U.S.-Japan Maritime Symposium 2026

~Strengthening the Maritime Industrial Base through U.S.-Japan Public-Private Partnerships~

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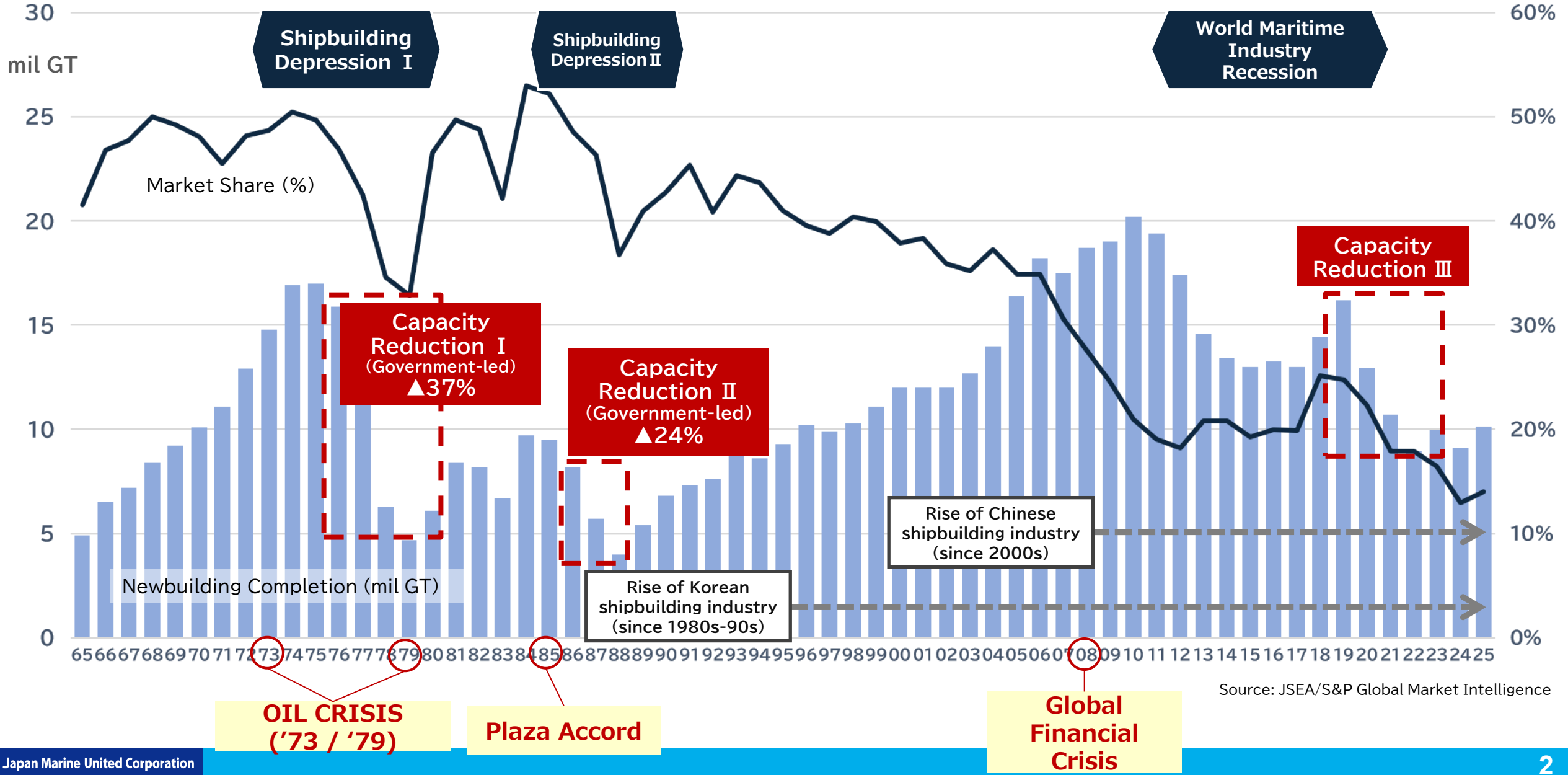
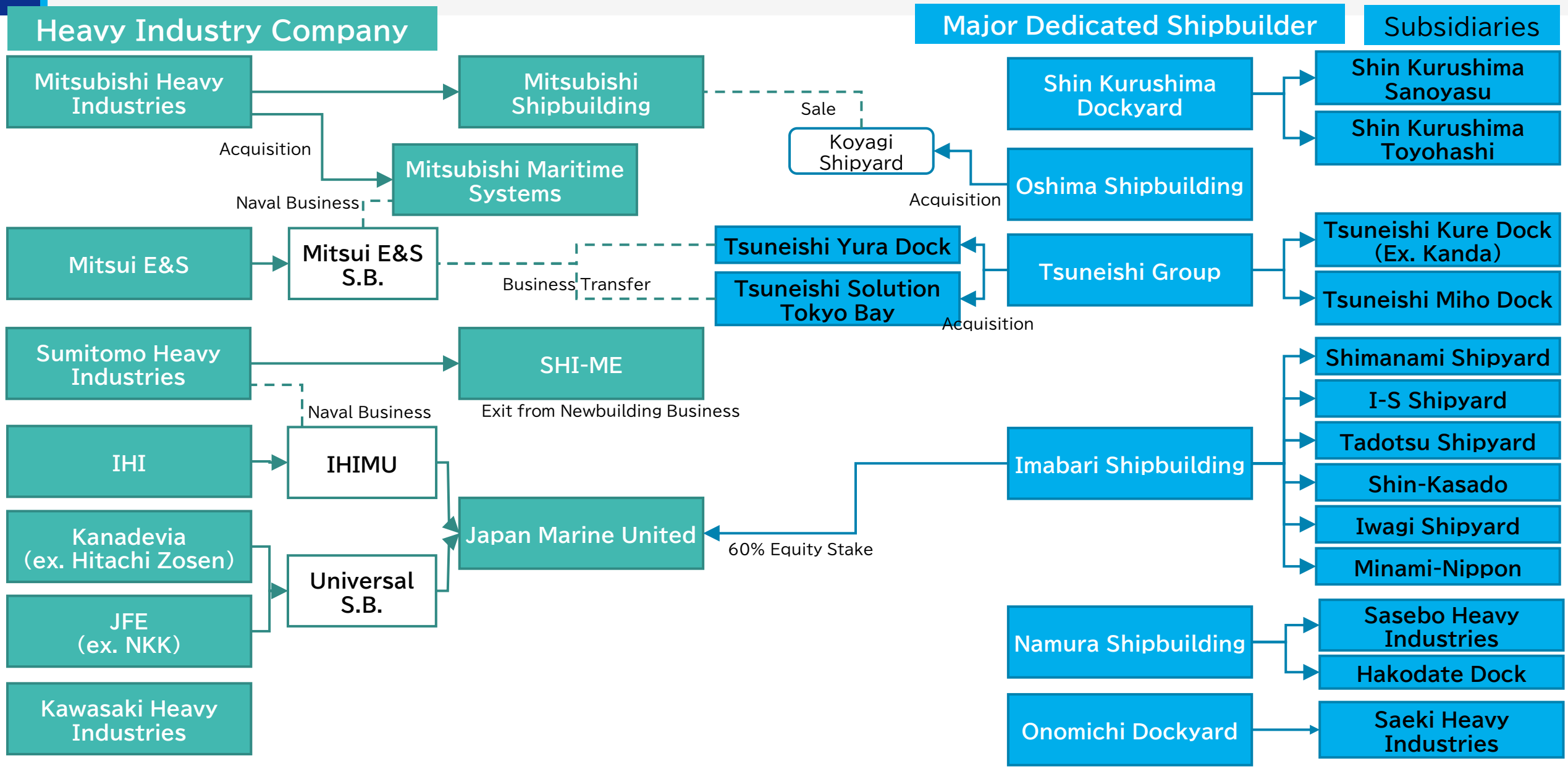
JAPAN's Newbuilding Completion (GT) / Global Market Share (%)

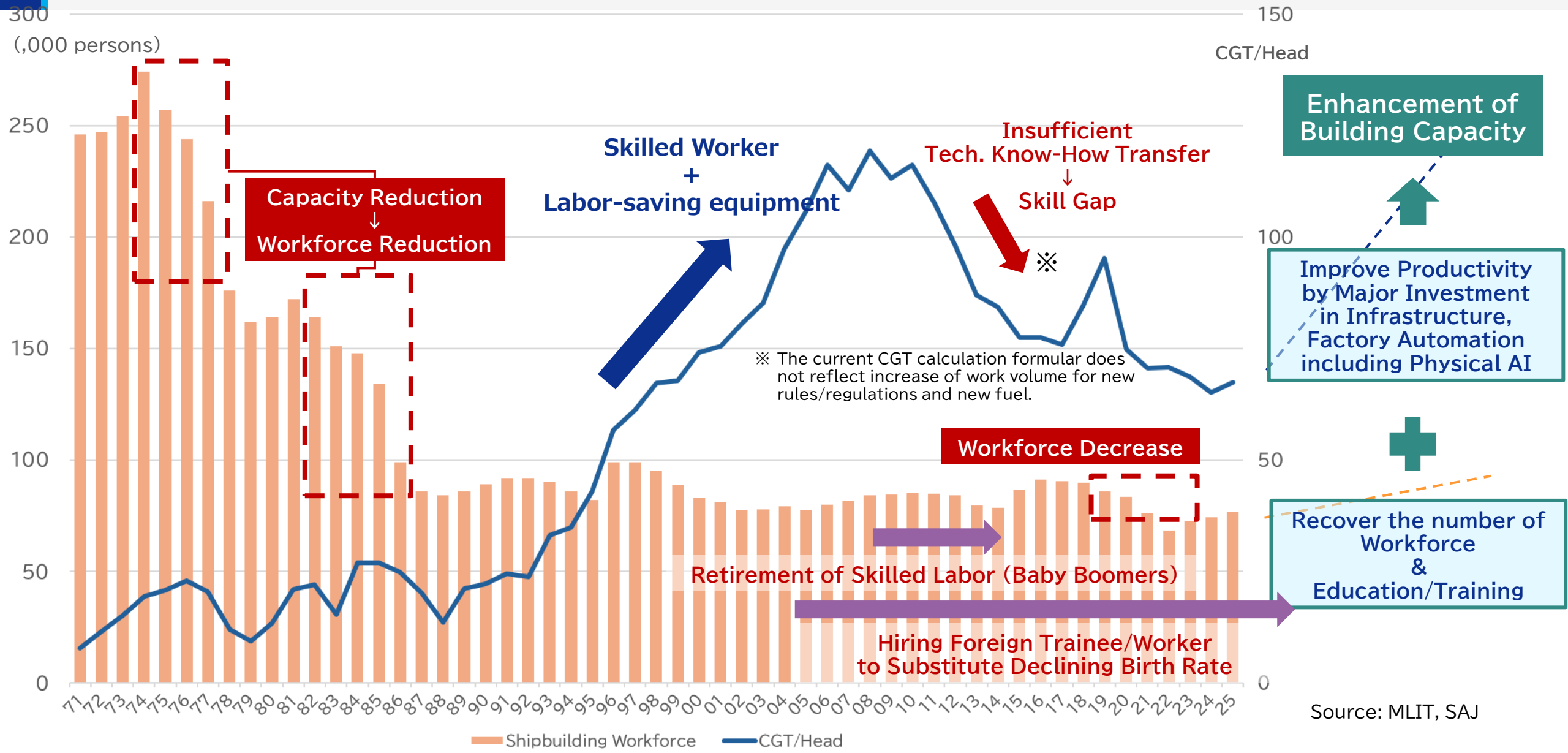


Source: JSEA/S&P Global Market Intelligence

Consolidation/Restructuring of Japan' Shipbuilding Industry



Trends in Shipbuilding Workforce and Productivity in Japan



Enhancement of Building Capacity

Improve Productivity by Major Investment in Infrastructure, Factory Automation including Physical AI

Recover the number of Workforce & Education/Training

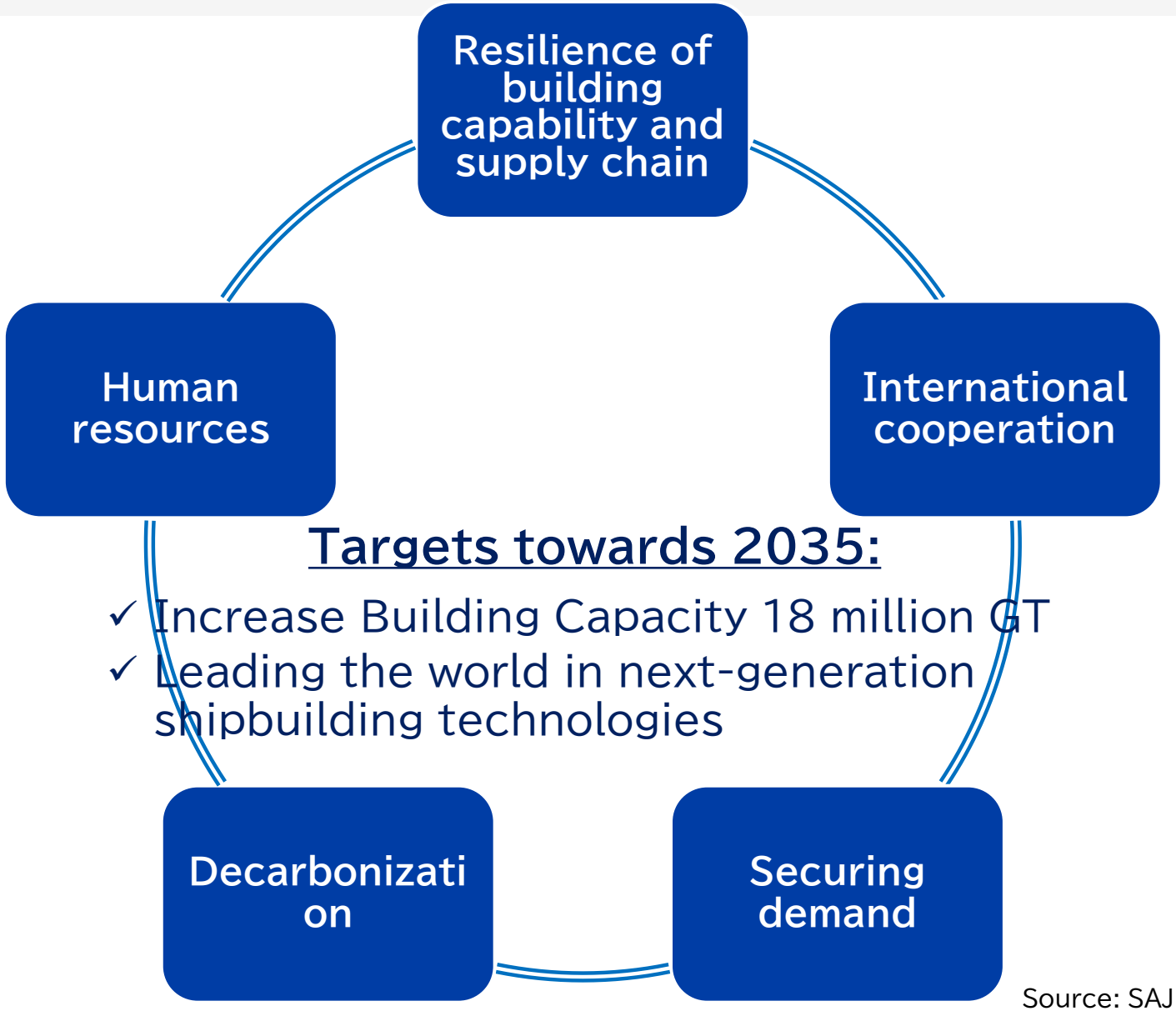
Source: MLIT, SAJ

“Shipbuilding Industry Revitalization Roadmap” formulated in December 2025

Japan’s 17 Strategic Growth Sector

- AI, Semi-Conductors
- Digital, Cyber-security
- ICT
- Quantum Technology
- Defense
- Aerospace
- Ocean & Offshore Technology
- Shipbuilding
- Critical Minerals, Material
- Bio
- Advanced Healthcare
- Resource, Energy, GX
- Fusion Energy
- National Resilience
- Port Logistics
- Food Tech
- Content Industry

Guideline for Revitalisation



Targets towards 2035:

- ✓ Increase Building Capacity 18 million GT
- ✓ Leading the world in next-generation shipbuilding technologies

Source: SAJ

Essential Conditions for Large Scale Expansion Investment

Payback Period may reach approx. 10 years.
We need following positive views;

- Sufficient order backlog
- Robust long-term demand outlook
  - Energy transportation demand
  - Demand for decarbonization-compliant vessels
  - Replacement demand for aging fleets
- Appropriate ship price levels
  - Fair Demand-Supply Balance

In addition, the continued implementation of the government policies is expected.

Development of “Shipbuilding AI”

Set up the Strategic Asset of Shipbuilding Expertise
through the cycle of Knowledge → Decision-Making → Verification → Learning



Actual Shipyard
Human-Physical AI Collaboration

Updating
Knowledge/Know-how
for continuous learning

Work Order
made by Human

Performance &
Operational Status Data

Shipbuilding Knowledge
(Knowledge Graph)

Judge & Decision-Making
By Human

Shipyard Digital Twin

Decision Criteria
& Constraints

Support Decision-making
with Recommendable Action

Current Conditions
& Forecasts

AI Brain (AI Foreman)
To support the judge on schedule, Quality,
worker allocation and etc., on-site



Representative Agents | Production Planning Agent | Schedule Management Agent | Quality Agent | Maintenance Agent | Robotics Agent | Safety Agent