



Secretariat's Japanese Market Analyses 2025 (CC Agenda item 7.1)

1. Background

Since CCSBT Members approved Japan's Market Proposal at the 6th meeting of the Strategy and Fisheries Management Working Group (SFMWG 6) in 2023, the Secretariat has conducted the following analyses and submitted the results to the Compliance Committee (CC):

- A) Catches of each Member and its exports to Japan by fishing seasons, using CDS, national reports of catch, and trade statistics;
- B) Proportion of imports in the Japanese market (Correspondence Approach #1) by product types (Fresh Wild, Fresh Farmed, Frozen Wild and Frozen Farmed), using CDS, management tag survey and questionnaire to trade companies;
- C) Proportion of SBT (Frozen Wild, Frozen Farmed and Fresh) sold in major markets (Toyosu and Yaizu) in SBT landed and imported into Japan (Correspondence Approach #3), using CDS, management tag survey and questionnaire to trade companies.
- D) Import of farmed SBT from Australia into Japan (Correspondence Approach #4), using CDS and FRDC Seafood Production and Trade Databases;
- E) Imports (Fresh and Frozen) by each Member (Correspondence Approach #2), using CDS and trade statistics; and
- F) Comparison between weight data of individual SBTs, using CDS and management tag survey;
- G) Review of necessity to improve specification of CDS tag, checking the improvement of readability of CDS tags using the information accumulated through management tag survey.

The 19th Meeting of the Compliance Committee (CC 19) in 2024 specified that, in its Workplan for 2025, the Secretariat undertake Market Analyses (including items originally specified in the CC 18 Workplan) before CC 20.

Following the CC Workplan, the Secretariat conducted the specified analyses, and the outcomes are summarised below.

2. Results of Japanese Market Analyses in 2025

(i) Item A) – D) on SBTs in Japanese Market

The Secretariat updated the analyses in accordance with the format endorsed in 2023, as presented in **Appendix 1**.

Where necessary, adjustments were made to the original format and dataset to accommodate data availability and address potential confidentiality concerns.

This analysis showed a notable decline in SBT imports to Japan between 2023 and 2024, particularly from Australia and New Zealand.

(ii) Item E): Imports (Fresh and Frozen) by each Member (Correspondence Approach #2), using CDS and trade statistics

The Secretariat updated this analysis, originally conducted in 2023, by incorporating the latest available data through 2024. The results are presented in **Appendix 2**.

While a persistent coding error remains between CDS and Japanese trade statistics, specifically the reversal of “frozen” and “fresh” codes for Australian farmed SBT, overall quantities reported by each Member remain broadly consistent. However, in 2024, notable discrepancies were observed between CDS and JMOF data for Australia (870 t or 12.9 %) and Korea (177 t or 18.7 %).

(iii) Item F): Comparison between weight data of individual SBTs, using CDS and CDS Tag Survey

The details and results of this analysis are shown in **Appendix 3**.

The Secretariat again noted that, based on this analysis, it could be qualitatively stated that the catches reported by Members through the CTF are reasonably accurate.

(iv) Item G): Review of necessity to improve specification of CDS tag, checking the improvement of readability of CDS tags using the information accumulated through management tag survey

The Secretariat updated this analysis (previously conducted in 2023) by incorporating the latest data up to mid-2025, and the results are shown in **Appendix 4**.

In summary, the readability of CDS tags attached to SBT has been well improved up to mostly 100 %. The Secretariat notes that Australia’s tag-number readability in 2025 decreased largely (99% in 2023 to 60% in 2025). The recent high rate of tag detachment is likely due to their placement on the soft midsection of the anal fin, rather than the sturdier base part, which makes the fin more prone to tearing. Fishers using Australian style tags are encouraged to attach tags to fresh SBT closer to the base of the anal fin to ensure greater tag retention.

3. Publication of the results of the analyses

In accordance with the prior agreement of the Extended Commission, the Secretariat updated the summary of market analysis outcomes using the approved format, as presented in **Appendix 5**. These represent simple updates to [CCSBT-CC/2410/15](#) and reflect the analyses undertaken during the current year.

4. Action Required

CC 20 is invited to:

- Note the information presented in **Appendix 1 - 4** of this paper; and
- Taking into account that the Secretariat’s limited resources:
 - Recommend whether the analyses presented in this paper should be repeated again in full in 2026 or whether some indicators can be dropped; and
 - Consider limiting future iterations of the Japanese Market Analysis (item D) to the combined total of frozen and fresh product (rather than reporting fresh and frozen product separately) given the reporting inconsistencies that persist; and
 - If necessary, provide specific advice for the Secretariat to improve the current analyses; and

- Make a recommendation to the EC to publish **Appendix 5** of this paper, which summarises the outcome of the Japanese market analyses this year.

Prepared by the Secretariat

Result of Japanese Market Analyses in 2025 for Item A), B), C) and D)

Background

In this Appendix, the Secretariat provides an updated analyses for the following Market Analysis items, incorporating the latest data up to 2024 (or mid-2025 when available):

- A) Catches of each Member and its exports to Japan by fishing seasons, using CDS, national reports of catch, and trade statistics.
- B) Proportion of imports in the Japanese market (Correspondence Approach #1) by product types (Fresh Wild, Fresh Farmed, Frozen Wild and Frozen Farmed), using CDS, management tag survey and questionnaire to trade companies.
- C) Proportion of SBT (Frozen Wild, Frozen Farmed and Fresh) sold in major markets (Toyosu and Yaizu) in SBT landed and imported into Japan (Correspondence Approach #3), using CDS, management tag survey and questionnaire to trade companies.
- D) Import of farmed SBT from Australia into Japan (Correspondence Approach #4), using CDS and FRDC Seafood Production and Trade Databases.

These Market Analysis items are based on the “Correspondence Approach” suggested by the external expert in paper [CCSBT-CC/2210/19](#).

Result of Analyses

The result tables from the above analyses, presented in the agreed format, are shown below. Where necessary, the Secretariat made adjustments to the original format and specified dataset, taking into account data availability and potential confidentiality constraints.

Table 1.1- Item A): Catches of each Member landed at/imported into Japan by fishing seasons
Calendar Year: 2024

Member	Import to/landed in Japan which occurred in Calendar year 2024 ^{*1}	Export to/Landed in Japan which occurred in Calendar year 2024 ^{*2}	Catch in Fishing year ^{*3}
Japan	-	6,504.60	6,541.00
Australia	5,893.90	6,764.75	6,324.00
Indonesia	44.32	52.34	1,224.00
Korea	1,122.07	945.48	1,514.00
New Zealand	460.07	461.18	895.10
South Africa	28.83	29.09	244.13
Taiwan	761.00	735.45	1,264.00

^{*1} Japan's Trade Statistics except for the column for Japan.

^{*2} CDS data. Total amounts of exports to/landed in Japan which occurred in a calendar year.

^{*3} Annual National report to ESC. Note: the original format specified “CC” here, but Members’ national reports to CC are not available at the time of drafting this paper.

Table 1.2 - Item B): Proportion of imports in the Japanese market (Correspondence Approach #1) by product types

Table 1.2-1: Proportion of Imports by Product Type

Calendar year: 2024

	Proportion of Imports (%)		
	CDS ^{*1}	CDS Tag Survey ^{*2}	Questionnaire to trade companies ^{*3}
Fresh Wild	13.37 %	26.70 %	13.62 %
Fresh Farmed	52.90 %	0.00 %	0.22 %
Frozen Wild	18.87 %	73.30 %	17.81 %
Frozen Farmed	14.86 %	0.00 %	68.36 %

^{*1} Data source: CDS. Proportion of imports in total amount ((re)exports to JPN + JPN's domestic landings)

^{*2} Data source: Toyosu/Yaizu CDS tag survey data (Proportion of imports in total amount). Original format specified “Auction sampling” here, but those data are not available to the Secretariat, and CDS tag survey data are used as proxy.

^{*3} Data source: Questionnaire to trade companies. Imports into JPN/the total. Note: Data used here are 2023 data (these are the latest available data due to the timing of CCSBT-funded Toyosu Market Survey).

Table 1.2-2: Proportion of SBT in Japan that are imported against all SBT entered Japan

	Proportion of Imports (%)		
	CDS ^{*1}	CDS Tag Survey ^{*2}	Questionnaire to trade companies ^{*3}
2024	62.19 %	37.97 %	Data Not Available
2023	64.61 %	34.14 %	60.10 %
2022	66.90 %	22.53 %	67.17 %
2021	64.93 %	25.39 %	60.08 %
2020	67.80 %	16.73 %	62.25 %

^{*1} Data source: CDS. Proportion of imports in total amount ((re)exports to JPN + JPN's domestic landings)

^{*2} Data source: Toyosu/Yaizu CDS tag survey data (Proportion of imports in total amount). Original format specified “Auction sampling” here, but those data are not available to the Secretariat, and CDS tag survey data are used as proxy.

^{*3} Data source: Questionnaire to trade companies. Imports into JPN/the total. Note: Data used here are 2023 data (The 2023 data is the latest available data due to the timing of the CCSBT-funded Toyosu Market Survey).

Table 1.3 – Item C): Proportion of SBT sold in major markets (Toyosu and Yaizu) in SBT landed and imported into Japan (Correspondence Approach #3)

Frozen and Fresh Combined

	(1) SBT entered Japan ^{*1}	(2) SBT sold in Toyosu and Yaizu Market ^{*2}	Proportion of SBT sold in two major markets ((1)/(2)) (%) ^{*3}	Proportion of SBT sold in Japanese markets (%) ^{*4}
2024	14,680.81	6,416.64	43.71 %	78.62 %
2023	16,153.09	6,386.42	39.54 %	87.22 %
2022	14,821.65	6,123.86	41.32 %	87.47 %
2021	15,987.24	6,519.79	40.78 %	88.91 %
2020	15,998.06	5,712.33	35.71 %	89.57 %

^{*1} Data source: CDS. Exports of SBT to JPN + SBTs caught by JPN and landed in Japan.

^{*2} Data source: Statistics of Toyosu and Yaizu Markets. Yearly Total amount of Frozen and Fresh SBT sold in the markets.

^{*3} SBT sold in 2 markets as a percentage of the total amount of SBT entered into Japan

^{*4} Proportion of (1) against Members' CDS Catch/Harvest. Note: This figure shows what percentage of SBT are sold in Japan. The original format specified "Data source: Questionnaire to trade companies. Proportion of amounts of SBT sold in Japanese markets", but those data are not usable for this purpose due to representativeness issues and consequently, the sum of those data are not comparable with (1) of this table.

Toyosu Statistics: <https://www.shijou-tokei.metro.tokyo.lg.jp/asp/smnu2.aspx?gyoshucd=2&smode=10>

Yaizu Statistics: <https://www.yaizu-gyokyo.or.jp/catch-year/>

Table 1.4 - Item D) Import of farmed SBT from Australia into Japan (Correspondence Approach #4)

	Export of Farmed SBT from AU ^{*1}	Export of Farmed SBT from South Australia ^{*2}
2024	6,090.47	6,108.40
2023	7,601.86	7,704.93
2022	6,994.00	7,441.79
2021	7,259.86	7,158.94
2020	7,722.55	8,484.41

^{*1} Data source: CDS. Amounts of exports of SBT from Australia into Japan.

^{*2} Data source: FRDC Seafood Production and Trade Database. Amounts of exports of SBT from South Australia into Japan - <https://www.frdc.com.au/seafood-import-and-export-volume-species>

**Analysis for Japan's SBT Imports (Fresh and Frozen) from other CCSBT Members using
CDS data and Japan's trade statistics
(Japanese Market Analysis item D))**

1. Background

In this Appendix, the Secretariat updates the Japanese Market Analysis Item D), by incorporating the latest available data up to 2024.

This analysis is related to Japan's SBT imports (Fresh and Frozen) from other CCSBT Members, as suggested by the external expert as "Correspondence Approach #2" in paper [CCSBT-CC/2210/19](#).

2. Data used for this analysis

The Secretariat used the following datasets to conduct this trial analysis:

- 1) CDS data on Japan's SBT import from other CCSBT Members recorded in CMF and CTF (2010-2024 calendar year); and
- 2) Japan's official SBT trade statistics (2010 - 2024 calendar year), which are publicly available from [the Trade Statistics of Japan](#) (operated by the Ministry of Finance of Japan (JMOF)).

3. Comparison of Japan's SBT import figures from two data sources

The Secretariat conducted a comparison of Japan's SBT import figures from CDS and Japan's trade statistics (JMOF).

A comparison of Fresh SBT imported by Japan is shown in **Table 2-1** and **Figure 2-1** below.

Table 2-1: Quantity of Fresh SBT entering Japan as an Import from CDS and Japan's trade statistics (JMOF) (unit: t)

	AU		ID		KR		NZ		TW		ZA	
	CDS	JMOF	CDS	JMOF	CDS	JMOF	CDS	JMOF	CDS	JMOF	CDS	JMOF
2010	3,927.27	1,638.14	196.60	154.79	-	-	248.82	249.47	-	-	12.35	11.48
2011	4,016.16	755.88	241.79	154.90	-	-	300.61	295.25	-	-	10.45	7.59
2012	4,878.44	848.29	230.13	167.82	-	-	456.55	449.33	-	-	11.27	9.43
2013	6,136.26	1,107.28	255.74	215.25	0.01	-	469.62	471.39	0.83	-	3.59	2.36
2014	6,489.03	685.37	293.62	265.52	1.43	-	496.75	495.75	-	-	6.56	1.12
2015	6,335.56	883.72	245.82	232.84	2.72	-	542.20	540.87	-	-	9.71	7.39
2016	6,644.08	1,112.77	201.00	189.98	-	-	776.02	773.55	-	-	12.95	11.57
2017	5,797.52	1,027.36	74.83	70.71	-	-	762.85	761.97	-	-	35.80	32.73
2018	5,882.07	917.20	54.02	50.58	-	1,018.65	825.50	824.86	-	604.80	63.53	61.76
2019	6,107.69	702.93	25.81	22.33	0.54	-	794.42	657.95	-	0.86	31.05	32.27
2020	5,159.01	496.86	24.13	20.59	-	-	653.93	653.11	-	-	20.40	19.82
2021	4,887.73	293.95	39.31	36.02	-	-	558.23	557.78	-	-	7.12	6.94
2022	6,001.05	358.00	30.68	28.54	-	-	548.35	547.79	-	-	8.64	8.52
2023	6,524.15	494.84	36.91	34.46	0.05	-	690.26	687.76	-	-	10.00	9.82
2024	5,418.32	703.05	49.24	44.32	-	-	459.61	460.07	-	-	29.09	28.83

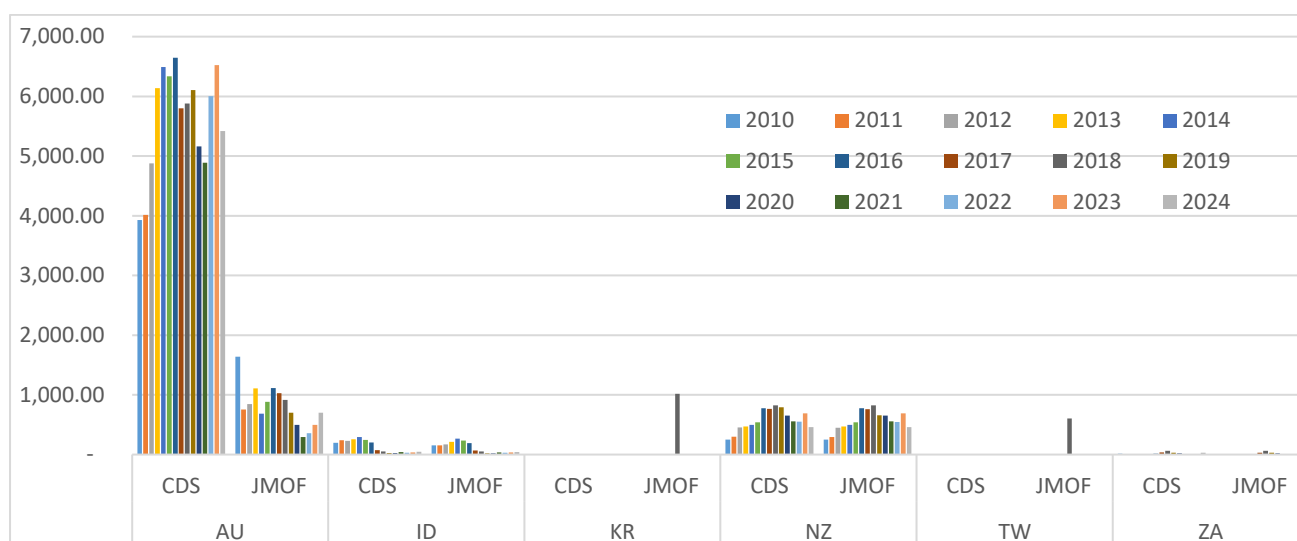


Figure 2-1: Visual comparison of Fresh SBT quantities entering Japan as an Import by Member and by Year

A Comparison for Frozen SBT imported by Japan is shown in **Table 2-2** and **Figure 2-2** below.

Table 2-2: Quantity of Frozen SBT entering Japan as an Import from CDS and Japan's trade statistics (JMOF) (unit: t)

Year	AU		ID		KR		NZ		TW		ZA	
	CDS	JMOF	CDS	JMOF	CDS	JMOF	CDS	JMOF	CDS	JMOF	CDS	JMOF
2010	2,568.68	4,885.36	66.98	70.82	857.27	829.66	225.40	-	934.86	983.56	0.06	-
2011	3,121.86	6,323.17	145.25	175.95	563.03	456.98	172.80	-	463.20	458.75	14.02	-
2012	2,340.46	6,080.85	184.15	176.31	965.67	846.02	208.15	-	315.99	310.02	20.43	-
2013	1,776.82	6,769.10	214.91	210.74	774.49	1,000.27	163.73	-	609.27	611.76	17.46	-
2014	2,567.60	8,206.94	299.25	295.39	1,097.74	1,102.93	195.59	-	508.17	390.00	2.53	-
2015	2,315.50	7,620.77	148.68	117.33	936.07	799.93	223.42	-	895.50	1,022.47	4.68	-
2016	2,505.06	7,895.10	3.85	6.79	883.66	1,012.92	0.05	-	730.42	622.12	12.23	-
2017	1,848.82	6,576.28	0.05	-	885.40	950.94	0.70	-	823.62	942.43	18.09	-
2018	3,124.65	8,110.56	0.15	1.19	776.09	-	-	-	649.56	-	11.87	-
2019	2,877.95	8,269.11	-	-	1,087.25	789.36	-	-	989.42	963.66	39.96	-
2020	3,047.28	7,770.26	-	-	1,081.17	1,128.77	-	-	768.36	804.54	-	-
2021	2,669.71	7,133.69	-	-	1,084.92	1,034.94	-	-	1,049.43	1,044.87	2.41	-
2022	1,351.96	6,864.93	-	-	1,027.88	1,353.64	-	-	947.75	1,033.99	-	-
2023	1,559.80	7,454.65	-	-	1,010.99	1,081.29	-	-	586.62	518.90	-	-
2024	1,346.44	5,190.85	3.11	-	945.48	1,122.07	1.57	-	735.45	761.00	-	-

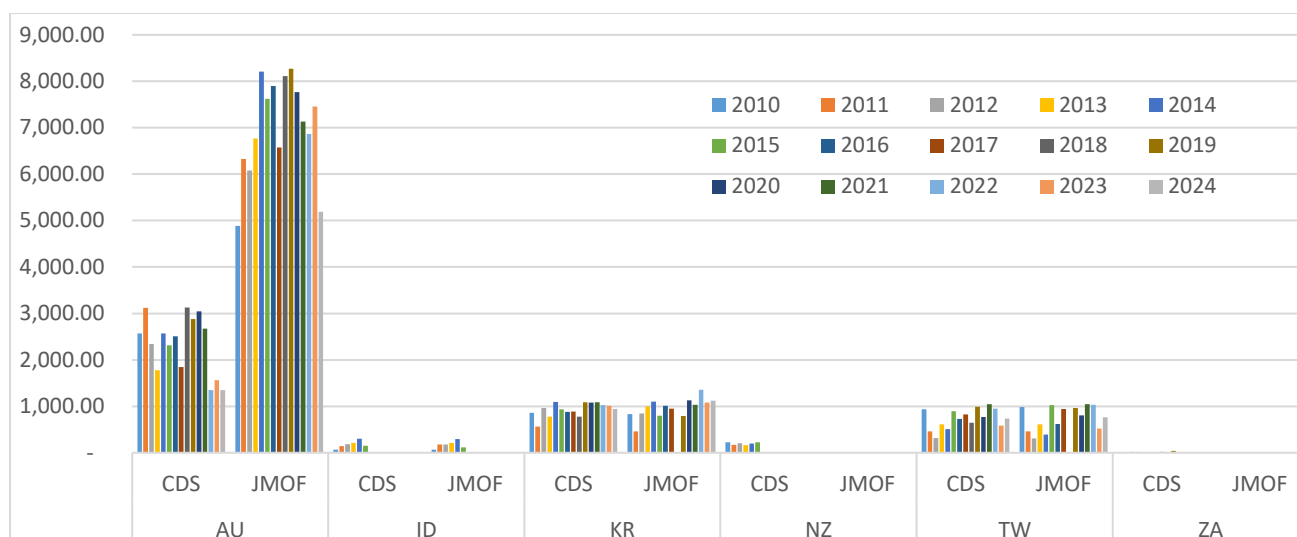


Figure 2-2: Visual comparison of Frozen SBT quantities entering Japan as an Import by Member and by Year

A Comparison for Fresh + Frozen SBT imported by Japan is shown in **Table 2-3** and **Figure 2-3** below.

Table 2-3: Quantity of Fresh + Frozen SBT entering Japan as an Import from CDS and Japan's trade statistics (JMOF) (unit: t)

Year	AU		ID		KR		NZ		TW		ZA	
	CDS	JMOF	CDS	JMOF	CDS	JMOF	CDS	JMOF	CDS	JMOF	CDS	JMOF
2010	6,495.94	6,523.50	263.58	225.61	857.27	829.66	474.22	249.47	934.86	983.56	12.41	11.48
2011	7,138.02	7,079.05	387.04	330.85	563.03	456.98	473.41	295.25	463.20	458.75	24.46	7.59
2012	7,218.90	6,929.14	414.28	344.13	965.67	846.02	664.69	449.33	315.99	310.02	31.71	9.43
2013	7,913.08	7,876.38	470.65	425.99	774.50	1,000.27	633.35	471.39	610.11	611.76	21.05	2.36
2014	9,056.63	8,892.31	592.86	560.91	1,099.17	1,102.93	692.34	495.75	508.17	390.00	9.09	1.12
2015	8,651.06	8,504.49	394.50	350.17	938.79	799.93	765.62	540.87	895.50	1,022.47	14.39	7.39
2016	9,149.14	9,007.87	204.85	196.78	883.66	1,012.92	776.06	773.55	730.42	622.12	25.18	11.57
2017	7,646.34	7,603.64	74.88	70.71	885.40	950.94	763.54	761.97	823.62	942.43	53.88	32.73
2018	9,006.72	9,027.76	54.17	51.76	776.09	1,018.65	825.50	824.86	649.56	604.80	75.40	61.76
2019	8,985.64	8,972.03	25.81	22.33	1,087.79	789.36	794.42	657.95	989.42	964.52	71.01	32.27
2020	8,206.28	8,267.12	24.13	20.59	1,081.17	1,128.77	653.93	653.11	768.36	804.54	20.40	19.82
2021	7,557.44	7,427.64	39.31	36.02	1,084.92	1,034.94	558.23	557.78	1,049.43	1,044.87	9.54	6.94
2022	7,353.01	7,222.94	30.68	28.54	1,027.88	1,353.64	548.35	547.79	947.75	1,033.99	8.64	8.52
2023	8,083.95	7,949.49	36.91	34.46	1,011.04	1,081.29	690.26	687.76	586.62	518.90	10.00	9.82
2024	6,764.75	5,893.90	52.34	44.32	945.48	1,122.07	461.18	460.07	735.45	761.00	29.09	28.83

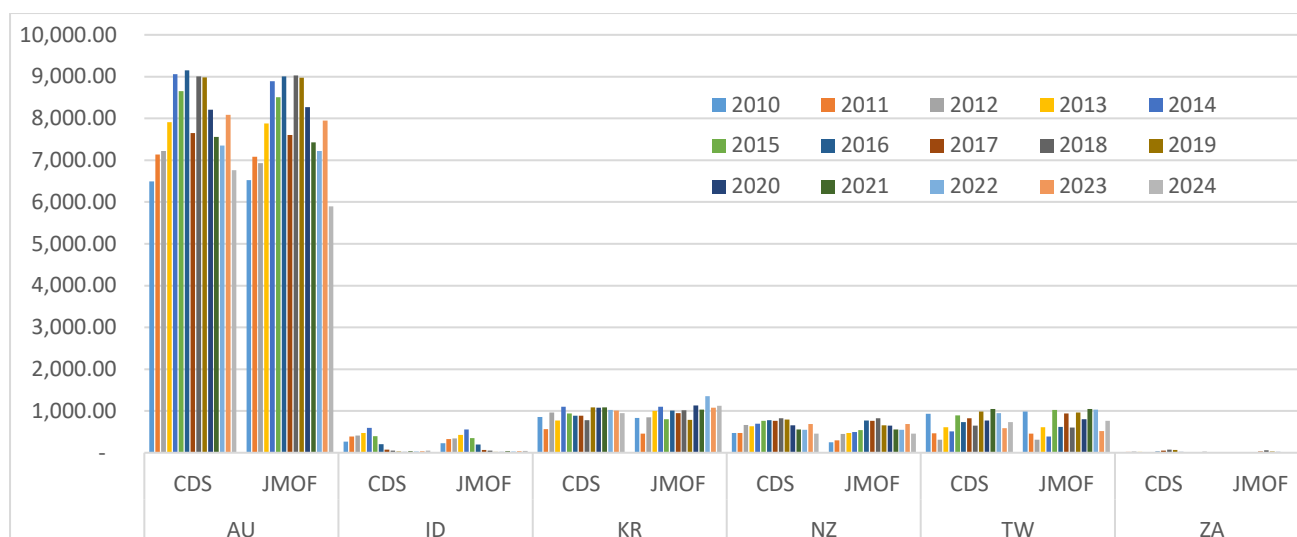


Figure 2-3: Visual comparison of Fresh + Frozen SBT quantities entering Japan as an Import by Member and by Year

In principle, CDS and JMOF figures should align closely for both fresh and frozen SBT imports into Japan. However, significant discrepancies persist in the reported quantities of both product types. These appear to stem primarily from large volumes of Australian frozen SBT being recorded as fresh in the CDS, while Japan's trade statistics classify them as frozen.

This issue was previously identified in [CCSBT-CC/2310/13](#), which analysed data from 2010 to 2022 and concluded that substantial quantities of frozen SBT had likely been inadvertently reported as fresh on CDS forms. The current report extends that analysis to include 2023 and 2024 data, indicating that miscoding between fresh and frozen categories has continued into 2024. Without changes to the reporting practices, there is little value in continuing this analysis at a processing level and future iterations of this exercise should be limited to the analysis of the combined total of both fresh and frozen.

Additionally, the Secretariat notes that miscoding occurred in JMOF data for frozen SBT from Korea and Taiwan in 2018. In the most recent year (2024), notable discrepancies remain between CDS and JMOF figures—particularly for Australia (a difference of 870 t or 12.9 %) and Korea (177 t or 18.7 %).

**Updated analysis for verification of reported catch by Members with CDS data and CDS Tag
Survey data obtained from Japanese market
(Japanese Market Analysis item F))**

1. Background

In 2024, the EC 31 approved the CC 19 Workplan, and it specified for the Secretariat to “Update Market Analyses (including items originally specified in the CC 18 Workplan)”.

In this **Appendix 2**, the Secretariat provides the updated analysis, incorporating the latest Market Survey Data (up to mid-2025) and CTF data held by the Secretariat.

2. Data used for this trial analysis

The Secretariat used the following datasets to update this analysis.

1) *Individual SBT data from CCSBT CDS Catch Tagging Forms (2010 - mid 2025¹)*

These data are collected from Members and maintained by the Secretariat through the Catch Documentation Scheme (CDS) from 2010 to date.

This dataset includes CDS tag number, product type, product weight of each fish, fishing information, origin of fish (Member, wild/farming) etc².

The numbers of CDS tags recorded on CTFs by Members are shown in **Table 3-1** below.

Table 3-1. Number of CDS tags (= number of SBT) recorded on CTFs by Member and year (2010 – 2024).

	AU	ID	JP	KR	NZ	TW	ZA	Total
2010	185,538	4,990	38,558	14,898	8,473	33,028	557	286,042
2011	213,830	11,936	63,282	13,291	8,811	15,156	687	326,993
2012	288,855	9,165	51,205	15,743	13,537	17,451	972	396,928
2013	278,440	18,187	49,459	19,540	11,922	33,553	478	411,579
2014	266,731	11,573	58,814	15,835	13,800	26,659	461	393,873
2015	301,638	5,944	85,182	22,000	14,973	33,004	645	463,386
2016	324,200	6,362	80,348	19,112	19,763	30,392	620	480,797
2017	275,531	9,617	85,019	18,352	19,255	32,845	1,210	441,829
2018	341,346	10,946	106,627	20,310	19,919	35,495	2,294	536,937
2019	360,174	12,834	112,021	21,116	16,548	34,615	2,539	559,847
2020	344,072	13,578	91,667	17,931	15,517	29,512	1,311	513,588
2021	342,756	12,463	112,343	20,456	14,070	37,783	1,268	541,139
2022	412,505	11,207	101,001	19,255	18,221	36,183	1,748	600,120
2023	463,237	11,085	109,520	22,393	20,514	28,023	1,395	656,167
2024	409,985	12,754	119,907	28,242	18,243	37,433	3,426	629,990
Total	4,808,838	162,641	1,264,953	288,474	233,566	461,132	19,611	7,239,215

¹ Due to the different timing for reporting/data submission between CDS and the Tag Survey, the 2025 data currently shown in this paper should be considered preliminary and indicative.

² Details are available in Appendix 1 of the [Resolution on the Implementation of a CCSBT Catch Documentation Scheme](#).

2) Japan's market CDS Tag Survey data (2010 – mid 2025)

Tag Survey data are obtained through Japan's market CDS Tag Survey in the major Japanese wholesale markets and through the CCSBT-funded Toyosu Market Survey (hereinafter "Market Survey")³.

This dataset includes the date of survey, CDS tag number, marketplace, fishing vessel ID (call sign), product weight of fish, name of the wholesaler, and origin of fish (Member, wild or farming), etc. As Japan has ceased its market survey in Yaizu market, new data for this year's analysis are only from the CCSBT Market Survey.

The number of fish observed/recorded by the Market Survey by Member is shown in **Table 3-2** below.

Table 3-2. Number of SBT observed/recorded by the Market Survey by Member, and increased number/percentage of observed SBT since the previous study in 2024.

	AU	ID	JP	KR	NZ	TW	ZA	Total
Number of observed SBT in Market Survey (2010-mid 2025)	3,013 (2593)	893 (893)	90,888 (86807)	18,187 (16801)	4,025 (3417)	17,012 (16513)	152 (135)	134,170 (127159)
Increased No. of observed SBT since 2024	420	-	4,081	1,386	608	499	17	7,011
increased %	16.2%	0.0%	4.7%	8.2%	17.8%	3.0%	12.6%	5.5%

Note: Within the table above, brackets show figures for 2010 – mid 2024 (i.e. figures indicated in [CCSBT-CC/2410/15](#)).

It should be noted that the data recorded in the Market Survey described above contained many missing or incomplete data. The main reason was that there were unreadable CDS tags for some reason, such as the tag being embedded in frozen SBT meat, partially damaged, detached, or a recording error by the surveyor.

3. Updated Analysis

The Secretariat conducted analyses using the datasets described in Section 2 above.

1) Data preparation for trial analysis

To integrate the two datasets outlined in Section 2, the Secretariat imported the Market Survey data provided by Japan into the CDS database and conducted a matching process based on CDS tag numbers common to both the Market Survey and CTF datasets.

The number of SBT individuals with matching CDS tag numbers across these datasets is presented in **Table 3-3** below.

³ Japan has voluntarily conducted SBT CDS Tag Survey twice a month at Toyosu market (as well as at Tsukiji and Yaizu market since 2007). Japan's Toyosu market Tag Survey has been replaced by the CCSBT-funded survey since April 2023. Japan has ceased its Tag Survey in Yaizu market.

Table 3-3. Number of matches of CDS tag numbers between the Market Survey data and CTF data.

Member/ CNM	Number of observed SBT in Market Survey (2010-mid 2025) (A)	Number of observed tags		Rate		
		"Readable" tag numbers (B)	Number of "matched" tag numbers (C)	"Readable" rate against all records (B/A)	CTF - Matching rate against all records (C/A)	CTF - Matching rate against "readable" tag (C/B)
AU	3,013	2,437	2,183	80.88%	72.45%	89.58%
ID	893	729	642	81.63%	71.89%	88.07%
JP	90,888	79,796	78,954	87.80%	86.87%	98.94%
KR	18,187	12,918	12,612	71.03%	69.35%	97.63%
NZ	4,025	3,848	3,498	95.60%	86.91%	90.90%
TW	17,012	12,923	11,651	75.96%	68.49%	90.16%
ZA	152	115	98	75.66%	64.47%	85.22%
Total/ Average	134,170	112,766	109,638	84.05%	81.72%	97.23%

CDS tag numbers were readable for 84.05 % of SBT individuals observed in the Market Survey, corresponding to 112,766 out of a total of 134,170 individuals. Readability rates varied among Members, ranging from 71.03 % to 95.60 %. While the overall readability rate was high, Korea, Taiwan, and South Africa recorded comparatively lower rates, approximately 70-75 %. As noted in **Appendix 4** of this paper, tag readability has improved substantially in recent years.

The matching rate between readable tag numbers from the Market Survey and the CTF data was also high, averaging 97.23 % across all Members, with individual rates ranging from 85.22 % to 98.94 %. South Africa exhibited the lowest matching rate at 85.22 %. Assuming a consistent data entry error rate within the Market Survey, this discrepancy may reflect Member-specific error rates in the CTF records.

The Secretariat developed a new dataset for this analysis by extracting records from the integrated dataset, which was compiled through matching CDS tag numbers as described above. The extracted data for this analysis included the following elements:

- CDS tag numbers of matched SBT individuals
- Survey year in which SBT individuals were observed in Japanese market
- Product weights of SBT individuals observed/recorded in Japanese market
- Product type of individuals as recorded in the CDS
- Product weights of individuals as recorded in the CDS
- CCSBT Statistical Area in which SBT individuals were caught as recorded in the CDS

Using this dataset, the Secretariat calculated the differences in product weights between the two sources and subsequently derived the mean and standard deviation of the proportional differences for each stratum (defined by Member, year, product type, and CCSBT Statistical Area).

2) *Coverage and representativeness of Japan's Market Survey data against all SBT individuals*

The Number of SBT individuals matched between Market Survey data and CTF data by Member and year is shown in **Table 3-4**.

Table 3-4: Number of individuals matched between Market Survey data and CTF data by Member and year. Figures in the cells indicate the number of individuals.

	AU	ID	JP	KR	NZ	TW	ZA	Total
2010*	-	10	967	164	-	591	-	1,732
2011*	-	90	2,386	631	89	904	-	4,100
2012*	-	211	3,064	688	40	311	9	4,323
2013*	5	147	2,443	1,210	19	401	3	4,228
2014*	8	150	3,874	1,163	54	1,292	-	6,541
2015*	89	34	5,228	924	141	1,253	-	7,669
2016*	-	-	6,473	1,237	27	1,092	-	8,829
2017*	-	-	6,834	1,231	5	768	-	8,838
2018*	-	-	7,634	1,159	-	1,195	-	9,988
2019*	227	-	8,175	372	361	1,159	20	10,314
2020*	282	-	7,129	275	317	518	40	8,561
2021*	728	-	7,559	428	564	853	-	10,132
2022*	244	-	7,049	605	646	546	9	9,099
2023*	413	-	4,378	772	821	263	-	6,647
2024*	187	-	4,375	1,275	414	318	17	6,586
2025*	-	-	1,386	478	-	187	-	2,051
Total	2,183	642	78,954	12,612	3,498	11,651	98	109,638

* Year code in Table 2-4 above is based on the date of Market Survey. Given the time lag between landing/importing and wholesale market auction, and also considering the fact that fishing season is varied between Members, the results of the calculations above should be recognised as indicative, as some matching counts may be inherently more correct to be categorised in different years. The same caution should be applied to all tables and figures below in this document.

Table 3-4 shows a very large variation in the number of matches between Members each year.

To assess the representativeness of the Market Survey data, the number of matched SBT individuals identified in **Table 3-4** was compared against the total number of CDS tags registered in the CTF by Member and year, as shown in **Table 3-1**. The resulting coverage of the Market Survey data relative to the full CTF dataset is presented in **Table 3-5** below.

Table 3-5. Coverage (percentage) of Number of matches to Market Survey data against the total number of CDS tag numbers registered with the CTF, by Member and year

	AU	ID	JP	KR	NZ	TW	ZA	Total
2010	0.00%	0.20%	2.51%	1.10%	0.00%	1.79%	0.00%	0.61%
2011	0.00%	0.75%	3.77%	4.75%	1.01%	5.96%	0.00%	1.27%
2012	0.00%	2.30%	5.98%	4.37%	0.30%	1.78%	0.93%	1.12%
2013	0.00%	0.81%	4.94%	6.19%	0.16%	1.20%	0.63%	1.04%
2014	0.00%	1.30%	6.59%	7.34%	0.39%	4.85%	0.00%	1.68%
2015	0.03%	0.57%	6.14%	4.20%	0.94%	3.80%	0.00%	1.65%
2016	0.00%	0.00%	8.06%	6.47%	0.14%	3.59%	0.00%	1.84%
2017	0.00%	0.00%	8.04%	6.71%	0.03%	2.34%	0.00%	2.00%
2018	0.00%	0.00%	7.16%	5.71%	0.00%	3.37%	0.00%	1.86%
2019	0.06%	0.00%	7.30%	1.76%	2.18%	3.35%	0.79%	1.84%
2020	0.08%	0.00%	7.78%	1.53%	2.04%	1.76%	3.05%	1.67%
2021	0.21%	0.00%	6.73%	2.09%	4.01%	2.26%	0.00%	1.87%
2022	0.06%	0.00%	6.98%	3.14%	3.55%	1.51%	0.51%	1.52%
2023	0.09%	0.00%	4.00%	3.45%	4.00%	0.94%	0.00%	1.01%
2024	0.05%	0.00%	3.65%	4.51%	2.27%	0.85%	0.50%	1.05%
Total	0.05%	0.39%	6.24%	4.37%	1.50%	2.53%	0.50%	1.52%

As shown in **Table 3-5**, the overall coverage of Market Survey data relative to CTF records from 2010 to the present is 1.52 %. Coverage rates have varied considerably among Members in recent years, ranging from 0 % to approximately 4.5 %. The cumulative coverage of far-sea longline Members's (Japan, Korea, and Taiwan) since 2010 is comparatively higher, at 6.24 %, 4.37 %, and 2.53 %, respectively. However, coverage for Japan and Taiwan has declined in recent years.

For Japan, the 2024 coverage rate (3.65 %) remained similar to that of 2023, but represents a significant decrease from 2022, when coverage was 6.98 %. New Zealand also showed a decline, with coverage falling from 4.00 % in 2023 to 2.27 % in 2024. These reductions may suggest a shift toward increased bilateral direct trading from the traditional auction mechanism.

In contrast, Korea has demonstrated a consistent upward trend in coverage, reaching 4.51% in 2024, which is the highest level recorded in the past five years.

Given the coverage indicated above, it may require careful consideration whether the data obtained from the Market Survey is representative enough to be used in assessing the accuracy and identifying compliance trends in the CDS of all Members' stakeholders (mainly fishers and farming operators).

3) *Verification of reported catch by Members with CDS data and CDS Tag Survey data obtained from Japanese market*

Both the Market Survey and CTF record net weights for SBT, and these values are directly comparable, as changes in product type between landing, export/import, and auction are considered unlikely.

As outlined in Section 3-1, the Secretariat calculated the difference in product weight for each individual SBT by subtracting the CTF-recorded weight from the Market Survey weight. The mean and standard deviation of the proportional differences were then calculated by Member. A proportion of zero indicates full consistency between the two datasets, suggesting accurate weight reporting by the Member.

Conversely, a negative proportion implies that the weight recorded on the vessel or at the farm exceeded the weight measured at auction. For some Members, this may reflect a tendency for fishers to weigh SBT conservatively, potentially to avoid exceeding quota limits (for example, a fish weighing 49.5 kg might be rounded up and recorded as 50 kg in the CTF, accounting for potential instability in weighing on board).

Despite the overall comparability of weight data, substantial discrepancies between Market Survey and CTF weights were observed for a considerable number of individual SBT records. To visually illustrate this variation, a bubble plot showing the relationship between Market Survey weight and CTF weight by Member is provided in **Attachment A**.

In each plot, the vertical axis represents the CTF-recorded weight, while the horizontal axis corresponds to the Market Survey weight. Each bubble reflects the number of records within a 5 kg weight bin (the larger the bubble, the higher the count). Generally, the two datasets show strong alignment, with most bubbles clustering around the 1:1 line. However, Members with larger sample sizes tend to exhibit a greater number of outliers.

To further highlight the extent of extreme discrepancies, **Table 3-6** presents the maximum positive and negative weight differences between the two datasets, disaggregated by Member.

Table 3-6. Maximum discrepancy between Market Survey weight data and CTF weight data (positive and negative directions) by Member.

	AU		ID		JP		KR		NZ		TW		ZA		All	
	Plus	Minus	Plus	Minus	Plus	Minus	Plus	Minus	Plus	Minus	Plus	Minus	Plus	Minus	Plus	Minus
2010	-	-	4.00%	-63.19%	86.40%	-334.78%	55.79%	-175.00%	-	-	68.18%	-163.16%	-	-	86.40%	-334.78%
2011	-	-	71.88%	-93.99%	77.96%	-298.34%	-	-	74.14%	-160.87%	70.49%	-148.12%	-	-	77.96%	-298.34%
2012	-	-	81.09%	-76.10%	78.21%	-614.29%	81.65%	-180.30%	29.69%	-93.01%	74.81%	-172.73%	4.37%	-0.88%	81.65%	-614.29%
2013	-	-1.38%	62.72%	-1189.47%	72.55%	-900.00%	84.00%	-1229.41%	4.41%	-0.72%	69.51%	-128.57%	2.52%	1.35%	84.00%	-1229.41%
2014	-	-6.44%	69.61%	-46.55%	-	-	71.43%	-900.00%	68.86%	-164.57%	76.50%	-148.68%	-	-	76.50%	-900.00%
2015	58.51%	-181.69%	5.11%	-8.59%	67.14%	-207.45%	58.50%	-891.60%	65.78%	-120.59%	-	-	-	-	67.14%	-891.60%
2016	-	-	-	-	-	-	63.16%	-117.39%	53.24%	-22.45%	85.04%	-537.50%	-	-	85.04%	-537.50%
2017	-	-	-	-	-	-	65.65%	-220.69%	5.03%	-3.86%	75.66%	-169.46%	-	-	75.66%	-220.69%
2018	-	-	-	-	-	-	-	-	-	-	72.22%	-116.31%	-	-	72.22%	-116.31%
2019	48.81%	-115.28%	-	-	78.93%	-762.07%	66.41%	-754.37%	74.95%	-56.25%	72.48%	-174.51%	32.69%	-23.46%	78.93%	-762.07%
2020	60.21%	-116.05%	-	-	-	-	61.18%	-95.18%	-	-	53.72%	-46.63%	25.45%	-28.81%	61.18%	-116.05%
2021	56.52%	-25.55%	-	-	83.31%	-288.24%	75.29%	-310.57%	55.78%	-77.30%	68.52%	-594.44%	-	-	83.31%	-594.44%
2022	68.54%	-132.24%	-	-	70.04%	-281.88%	80.20%	-216.92%	73.79%	-122.50%	77.27%	-348.28%	16.88%	-12.11%	80.20%	-348.28%
2023	42.39%	-4.77%	-	-	80.39%	-174.44%	76.48%	-170.49%	75.68%	-67.88%	69.63%	-316.67%	-	-	80.39%	-316.67%
2024	54.93%	-15.23%	-	-	71.09%	-184.35%	74.85%	-209.59%	60.19%	-111.11%	55.50%	-515.38%	-	-18.90%	74.85%	-515.38%
2025	-	-	-	-	64.34%	-68.52%	58.46%	-124.70%	-	-	51.18%	-54.76%	-	-	64.34%	-124.70%
All	68.54%	-181.69%	81.09%	-1189.47%	86.40%	-900.00%	84.00%	-1229.41%	75.68%	-164.57%	85.04%	-594.44%	32.69%	-28.81%	86.40%	-1229.41%

As indicated in Table 3-6, the dataset contains extreme outliers, with positive deviations reaching up to 86.4 % and negative deviations as high as -1,229.41 %.

To further illustrate the distribution of proportional differences in weight data across all Members and years, a histogram is presented in **Figure 3-1**. In this figure, the horizontal axis represents the proportion of weight difference between the Market Survey and CTF data, segmented into 2.5 % intervals (0.025), while the vertical axis shows the number of individual SBT records within each interval.

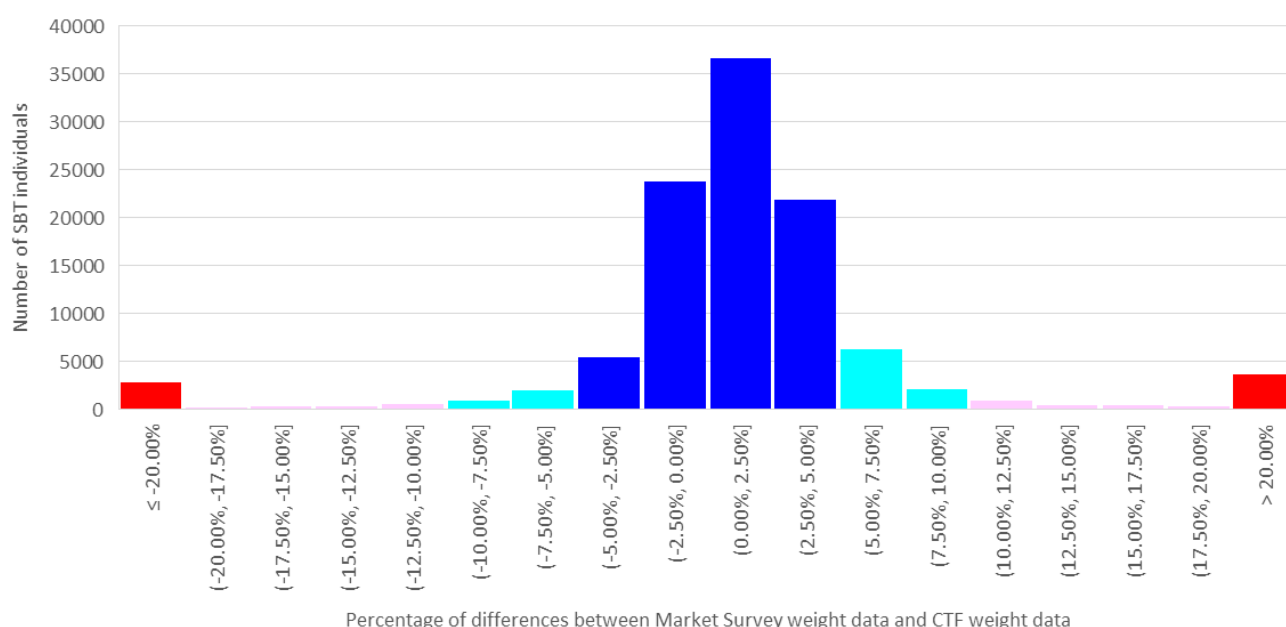


Figure 3-1: Histogram of the percentage of difference between the Market Survey weight data and CTF weight data. The horizontal axis shows the difference between the weight data (2.5 % of interval) and the vertical axis shows the number of SBT individuals. The proportion of differences between the two weights data within $\pm 5\%$ are shown in blue, between $\pm 5-10\%$ in light blue, between $\pm 10-20\%$ in pink and above $\pm 20\%$ in red.

Regarding discrepancies between weights recorded on board and those at landing in the CDS, it is important to note that Japan, Korea, and Taiwan permit a tolerance of $\pm 5\%$ between the onboard weight (as recorded in the CTF) and the landing weight, recognising this as an acceptable margin of error due to onboard weighing conditions. Accordingly, SBT individuals falling within this $\pm 5\%$ range (represented in blue in **Figure 3-1**) can be considered accurately recorded under current CDS operational standards. Notably, 79.94 % of individuals fall within this category.

Conversely, approximately 2,900 individuals exhibit discrepancies exceeding -20% , and around 3,800 exceed $+20\%$, indicating extreme deviations as reflected in **Table 3-6**. These outliers appear in both directions, suggesting instances of both under-reporting and over-reporting by fishers and/or farm operators. If deliberate under-reporting were occurring to avoid quota exceedance, one would expect a skewed distribution toward positive discrepancies. However, the relatively balanced distribution suggests that most extreme records likely stem from unintentional administrative errors, such as data entry mistakes in the Market Survey or inaccuracies within the CTF database. These records may therefore be reasonably classified as statistical outliers.

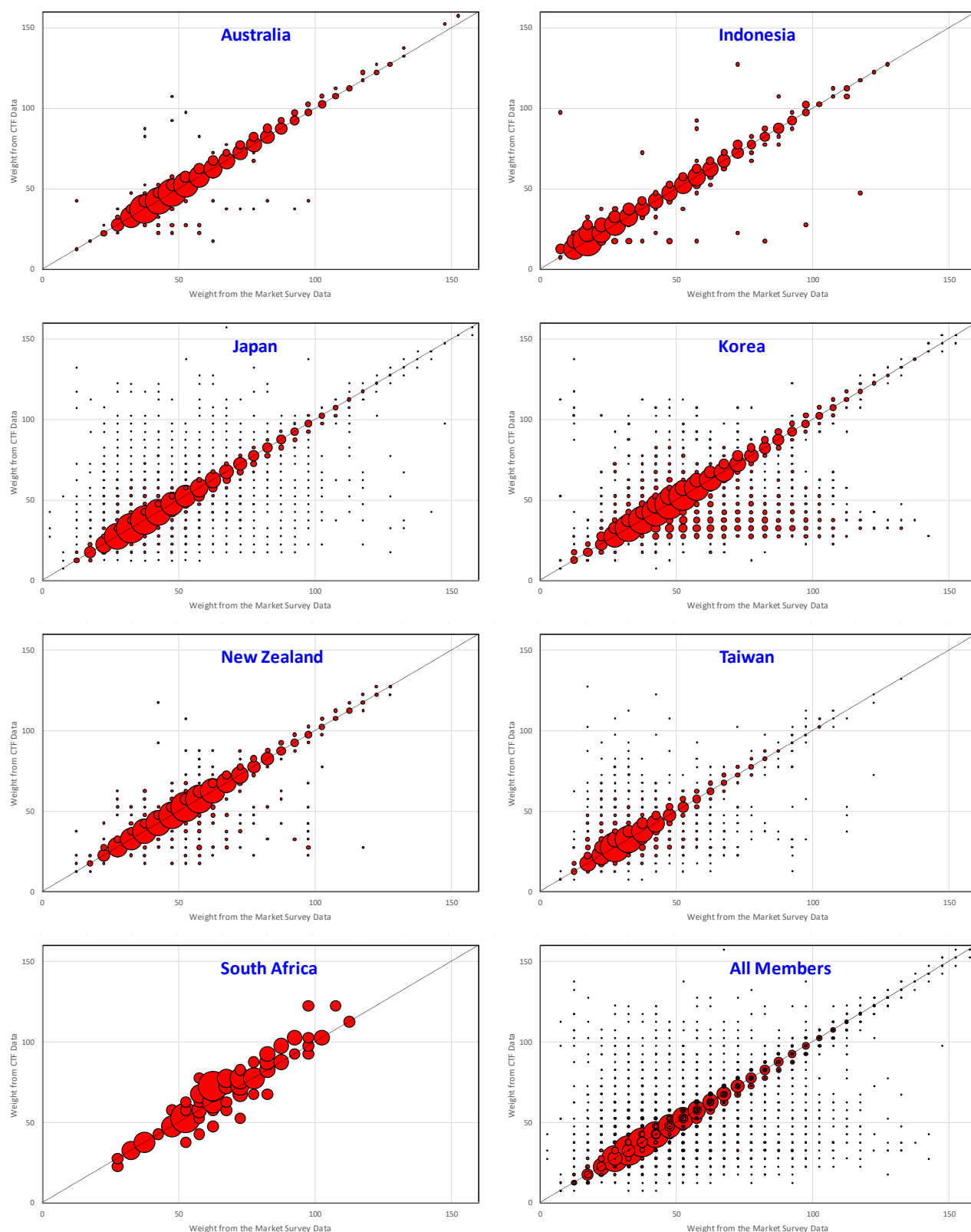
In this context, CC 16 noted that “Outliers above and below 20% could be removed, but there should also be a discussion around improving the data collection mechanisms.” In line with this recommendation, the Secretariat generated a revised dataset excluding records with discrepancies exceeding $\pm 20\%$, corresponding to the red-shaded area in the histogram in **Figure 3-1**. The number of matched records between the Market Survey and CTF datasets by Member, excluding these outliers, is presented in **Table 3-7** below. Consideration of improvements to data collection mechanisms remains a separate but necessary discussion.

Table 3-7. Number of matchings between Market Survey data and CTF data
– all matchings and matchings after excluding outliers by Member.

Member/ CNM	Number of observed tags		Rate
	Number of "matched" tag numbers (A)	Number of matchings after excluding "outliers" (B)	Number of matching within 20% weight difference (B/A)
AU	2,183	2,137	97.89%
ID	642	581	90.50%
JP	78,954	75,525	95.66%
KR	12,612	10,765	85.36%
NZ	3,498	3,343	95.57%
TW	11,651	11,645	99.95%
ZA	98	94	95.92%
total	109,638	102,582	93.56%

As shown in **Table 3-7**, approximately 94 % of matched SBT records fall within the $\pm 20\%$ weight difference range, following the exclusion of outliers beyond this threshold. Of these, roughly 80 % fall within the narrower $\pm 5\%$ range, as illustrated in **Figure 3-1**. Based on these figures, it can be qualitatively stated that the catches reported by Members are reasonably accurate (i.e. within the margin of error allowed by the current CDS operation).

Attachment A



Comparison between weight data from the Market Survey (kg, horizontal axis) and from CTF data (kg, vertical axis). Each bubble in the bubble plot represents the number of records within 5kg bin (i.e. the higher the count, the larger the bubble). Black dotted line indicates 1:1. Note: the scale of bubble size is not the same between graphs as it is relative to total sample size for each Member.

**Analysis for the readability of CDS tags attached to SBT
based on CDS Tag Survey data obtained from Japanese market
(Japanese Market Proposal item G))**

1. Background

The Secretariat has updated Market Analysis Item G) to incorporate the most recent data available through mid-2025. This analysis presents CDS tag readability by Member and may serve as a proxy for assessing the extent to which fishers and operators apply CDS tags correctly.

2. Data used for this analysis

The Secretariat utilised data from the Japanese market CDS Tag Survey conducted in major wholesale markets, as well as from the CCSBT-funded Toyosu Market Survey. Based on these sources, a new dataset was compiled, detailing the total number of observed tags, the number of readable tags, and the proportion of readable tags relative to all observations, as presented in **Table 4-1**.

3. Tag readability since the commencement of CDS

Tag readability by year and by Member since 2010 (commencement of the CCSBT CDS) to mid-2025 is shown in **Figure 4-1**.

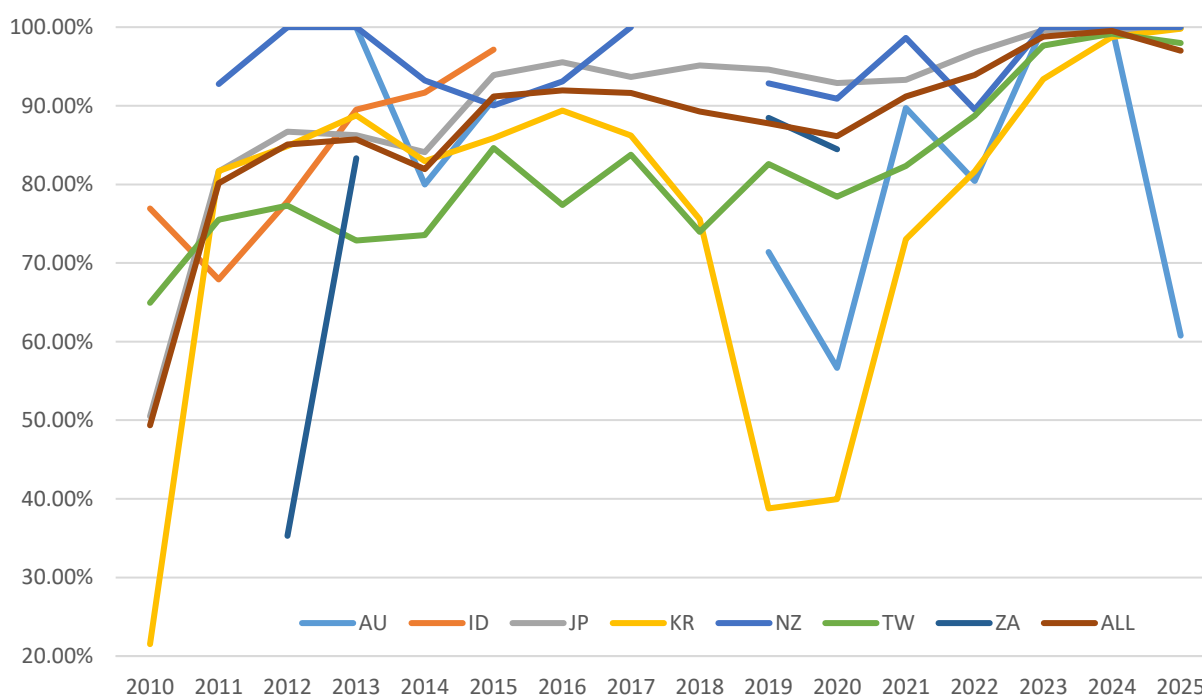


Figure 4-1. Tag readability by year and by Member since 2010 (commencement of the CCSBT CDS).

Overall, tag readability has steadily improved since the inception of the CDS in 2010, maintaining consistently high levels in recent years. Notably, following the revision of tagging instructions for centralised tags in October 2021, most Members have achieved near-complete readability, with rates approaching 100 %.

In the most recent year (2025), Australia’s tag readability was relatively lower (62 of 158 records or 39.2 % were not readable). According to the researcher, many instances of tag detachment from the anal fin were observed, as shown in **Figure 4-2** below.



Figure 4.2: SBT anal fins with CDS tags detached

Currently, the tagging instruction for the [Australian Style Catch Monitoring Tag](#) specifies that “*Members using Australian style tags are encouraged to attach tags at the anal fin, not at the gill cover, to ensure ease of reading the information on the tag (only for fresh SBT. Please see below (Figure 4-3))*”.



Figure 4.3: Instruction on the position of Australian style tag

The recent high rate of tag detachment is likely due to their placement on the soft midsection of the anal fin, rather than the sturdier base part, which makes the fin more prone to tearing.

Fishers using Australian style tags are encouraged to attach tags to fresh SBT closer to the base of the anal fin to ensure greater tag retention.

Table 4-1. Number of observed CDS tags, readable tags and the percentage of readable tags against observed tags since the CCSBT CDS commenced in 2010.

	2010			2011			2012			2013		
	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)
AU	-	-	-	15	15	100.00%	-	-	-	5	5	100.00%
ID	13	10	76.92%	134	91	67.91%	302	235	77.81%	229	205	89.52%
JP	2,119	1,070	50.50%	3,123	2,550	81.65%	3,652	3,166	86.69%	2,860	2,467	86.26%
KR	790	170	21.52%	781	638	81.69%	813	690	84.87%	1,419	1,260	88.79%
NZ	-	-	-	97	90	92.78%	40	40	100.00%	19	19	100.00%
TW	1,215	789	64.94%	1,228	927	75.49%	410	317	77.32%	560	408	72.86%
ZA	-	-	-	-	-	-	34	12	35.29%	6	5	83.33%
ALL	4,170	2,058	49.35%	5,449	4,368	80.16%	5,406	4,600	85.09%	5,177	4,439	85.74%

	2014			2015			2016			2017		
	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)
AU	10	8	80.00%	98	89	90.82%	-	-	-	-	-	-
ID	168	154	91.67%	35	34	97.14%	-	-	-	-	-	-
JP	4,714	3,965	84.11%	5,679	5,334	93.92%	6,794	6,491	95.54%	7,317	6,855	93.69%
KR	1,415	1,174	82.97%	1,083	930	85.87%	1,388	1,241	89.41%	1,453	1,253	86.24%
NZ	59	55	93.22%	161	145	90.06%	29	27	93.10%	5	5	100.00%
TW	1,799	1,323	73.54%	1,523	1,289	84.64%	1,424	1,102	77.39%	925	775	83.78%
ZA	-	-	-	-	-	-	-	-	-	-	-	-
ALL	8,260	6,769	81.95%	8,579	7,821	91.16%	9,635	8,861	91.97%	9,700	8,888	91.63%

	2018			2019			2020			2021		
	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)
AU	-	-	-	318	227	71.38%	503	285	56.66%	816	732	89.71%
ID	-	-	-	-	-	-	-	-	-	-	-	-
JP	8,062	7,670	95.14%	8,693	8,225	94.62%	7,706	7,159	92.90%	8,136	7,590	93.29%
KR	1,579	1,193	75.55%	1,003	389	38.78%	728	291	39.97%	604	441	73.01%
NZ	-	-	-	405	376	92.84%	362	329	90.88%	578	570	98.62%
TW	1,663	1,230	73.96%	1,466	1,211	82.61%	677	531	78.43%	1,070	881	82.34%
ZA	-	-	-	26	23	88.46%	58	49	84.48%	-	-	-
ALL	11,304	10,093	89.29%	11,911	10,451	87.74%	10,034	8,644	86.15%	11,204	10,214	91.16%

	2022			2023			2024			2025		
	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)	Ovserved Records	Readable record	Readability (%)
AU	317	255	80.44%	463	463	100.00%	262	262	100.00%	158	96	60.76%
ID	-	-	-	-	-	-	-	-	-	-	-	-
JP	7,298	7,064	96.79%	4,411	4,394	99.61%	4,419	4,406	99.71%	1,392	1,390	99.86%
KR	747	610	81.66%	830	775	93.37%	1,380	1,363	98.77%	501	500	99.80%
NZ	744	666	89.52%	918	918	100.00%	562	562	100.00%	46	46	100.00%
TW	789	700	88.72%	721	704	97.64%	484	480	99.17%	198	194	97.98%
ZA	11	9	81.82%	-	-	-	17	17	100.00%	-	-	-
ALL	9,906	9,304	93.92%	7,343	7,254	98.79%	7,124	7,090	99.52%	2,295	2,226	96.99%

Distribution of Southern Bluefin Tuna in Japanese and Global markets

The Extended Commission (EC) of CCSBT held in October 2025 analysed the overall situation of Southern Bluefin Tuna (SBT) market as follows.

1. Global Distribution of SBT

<General situation>

According to the information obtained from the Catch Document scheme (CDS), the total amount of SBT that entered Japan's market in 2024 was 14,680.81 tons. This accounts for 78.62 % of all SBT caught or harvested by all CCSBT Members (18,674 tons) in 2024. The proportion of SBT entering Japan decreased by 8.60 % from the previous calendar year.

	SBT entered into Japan (t)	Proportion of SBT sold in Japanese markets (%) against all SBT caught/harvested by all CCSBT Members
2024	14,680.81	78.62%
2023	16,153.09	87.22%
2022	14,821.65	87.47%
2021	15,987.24	88.91%
2020	15,998.06	89.57%

*Data source: CDS

2. Distribution of SBT in Japanese Market

<General situation>

All the SBTs caught by Japanese vessels were landed in Japan in 2024. The SBTs were all frozen, and the amount was 6,505 tons according to the information obtained from CDS. The amount increased by 2.68 % from the previous year. The amount of SBT imported into the Japanese market in the year 2024 is shown below by product type and by exporting Member. In addition, the amount of import of farmed SBT, and the proportion of SBT traded in major markets (Toyosu and Yaizu) are also shown below.

a) Proportion of SBT imported into Japan by product type (2024)

Product Type	Proportions (%)
Fresh Wild	13.37%
Fresh Farmed	52.90%
Frozen Wild	18.87%
Frozen Farmed	14.86%
Total	100.00%

*Data source: CDS

b) SBTs imported into Japan by exporting Member (2024)

Exporting Member	The amount of imported SBTs (t)
Australia	6,764.75
Indonesia	52.34
Korea	945.48
New Zealand	461.18
South Africa	29.09
Taiwan	735.45

*Data source: CDS

c) Imported SBTs farmed in Australia

<General Situation>

In 2024, based on CDS, the total amount of SBT farmed in Australia and exported to Japan was 6,090.47 tons, which represents a decrease of 19.88 % from the previous year.

d) Proportion of SBTs traded in major markets in Japan (2024)

<General Situation>

In 2024, the proportion of SBTs traded in two major markets in Japan, Toyosu (Tokyo) and Yaizu (Shizuoka), among the total amount of SBTs entered Japan was 43.71 % which represents an increase of 4.17 % from the previous year. Please note that the transaction of a SBT that entered Japan in a particular year does not always occur in the same year.

*Data source: CDS data, Statistics of Tokyo Central wholesale market, and Yaizu Fisheries Cooperative Association.

3. Conclusion from comparison and verification between TAC, catch and distribution

- a) Analyses of the available information on the catch by all Members, including CDS data, have detected no over-catch from allocation or TAC in the 2024 fishing season. (From existing analysis; Attachment B of CCSBT-CC/2510/04).
- b) Verification of CDS data, trade statistics, surveys regarding the Japanese market and other data sets indicates no significant discrepancy between such data in relation to the distribution of SBT in the Japanese market in 2024, taking into account elements such as the time lag between catch and import/landing.
- c) There was a significant reduction of SBT imports by Japan from Australia (by 16.32 %) and New Zealand (33.19 %), and it resulted in a 13.73 % decrease from 2023 to 2024 in total.