

～水産業の持続性と輸出促進～

— Sustainability of the Fisheries Industry and Export Promotion —

TSSS2025 パネルディスカッション

「世界が求める水産物、拡大する水産物需要と輸出の壁」 資料

TSSS2025 Panel Session Material:

“The Growth of Global Demand for Japanese Seafood and Export Barriers”

2025年10月2日
大日本水産会 高瀬美和子

October 2, 2025
Miwako Takase
Japan Fisheries Association

大日本水産会とは The Overview of the Japan Fisheries Association

○**目的** 国民に安全で安心な水産物を、安定的に供給し、国民生活の安定と向上に寄与するため、水産業の振興を図り、その経済的・文化的発展を推進すること。

Objective: To promote the fisheries industry in order to supply safe and reliable seafood stably to the public and contribute to stable and better livelihoods of people, as well as advancing economic and cultural development.

○**設立** 明治15年(1882年)2月(今年で創立143周年)。**Established:** February 1882, marking its 143rd anniversary this year.

○**会員** 水産業にかかわる我が国の代表的な団体や会社 575(2025年3月末現在)。

Membership: 575 leading organizations and companies involved in Japan's fisheries industry (as of the end of March 2025).

○**運営** 会員からの会費収入が基本。**Operations:** Primarily funded through membership fees.

会 長 President

枝元 真徹 Masaaki Edamoto

副会長6名(順不同) Vice Presidents

池見 賢 Masaru Ikemi
マルハニチロ(株) 代表取締役社長
President, Maruha Nichiro Corporation

田中 輝 Teru Tanaka
(株)ニッスイ 代表取締役社長
President, Nissui Corporation

大櫛 顕也 Kenya Okushi
(株)ニチレイ 代表取締役社長
President, Nichirei Corporation

坂本 雅信 Masanobu Sakamoto
全国漁業協同組合連合会 代表理事会長
President, National Federation of Fisheries
Co-operative Association

香川 謙二 Kenji Kagawa
日本かつお・まぐろ漁業協同組合 代表理事組合長
President, Japan Tuna Fisheries Co-operative
Association

吉田 猛 Takeshi Yoshida
(一社)全国水産卸協会 会長
President, Japan Fish-Wholesalers' Association

主な業務活動 Primary operations

○ 漁政部 Fishery Administration Div.

- ・水産業界の要望を行政・政治に伝え業界をサポート
- ・進むべき方向に業界をリード
- ・Convey the fisheries industry's requests to the government and policymakers to support the sector
- ・Lead the industry in the direction it should take

○ 魚食普及推進センター

Seafood Consumption Promotion Center

- ・水産物消費拡大のための魚食普及活動(おさかな学習会等)
- ・Promote fish consumption through awareness-raising and educational activities (e.g., fish education workshops)

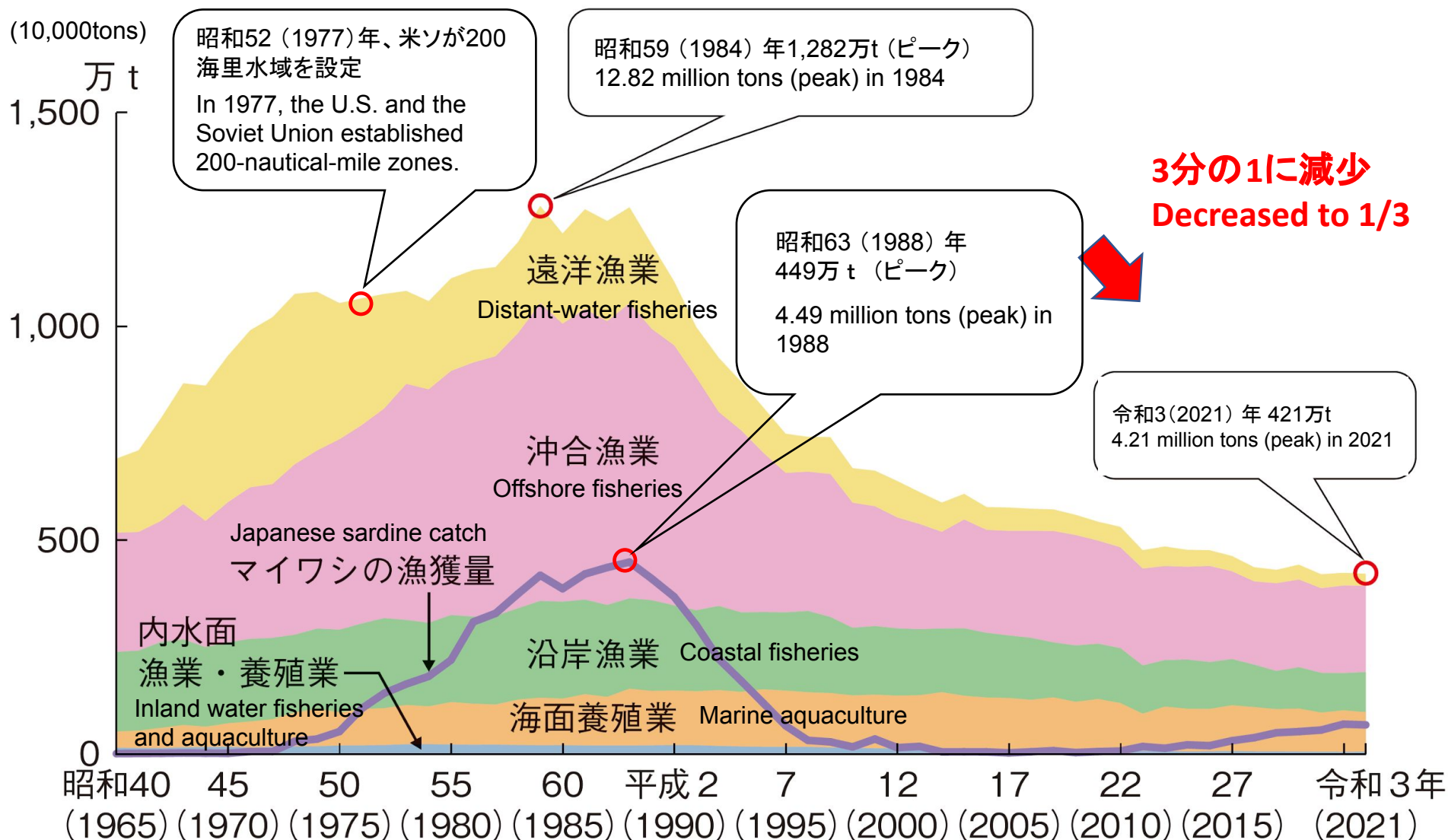
○ 事業部 Operation Div.

- ・漁業に関する民間の二国間・多国間の国際会議
- ・海事関係、海上労働等への対応
- ・Participate in private-sector bilateral and multilateral international conferences on fisheries
- ・Address maritime affairs, seafaring labor, and related issues

○ 輸出促進部 Export Promotion Div.

- ・輸出促進に関する取組み
- ・品質衛生管理の向上
- ・Implement initiatives to promote exports
- ・Improve quality and hygiene management

我が国漁業・養殖業生産量の推移 Trends in Japan's Fishery and Aquaculture Production



国内外のマーケットの変化

Promoting Changes in Domestic and International Markets

○国内の市場規模は、人口減少や高齢化に伴い、縮小の可能性。一方、世界の農林水産物マーケットは、人口の増加に伴い、拡大する可能性。

○国内外のマーケットの変化に鑑みれば、農林水産業の生産基盤を強化し、農林水産物・食品の輸出促進により世界の食市場を獲得していくことが重要。

- The domestic market size may shrink due to population decline and aging. On the other hand, the global market for agricultural, forestry, and fishery products is likely to expand as the population increases.
- In light of the changes in domestic and global markets, it is important to strengthen the production base of the agriculture, forestry, and fisheries industries and capture the global food market by promoting exports of agricultural, forestry, and fisheries products and food products.

国内 Domestic

年 Year

人口 Population

1990(年)

1億2,361万人
123.61 million

2020(年)

1億2,586万人
125.86 million

▲ 20%

2050(年)

1億190万人
119 million

高齢化率 (65歳以上の割合)
Population aging rate
(% of the population 65 years
old or older)

12.1%

28.7%

人口減少、高齢化に伴い、
国内の市場規模は縮小の可能性
Market size in Japan may shrink
due to declining and aging
population

飲食料のマーケット規模
Food and Beverage Market Size

72兆円
72 trillion yen

84兆円 (2015年)
84 trillion yen (2015)

漁業総産出額
Gross Fishery Production

2.6兆円
2.6 trillion yen

1.3兆円
1.3 trillion yen

世界 Global

人口 Population

53億人 5.3 billion

78億人 7.8 billion

+ 30%

98億人 9.8 billion

飲食料のマーケット規模 (主要国)
Food and Beverage Market
Size (Major Countries)

890兆円 (2015年)
890 trillion yen (2015)

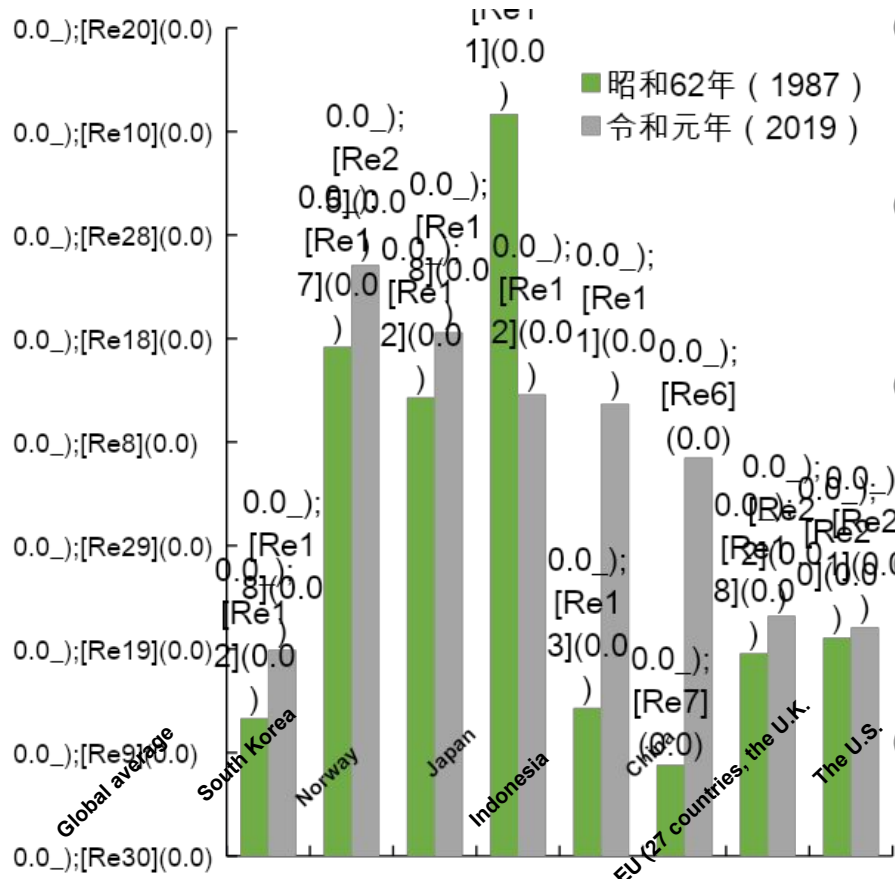
1,360兆円 (2030年)
1,360 trillion yen (2030)

世界の農林水産物マーケット
は拡大の可能性
The global market for
agricultural, forestry, and
fishery products has
potential for growth

高まる世界の水産物需要と減少する日本の消費

Rising global demand for seafood and declining domestic consumption in Japan

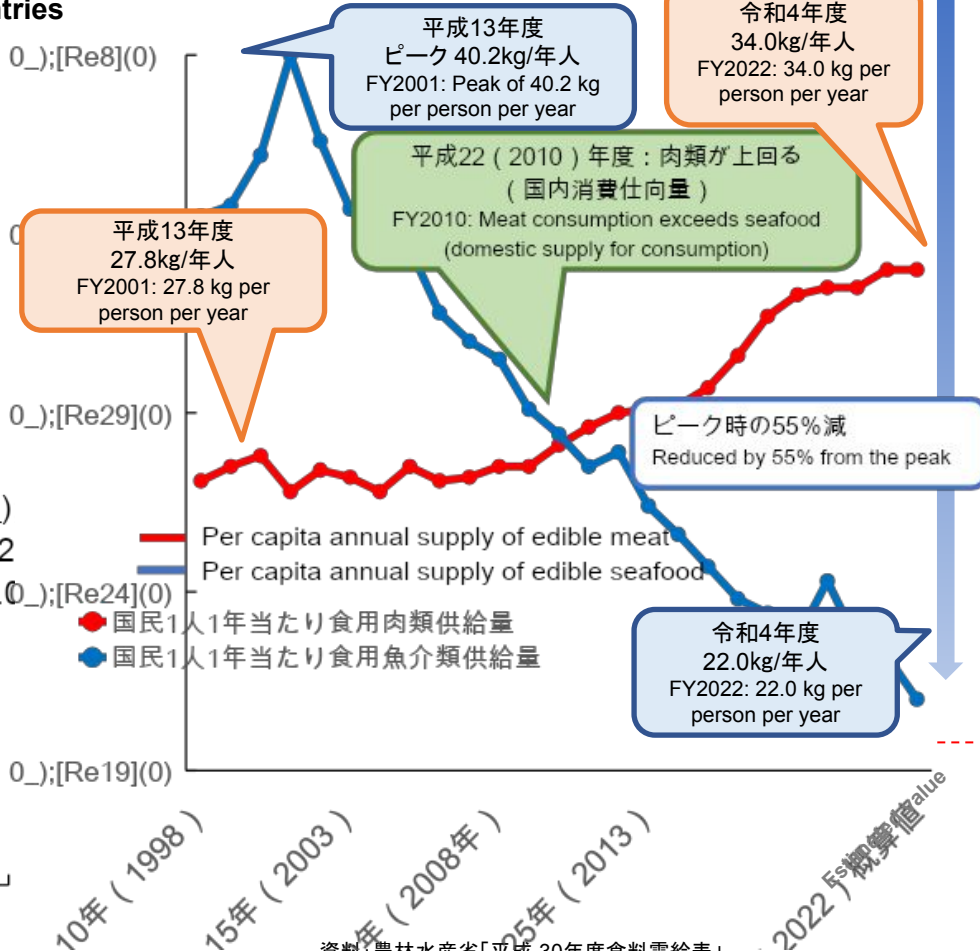
世界の食用魚介類の年間国内消費量(粗食料ベース)の推移
(1人当たり主要国別)
Trends in annual domestic consumption of edible seafood
worldwide (gross food basis), per capita by major countries



資料: FAO「Food Balance sheets」(日本以外の国)、農林水産省「食品需給表」
注: 1) 粗食料ベースの数値
2) 粗食料とは、廃棄される部分も含んだ食用魚介類の数量

Sources: FAO, Food Balance Sheets (for countries other than Japan)
Ministry of Agriculture, Forestry and Fisheries, Food Supply and Demand Statistics (Japan)
Notes: 1) Values are based on a gross food basis.
2) Gross food refers to the quantity of edible seafood, including parts that are discarded.

魚介類と肉類の1人当たり年間消費量(純食料)の推移
Trends in annual seafood and meat consumption
(net food basis)

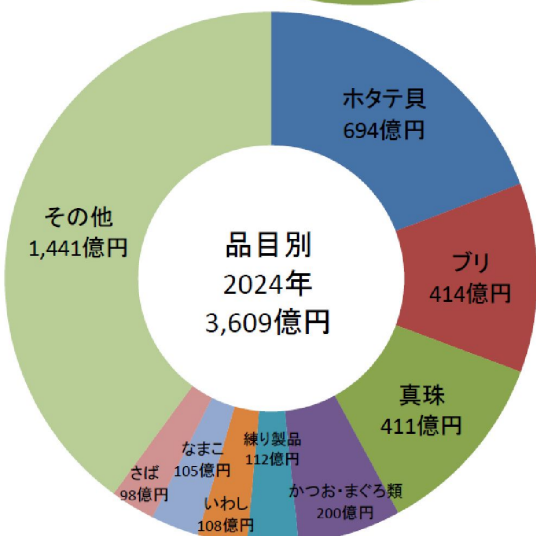
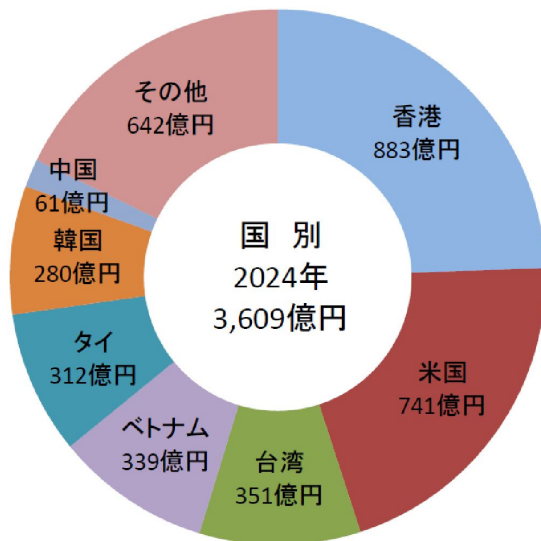


資料: 農林水産省「平成 30年度食料需給表」
注: 1) 純食料ベースの数値
2) 純食料とは、可食部分のみの数量

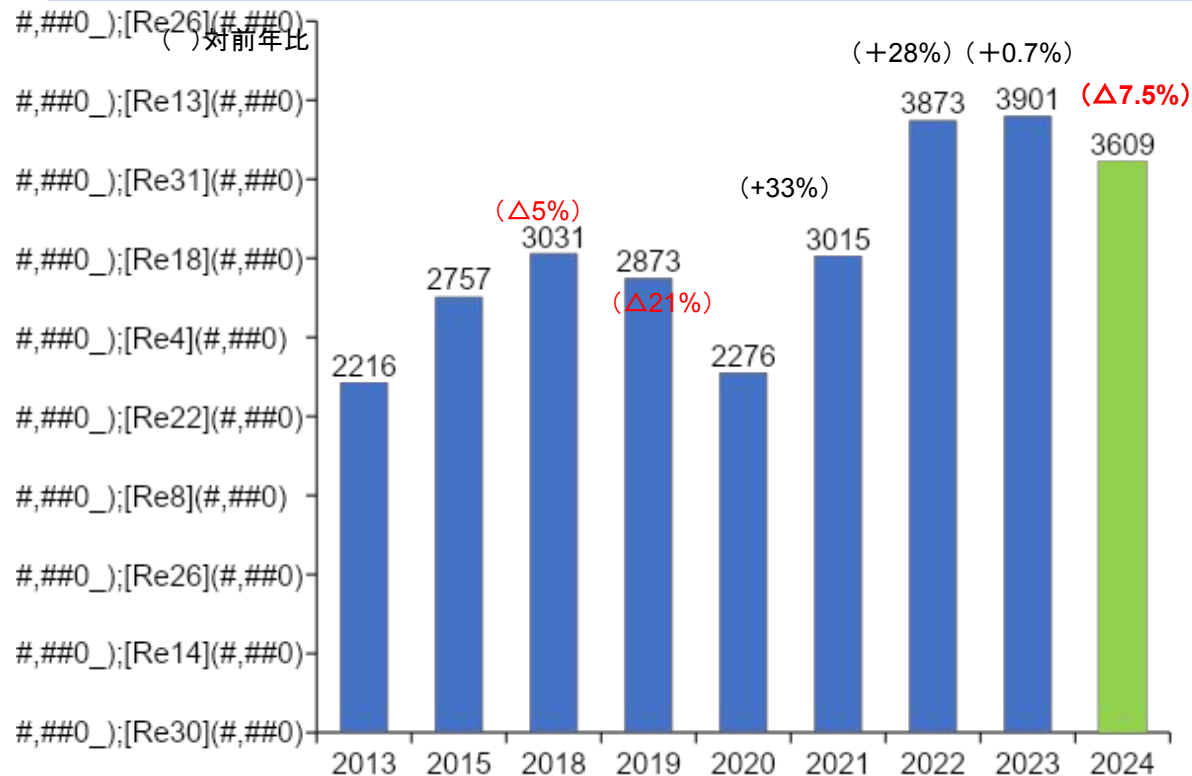
Source: Ministry of Agriculture, Forestry and Fisheries, Food Supply and Demand Statistics, FY2018
Notes: 1) Values are based on a net food basis.
2) Net food refers to the quantity of edible parts only.

水産物輸出額の推移

2024年の水産物輸出額、3,609億円



○2024年の水産物輸出実績は**3,609億円(前年比 7.5%減)**で農林水産物・食品輸出額全体1兆5,073億円の**24%**を占める。
 ○**ホタテ**は**米国・台湾・ベトナム**向けが増加(**前年比0.9%増**)。
 ○その他は、ブリ(414億円、0.8%減)、真珠(411億円、9.7%減)、かつお・まぐろ類(200億円、11.3%減)と金額ベースでは減少。
 ○国別輸出額では、香港、米国への輸出額が増加する一方、**中国は61億円(89.9%減)と大幅に輸出額が減少**。
 ○本会においてはアジア圏を中心に、フィリピン・台湾・韓国・マレーシア・シンガポール・ベトナム等においてプロモーション活動を実施。
 ○**JETRO・JFOODO・本会**の三者により「**日本産水産物の輸出促進に向けた連携協定**」を締結、今後より一層の輸出拡大に取り組む。



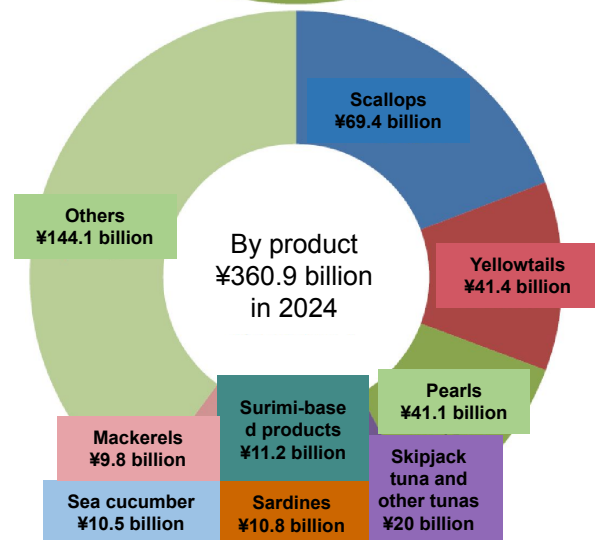
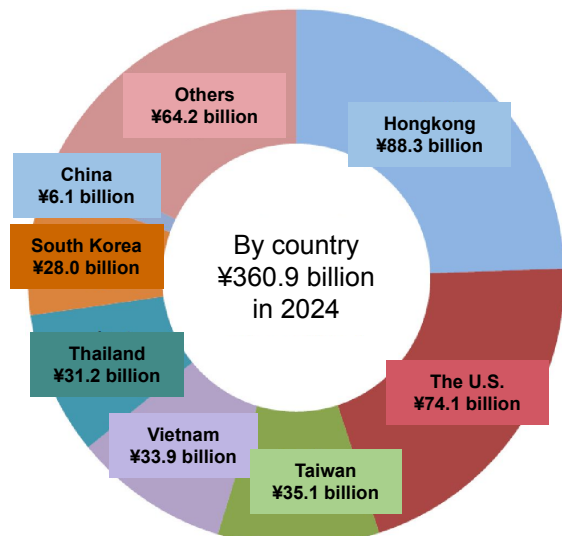
注) 近年の水産物の輸出額の過去最高は、1987年の3,033億円

資料: 財務省「貿易統計」

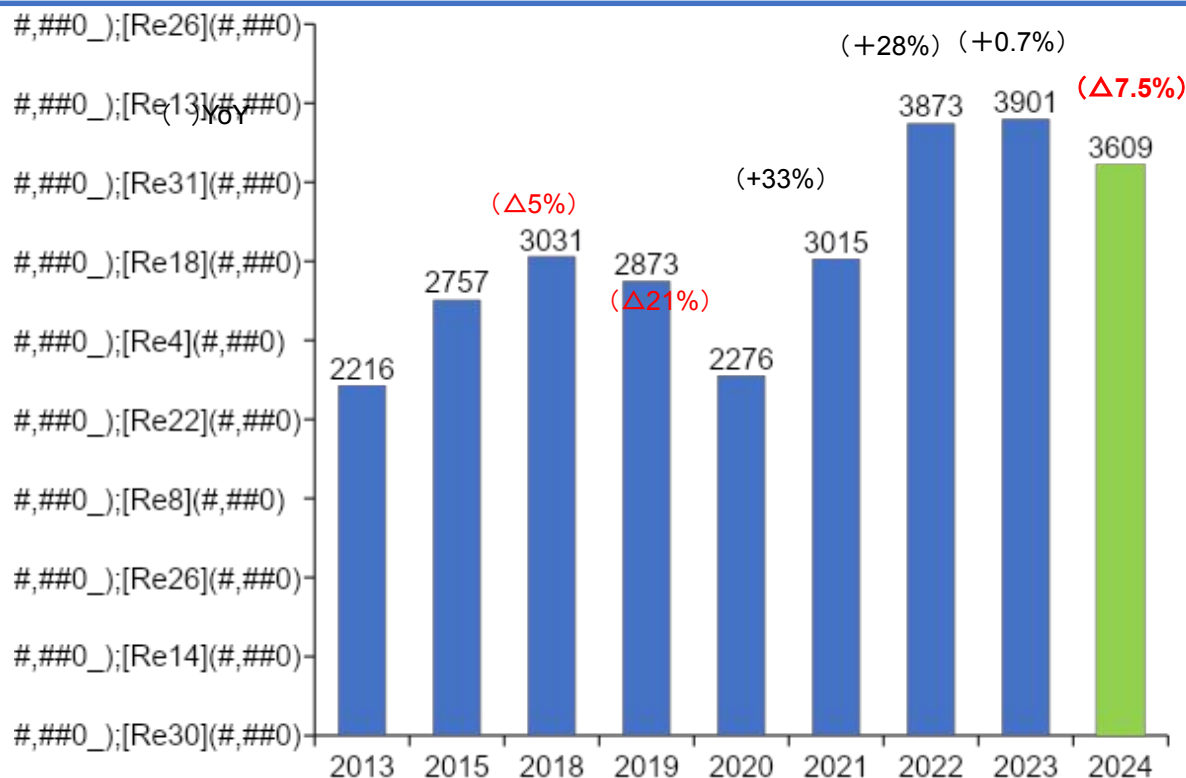
資料: 農林水産省「農林水産物輸出入情報」

Trends in seafood export values

The amount of seafood exports in 2024
¥360.9 billion



- In 2024, seafood exports totaled **¥360.9 billion, a 7.5% decrease from the previous year**, accounting for **24%** of the total exports of agricultural, forestry, and fishery products, which amounted to ¥1.5073 trillion.
- Exports of **scallops** increased to **the United States, Taiwan, and Vietnam, up 0.9% year-on-year**.
- Other products decreased in value, including yellowtail (¥41.4 billion, down 0.8%), pearls (¥41.1 billion, down 9.7%), and skipjack tuna and other tunas (¥20.0 billion, down 11.3%).
- By country, exports to Hong Kong and the United States increased, whereas **exports to China fell sharply to ¥6.1 billion, a 89.9% decrease**.
- The association holds promotional activities mainly in Asian markets, including the Philippines, Taiwan, South Korea, Malaysia, Singapore, and Vietnam.
- JETRO, JFOODO, and the association have signed a trilateral agreement to promote Japanese seafood exports**, continuing efforts to further expand exports.



Source: Ministry of Agriculture, Forestry and Fisheries, *Information on Imports and Exports of Agricultural, Forestry and Fishery Products*

Note: The recent historical peak of Japan's seafood export value was ¥303.3 billion in 1987.

Source: Ministry of Finance, *Trade Statistics*

水産業の生産力向上と持続性の両立に向けた取り組み

Efforts to Improve Productivity and Sustainability of the Fishing Industry

漁場・ 資機材

1. 漁場環境の保全、 環境負荷軽減の推進

- (1) 水産資源の維持・増大
 - ・資源調査・評価の充実・科学的知見に基づく資源管理
- (2) 藻場・干潟の保全、創造
- (3) 漁船・漁具の環境負荷低減
 - ・電化・燃料電池化、LED照明等の活用
 - ・漁具・漁網のリサイクルの推進
- (4) 養殖における環境負荷低減
 - ・沖合域を含む養殖適地の確保、浮沈式生簀等の普及
 - ・養殖種苗の人口種苗化
 - ・輸入魚粉に依存しない配合飼料、魚粉代替飼料の開発
- (5) 漁港施設等への再生可能エネルギー導入や省エネ対策

2. 海洋環境の変化も踏まえた持続的 かつ効率的な生産体制の構築

- (1) 生産性・労働環境・安全性の向上、環境負荷低減
 - ・漁船・養殖施設を含め、漁業・養殖のスマート化、効率化
 - ・効率的操業を可能にするための漁船、養殖施設、機器等の導入
 - ・労働環境の改善、若者の就業促進、女性の活躍
- (2) 海洋環境に柔軟に対応した生産体制
 - ・獲れる魚種・漁場の変化に対応できる漁法
 - ・漁獲対象種や漁法の複合化・転換
 - ・養殖種苗の改良、育種技術開発
- (3) 経営の安定

生産

多様な魚食文化の維持・発展
国民への水産物の供給
地域の所得・雇用の増大
地球・海洋環境の保全

消費

4. 持続可能な消費の拡大 や魚食普及、食育の推進

- (1) 消費者ニーズへの対応、付加価値の向上
- (2) 魚食普及、食育の推進による需要の喚起、食品ロス対応
- (3) 持続可能な水産物の消費拡大(水産エコラベルの活用)
- (4) 輸出促進
- (5) 適切な価格転嫁
- (6) 消費者と生産者の相互理解促進、海業の推進

3. 持続可能な加工・ 流通システム 確立

- (1) 産地市場、流通の機能強化、合理化
 - ・ICT等の新たな技術や最新の冷凍技術・鮮度保持技術等の活用
 - ・多様な流通ルート構築
 - ・IUU漁獲物の排除
- (2) 加工業の生産性向上、環境変化への適応
 - ・持続可能な加工原料の調達(加工原料の転換や多様化)
 - ・先端技術を活用した機器の導入による生産性向上
 - ・環境負荷低減に資する機器の導入
 - ・ESG、人権

加工・ 流通

水産業の生産力向上と持続性の両立に向けた取り組み

Efforts to Improve Productivity and Sustainability of the Fishing Industry

Fishing grounds, Materials and Equipment

1. Preservation of the fishing ground environment, promotion of environmental load reduction

- (1) Maintenance and increase of fishery resources
 - Resource management based on scientific knowledge and enhancement of resource research and assessment
- (2) Preservation and creation of seaweed beds and tidal flats
- (3) Reduction of environmental impact of fishing boats and gear
 - Electrification, use of fuel cells, LED lighting, etc.
 - Promotion of recycling of fishing gear and nets
- (4) Reduction of environmental impact of aquaculture
 - Secure suitable aquaculture sites, including offshore areas, and promote the use of floating and sinking fish ponds, etc.
 - Use of artificial seedlings for aquaculture
 - Development of formula feeds that do not depend on imported fishmeal and alternative feeds to fishmeal
- (5) Introduction of renewable energy and energy-saving measures in fishing port facilities, etc.

Production

2. Building a sustainable and efficient production system that also takes into account changes in the marine environment

- (1) Improve productivity, working environment and safety, and reduce environmental impact
 - Promoting smart and efficient fishing and aquaculture, including fishing vessels and aquaculture facilities
 - Introduction of advanced fishing vessels, aquaculture facilities, and equipment to enable efficient operations
 - Improvement of the working environment, promotion of youth employment, and active participation of women
- (2) Production system that flexibly responds to the changing marine environment
 - Fishing methods that can respond to changes in the species caught and fishing grounds
 - Combining and conversion of fishing methods and target species
 - Improvement of aquaculture seedlings and development of cultivation technology
- (3) Management stability



Consumption

4. Expanding sustainable consumption, promoting fish diets and dietary education

- (1) Respond to consumer needs and increase added value
- (2) Promote fish consumption, stimulate demand by promoting nutrition education, and address food loss
- (3) Increase consumption of sustainable marine products (increase awareness of marine products eco-label)
- (4) Promote exports
- (5) Appropriate price pass-on
- (6) Promotion of mutual understanding between consumers and producers, promotion of the marine industry

Processing and Distribution

3. Establishment of sustainable processing and distribution system

- (1) Strengthening and streamlining the functions of local markets and distribution
 - Utilization of new technologies such as ICT and the latest freezing and freshness preservation technologies
 - Establishment of diverse distribution routes
 - Elimination of IUU catches
- (2) Improve productivity of the processing industry and adapt to environmental changes
 - Procurement of sustainable processing materials (conversion and diversification of processing materials)
 - Improve productivity through the introduction of equipment that utilizes cutting-edge technology
 - Introduction of equipment that contributes to reduction of environmental impact
 - ESG, human rights

○水産エコラベル

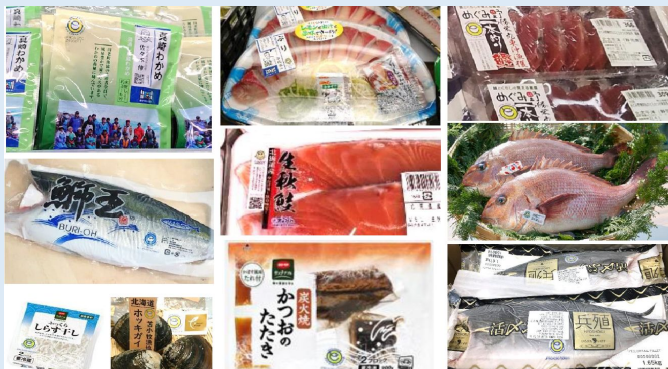
資源や生態系の持続的利用に取り組む漁業・養殖業で生産された製品の積極的な選択を促すことで、水産業の持続的発展を消費者・流通の社会全体でサポートする。

MEL協議会による MEL認証の特徴

- ・FAOのガイドライン及びISOのルールに準拠した国際標準の第三者認証制度。
 - ・生物、環境、産業や食文化等の **豊かな多様性** に恵まれた **日本の水産業** の実態に対応。
 - ・国内の漁業・養殖業、国内・海外の流通加工（CoC）を対象とする **国際承認スキーム** 。
- （GSSI新基準（ベンチマークツール Ver2.0）承認 令和5年9月21日 *世界で2番目に取得）

○これからのMEL

- ・水産エコラベルの目的は資源の持続性と環境の保全であったが、求められる役割は拡大。
- ・新時代に対応し、労働者の人権や気候変動など社会課題を考慮した規格改正
- ・**海外スキームと連携** や会員に海外企業・団体が参加
- ・養魚用配合飼料、魚粉・魚油に関する認証規格の開発



MELの使命は、生態系と水産資源を守り持続的に利用すると同時に、**産業の持続性を守る** 制度を目指す

○国内外の普及促進活動

- ・日本の水産業の持続的な取り組みを世界に発信
- ・シーフードショーなど展示会やイベントへの出展による制度の紹介
- ・出前授業や親子教室を通じたファミリー層や若年層への啓発、共感形成
- ・MELアンバサダー（SNSイン）を通じた情報発信



○国際連携

2025年4月にアメリカのCSCとの間でCoC認証に関し相互承認の覚書を締結。CSCはCSI（サーティファイドシーフードインターナショナル）に移行し、世界規模で展開する競争力のある認証プログラムを準備中

Promotion of Japan's Marine Eco-Label

○ Marine Eco-Label (MEL)

By encouraging the active selection of products produced by fisheries and aquaculture engaged in the sustainable use of resources and ecosystems, the entire society—including consumers and the distribution sector—supports the sustainable development of the fisheries industry.

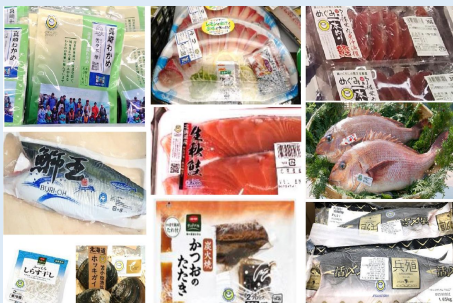
Characteristics of MEL Certification by the MEL Japan Council

- A third-party certification system based on international standards in compliance with FAO guidelines and ISO rules.
- Responds to the reality of **Japan's fisheries industry, which is** blessed with a **rich diversity** of living organisms, the environment, industries, and food cultures.
- **An international certification scheme** covering domestic fisheries and aquaculture, as well as domestic and overseas distribution and processing (CoC).

(GSSI New Standard (Benchmark Tool Ver. 2.0) approval obtained on September 21, 2023) (*second in the world to obtain the approval)

○ The Future of MEL

- The original objective of the Marine Eco-Label was to promote the sustainability of resources and conserve the environment; however, its required roles are expanding.
- Revisions to standards required to address various social issues such as workers' human rights and climate change in response to the new era.
- **Collaboration with overseas schemes** and participation of overseas companies and organizations as members.
- Development of certification standards for compound aquaculture feeds, fishmeal, and fish oil.



MEL's mission is to protect ecosystems and marine resources and ensure their sustainable use, while also aiming to establish a system that can maintain the sustainability of the industry.

○ Promotion and Awareness-Raising Activities in Japan and Abroad

- Communicating Japan's sustainable fisheries initiatives to the world.
- Introducing the system through participation in exhibitions and events such as seafood shows.
- Raising awareness and fostering empathy among younger generations and families through school lectures and parent-child education programs.
- Disseminating information through MEL Ambassadors (influencers on social media, etc.).



○ International Collaboration

In April 2025, a memorandum of understanding was signed with CSC based in the United States regarding the mutual recognition of CoC certification.

CSC has transitioned to CSI (Certified Seafood International) and is preparing a globally competitive certification program.

MEL

合計

漁業

養殖

CoC

281件

25件

72 件

184

件



**MEL 認証された
水産物**（生産段階認証）

2025年5月20日現在



MEL認

Total
281件

Fisheries
25件

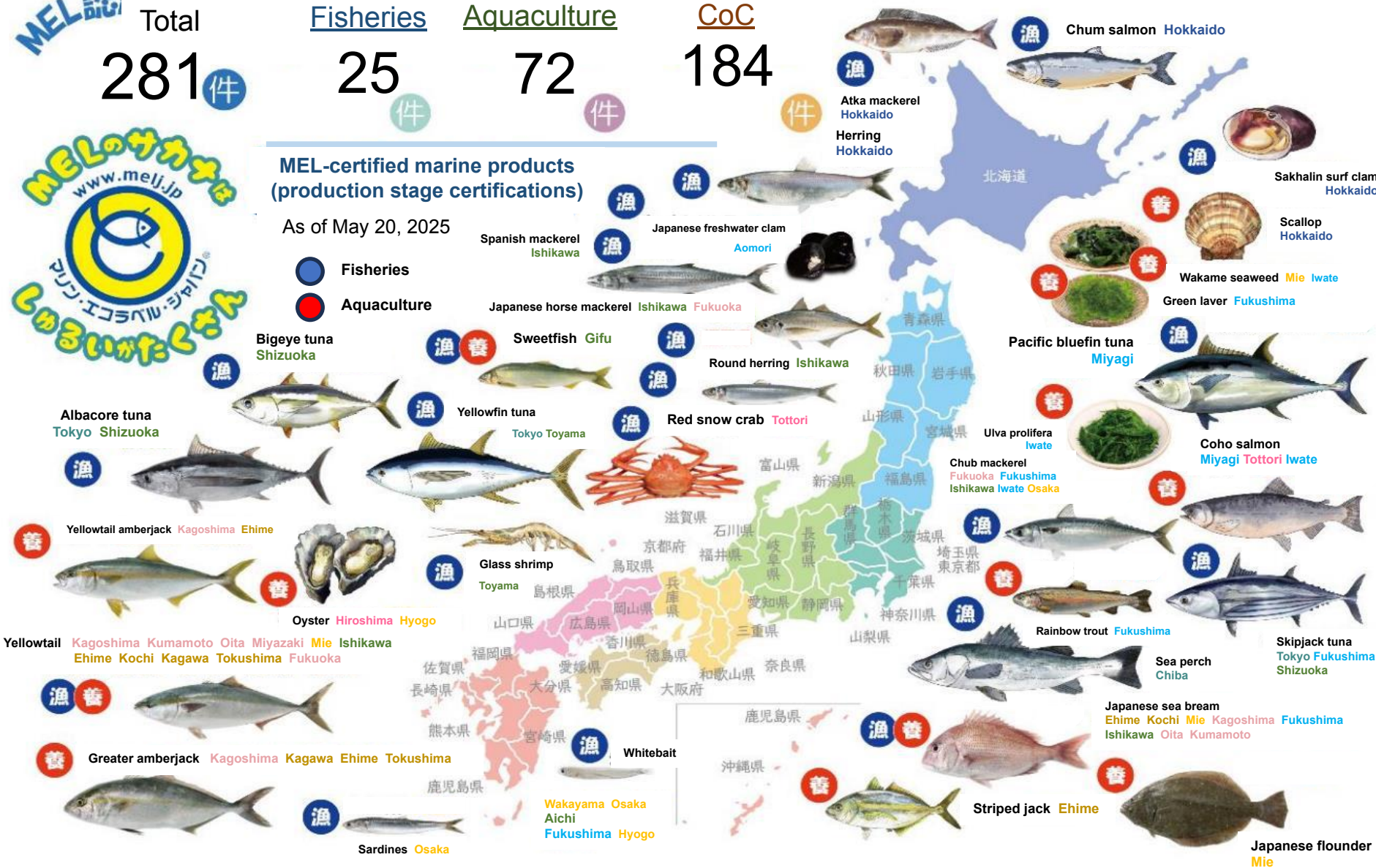
Aquaculture
72件

CoC
184件

MEL-certified marine products
(production stage certifications)

As of May 20, 2025

- Fisheries
- Aquaculture



MELの人権・労働関係に関する取組

Human Rights and Labor-related initiatives of MEL

- 養殖規格では、2018年発効 (Ver. 1.0) 時から、次の指標で労働者の人権について要求。

Aquaculture Standard requires workers' human rights since 2018 (Ver. 1.0)

- 1.1.3 養殖従事者は、関係法令に基づいた賃金、福利厚生及び労働条件が提供されており、適切な健康管理が実施されているほか、適切な労働環境が確保されていること。

Workers shall be treated fairly, with appropriate wages, welfare, and working conditions in accordance with the relevant laws and regulations. Proper health management and working

- 1.1.4 児童労働等違法な労働が行われていないこと。

The use of child labor or other illegal labor is strictly prohibited.

- 漁業規格では、関係法令の遵守を申請者の資格として求めているが、原則 1 (管理体制) に審査項目として新設すべく、改正手続き中。

Fisheries Standard require compliance with relevant laws and regulations as applicant qualification.

To further clarify, revision is currently underway to add following audit indicators in Principle 1 (management system).

- 1.1.4 ① 漁業従事者は、船員法や労働関係法令に基づいた賃金、福利厚生及び労働条件が提供されており、適切な健康管理が実施されているほか、適切な労働環境が確保されていること。

Workers shall be treated fairly, with appropriate wages, welfare, and working conditions in accordance with the Mariners Act and labor-related laws and regulations. Proper health management and working environment shall be secured.

- ② 強制労働、児童労働、賃金の未払い、旅券の没収など、労働者の人権侵害が起きていないこと。

There are no violations of workers' human rights, such as forced labor, child labor, non-payment of wages, or confiscation of passports.

趣旨

- 水産物輸出については、2023年8月のALPS処理水放出にともなう中国等による水産物禁輸措置を踏まえた**輸出先多角化の推進**、気候変動等を踏まえた**水産資源の管理**、**水産業の持続可能性の確保**などが新たな課題。
- 新たな課題に対応するため、①水産物の生産・加工・輸出等を行う事業者・団体からなる「**大日本水産会**」と、②海外販路の開拓を担う「**ジェトロ**」、③食文化普及やプロモーションを担う「**JFOODO**」の3者は、水産物の輸出拡大に向けた連携協定を2025年2月3日に締結。

協定の概要



具体的な取組

- 各地域でジェトロ（本部/貿易情報センター）は、国、都道府県、各水産関係団体・事業者と連携して、水産物の輸出拡大に向けて**総合的なサポートを実施**。
- 3者が連携し、**海外向け販路の新規開拓・多角化、豊かな魚介類を活かす日本の食文化の発信等**を推進し、**品目・地域を越えたオールジャパンによる総合的な水産物輸出拡大の取組を強化**（2月19-20日には大日本水産会主催のシーフードショー大阪に合わせて、ジェトロが海外バイヤー招へいを併催）。
- 輸出促進に資するよう、気候変動や担い手減少等の課題に対応して、「水産エコラベル」の普及・活用、革新的な養殖技術の導入などイノベーションの推進など、3者が連携し、**持続可能な水産業の確立に向けた取組を強化**。

Regarding the Conclusion of a Collaboration Agreement between JETRO, JFOODO, and the Japan Fisheries Association

Purpose

- Regarding seafood exports, new challenges have emerged, including the need to **diversify export destinations** in response to import bans on seafood by China and other countries following the release of ALPS-treated water in August 2023, **the management of marine resources** in light of climate change, and **ensuring the sustainability of the fishing industry**.
- To address these new challenges, three parties—(i) **the Japan Fisheries Association**, composed of businesses and organizations engaged in seafood production, processing, and export; (ii) **the Japan External Trade Organization (JETRO)**, responsible for developing overseas sales channels; and (iii) **The Japan Food Product Overseas Promotion Center (JFOODO)**, responsible for promoting food culture and related campaigns—signed a collaboration agreement on February 3, 2025, aimed at expanding seafood exports.

Overview of the agreement

- Provision of information on overseas regulatory trends and market trends
- Support for skills development for export
- Various support for participation in overseas trade fairs and business meetings
- Provision of opportunities for business negotiations between certified companies and overseas buyers
- Promotion of innovation
- Support for the recruitment of highly skilled foreign personnel

- Promotion of food culture and related activities
- Various consumer-oriented promotional initiatives



- Information gathering and support through the activities of the Council for the Expansion of Exports of Marine Products and Processed Marine Products
- Identification of potential exporters through SFS Tokyo and Osaka
- Joint hosting of seminars on general hygiene management, HACCP, and other sanitary management practices
- Holding seminars to promote marine eco-labels
- Cooperation in the Japan Pavilion at overseas seafood shows (promotion of MEL, etc.)

Specific initiatives

- JETRO (Headquarters/Trade Information Center) in each region will collaborate with the national and prefectural governments, as well as various fisheries-related organizations and businesses, to **provide comprehensive support** for expanding seafood exports.
- The three parties collaborate to **promote the development and diversification of new overseas sales channels**, as well as **the dissemination of Japan's rich seafood culture**, strengthening **all-Japan, comprehensive efforts to expand seafood exports across different product categories and regions** (on February 19-20, JETRO also hosted an overseas buyer invitation event on the sidelines of the Seafood Show Osaka organized by the Japan Fisheries Association).
- To further promote exports, the three parties collaborate to **strengthen initiatives aimed at establishing a sustainable fisheries industry**, including promoting and utilizing “marine eco-labels,” introducing innovative aquaculture technologies, and addressing various challenges such as climate change and the decline in the industry workforce.