UAE Aquaculture - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 126 pages | Mordor Intelligence

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Report description:

UAE Aquaculture Market Analysis

The UAE aquaculture market was valued at USD 23.41 billion in 2025 and estimated to grow from USD 24.42 billion in 2026 to reach USD 30.14 billion by 2031, at a CAGR of 4.31% during the forecast period (2026-2031). The market's growth is driven by food security initiatives, government capital support programs, and increasing demand for premium food services, particularly as natural fisheries face constraints. The Environment Agency Abu Dhabi (EAD) reported that aquaculture production in Abu Dhabi reached 367 metric tons of aquatic organisms in 2023, indicating significant production capacity growth. The adoption of recirculating aquaculture systems, biosecurity subsidies, and offshore cage zoning has improved operational efficiency and attracted private investment. Abu Dhabi Developmental Holding Company PJSC, KEZAD Group, and international partners have implemented advanced technology and knowledge transfer programs, while mandatory bio-floc system upgrades address concerns related to water scarcity. The market faces challenges, including high operating costs due to high salinity levels, limited broodstock diversity, and dependence on imported feed, which affect profit margins and restrict the growth of small operators.

UAE Aquaculture Market Trends and Insights

Growing Domestic Seafood Demand

The United Arab Emirates' food consumption is projected to grow at 3.5% annually, reaching 10.3 million metric tons by 2030, driven by increasing per-capita consumption and population growth, according to the Ministry of Economy. The country's position

as a regional trade hub enhances demand through re-export activities, with 70% of imported seafood being redistributed to neighboring markets. The corporate catering and institutional food service segments present growth opportunities, driven by government initiatives that mandate local food procurement in schools, hospitals, and military facilities. These initiatives create consistent demand volumes, supporting investments in production capacity. The United Arab Emirates's Vision 2071 food security program emphasizes domestic protein production by requiring government institutions to source specific percentages of their food from local suppliers, establishing protected market segments for domestic aquaculture producers.

Government-Backed Biosecurity Subsidies

In 2024, the Abu Dhabi Investment Office allocated AED 2 billion (USD 0.54 billion) to the AgriFood Growth and Water Abundance program. The program provides grants for disease-monitoring laboratories, quarantine facilities, and biosecurity infrastructure upgrades, including disease surveillance systems at AD Ports Group. The financial incentives help companies meet the high capital requirements for international food safety standards compliance, specifically ISO 22000 and Hazard Analysis and Critical Control Points (HACCP) certifications, which are essential for accessing export markets. The subsidy structure encourages the adoption of technologies such as real-time pathogen detection systems, AI-powered behavioral monitoring, and automated feed management systems, thereby improving production efficiency and reducing disease risks. Companies such as Emirates Aquatech have used these programs to implement ozone disinfection systems across 64 recirculating aquaculture system units, showing the extent of infrastructure investment supported by government programs.

High Salinity Operating Costs

The United Arab Emirates' arid climate and limited freshwater resources create operational challenges for aquaculture operations. Groundwater salinity levels frequently exceed 45,000-50,000 parts per million, compared to typical seawater concentrations of 35,000 ppm. This hypersalinity necessitates desalination infrastructure for freshwater species production. Reverse osmosis systems consume 3-5 kWh per cubic meter of treated water and generate 1.5-2 liters of concentrated brine for every liter of freshwater produced. Some areas experience salinity increases of 50% above natural levels, while thermal pollution from desalination plants affects marine ecosystems. Energy costs for desalination account for 25-35% of total operational expenses in inland recirculating aquaculture system facilities, with brine disposal requiring additional environmental compliance measures and infrastructure.

Other drivers and restraints analyzed in the detailed report include:

Gradual Phase-Out of Wild-Catch QuotasMandatory Farm Bio-Floc UpgradesScarce Hatchery Broodstock Lines

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Freshwater fish captured 27.62% of the UAE aquaculture market share in 2025, driven by tilapia systems that integrate hydroponic vegetable production and achieve 90% water savings compared to open-pond systems. Major integrated farms in Al Ain produce over 200,000 tilapia units annually, supplying major retail chains and institutional buyers. The farms maintain stable margins through cost-efficient measures such as solar-powered pumps and in-house hatcheries, despite dependence on imported feed. Government support for food security initiatives sustains this segment, though growth may moderate due to maturing capacity and increasing demand for marine species. While low import tariffs on chilled tilapia persist, domestic producers maintain premium pricing through freshness advantages and halal certification. The segment's environmental performance supports the UAE's climate objectives, securing public-sector grants and maintaining its market position.

Mollusks are projected to grow at a 5.23% CAGR from 2026 to 2031, representing the fastest growth in the UAE aquaculture market. Dibba Bay Oysters produces 4.5 million oysters yearly, serving fine-dining establishments within 48 hours and demonstrating successful commercial operations in local conditions. The segment's advantages include minimal feed requirements, natural water filtration benefits, and shell waste recycling opportunities. The sector's export potential benefits from Emirates SkyCargo's network, enabling live product delivery within 10 hours to premium markets. Research grants awarded to scallop pilot farms in Fujairah in 2025 indicate expansion beyond oyster production. While disease management is less complex than finfish, enhanced biosecurity protocols for harmful algal blooms necessitate advanced monitoring systems.

The UAE Aquaculture Market Report is Segmented by Species (Pelagic Fish, Demersal Fish, Freshwater Fish, Crustaceans, Mollusks, and Other Species). The Report Includes Production Analysis (Volume), Consumption Analysis (Volume and Value), Import Analysis (Volume and Value), Export Analysis (Volume and Value), and Price Trend Analysis. The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

List of Companies Covered in this Report:

Market Overview Market Drivers Market Restraints Regulatory Landscape Technological Outlook Value Chain/Supply Chain Analysis PESTLE Analysis List of Stakeholders

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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