

FY2025
White Paper on Fisheries
Summary

June 2026
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.

Table of Contents

FY2025 Trends in Fisheries

Special Issue Measures for Transforming Aquaculture into a Growth Industry

Section 1 Establishment of an Aquaculture Technology-Oriented Nation ...	1
Section 2 Initiatives in the Eel Aquaculture ...	6
Section 3 Future Potential of the Aquaculture Industry—Land-based Aquaculture— ...	8

Topics

Topic 1 Strengthening of Functions of Fishery Mutual Aid for Promoting Complex Fisheries and Transformation of Aquaculture into a Growth Industry ...	9
Topic 2 100th Year of Showa: Modern Whaling that Supported the Period of Rapid Economic Growth ...	10
Topic 3 Initiatives for Eliminating IUU Fishing ...	11
Topic 4 Securement of Players in the Fisheries Industry ...	12

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 ...	13
(2) Status of the Consumption of Fish and Fishery Products and Initiatives to Expand Consumption ...	14
(3) Trends in the Trade of Fish and Fishery Products ...	15

Chapter 2 Trends in Japan's Fisheries Industry

(1) Trends in Domestic Fisheries and Aquaculture Production ...	17
(2) Trends in Management of Fisheries ...	18
(3) Fishery Workers and Fishery Working Environments, and Utilization of Technologies for Promoting Smart Fisheries ...	19
(4) Trends in Fishery Cooperatives, and Trends in the Processing and Distribution of Fish and Fishery Products ...	20

Chapter 3 Trends in Fisheries Resources and the Fishing Ground Environment

(1) Japan's Stock Assessment ...	21
(2) Japan's Fisheries Resource Management ...	22
(3) Initiatives for Effective Fisheries Resource Management ...	25
(4) Initiatives for Fisheries Resources Enhancement and Trends in the Fishing Ground Environment ...	26

Chapter 4 International Situation Surrounding the Fisheries Industry

(1) International Fisheries Resource Management ...	27
(2) Developments Concerning Whaling ...	29

Chapter 5 Trends in the Revitalization of Fishing Communities

(1) Current Status and Roles of Fishing Communities ...	30
(2) Promotion of UMIGYO ...	31

Chapter 6 Restoration/Reconstruction after Large-Scale Disasters

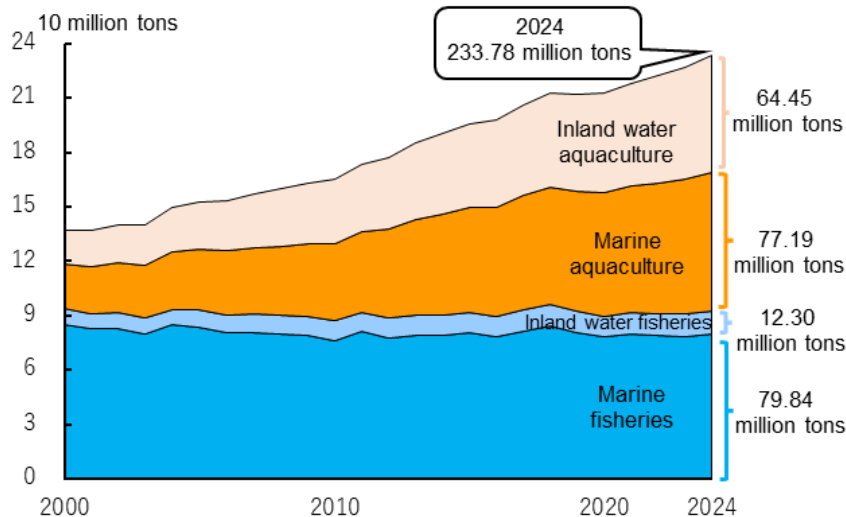
(1) Status of Restoration/Reconstruction after the Great East Japan Earthquake in the Fisheries Industry ...	32
(2) Response to the Impact of the Accident at TEPCO's Fukushima Daiichi Nuclear Power Station ...	32
(3) Initiatives toward Full-scale Fishing Operations off the Coast of Fukushima Prefecture ...	32
(4) Promotion of Initiatives for the Restoration/Reconstruction after the 2024 Noto Peninsula Earthquake ...	33

Section 1 Establishment of an Aquaculture Technology-Oriented Nation

1. Trends in the Aquaculture Industry around the World

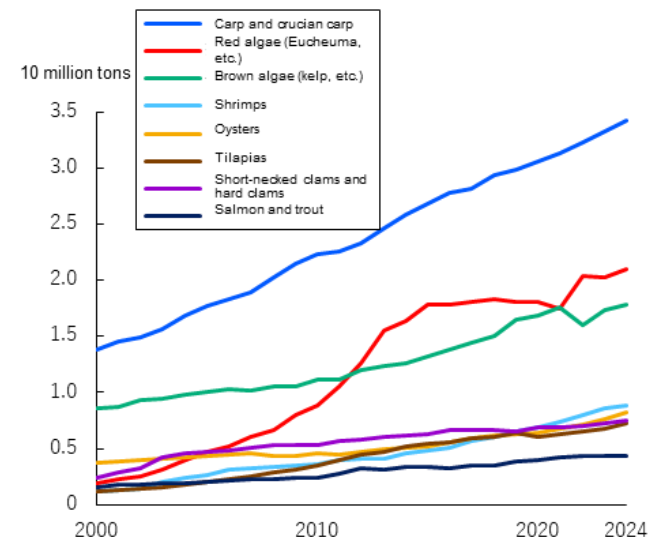
- The global production volume of fishery products has continued to increase. Aquaculture production volume has exceeded capture production volume in recent years, accounting for approx. 60% of the total production volume of fishery products in 2024.
- The increase in the production volume of the aquaculture industry on a global scale has been partially brought about by the expansion of production of diverse fish species, such as tilapia, whiteleg shrimp, catfish, etc., other than carp and crucian carp, in China, India, Vietnam, etc. The aquaculture industry is expected to further grow with demand expansion due to population increases.

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 Aquaculture Production Volume by Fish Species



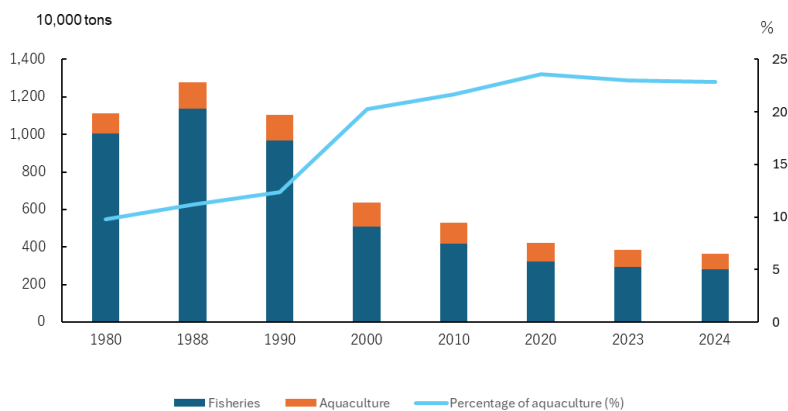
Source: Prepared by the Fisheries Agency based on the Fishstat (Global aquaculture production) (FAO) (other than Japan) and the Fisheries and Aquaculture Production Statistics (Ministry of Agriculture, Forestry and Fisheries) (Japan)

Section 1 Establishment of an Aquaculture Technology-Oriented Nation

2. Trends in Japan's Aquaculture Industry

- Japan's marine aquaculture has developed thanks to its national land extending from south to north and a variety of climatic conditions, centered on feeding aquaculture of fish and non-feeding aquaculture of algae and shellfish in quiet coastal waters. Major species are yellowtail and red seabream for fish, nori seaweed for algae, and oysters, scallops, and pearl oysters (for pearl culture) for shellfish. Major species for inland water aquaculture are eels and trout.
- Aquaculture production volumes for 2024 were approx. 280,000 tons for fish, approx. 280,000 tons for algae, and approx. 270,000 tons for shellfish, totaling approx. 830,000 tons.
- Fish aquaculture enables production under four fixed conditions (fixed quality, fixed amount, fixed price, and fixed time), in comparison with the capture of wild fish, and therefore, cultured fish is highly evaluated by mass retailers and the food-service industry.

Trends in the Fisheries/Aquaculture Production Volume and Trends in the Percentage of Aquaculture Production Volume in Japan



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

Buyers' Evaluation of Cultured Fish and Wild Fish

	Cultured fish	Wild fish
Time of supply	Controllable	Difficult to control
Supplied amount	Almost constant	Fluctuate
Price	Almost constant	Fluctuate
Quality Taste	Almost constant	Vary according to the season, fishing method, and way of processing

The time of supply, supplied amount, price, quality, and taste are constant for cultured fish. Accordingly, cultured fish is easier to handle for mass retailers and the food-service industry.

Source: Prepared by the Fisheries Agency based on the results of interviews with businesses and researchers by Suidosha Co. Ltd.

Section 1 Establishment of an Aquaculture Technology-Oriented Nation

3. Risks and Challenges toward Sustainable Development and Countermeasures [1]

- Rising sea temperatures and other changes in the marine environment caused the mass death of oysters in the Seto Inland Sea and scallops in Mutsu Bay. The government formulated a policy package consisting of three pillars: short-term measures, including support for business continuation; medium- to long-term measures for investigation into causes; and medium- to long-term measures toward the achievement of aquaculture responding to environmental changes.
- In fish aquaculture, feed is a significant factor that increases cost. As fish meal, a main ingredient in feed, depends on imports at present, efforts for the development of feed containing a smaller amount of fish meal, diversification of ingredients, and domestic production of fish meal are to be promoted and studies on feed derived from insects and microalgae are to be expanded.
- Marine aquaculture is easily affected by weather conditions and faces difficulties in securing personnel due to a delay in mechanization and restrictions in places of residence. In order to address these challenges, the Fisheries Agency offers support for initiatives to enhance production management by the use of ICT and AI.

Support for the Oyster Aquaculture Industry, which Faced the Mass Death of Oysters

- ✓ In response to the mass death of oysters due to high sea temperatures, etc. that occurred centered on the Seto Inland Sea, the relevant ministries and agencies jointly formulated a policy package.
- ✓ Support is also provided to the scallop aquaculture industry with regard to the mass death of scallops for which high sea temperatures are considered to be a common cause.



Dead oysters (Provided by Kure City, Hiroshima Prefecture)

Policy Package against Damage due to the Mass Death of Oysters Caused by High Sea Temperatures

December 11, 2025

Fisheries Agency; Financial Services Agency; Immigration Services Agency; Ministry of Health, Labour and Welfare; Ministry of Finance; National Tax Agency; Ministry of Economy, Trade and Industry; Ministry of Land, Infrastructure, Transport and Tourism; and Ministry of the Environment

[Case Example] Aquaculture of Red Seabream with Formula Feed Containing Black Soldier Fly and Microalgae

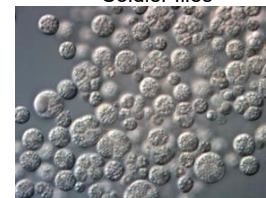
- ✓ The Japan Fisheries Research and Education Agency is developing a new formula feed using insects and microalgae
- ✓ By providing domestically-produced feed made of insects (Black Soldier Fly) and microalgae (Aurantiochytrium) to red seabream, it was confirmed that they grow in the same manner as those fed with conventional feed made of fish meal.



Soldier flies



Formula feed



Aurantiochytrium
(Provided by the Japan Fisheries Research and Education Agency)

Section 1 Establishment of an Aquaculture Technology-Oriented Nation

3. Risks and Challenges toward Sustainable Development and Countermeasures [2]

- At coastal areas, places available for an aquaculture site are limited and increasingly overcrowded fish cages deteriorate water quality and increase the risks of fish disease and red tide damage. In order to address these challenges, the Fisheries Agency offers support for initiatives, including that for a shift to large-scale offshore aquaculture, which has an advantage in that water quality is stable and the risk of red tide damage is smaller.
- Breeding to create lines with useful characteristics, such as rapid growth, disease-resistance, and superiority in feed efficiency, is important for improving productivity. Therefore, it is necessary to promote breeding also from the perspective of achieving a stable supply without putting an unnecessary burden on natural resources. Nissui Corporation has succeeded in the development of fast-growing yellowtail, thereby increasing the hatchery-produced seeds rate and reducing the dependence on natural juvenile fish.
- Red tide causes significant damage to aquaculture. Fishers take such measures as conducting monitoring of sea conditions and moving fish cages as necessary. The Fisheries Agency will continue offering support for the creation of monitoring systems for mitigating damage.

[Case Example] Large-scale Offshore Aquaculture of Yellowtail

- ✓ Under the demarcated fishery rights in Kushima City, Miyazaki Prefecture, a demonstration experiment was conducted using large submersible fish cages from January 2021 to December 2025.
- ✓ As a result, (i) the reduction of feeding cost by the use of large fish cages, (ii) the reduction of facility renewal costs by the use of fish cages made of high-density polyethylene, etc., and (iii) the washing of a wide range of nets by the use of a large net washing robot were achieved, and labor for net washing was reduced significantly.



Large submersible fish cage



Large net washing robot

(Provided by Kurosesuisan Co., Ltd.)

[Case Example] Breeding of Red Tide Resistant Yellowtail

- ✓ Selection breeding of red tide resistant yellowtail by the Japan Fisheries Research and Education Agency



Section 1 Establishment of an Aquaculture Technology-Oriented Nation

4. For Transforming Aquaculture into a Growth Industry

- In Japan, domestic demand for fishery products is expected to decline in the long term due to population decline, while global demand and trade in fishery products are expected to expand alongside population growth and economic development. Therefore, the aquaculture industry has an opportunity to reduce its reliance on domestic demand, expand its sales channels in global markets, and improve its profitability through overseas business development.
- The Marine Ecology Research Institute has been developing mass-production technology of highly nutritional initial prey using domestic *Parvocalanus crassirostris*, and the Fisheries Agency has supported it. *Parvocalanus crassirostris* is zooplankton that juvenile fish of yellowtail, etc. eat in nature. It is expected that strong hatchery-produced seeds closer to natural ones will be bred by giving *Parvocalanus crassirostris*.
- Japan has superior technologies applicable to aquaculture, and holds an overwhelming share in global terms regarding yellowtail aquaculture, in particular, with advanced, high added value. Also with regard to salmon and trout, which are highly dependent on imports, technological development for domestic aquaculture has been advanced, and the reduction of dependence on imports and strengthening of competitiveness of Japanese domestic fisheries industry are expected.

[Case Example] Initiatives for Expanding Exports of Cultured Bluefin Tuna

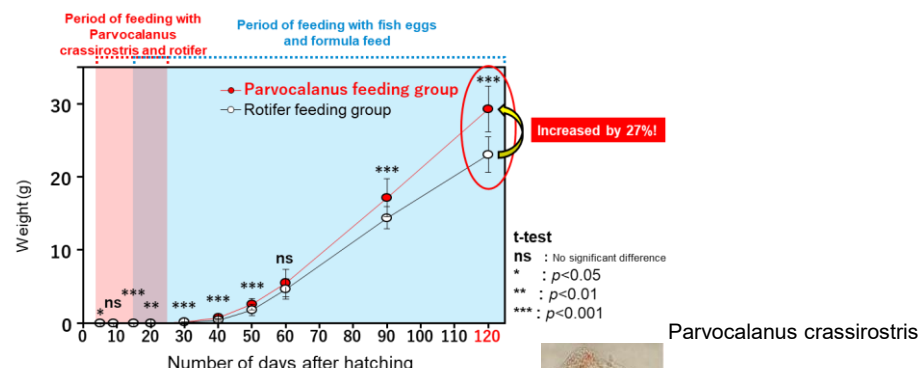
- ✓ In collaboration with producers, Tsuji suisan Co., Ltd. (Uwajima City, Ehime Prefecture) has developed high-quality farmed Pacific bluefin tuna through careful management of feed quality, water temperatures, and harvesting procedures. The company has established the "DateMaguro" brand and registered its trademark in the United States.
- ✓ In addition to complying with the regulatory requirements of export destinations, the company has developed products based on a thorough market-in approach, and has continued exporting to the United States for more than ten years.
- ✓ In December 2024, the company was designated as a Flagship Export Production Area in recognition of its region-wide efforts to promote exports.



By processing the tuna within approximately two minutes after harvesting, and chilling with a seawater-ice mixture, the company preserves freshness. This approach enables the company to maintain high standards of safety and quality and produce premium-quality tuna.

(Provided by Tsuji suisan Co., Ltd.)

Preliminary Test for Producing Red Seabream Seedlings Using *Parvocalanus Crassirostris*



Results of the preliminary test to compare growth of seedlings fed with *Parvocalanus crassirostris* and seedlings fed with *Brachionus plicatilis* (rotifer)

(Provided by the Marine Ecology Research Institute)



Section 2 Initiatives in the Eel Aquaculture Industry

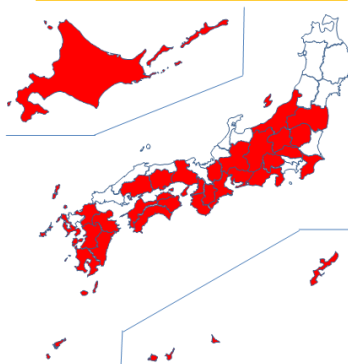
1. Eel Resource Management

- Japan had repeated discussions with China, Chinese Taipei, and South Korea with the aim of sustainably managing eel resources. The three countries and a region issued a joint statement in 2014, and have discussed every year on such matters as the upper limit on eel seed input into aquaculture ponds.
- In 2015, eel aquaculture industry came to be placed under a system requiring permission from the Minister of Agriculture, Forestry and Fisheries. The upper limit on the eel seed input into ponds is set for each permitted aquaculture producer, who is obliged to report the input, etc. to the Fisheries Agency.
- There had been disparities between catch volumes of juvenile eels and estimated volumes based on volumes of input into ponds due to unreported catch, poaching, etc. Accordingly, the prefectural governors' permission system was introduced for the catching of juvenile eels, and penalties were strengthened in 2023. Furthermore, the application of the Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants was commenced in December 2025.

Number of Permitted Cases of Japanese Eel Aquaculture and Quotas for Input into Ponds for the 2026 Fishing Season

Prefectures	Number of permitted cases	Quota for input into ponds (Unit: tons)
Chiba Prefecture	4	0.1
Shizuoka Prefecture	55	2.1
Aichi Prefecture	117	5.0
Mie Prefecture	7	0.4
Tokushima Prefecture	27	0.5
Kagawa Prefecture	18	0.1
Kochi Prefecture	20	0.6
Fukuoka Prefecture	17	0.1
Oita Prefecture	11	0.2
Kumamoto Prefecture	15	0.3
Miyazaki Prefecture	44	3.5
Kagoshima Prefecture	65	8.6
Others (19 prefectures)	37	0.2
National total	437	21.7

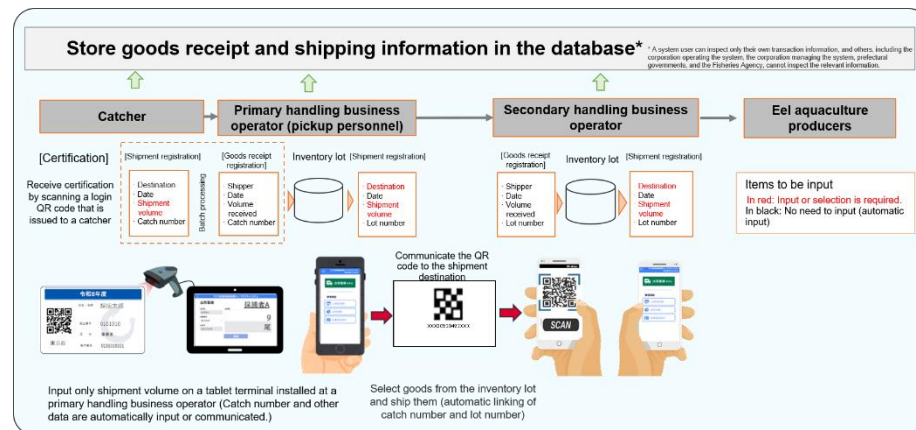
Permitted Japanese eel aquaculture producers: In 31 prefectures



Note: Permitted cases and quotas as of November 2025 were compiled by prefecture.

(Column) Responses to the Commencement of the Application of the Act to Class I Specified Aquatic Animals, Plants, etc.

- ✓ From December 2025, the Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants started to be applied to juvenile eels whose total length is 13 cm or less. Sellers are obliged to file a notification, communicate information, prepare and preserve transaction records, and attach a certificate at the time of export. The Fisheries Agency offered support for the development of the Glass Eel Traceability Support System and achieved efficiency enhancement.



Overview of the Glass Eel Traceability Support System (Provided by Denso Corporation)

Section 2 Initiatives in the Eel Aquaculture Industry

2. Advancement of Complete Aquaculture of Eels and International Situation Concerning CITES

- Japanese eel aquaculture depends on wild juvenile eels. The Fisheries Agency promotes the development of spawning and hatching technologies, and technologies concerning feed, rearing tanks, automatic feeding, breeding, etc., and facilitates social implementation of hatchery-produced seeds.
- The production cost for hatchery-produced seeds is higher than that for natural seedlings (approx. 1,800 yen for the former, and approx. 180 to 600 yen for the latter (as of 2023)). Therefore, further cost reduction is required for social implementation. The Fisheries Agency promotes technological development and improvement to achieve efficient and stable mass production.
- EU and other countries propose the inclusion of all species of eels in Appendix II of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES). Japan has clearly protested this proposal, advocating that a collective regulation based only on the status of resources and similarity is excessive. Relevant ministries and agencies worked together in providing explanations to related countries and international organizations, communicated information at committee meetings and various preliminary meetings relating to CITES, and carried out lobbying activities through diplomatic channels. As a result, this proposal was voted down at the CITES Conference of the Parties held from November to December 2025. At the conference, a resolution to promote conservation management of eels was adopted by consensus.

[Case Example] Demonstration Experiment for an Eel Seedling Mass Production System

- ✓ The Japan Fisheries Research and Education Agency, YANMAR Holdings Co., Ltd., and General Incorporated Association Marino Forum 21 jointly developed new Fiber-Reinforced Plastic (FRP) tanks for achieving mass production of eel hatchery-produced seeds, and succeeded in reducing the production cost to around one-twentieth of the conventional cost for producing approx. 1,000 eels per tank.
- ✓ Acquired a patent in December 2024



Developed tank for mass-producing eel seedlings
(Provided by the Japan Fisheries Research and Education Agency)

Results of the Vote at the Committee I at the 20th Meeting of the CITES Conference of the Parties

Results (Voting countries: 135)

Affirmative votes: 35 countries

Dissenting votes: 100 countries

* A proposal is voted down with dissenting votes exceeding one-third of all votes.



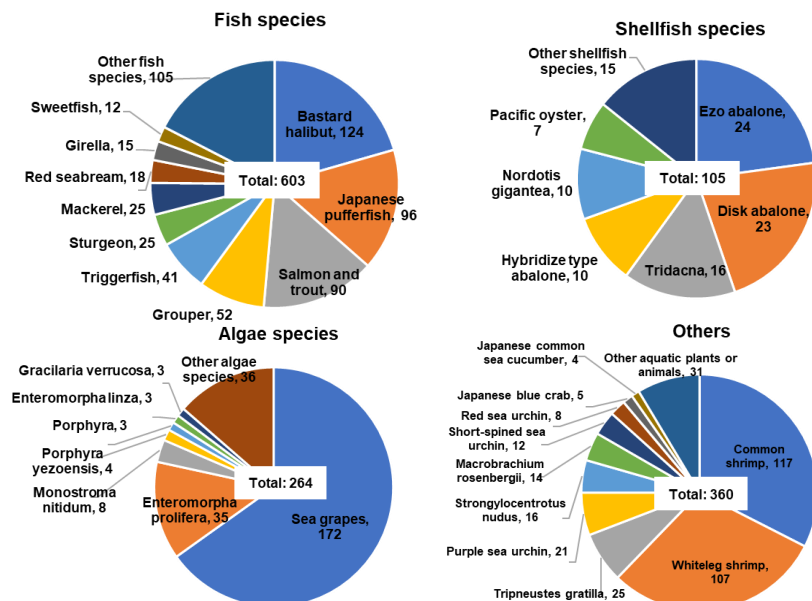
At the meeting (Source: Website of the Ministry of Foreign Affairs)

Section 3 Future Potential of the Aquaculture Industry — Land-based Aquaculture —

Current Status of Land-based Aquaculture and Vision Based on New Technologies

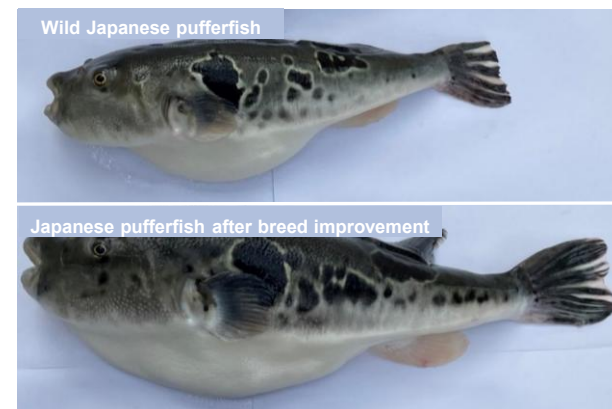
- Against the backdrop of decreasing fisheries and aquaculture production volumes due to climate change, various types of business operators have started land-based aquaculture. It is expected that the combination of conventional fisheries and aquaculture and land-based aquaculture will decrease import dependence through stable production and contribute to Japan's food security.
- In Japan, from the perspective of ensuring a sustainable food supply and regional developments, diverse business entities, including startups and major companies with large-scale closed recirculating facilities, are engaging in land-based aquaculture, and businesses toward demonstration and commercialization are being operated, such as the development of species utilizing water treatment and purification technologies and genomic technologies.
- Japan will strategically foster land-based aquaculture, and promote the acquisition of domestic and international markets, accumulation of technologies and know-how, and business expansion in and outside Japan, thereby endeavoring to take in wealth from outside and ensure food security.

Number of Reported Cases of Land-based Aquaculture by Species
(Total Number)



[Case Example] Development of New Breeds Using Cutting-edge Genomic Technology

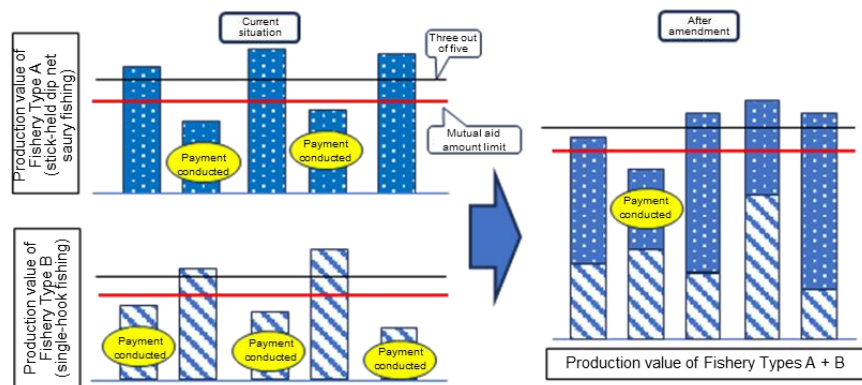
- ✓ Regional Fish Institute, Ltd. is a startup company working on breed improvement of fishery products by using cutting-edge genomic technology.
- ✓ The company succeeded in the development of red seabream with high feed efficiency, fast-growing globefish with high feed efficiency, fast-growing, high-temperature-tolerant flatfish, etc.



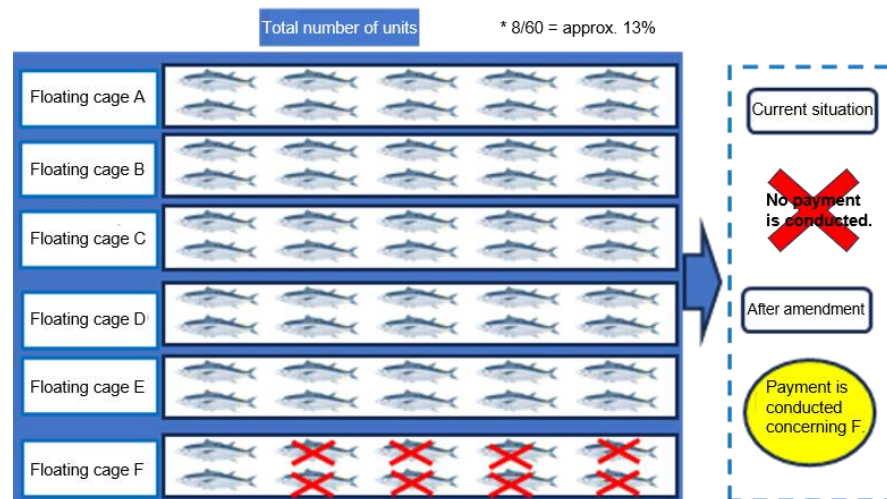
Japanese pufferfish after breed improvement (Provided by Regional Fish Institute, Ltd.)

- Fishery Mutual Aid, which is affectionately called “Gyosai,” is operated based on the Act on Compensation for Disasters in the Fishing Industry. About 10 years passed from the previous amendment of the Act, and the system was no longer suited to the actual circumstances. Therefore, the draft Act Partially Amending the Act on Compensation for Disasters in the Fishing Industry was submitted to the Diet in February 2025 and was enacted in April 2025. The amended Act took effect in April 2026.
- The amended Act created a method to enable the conclusion of a contract collectively for multiple types of fisheries with the aim of supporting complex fisheries in response to resource fluctuations caused by changes in the marine environment. Discounts of installment deposits were also introduced.
- The production volume per management body engaging in fish aquaculture expanded more than four-fold over 40 years thanks to the expansion of floating cage sizes and the succession of fishing grounds. The amended Act added a covenant to pay mutual aid money even in cases of significant damage to 80% or more of each floating cage, irrespective of the loss percentages of cultured fish as a whole.
- Due to changes in the marine environment and frequent disasters, the necessity and importance of Fishery Mutual Aid are increasing. Fishers are encouraged to subscribe to the mutual aid system to stabilize their operations.

Creation of a Contract Method of Concluding Collectively for Multiple Types of Fisheries



Addition of a Covenant to Pay Mutual Aid Money in Accordance with the Damage to Each Floating Cage



- From the Meiji Era to the early Showa Era (late 19th to early 20th century), the introduction and spread of power vessels, machine-made nets, freezing technology, and diesel engines modernized the fisheries industry, and fishing grounds expanded from coastal areas to the open sea.
- The war devastated Japan's fisheries, and food shortages became increasingly serious. Following the entry into force of the San Francisco Peace Treaty after the war, fishing operations were conducted worldwide under the international agreement, and distant water fisheries reached their peak in 1973. However, thereafter, fishing within two hundred nautical miles has spread internationally.

–Resumption of whaling after a temporary suspension amid turmoil in the Showa era (1926–1989)–

- Whale meat accounted for approx. 50% of animal protein consumed during the serious food shortages after the war. The whaling industry supported Japanese people's diet during the subsequent period of rapid economic growth.
- Due to the decision of the International Whaling Commission (IWC) on a moratorium on commercial whaling in 1982, commercial whaling was suspended from 1988. Japan withdrew from the International Convention for the Regulation of Whaling at the end of June 2019, and resumed commercial whaling of large types of whale, whose resources are abundant, within its territorial waters and EEZ in July 2019. The Fisheries Agency continues offering support to convey the advantages of whale meat and promote their sustainable use.

Whaling Vessels Operating within Japan's Territorial Waters and EEZ



Whaling vessel: *Yuushin-maru*



Whale mother ship: *Kangei-maru*

Regional Traditional Whale Cuisine



Deep fried whale meat flavored with soy sauce and ginger
(Kushiro City, Hokkaido)



Whale sashimi (Shimonoseki
City, Yamaguchi)

- Efforts are being made internationally to eliminate illegal, unreported, and unregulated (IUU) fishing. Regional fisheries management organizations (RFMOs) have made positive lists of authorized fishing vessels and negative lists of vessels involved in IUU fishing. In this manner, international frameworks have been developed to crack down on IUU fishing vessels. Furthermore, some RFMOs have introduced catch documentation schemes to prevent the distribution of fish and fishery products derived from IUU fishing.
- Many foreign fishing vessels operate in the waters surrounding Japan. The Fisheries Agency has strengthened fisheries enforcement activities within Japan's EEZ. Furthermore, in the high seas of the North Pacific, the Fisheries Agency has conducted boarding inspections on fishing vessels to check their compliance with the Conservation Management Measures (CMMs) adopted by the North Pacific Fisheries Commission (NPFC) and the Western and Central Pacific Fisheries Commission (WCPFC). Any vessels found to be in violation are reported to flag states and relevant organizations.
- In order to prevent the inflow of IUU fishing-derived products, Japan conducts import controls for tuna, etc. through such means as prior confirmation under the Foreign Exchange and Foreign Trade Act. Furthermore, under the Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants, upon the import of mackerel, Pacific saury, Japanese sardine, and squid, Japan requires the attachment of catch certificates issued by the relevant country's government or other equivalents.

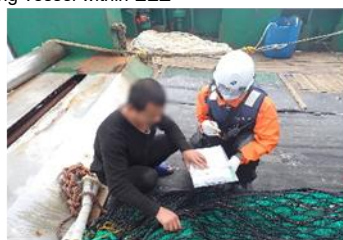
Responses to Illegal Fishing Activities by Foreign Fishing Vessels



Authorized fisheries inspectors conducting boarding inspections against a foreign fishing vessel within EEZ

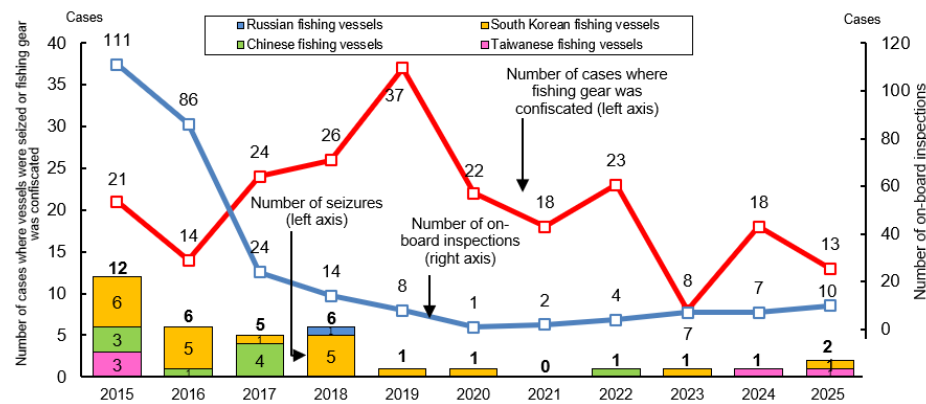


Seizure in the waters surrounding Okinawa



Authorized fisheries inspectors conducting boarding inspections against a foreign fishing vessel in the high seas

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



Source: Survey by the Fisheries Agency

Note: On-board inspections on the high seas are not included.

- Approx. 70% of new fishery workers are from other industries. Securing and fostering fishery workers is important also from the perspective of regional revitalization. The Fisheries Agency holds fisheries employment counseling sessions, accepts interns, provides financial support to students at fishery schools and OJT training, or otherwise offers support to new fishery workers in accordance with their levels and stages.
- Amid the decreasing number and aging of fishery workers, it is important to attract the attention of young people to encourage them to become fishery workers. The Fisheries Agency and relevant industries hold Fishery Guidance, etc. targeting students from fisheries high schools at various locations, thereby contributing to strengthening collaboration with local fishers and fostering future generations.
- In 2024, the relevant Act was partially amended and the Technical Intern Training Program was replaced by the newly established Employment for Skill Development Program. In January 2026, a Cabinet decision was made on the operation policy by sector regarding employment for specified skill development for the fisheries and food manufacturing industries (including the fishery processing industry), etc. The business category of fishery processing was separated within the food manufacturing sector, and it is expected that the expertise of foreign workers accepted in the fishery processing industry will be enhanced and their contribution to the fisheries industry will increase.

Fishery Guidance in FY2025

- ✓ Held Fishery Guidance targeting students from fisheries high schools at various locations
- ✓ Held an event titled "Fishers' Work! A Class to Learn about Vessels and Fisheries" in Yaizu City, Shizuoka, in June and in Hachinohe City, Aomori, in July 2025



Participants of Fishery Guidance
(Yaizu City)



Visit to a vessel for stick-held dip net saury
fishing (Hachinohe City)

(Provided by the National Fishery Worker Securement and Development Center)

[Case Example] Engaging in Both Stick-held Dip Net Saury Fishing and Pelagic Longline Tuna Fishing

- ✓ Fishing vessels are operated all year round by conducting pelagic longline tuna fishing during seasons other than the season of stick-held dip net saury fishing (from August to December).
- ✓ By operating fishing vessels all year round, crew members' long-term stable employment is secured.



Pelagic longline tuna fishing



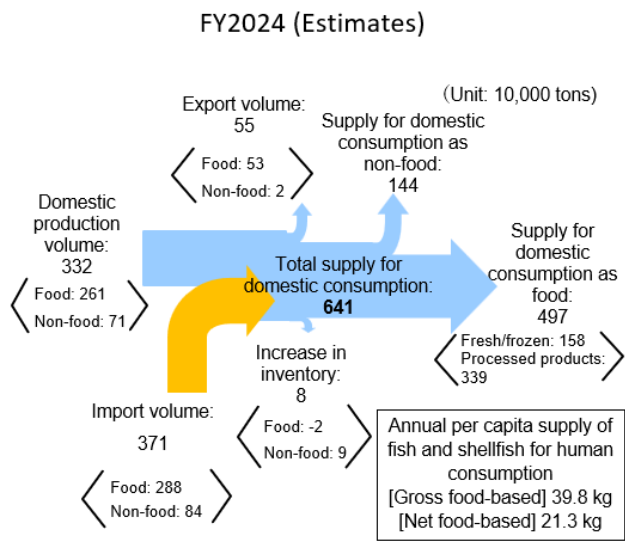
Stick-held dip net saury fishing

(Provided by Ikeda Suisan Co. Ltd.)

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

- The total supply for domestic consumption of fish and shellfish was estimated at 6.41 million tons for FY2024 (converted on a round-fish basis, estimate), of which 4.97 million tons (78%) were for human consumption (food) and 1.44 million tons (22%) as non-food (feed and fertilizer).
- The self-sufficiency rate of fish and shellfish in FY2024 was 52% (estimate).

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



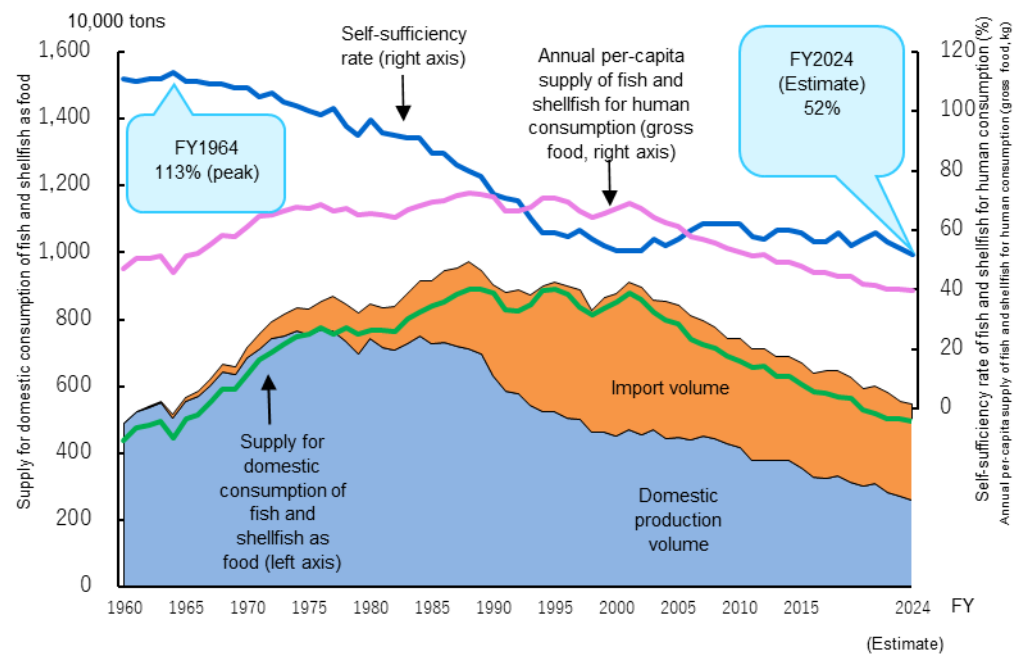
Source: Food Balance Sheet (Ministry of Agriculture, Forestry and Fisheries)

Notes: 1) The figures are after conversion on a round-fish basis (except for net food-based supplies) and do not include marine algae, the whaling industry's catch, and by-products from scientific research on whales.

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).

Trends in Self-Sufficiency Rate of Fish and Shellfish



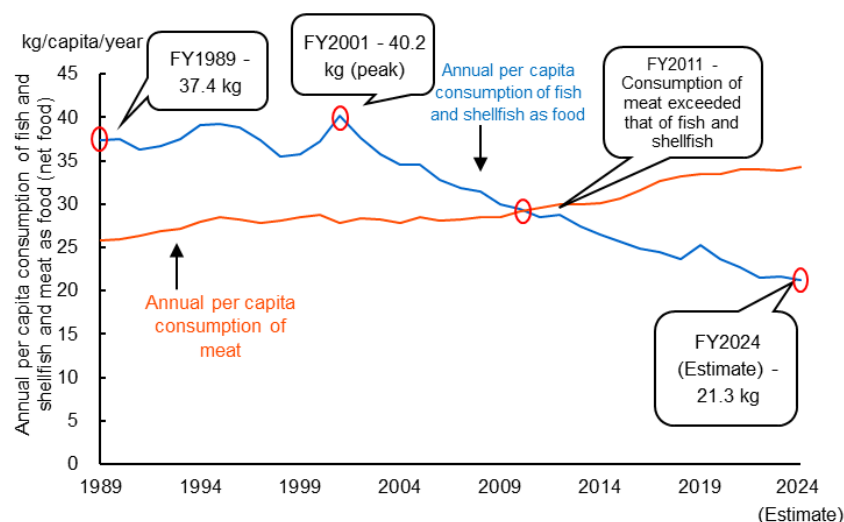
Source: Food Balance Sheet (Ministry of Agriculture, Forestry and Fisheries)

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-based) 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 FY2024 was 21.3 kg (estimate).
- 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. On the concept of “Fish × Sustainability,” a broad range of supporters, including retailers, restaurants, and processors, implement various initiatives nationwide, such as holding fairs, providing special dishes for a limited time, and communicating health information. Joint initiatives are also expanding.
- Increasing opportunities for children to become familiar with fishery products through school lunches or extracurricular classes is important for handing down the culture of eating seafood. Education on the culture of eating seafood, such as lectures on demand by fishers, is attracting rising attention.

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



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

Ambassador, Supporters, and Support Team for “Fish Day”



Sakana-kun, the “Fish Day” Ambassador, and Sazae-san family as “Fish Day” supporters

The reorganized “Fish Day” support team

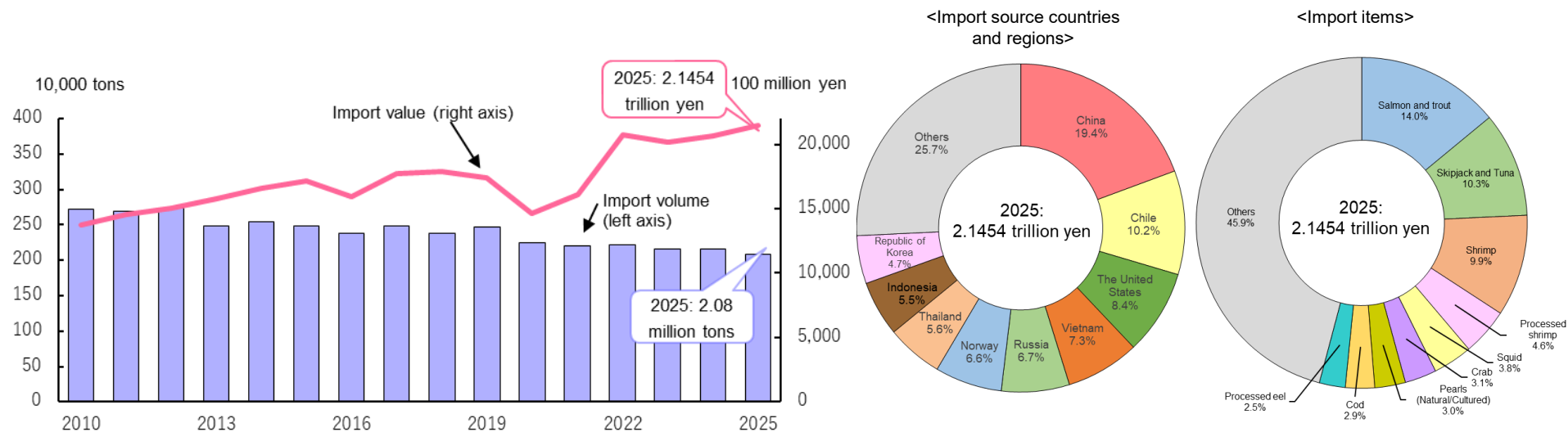


(3) Trends in the Trade of Fish and Fishery Products

i. Trends in Import of Fish and Fishery Products

- The import volume of fish and fishery products (on a weight basis) in 2025 decreased by 3.4% from the previous year to 2.08 million tons. The import value increased by 3.8% from the previous year to 2.1454 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, skipjack and tuna, and shrimp.

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



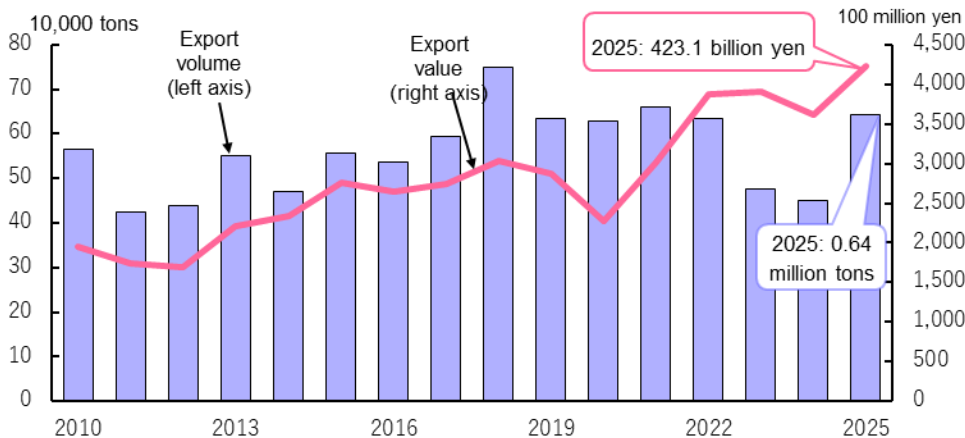
Source: Prepared by the Fisheries Agency based on the Foreign Trade Statistics (Ministry of Finance)

Source: Prepared by the Fisheries Agency based on the Foreign Trade Statistics (Ministry of Finance, 2025)

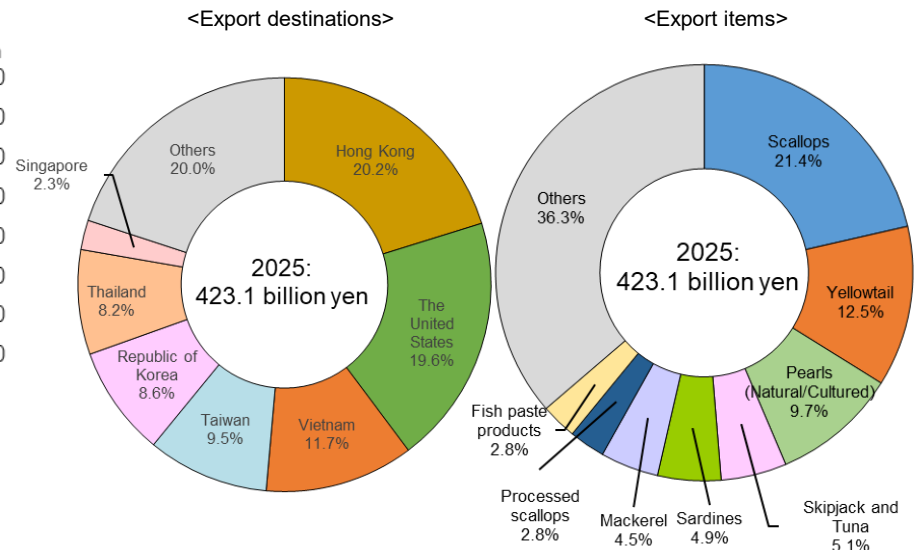
ii. Trends in Export of Fish and Fishery Products

- The export volume of fish and fishery products (on a weight basis) increased by 42.9% from the previous year to 0.64 million tons in 2025. The export value increased by 17.2% from the previous year, hitting a record high of 423.1 billion yen.
- Major export destinations are Hong Kong, the United States, and Vietnam. In terms of export value, major export items are scallops, yellowtail, and pearls.
- The export value target set for each priority export item was achieved for three items, namely, scallops, pearls, and Nishikigoi.
- The Export Expansion Strategy for Agricultural, Forestry, Fishery Products and Food was comprehensively revised in May 2025. In the fisheries sector, oyster and oyster products and scallop products were newly added to the list of priority export items. As a result, six items, namely, yellowtail, sea bream, scallops and scallop products, oyster and oyster products, pearls, and Nishikigoi are designated as priority export items.

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)

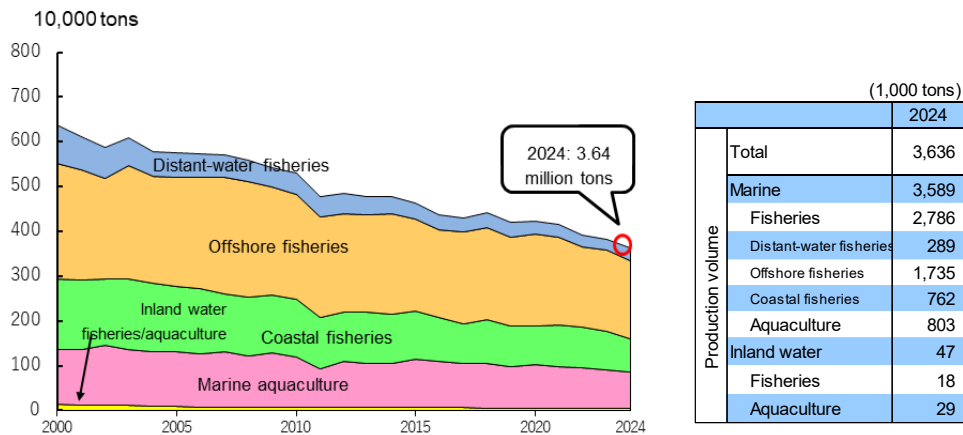


Source: Prepared by the Fisheries Agency based on the Foreign Trade Statistics (Ministry of Finance, 2025)

(1) Trends in Domestic Fisheries and Aquaculture Production

- The volume of domestic fisheries and aquaculture production decreased by approx. 190,000 tons from the previous year to approx. 3.64 million tons in 2024, of which that of marine fisheries decreased by approx. 140,000 tons from the previous year to approx. 2.79 million tons. In particular, the volume of Japanese sardines, round herrings, etc. decreased. The volume of marine aquaculture decreased by approx. 50,000 tons to approx. 0.80 million tons. The volume of inland water fisheries and aquaculture decreased by approx. 5,000 tons to approx. 50,000 tons.
- The production value of domestic fisheries and aquaculture decreased by approx. 54.1 billion yen from the previous year to approx. 1.6297 trillion yen in 2024, of which that of marine fisheries decreased by approx. 60.4 billion yen to 891.5 billion yen, that of marine aquaculture increased by approx. 12.1 billion yen to approx. 607.7 billion yen, and that of inland water fisheries and aquaculture decreased by approx. 5.8 billion yen to approx. 130.5 billion yen.

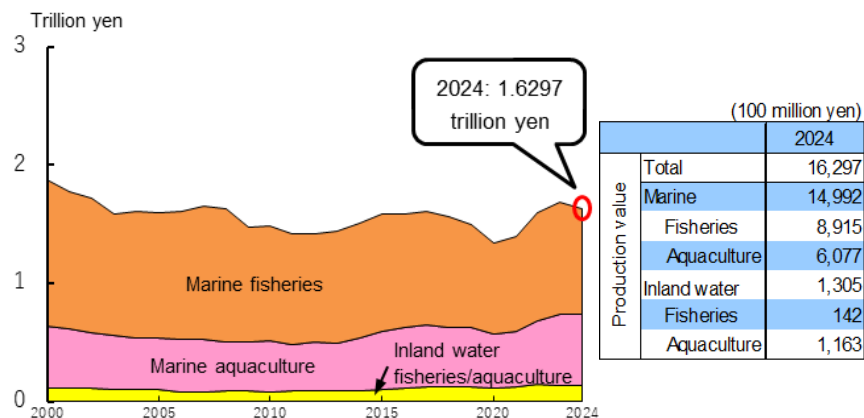
Trends in the Production Volume of Fisheries and Aquaculture



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, the classification was based on tonnage, etc. of powered fishing vessels until 2006. However, surveys of catch by vessel tonnage group were discontinued in 2007, and as a result, figures from 2007 to 2010 are estimates. Since 2011, 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



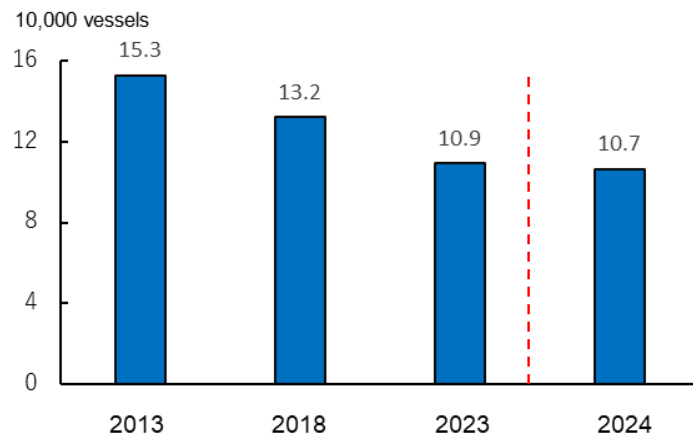
Source: Prepared by the Fisheries Agency based on the Fisheries Output (Ministry of Agriculture, Forestry and Fisheries)

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

(2) Trends in Management of Fisheries

- The number of fishing vessels is decreasing and vessels are becoming old.
- Fishing vessels are essential production facilities. Accordingly, the Fisheries Agency promotes the fishing vessel leasing business and profitable fishery projects, thereby supporting fishers' initiatives to enhance profitability through introducing high-performance fishing vessels, etc.
- Prices of heavy oil (Class A), which fishers mainly use, have been at high levels due to various factors, including high property prices in Japan and exchange fluctuations.
- The Fisheries Agency has been implementing the Fishery Management Safety Net Construction Project, etc. as countermeasures against sharply increasing fuel oil prices.

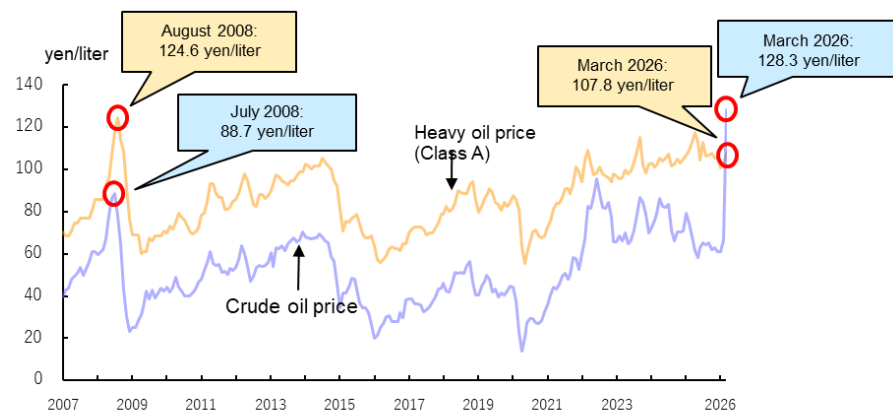
Trends in the Number of Fishing Vessels



Source: Census of Fisheries (Ministry of Agriculture, Forestry and Fisheries, 2013, 2018, and 2023) and Survey on Movement of Fishery Structure (2024)

Note: "Fishing vessels" here refers to those owned as of the survey date (November 1 of each year) and used for fishery production by management bodies during the last one year, including auxiliary vessels (such as light vessels, search vessels, and purse seine vessels for purse seine fishery), in addition to the main vessels.

Trends in Fuel Oil Prices

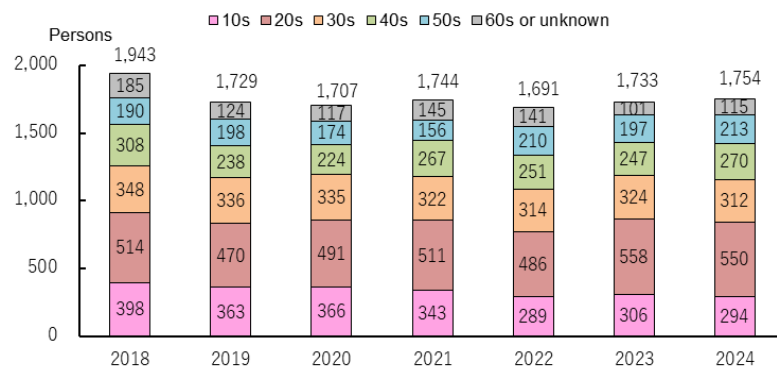


Source: Survey by the Fisheries Agency

(3) Fishery Workers, Fishery Working Environments, and Utilization of Technologies for Promoting Smart Fisheries

- The number of fishery workers has been consistently declining, and the number of new fishery workers has been around 1,700.
- For distant-water fisheries that require long sailing periods, the aging of crew members and labor shortage have become serious due to a lack of opportunities to secure marine officers and decreases in young fishery workers. Therefore, related bodies and the government offer support for initiatives for securing personnel, for training and acquisition of licenses, etc.
- Among fishing vessel accidents, the number of dead and missing reported is the largest for overboard incidents. Life jackets are crucial for survival in overboard incidents (the survival rate is approximately 1.6 times higher with a life jacket than without one).
- The introduction and dissemination of information technologies, such as ICT, IoT, and AI, and advanced technologies, such as drones, in fisheries and aquaculture are important for the growth of the fisheries industry as a whole.

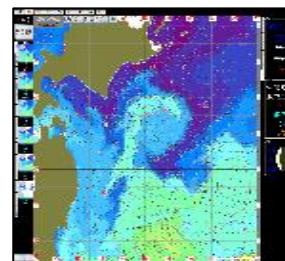
Trends in the Number of New Fishery Workers



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

Future Vision Aimed at by Smart Fisheries

- ✓ Conduct stock assessments for around 200 species of fisheries resources
- ✓ Automatize goods handling and processing facilities with AI, robots, etc.
- ✓ Enhance fisheries efficiency by utilizing the fishing ground and sea condition prediction system based on AI technologies, etc.



Fishing ground prediction system

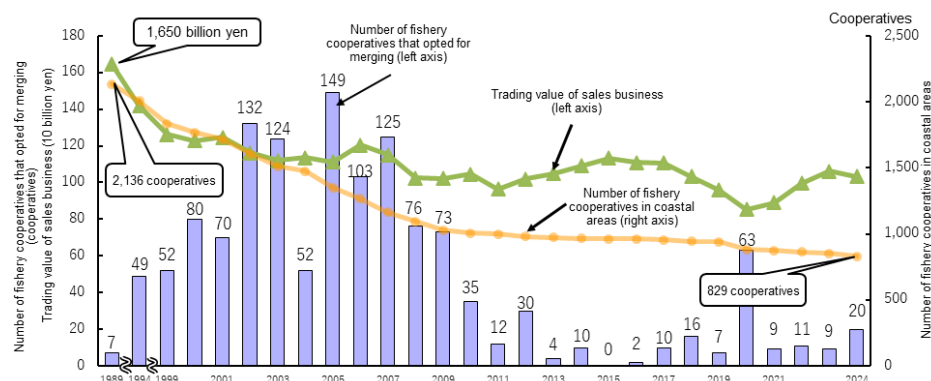


Automatic sorting using image sensing technology

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

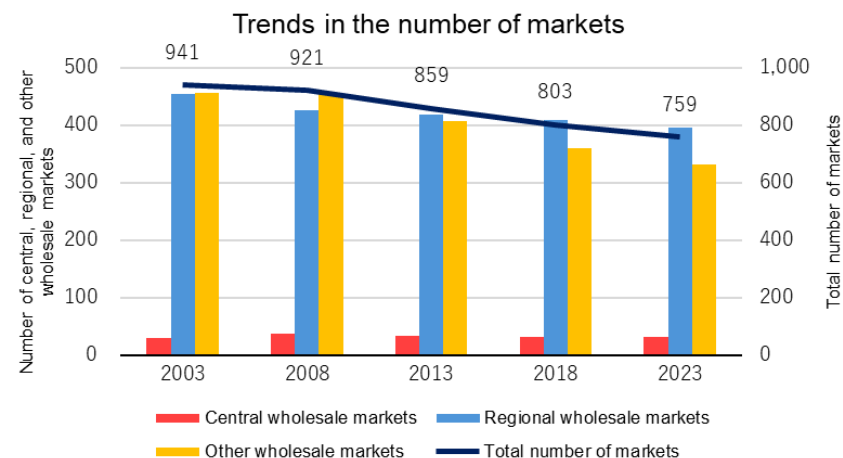
- A fishery cooperative contributes to the stabilization and development of fishery business management by conducting sales business and related operations. It is an organization that plays a core role in supporting the local economy and social activities of a fishing community, primarily through the appropriate use and management of fisheries resources. The number of fishery cooperatives (in coastal areas) was 829, as of the end of March 2025. There is a need to strengthen fishery cooperatives' management foundation, through mergers, etc.
- There are wholesale markets in landing areas, which handle landed fish catches, and wholesale markets in consuming areas, which collect various fishery products, sort them by use, and sell sorted products to purchasers. Many of the wholesale markets in landing areas are small and face challenges, such as weak pricing power and high fixed expenditures. The market functions of wholesale markets in landing areas need to be strengthened and maintained through market consolidation and other measures.
- Seafood-processing factories are located in coastal areas and contribute to the vitalization of fishing communities with fisheries. On the other hand, the fishery processing industry faces challenges, such as limited management capacity, labor shortages, and difficulties in sourcing raw materials. In order to address these issues, the Fisheries Agency has been supporting initiatives to establish value chains connecting from production to sale, and to strengthen collaboration between fishery cooperatives and fishery processing cooperatives, etc.

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

Trends in the Number of Markets in Wholesale Markets in Producing Areas



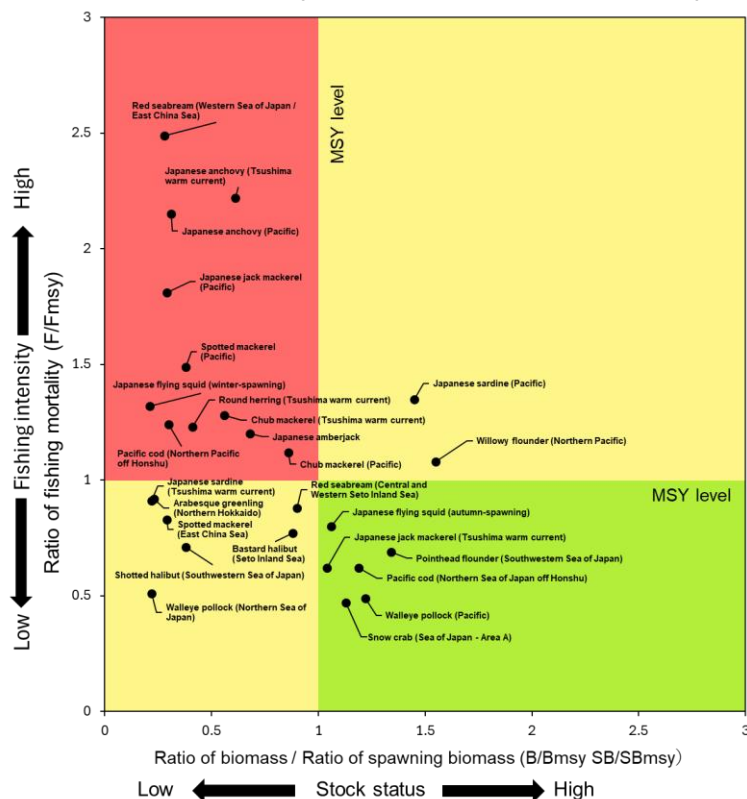
Source: Prepared by the Fisheries Agency based on the Census of Fisheries and Wholesale Market Data (Ministry of Agriculture, Forestry and Fisheries)

(1) Japan's Stock Assessment

- The number of species subject to stock assessment was expanded from 50 in FY2018 to 192 in FY2021.
- By FY2025, the biomass level and the fishing mortality rate that generates the maximum sustainable yield (MSY) had been estimated for 40 stocks of 22 species subject to stock assessment.

Stock Assessment Based on MSY

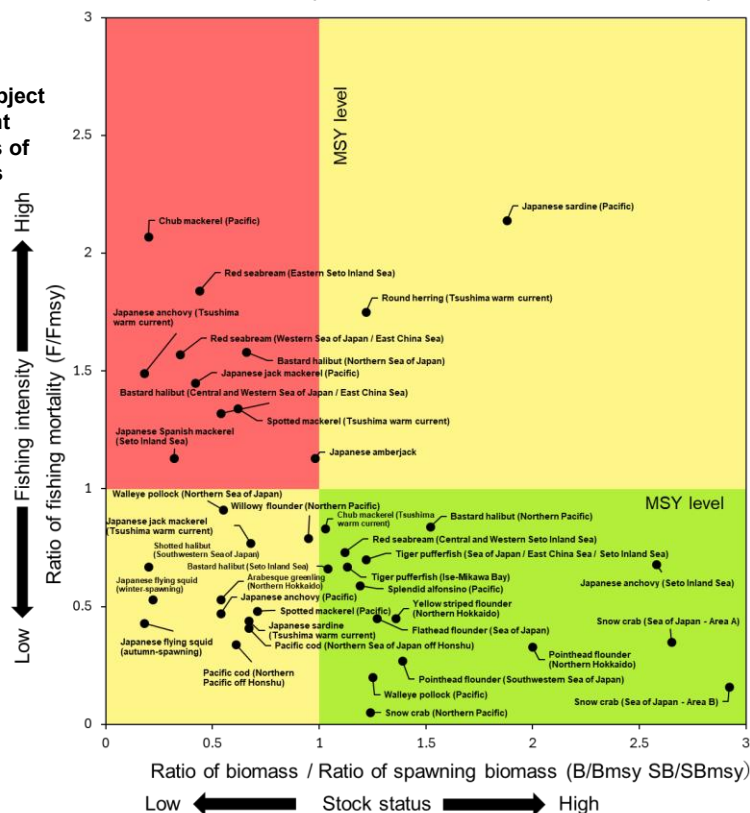
FY2021 (26 stocks of 17 species)



Increase of species subject to stock assessment
Changes in the status of fisheries resources



FY2025 (40 stocks of 22 species)



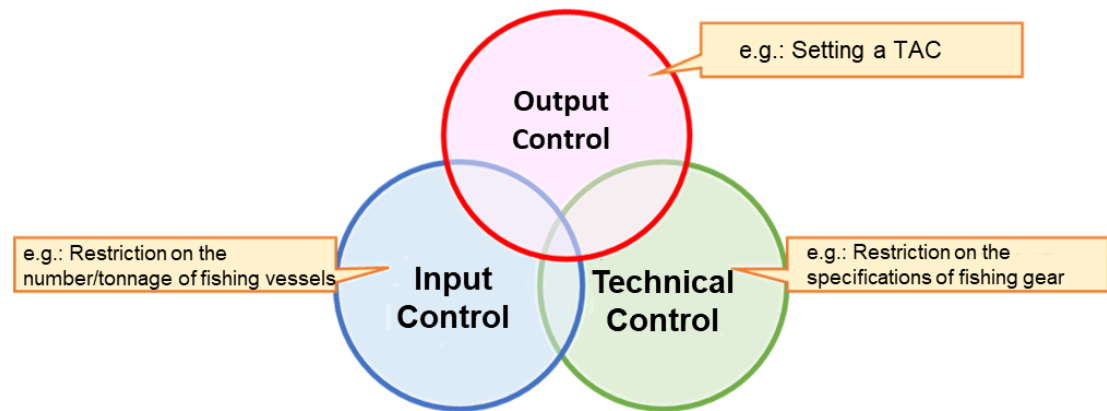
Source: Prepared by the Fisheries Agency based on the Stock Assessment of Fisheries Resources in the Waters Around Japan (Fisheries Agency and Japan Fisheries Research and Education Agency)
The names of stocks here are those used at the time of stock assessment.

(2) Japan's Fisheries Resource Management [1]

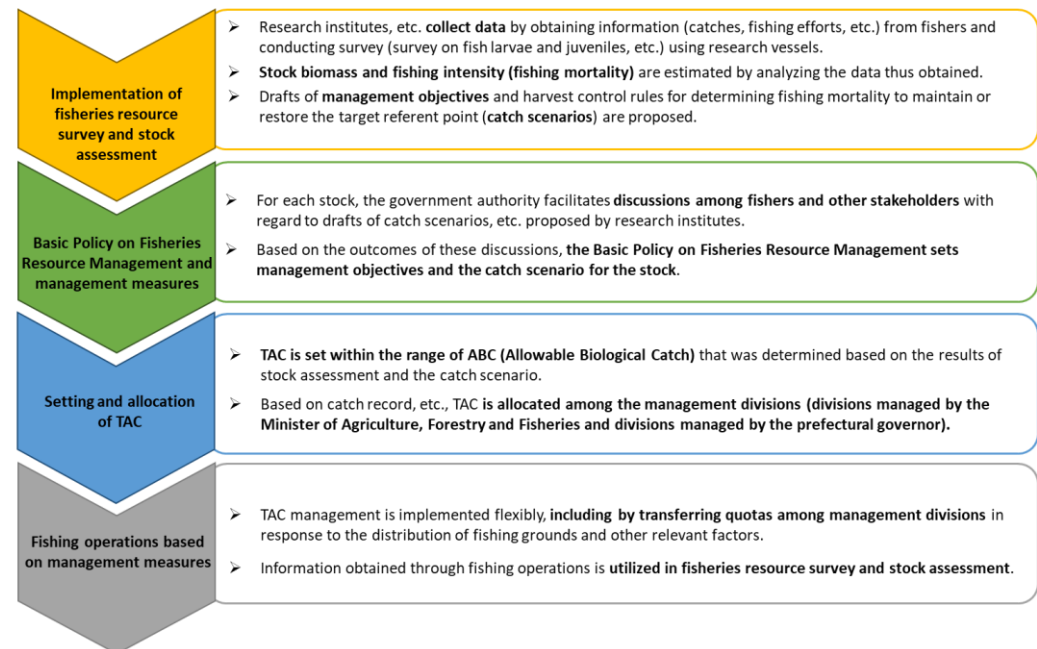
- Fisheries resource management refers to efforts to ensure the sustainable use of fisheries resources by regulating fisheries activities to maintain them at the target level. Fisheries resource management measures are categorized into three types: 1) input control, 2) technical control, and 3) output control (TAC management).

- Under the Fishery Act, the target of fisheries resource management is defined in principle as the biomass level that should be maintained or restored in order to produce the MSY (Maximum Sustainable Yield). TAC (Total Allowable Catch) management is the principal management approach for achieving this target.

Correlation Between Resource Management Measures



Flow of TAC Management



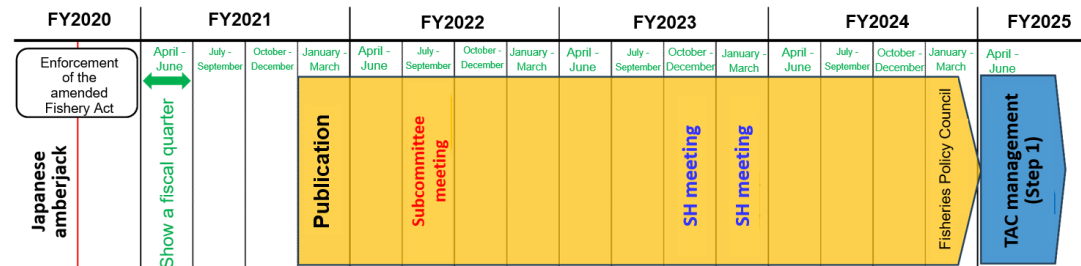
(2) Japan's Fisheries Resource Management [2]

- Based on the Fishery Act, the Basic Policy on Fisheries Resources Management was formulated in October 2020.
- The policy set out the basic principles of fisheries resource management, management objectives by stock, TAC-managed stocks, management division setting, allocation standards necessary for TAC management, etc.
- The expansion of TAC-managed stocks has been pursued in accordance with the new Roadmap, with priorities determined based on the status of stock assessments and the importance of the stock to regional economies, etc. As of April 2026, TAC management had been expanded to cover 77% of total catch by volume.
- In the expansion of TAC-managed stocks, the relevant subcommittee of the Fisheries Policy Council conducts deliberations for the candidate stock based on its stock assessment results and opinions from stakeholders in the field. Based on the deliberation results, the Fisheries Agency publishes and explains proposed management objectives and catch scenarios, and TAC management is subsequently introduced following stakeholder meetings and other consultation processes. Since 2020, 12 stocks of 6 species have been newly added to TAC-managed stocks. During the initial stages of implementation, a step-up management approach has been adopted, allowing flexible and phased implementation.

Process for Expanding TAC-managed Stocks

- The basic process is: "Publication" ⇒ "Subcommittee meeting" ⇒ "Stakeholder (SH) meeting" ⇒ "Fisheries Policy Council."
- (i) **Publication**: Indicates the timing of publication of stock assessment results (Since FY2022, briefing sessions on the results have also been held.)
- (ii) **Subcommittee meeting**: Indicates the timing when meetings of the Subcommittee for Reviewing Fisheries Resource Management Measures. At this stage, key issues in introducing TAC management and members' opinions are organized and summarized.
- (iii) **SH meeting**: Indicates when stakeholder meetings on management policy for the candidate stock are held. At this stage, discussions cover MSY-based stock management objectives and catch scenarios for achieving the target reference point in the same manner as for existing TAC-managed stocks, as well as issues and possible solutions in introduction of TAC management for the candidate.
- (iv) **Fisheries Policy Council**: Indicates when a Resource Management Subcommittee of the Fisheries Policy Council is held. At this stage, the draft amendment of the Basic Policy for Fisheries Resource Management, incorporating the new TAC-managed stocks, is submitted to the subcommittee for deliberation and a recommendation is issued.

◎ Example of Japanese amberjack



Progress in the Expansion of TAC-managed Stocks

Time to commence TAC management	Fisheries Resources
From January 2024	Japanese anchovy (Tsushima warm current)
	Round herring (Tsushima warm current)
From July 2024	Pacific cod (Northern Pacific off Honshu)
	Pacific cod (Northern Sea of Japan off Honshu)
	Pacific cod (Northern Pacific off Hokkaido)
	Pacific cod (Northern Sea of Japan off Hokkaido)
From January 2025	Japanese anchovy (Pacific)
	Japanese anchovy (Seto Inland Sea)
	Red seabream (Western Sea of Japan / East China Sea)
From April 2025	Japanese amberjack
From September 2025	Red snow crab (Sea of Japan) (water areas for fishery permitted by the governor)
	Red snow crab (Sea of Japan) (water areas for fishery permitted by the minister)

(2) Japan's Fisheries Resource Management [3]

- For shellfish and algae harvesting, which targets highly stationary resources in coastal areas, as well as set-net fishing, aquaculture, and inland water fisheries, a prefectural governor grants fishery rights to fishery cooperatives, etc.
- Offshore and distant fisheries, whose fishing grounds are broader sea areas, have a significant impact on resources and require adjustments with other types of fisheries. Accordingly, they are under fishing permit systems by the national government or a prefectural government.
- Japan promotes fisheries resource management through a combination of government regulations and voluntary efforts by fishers. In particular, for stocks not subject to TAC management, greater emphasis is placed on voluntary fisheries resource management by fishers.
- With regard to recreational fishing of bluefin tuna, it is necessary to make a shift to a system to have recreational fishers also participate in the resource management framework in the same manner as professional fishers, in lieu of the conventional method of asking for their cooperation with professional fishers' efforts. Accordingly, based on the instruction of the Wide Sea-area Fisheries Adjustment Commission, staged management, such as the prohibition of catching small fish, imposition of the obligation to make a report upon catching large fish, prohibition of catching large fish, was introduced.
- In April 2026, a notification system was commenced in order to ascertain the whole picture of recreational fishing of bluefin tuna.

Conceptual Diagram of Fishery Rights System and Fishing Permit System

Fishery based on a fishery right

A prefectural governor grants a fishery cooperative or individual/corporation the right to exclusively operate specific coastal fisheries/aquaculture.

Governor-licensed fishery

A prefectural governor licenses the engagement of fishery operations off the coast of the prefecture.

Minister-licensed fishery

The national government (the Minister of Agriculture, Forestry and Fisheries) licenses the engagement of fishery operation off the coasts of several prefectures or overseas.

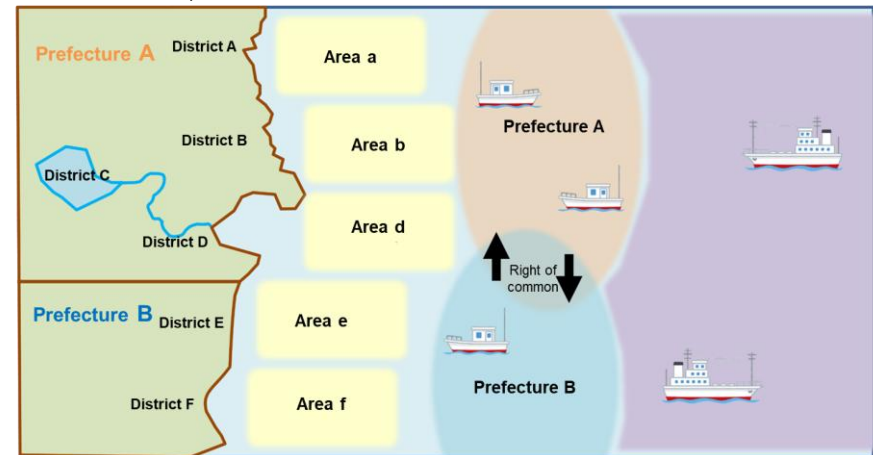


Illustration of spatial and overlapped use of waters by fishery based on a fishery right.

Fishing operations in June (illustration)



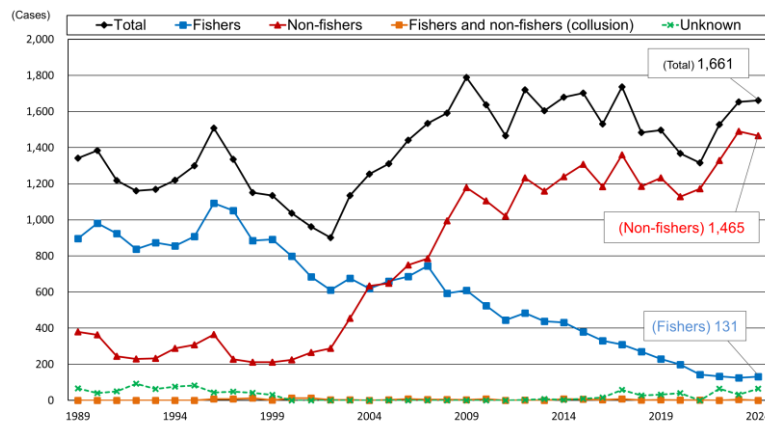
Fishing operations in December (illustration)



(3) Initiatives for Effective Fisheries Resource Management

- The nationwide number of arrests for poaching was 1,702 in 2024 (of which 1,661 were in coastal waters (including 65 cases where suspects are unknown, etc.) and 41 in inland waters). The number of poaching cases by non-fishers has significantly exceeded the number by fishers and poaching has become further aggressive and cunning.
- The Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants obliges the communication of information, such as catch numbers, and the preparation and preservation of transaction records. Abalone, sea cucumber, and juvenile eels whose total length is 13 cm or less, which are highly likely to be illegally caught or gathered in Japan, were designated as Class I Specified Aquatic Animals and Plants, and the entry of illegally caught or gathered aquatic animals and plants in the distribution channels is prevented by tracking records or other means.
- Since the enforcement of the Act Partially Amending the Fishery Act and the Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants in April 2026, with regard to large Pacific bluefin tuna (30 kg or more), whose economic value is high and which require strict management, the distribution of those violating the TAC reporting obligation has been prevented.

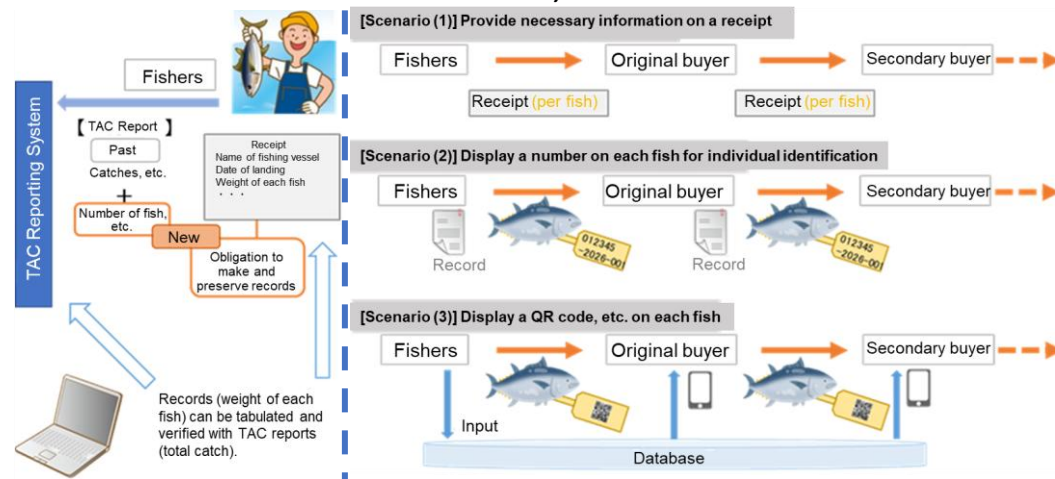
Trends in the Number of Arrests for Violation of Fisheries-Related Laws and Regulations in Japan's Marine Regions



Source: Survey by the Fisheries Agency

Overview of the System after Partial Amendment of the Fishery Act and the Act on Ensuring the Proper Domestic Distribution and Importation of Specified Aquatic Animals and Plants (Large Pacific Bluefin Tuna)

Obligation to manage individual fish upon TAC reporting and to transmit information at the time of transactions, etc.

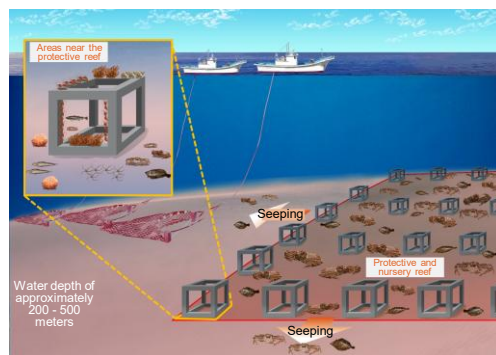


(4) Initiatives for Fisheries Resources Enhancement and Trends in the Fishing Ground Environment

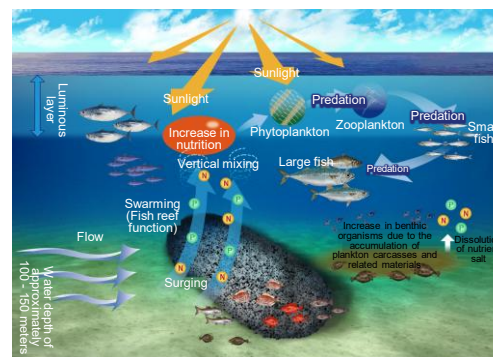
- The release of juvenile fish is carried out as part of fisheries resource management, primarily by prefectural aquaculture centers, targeting approximately 70 species nationwide, including flounder, red seabream, sea urchins, and abalones, while considering regional conditions and marine characteristics.
- In order to increase fisheries resources in offshore areas, the Fisheries Agency has been developing protective and nursery reefs and mound reefs.
- In enclosed water areas, a decline in nutrient salts, among other factors, is believed to potentially contribute to such issues as the discoloration of cultured nori seaweed and a decrease in fish and shellfish populations, including Japanese sand lance. In the Seto Inland Sea, a nutrient salt management plan was formulated based on the Act on Special Measures Concerning Conservation of the Environment of the Seto Inland Sea, and water quality improvement and sustainable use of fisheries resources are both being promoted. In the Ariake Sea and Yatsushiro Sea, etc., related prefectures are taking measures for conservation and improvement of the environment and for recovery of resources based on the Act on Special Measures Concerning Rejuvenation of Ariake Sea and Yatsushiro Sea.
- 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, 3) supporting the promotion of fishing net recycling, and 4) encouraging fishers to retrieve marine litter in collaboration with the Ministry of the Environment, prefectural governments, and other relevant entities.

Illustration of Protective and Nursery Reefs and Mound Reefs

(i) Mechanism of protective and nursery reef (illustration)



(ii) Mechanism of a mound reef (illustration)



Recycling of Fishing Gear and Fishing Nets

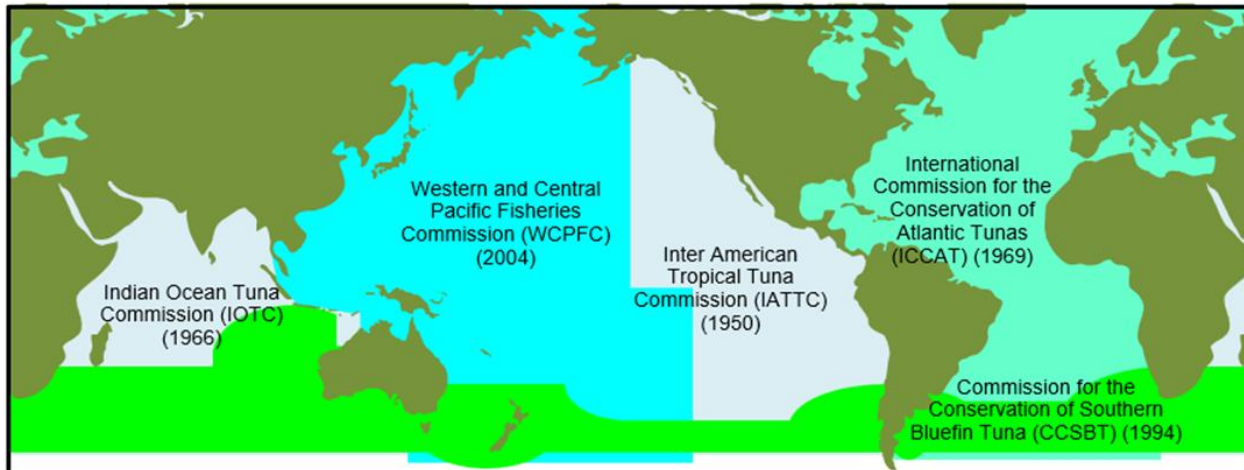


(1) International Fisheries Resource Management [1]

Promotion of international fisheries resource management and regional fisheries management organizations

- Japan has been promoting appropriate management of fisheries resources in its exclusive economic zone (EEZ). Fisheries resources targeted by Japanese fishing vessels, such as Pacific saury and chub mackerel, are also targeted by foreign fishing vessels. It is important for Japan to actively contribute to international fisheries resource management so that the effects of its efforts for fisheries resource management within Japanese EEZ are not undermined.
- The United Nations Convention on the Law of the Sea provides that a coastal state and other states that catch highly migratory species should offer cooperation for the purpose of conserving and using the relevant species through regional fisheries management organizations, irrespective of inside or outside of the EEZ.
- Tunas around the world are managed by the five regional fisheries management organizations (RFMOs).
- Four of the organizations, namely, WCPFC, IATTC, ICCAT, and IOTC, manage tunas in sea areas under their respective jurisdictions. Southern bluefin tuna, which is found broadly in the southern hemisphere, is solely managed by CCSBT.

Regional Fisheries Management Organizations Managing Tunas and Waters Covered



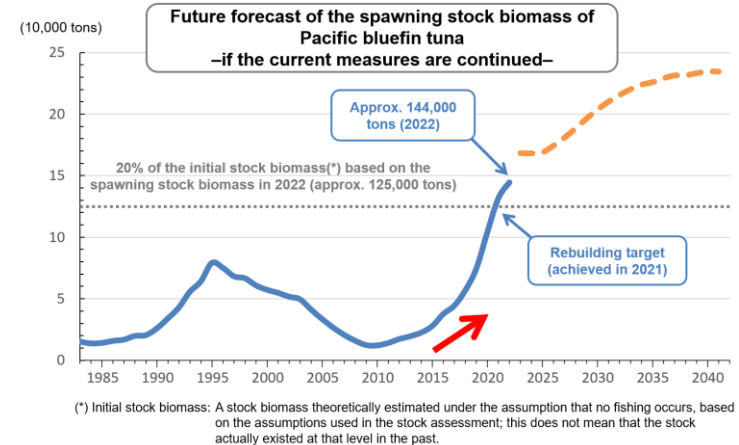
Note: The years in parentheses are the years in which the relevant treaties took effect.

(1) International Fisheries Resource Management [2]

i. Trends in Regional Fisheries Management Organizations

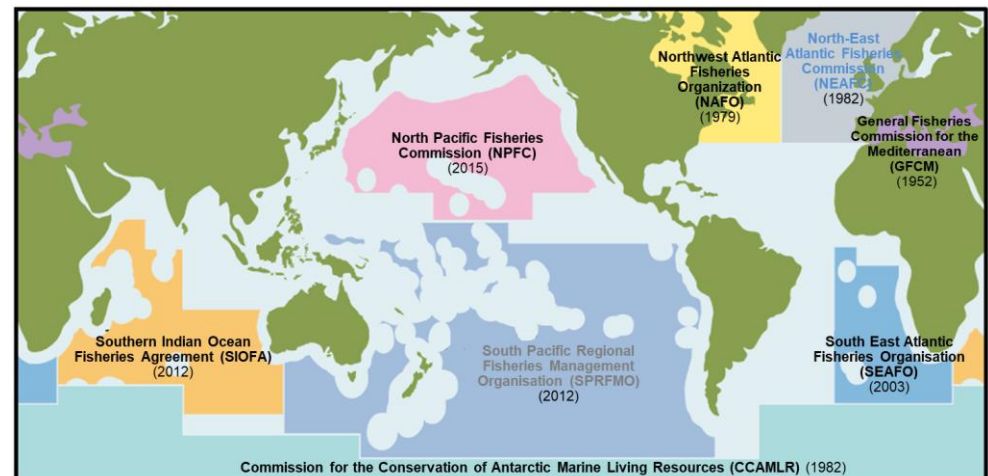
- As the stock of Pacific bluefin tuna dropped close to the historical minimum level, Western and Central Pacific Fisheries Commission (WCPFC) introduced strict measures, including a significant reduction of catches of small fish. As a result of these fisheries resource management efforts, the spawning stock biomass has been on a recovery path. At the 2024 WCPFC Commission Meeting, a measure was adopted to increase the catch limit for small fish by 10% and for large fish by 50%.
- 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: (i) For Pacific saury, the 2025 TAC in the high seas is to 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; (ii) For chub mackerel, the TAC in the high seas is to be reduced by approximately 30%, from 100,000 tons in the previous year to 71,000 tons.

Latest Stock Assessment (2024) and Future Forecast (2025)



Source: Prepared by the Fisheries Agency based on the Stock Assessment of Pacific Bluefin Tuna in the Pacific Ocean in 2024 (ISC), and the meeting document of the IATTC-WCPFC Northern Committee Joint Working Group on the Management of Pacific Bluefin Tuna (IATTC-NC-JWG10-2025/IP-02) (2025)

Major Regional Fisheries Management Organizations Managing Resources Other than Skipjack and Tunas, Such as NPFC, and Waters Covered



Note 1: Japan has not joined the SPRFMO or the NEAFC, and it withdrew from GFCM in 2020.

2: The years in parentheses are the years in which the relevant treaties took effect.

ii. Bilateral Relations in Fisheries

- Japan has concluded bilateral agreements on fisheries with Russia, the Republic of Korea, and China.
- In relation to Russia, Japanese fishing vessels conduct fishing operations 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 so far.
- Mutual fishing access with the Republic of Korea and China is currently suspended.
- Talks have been continued with Taiwan to improve fishing operation rules in the applicable waters based on the Japan-Taiwan Private Fisheries Arrangement. Regarding fishing operation rules for the 2026 fishing season, Japan and Taiwan agreed to provide that voluntary management rules of fishers' bodies on the Taiwan side should be made more effective for preventing fishing gear from drifting out from their fishing vessels.

(2) 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.
- 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 2025

	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	143	56	60	144	10	52
Number captured	143	35	60	88	0	31
Fisheries Agency reserves	0	0	0	0	0	0

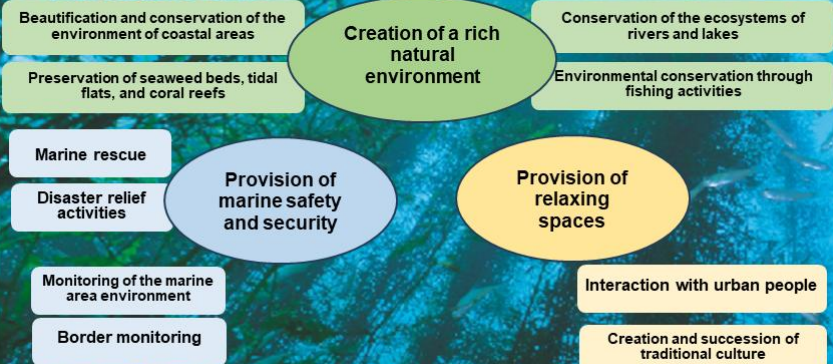
(1) Current Status and Roles of Fishing Communities

- There are many fishing communities along the coastal line of Japan. They are often situated in areas with limited transportation and face challenges in life outside fisheries, which has resulted in population decline.
- 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.

Multifaceted Functions of Fisheries and Fishing Communities

The essential role of the fisheries industry and fishing communities is to provide fresh and safe food stably.

Multifaceted functions are



Roles of seaweed beds and tidal flats fulfilling multifaceted functions

- Seaweed beds and tidal flats absorb and degrade organic substances, nitrogen, and phosphorus, which are included in domestic wastewater and cause contamination in coastal areas, thereby purifying water and bottom sediments and conserving the environment of coastal areas.
- Fishers preserve seaweed beds and tidal flats through the following efforts: at seaweed beds, developing seaweed beds by setting mother algae, etc., and removing living organisms that eat algae (such as sea urchin and vegetable-eating fish); at tidal flats, promoting organics decomposition through tillage, and protecting clams that are superior in purifying water.



(2) Promotion of UMIGYO

- 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 areas 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 an industry complementary to the fisheries industry.

Major Initiatives of UMIGYO



Seafood restaurant at a fishing port
(Hota Fishing Port, Chiba Prefecture)



Seafood market (Kanezaki Fishing Port,
Fukuoka Prefecture)



Fishery experience (Boze Fishing Port,
Hyogo Prefecture)



Fishing village homestay (Habomai
Fishing Port, Hokkaido)

UMIGYO Poster



水産庁

UMIGYO poster

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

- After the Great East Japan Earthquake that occurred in March 2011, efforts for reconstruction were made and the restoration of fishing port facilities has almost been completed at all fishing ports.
- On the other hand, the recovery of the fishery processing industry's sales remains as an issue, and the government continues offering support to fisheries processors for their business reconstruction.

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

- The national government, in cooperation with relevant prefectural governments and fisheries-related organizations, conducts systematic monitoring of radioactive materials in fish and fishery products.
- Efforts have been made to improve the reliability and transparency of data with the support of the International Atomic Energy Agency (IAEA). The IAEA evaluates that Japanese laboratories demonstrate a high degree of accuracy and proficiency.
- Import restrictions on Japanese agricultural, forestry and fishery products and food were initially imposed by 55 countries and regions, but in FY2025, the number of countries and regions maintaining import restrictions decreased to 5.

(3) Initiatives toward Full-scale Fishing Operations off the Coast of Fukushima Prefecture

- After the accident at the Fukushima Daiichi NPS, operations off the coast of Fukushima Prefecture were conducted on a trial basis from 2012 to 2021. The landing volume increased from 122 tons in 2012 to 4,591 tons in 2020.
- Since April 2021, voluntary restrictions have been eased in stages, but the landing volume and the landing value in 2025 were 28% and 47%, respectively, of the pre-disaster level, indicating that recovery is still ongoing.
- It is expected that various initiatives will be implemented, such as holding nationwide events and fish dish cooking classes in Fukushima Prefecture, with the aim of expanding the sales channels of fishery products of Fukushima and that such efforts will lead to a full-scale recovery of fisheries in Fukushima.

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

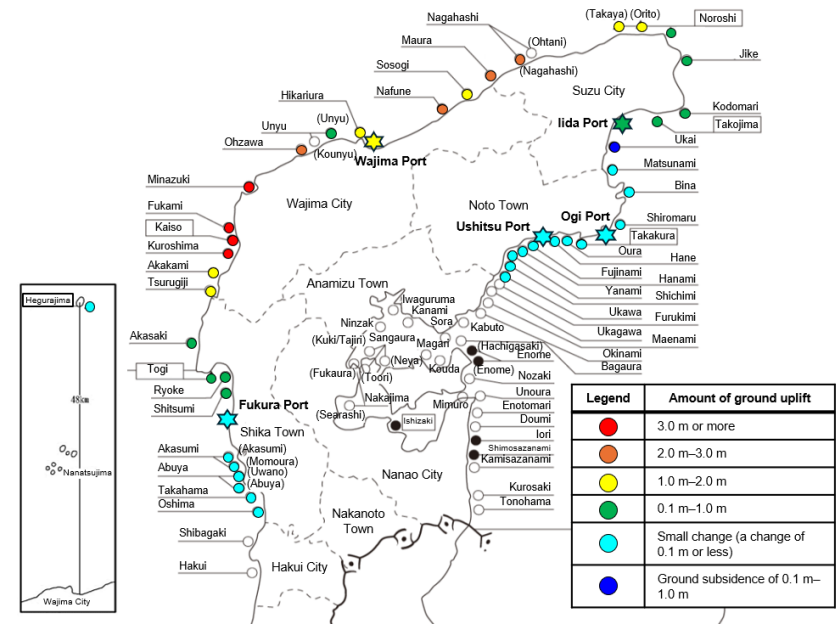
i. Situation of Damage Related to the Fisheries Industry

- On January 1, 2024, an earthquake occurred in the Noto Peninsula region of Ishikawa Prefecture.
- 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 uplift and other factors.

ii. Initiatives for Restoration/Reconstruction of the Fisheries Industry

- Thanks to the progress of the restoration of fishing port facilities and common facilities, which are necessary for fishing operations, catches recovered favorably.
- On January 19, 2024, this earthquake was designated as an extraordinary disaster, and it became possible for the national government to carry out a disaster recovery project for the prefecture and disaster-affected municipalities. Receiving requests from the governor of Ishikawa Prefecture and the mayor of Suzu City, the Fisheries Agency conducts works for some fishing port areas.
- 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.

Land Deformations at Fishing Ports



* The amounts of land deformations are those measured in surveys or provisional values based on reference materials provided by municipalities, and may be altered in the future.

Structure of “FY2026 Fisheries Policy”

Overview

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

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

- Enhancement of fisheries resource survey and stock assessment
- Steady promotion of fisheries 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 Fisheries 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