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**Department of Agriculture,**  
**Fisheries and Forestry**

**Australia**

**COMPARISON OF CCSBT CATCH DATA WITH JAPANESE AUCTION SALES OF FROZEN SBT**

**ABSTRACT**

As noted in the paper tabled by Australia at the CCSBT Scientific Committee meeting held in Taipei from 29 August to 8 September 2005, Australia has been working with CCSBT members to better understand the Japanese frozen southern bluefin tuna market.

**Based on publicly available auction market data**, in the last three years auction sales of frozen SBT in Japan appear to greatly exceed the quantity expected from CCSBT catch data. Estimates suggest that in 2004, 2003 and 2002, auction sales of frozen SBT were in the order of 8,696 – 11,260 Metric Tonnes HIGHER than should be expected.

Members will note from this revised market analysis, that some of the initial figures contained in the paper have been refined. However, these changes have had little impact upon the apparent oversupply of frozen SBT on the Japanese auction markets.

Given the ramifications for potential over catch of SBT that the market analysis purports, Australia recommends that the CCSBT Secretariat engages individual experts to further analyse the Japanese market system and determine the level of any SBT over catch being marketed through world tuna markets. Furthermore the independent experts should make recommendations to the CCSBT for ways to overcome this apparent over catch through market and other measures and report back to the CCSBT within the next 6 months.

## CCSBT漁獲データと日本の冷凍SBTの競り販売の比較

### 要旨

2005年8月29日から9月8日まで台北にて開催されたCCSBT科学委員会において、オーストラリアが上程した文書に記述されている通り、オーストラリアはCCSBT加盟国と共に、日本の冷凍 ナミマグロ市場の理解を深める努力を行ってきている。

公けに提供されている競り市場のデータによると、過去3年間の日本における冷凍SBTの競り販売量は、CCSBTの漁獲データから予想される数量を大幅に上回っていると見受けられる。推定では、2004年、2003年ならびに2002年の冷凍SBTの競り販売量は、予想よりも8696-11260トン程度高い。

メンバーはこの修正された市場分析により、元の文書に含まれていた多くの数値が精査されたことに気がつくであろう。しかし、これらの変更は、日本市場に供給された冷凍SBTの過剰供給の明らかな差異に影響を及ぼしていない。

市場分析が示すSBTの超過漁獲の可能性が引き起こす影響に鑑み、オーストラリアはCCSBT事務局が個別の専門家を雇い、日本市場をさらに分析し、世界のマグロ市場を通じて販売されているSBTの超過漁獲のレベルを把握することを勧告する。これらの個別の専門家はさらに、市場やその他の措置を通じてこの明らかな超過漁獲を克服する方法について、今後6ヶ月以内にCCSBTに勧告、報告するものとする。

## ISSUES

Australia presented a working paper at the Extended Scientific Committee (ESC) meeting in September 2005 advising that a range of publicly available market data suggested that auction sales of frozen SBT in Japan appear to greatly exceed the quantity expected from CCSBT catch data.

Australia believes that these results require careful consideration within the CCSBT process. If catches of SBT are considerably larger than the recorded catch then this may have a substantial impact on:

- fishery-dependent stock status advice (including advice derived from CPUE and catch at age);
- anticipated recovery trajectories under a Management Procedure and the short term risks under different Candidate Management Procedures; and
- the data collection requirements for implementation of a Management Procedure (i.e. the ability of current catch and effort data collection systems to support the effective operation of the MP would be called into question).

At the ESC Japan noted that Australia provided its estimate to Japan only seven working days before the SAG6 meeting, and that Japan had not had time to check the information presented.

**NOTE: This is not a bi-lateral issue and no blame has been attributed by Australia for the catch of these fish although it should be noted they are longline caught fish.**

Australia has continued to refine the market information since the ESC for CCSBT 12. The attached Technical Paper (Attachment 1) provides the calculations and results of comparing frozen SBT sold on Japanese markets and the amount of frozen SBT that could have been expected from CCSBT catch reports for 2004. Annex 7 shows the estimated over catch in frozen SBT being sold in Japan's markets (Whole Weight) for 2002, 2003 and 2004 using two different assumptions for the percentage of frozen SBT sold at auction:

1. Given frozen wild caught SBT Auction sales are 50% of total frozen wild caught sales
2. Given frozen wild caught SBT Auction sales are 75% of total frozen wild caught sales

The data used in this analysis has been cited where applicable and apart from the Japanese Charter arrangements with New Zealand is freely available to the general public. Other sources of information to support the assessment of the actual levels of overcatch has been gathered from the Japanese Government (Customs and the Ministry of Agriculture and Fisheries) and the Tokyo Metropolitan Government and Japanese, New Zealand and Australian seafood industries. We believe that their advice is accurate and we have gathered evidence in all cases from a number of corroborating sources.

Australia first raised this issue with Japan to seek support in better understanding the problem. In response Australia now finds itself accused of over-catching its SBT quota. Given that Australia has not made accusations against anyone else it is

disappointed at best by this reaction and is now more determined than ever to have the issue resolved. Australia would welcome as part of a broader review of the market analysis a full review by the external scientists of its procedures to monitor the catch at Port Lincoln and if practical recommendations are made for changes we are prepared to implement them to improve both transparency and accuracy. We expect no less from any other country.

## **DISCUSSION**

The SBT fishery should have recovered under the reductions put in place in the late 1980's however this has not happened and countries need to ask why. On all Australian analysis there appears to be serious discrepancies between the catch of SBT reported to the CCSBT and records of SBT being sold through the Japanese fisheries auction system. Australia believes that Illegal, Unreported, and Unregulated (IUU) fishing is occurring in the SBT fishery and that these IUU caught fish explain the discrepancy between declared catch and auction sales.

### Australia **RECOMMENDS**:

- That the Commission immediately convenes a group of individual experts to further analyse the Japanese market system and determine the level of any SBT over catch being marketed through world tuna markets. Furthermore the independent experts should make recommendations to the CCSBT for ways to overcome this apparent over catch through market and other measures and report back to the CCSBT within the next 6 months
- All members should immediately implement measures that will deter and prevent the capture and marketing of IUU SBT.

These actions must occur as a matter of priority. This fishery took substantial cuts to catch limits in 1989. The question that we ask is why did these cuts not work? This analysis provides a reasonable explanation that now requires immediate work by the CCSBT to resolve.

**Attachment 1**

AUSTRALIA

CCSBT-EC/0510/25

**Comparison of CCSBT catch data with Japanese auction sales of frozen SBT****THE JAPANESE MARKET FOR FROZEN SOUTHERN BLUEFIN TUNA IN 2004**

This paper provides an analysis of total frozen SBT declared **supply** and total frozen SBT **sales** in Japanese frozen SBT markets.

**Total Frozen SBT Declared **Supply** of the Japanese Frozen SBT Market**

Total Frozen SBT Supply = Total Japanese Frozen SBT Catch + Total Frozen SBT Imports

**Total Frozen SBT **Sales** in Japanese Markets**

Total Frozen SBT sales = Total (wild caught) Frozen SBT sales (auction + direct) + Total (Farmed) Frozen SBT sales (auction + direct)

**Total Frozen SBT Declared Supply of the Japanese Frozen SBT Market****Total Frozen SBT Declared Supply = Total Japanese Frozen SBT Catch + Total Frozen SBT Imports**

1. Total Japanese Frozen SBT Catch = Japanese CCSBT quota catch + Japanese New Zealand Charter catch
2. Total Frozen SBT Imports = Wild Caught frozen SBT imports + Farmed frozen SBT imports

**Total Frozen SBT Sales in Japanese Markets****Total Frozen SBT sales = Total (wild caught) Frozen SBT sales + Total (Farmed) Frozen SBT sales**

1. Total (Wild caught) Frozen SBT sales = Frozen (Wild Caught) SBT Auction sales + Frozen (Wild Caught) SBT direct sales
2. Total (Farmed) Frozen SBT sales = frozen (farmed) SBT Auction sales + Frozen (farmed) SBT direct sales

**THE JAPANESE MARKET FOR FROZEN SOUTHERN BLUEFIN TUNA IN 2004**

**Total Frozen SBT Declared Supply of the Japanese Frozen SBT Market**

**Total Frozen SBT Declared Supply = Total Japanese Frozen SBT Catch + Total Frozen SBT Imports**

1. Total Japanese Frozen SBT Catch = Japanese CCSBT quota catch + Japanese New Zealand Charter catch (converted to market weight)

$$= (5,846 + 126) \times 1/1.15 \quad (\text{Refer to Annex 1 and Annex 2})$$

$$= 5,193 \text{ Mt} \quad (\text{Market Weight})$$

2. Total Frozen SBT Imports = Wild Caught frozen SBT imports + Farmed frozen SBT imports

$$= 1,359 + 6,815 \quad (\text{Refer to Annex 3.})$$

$$= 8,174 \text{ Mt}$$

**Total Frozen SBT Declared Supply = Total Japanese Frozen SBT Catch + Total Frozen SBT Imports**

$$= 5,193 + 8,174$$

$$= \underline{13,367 \text{ Mt}} \quad (\text{Market Weight})$$

## Total Frozen SBT Sales in Japanese Markets

**Total Frozen SBT sales = Total (wild caught) Frozen SBT sales + Total (Farmed) Frozen SBT sales**

Assumption: Auction sales of frozen wild caught SBT are 75% of total sales of frozen wild caught SBT in the Japanese market.

The remaining 25% of total sales are made up of direct sales of wild caught frozen SBT. This 75% assumption is the high point of estimates provided by Japan's tuna marketers. If a less conservative figure of: Auction sales of frozen wild caught SBT representing 50% of total sales of frozen wild caught SBT sold in the Japanese market, as has been suggested by some of these same market sources, the amount of total frozen SBT sales on the Japanese market increases significantly. Assuming frozen wild caught SBT Auction sales are 75% of total Japanese frozen SBT wild caught sales then frozen wild caught direct SBT sales (i.e. sales that do not go through the auction system), are 25% of total sales.

**1. Total (Wild caught) Frozen SBT sales = (A.)Frozen (Wild Caught) SBT Auction sales + (b.) Frozen (Wild Caught) direct sales**

Assuming frozen wild caught SBT Auction sales are 75% of total frozen wild caught sales.

Assuming frozen wild caught SBT Direct sales are 25% of total frozen wild caught sales.

(a.) Frozen (Wild Caught) SBT Auction sales

$$\begin{aligned} 10,586\text{Mt (Japanese Auction sales see Annex 4.)} &= 75\% \times \text{Total wild caught Frozen SBT sales} \\ \text{Total Wild Caught Frozen SBT sales} &= 10,586/.75 \end{aligned}$$

$$\text{Total Wild Caught Frozen SBT sales} = 14,114\text{Mt}$$

(b.) Frozen Wild Caught direct SBT sales = 25% x 14,114 (See figure above)

$$\text{Frozen Wild Caught direct SBT sales} = 3,528\text{Mt}$$

$$\text{Total Wild caught Frozen SBT sales} = 14,114 \text{ Mt}$$

**2. Total (Farmed) Frozen SBT sales = frozen (farmed) SBT Auction sales + Frozen (farmed) direct SBT sales**



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= 69 Mt + 6,746 Mt

**Total (Farmed) Frozen SBT sales = 6,815 Mt** (See Australian frozen SBT imports into Japan Annex 3.)  
(See Annex 6. Supply Chain for Australian Farmed Frozen SBT)

**Total Frozen SBT sales = Total (wild caught) Frozen SBT sales + Total (Farmed) Frozen SBT sales**

= 14,114 + 6,815

= **20,929 Mt (Market Weight)**

**Balance of Japanese Frozen SBT market in 2004**  
(Conservative estimate)

$$\begin{aligned}
 \text{Balance of Japanese Frozen SBT market} &= \text{Total Frozen SBT Declared Supply (page 3)} - \text{Total Frozen SBT Sales (page 5)} \\
 &= 13,367\text{Mt} - 20,929\text{Mt} \\
 &= \underline{\underline{\text{Minus 7,562 Metric Tonnes (Market Weight)}}}
 \end{aligned}$$

**Total Over catch being sold In Japan's frozen SBT markets**

$$\begin{aligned}
 &= 7,562 \times 1.15 \text{ (Conversion to whole weight)} \\
 &= \underline{\underline{\text{8,696 Metric Tonnes}}}
 \end{aligned}$$

This analysis indicates that a conservative estimate of the oversupply of frozen SBT, in excess of declared CCSBT catch, to the Japanese market was **7,562 Metric Tonnes** in 2004. When converted back to whole weight (X 1.15) it equates to an over catch of 8,696 Metric Tonnes.

**ANNEX 1. CCSBT Catch 1991 - 2004**

Metric Tonnes (Whole weight)

| Year | Japan | Australia | Taiwan | Korea | New Zealand | Indonesia | Other Incl. Phillip and Misc | Total |
|------|-------|-----------|--------|-------|-------------|-----------|------------------------------|-------|
| 1991 | 6477  | 4489      | 1460   | 246   | 164         | 759       | 97                           | 13692 |
| 1992 | 6121  | 5248      | 1222   | 41    | 279         | 1232      | 73                           | 14216 |
| 1993 | 6318  | 5373      | 958    | 92    | 217         | 1370      | 17                           | 14345 |
| 1994 | 6063  | 4700      | 1020   | 137   | 277         | 904       | 54                           | 13155 |
| 1995 | 5867  | 4508      | 1431   | 365   | 436         | 829       | 201                          | 13637 |
| 1996 | 6393  | 5128      | 1467   | 1320  | 139         | 1614      | 295                          | 16356 |
| 1997 | 5588  | 5316      | 872    | 1424  | 334         | 2210      | 333                          | 16077 |
| 1998 | 7500  | 4897      | 1446   | 1796  | 337         | 1324      | 476                          | 17776 |
| 1999 | 7554  | 5552      | 1513   | 1462  | 461         | 2504      | 483                          | 19529 |
| 2000 | 6000  | 5257      | 1448   | 1135  | 380         | 1203      | 48                           | 15471 |
| 2001 | 6674  | 4853      | 1580   | 845   | 358         | 1632      | 84                           | 16026 |
| 2002 | 6192  | 4711      | 1137   | 746   | 450         | 1691      | 285                          | 15212 |
| 2003 | 5762  | 5827      | 1128   | 254   | 390         | 564       | 113                          | 14038 |
| 2004 | 5846  | 5062      | 1298   | 131   | 393         | 677       | 82                           | 13489 |

**ANNEX 2.****New Zealand and Japan Charter  
Arrangement**

Japan and New Zealand have a cooperative arrangement for Japanese Longline vessels to catch a proportion of New Zealand's CCSBT SBT quota. Attached are figures for 2002 - 2004

|   | 2002 | 2003 | 2004 |
|---|------|------|------|
| Japan's Catch Under the arrangement<br>(Whole Weight - Metric Tonnes) | 148  | 83   | 126  |

**ANNEX 3. Japanese Imported Frozen Southern Bluefin Tuna (Metric Tonnes)**  
**MARKET WEIGHT**

|              | 2002<br>Frozen | 2003<br>Frozen | 2004<br>Frozen |
|--------------|----------------|----------------|----------------|
| Australia    | 6,354          | 3,560          | 6,815          |
| Taiwan       | 1,005          | 991            | 1,089          |
| Korea        | 951            | 491            | 138            |
| New Zealand  | 49             | 33             | 32             |
| Indonesia    | 66             | Nil            | Nil            |
| Other        | 233            | 80             | 100            |
| <b>Total</b> | <b>8,658</b>   | <b>5,155</b>   | <b>8,174</b>   |

Source: Japanese Ministry of Finance website  
[http://www.customs.go.jp/toukei/info/index\\_e.htm](http://www.customs.go.jp/toukei/info/index_e.htm) and  
<http://unstats.un.org/unsd/comtrade/default.aspx>

Calendar year

Note: The Australian tuna industry has indicated that there is no wild caught SBT included in Australian frozen SBT import figures.

Japanese import statistics do not differentiate between wild caught and cultivated frozen SBT product, by import code.

**ANNEX 4. Volume of Frozen SBT sold through Japanese Auction Markets**

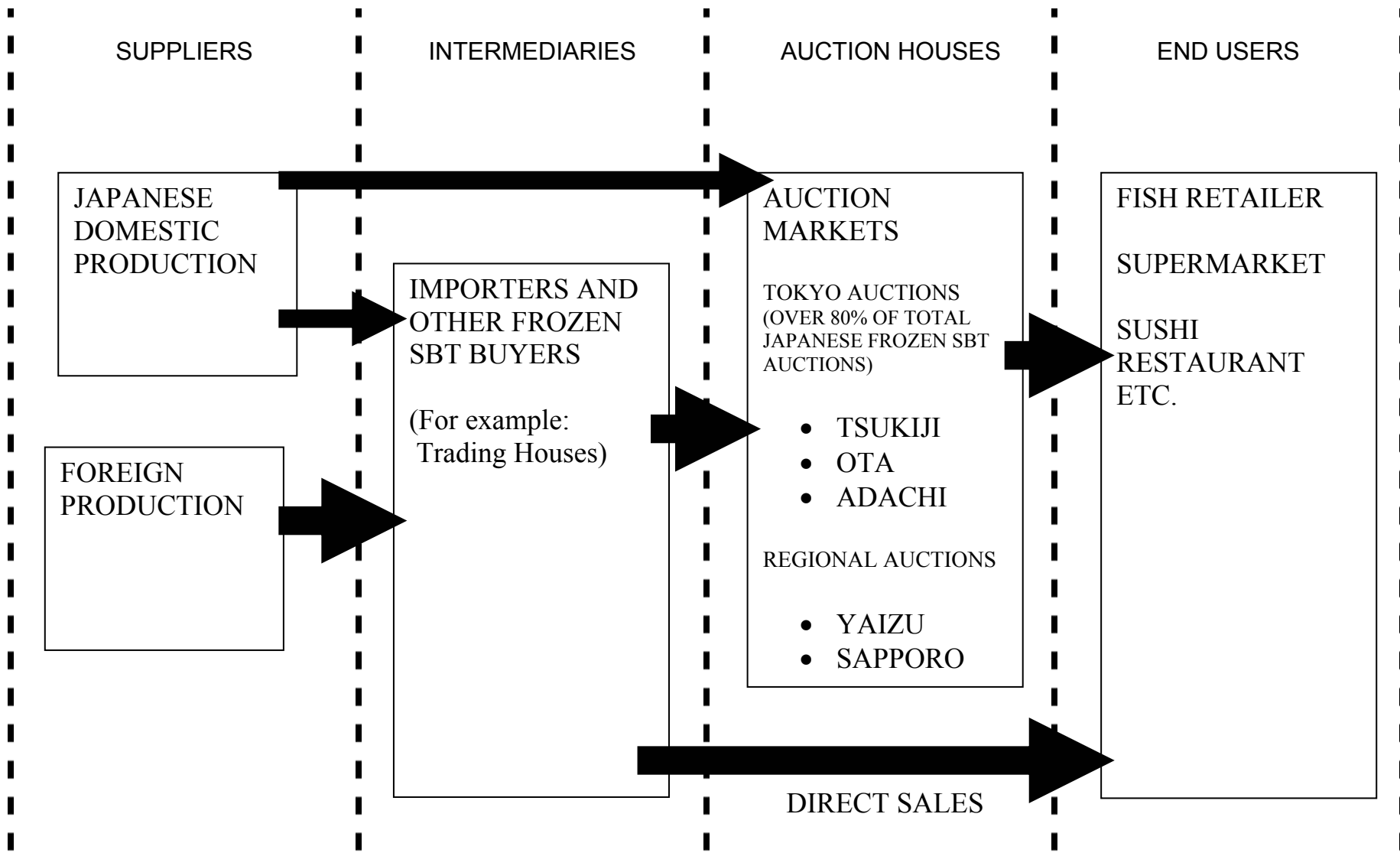
| MARKET WEIGHT - Mt | -                 |                   |                   | % of total<br>volume 2004 |
|--------------------|-------------------|-------------------|-------------------|---------------------------|
|                    | KG                |                   |                   |                           |
|                    | 2002              | 2003              | 2004              |                           |
| Tsukiji <b>a</b>   | 10,040,719        | 9,625,555         | 8,341,486         | 79%                       |
| Adachi <b>a</b>    | 227,518           | 210,331           | 174,933           | 2%                        |
| Ota <b>a</b>       | 179,108           | 132,298           | 87,508            | <1                        |
| Osaka <b>b</b>     | 632,030           | 542,519           | 399,835           | 4%                        |
| Yaizu <b>c</b>     | 1,782,215         | 1,438,899         | 1,288,610         | 12%                       |
| Sapporo <b>d</b>   | 5,745             | 3,076             | 12,704            | <1%                       |
| Misaki <b>e</b>    | 379,100           | 399,900           | 281,400           | 3%                        |
| <b>Total</b>       | <b>13,246,435</b> | <b>12,352,578</b> | <b>10,586,476</b> | <b>100%</b>               |

Sources:

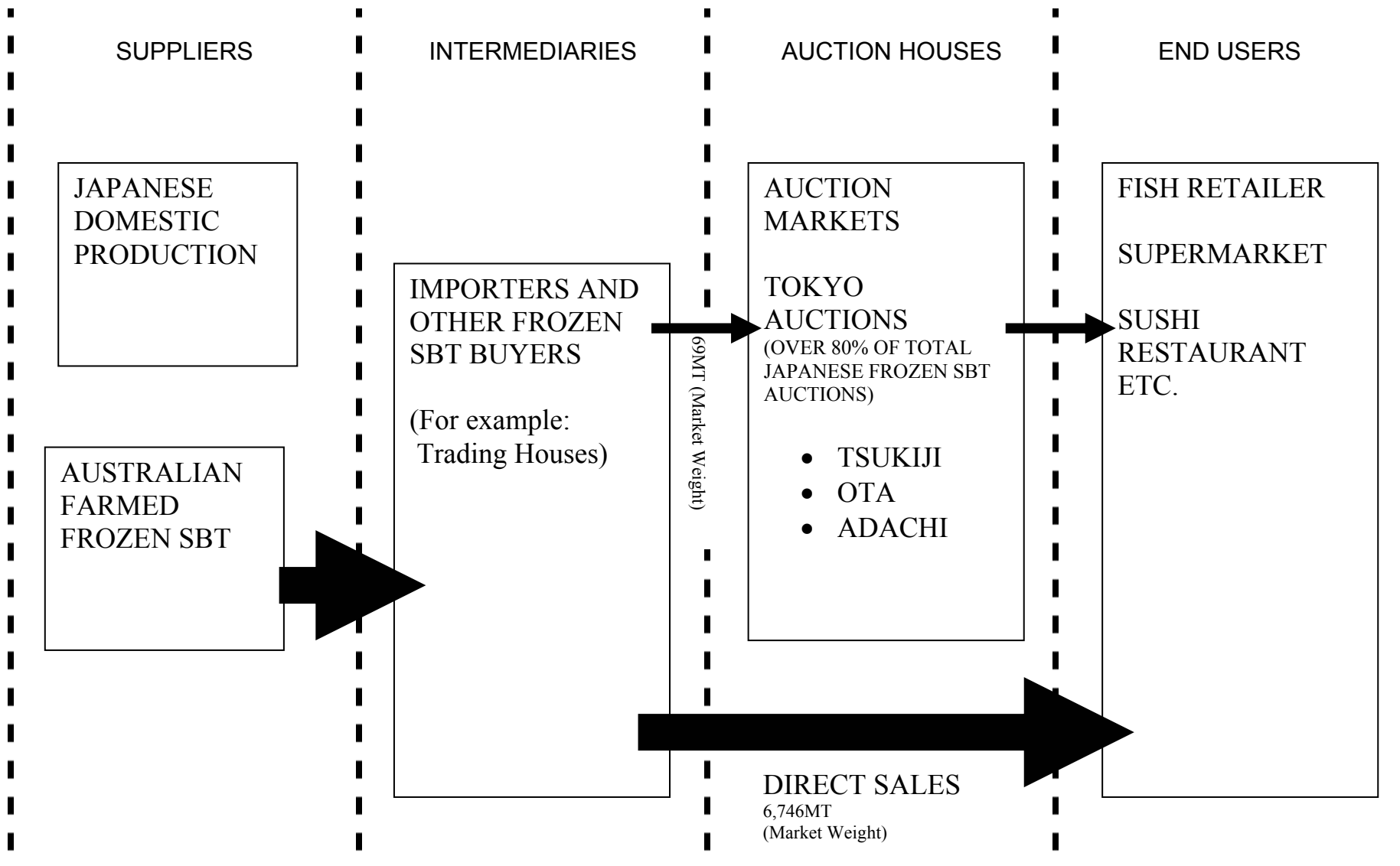
- a. [www.shijou.metro.tokyo.jp/](http://www.shijou.metro.tokyo.jp/)
- b. [www.shijou.city.osaka.jp/top.html](http://www.shijou.city.osaka.jp/top.html)
- c. [www.yaizu-gyokyo.or.jp](http://www.yaizu-gyokyo.or.jp)
- d. [www.sapporo-market.gr.jp/index.htm](http://www.sapporo-market.gr.jp/index.htm)
- e. [www.jafic.or.jp](http://www.jafic.or.jp)

Calendar  
year.

**Annex 5. Supply Chain for Japanese Frozen SBT Market**



Annex 6. Supply Chain for Australian Farmed Frozen SBT to the Japanese Market, 2004





**Annex 7: Estimated over catch being sold In Japan's frozen SBT markets (Whole Weight) Metric Tonnes**

|   | <b>2004</b> | <b>2003</b> | <b>2002</b> |
|---|-------------|-------------|-------------|
| <b>Assumption</b>   |             |             |             |
| Given frozen wild caught SBT<br>Auction sales are 50% of total frozen wild caught sales | 16,813      | 20,731      | 20,525      |
|   |             |             |             |
| Given frozen wild caught SBT<br>Auction sales are 75% of total frozen wild caught sales | 8,696       | 11,260      | 10,369      |