

FY2024

White Paper on Fisheries

Summary

June 2025

Fisheries Agency

- The figures stated in this document are, in principle, rounded. For that reason, the totals of these figures may not match the stated totals, etc.
- The maps shown in this document do not necessarily represent the territory of Japan in a comprehensive manner.
- In order to indicate the relationship between fisheries and SDGs, the icon of the goal that has a particularly deep connection with fisheries is attached. Please note that not all related icons are attached.

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FY2025 Fisheries Policy

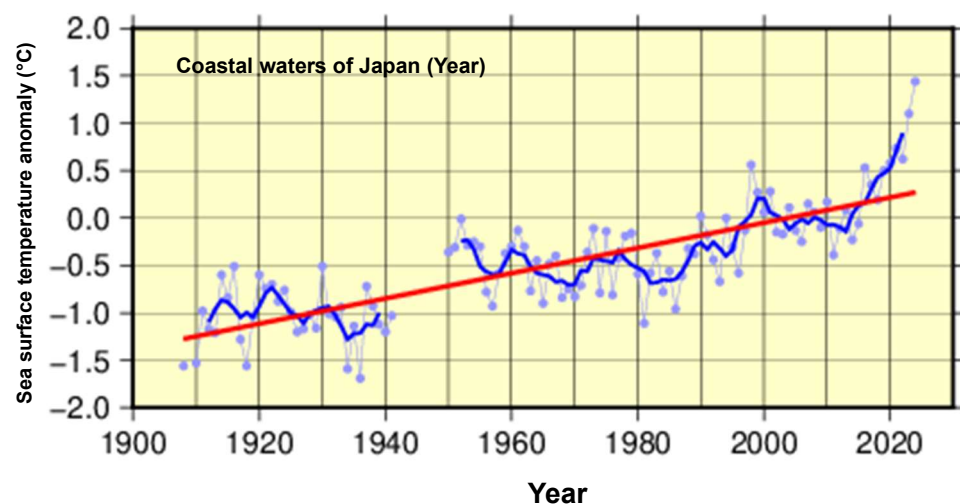
Special Issue Impact of Changes in the Marine Environment on the Fisheries Industry and Countermeasures



Section 1 Status of Changes in the Marine Environment

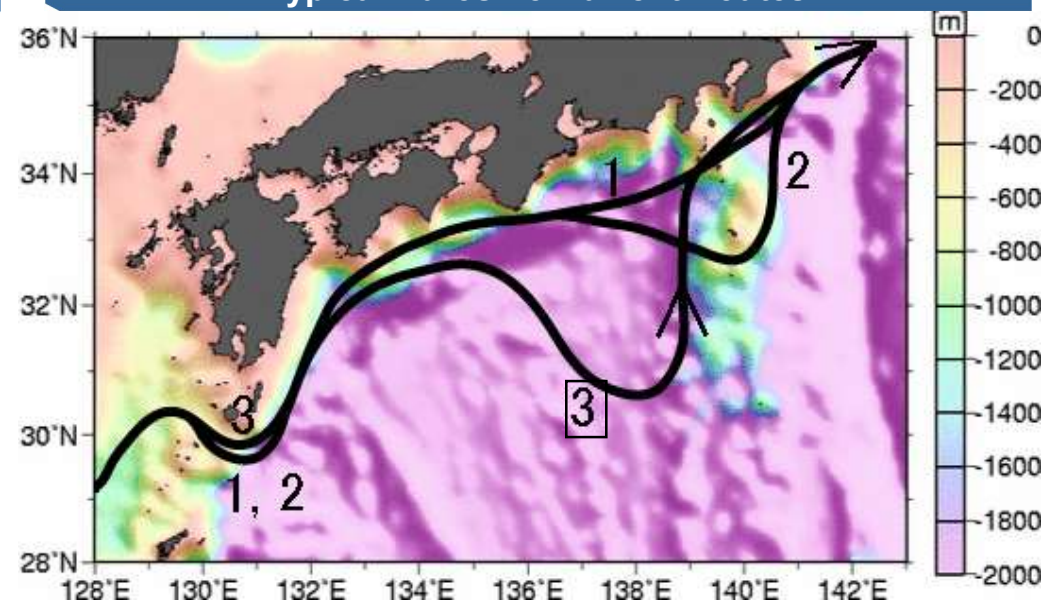
- In 2024, the average sea surface temperature in the coastal waters of Japan was the highest ever recorded.
- Over the approximately 100 years leading up to 2024, the annual average sea surface temperature in the coastal waters of Japan increased by $+1.33^{\circ}\text{C}$ per 100 years, which is more than twice the global rate ($+0.62^{\circ}\text{C}$ per 100 years) and the rate in the North Pacific ($+0.65^{\circ}\text{C}$ per 100 years).
- The occurrence of marine heatwaves around Japan has become notably prominent since around 2010.
- The Kuroshio large meander has persisted since 2017, marking an unprecedented duration. This continuation has led to rising sea surface temperatures off the Kanto and Tokai regions, where the Kuroshio Current nears the coast. Additionally, the northward shift of the Kuroshio Extension has caused record-high temperatures in the waters off the Sanriku coast since autumn 2022.

Trends in Average Sea Surface Temperature in the Coastal Waters of Japan



Source: Excerpts from Long-Term Changes in Sea Surface Temperature (around Japan) (Japan Meteorological Agency)
 Note: The blue dots in the figure represent anomaly for each year, and the thick blue solid line shows the 5-year moving average. The thick red solid line indicates the long-term trend.

Typical Kuroshio Current Routes



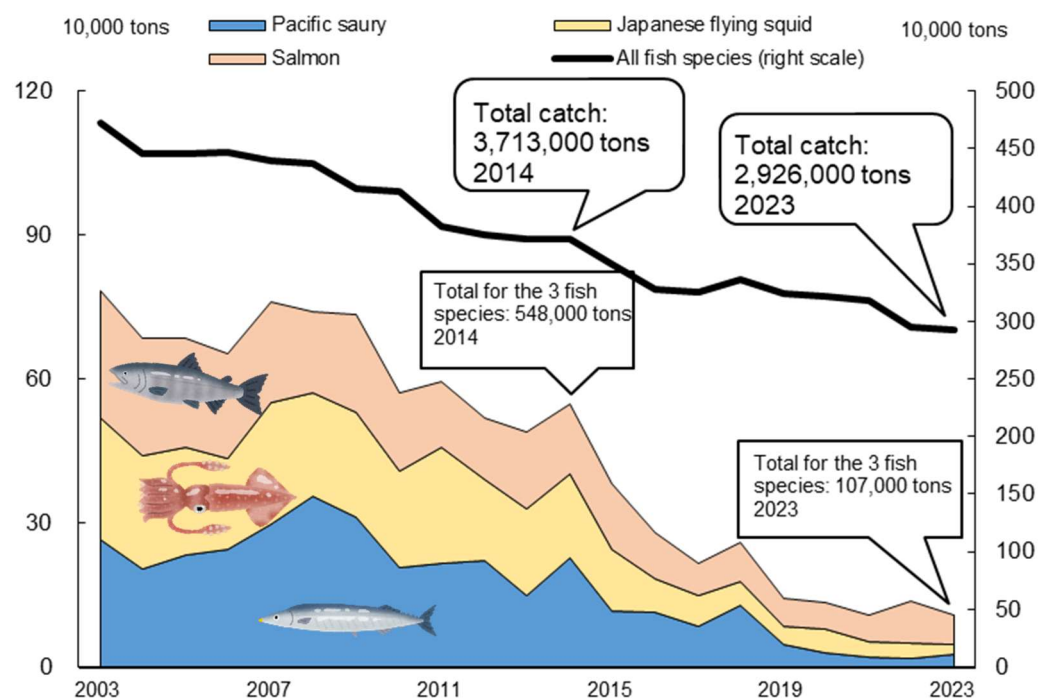
1: Non-large meander path 2: Offshore non-large meander path 3: Large meander path

Source: Changes in the Kuroshio Current spanning Several Months to Decades (Routes) (Japan Meteorological Agency)

Section 2 Impacts of Changes in the Marine Environment on Fisheries Resources and Industry

- Rising sea temperatures and changes in ocean currents are altering the distribution and stock status of fish and shellfish, and significantly impacting fisheries business management through declining landing volumes, higher fuel and other costs as fishing grounds move further offshore, and the suspension of fishing operations.
- In particular, the catches of Pacific saury, Japanese flying squid, and salmon have declined markedly in recent years.

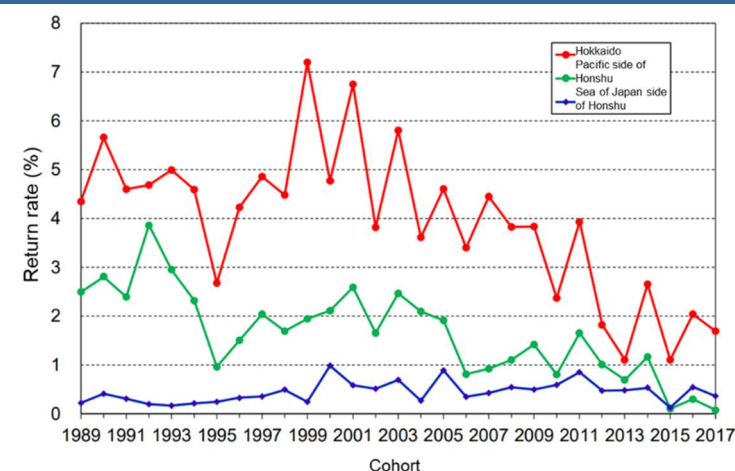
Trends in Catches of Pacific Saury, Japanese Flying Squid, and Salmon



Source: Statistics on Fishery and Aquaculture Production (Ministry of Agriculture, Forestry and Fisheries)

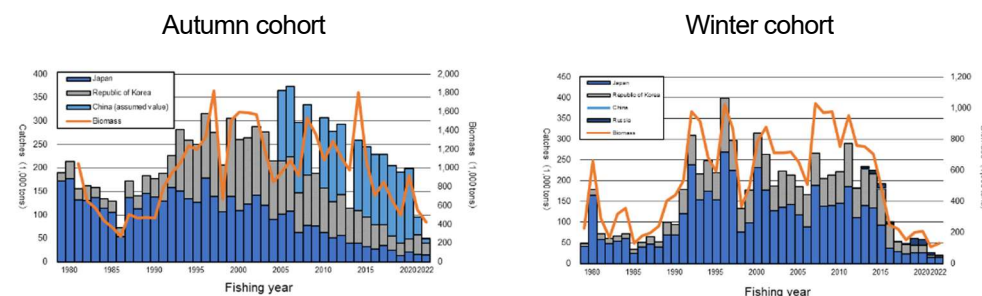
Note: For Japanese flying squid, catches from any region other than the waters of the Sea of Japan by distant water trawl fishery (southern waters) and squid jigging fishery are not included.

Trends in the Return Rate of Salmon in Various Parts of Japan



Source: Status of International Fishery Resources in FY2024 (Japan Fisheries Research and Education Agency)

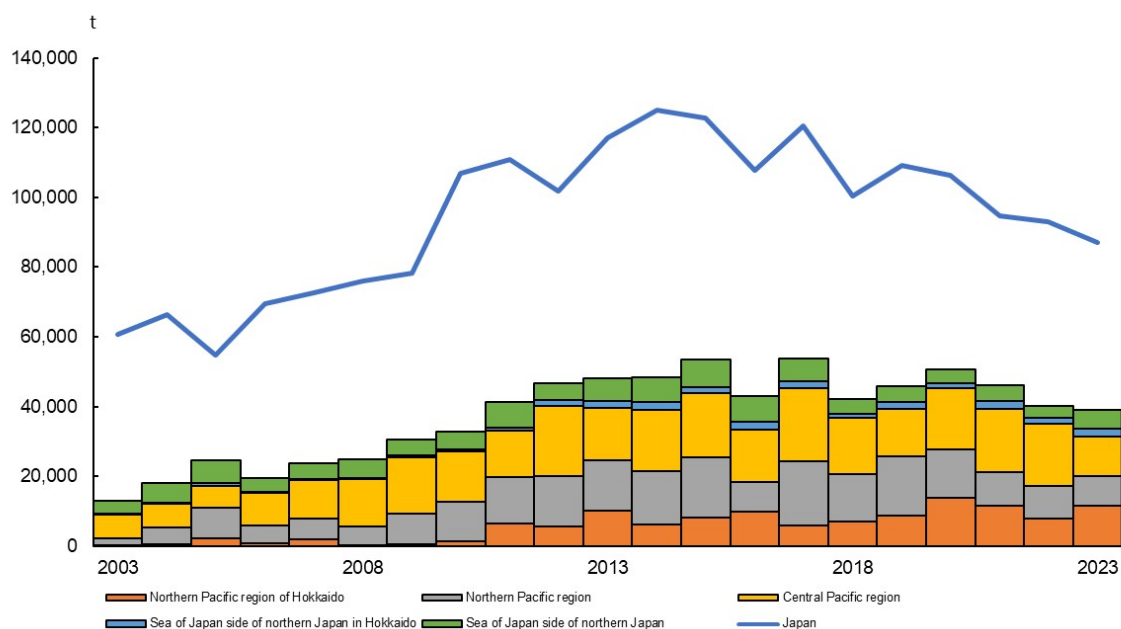
Trends in Stock Status and Catches of Japanese Flying Squid



Source: Prepared by the Fisheries Agency based on the Assessment of Fisheries Resources in the Waters Around Japan (Fisheries Agency and Japan Fisheries Research and Education Agency)

- In the coastal waters of Japan, rising sea temperatures have led fish species that prefer warmer waters to expand their habitats and migration routes northward, while the abundance of fish species that prefer colder waters—such as salmon—has declined, as fewer are migrating southward to waters around Japan.
- Catches of yellowtail have increased since the 1990s. After reaching a record high of approximately 130,000 tons in 2014, they have stabilized at around 90,000 tons in recent years. Notably, recent years have seen a significant increase in catches in Hokkaido and the northern and central Pacific Ocean.
- Regarding nori seaweed cultivation, high water temperatures in autumn are suspected to be one of the causes of a decrease in harvest due to delays in the start of production and shorter cultivation periods, poor growth, and other factors. Damage to nori seaweed has also intensified due to increased feeding by herbivorous fish species, such as mottled spinefoot and Japanese black bream, whose distribution has expanded. This has been compounded by a delay in the decline of seawater temperatures in autumn, which has further stimulated their feeding activity.
- As the distribution of certain fish species has shifted, there have been confirmed cases of these newly caught species being traded at low prices. This is partly due to the absence of a cultural tradition of consuming these species and the lack of established distribution channels.
- In recent years, the decline of seaweed beds due to high water temperatures and feeding damage has been highlighted. This decline has led to a reduction in the catches of marine organisms such as Japanese spiny lobsters and abalone, which depend on seaweed beds as habitats or feeding grounds.

Trends in Catches of Yellowtail by Sea Area

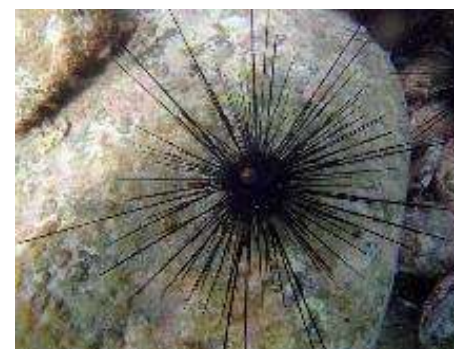


Source: Statistics on Fishery and Aquaculture Production (Ministry of Agriculture, Forestry and Fisheries)

Main herbivores that cause the decline of seaweed beds



Mottled spinefoot



Long-spined urchin

Section 3 Initiatives to Respond to Changes in the Marine Environment

(1) Initiatives in Fishery and Aquaculture Industries

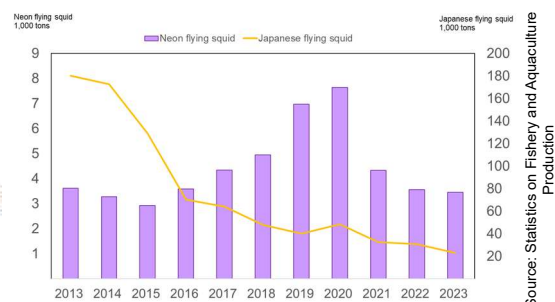
- For highly specialized fisheries—where target fish species and operation periods are limited—fisheries business management is greatly impacted by significant reductions in landings caused by poor catches of target species, as well as rising fuel costs resulting from fishing grounds shifting further offshore.
- Management bodies engaged in coastal fisheries—employing multiple fishing methods and target fish species according to the season—are facing the challenge of declining income due to poor catches of key fish species.
- Initiatives to address changes in the marine environment—such as shifting to more accessible resources and integrating traditional fishing methods with newly introduced methods—are underway in various regions of Japan.
- In nori seaweed cultivation, initiatives include introducing varieties with greater tolerance to high water temperatures and faster growth rates, as well as enclosing nori nets with protective coverings to reduce feeding damage.

Case example: Start of neon flying squid fishing operations by squid fishing vessels following decline in Japanese flying squid catches (Aomori and other prefectures)

- Following a decline in the stock of Japanese flying squid, squid fishing vessels in Hachinohe, Aomori Prefecture, and other areas are shifting to resume fishing operations targeting neon flying squid in the central Pacific Ocean, where stable catches are anticipated.
- The price of neon flying squid is rising as its use expands from processed food ingredients to raw consumption, such as in sushi. Fishers engaged in the harvesting of neon flying squid earn a significant portion of their revenue from this source.
- Neon flying squid fishing operations face challenges such as rising fuel costs due to distant fishing grounds and the need to improve operational efficiency.



Neon flying squid



Trends in Landing Volumes of Neon Flying Squid and Japanese Flying Squid

Case example: Initiatives for salmon aquaculture by salmon fixed net fishers (Iwate Prefecture)

- Catches from fixed net fisheries targeting salmon have declined significantly due to a sharp decrease in salmon migrating to Honshu.
- To supplement income from fixed net fishery, salmon and trout aquaculture initiatives are being actively promoted across Iwate Prefecture.
- Combining fixed net fishing with aquaculture has helped mitigate the risk of poor salmon catches, stabilize fixed net fishers' business management, and contribute to more stable employment in the region.



Landing of cherry salmon (Kamaishi Fish Market)



Miyako trout salmon

(2) Initiatives for Processing, Distribution, and Consumption

- Rising sea temperatures have caused fish species that prefer warmer waters to expand their habitats northward. In response, efforts are underway to enhance the added value of these newly caught species through improved processing and distribution as replacements for species whose catches have declined.
- Additionally, initiatives are being implemented to encourage the consumption of local consumers, who traditionally have not had the habit of eating these fish species.

Case example: Initiatives to expand the consumption of yellowtail (Hokkaido)

- Catches of yellowtail in Hokkaido began to increase around 2011 as a result of rising sea temperatures.
- However, the price of yellowtail in Hokkaido has remained significantly below the national average due to low recognition and consumption, as local residents traditionally do not have the habit of eating yellowtail.
- To expand the consumption of yellowtail, Hokkaido Oshima General Promotion Bureau established the Hakodate Council to Expand and Promote the Consumption of Yellowtail in 2018.
- The “Hokkaido Yellowtail Cutlet with Sauce,” a new dish created in 2020, was positively received. Other yellowtail-based processed foods currently in development include canned yellowtail featuring southern Hokkaido yellowtail in a meat sauce, based on ideas from students at Hakodate Fisheries High School.



Hokkaido Yellowtail Cutlet with Sauce



Canned yellowtail, meat sauce style

Case example: Branding initiatives in regions with increased catches of Japanese Spanish mackerel (Yamagata and Tottori Prefectures)

- In recent years, catches of Japanese Spanish mackerel have been increasing in the Sea of Japan and along the Pacific coast of the Tohoku region.
- However, in areas without a tradition of consuming Japanese Spanish mackerel, low fish prices remain a challenge.
- The Yamagata Prefecture Fishery Cooperative marketed Japanese Spanish mackerel that met its own quality standards, including Ike Jime preparation on board, under the brand name Shonai Obako Sawara, helping to secure stable transactions at high prices.
- The Yodoe Branch of the Tottori Prefecture Fishery Cooperative marketed Japanese Spanish mackerel that met specific standards for lipid content and other criteria under the brand name “Yodoe Gaina Sawara” to support the species’ improved market value.



Shonai Obako Sawara



Yodoe Gaina Sawara

(3) Initiatives Concerning Fishing Ports and Fishing Grounds

- Seaweed beds play a vital role as spawning and nursery grounds for marine organisms and are also expected to function as carbon dioxide sinks. In recent years, poor marine algae growth due to higher water temperatures and increased feeding by herbivores, among other factors, has contributed to the decline of seaweed beds.
- Measures are being implemented nationwide to enhance the overall productivity of marine ecosystems. They include the creation of seaweed beds by local governments and conservation activities (including the removal of herbivores and the installation of mother seaweed) carried out by organizations consisting primarily of fishers and local residents.
- To ensure that efforts to restore seaweed beds and tidal flats along the nation's coastlines are effective and efficient, in December 2023 the national government promoted related initiatives by revising the Future Vision of Seaweed Beds and Tidal Flats (established in January 2016). The Vision outlines the basic concept for implementation and other relevant details.
- The National Conference on Measures Against Seaweed Decline is held annually to promote the horizontal dissemination of effective measures and new technologies for combating seaweed decline nationwide, and to strengthen efforts to conserve seaweed beds in different regions.
- In relation to fishing ports, the creation of seaweed beds is being promoted alongside facility development by incorporating seaweed bed functions into port structures such as breakwaters.



Seaweed bed created by installing natural stones



Marine algae flourishing after seaweed bed creation



Preservation of seaweed beds (removal of sea urchins)



Scene from a meeting of National Conference on Measures Against Seaweed Decline

Case example: Initiatives to restore seaweed beds (Nagasaki Prefecture)

- In Iki City, Nagasaki Prefecture, nearly all seaweed beds have vanished in recent years due to higher water temperatures and feeding by herbivorous species such as the Brassy chub (isuzumi).
- The Iki City Seaweed Bed Restoration Council, which includes the municipal and prefectural authorities and the fishery cooperatives, has launched a program to purchase Brassy chub and other caught species.
- An eradication program is also being conducted by a team of "Isuzumi Hunters," which consists of gill net fishers and divers.
- Some of the purchased fish are processed into fertilizer and animal feed.
- In addition to removing herbivores, restoration efforts are underway using the seaweed *Sargassum fulvellum* to regenerate seaweed beds.



Brassy chubs captured with a gill net



Propagation of *Sargassum fulvellum* seedlings

Section 4 Countermeasures for Future Changes in the Marine Environment

- Further change in the marine environment is anticipated due to the effects of climate change in the years ahead. Considering projected global greenhouse gas emissions for 2030, it is highly likely that temperatures will rise by more than 1.5°C before the end of the 21st century. Without strengthened policies, the average global temperature is projected to increase by 3.2°C by 2100.
- As climate change mitigation measures, in the fisheries sector, the establishment of technologies for electrification and hydrogen battery use for fishing vessels to reduce CO₂ emission, as well as blue carbon to enhance CO₂ sequestration, is promoted.
- As a key component of blue carbon ecosystems, seagrass and seaweed beds are known to absorb CO₂ through photosynthesis and store a portion of that carbon over extended periods. In 2023, a joint research team led by the Japan Fisheries Research and Education Agency developed a method to calculate CO₂ storage capacity in seagrass and seaweed beds. A proper evaluation of the benefits of seagrass and seaweed bed preservation, including its CO₂ storage capacity, is expected to advance conservation efforts by fostering collaboration with environmentally conscious stakeholders. Further progress is anticipated through the use of the carbon credit scheme.
- Through collaboration among relevant government agencies, the CO₂ absorption capacity of seagrass and seaweed beds in the coastal waters of Japan was calculated and reported to the United Nations as approximately 350,000 tons (April 2024).

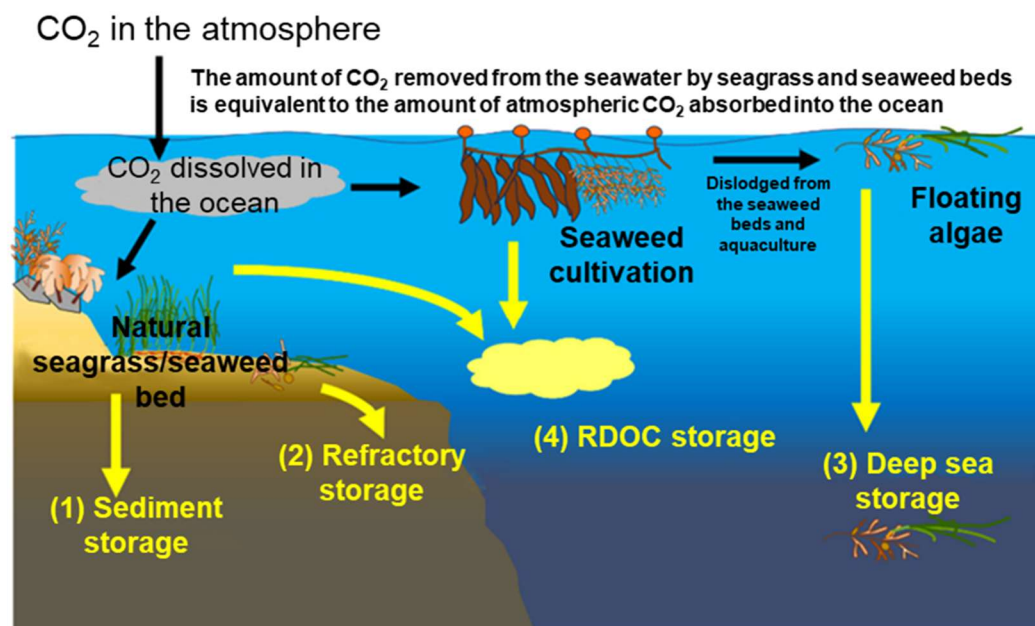


Illustration of a fish feeding vessel powered by a hydrogen battery



Solar power generation equipment installed at the goods handling facility of Hamada Fishing Port, advanced hygiene management type No. 7

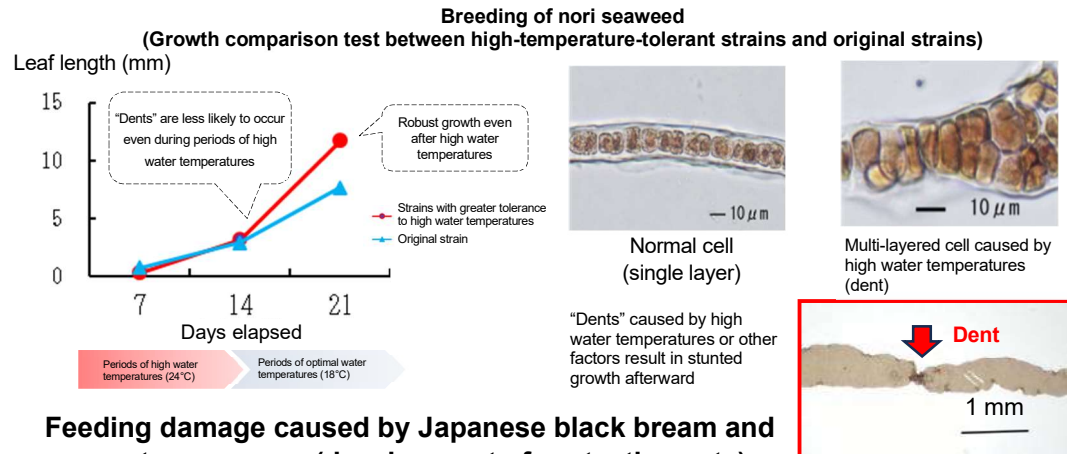
CO₂ storage process in seagrass and seaweed beds



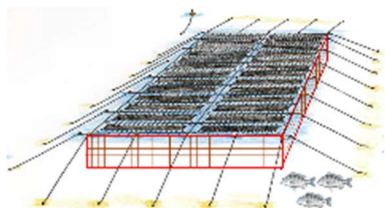
- (1) Sediment storage: The process by which dead seagrass and seaweed accumulate on the seafloor within seagrass/seaweed beds and remain stored for extended periods.
- (2) Refractory storage: The process by which dead seagrass and seaweed, and their fragmented particles are transported and accumulate in coastal areas for extended periods outside seagrass/seaweed beds as refractory particles (particulate matter) that do not transform into CO₂.
- (3) Deep sea storage: The process by which seagrass and seaweed, dislodged by waves or other forces, become drifting algae, are carried offshore, lose buoyancy, and sink to the deep sea, where they remain stored for extended periods.
- (4) RDOC storage: The process by which refractory dissolved organic carbon (RDOC) released from seagrass and seaweed remains stored in seawater for extended periods. RDOC stands for Refractory Dissolved Organic Carbon.

- As part of climate change adaptation efforts, the Climate Change Adaptation Plan of the Ministry of Agriculture, Forestry and Fisheries (last revised in 2023) outlines strategies for the fisheries sector, including marine fisheries, marine aquaculture, inland fisheries/aquaculture, artificial fishing grounds, and fishing ports and villages. The plan details the current status and future projections of climate change impacts and sets out a timeline highlighting the necessary measures for the next decade or so (2021–2030).
- In marine fisheries, based on the New Roadmap for Promoting Resource Management (established in March 2024), measures are focused on enhancing stock assessments and strengthening resource surveys to improve accuracy, taking into account the effects of changes in the marine environment on fishery resources. These efforts prioritize the collection of data on key organisms and promote initiatives to diversify and transition fishing methods and target fish species.
- In marine aquaculture, efforts will focus on developing aquaculture species with greater tolerance to high water temperatures and implementing effective measures to prevent predation. This includes promoting the development of nori seaweed varieties with greater tolerance to high water temperatures and introducing countermeasures against predation of cultured nori by Japanese black bream and other species.
- In fishing ports and fishing grounds, fishing port facilities and coastal protection structures are being systematically developed to respond to sea level rise, increased wave heights, and other environmental changes.
- In 2023, the Fisheries Agency held Study Sessions on Ideal Fisheries Adaptable to Changes in the Marine Environment, compiled future policy directions in June of the same year, and is promoting measures based on the study group's conclusions.

Case example of nori seaweed cultivation (Development of species with greater tolerance to high water temperatures and technology to prevent predation)



Feeding damage caused by Japanese black bream and countermeasures (development of protective nets)



Source: Prepared by the Fisheries Agency based on a report from the Project for the Development of Technology to Transform Aquaculture Industry into a Growth Industry

Summary of Study Sessions on Ideal Fisheries Adaptable to Changes in the Marine Environment (Outline)

1. Enhancement and sophistication of research on resources and stock assessment

- Utilizing new equipment for collecting detailed marine environment and fishery data, conducting surveys using fishing vessels, and implementing other **measures to enhance survey methods**
- Strengthening information gathering on the distribution, migration, and ecology of marine resources, promoting surveys of seaweed beds and tidal flats, and taking other **measures to enhance survey and assessment efforts**

2. Combination and switching of fishing methods and fishing target species

- Promotion of initiatives such as **adding or switching fishing methods or target species** in response to resource fluctuations caused by changes in the marine environment, **transitioning fixed-net operations away from dependence on salmon**, and **shifting to or simultaneously engaging in aquaculture**

3. Shifting to or simultaneously engaging in aquaculture

- **Feed-related measures** such as domestic production of fish meal and development of low-fish meal feed
- **Securing artificial seedlings** through the promotion and widespread adoption of artificial seedling

4. Processing and distribution that can accommodate changes in and expansion of fisheries species

- **Promoting distribution efficiency** through smart technologies and **shifting** to resource-abundant fish species for use as **processing raw materials**

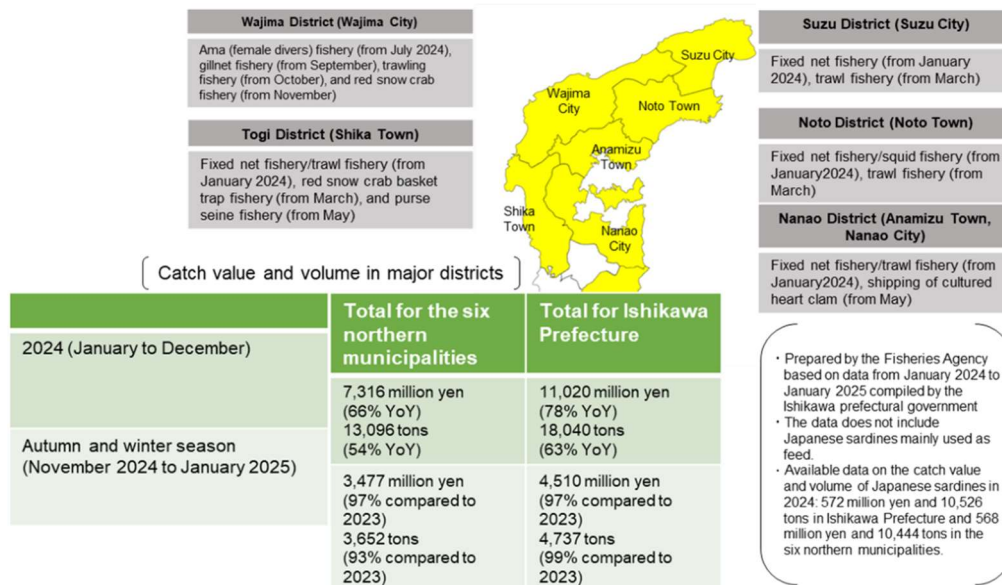
5. Securing and developing management bodies that implement initiatives for the diversification of fish species and fishing methods, as well as human resources and fishery cooperative associations that support such initiatives

- **Establishing systems and mechanisms to support** fishers engaged in diversification and other efforts

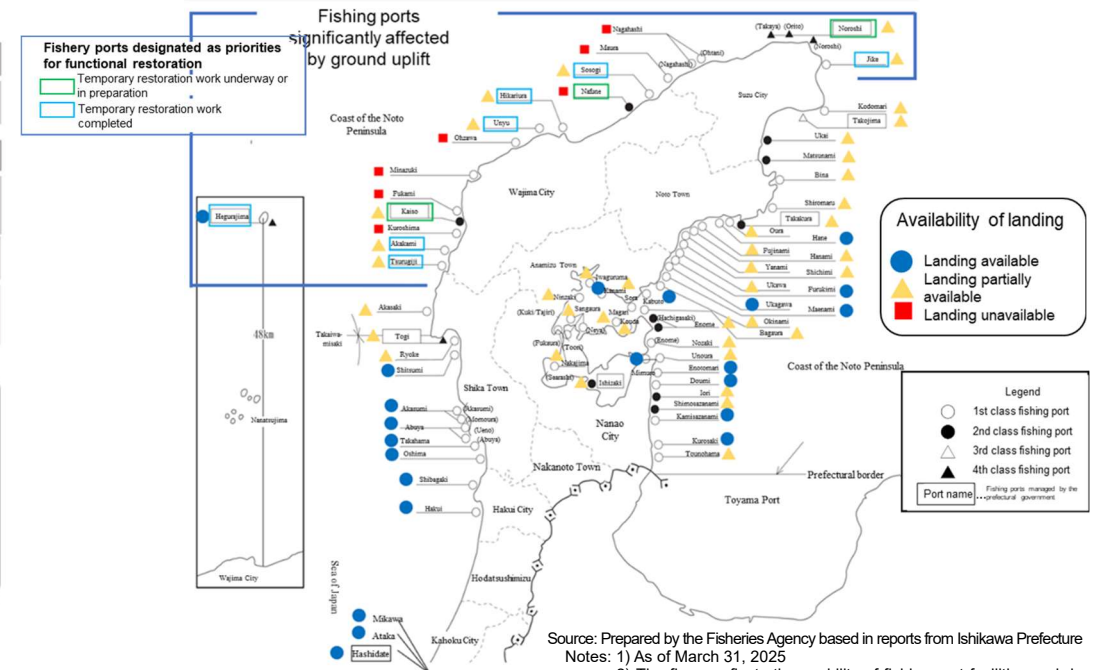
Topic 1 Trends in Restoration after the 2024 Noto Peninsular Earthquake

- Following the earthquake damage, fishers with operational vessels and gear have gradually resumed activities in line with the restoration of facilities. Since January 2024, fisheries operations have gradually resumed, depending on the extent of damage and progress in restoring fishing ports and facilities, for fixed net fishery, trawl fishery, squid fishery, purse seine fishery, shrimp basket trap fishery, red snow crab basket trap fishery, and oyster farming.
- In the Wajima district, fishery by Ama (female diver) resumed in July 2024, gillnet fishery in September, and trawling fishery in October. Trawl fishery for snow crabs started following the start of fishing season in November. In the six northern municipalities, operations are steadily recovering following infrastructure improvements, including the temporary restoration of shared facilities essential for continued activity. For the entire 2024, the total catch value was 66% of the previous year's total, while the total catch volume was 54% of the previous year's figure. From the start of the autumn-winter season (November 2024 to January 2025), the total catch value reached 97% of the previous year's level, while the catch volume was 93%. The Fisheries Agency will continue to support the restoration of fishery operations in the affected areas.
- Regarding the restoration of fishing ports, emergency repairs were conducted in areas without ground uplift, allowing catch landings at all fishing ports. In addition, in response to requests from Ishikawa Prefecture and other entities, the Fisheries Agency carried out disaster recovery work on their behalf at Noroshi Fishing Port and along the coast of Ukai Fishing Port.

Status of Resumption of Fisheries



Status of Restoration/Reconstruction of Fishing Ports in the Noto Peninsula



Source: Prepared by the Fisheries Agency based on reports from Ishikawa Prefecture

Note: As of March 31, 2025

Topic 2 Revision of the Fishery Act, etc., to Ensure the Reliable Implementation of Reporting Obligations Regarding Catch Volume, etc., for Pacific Bluefin Tuna



- Since January 2015, Japan has implemented fisheries management in accordance with conservation and management measures for Pacific bluefin tuna established by the Western and Central Pacific Fisheries Commission (WCPFC), in response to the decline of its stock in the western and central Pacific Ocean.
- However, there have been instances where some fishers and local wholesalers distributed Pacific bluefin tuna without reporting their catches. In response, the Act Partially Amending the Fishery Act and the Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants was enacted in June 2024, to strengthen the management of Pacific bluefin tuna resources.
- The Fishery Act has been amended to include the following measures for specially managed specified fishery resources such as large Pacific bluefin tuna: requiring the number of individual fish caught to be reported in addition to total catch weight; mandating the retention of records used in TAC (Total Allowable Catch) reports, such as names of fishing vessels and weight of each fish; and increasing statutory penalties for violations related to TAC reporting and other related offenses.
- The Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants has been amended to require the transmission of information such as names of fishing vessels and weight of each fish for specially managed specified fishery resources, etc. and to establish penalties for operators who violate obligations related to information transmission and transaction record-keeping.

Illustration of the revised Fishery Act

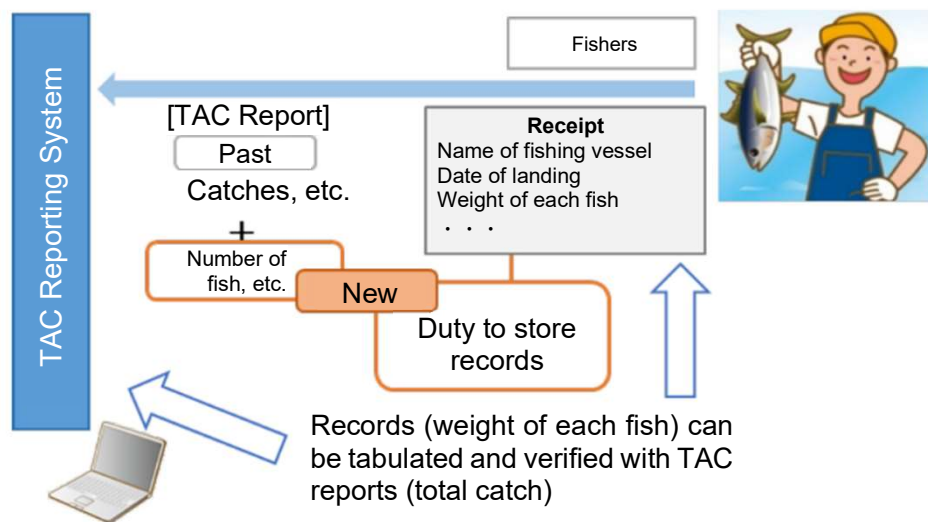
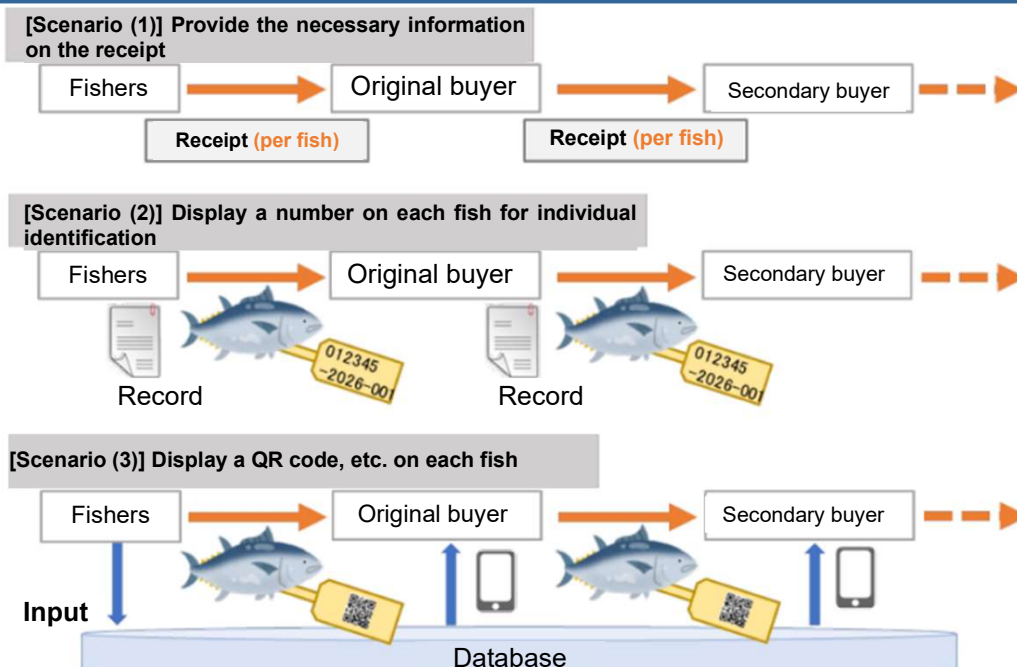


Illustration of the revised Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants



Topic 3 Continuation of Damage by Red Tide

- A red tide appeared in the Yatsushiro Sea, Tachibana Bay, and other locations from May to August 2024. The red tide resulted in the mass death of cultured fish, including greater amberjack, Japanese horse mackerel, yellowtail, and Japanese pufferfish, in Nagasaki, Kumamoto, and Kagoshima Prefectures, resulting in losses to the fishing industry totaling approximately 3.13 billion yen (as of the end of March 2025). A massive red tide also occurred in 2022 and 2023.
- The Fisheries Agency is undertaking multiple initiatives to mitigate fisheries damage caused by red tides: developing and verifying red tide monitoring technologies, researching red tide formation mechanisms to improve early detection, creating damage mitigation methods such as deploying additional nets and submerging fish cages and formulating guidelines for these practices, developing pesticides to control harmful red tide plankton, along with application methods, and developing rescue techniques for yellowtail using high-concentration oxygen.
- Countermeasures for the red tide damage that occurred in FY2024 include supporting the development of a monitoring system to minimize future impact, demonstrating methods to control red tide outbreaks, and introducing measures to mitigate damage.

Recent Fisheries Damage in the Yatsushiro Sea

Prefecture	FY2022	FY2023	FY2024
Kumamoto Prefecture	1.97 billion yen	1.54 billion yen	1.48 billion yen
Nagasaki Prefecture	—	1.10 billion yen	1.55 billion yen
Kagoshima Prefecture (Yatsushiro Sea)	0.009 billion yen	0.05 billion yen	0.10 billion yen
Total	1.98 billion yen	2.69 billion yen	3.13 billion yen

Source: Survey by prefectural governments (as of the end of March 2025)



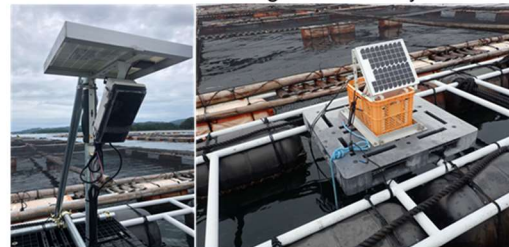
Red tide damage

(Photo courtesy of Nagasaki Prefecture)

Key Countermeasures to Mitigate Red Tide Impacts

Sophistication of monitoring/prediction

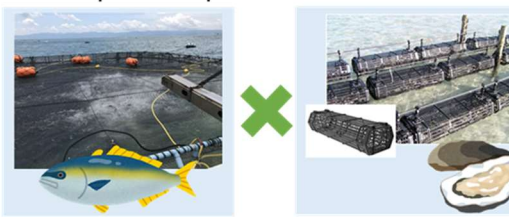
Data collection using telemeter system



Courtesy: Kumamoto Prefecture

Measures to control red tide

Composite aquaculture with bivalves



Source: Maruha Nichiro AQUA, Hexcyl Systems Pty Ltd

Damage reduction

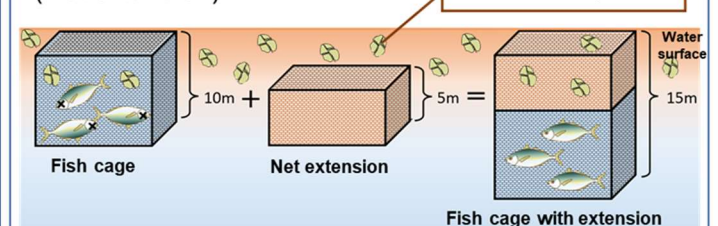
(Expanding the size of fish cage) **20 m wire mesh fish cage**

8 m wire mesh fish cage



Source: Maruha Nichiro AQUA

(Net extension)

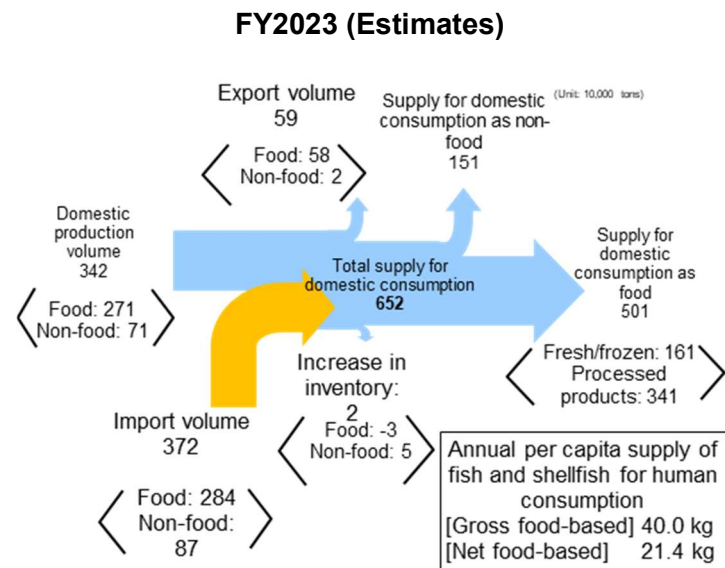


Chapter 1 Trends in the Supply-and-Demand and Consumption of Fish and Fishery Products in Japan

(1) Supply-and-Demand Situation in Fish and Fishery Products

- The total supply of domestic consumption of fish and shellfish was estimated at 6.52 million tons for FY2023 (converted on a fresh-fish basis, estimate), of which 5.01 million tons (77%) were for human consumption (food) and 1.51 million tons (23%) as non-food (feed and fertilizer).
- The self-sufficiency rate of fish and shellfish in FY2023 was 54% (estimate).

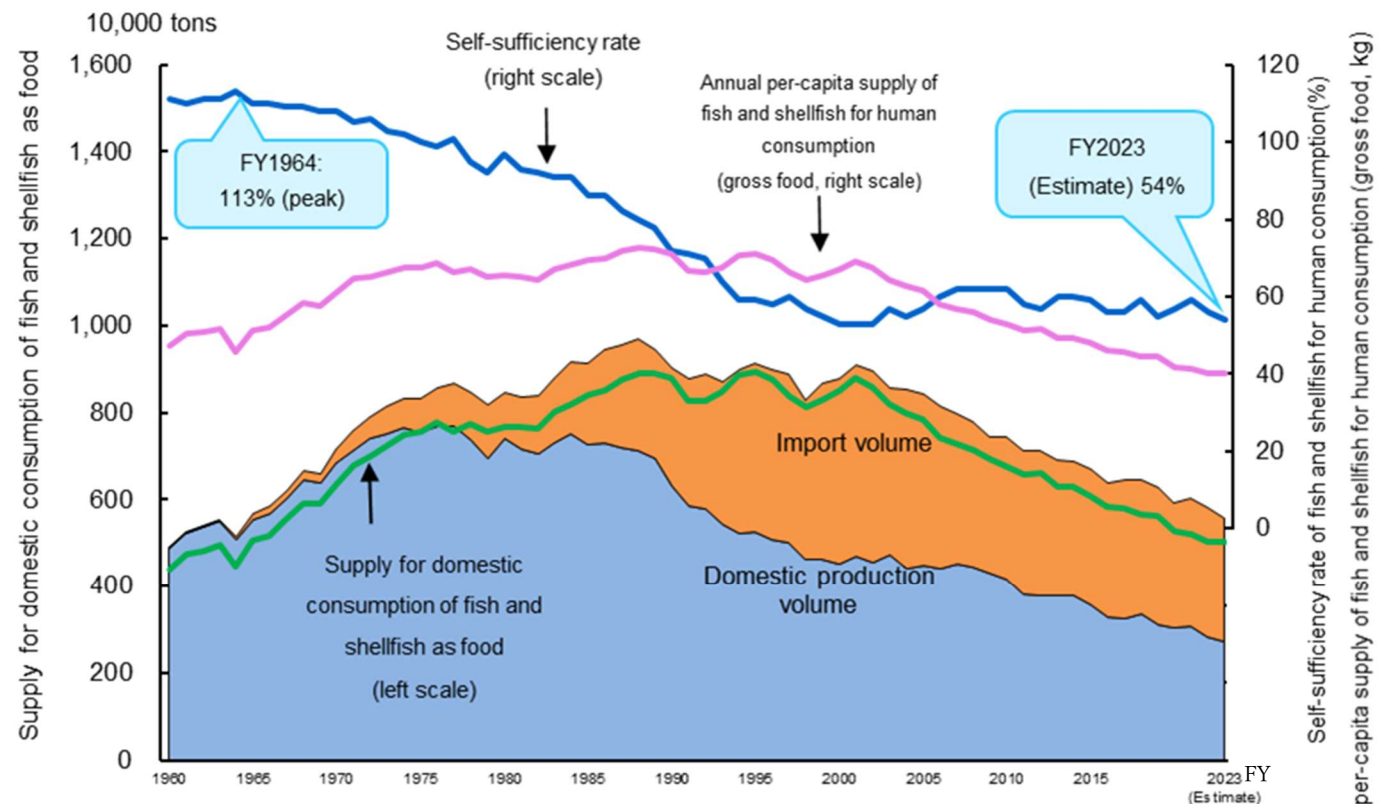
Japan's Production and Consumption Structure of Fish and Fishery Products



Source: Food Balance Sheet (Ministry of Agriculture, Forestry and Fisheries)

- Notes: 1) The figures are after conversion on a round-fish basis (except for net food-based supplies) and do not include marine algae or the whaling industry's catch.
- 2) Conversion on a round-fish basis means the conversion of a volume involving different product forms according to items, such as import volume and export volume, into an equivalent volume based on round-fish by using the coefficient prescribed for each product form.
- 3) The term "gross food" refers to the amount of fish and shellfish for human consumption, including disposal volume. The term "net food" refers to the amount of only the edible parts obtained after excluding, from gross food, the parts subject to disposal in ordinary eating habits (such as fish heads, internal organs, and bones).
- 4) For estimates in FY2023, the figures for Ishikawa Prefecture were estimated based on past production volumes, as the impact of the 2024 Noto Peninsula Earthquake made it difficult to compile accurate data at the time of the statistical release on domestic production volume.

Trends in Self-Sufficiency Rate of Fish and Shellfish



Source: Food Balance Sheet (Ministry of Agriculture, Forestry and Fisheries)

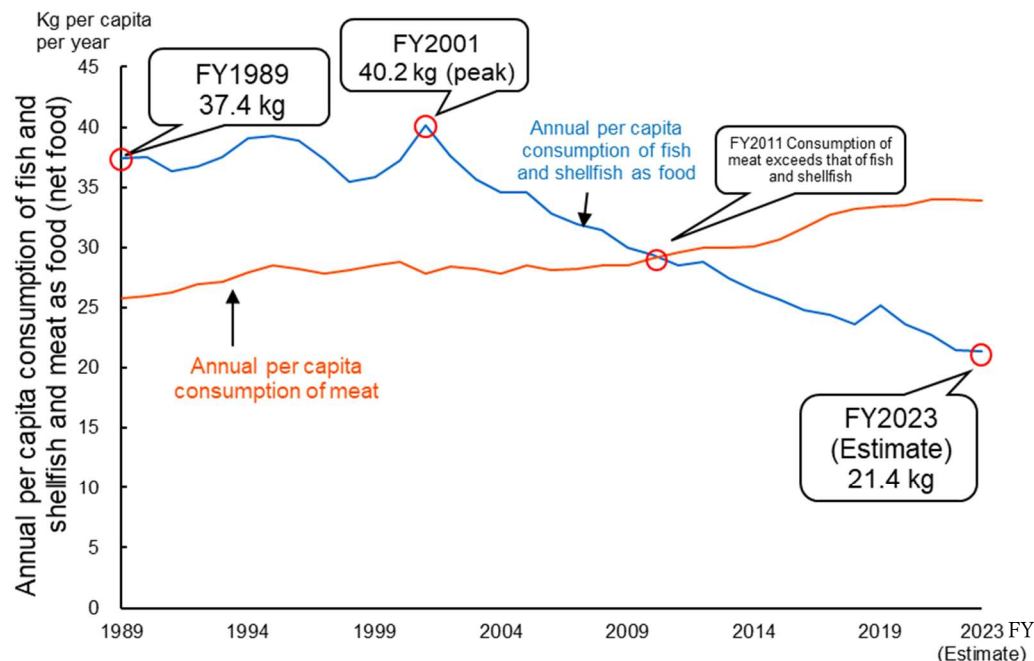
Note: Self-sufficiency rate (%) = (Domestic production volume / Total supply for domestic consumption) × 100. Total supply for domestic consumption = Domestic production volume + Import volume - Export volume ± Increase/decrease in inventory

(2) Status of the Consumption of Fish and Fishery Products and Initiatives to Expand Consumption



- Annual per-capita consumption of fish and shellfish (net food base) has been on a decreasing trend after peaking at 40.2 kg in FY2001, hovering below annual per-capita meat consumption since FY2011. The figure in FY2023 was 21.4 kg (estimate).
- Factors discouraging consumers from purchasing fish and shellfish include high prices and the time and effort needed for preparation. Consumer preferences are shifting, with a growing trend toward simplicity and convenience in food consumption.
- The Fisheries Agency has designated the 3rd to the 7th of each month as “Sakana no Hi” (Fish Day) to promote public and private initiatives aimed at increasing fish and shellfish consumption. Various initiatives undertaken by more than 1,000 supporters of “Fish Day” include selling so-called low and underutilized fish through mass retailers and hosting domestic natural fish fairs at restaurants and other locations.
- The Fisheries Agency supports initiatives that promote the development and presentation of highly convenient products through collaboration among stakeholders in production, processing, distribution, and sales, while also encouraging the “creation of popular products” based on a market-driven approach that includes improving distribution efficiency.

Changes in Annual per Capita Consumption of Fish and Shellfish as Food (Net Food Base)



Source: Food Balance Sheet (Ministry of Agriculture, Forestry and Fisheries)



‘Fish Day’ logo “lina-kun” named by Sakana-kun



Sakana-kun, the “Fish Day” Ambassador



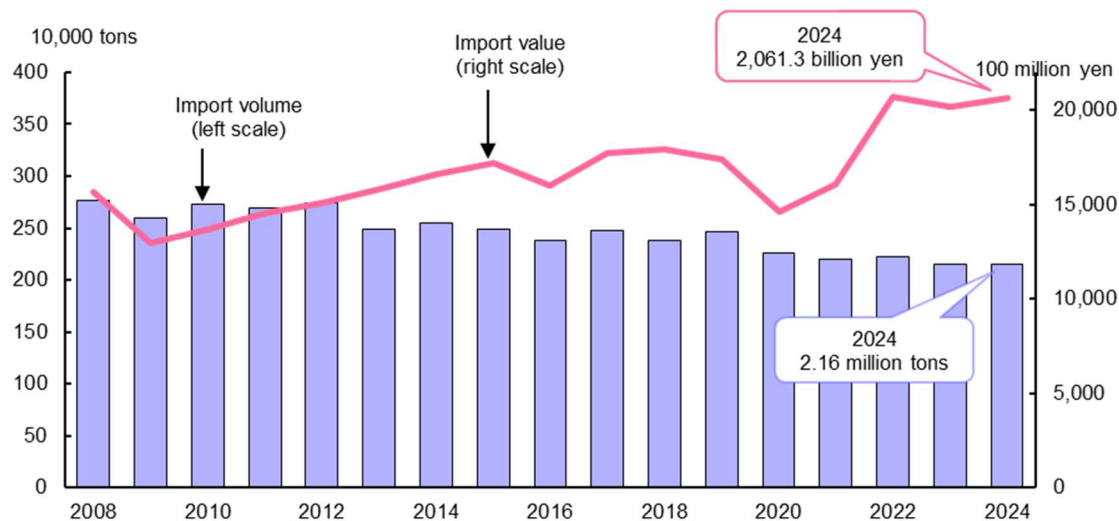
Sazae-san family as supporters of the “Fish Day”

(3) Trends in the Trade of Fish and Fishery Products

i. Trends in Importation of Fish and Fishery Products

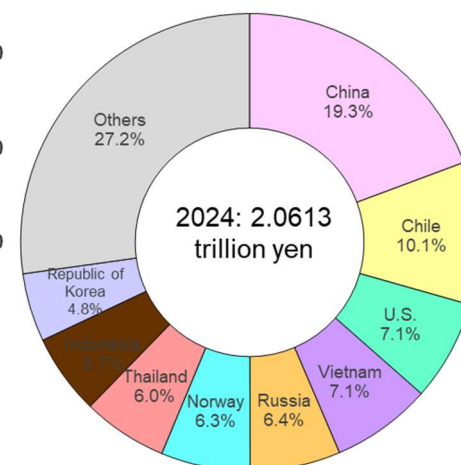
- The import volume of fish and fishery products (on a product weight basis) in 2024 remained the same as in the previous year at 2.16 million tons. The import value increased by 2.2% from the previous year to 2.0613 trillion yen.
- Major import source countries/regions are China, Chile, and the United States. Major import items in terms of import value are salmon and trout, shrimp, and skipjack and tuna.

Trends in the Import Volume and Import Value of Fish and Fishery Products, Import Source Countries/Regions, and Breakdowns of Items

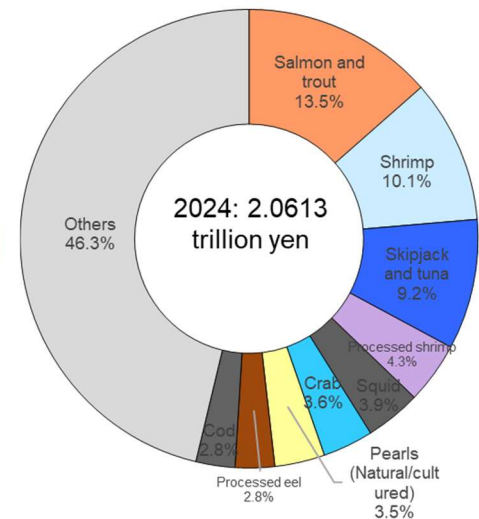


Source: Prepared by the Fisheries Agency, based on the Foreign Trade Statistics (Ministry of Finance)

<Import source countries and regions>



<Import items>



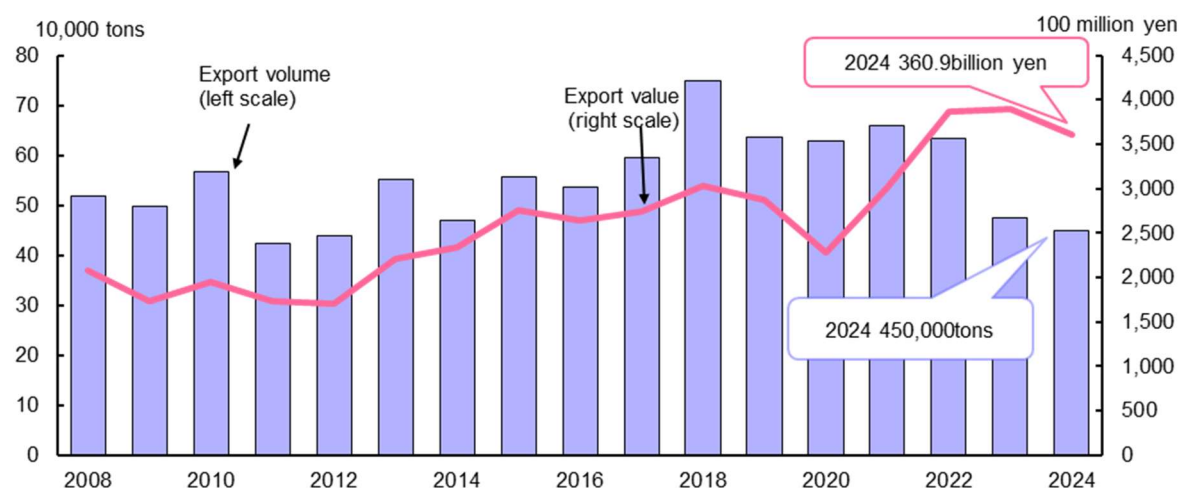
Share in the total import value of agricultural, forestry, and fishery products and food: 15%

Source: Prepared by the Fisheries Agency based on the Foreign Trade Statistics (Ministry of Finance, 2024)

ii. Trends in Export of Fish and Fishery Products

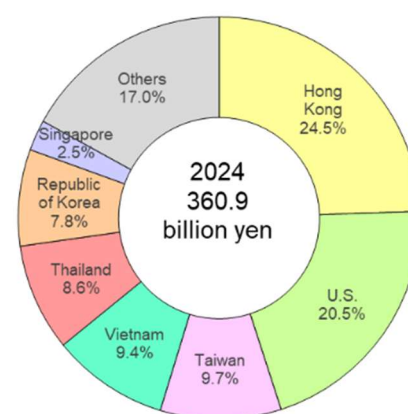
- The export volume of fish and fishery products (on a product weight basis) decreased by 5.5% from the previous year to 0.45 million tons in 2024. The export value decreased by 7.5% from the previous year to 360.9 billion yen.
- Major export destinations are Hong Kong, the United States, and Taiwan. Although the value of export to China accounted for 22% of the total export value in 2022, this percentage decreased to 2% in 2024 due to China's suspension of import of fish and fishery products from all of the prefectures of Japan after the commencement of discharge of ALPS treated water into the sea in 2023.
- In terms of export value, major export items are scallops, yellowtail, and pearls.
- Based on “The Export Expansion Action Strategy for Agricultural, Forestry, Fishery and Food Products” (decided in 2020), yellowtail, sea bream, scallops, pearls, and Nishikigoi were designated as priority export items of fishery products as of the end of FY2024. The Global Farmers/Fishermen/Foresters/Food Manufacturers Project (GFP) is being promoted to expand exports of agricultural, forestry, fishery products and food by fostering and supporting producers and businesses committed to export activities.

Trends in the Export Volume and Export Value of Fish and Fishery Products, Breakdowns of Export Destination Countries/Regions, and Items

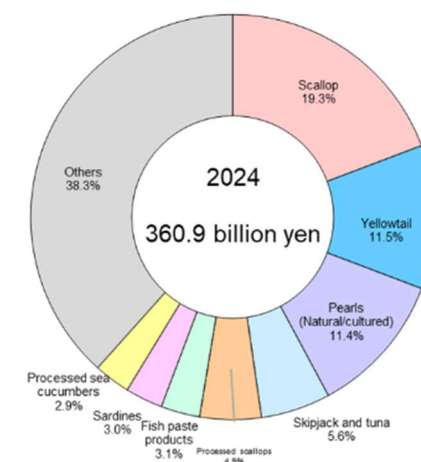


Source: Prepared by the Fisheries Agency, based on the Foreign Trade Statistics (Ministry of Finance)

<Export destination countries / regions>



<Export items>



Share in the total export value of agricultural, forestry, and fishery products and food: 26%

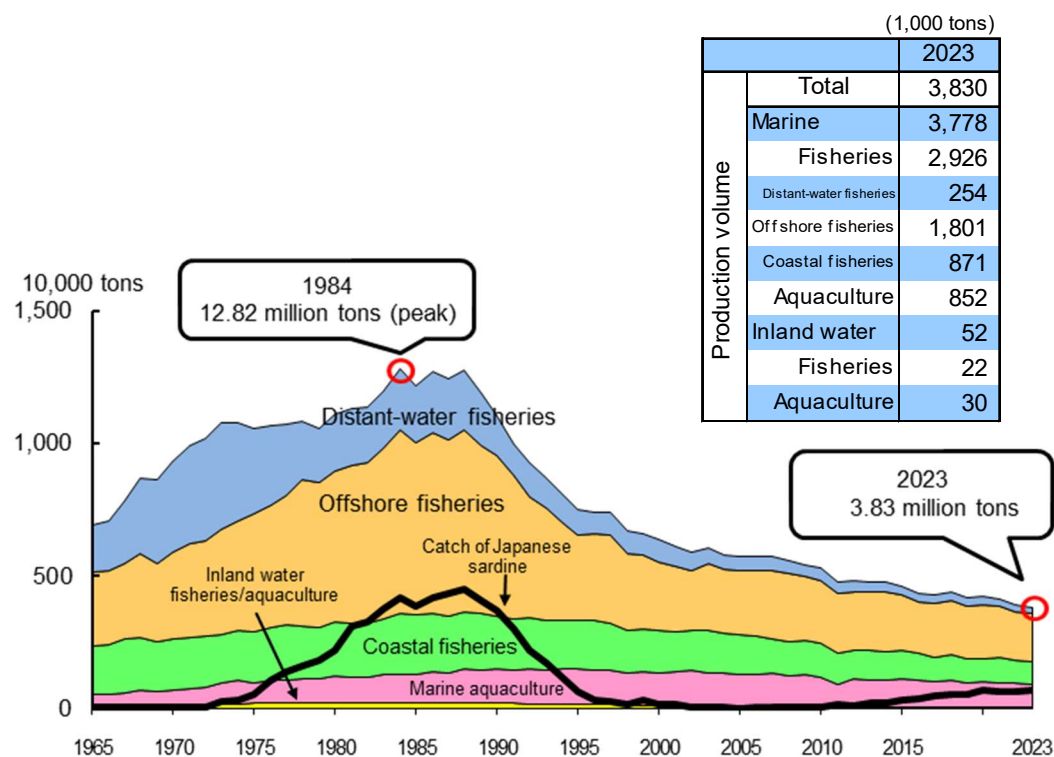
Source: Prepared by the Fisheries Agency based on the Foreign Trade Statistics (Ministry of Finance, 2024)

Chapter 2 Trends in Japan's Fisheries

(1) Trends in Domestic Fisheries and Aquaculture Production

- The volume of domestic fisheries and aquaculture production decreased by 90,000 tons from the previous year to 3.83 million tons in 2023, of which that of marine fisheries decreased by 20,000 tons from the previous year to 2.93 million tons. In particular, the volume of scallops, mackerel, etc. decreased. The volume of marine aquaculture decreased by 60,000 tons to 0.85 million tons. The volume of inland water fisheries and aquaculture decreased by 2,000 tons to 50,000 tons.
- The production value of domestic fisheries and aquaculture increased by 85.2 billion yen from the previous year to 1.6853 trillion yen in 2023 (the highest level since 2003), of which that of marine fisheries increased by 37.3 billion yen to 953.4 billion yen, that of marine aquaculture increased by 52.3 billion yen to 595.6 billion yen, and that of inland water fisheries and aquaculture decreased by 4.5 billion yen to 136.3 billion yen.

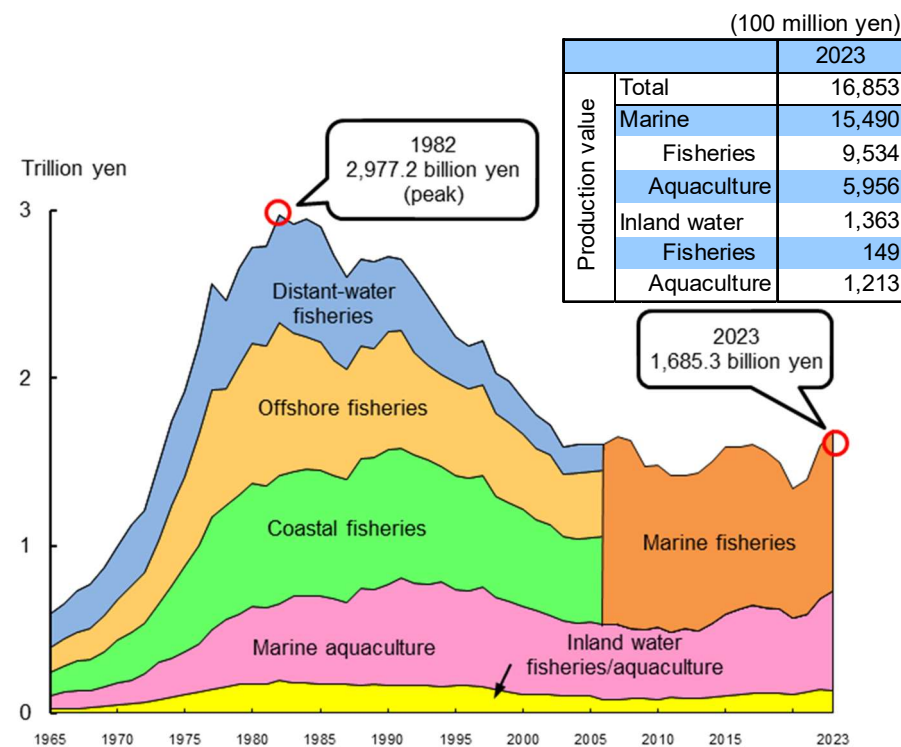
Trends in the Production Volume of Fisheries and Aquaculture



Source: Statistics on Fishery and Aquaculture Production (Ministry of Agriculture, Forestry and Fisheries)

Note: For "distant-water fishery," "offshore fishery," and "coastal fishery," which are breakdown items of fisheries and aquaculture production volume, surveys of catch by vessel tonnage group were discontinued in 2007. As a result, figures from 2007 to 2010 are estimates. From 2011 onward, catch data for each fishery type within "distant-water fishery," "offshore fishery," and "coastal fishery" have been individually tabulated.

Trends in the Production Value of Fisheries and Aquaculture



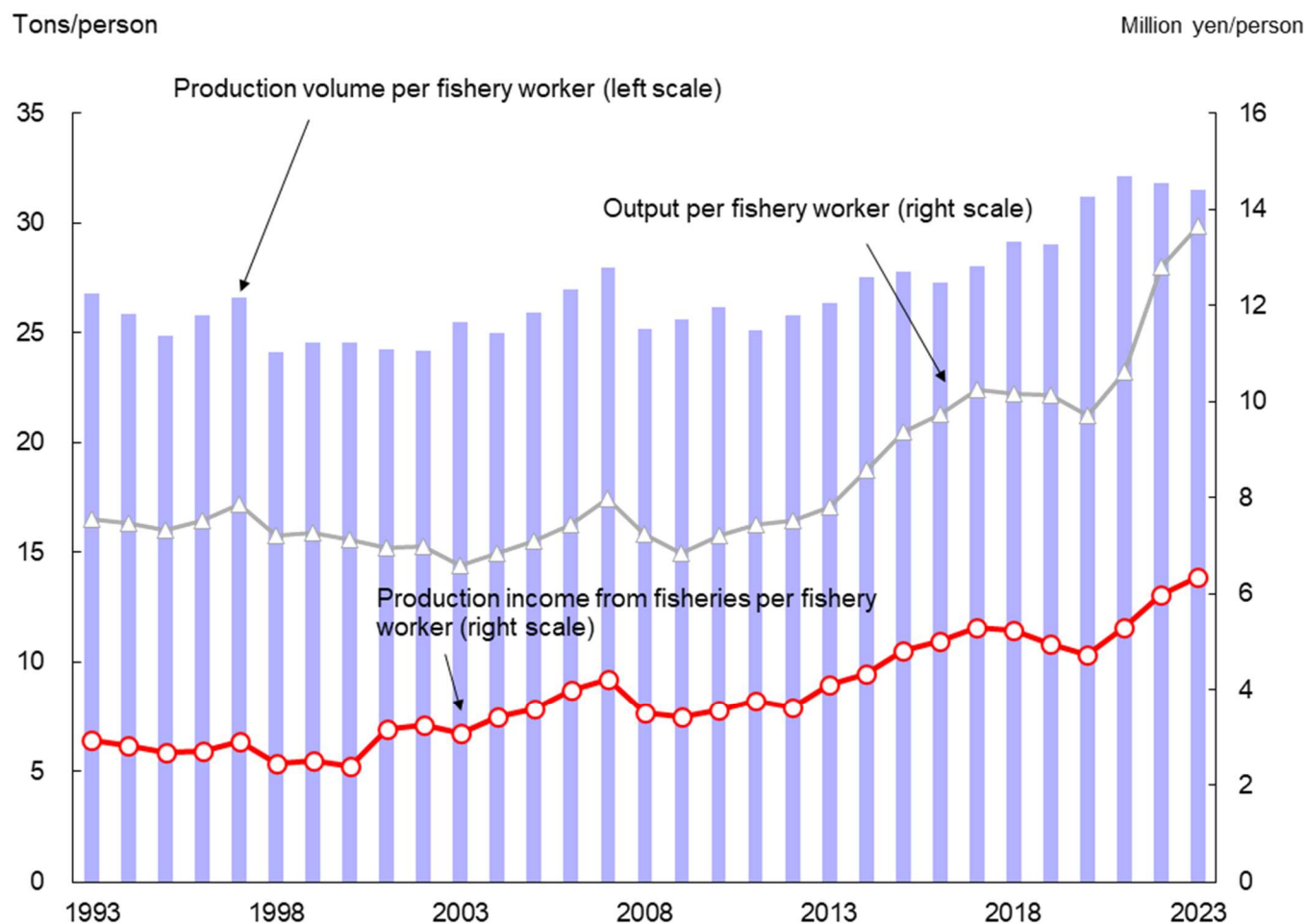
Source: Prepared by the Fisheries Agency, based on the Fisheries Output (Ministry of Agriculture, Forestry and Fisheries)

Notes: 1) The fishery production value was obtained by adding the juveniles production value to the fisheries output (a value estimated by multiplying the production volume of fisheries and aquaculture by the wholesale prices in the landing area, etc.).

2) Compilation of output by sector of marine fisheries was discontinued in 2007.

- Despite a decrease in the number of fishery workers, both output per worker and production income from fisheries in Japan have increased overall.
- Output and related figures per fishery worker had been declining since 2017, but began to rise again in 2021.
- In 2023, output per fishery worker reached 13.66 million yen, while production income from fisheries was 6.34 million yen.

Productivity per Fishery Worker



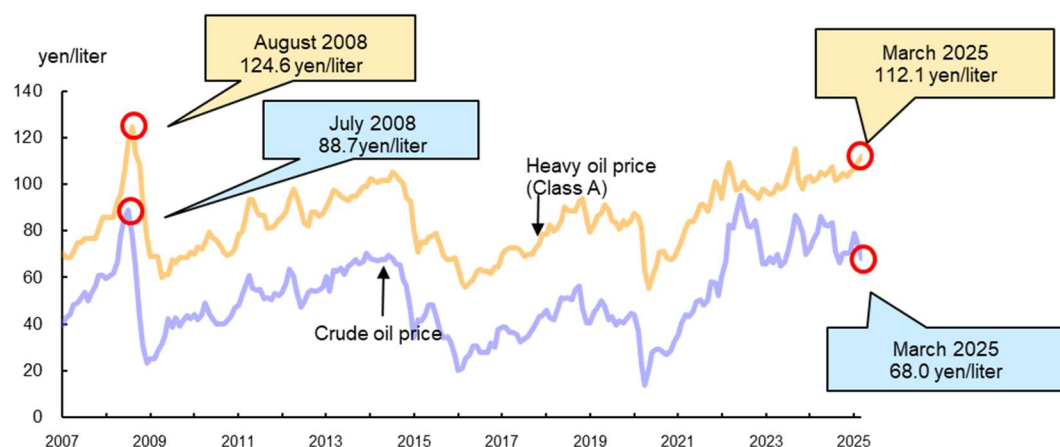
Sources: Prepared by the Fisheries Agency based on the Census of Fisheries (number of fishery workers in 1993, 1998, 2003, 2008, 2013, 2018 and 2023), Survey on Movement of Fishery Structure (number of fishery workers after 2019), Survey of Persons Engaged in Fishery (number of fishery workers for other years), Statistics on Fishery and Aquaculture Production (production volume), and Fisheries Output (output and fisheries income) (Ministry of Agriculture, Forestry and Fisheries)

- Notes:
- 1) The production volume per fishery worker is calculated by dividing the total production volume by the number of fishery workers.
 - 2) The output per fishery worker is calculated by dividing the total fisheries output (excluding juvenile fish production) by the number of fishery workers.
 - 3) The production income from fisheries per fishery worker is calculated by dividing production income from fisheries (excluding juvenile fish production) by the number of fishery workers.
 - 4) The production income from fisheries is determined by subtracting physical expenses (including depreciation and indirect taxes) from the fisheries output.
 - 5) The figures for Iwate, Miyagi, and Fukushima Prefectures are excluded from the 2011 and 2012 statistics (the estimates on inland water fisheries/aquaculture are based on the national average price per fish species).

(2) Trends in Management of Fisheries and Aquaculture

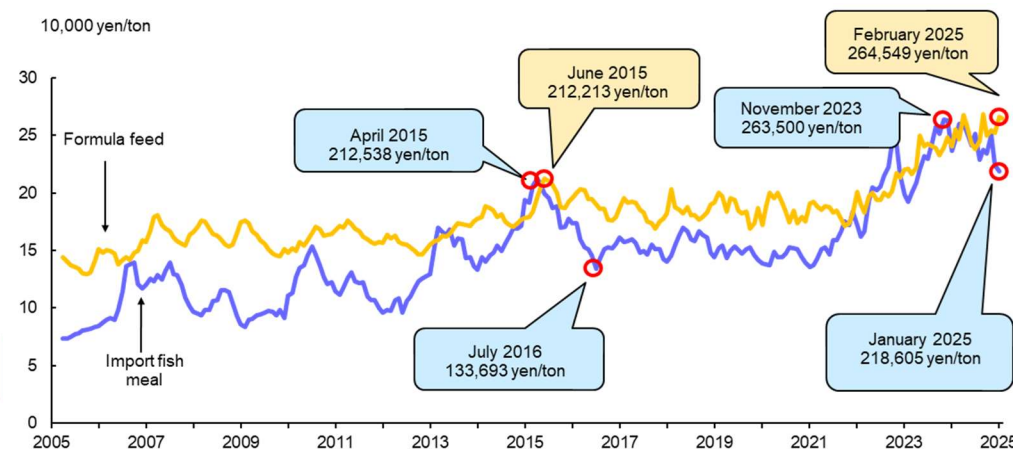
- The average fishing income of private management bodies engaged in coastal fisheries using vessels decreased by 330,000 yen from the previous year to 2.19 million yen in 2023. Among all private management bodies engaged in fisheries using vessels, those whose core fishery workers were under 65 years of age had a fishing income of 7.03 million yen for the same year.
- The average fishing income of private management bodies engaged in marine aquaculture increased by 4.71 million yen from the previous year to 15.33 million yen in 2023.
- Fuel oil prices remain highly volatile and elevated due to the global economic recovery from the slowdown caused by the COVID-19 pandemic and the ongoing conflict between Russia and Ukraine.
- The import price of fish meal, a main ingredient in formula feed for fish farming, has been rising due to factors such as increasing global demand and recovery from the global economic slowdown caused by the COVID-19 pandemic.
- Measures have been taken against sharply increasing fuel oil and formula feed prices, through the Fishery Management Safety Net Construction Project.

Trends in Fuel Oil Prices



Source: Survey by the Fisheries Agency

Trends in the Prices of Formula Feed and Fish Meal

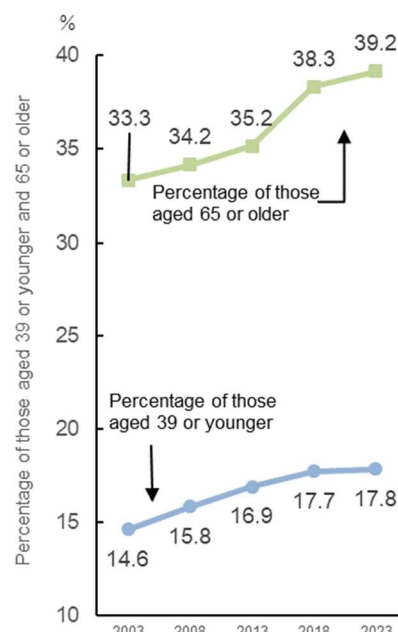
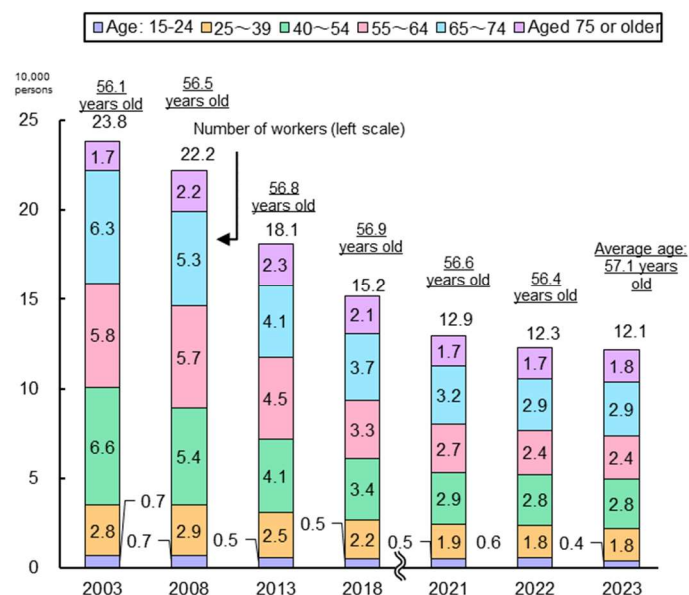


Source: Foreign Trade Statistics (fish meal; Ministry of Finance), Japan Fish Feed Association survey (formula feed until June 2013), and Fisheries Agency survey (formula feed from July 2013 onward).

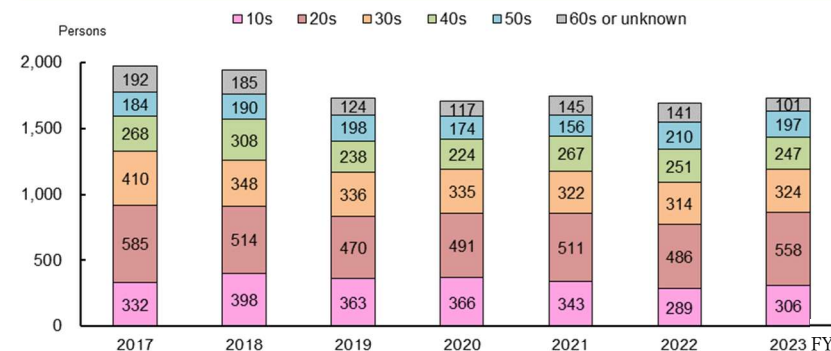
(3) Trends in Fishery Workers and Fishery Working Environments

- The number of fishery workers has been consistently declining, totaling 121,389 in 2023.
- The number of new fishery workers was 1,733 in FY2023. The government, etc., provides support for initiatives that seek to secure new fishery workers, such as fisheries employment counseling sessions, internship, and long-term training on fishery operation sites.
- In 2024, the number of fishing vessels involved in marine accidents was 464, and the number of dead and missing reported in those accidents was 22. The rate of occupational accidents in the fishing industry is approximately four times higher than the average for all land-based industries.
- Life jackets, which are mandatory to wear in principle, are crucial for survival in overboard incidents (the survival rate is approximately 1.7 times higher with a life jacket than without one).

Trends in the Number of Fishery Workers



Trends in the Number of New Fishery Workers



Source: Estimated by the Fisheries Agency based on surveys conducted by prefectures on new fishery workers

Trends in the Number of Fishing Vessels Involved in Marine Accidents and the Number of Dead and Missing Associated with Marine Accidents



Source: Survey by the Japan Coast Guard

Source: Census of Fisheries (Ministry of Agriculture, Forestry and Fisheries, 2003, 2008, 2013, 2018 and 2023) and Survey on Movement of Fishery Structure (2021 and 2022)

Notes: 1) A "fishery worker" refers to a person aged 15 or older who has been engaged in offshore fishery operations for at least 30 days in the past year.

2) For 2008 and beyond, the surveys were conducted on the fishery management body (employer) side and included those residing in non-coastal municipalities who had not been previously included. Therefore, those surveys are not in line with the 2003 survey.

3) The figures for "Average age" are estimates based on the median age of each age group (the value 80 is assigned to the "Aged 75 or older" category) as calculated using data from the Survey on Movement of Fishery Structure and the Census of Fisheries.

(4) Development and Utilization of Technologies for Promoting Smart Fisheries

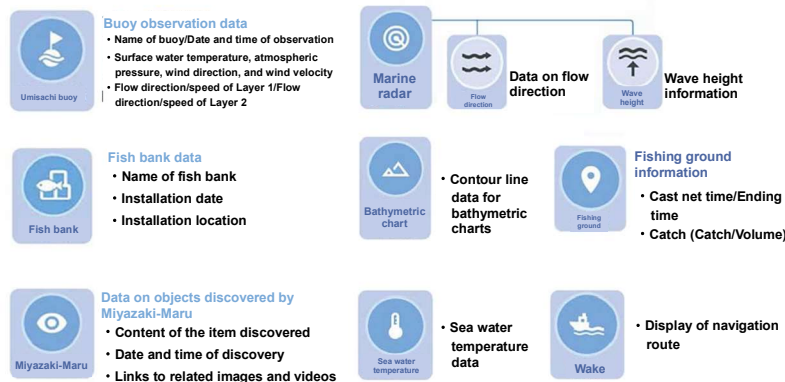
- With the goal of transforming the fisheries industry into a growth sector, which faces increasing challenges such as declining production volumes in fisheries and aquaculture and a decreasing number of fishery workers, effective measures using technologies such as ICT, IoT, AI, and drones are being developed, introduced, and advanced across the stock assessments, fisheries/aquaculture, and processing/distribution sectors to enable highly accurate stock assessments and enhance profitability by reducing labor and personnel costs.
- Initiatives to expand the pool of human resources skilled in smart fisheries technologies are being promoted, including the establishment of a human resource bank dedicated to smart fisheries.
- By the end of FY2024, five districts were selected as model areas for the creation of “digital fisheries strategy bases,” aimed at comprehensively integrating regional digitalization efforts across all stages, from resource management to production, processing, distribution, and consumption.

Case example: Development of smartphone app that supports fishing operations (Miyazaki Prefecture)

- A smartphone app named the “Miyazaki Prefecture Fisheries Technology Support System” has been developed and launched in Miyazaki Prefecture. The app enables fishers to access data obtained by floating artificial reefs, such as surface water temperature and wind speed, as well as current direction and wave height information from marine radars.
- This information supports fishers in making decisions such as whether to proceed with fishing operations, explore fishing grounds, and carry out other related activities.
- In addition, since users can record their vessel's route, net casting and hauling, catch results, and other information on the app, it is used to visually represent experience and intuition, enhance operational efficiency, and facilitate the transfer of skills to the next generation.



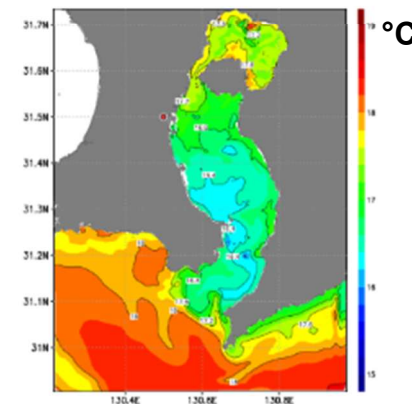
Screen image



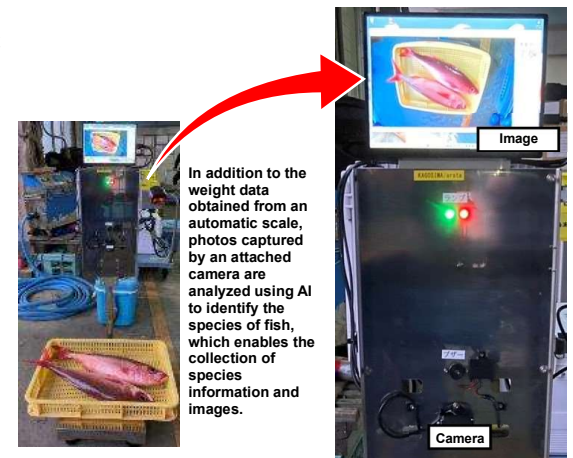
Examples of displayed information

Case example: Model district for digital fisheries strategy base (Kagoshima Prefecture)

- Under the banner of “promoting smart fisheries,” Kagoshima Prefecture is advancing digitalization in four key areas: smart fishing vessels and fisheries operations, digitalization of market operations, traceability of juvenile eels, and the red tide damage prevention network.
- Led by the Kagoshima Prefecture Fisheries Catch Information Digitization Promotion Council as the secretariat, the initiative aims to build a system that addresses shared challenges and supports the transfer of fisheries-related technologies.
- These collaborations are expected to promote mutual information sharing, enhance existing initiatives, and drive the development of new digitalization efforts.



Smart fishing vessels and fisheries - Sea Condition Forecast for Kagoshima Bay (Seawater Temperature)



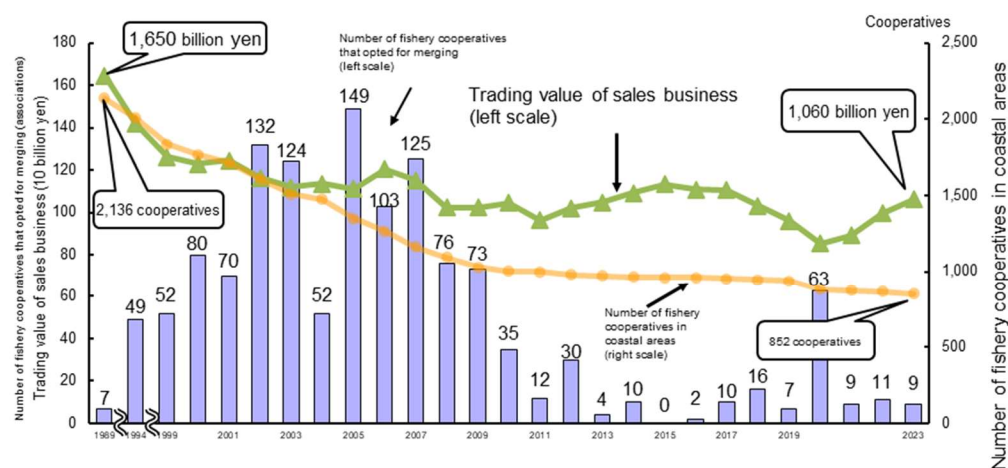
Digitalization of market operations - Automatic weighing scale

(5) Trends in Fishery Cooperatives, Trends in the Distribution and Processing of Fish and Fishery Products



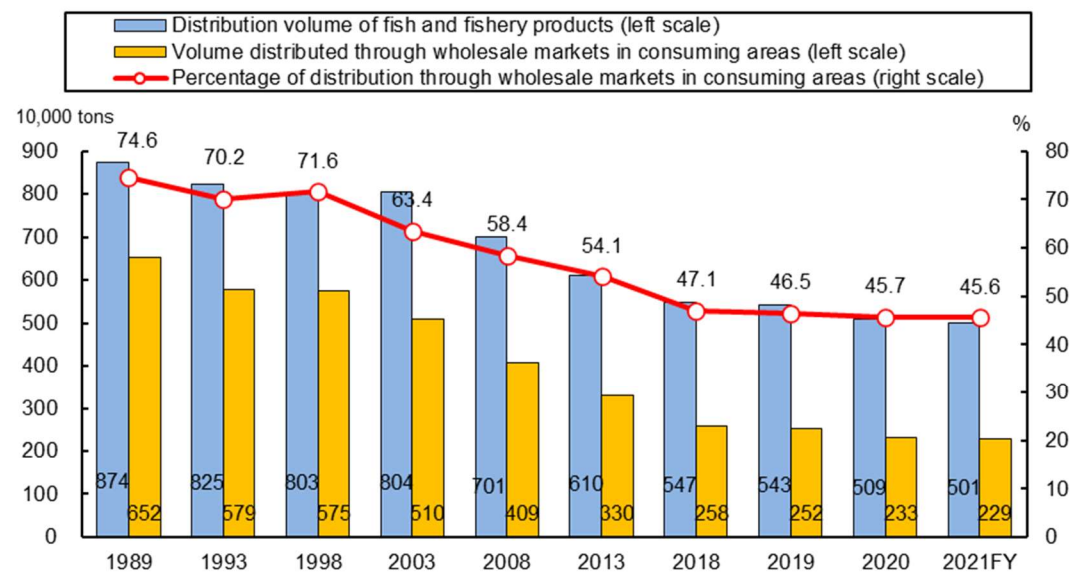
- A fishery cooperative contributes to the stabilization and development of fishery business management by implementing sales business and related operations. It is an organization that plays a core role in supporting the regional economy and social activities of a fishing community, primarily through the appropriate use and management of fishery resources.
- The number of fishery cooperatives (in coastal areas) was 852, as of the end of FY2023. There is a need to strengthen fishery cooperatives' business and management foundation through mergers and to further reinforce their sales business.
- Wholesale markets play a critical role in effectively distributing fish and fishery products. However, the percentage of these products distributed through wholesale markets in consuming areas is decreasing, while non-market distribution is steadily increasing. In particular, the market functions of markets in landing areas need to be maintained and strengthened through market consolidation and other measures.
- Fishery processors face challenges such as limited management capacity, labor shortages, and difficulties in sourcing raw materials. To address these issues, support has been provided for initiatives that establish value chains aligned with market needs by coordinating production, processing, distribution, and sales.

Trends in the Number of Fishery Cooperatives in Coastal Areas, the Number of Fishery Cooperative That Opted for Merging, and the Trading Value of Their Sales Business



Source: Annual Report of Fishery Cooperatives (number of fishery cooperatives in coastal areas) and Statistical Table of Fishery Cooperatives (trading value of sales business) (the Fisheries Agency), and data prepared by the National Federation of Fishery Cooperatives (number of fishery cooperatives that opted for merging).

Trends in the Volume and Percentage of Fish and Fishery Product Distribution Through Wholesale Markets in Consuming Areas



Source: Wholesale Market Database (Ministry of Agriculture, Forestry and Fisheries)

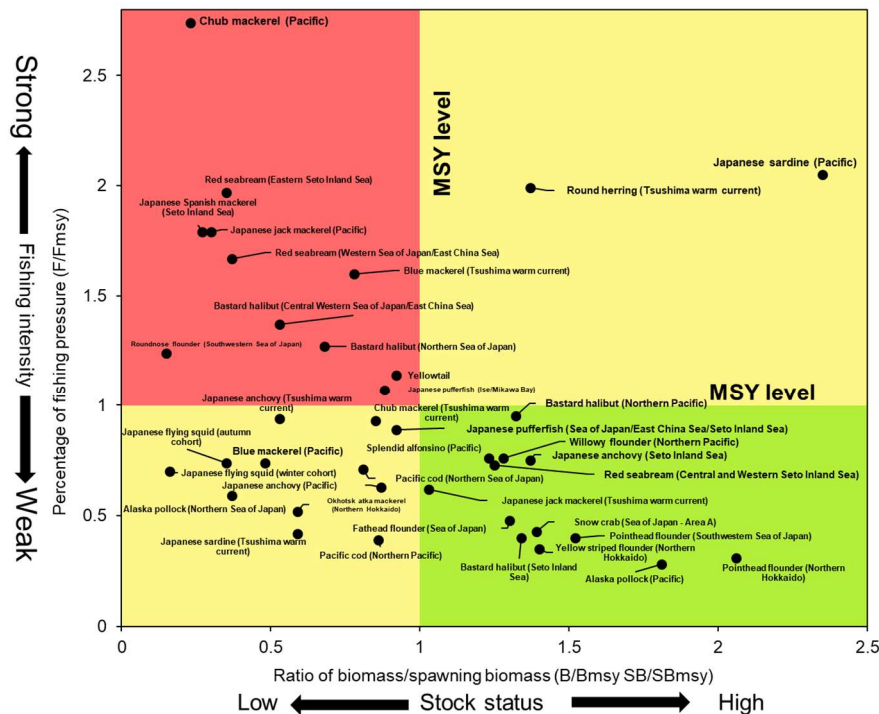
Chapter 3 Trends in Fisheries Resources and the Fishing Ground Environment

(1) Fisheries Resources in the Waters Around Japan



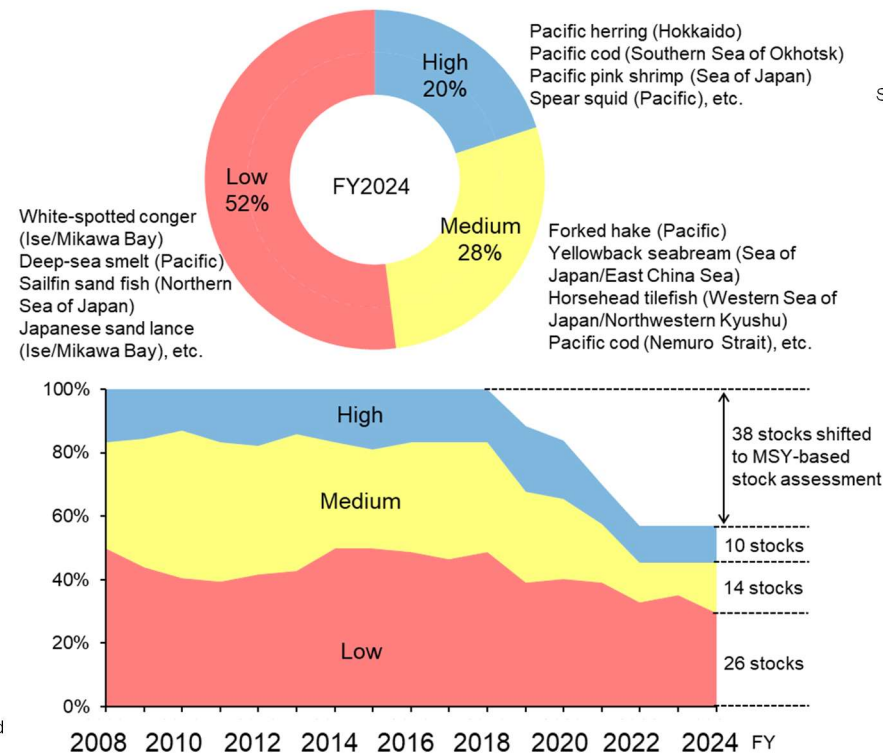
- To manage fisheries resources, it is important to take appropriate management measures based on stock assessment.
- The number of species subject to stock assessment was expanded from 50 in FY2018 to 192 in FY2021.
- Among the species subject to stock assessment, the stock status and fishing intensity of 38 stocks of 22 species were estimated by FY2024 for the purpose of achieving the MSY (Maximum Sustainable Yield).
- Also, for 50 stocks of 36 species, stock assessment was conducted with three levels of stock condition applied: high, medium, and low.

Stock Assessment Based on MSY



Source: Prepared by the Fisheries Agency based on the Assessment of Fisheries Resources in the Waters Around Japan (Fisheries Agency and Japan Fisheries Research and Education Agency)

Stock Assessment with Three Levels of Conditions: High, Medium, and Low



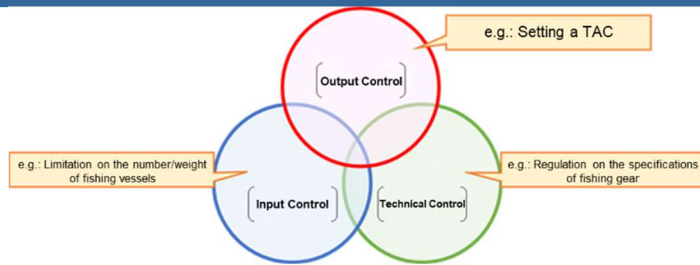
Source: Prepared by the Fisheries Agency based on the Assessment of Fisheries Resources in the Waters Around Japan (Fisheries Agency and Japan Fisheries Research and Education Agency)

Note: The number of species and stocks for which stock levels were assessed is as follows:
 FY2019: 80 stocks of 48 species excluding the 7 stocks of 4 species which were shifted to MSY-based stock assessment, such as mackerel
 FY2020: 73 stocks of 45 species excluding the 14 stocks of 8 species which were shifted to MSY-based stock assessment, such as Japanese jack mackerel and Japanese sardine
 FY2021: 61 stocks of 42 species excluding the 26 stocks of 17 species which were shifted to MSY-based stock assessment, such as Japanese anchovy and round herring
 FY2022, FY2023, and FY2024: 50 stocks of 36 species excluding the 38 stocks of 22 species which were shifted to MSY-based stock assessment, such as Japanese pufferfish and splendid alfonsino

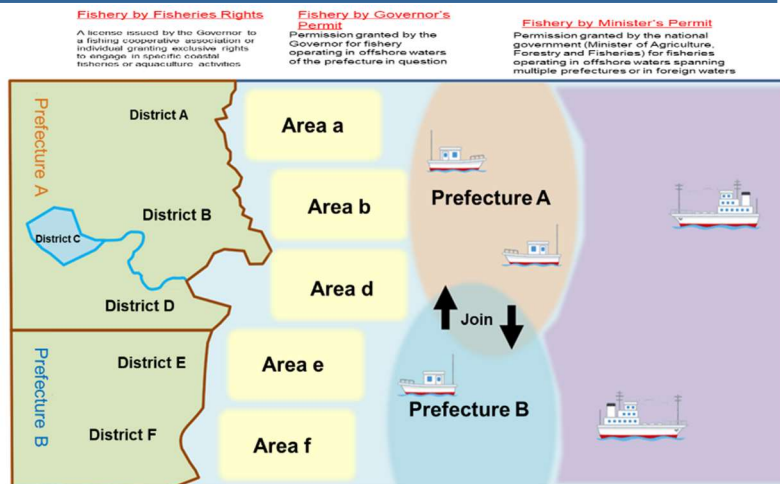
(2) Japan's Fisheries Resource Management

- Resource management refers to efforts aimed at promoting the sustainable use of fishery resources by adjusting fisheries activities (such as catch quantities) to maintain the necessary stock levels. Resource management techniques are categorized into three types: 1) input control, 2) technical control, and 3) output control (TAC management).
- Under the Fishery Act, the objective of resource management is to achieve the level at which the stock status should be maintained or recovered in order to achieve the MSY, with TAC (Total Allowable Catch) management employed as the primary technique for achieving this goal.
- In addition to TAC management, resource management is appropriately implemented by combining methods such as imposing restrictions on operation periods and fishing gear, while considering the characteristics of the resources and the conditions of the fisheries.
- Shellfish and algae harvesting, fixed net fishing, aquaculture, and inland water fisheries are managed under fishery rights systems. Offshore and distant fisheries are managed under fishing permit systems.

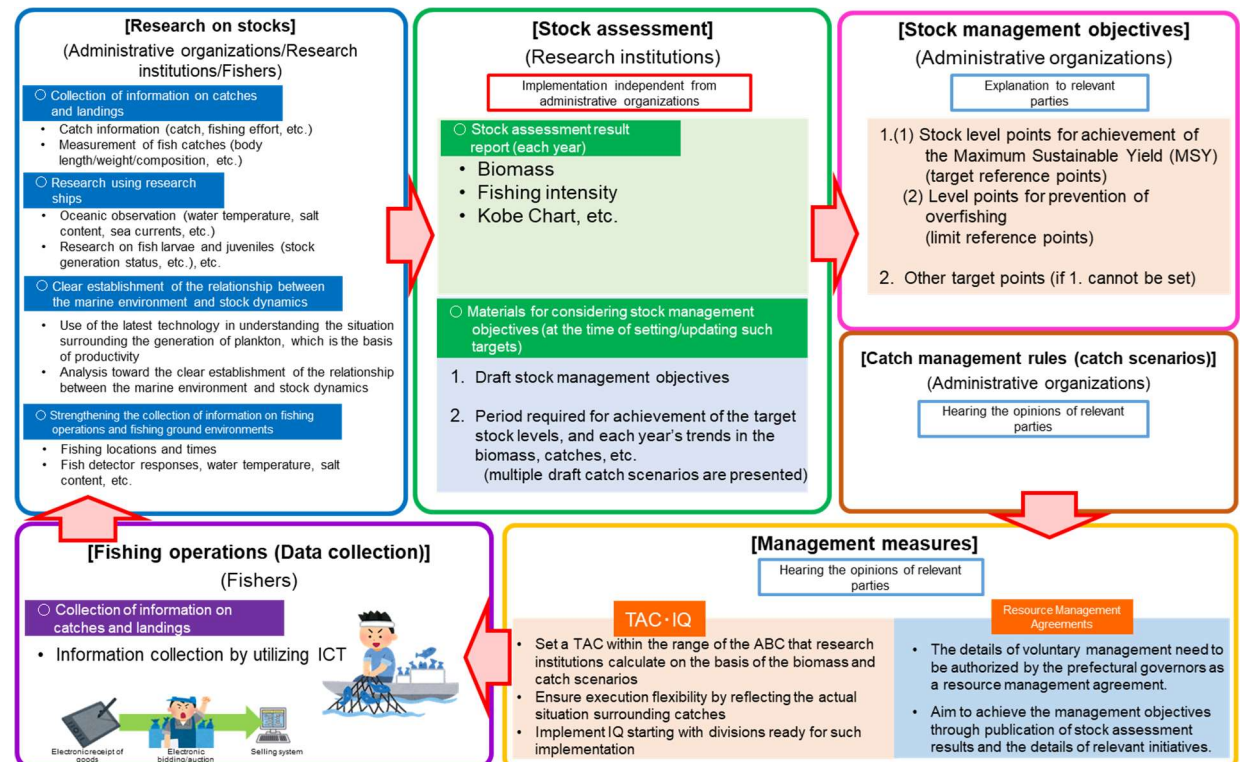
Correlation Between Resource Management



Conceptual Diagram of Fishery Rights System and Fishing Permit System



Flow of Resource Management



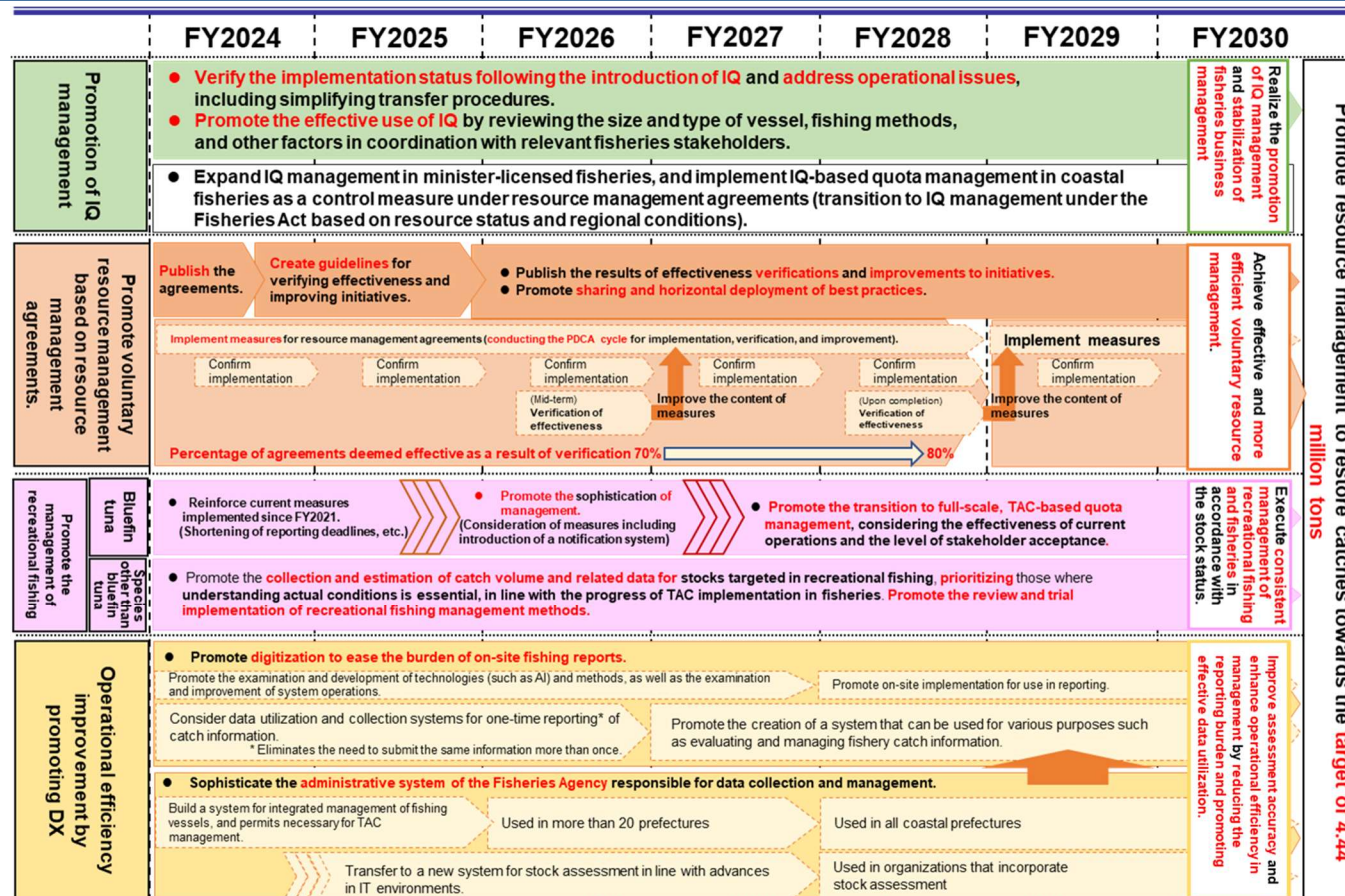
- In March 2024, the New Roadmap for Promoting Resource Management was published, setting targets and timelines for restoring catches to 4.44 million tons by FY2030. The roadmap outlines the following measures for the sophistication of research on resources and stock assessment and promotion of TAC management:
 - Strengthen surveys that contribute to advancing stock assessment and improving precision.
 - Expand the number of MSY-based species subject to stock assessment from 38 to approximately 45 stocks.
 - Start TAC management for 80% of catch-based stock by FY2025.

New Roadmap for Promoting Resource Management (sophistication of research on resources and stock assessment and promotion of TAC management)

		FY2024	FY2025	FY2026	FY2027	FY2028	FY2029	FY2030	
Sophistication of research on resources and stock assessment	(1) Research on resources	Strengthen research on resources to enhance the sophistication and accuracy of stock assessments by taking into account the impacts of changes in the marine environment on stocks Prioritize the collection of key biological and marine environmental data Promote the collection of information on catches and related activities of foreign fishing vessels Introduce and utilize ICT survey equipment and image analysis devices Expand into new species and sea areas Promote surveys that utilize fishing vessels to leverage the know-how of fishers Promote the adoption of new technologies, including ICT and AI-enabled survey equipment, for use on research vessels							Steadily promote more sophisticated stock assessment by considering the impacts of changes in the marine environment
	(2) Stock assessment	- For the 192 species subject to stock assessment, launch efforts to transition to a higher level of assessment based on the progress achieved * 1. MSY-based assessment, 2. Assessment based on abundance index, 3. Others MSY-based species subject to stock assessment 2023: 38 stocks → 2030: Approximately 45 stocks - Sophisticate data analysis and related techniques for MSY-based species subject to stock assessment, to improve the accuracy of stock assessments Conduct peer reviews by external experts from Japan and abroad Improve analysis methods and introduce new stock assessment models based on peer review comments - Conduct timely stock assessments using the latest (current year) data as they become available							
Promote TAC management based on MSY-based stock assessment	Expansion of TAC stock	- Start TAC management for 80% of catch-based (*1) stock by FY2025. (*1) Excludes fish caught in distant-water fishery, fish species managed under international frameworks (skipjack tuna, tuna and marlin), salmon and trout, shellfish, marine algae, sea urchins, and marine mammals. - Promote the introduction of TAC in the order of priority based on the progress of stock assessments, the significance of fisheries management and the regional economy, and resource trends. (Promote the introduction of TACs through a step-by-step approach to problem-solving, based on careful discussions with fisheries stakeholders)							Increase the biomass of more than 60% of species assessed using MSY-based methods to at or above MSY levels
	Operational improvement of TAC management	- Challenges in the smooth implementation of TAC management for stocks where TAC has been introduced, considering the characteristics of each stock and the actual conditions of the fisheries Address issues in collaboration with fisheries stakeholders (including responses to bycatch, sudden net entry, and shifts in migration patterns) * Improve operations related to management, flexibility and allocation within the management framework, enhance multi-species management, and advance the development, refinement, and dissemination of fishing gear and techniques to reduce bycatch. * Make efforts to horizontally deploy operational improvements developed to address various issues to other TAC-managed stocks as needed. * Promote consultation and cooperation among relevant countries and related RFMOs. - Review management objectives and catch scenarios after TAC introduction as needed. - Monitor the implementation status of management, compile successful case studies, and share the outcomes.							
	International stock	- For fish species subject to international quota management, promote the introduction of TACs as appropriate to ensure alignment with international agreements, while maintaining compliance with TACs and other resource management measures within Japan. - Establish a system to strengthen the management of bluefin tuna catches. Require fishers and distributors to report and retain catch information.							
		Promote resource management to restore catches towards the target of 4.44 million tons							

- The following measures are outlined to promote IQ management, voluntary resource management, recreational fishing management, and digitalization.
 - Review the IQ implementation status to address operational issues while expanding IQ management in minister-licensed fisheries.
 - Increase the proportion of agreements deemed effective through verification of Resource Management Agreements to 80% by FY2028.
 - For bluefin tuna in recreational fishing management, strengthen the existing measures and advance management to support the transition to TAC-based management. For stocks other than bluefin tuna, promote efforts to collect data on catch volumes.
 - Promote digitization to ease the burden of on-site fishing reports and enhance the Fisheries Agency's data collection and management systems.

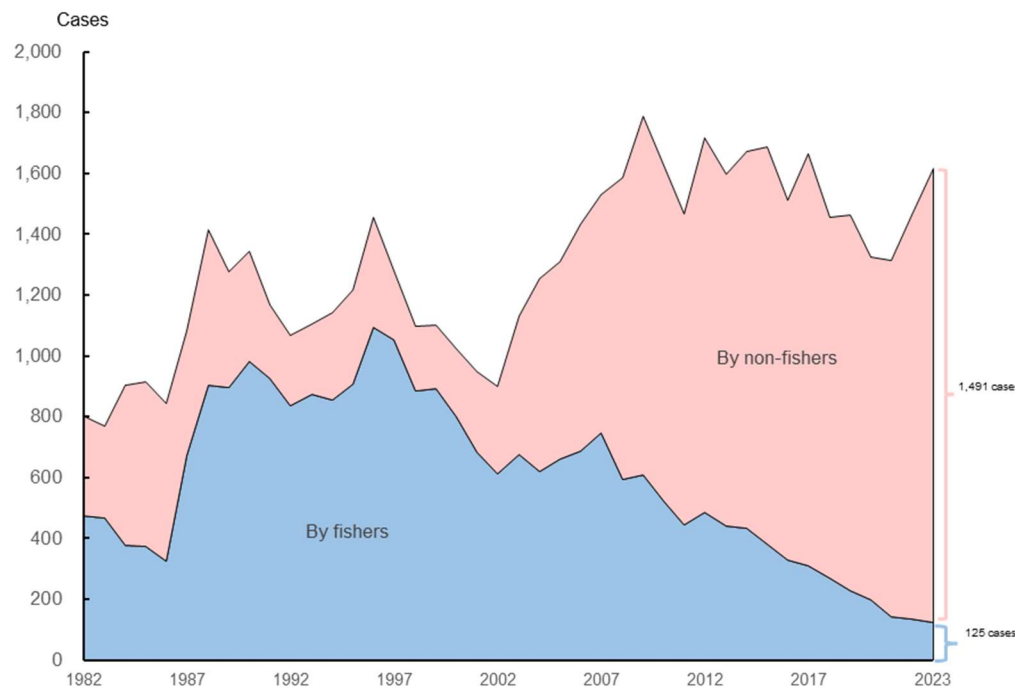
New Roadmap for Promoting Resource Management (promotion of IQ management, voluntary resource management, and recreational fishing management)



(3) Initiatives for Practical and Effective Resource Management

- The nationwide number of arrests for poaching was 1,716 in 2023 (of which 1,653 were in marine fisheries and 63 in inland fisheries). The number of poaching cases by non-fishers has significantly exceeded the number by fishers and has become more aggressive and cunning.
- The Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants aims to prevent illegally caught or gathered aquatic animals and plants from entering distribution channels. Domestically, the Act requires fishers and others handling specified aquatic animals and plants to complete procedures such as notifying relevant administrative organizations and communicating catch numbers.
- In 2024, based on the results of the Fisheries Agency's inspections of foreign fishing vessels, etc., seven on-board inspections were conducted, one vessel was seized, and 18 cases involved the confiscation of illegal fishing gear.

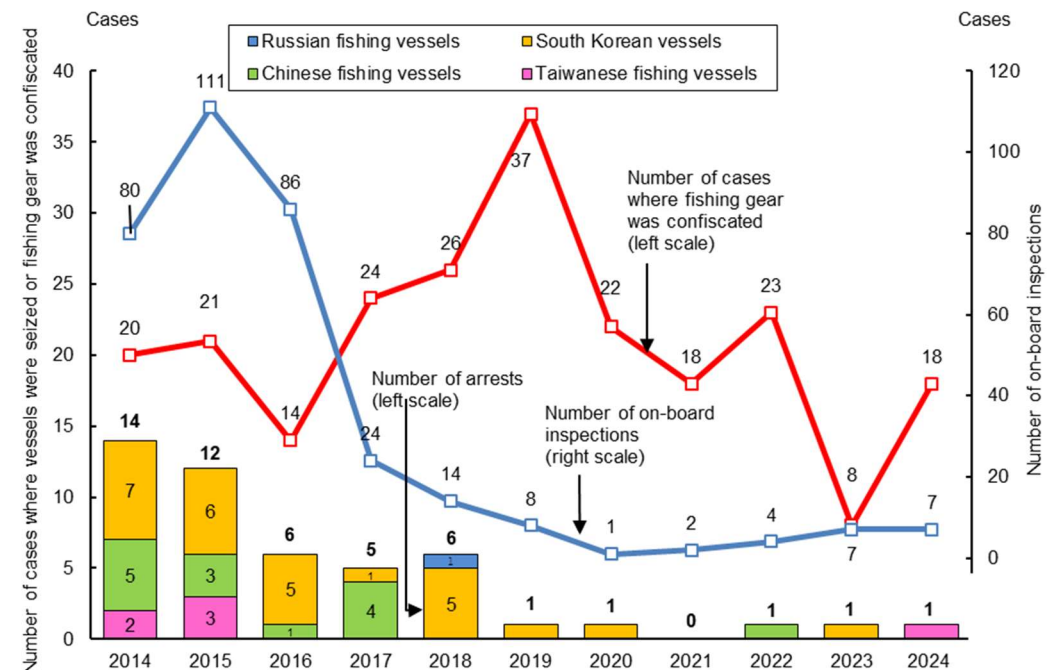
Trends in the Number of Arrests for Violation of Fisheries-Related Laws and Regulations in Japan's Marine Regions



Source: Survey by the Fisheries Agency

Note: The total for 2023 includes 37 cases involving unknown parties, as well as cases of collusion between fishers and non-fishers, in addition to those involving fishers and non-fishers.

Trends in the Number of Foreign Fishing Vessels, etc., Seized, Inspected, etc.



Source: Survey by the Fisheries Agency

Note: On-board inspection on the high seas is not included.

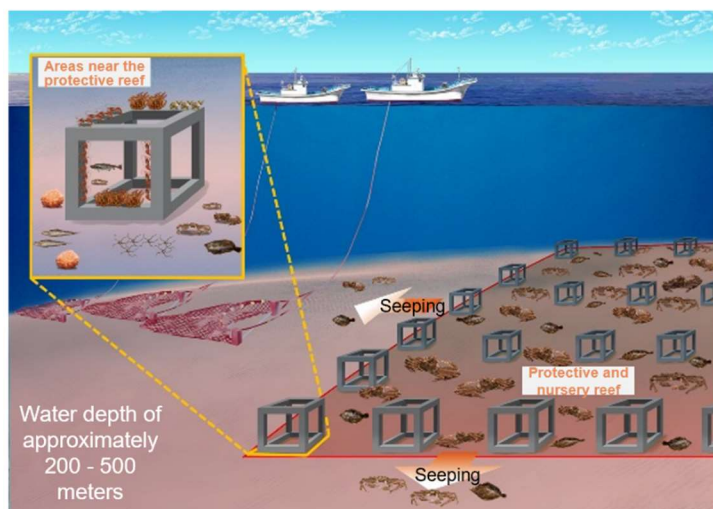
(4) Initiatives to Actively Enhance Fisheries Resources and Trends in the Fishing Ground Environment



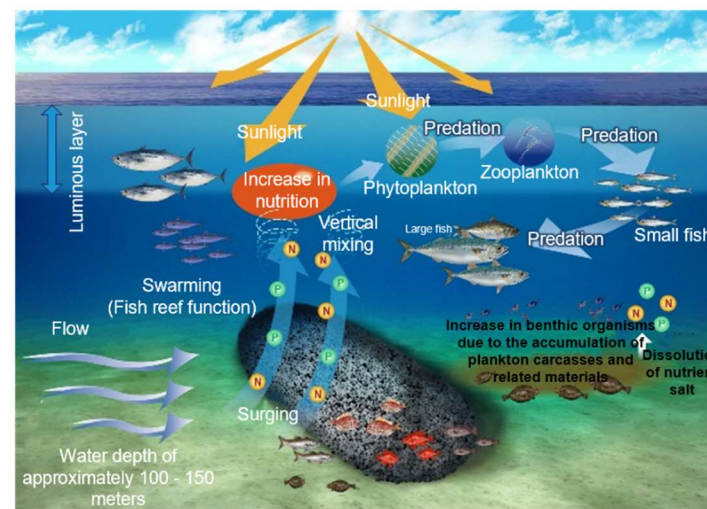
- The release of juvenile fish is carried out as part of resource management, primarily by prefectural aquaculture centers, targeting approximately 70 species nationwide, including flounder, red seabream, sea urchins, and abalones, while considering regional conditions and marine characteristics.
- In order to protect and increase fisheries resources, the Fisheries Agency has developed protective and nursery reefs and mound reefs.
- Nutrient salts, including nitrogen and phosphorus compounds, are essential for the growth of marine algae and the proliferation of plankton, which serve as food for fish, bivalves, and other marine organisms. In enclosed water areas, a decline in nutrient salts, among other factors, is believed to potentially contribute to issues such as the discoloration of cultured nori seaweed and a decrease in fish and shellfish populations, including Japanese sand lance. In the Seto Inland Sea, the nutrient salt management system established under the Act on Special Measures Concerning Conservation of the Environment of the Seto Inland Sea has facilitated the supply and management of nutrient salts, supporting a balance between water quality improvement and the sustainable use of marine resources.
- To rejuvenate the Ariake Sea, etc., measures are taken based on the Act on Special Measures Concerning Rejuvenation of the Ariake Sea, the Yatsushiro Sea, etc., to improve and conserve the marine environment and recover fisheries resources in these regions.
- Marine plastic litter not only affects the environment and ecosystems but also disrupts fishing operations, for instance by getting caught with fish catches. There are several measures initiated by the Fisheries Agency, such as 1) formulating guidelines to promote the systematic disposal of used fishing gear, 2) developing and enhancing gear made from environmentally friendly materials such as biodegradable plastics, and 3) encouraging fishers to retrieve marine litter in collaboration with the Ministry of the Environment, prefectural governments, and other relevant entities.

Image of protective and nursery reefs and mound reefs

(1) Mechanism of protective and nursery reef (Illustration)



(2) Mechanism of mound reef (Illustration)



Prototype and demonstration of floats using biodegradable plastics



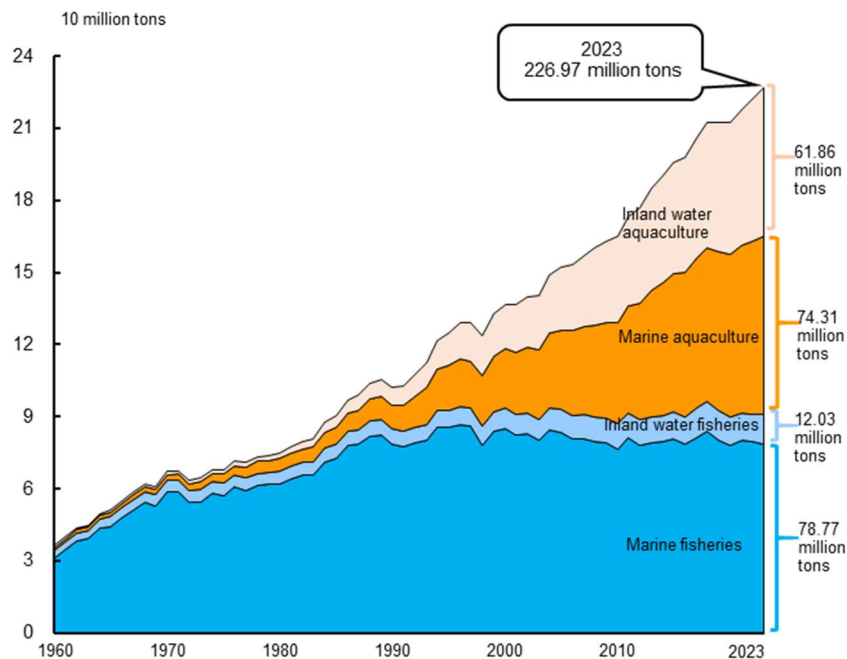
(Photos provided by the Clean Sea and Beach Foundation)

Chapter 4 International Situation Surrounding the Fisheries Industry

(1) Production of World Fisheries and Aquaculture

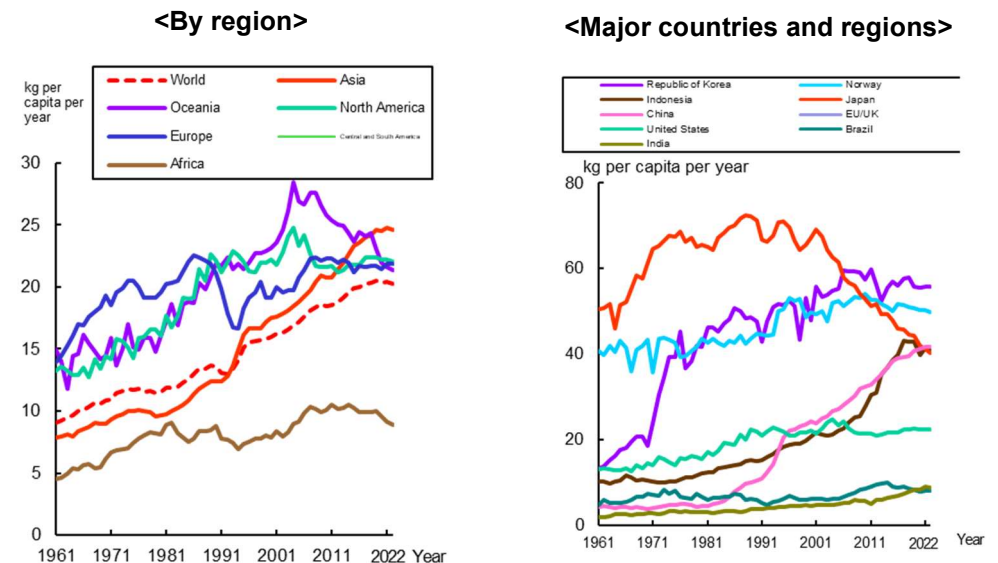
- The production volume of world fisheries and aquaculture has been on the rise. While fishery catches have remained flat, aquaculture production has been significantly increasing.
- In developed countries and regions including the EU/UK, the United States, and Japan, fishery catches have remained almost flat or seen a declining trend. In contrast, an increasing trend has been observed in developing countries including Indonesia and Vietnam.
- The aquaculture yield has been significantly increasing in China and Indonesia.
- The world's annual per-capita consumption of fish and shellfish as food has increased, whereas Japan's annual per-capita consumption has been on a declining trend.

Trends in the Production Volume of World Fisheries and Aquaculture



Source: Prepared by the Fisheries Agency, based on the Fishstat (Global capture production, Global aquaculture production) (FAO) (other than Japan) and the Fisheries and Aquaculture Production Statistics (Ministry of Agriculture, Forestry and Fisheries) (Japan)

Trends in the World's Annual Per-Capita Consumption of Fish and Fishery Products as Food (Gross Food Based)



Sources: Prepared by the Fisheries Agency, based on the FAOSTAT (Food Balance Sheets) (FAO) (other than Japan) and the Food Balance Sheet (Ministry of Agriculture, Forestry and Fisheries) (Japan)

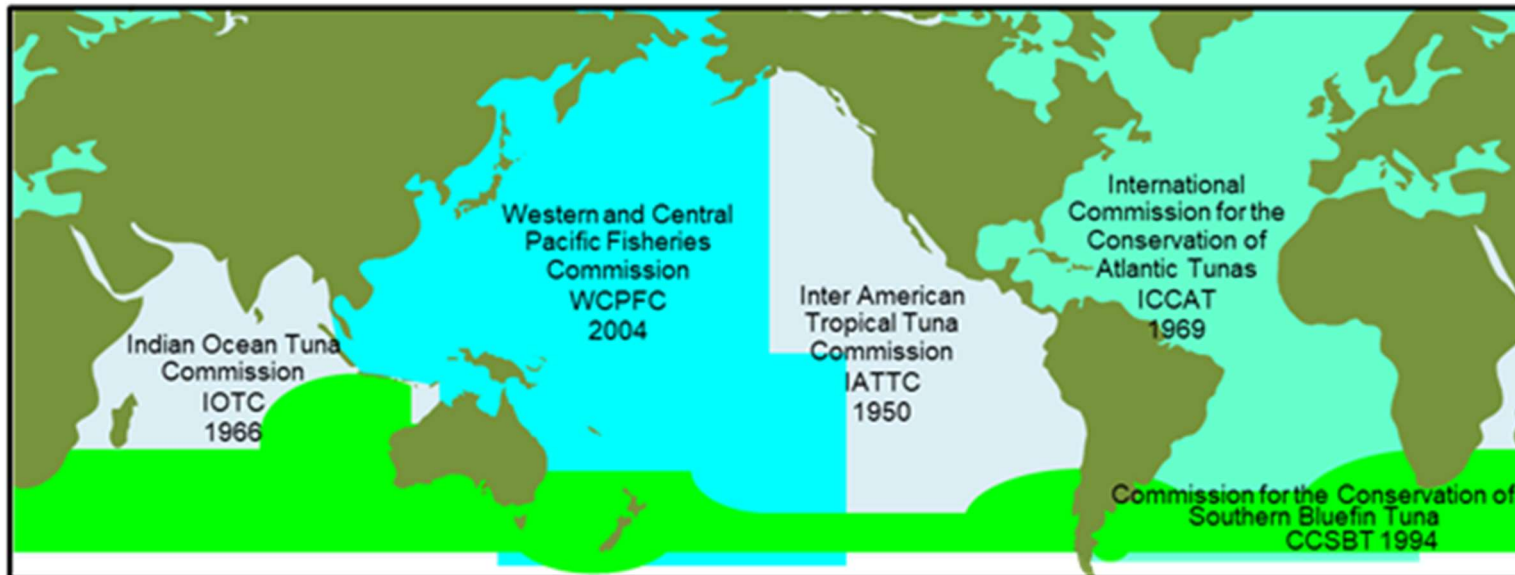
Notes: 1) "Gross food" refers to the amount of fish and shellfish for human consumption, including disposal volume.
2) Central and South America includes the Caribbean.

(2) International Resource Management

i. Trends in Regional Fisheries Management Organizations and Developments Toward Eliminating IUU Fishing

- As a result of resource management efforts since 2015, the spawning stock biomass of the Pacific bluefin tuna has been on a recovery path. At the 2024 WCPFC Annual Meeting, a measure was adopted to increase the catch limit for small fish by 10% and for large fish by 50%, effective after 2025.
- The North Pacific Fisheries Commission (NPFC), which manages resources such as Pacific saury and chub mackerel in the high seas of the North Pacific Ocean, has agreed on the following measures: (1) For Pacific saury, the 2025 TAC in the high seas will be reduced by 10% from the previous year to 121,500 tons, with coastal states implementing measures to limit catches within their EEZs to 81,000 tons or less; (2) For chub mackerel, the TAC in the high seas will be reduced by approximately 30%, from 100,000 tons in the previous year to 71,000 tons.
- Regional fishery management organizations have been promoting global initiatives toward curbing and eradicating illegal, unreported, and unregulated (IUU) fishing through the listing of fishing vessels and carriers confirmed to be involved in IUU fishing, implementation of catch documentation schemes, and other measures.
- Under the Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants, attaching catch certificates, etc. issued by foreign government agencies or other equivalents has become mandatory for the import of specified aquatic animals and plants, etc. as part of efforts to prevent IUU fishing on a global scale.

Regional Fisheries Management Organizations Managing Skipjack and Tuna and Waters Covered



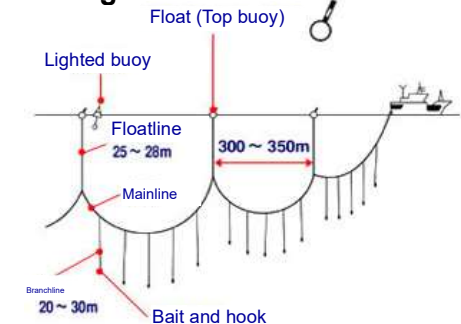
Note: The years listed are the years in which the relevant treaties took effect.

Pacific bluefin tuna



Source: Status of International Fisheries Resources in FY2023 (Japan Fisheries Research and Education Agency)

Tuna longline fisheries



Source: Japan Fisheries Association

ii. Bilateral Relations in Fisheries

- Japan has concluded bilateral agreements on fisheries with Russia, the Republic of Korea, and China.
- In relation to Russia, fishing vessels of Japan and Russia conducted fishing operations in 2024 based on the Japan-USSR Offshore Fishery Agreement, the Japan-USSR Fishery Cooperation Agreement, and the Kaigara Island Kelp Agreement. With regard to negotiations based on the Framework Agreement on Fishery Operations in the Waters Surrounding the Northern Islands, the Russian side has not taken part in talks on fishing operations since 2023, and the situation remains unchanged.
- Mutual fishing access with the Republic of Korea and China is currently suspended.
- Talks were held with Taiwan to improve fishing operation rule in the applicable waters based on the Japan-Taiwan Private Fisheries Arrangement. Regarding fishing operation rule for the 2025 fishing season, the rule clearly stipulates measures on the Taiwan side to prevent fishing gear from drifting into waters where Japanese fishing vessels operate.

(3) Developments Concerning Whaling



- Japan withdrew from the International Convention for the Regulation of Whaling (ICRW) at the end of June 2019 and resumed commercial whaling of large whales in July of the same year.
- Necessary measures are being taken based on the “Basic Policy of Measures for Ensuring the Sustainable Use of Whales” formulated in October 2020.
- In July 2024, Japan added the fin whale, which is abundant in the North Pacific Ocean, to the list of species targeted for commercial whaling based on the results of research surveys.
- Japan conducts scientific research on whales in cooperation with international organizations such as the International Whaling Commission (IWC), thereby contributing to the management of whale stocks based on scientific knowledge.

Commercial whaling target species and catch quotas and number in 2024

	Factory ship type whaling			Coastal base type whaling		
	Bryde's whale	Sei whale	Fin whale	Common minke whale	Bryde's whale	Baird's beaked whale
Catch limit	175	25	59	142	12	58
Number captured	175	25	30	87	4	39
Fisheries Agency reserves	0	0	0	0	0	0

Fin whale



Source: Condition of Whaling (Fisheries Agency)

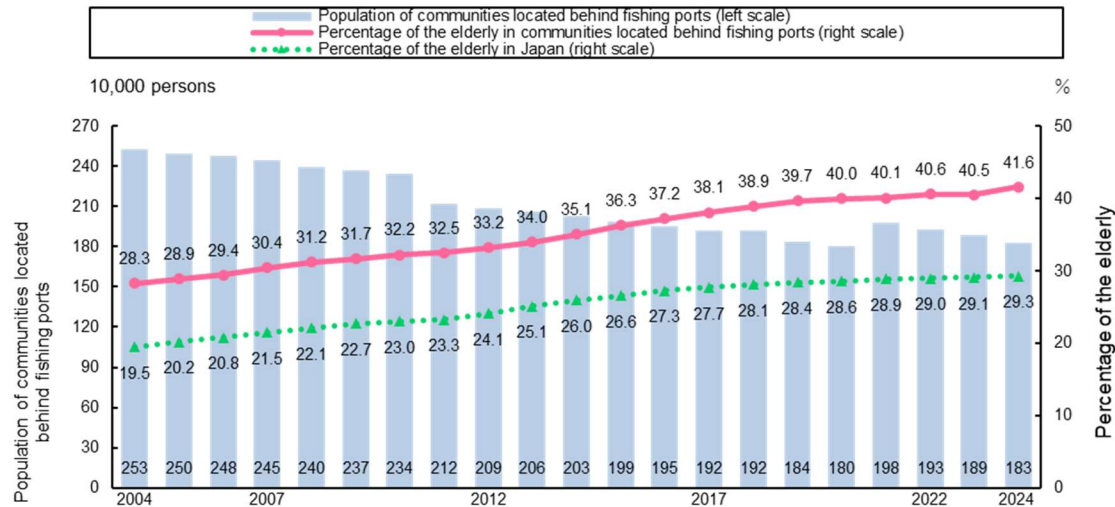
Chapter 5 Trends in the Revitalization of Fishing Communities

(1) Current Status and Role of Fishing Communities



- Often situated in areas with limited transportation and highly vulnerable to natural disasters, fishing communities frequently face challenges in life outside fisheries, which has resulted in population decline and aging. The percentage of the elderly in fishing communities is approx. 12 percentage points higher than the national average.
- The fisheries industry and fishing communities serve multiple roles, including preserving the natural environment, protecting the lives and property of the nation, providing spaces for community interaction, and supporting the formation and continuity of local communities. The benefits of these roles extend widely to the general public.
- The Fisheries Agency supports initiatives that promote the diverse functions carried out by fishers and other stakeholders, including the conservation of seaweed beds and tidal flats, the maintenance and enhancement of inland water ecosystems, border and water area surveillance, and maritime rescue training.

Population and Percentage of the Elderly in Communities Located behind Fishing Ports



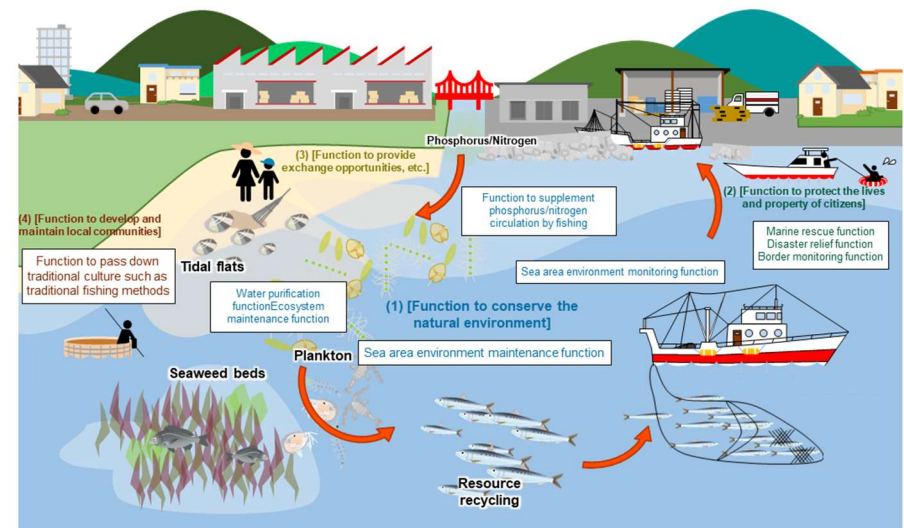
Sources: Prepared by the Fisheries Agency (population and percentage of the elderly in communities located behind fishing ports), and the Population Estimates (the figures for each of the years in which a census was taken are based on census population) (Ministry of Internal Affairs and Communications)

Notes: 1) The percentage of the elderly refers to the population aged 65 years or older in proportion to the total population in each category.

2) The population of communities located behind fishing ports and their percentages of the elderly for 2011-2020 do not include data on three prefectures (Iwate, Miyagi, and Fukushima).

3) The percentages of the elderly in the 2015 and 2020 census are based on estimated values.

Multifaceted Functions of Fisheries and Fishing Communities



Source: Prepared by the Ministry of Agriculture, Forestry and Fisheries, based on a report of the Science Council of Japan (only excerpts related to the fisheries industry and fishing communities)

(2) Promotion of UMIGYO/Creating Safe Fishing Communities that Provide a Sense of Security

- While the vitality of fishing communities has been declining due to factors such as population decrease and aging, the number of non-residents visiting these areas from urban centers has been increasing in recent years.
- UMIGYO, which refers to “projects that leverage the value and appeal of the local resources of marine and fishing communities,” aims to secure income and employment opportunities by maximizing the use of regional assets and existing fishing port facilities while ensuring harmony with fisheries use, and by fostering and establishing UMIGYO as a complementary industry to the marine sector.
- In April 2024, the revised Act on the Development of Fishing Ports and Grounds came into effect, including the establishment of a program to utilize fishing ports and related facilities to revitalize the fisheries industry and fishing communities by leveraging their value and appeal based on their intended fisheries-related use.

Facilities Intended to Facilitate Exchange Such as Factory-Direct Stores Selling Fish and Fishery Products in Fishing Ports and Communities Behind Those Ports Across Japan, and the Non-Resident Population in Fishing Communities

	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023
Facilities intended to facilitate exchange such as factory direct-sale stores selling fish and fishery products (sites)	1,390	1,451	1,490	1,458	1,473	1,474
Non-resident population in fishing communities (1,000 persons)	20,024	20,222	18,558	20,108	23,420	23,710

Source: Survey by the Fisheries Agency

Major initiatives of UMIGYO



Eating place at a fishing port (Hota Fishing Port, Chiba Prefecture)



Fishery experience (Tajiri Fishing Port, Osaka Prefecture)

UMIGYO poster



海業(うみぎょう)とは、海や漁村の地域資源の価値や魅力を活かした事業で、地域のくまわりや活性化と雇用を創出するもの。漁港での水産物の販売や利用の提供、観光、漁業体験等。

水産庁

- The Fisheries Agency has established the “UMIGYO Support Package,” which compiles relevant policies for engaging in UMIGYO, along with the “UMIGYO Promotion Main Consultation Service (UMIGYO Promotion Concierge),” a central contact point offering comprehensive guidance on UMIGYO promotion. The Agency also actively supports initiatives in “Districts Working on the Promotion of UMIGYO.”
- In addition, three mascot characters, including the “UMIGYO Goodwill Ambassador,” were created to promote UMIGYO and highlight the appeal of fishing ports. These characters are featured on the Fisheries Agency’s website, social media platforms, and at related events to raise awareness of UMIGYO.
- To prepare for large-scale earthquakes and tsunamis, and increasingly severe and frequent typhoons and low-pressure systems, it is essential to promote preliminary disaster prevention and mitigation measures in fishing ports and communities. The government is promoting the development of disaster prevention hubs in fishing ports, enhancing earthquake, tsunami, and wave resistance of fishing port facilities, and improving evacuation routes.

Fishing port mascot characters used to promote UMIGYO



Umi-nyago
Fishing port guide



Gyokkon
UMIGYO goodwill
ambassador



Umi-gyo
UMIGYO fairy

Case example: Improving facilities, expanding fishery experience, and other measures to increase the number of visitors from urban areas (Hokkaido)

- The Habomai Fishery Cooperative in Hokkaido organizes stays at the fisher’s home and operates panoramic cruises for viewing migratory birds and whales, attracting many participants from around the world.
- The Cooperative also collaborates with a travel agency to organize tours that include visits to a kelp processing facility, a factory direct-sales store, and meals at a cooperative-run eating place, along with a hands-on kelp harvesting experience as part of a monitoring project aimed at addressing labor shortages.
- The Association has been strengthening its capacity to accommodate the growing number of visitors from urban areas, contributing to a steady increase in tourist numbers.



Panoramic cruise



Visit to a kelp processing
facility



Stay at fisher’s home

Chapter 6 Restoration/Reconstruction after Large-Scale Disasters and Developments Concerning Discharge of ALPS Treated Water

(1) Status of Restoration/Reconstruction After the Great East Japan Earthquake in the Fisheries Industry

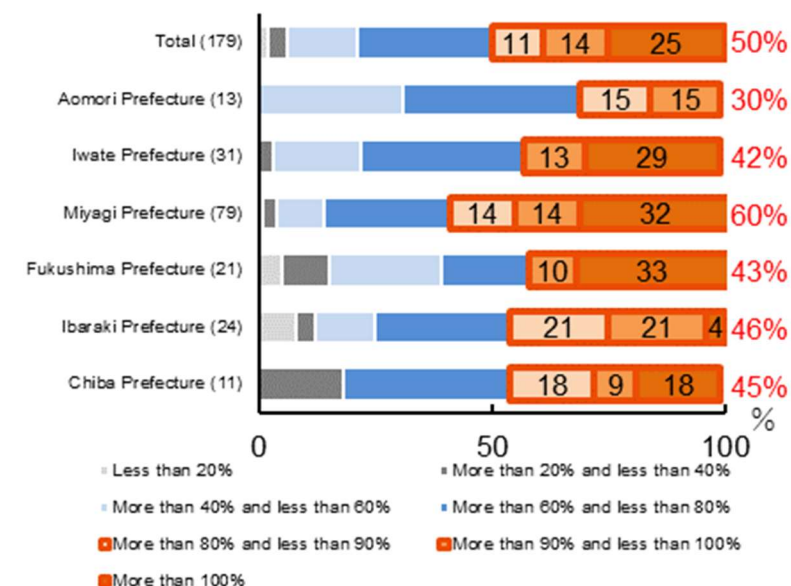
- Since the Great East Japan Earthquake struck in March 2011, the restoration of fishing port facilities, fishing vessels, aquaculture facilities, fishing grounds, and other facilities has been carried out in the affected areas. Fisheries-related infrastructures such as fishing port facilities and fishery processing facilities have mostly been restored in full.
- On the other hand, the recovery of the fishery processing industry's sales remains an issue. The government continues to support initiatives such as the recovery/development of markets for the fishery processing industry.

Summary of Restoration/Reconstruction of the Fisheries Industry Following the Great East Japan Earthquake (as of March 2025)

1 Landings	- YoY impact of the disaster on landings in major fish markets in Iwate, Miyagi, and Fukushima Prefectures in 2024 (Landing value) 91% (the highest value after the earthquake was 96% in 2023) (Landing volume) 54% (the highest value after the earthquake was 79% in 2014)	
2 Fishing ports	- The restoration of landing piers and fishing port facilities has been completed at all fishing ports affected by the disaster.	
3 Fishing vessels	(Number of vessels restored) 18,763 - In Iwate and Miyagi Prefectures, the restoration of fishing vessels for fishers who wished to have them restored was completed by the end of FY2015. - Systematic restoration efforts are underway in Fukushima Prefecture.	
4 Aquaculture	- All aquaculture facilities that sought to resume operations were fully operational by the end of June 2017.	
5 Processing and distribution facilities	(Fishery processing facilities) - 99% of fishery processing facilities that sought to resume operations have done so. (Wholesale markets in landing areas) - All impacted wholesale markets in landing areas have resumed operations.	
6 Debris	- Number of fishing grounds impacted by debris affecting fisheries activities and number of fishing grounds cleared (Fixed net fishing ground) - Debris removal has been completed in all affected fishing grounds. (Aquaculture fishing ground) - Removal was completed in 1,135 out of 1,140 fishing grounds.	

Notes: 1) The landing volume and value for the year prior to the disaster are based on actual data from March 2010 to February 2011, while the figures for 2024 are based on actual data from February 2024 to January 2025. The results for Fukushima Prefecture are preliminary figures.
2) The number of affected fishing ports is the total number for seven prefectures. Fishing port facilities refer to piers, breakwaters, anchorages, roads, etc.
3) The number of restored fishing vessels is the total number for 21 prefectures. The figures are as of the end of December 2024.
4) Regarding wholesale markets among processing and distribution facilities, four markets among the 12 affected in Fukushima Prefecture were consolidated.
5) The number of fishing grounds where debris has been cleared is as of January 2025.

Status of Sales Recovery by Fishery Processors

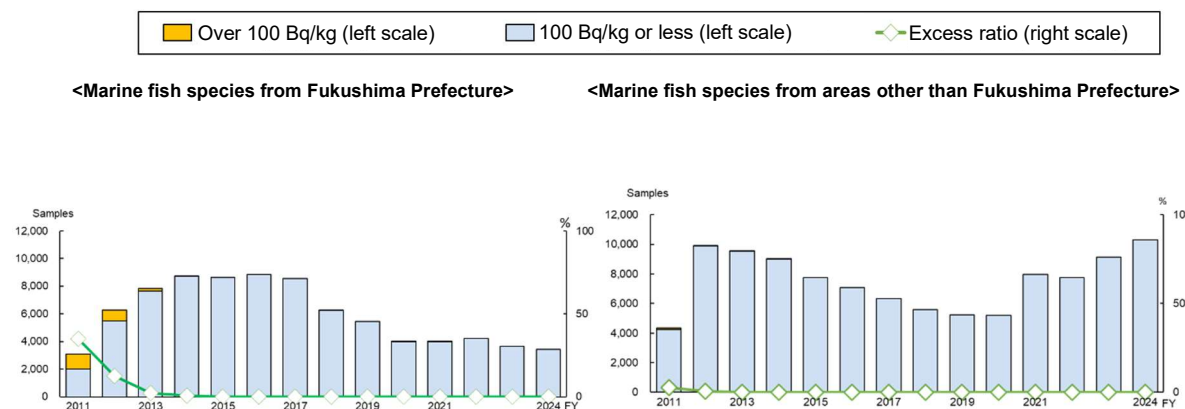


Source: Prepared from the 11th survey of seafood processing businesses on restoration from the Great East Japan Earthquake (Fisheries Agency)
Note: The figures in red indicate recovery rates of 80% or higher.

(2) Response to the Impact of the Accident at TEPCO's Fukushima Daiichi Nuclear Power Plant

- The national government, in cooperation with relevant prefectural governments and fisheries-related organizations, conducts systematic monitoring of radioactive materials in fish and fishery products.
- Levels exceeding the Japanese maximum levels in food (JMLs) have not been detected for marine fish species from Fukushima Prefecture since February 2022, and for freshwater species since December 2022. In other prefectures, no exceedances have been detected for marine fish species since September 2014 and for freshwater species since May 2020.
- Efforts have been made to improve the reliability and transparency of data with the support of the International Atomic Energy Agency (IAEA). A report published by the IAEA in March 2025 on the results of sample analysis stated that "Sample collection procedures follow the appropriate methodological standards required to obtain representative samples." and "Japanese laboratories have reported accurate results that demonstrate a high degree of proficiency."
- To collect basic information for the full resumption of fishing, limited scale of fishing and sale on trial basis were conducted off the Fukushima coast until the end of March 2021. In 2024, the catch volume was 6,640 tons (26% of the pre-disaster level in 2010), and the catch value was 3.6 billion yen (39% of the pre-disaster level), indicating that recovery is still ongoing.
- Import restrictions on Japanese food products were initially imposed by 55 countries and regions, but this number has since declined to six. In FY2024, as a result of Japan's efforts to urge countries and regions to lift these restrictions, Taiwan notably has eased its restrictions.

Monitoring Results of Radioactive Materials in Fish and Fishery Products (Radioactive Cesium)



Note: As of the end of March, 2025

Outline of Import Restrictions on Food Products, etc., Imposed by Foreign Countries and Regions in Connection with the Nuclear Power Plant Accident (As of January 2025)

Type of measures and number of countries or regions*			Name of countries or regions
Introduced additional measures after the accident	Lifted all the measures	49	Canada, Myanmar, Serbia, Chile, Mexico, Peru, Guinea, New Zealand, Colombia, Malaysia, Ecuador, Vietnam, Iraq, Australia, Thailand, Bolivia, India, Kuwait, Nepal, Iran, Mauritius, Qatar, Ukraine, Pakistan, Saudi Arabia, Argentina, Turkey, New Caledonia, Brazil, Oman, Bahrain, Congo DR, Brunei, Philippines, Morocco, Egypt, Lebanon, United Arab Emirates, Israel, Singapore, USA, UK, Indonesia, EU, Iceland, Norway, Switzerland, Liechtenstein, French Polynesia
	Remaining the measures	6	Russia, Taiwan
	Test certificate requirement	2	
55	Import ban	4	China, Hong Kong, Macau, Korea

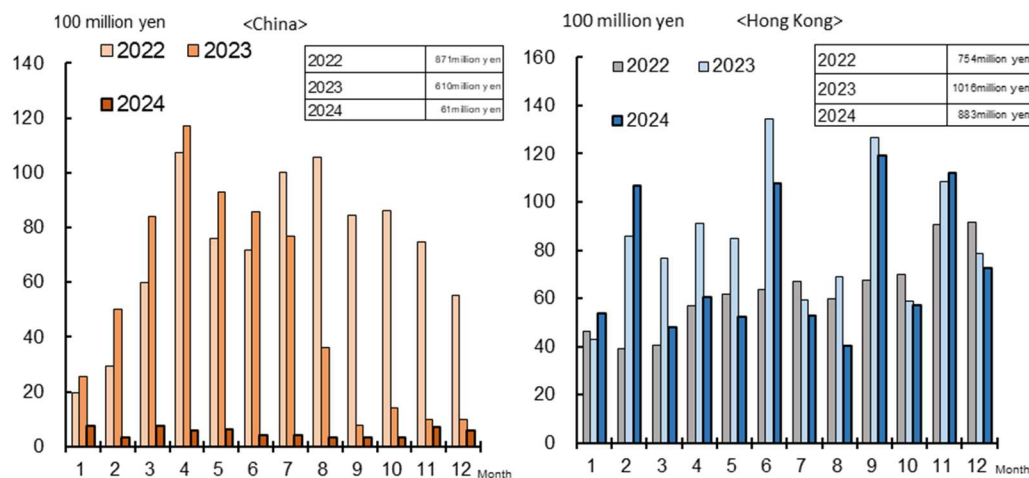
* The countries and regions are classified according to the substance of their restrictions. Prefectures and items subject to restrictions differ depending on countries and regions.

* Following the discharge of ALPS treated water into the sea, China and Russia suspended the import of fish and fishery products from all prefectures; Hong Kong suspended the import of fish and fishery products, etc., from 10 prefectures; and Macao suspended the import of fresh food, etc., from 10 prefectures.

(3) Developments Concerning Discharge of ALPS Treated Water into the Sea

- Since the commencement of discharge of ALPS treated water into the sea on August 24, 2023, China and Russia have suspended the import of fish and fishery products from all prefectures, and Hong Kong and Macao have suspended the import of fish and fishery products, etc., from 10 prefectures. Due to the strengthening of import restrictions, the value of fish and fishery products exported to China has dropped sharply since August 2023, decreasing by 30% in 2023 and by 93% in 2024 compared to 2022 levels.
- In August 2023, the Fisheries Agency introduced a method that enables tritium analysis to be completed in a short period (rapid tritium analysis), in addition to the ongoing monitoring analysis of fishery products targeting tritium (precise tritium analysis), which had been conducted prior to the start of discharge of ALPS treated water into the sea. Analysis results of rapid tritium analysis are published by the day after the day following sampling. Both the precise and rapid analyses showed tritium levels below the detection limit, with no changes observed between before the release and after the release.
- In September 2024, Japan and the IAEA concurred in conducting the additional measures under the IAEA framework, based on the interest of all stakeholder countries. With regards to the discharge of ALPS treated water and the import restrictions on Japanese fish and fishery productions by China, the “Shared Recognition between Japan and China” was announced. In March 2025, the Ministers for Foreign Affairs of Japan and China concurred on promoting relevant consultations towards the resumption of imports of Japanese fish and fishery products. Japan has continuously been urging countries and regions that maintain import restrictions to lift them immediately.
- The Fisheries Agency is supporting the following initiatives targeting fish and fishery products affected by import restrictions. Specifically, these include initiatives to expand domestic consumption by supplying seafood products to school meals, initiatives by fishers to reduce fuel costs to sustain domestic production, initiatives to diversify export destinations, and initiatives to introduce equipment to strengthen domestic processing systems.

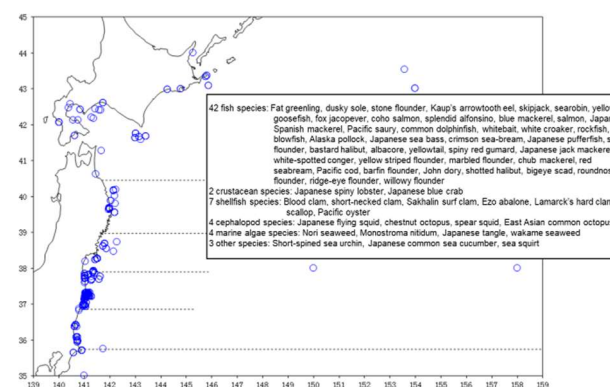
Trends in the Value of Fish and Fishery Products Exported to China and Hong Kong



Source: Prepared by the Fisheries Agency, based on the Foreign Trade Statistics (Ministry of Finance)

Sampling Locations for Monitoring of Radioactive Materials in Fish and Fishery Products (Tritium)

< precise tritium analysis >

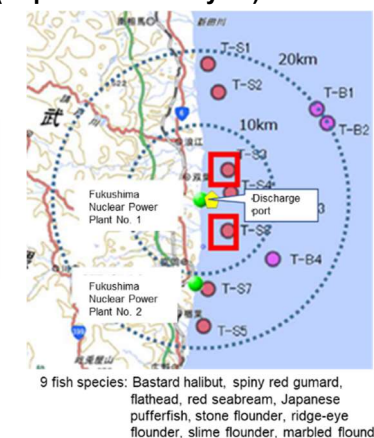


Source: Survey by the Fisheries Agency

Notes 1) The sample collection locations for precise tritium analysis are Hokkaido, Aomori, Iwate, Miyagi, Fukushima, Ibaraki, and Chiba Prefectures.

2) The sample collection locations for rapid tritium analysis are two points (in red frames) located approximately 5 km north and south of the ALPS treated water discharge outlet (modification of a material for a meeting of the Heads of Cooperatives in Fukushima Prefecture).

(Rapid tritium analysis)



(4) Promotion of Initiatives for the Restoration/Reconstruction after the 2024 Noto Peninsula Earthquake

i Situation of Damage Related to the Fisheries Industry

- On January 1, 2024, an earthquake with its epicenter in the Noto Peninsula region of Ishikawa Prefecture caused damage to the fisheries sector across four prefectures—Niigata, Toyama, Ishikawa, and Fukui—resulting in total losses amounting to 107.83 billion yen (as of March 31, 2025).
- Fishing port facilities, including breakwaters, piers, loading areas, and port access roads, sustained damage. In the Sotoura District centered around Wajima City and Suzu City in Ishikawa Prefecture, severe damage to fishing port facilities occurred due to ground subsidence and other factors.
- Fishing vessels were affected by incidents such as capsizing, sinking, grounding, and drifting. Numerous vessels were unable to set sail due to ground uplift that left them grounded or exposed the seabed within fishing ports.

Situation of Fisheries-Related Damage

Main damage	Number of cases of damage	Damage value
Fishing port facilities	73 ports	100.32 billion yen
Fishing vessels	366 vessels	410 million yen
Common facilities	94 facilities	4.87 billion yen
Aquaculture facilities	8 cases	350 million yen
Fishing gear	83 cases	300 million yen
Wholesale market/processing facility	10 cases	
Others	- Damage to piping at Fisheries Research Center - Tilting of the fishery cooperative association building caused by liquefaction - Subsidence of oyster shucking hut, drainage problems - Rupture of piping at deep sea water intake facility - Juvenile sea cucumbers washed away from aquarium on land - Mass death of juvenile salmon	

Source: Prepared by the Fisheries Agency, based on reports from Ishikawa, Toyama, Niigata, and Fukui Prefectures



Subsidence and cracking of loading area by the earthquake
(Ishizaki Fishing Port, Ishikawa Prefecture)



Berth damaged by the earthquake
(Ryotsu Fishing Port, Niigata Prefecture)



Pier damaged by the earthquake and a fishing vessel stranded by the tsunami
(Ukai Fishing Port, Ishikawa Prefecture)



Goods handling facility damaged by the earthquake
(Mizuhashi Fishing Port, Toyama Prefecture)

ii Initiatives for Restoration/Reconstruction of Fisheries Industry

- An urgent survey was conducted based on the “Package to Support the Lives and Livelihoods of the Affected People,” which was compiled by the government on January 25, 2024. The survey assessed damage to fishing port facilities and other infrastructure as part of the restoration and reconstruction measures in fisheries and related fields. Additional restoration measures include the early repair of fishing ports, beaches, and related areas; the regeneration and recovery of fishing grounds by fishers; and the restoration of fishing vessels, fishing gear, aquaculture facilities, and shared fisheries industry infrastructure (such as goods handling, freezing, and refrigerating facilities).
- With the gradual resumption of fishing operations, the catch value for the six municipalities in the northern part of the Noto Peninsula in Ishikawa Prefecture (Wajima City, Suzu City, Anamizu Town, Noto Town, Nanao City and Shika Town) in 2024 was 7,316 million yen, 66% of the value in the same period last year, while the catch volume was 13,096 tons, 54% of the figure in the same period last year. Additionally, during the autumn-winter snow crab fishing season, the catch value reached 3,477 million yen, 97% of the previous year’s level, and the catch volume was 3,652 tons, 93% of the previous year. In Toyama Prefecture, the landing volume at Himi and Shin-Minato Fishing Ports in 2024 was 7,257 tons, representing 78% of the previous year’s total.
- Given the limited expertise in restoring and reconstructing fishing port facilities damaged by ground uplift, the “Technical Review Meeting on the Restoration and Reconstruction of Fishing Areas Affected by the 2024 Noto Peninsula Earthquake” was held from May to July 2024. The findings were shared with Ishikawa Prefecture and outlined restoration approaches in two phases: temporary restoration for the short-term resumption of livelihoods, and full-scale restoration aimed at medium/long-term functional improvement, along with restoration methods and procedures tailored to specific damage patterns.
- The government has implemented measures for the restoration and reconstruction of entire fishing communities, including fishing ports, fishing grounds, fishing vessels, and aquaculture facilities, as well as the rebuilding of the fisheries, fishery processing, and distribution industries, with the goal of helping those affected in the fisheries industry overcome hardships and resume operations with hope and a clear outlook for the future.

(5) Response to Forest Fires in Ofunato City, Iwate Prefecture

- The forest fire that occurred in Ofunato City, Iwate Prefecture, in late February 2025 burned approximately 2,900 hectares of forest (as of March 28, 2025, under investigation).
- The fire caused significant losses in the fisheries industry, including the destruction of fishing gear and fixed nets stored in warehouses at Ryori Fishing Port, as well as disruptions of wakame seaweed cultivation.
- On April 4, 2025, the Minister of Agriculture, Forestry and Fisheries, along with other government officials, visited the affected area, met with fishers, explained the disaster-related support measures, and publicly announced the details.
- The Ministry of Agriculture, Forestry and Fisheries will continue to implement restoration measures in collaboration with Iwate Prefecture and Ofunato City.

(Appendix) Main KPIs for Fisheries Policy

Sector	KPI	Status of progress (As of the end of 2024)	Plan, etc., in which the KPI is stated
Fisheries	Aims to recover catch to the same level as in 2010 (4.44 million tons) by 2030 (Reference: Catch in 2018 was 3.31 million tons).	Catch (excluding marine algae and marine mammals) in 2023 was 2.89 million tons, which was 65% of the goal.	MIDORI Strategy for Sustainable Food Systems (formulated in May 2021), and New Roadmap for Promoting Resource Management (decided in March 2024)
Aquaculture	Aims to establish a sustainable aquaculture production system without any burden on natural resources by achieving an artificial seedling rate of 100% in aquaculture of Japanese eel, bluefin tuna, etc., and by switching all fish feed to formula feed by 2050.	The artificial seedling rate (in aquaculture of Japanese eel, bluefin tuna, greater amberjack, and yellowtail) was 4.7% in 2023. The rate of formula feed was 49% in 2023.	MIDORI Strategy for Sustainable Food Systems
Aquaculture	Aims to achieve the following production volumes of the strategic aquaculture items by 2030. - Yellowtail: 240,000 tons - Red seabream: 110,000 tons - Bluefin tuna: 20,000 tons - Salmon and trout: 30,000-40,000 tons - New fisheries species (groupers, etc.): 10,000-20,000 tons - Scallops: 210,000 tons (- Pearls (2027 goal): 20 billion yen)	The production volumes in 2023 were as follows (% indicates comparison with the goal). - Yellowtail: 120,000 tons (50%) - Red seabream: 70,000 tons (64%) - Bluefin tuna: 20,000 tons (100%) - Salmon and trout (silver salmon only): 20,000 tons (50-67%) - Scallops: 150,000 tons (71%) (- Pearls: 28 billion yen (140%))	Comprehensive Strategy for the Transformation of Aquaculture into a Growth Industry (formulated in July 2020, revised in July 2021)
Export	Aims to increase the export value of fish and fishery products to 1.1 trillion yen by 2030 (Cabinet decision of April 2025) (Of which the export value of each of the priority export items in 2030 is aimed to be: - Yellowtail: 73.6 billion yen - Red seabream: 20.4 billion yen - Scallops: 115 billion yen - Pearls: 47.2 billion yen - Nishikigoi: 10 billion yen)	The export value of fish and fishery products in 2024 was 360.9 billion yen, which was 33% of the 2030 goal.	The figures included in the goals for the export value of agricultural, forestry, and fishery products and food in the Basic Plan for Food, Agriculture and Rural Areas (decided by the Cabinet in March 2020) and the Basic Policy on Economic and Fiscal Management and Reform 2020/Follow-up on the Growth Strategy (decided by the Cabinet in July 2020); and the Comprehensive Strategy for the Transformation of Aquaculture into a Growth Industry
Overall fisheries industry	FY2032 goals for the self-sufficiency rates of fish and fishery products: - Fish and shellfish for human consumption: 94% - Overall fish and shellfish: 76% - Marine algae: 72%	The self-sufficiency rates of fish and fishery products in FY2023 (estimates): - Fish and shellfish for human consumption: 54% - Overall fish and shellfish: 52% - Marine algae: 65%	Basic Plan for Fisheries (decided by the Cabinet in March 2022)
Overall fisheries industry	Aims to establish technologies for electrification and hydrogen battery use for fishing vessels by 2040.	Specifications decided for hydrogen battery-powered test vessel for aquaculture operations	MIDORI Strategy for Sustainable Food Systems

Structure of “FY2025 Fisheries Policy”

Overview

Focus of measures, fiscal measures, legislative measures, tax measures, financial measures, and policy assessment

I. Steady implementation of fisheries resource management, taking into account changes in marine environments

- Enhancement of research on resources and stock assessment
- Steady promotion of resource management
- Enhancement of fisheries enforcement and of the surveillance capability/poaching monitoring system
- Adaptation to changes in marine environments

II. Realization of transformation of fisheries into a growth industry, taking increasing risks into account

- Structural reform, etc., of maritime fisheries
- Transformation of aquaculture into a growth industry
- Business management stabilization measures
- Export expansion and development of fishing ports and fishing grounds to support transformation of fisheries into a growth industry
- Inland water fisheries/aquaculture
- Human resource development
- Work safety measures

III. Promotion of revitalization of fishing communities that support the region

- Seashore regeneration/revitalization
- Restoration/Strengthening of the management foundation of fishery cooperative organizations
- Development of measures for processing, distribution, and consumption
- Fulfillment of multifaceted functions of fisheries and fishing communities
- Conservation of fishing ground environments and maintenance of ecosystems
- Measures for disaster prevention/mitigation and building national resilience

IV. Measures to be promoted in a cross-sectoral manner for sustainable development of fisheries

- Strategy for Sustainable Food Systems: MIDORI and fisheries policy
- Utilization of smart fishery technologies
- Carbon neutrality

V. Restoration/Reconstruction after the Great East Japan Earthquake and support for the fisheries industry in connection with the discharge of ALPS treated water into the sea

- Steady restoration/reconstruction in areas affected by the Great East Japan Earthquake and tsunami
- Impact of the discharge of ALPS treated water into the sea and support for the fisheries industry
- Restoration/reconstruction after the 2024 Noto Peninsula Earthquake

VI. Requirements for the comprehensive and systematic promotion of fisheries policies

- Efficient promotion of measures through collaboration among relevant ministries and agencies
- Management and assessment of the progress of measures
- Implementation of measures from a public point of view, taking into account the needs of consumers and the public
- Compilation of statistics in line with policy needs and promotion of the use of such statistics
- Helping business owners and producers become independent and demonstrate their originality and ingenuity
- Efficient and focused operation of fiscal measures

