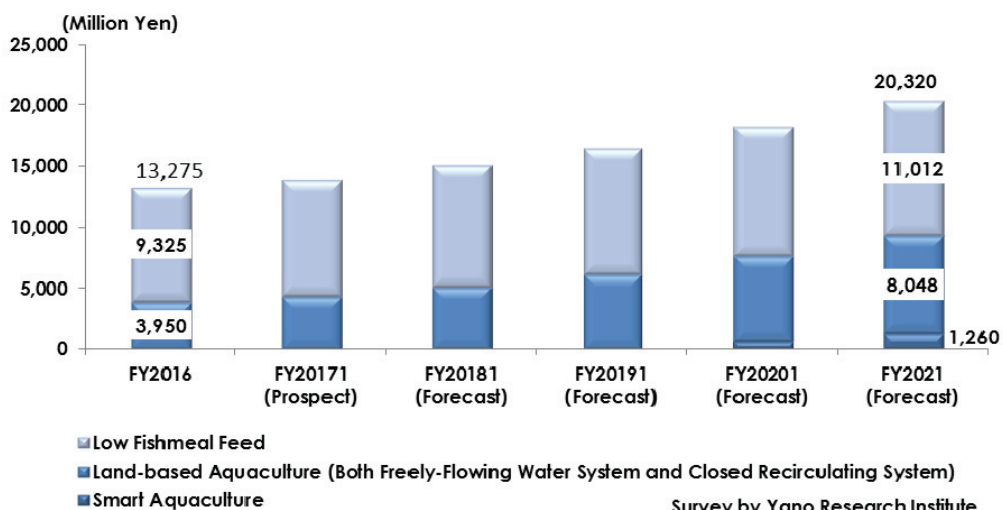
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■ **Figure 1: Transition and Forecast of Domestic Market Size of Next-Generation Aquaculture/Fish Farming Technologies (Smart Aquaculture, Land-Based Aquaculture/Fish Farming, Low Fishmeal Feed)**



Notes:

1. The market size is based on the sales of enterprises.