



Evaluation of the Current National Defense Strategy and Defense Buildup Program (Challenges and Future Direction)

August 3, 2026
Ministry of Defense



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1 Current Assessment and Evaluation Criteria

Current Perceptions

- ✓ As a result of initiatives based on the current National Defense Strategy (hereinafter referred to as the “Current Strategy”) and the Defense Buildup Program (hereinafter referred to as “Current Program”) decided by the Cabinet in December 2022, **Japan has made steady progress in strengthening its defense capabilities overall.**
- ✓ On the other hand, **domestic and international developments have evolved more rapidly and in more complex ways than anticipated** when the Current Strategy and Program were formulated, creating **new challenges that require additional measures.**
- ✓ Although one year remains in the current program period, **simply continuing existing efforts may not be sufficient to ensure that deterrence remains credible in the years ahead.** It is therefore necessary to **assess emerging realities with a strong sense of urgency** and identify further actions required.

Evaluation Perspectives

The review assesses **the extent to which changes in the security and strategic environment since December 2022 have affected** the assumptions, objectives, and implementation of the current strategy and program. It also **identifies areas requiring further action** and reflects these findings in the revision of the Three Strategic Documents.



2 Major Achievements



Reinforcement of defense capabilities

(Examples)

- Stand-off Defense Capabilities: deployment of Type-25 surface-to-ship guided missiles, acquisition of Tomahawks, commencement of operation of a satellite constellation
- Integrated Air and Missile Defense Capabilities: construction of Aegis System-Equipped Vessels (ASEVs)
- Unmanned Defense Capabilities: Establishment of Synchronized, Hybrid, Integrated and Enhanced Littoral Defense (SHIELD) with unmanned assets
- Cross-Domain Capabilities: launch of an SDA satellite (scheduled), expansion of the JSDF Cyber Defense Command



The **establishment of the JSDF Joint Operations Command (JJOC)** has enhanced effectiveness of centralized and rapid joint force operations.

Reorganization into the Japan Aerospace Self-Defense Force (scheduled), etc. will reinforce space operations capabilities.



Reorganization of the 15th Brigade into a division (scheduled), etc. will reinforce defense posture in the Southwestern region.



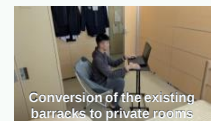
Progress has been made **in expanding ammunition stockpiles, building additional munitions storages , and hardening key facilities.**



The **Act on Enhancing Defense Production and Technology Bases** paves the way for a stable supply of equipment and helps **address long-standing parts shortages. Fast-Track Procurement program has been introduced** to support the rapid introduction of the outstanding technologies of startups and others.



The human resource base has been greatly reinforced through **initiatives for improving the treatment of JSDF personnel. FY2025 saw an increase in new recruits and a decrease in mid-career resignations.**



Through enhancement of Japanese and U.S. command and control, implementation of advanced and more realistic training, etc., **the deterrence and response capabilities of the Japan-U.S. Alliance have been strengthened. Revisions of the Three Principles on Transfer of Defense Equipment and Technology and its Implementation Guidelines** has enabled, in principle, the transfer of all finished products, giving momentum to cooperation in defense production and sustainment with our ally and like-minded countries.



- Japan **has made steady progress** in strengthening its defense capabilities under the current Strategy and Program **overall.**
- However, **additional measures are required** in response to domestic and international developments.

[Reference] Progress in the Reinforcement of Defense Capabilities (As of the End of FY2026)

Increase in existing equipment by the end of FY2026 (examples)*1

| Destroyers

54 ships (4 ships replaced and additional 4 ships)

| Submarines

22 ships (4 ships replaced)

| Fighters (F-35As)

86 aircraft (+32)

| Fighters (F-35Bs)

33 aircraft (+21)

| Transport Aircraft (C-2s)

18 aircraft (+2)*2

| Aerial Refueling and Transport Aircraft (KC-46As)

12 aircraft (+6)

*1 This is the force as of the completion of the FY2026 budget, and the figures in the brackets show the equipment budgeted for during the period of the Current Program.

*2 The number of C-2s excludes one flight test aircraft.

Capabilities newly gained by the end of FY2026 (examples)

| Equipment

- Deployment of indigenous stand-off missiles (Type-25 Surface-to-Ship Guided Missile, Type-25 Hyper Velocity Gliding Projectile)
- Delivery of foreign-made stand-off missiles (Tomahawks, JSMs)
- Acquisition of upgraded, modified Type-03 Medium-Range SAM
- Deployment of an SDA Satellite, SSA Radar, Satellite Jamming Detection Systems, Satellite Laser Ranging
- Deployment of Patrol Vessels (4 ships)
- Deployment of Transport Vessels (LSVs/LCUs/MSVs) (5 ships)
- Expansion of PFI-contracted transport (2 ships → 6 ships)
- Development of a satellite constellation



| Unit Reorganization

● GSDF

- Establishment of 3rd Amphibious Rapid Deployment Regiment (Takematsu) (end of FY2023)
- Establishment of 2nd Artillery Brigade (Yufuin) (end of FY2023)
- Establishment of 7th Surface-to-Ship Missile Regiment (Katsuren) (end of FY2023)
- Reorganization into JGSDF System and Signal/Cyber School (Kurihama) (end of FY2023)
- Establishment of 8th Surface-to-Ship Missile Regiment (Yufuin) (end of FY2024)
- Opening of Camp Saga, relocation of V-22 Ospreys (July 2025)
- Reorganization into Ground Logistics Command (end of FY2025)
- Reorganization into 15th Division (FY2026)

● MSDF

- Establishment of Fleet Surface Force (end of FY2025)
- Establishment of Information Warfare Command (end of FY2025)

● ASDF

- Reorganization into Space Operations Wing (end of FY2025)
- Reorganization into Japan Aerospace Self-Defense Force (FY2026)
- Establishment of Space Operations Command (FY2026)
- Establishment of 202nd Squadron (tentative name) operating F-35Bs (FY2026)

● Joint Units

- Establishment of JSDF Joint Operations Command (Ichigaya) (end of FY2024)
- Establishment of Self-Defense Forces Maritime Transport Group (end of FY2024)



3 Key Developments and Emerging Challenges (Overview)

Changes in the security environment surrounding Japan

China's broad and rapid military buildup

Growing Russia-North Korea military cooperation

Deepening China-Russia Strategic Cooperation

Shifting U.S. Strategic Priorities

International competition in science, technology, and innovation

Challenges requiring further action

Mass employment of unmanned assets

AI-Enabled Decision-Making

Attacks in the space and cyber domains

Rising cost of responding to aerial threats

"New Ways of Warfare"

Need for sustained operational capability

The "defense gap" in Japan's Pacific side

Need for cooperation with like-minded countries

Intensifying competition for human resources

Inflation, Exchange-Rate Volatility, and Rising Interest Rates increases

Socioeconomic Changes

Transformation of defense capabilities through revision of "the Three Documents"

● Expanded employment of unmanned assets

● Enhancing decision-making through AI implementation

● Enhancement of space and cyber capabilities

● Enhancement of air defense and counterstrike effectiveness

● Enhancement of sustained operational capability

● Reinforcement of defense posture on Japan's Pacific side

● Reinforcement of joint deterrence and response capabilities of the Japan-U.S. Alliance

More Effective Cooperation with like-minded countries and others

● Reinforcement of defense production base

● Improving the treatment of JSDF personnel

Expanded use of unmanned technologies, automation, and labor-saving measures

4 Changes in the Security Environment Since the Adoption of the Current Strategy

- **Challenges to the free and open international order** based on the rule of law **are becoming increasingly severe**, contributing to growing instability in the international system.
- **China is extensively and rapidly building up its military**, and is rapidly expanding and intensifying its activities, including in the Pacific Ocean.
- **China/Russia and Russia/North Korea military cooperation** has advanced substantially.
- **U.S. priorities toward global challenges have evolved.** It has increasingly called on its allies and partners to assume a greater share of defense responsibilities.
- Based on the perception that **cutting-edge science, technology, and innovation** are the keys to ensuring their security, each country is strategically enhancing investments.

China

Growth in defense and related expenditures since the formulation of the Current Strategy (FY2022)

China

Approx. **15.4 trillion yen**
(Approx. 459 billion RMB)

Japan

Approx **3.6 trillion yen**

Approx. **269.133 billion USD**
(Approx. 1.909 trillion RMB;
Approx. 40.100 trillion yen)

Japan's defense-related
Budget for JFY2026 is:
Approx. **59.1 billion USD**
(Approx. 8.8 trillion yen)

Level of 10 years ago
(currently about twice as much)

Level of 20 years ago
(currently about 7 times higher)

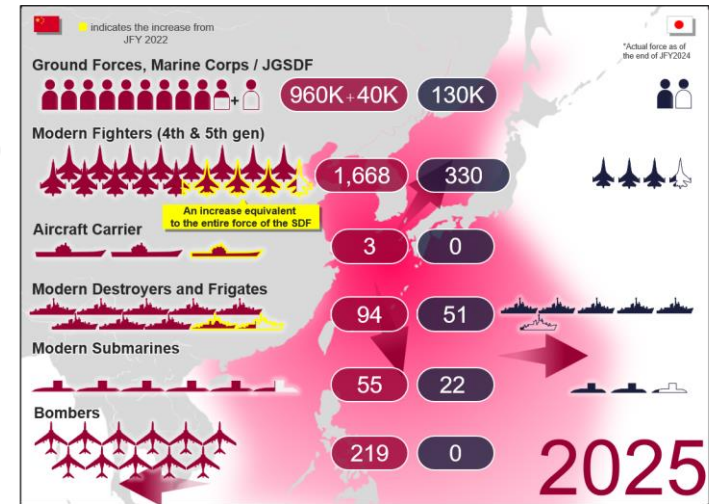
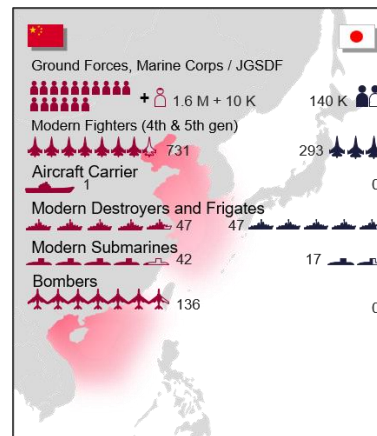
Level of 30 years ago
(currently about 27 times higher)

Formulation of three strategic documents

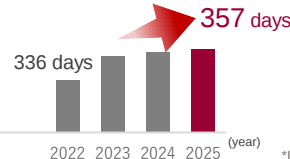
(Note) "China's Defense Spending" refers to the amount of the "national defense budget" within the "central general public budget expenditure" (called "central fiscal expenditure" before 2014). "Growth rate" refers to the rate compared to the initial budget of the previous fiscal year. For FY2016 and FY2018-FY2026, only the national defense budget within the "central principal-level expenditure," which is part of the "central general public budget expenditure," was published; therefore, those figures are used as "national defense expenditure."

*1 Japan's defense-related expenditure (budget: approx. ¥8.8 trillion) excludes costs related to SACO, costs related to U.S. force realignment that pertain to local burden reduction, and similar expenses.

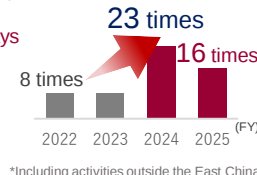
*2 Yen conversion is calculated using the disbursing officer's rate for each fiscal year. Year-on-year figures are based on China's published values.



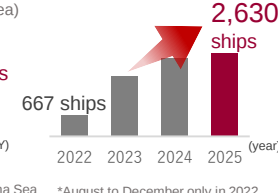
Annual number of **China Coast Guard** vessel entries into contiguous zones



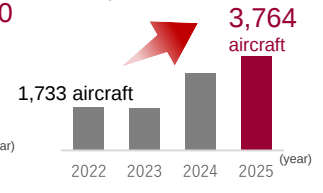
Number of Announcements of **UAV operations** (including operations outside of East China Sea)



Chinese naval vessels confirmed near Taiwan



Chinese military aircraft intruding into airspace around Taiwan



- Against the backdrop of a significant increase in defense spending, **China is rapidly and extensively strengthening its military power** centered on naval, air, nuclear and missile forces.
- **It is rapidly expanding and intensifying its activities** in maritime and air domains around Japan, including its aircraft carriers operations **east of Iwo-To** (June 2025), intensified activities, including **large-scale military exercises around Taiwan** (2022 onward), frequent operations of **UAVs on the Pacific side** (since 2021), etc.

4 Changes in the Security Environment After Formulation of the Current Strategies

Growing Russia-North Korea Military Cooperation

- Amid the ongoing invasion of Ukraine, **North Korea is rapidly advancing military cooperation with Russia.**

Supply of Weapons and Ammunition

- ✓ Ukraine claims that **about half of the ammunition used by Russia is manufactured in North Korea.** At least 100 ballistic missiles were supplied during 2024. There are concerns that combat use will lead to **further performance improvements of NK-made missiles.**
- ✓ Chairman Kim Jong-un has mentioned the further expansion of missile production capabilities. There is a risk that **this could lead to development of North Korea's ballistic missile forces going forward.**



Dispatch of Soldiers

- ✓ In late 2024, more than 11,000 **soldiers were sent to Russia.** From January to March 2025, an additional 3,000 soldiers were dispatched.
- ✓ Through combat with Ukrainian forces **North Korea has gained first-hand experience of "new ways of warfare,"** including the employment of unmanned assets.



Source: MSMT First Report, etc.

North Korea's Military Buildup

- In addition to its **nuclear and missile forces**, North Korea **is also focusing its efforts on building up its conventional forces.**

Development of
"hypersonic missiles"

Development of **solid fuel ICBMs**

Development of **one-way attack UAV**

Commissioning of a **new-type destroyer**

Number of **nuclear warheads up approx. 3x**
from 2022 → 2026
(Approx. 20) (Approx. 60)

Source: SIPRI Yearbook

Strengthening of China–Russia Strategic Coordination

- Through **various exercises, joint flights of bombers, and joint navigation of naval vessels**, China and Russia are strengthening their strategic coordination.
- It has been pointed out that China is **supporting Russia's aggression against Ukraine** by sending dual-use items

Continuing **reciprocal participation in military exercises.**

(Illustration shows the September 2024 example of "Northern United-2024.")

Area of Activity
(for illustration purposes)

The scope of the drills in the **Naval Joint Exercise "Maritime Cooperation"** has been **expanding and deepening year by year.**

(Recent examples include exercises in the South China Sea in 2024 and in the Sea of Japan in 2025. Illustration shows the 2025 example.)

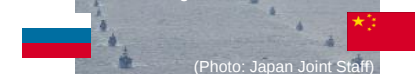
Joint bomber flights have been conducted **once or twice annually.** In June 2026, Chinese bombers and Russian bombers conducted **a long-distance joint flight over the Sea of Japan, the East China Sea and the Pacific Ocean.** (Illustration shows the 2025 and 2026 examples.)



Joint navigation has been conducted annually, with expanded areas of activity.

(Illustration shows examples from 2021, 2023, and 2026)

Joint navigation in October 2021



(Photo: Japan Joint Staff)

Military Buildup in Russia's Far East

- Even as Russia's aggression against Ukraine continues, Russia **is continuing military build-up in the Far East, including the Northern Territories, which are inherent territories of Japan.** Upgrades to new military equipment are progressing.

Expansion of **strategic nuclear submarines forces***
(2022: 3 vessels → 2026: 5 vessels)

*Borei/Borei A-class

Bomber flights escorted by fighter aircraft are confirmed around Japan every year

5 Major Challenges (1/7)

Mass employment of unmanned assets

- ✓ In Russia's aggression against Ukraine and in the situation across the Middle East, combined attacks employing unmanned assets and missiles, and the expanding roles of unmanned systems in reconnaissance, logistics, and communications, have **fundamentally transformed the character of combat**.
- ✓ It is necessary to **field large numbers of diverse unmanned assets**, **integrate them with conventional platforms**, and operate them flexibly in accordance with mission requirements and battlefield conditions.

Drone production in both Russia and Ukraine is reportedly **measured in the millions** of units annually.



(Photos: Main Directorate of Intelligence of the Ministry of Defence of Ukraine)

"We [the U.S. Army] expect to purchase at least a million drones within the next two to three years."

Source: Statement by Secretary of the Army Driscoll in a telephone interview with Reuters (November 8, 2025)

Countries are actively developing **swarm** technologies for unmanned systems.

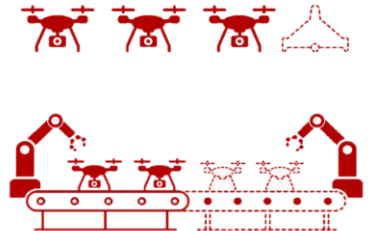


Illustration (created by generative AI)



Current Situation in Japan

- ✓ Japan's current unmanned systems are **primarily short-range and for ISR use**. **We have not yet begun acquiring strike UAVs** designed to operate in combination with stand-off missiles.
- ✓ Even after completion of the Synchronized, Hybrid, Integrated and Enhanced Littoral Defense (SHIELD) initiative currently under development, the overall inventory of unmanned assets is expected to **remain limited to several thousand platforms**.
- ✓ **Efforts to establish mass-production capacity for unmanned** including dual-use assets, in anticipation of contingencies, **is in the early stages**.



As unmanned systems dramatically transform the nature of combat, Japan's efforts have only just begun. **Rapid reinforcement of Japan's initiatives, including the establishment of a production base, is necessary.**

5 Major Challenges (2/7)

AI-enabled decision-making/Attacks on space and cybersystems

- ✓ Countries are accelerating the development and fielding of **AI-enabled decision support systems**.
- ✓ By integrating data across domains and leveraging AI, **the speed and accuracy of decision-making can be dramatically improved.**

“We [U.S. Forces] will become an “AI-first” warfighting force across all domains.”

Source: Statement by Secretary of War Hegseth concerning the AI Acceleration Strategy to Secure American Military AI Dominance (January 12, 2026)

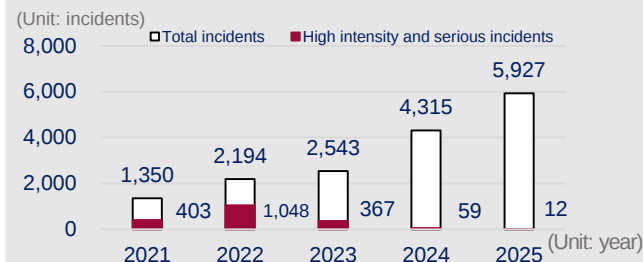
“(In the U.S. Forces) NGA Maven has decreased targeting workflow timelines from hours to minutes from sensing to target engagement.”

*The U.S. AI program that constitutes the core AI models and infrastructure, etc. of Palantir’s Maven Smart System
Source: Testimony of the Director of the National Geospatial-Intelligence Agency (NGA) before the House Armed Services Committee (May 14, 2025)



- ✓ Space assets, including commercial satellites, have become indispensable to military command and control and intelligence. Some nations are intensifying efforts to **degrade, disrupt, or disable the satellites of other countries.**
- ✓ The trend is that **Cyberattacks could precede conventional military operations**, with **critical infrastructure and communication networks, including satellites, becoming targets.**

Number of Cyberattacks Identified by the Ukrainian Authorities



Current Situation in Japan

- ✓ Compared to the United States and some other countries, **AI adoption and utilization** by the Ministry of Defense and SDF **is still in the early stages, requiring fundamental reinforcement.**
- ✓ There is a challenge in developing **communication networks and clouds** to integrate all data and process it quickly and stably.
- ✓ Challenges remain in ensuring mission assurance in space, including space domain awareness and satellite protection as well as **defending against multiple simultaneous and high-intensity cyberattacks.**



There is a risk that Japan may fall behind potential adversaries in the speed and precision of decision-making, and capability gaps may also emerge in Japan-U.S. cooperation.

5 Major Challenges (3/7)

Rising cost of responding to aerial threats

- ✓ In addition to ballistic and cruise missiles, countries are **increasing their inventories of hypersonic weapons**, which are particularly difficult to intercept.
- ✓ At the same time, they are **expanding their inventories of diverse unmanned assets, including long-range assets**. This enables saturation attacks in which low-cost unmanned systems are used to exhaust air defense interceptors while ballistic and other missiles are employed simultaneously, **imposing disproportionate costs on the defender**.

Growing missiles and unmanned assets inventories in neighboring countries

- **China** has more than **3,000** ballistic missiles*



- **North Korea** has 700 to 1,000 ballistic missiles
 - **Russia** has various types of missiles, including approx. 350 ICBMs
- Source: JANES

Source: Materials published by the U.S. Defense Intelligence Agency (May 2025)



GJ-2 (reconnaissance/offensive unmanned aircraft)

Development of **drone mother ship-type UAV** (reported capability to transport large numbers of small drones)



Saetbyol-9 (offensive unmanned aircraft)



one-way unmanned aircraft

Attacker-defender cost comparison



VS



(Ex.) Shahed 136: **Approx. 35,000 dollars**

Approx. 140x difference

(Ex.) SM-2/6: **Approx. 4.3 million dollars**

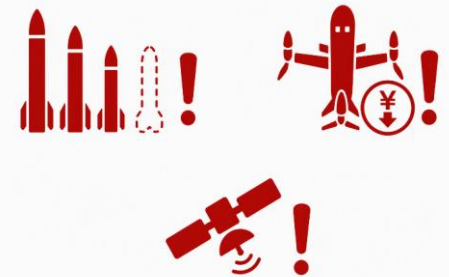
(Ex.) PATRIOT: **Approx. 4.9 million dollars**

Source: Center for Strategic & International Studies (CSIS), Calculating the Cost-Effectiveness of Russia's Drone Strikes (February 19, 2025) and The War May Be Ending, What Did Epic Fury Cost? (June 23, 2026)



Current Situation in Japan

- ✓ Japan has commenced deployment of indigenous stand-off missiles that can serve as counterstrike capabilities, but it is necessary to **secure sufficient missile inventories to ensure their effectiveness as credible deterrence and response capabilities**. Japan is still in the process of developing advanced missiles, including hypersonic guided missiles, etc.
- ✓ **The satellite-enabled intelligence and command and control capabilities** which are necessary for the effective employment of stand-off defense capabilities, also remain **limited at present**.
- ✓ In addition to ensuring sufficient quantities of air defense interceptors, Japan must develop interceptor drones and other **cost-effective air and missile defense solutions**, expand the use of decoys and deception measures, and further strengthen concealment and dispersion.



Unless Japan can strengthen both the quantity and quality of its counterstrike and air defense capabilities, its **ability to sustain credible deterrence and response capabilities may be undermined in the future**.

5 Major Challenges (4/7)

The “defense gap” in Japan’s Pacific side

- ✓ **China has steadily expanded its capability to conduct operations at greater distances in maritime and air domains.** The frequency and geographic scope of activities by aircraft carriers and other vessels has expanded.
- ✓ **Russia has deployed bombers into the Pacific side together with China.**



(Photo: Japan Joint Staff)
Aircraft carrier Liaoning (China)

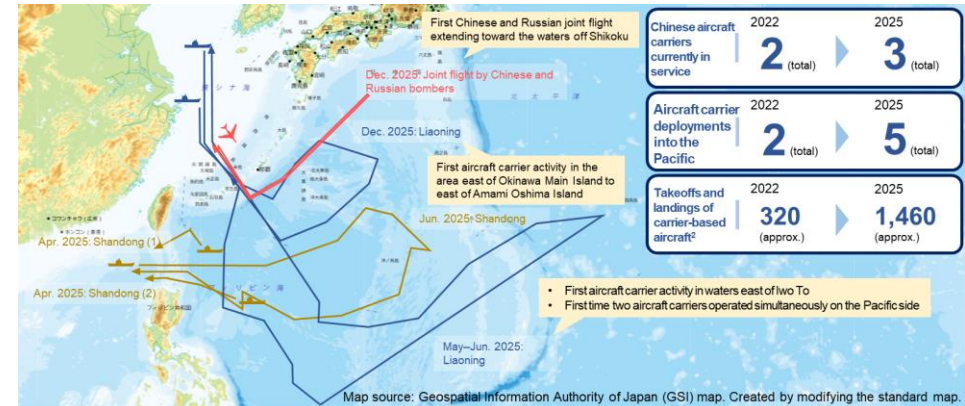


(Photo: Japan Joint Staff)
Tu-95 bomber (Russia)



(Photo: Japan Joint Staff)
H-6 bomber (China)

Activities of Chinese aircraft carriers and Chinese/Russian bombers in the Pacific (2025)¹



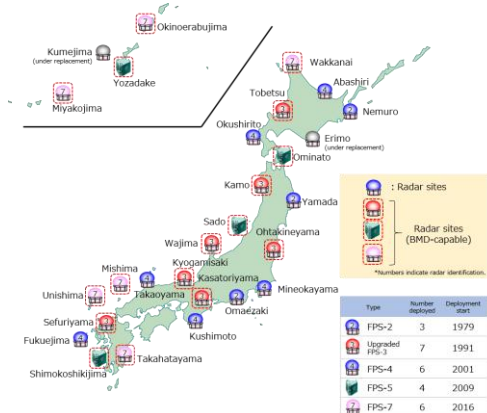
1. The activity overview is based on Joint Staff press releases. Some details have been simplified in the preparation process.
2. Total number of carrier-based aircraft takeoffs and landings in the Pacific as reported in Joint Staff press releases.



Current Situation in Japan

- ✓ **Persistent airspace surveillance capabilities over the Pacific Ocean remain insufficient**, limiting Japan's ability to collect information and maintain effective early warning and surveillance.
- ✓ Developing capabilities and operational for the **defense of sea lanes** is an urgent requirement for ensuring sustained operational capability.

Locations of ASDF radar sites

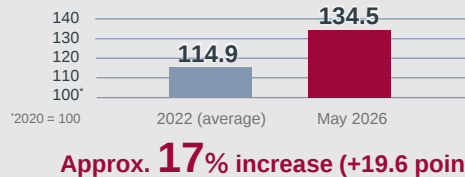


In a contingency, **gaps in Japan's Pacific defense posture could be exploited by an adversary.**

5 Major Challenges (5/7)

The impact of inflation and exchange rate fluctuations

Domestic Corporate Goods Price Index



Source: Bank of Japan website, List of Releases of Corporate Goods Price Index (CGPI) and BOJ Time-Series Data Search

Disbursing officer's rate and USD/JPY exchange rate

The main dollar-yen rate used when the Current Program was formulated (FY2022)

USD/JPY exchange rate in July 2026

108 yen → **157 to 163 yen level**

(Reference: the dollar-yen rate in 2022 was at the 113 to 151 yen level)

Persistent depreciation of the yen

Examples of rising defense equipment acquisition cost



SH-60Ls

FY2023 budget: **10.1** billion yen (aircraft)
→ FY2026 budget: **14.3** billion yen (aircraft)
(+Approx. **42%**)



P-1s

FY2023 budget: **30.5** billion yen (aircraft)
→ FY2026 budget: **46** billion yen (aircraft)
(+Approx. **50%**)



OPVs

FY2023 budget: **8.9** billion yen (ships)
→ FY2026 budget: **14.3** billion yen (ships)
(+Approx. **60%**)



F-35Bs

FY2023 budget: **17.9** billion yen (aircraft)
→ FY2026 budget: **24.2** billion yen (aircraft)
(+Approx. **35%**)



UH-2s

FY2023 budget: **2.8** billion yen (aircraft)
→ FY2026 budget: **4.64** billion yen (aircraft)
(+Approx. **66%**)



AMVs

FY2023 budget: **520** million yen (aircraft)
→ FY2026 budget: **740** million yen (aircraft)
(+Approx. **42%**)

*Factors contributing to rising acquisition prices include enhanced capabilities and changes in specifications.

- Since the adoption of the Current Program, **inflation and exchange rate fluctuations have continued.**
- Through efficiency and rationalization initiatives, at present defense capability enhancement efforts have generally remained on track.
- **Procurement in certain areas has been affected** by **rising procurement costs** for defense equipment and by the implementation of projects that were not envisaged when the Program was formulated.

5 Major Challenges (6/7)

Need for sustained operational capability

- ✓ Russia's aggression against Ukraine has continued for more than four years.
- ✓ Recent U.S. operations against Iran also demonstrated the **rapid consumption of large quantities of munitions**.
- ✓ **Sustained operational capability** is essential to maintaining credible deterrence, a critical element for the **credibility of deterrence**.



Illustration (created by generative AI)

Number of ammunition used by the United States in its operations against Iran

*Over 39 days from the start of the war

Ammunition	Number used
Tomahawk	More than 1,000
THAAD	190 to 290
PATRIOT	1,060 to 1,430
SM-3	130 to 250
SM-6	190 to 370
JASSM	More than 1,100

Large quantities of ammunition used in a short time

Source: Center for Strategic & International Studies (CSIS), Rebuilding U.S. Missile Inventory: A Multiyear Project (May 27, 2026)



Current Situation in Japan

- ✓ Within the defense industry, **some companies have withdrawn from defense-related businesses** due to low profitability, lack of predictability, reputation risk, etc.

Examples of business withdrawal since the adoption of the Current Strategy

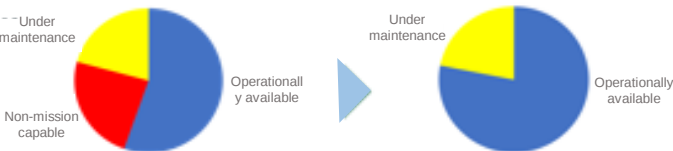
Company	A Corporation Business withdrawal* (2026)	B Corporation Business withdrawal* (2024)
Product	Aircraft parts (Main landing gear brake wheels, etc.)	Aircraft equipment (Rotary wing aircraft seats, etc.)
Reason	Due to a decline in the department's profit margin	Due to a decline in the department's profit margin
Response	Transferred the business to another company	Transferred the business to another company

*Fiscal year in which manufacturing was transferred to a successor company

- ✓ Regarding the operational availability of equipment, the Current Program aims to resolve non-mission capable status* caused by parts shortages by JFY2027.

* Equipment that should otherwise be operational but remains non-mission capable because the necessary parts cannot be secured.

(Illustration)



- ✓ Operational availability is improving through parts deliveries under measures in the Current Program. **For most equipment, non-mission capable status caused by parts shortages is expected to be resolved during the program period.**
- ✓ On the other hand, for **some equipment**, primarily aircraft, **equipment rendered non-mission capable due to parts shortages is not expected to be eliminated** within the program period as the lead time for parts acquisition grows longer due to suddenly occurring factors such as companies withdrawing from defense-related businesses, discontinuation of parts production, and unexpected defects.

Operational availability has improved overall; however, emerging supply-chain risks, including business withdrawals and disruptions arising from the international environment, are **affecting the operational availability of certain equipment**. As these challenges persist even in peacetime, **strengthening sustained operational capability for contingencies has become increasingly important**.

[Reference] Progress of the Current Defense Buildup Program Appendix Table 2

Classification	Equipment Type	Procurement Quantity (2023 to 2027)	Quantity Procured FY2023-2026				Cumulative quantity	Remaining quantity
			FY2023	FY2024	FY2025	FY2026		
Stand-off Defense Capabilities	Upgraded Type-12 surface-to-ship guided missile (Surface-type)	11 Units	1 Unit	2 Units	2 Units	3 Units	8 Units	3 Units
Integrated Air and Missile Defense Capabilities	Type 03 Medium-Range Surface-to-Air Missile (modified) (upgraded)	14 Units				13 Units*	13 Units	1 Unit
	Aegis System-Equipped Vessels	2 ships		2 ships			2 ships	0 ships
	Airborne Early Warning Aircraft (E-2D)	5 aircraft	5 aircraft				5 aircraft	0 aircraft
Cross-Domain Capabilities	Destroyer	12 ships	2 ships	2 ships	3 ships	1 ship	8 ships	4 ships
	Submarine	5 ships	1 ship	1 ship	1 ship	1 ship	4 ships	1 ship
	Patrol Vessel	10 ships	4 ships			2 ships	6 ships	4 ships
	Fixed-wing Patrol Aircraft (P-1)	19 aircraft	3 aircraft	3 aircraft	2 aircraft	1 aircraft	9 aircraft	10 aircraft
	Fighter (F-35A)	40 aircraft	8 aircraft	8 aircraft	8 aircraft	8 aircraft	32 aircraft	8 aircraft
	Fighter (F-35B)	25 aircraft	8 aircraft	7 aircraft	3 aircraft	3 aircraft	21 aircraft	4 aircraft
	Fighter (F-15 Upgraded)	54 aircraft	18 aircraft				18 aircraft	36 aircraft
	Stand-off Electronic Warfare Aircraft	1 aircraft					0 aircraft	1 aircraft
	Network Electronic Warfare System (NEWS)	2 Types		1 Type	1 Type		2 Types	0 Types
Command and Control/Intelligence-related Functions	Signals Intelligence Aircraft (RC-2)	3 aircraft		1 aircraft	1 aircraft	1 aircraft	3 aircraft	0 aircraft
Mobile Deployment Capabilities and Civil Protection	Transport Vessels	8 ships	2 ships	3 ships	3 ships		8 ships	0 ships
	Transport Aircraft (C-2)	6 aircraft	2 aircraft				2 aircraft	4 aircraft
	Aerial Refueling and Transport Aircraft (KC-46A, etc.)	13 aircraft			4 aircraft	2 aircraft	6 aircraft	7 aircraft
	KC-46A	9 aircraft			4 aircraft	2 aircraft	6 aircraft	3 aircraft
	New Aerial Refueling and Transport Aircraft	4 aircraft					0 aircraft	4 aircraft

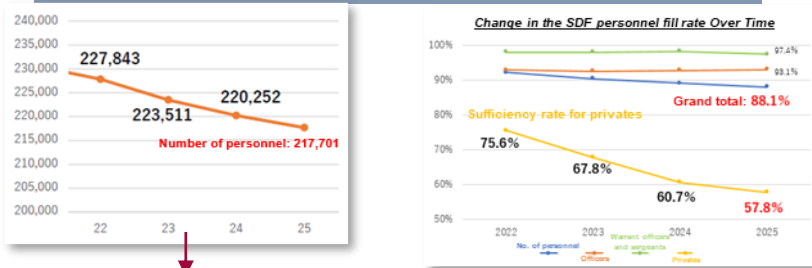
*Including the acquisition of two Type 03 Medium-Range Surface-to-Air Missiles (modified) which are scheduled to be upgraded in the future.

5 Major Challenges (7/7)

Intensifying competition for human resources

- ✓ Amid a nationwide labor shortage driven by demographic decline, economic growth has **further intensified the competition for human resources, giving the private sector an advantage**. In particular, competition for high school graduates has become intense, having an impact on the recruitment for JSDF Candidates and General NCO Candidates.
- ✓ Due to the effect of improving the treatment, etc., **FY2025 saw an increase in new recruits and a decrease in mid-career resignations**, but the **number of SDF personnel continues to decrease**.

Change in the number of JSDF personnel



Compared to FY2022 (when the Current Program was formulated), the number of SDF personnel **has declined by approx. 10,000 people**.



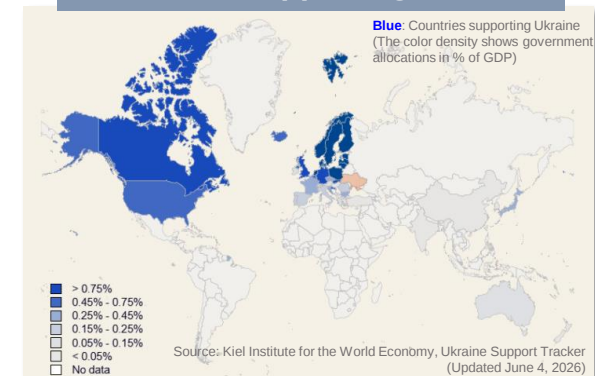
A simple projection indicates that the number could decline to approx. 180,000 in 2035 and **approx. 130,000** in 2045. (Down Approx. 40,000*)
 (Down Approx. 90,000*)
*Compared to FY2024

The number of JSDF personnel continues to decline. Over the medium to long term, maintaining the current force structure will become increasingly difficult.

Need for cooperation with like-minded countries

- ✓ Russia's invasion of Ukraine has underscored the importance of **support from like-minded countries, including the provision of military equipment as well as intelligence and education/training**, for sustaining defense operations.

Countries supporting Ukraine



The **supply of large quantities of equipment** to Ukraine by Western countries **is reinforcing** the operational capabilities and **sustained operational capabilities** of the Ukrainian military.



- ✓ Japan has **advanced peacetime cooperation with like-minded countries to a considerable extent** under institutional frameworks that support defense cooperation and exchanges (ACSAs, RAAs, General Security of Information Agreements, Agreements concerning the Transfer of Defense Equipment and Technology, etc.)
 - ✓ On the other hand, it is necessary to build relationships that ensure effective cooperation in all situations; for example, **consultations and cooperation in contingencies**.
- More effective and practical forms of cooperation remain under development.**

5 Major Challenges (Summary)



In addition to the military buildup of neighboring countries, the growing use of low-cost unmanned systems is creating a cost imbalance between attackers and defenders, making it **increasingly difficult to respond effectively to air and missile threats**.



AI-enabled decision-making has become increasingly important, but **AI adoption and integration within the MOD and JSDF remain at an early stage, requiring substantial reinforcement**.



Surrounding countries are intensifying military activities in the Pacific, while **defense gaps remain along Japan's Pacific flank**.



Inflation and exchange-rate volatility have persisted. Through efficiency and rationalization measures, defense capability enhancement efforts have generally remained on track. However, **procurement in certain areas has been affected by rising procurement costs for defense equipment** and by the implementation of projects that were not envisaged when the Program was formulated.



Operational availability has improved overall; however, emerging supply-chain risks, including business withdrawals and disruptions arising from the international environment, **continue to affect the operational availability of certain equipment**. As these challenges persist even in peacetime, strengthening **sustained operational capability** for contingencies has become increasingly important.



Although improvements in personnel treatment have contributed to an increase in new recruits and a decline in mid-career resignations, the number of JSDF personnel continues to decline. **Over the medium to long term, maintaining the current force structure will become increasingly difficult**.



More effective forms of cooperation with like-minded **countries remain under development**.



Domestic and international developments have evolved more rapidly and in more complex ways than anticipated, creating **new challenges that require additional measures**.

6 Future Direction



Through **the fielding of unmanned systems** and **the introduction of cost-effective air and missile defense solutions**, Japan will significantly strengthen its **asymmetric defense capabilities**, enabling it to respond effectively even against an adversary with a quantitative advantage. Japan will enhance **the effectiveness of its counterstrike capabilities** through quantitative and qualitative improvements to its **stand-off missile capabilities**, diversification of launch platforms, and the introduction of **strike UAVs**.



Based on a resilient, and high-speed communications infrastructure, Japan will **integrate data across domains, including space, cyber, and the electromagnetic spectrum**, and leverage **AI-enabled decision support** to **enhance the speed and accuracy of decision-making**.



Japan will **reinforce its surveillance, intelligence collection, and air and missile defense capabilities along its Pacific coast**, strengthen its capabilities for **sea-lane defense**, which is indispensable to sustaining the lives and livelihoods of the Japanese people, and deepen cooperation with its ally and like-minded partners in securing those sea lanes.



Japan will strengthen its defense industrial base through **the utilization of GOCO arrangements** and **enhanced support for industry under the Act on Enhancing Defense Production and Technology Bases**, thereby enhancing sustained operational capability during prolonged contingencies.



Building on the progress already made in improving operational availability, Japan will further improve operational availability and focus on **securing inventories of spare parts** in order to strengthen its sustained operational capability. It will also reinforce measures to address the discontinuation of parts production and **maintain supply chains**.



Japan will continue efforts to **improve the treatment of SDF personnel** while advancing **the integrated implementation of unmanned systems, automation, labor-saving measures, organizational optimization, and the utilization of private-sector capabilities**.



Through **strengthening the joint deterrence and response capabilities of the Japan-U.S. Alliance**, Japan will further enhance the Alliance's effectiveness in both peacetime and contingencies. Japan will deepen **interconnectedness with allies and like-minded partners** across training, operations, equipment, and the defense industrial base, thereby strengthening regional deterrence and building a foundation for **effective coordination and cooperation during contingencies**.



- Japan will **transform its defense capabilities** through the revision of the Three Strategic Documents, **adopt new approaches to defense**, and significantly strengthen its deterrence and response capabilities.
- Japan will renew Defense Buildup Program **based on the capabilities and resources necessary to safeguard its independence and peace**, and will secure the financial resources required for its implementation **while maintaining public understanding and support**.