Commission for the Conservation of
Southern Bluefin Tuna

みなみまぐろ保存委員会

CCSBT-CC/2610/15

Secretariat's Japanese Market Analyses 2026
事務局による 2026 年日本市場解析
(CC 議題項目 8.1)

1. Background
背景

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):
CCSBT メンバーが 2023 年の第 6 回戦略・漁業管理作業部会会合（SFNWG 6）において日本市場提案を承認して以来、事務局は以下の解析を実施し、遵守委員会（CC）に対して解析の結果を提出してきたところである。

A) Catches of each Member and its exports to Japan by fishing seasons, using CDS, national reports of catch, and trade statistics;
CDS、漁獲量の国別報告及び貿易統計を用いた、漁期ごとの各メンバーの漁獲量と日本への輸出量

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;
CDS、管理標識調査及び貿易業者への質問票を用いた、製品タイプ別（生鮮天然、生鮮蓄養、冷凍天然及び冷凍蓄養）の日本市場での輸入量の割合（対応関係アプローチ#1）

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.
CDS、管理標識調査及び貿易業者への質問票を用いた、日本に水揚げ及び輸入された SBT のうち主要市場（豊洲及び焼津）で販売された SBT（冷凍天然、冷凍蓄養及び生鮮蓄養）の割合（対応関係アプローチ#3）

D) Import of farmed SBT from Australia into Japan (Correspondence Approach #4), using CDS and FRDC Seafood Production and Trade Databases;
CDS 及び FRDC Seafood Production and Trade Databases を用いた、オーストラリアから日本への蓄養 SBT の輸入量（対応関係アプローチ#4）

E) Imports (Fresh and Frozen) by each Member (Correspondence Approach #2), using CDS and trade statistics; and
CDS 及び貿易統計を用いた、各メンバー別輸入量（生鮮及び冷凍）（対応関係アプローチ#2）

F) Comparison between weight data of individual SBTs, using CDS and management tag survey;
CDS 及び管理標識調査を用いた、個別 SBT の重量データ間の比較

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.
管理標識調査を通じて蓄積された情報を用いた、CDS 標識の判読可能性の改善状況の確認と CDS 標識の仕様を改善する必要性のレビュー

The 20th Meeting of the Compliance Committee (CC 20) in 2025 agreed to categorise the above items into Category 1 (Item A-E, aimed at monitoring and detecting sudden market changes (corresponding approach proposed by the market expert in 2019) and Category 2 (Item F and G, designed to verify Members' implementation status and accuracy of measures). CC 20 also agreed to conduct the Category 1 analysis annually, and the Category 2 analysis on a three-year cycle (the next iteration scheduled for 2028).
2025 年に開催された第 20 回遵守委員会会合（CC 20）は、上記の解析項目をカテゴリ 1（急激な市場の変化をモニタリング及び検知することを目的とする解析項目 A-E（2019 年に市場専門家が提案した対応関係アプローチ））及びカテゴリ 2（メンバーによる措置の実施状況及び正確性を検証するべく設計された解析項目 F 及び G）に分類することに合意した。また CC 20 は、カテゴリ 1 解析は毎年、またカテゴリ 2 解析は 3 年サイクル（次回解析は 2028 年に実施予定）で実施することに合意した。

In accordance with the CC Workplan, the Secretariat conducted the specified analyses, and the outcomes are summarised below.
事務局は、CC 作業計画に従って指定された解析を実施したところ、その結果を以下に総括する。

2. Results of Japanese Market Analyses (Category 1 analysis items) in 2026
2026 年における日本市場解析（カテゴリ 1 解析項目）の結果

(i) Item A) – D) on SBTs in Japanese Market
日本市場における SBT に関する解析項目 A) - D)

The Secretariat updated the analyses in accordance with the format endorsed in 2023, as presented in **Appendix 1**.
2023 年に承認された様式に従って事務局が更新した解析結果を**別添 1** に示した。

Where necessary, adjustments were made to the original format and dataset to accommodate data availability and address potential confidentiality concerns.
データの利用可能性に対応するとともに潜在的な機密保持上の懸念に対処するため、必要に応じて当初のフォーマット及びデータセットに調整が加えられている。

The key points of this year's analysis results are summarised below.
本件の解析結果のうち重要なポイントを以下に総括する。

Discrepancies in SBT import to Japan between CDS and JMOF
日本による SBT 輸入量にかかる CDS と JMOF の不整合

Regarding the quantity of SBT imported into Japan in 2025, substantial discrepancies were observed between the CDS and JMOF records (particularly for Korea, where the CDS figure was 265 t or 18.54% lower than JMOF, and for Taiwan, where the CDS figure was 221 t or 22.21% higher than JMOF). Although the amount for Indonesia and South Africa were relatively small, there were large proportional discrepancies between the CDS and JMOF records (28 t or 184.20% and 8 t or 52.08%, respectively).
2025 年に日本に輸入された SBT の数量に関して、CDS と JMOF（日本貿易統計）の

記録の間に大きな不整合が認められた（特に韓国に関しては CDS 上の輸入量が JMOF より 265 トン（18.54 %）低くなっており、台湾は CDS 上の輸入量が JMOF より 221 トン（22.21 %）高くなっている）。インドネシア及び南アフリカは数量ベースでは CDS と JMOF の差異が比較的小さいものの、割合ベースで見た場合は大きな不整合（それぞれ 28 トン又は 184.20 %、8 トン又は 52.08 %）が認められる。

These discrepancies are likely attributable, at least in part, to differences in the timing of export (the CDS records used here are based on the year of landing in Japan and the year of export to Japan) and the timing of import after shipment (the basis of JMOF). However, the results do not suggest that SBT entering the Japanese market exceeded the SBT catch amounts reported by Members (i.e., they do not indicate overcatch).
これらの不整合は、（少なくともその一部は）輸出のタイミング（ここで用いている CDS 記録は、日本に水揚げされた年及び日本向けに輸出された年がベースとなっている）と荷出し後の輸入のタイミング（JMOF は輸入時点がベースとなっている）のズレに起因するものと考えられる。しかしながら、今回の解析結果からは、日本市場に流入した SBT の数量がメンバーから報告された SBT 漁獲量を超過したことは示唆していない。

Proportion of SBT imports by Product type
製品タイプ別 SBT 輸入量の割合

Product-type analysis of imported SBT in 2025 shows that the proportion of “Fresh Wild” SBT imports declined consistently across all three data sources (CDS, tag survey, and the questionnaire to trade companies). This reflects both the lower catch by New Zealand in 2025 (which resulted in a substantial decrease in exports to Japan) and the increase in frozen SBT exports from Korea and Taiwan to Japan.
2025 年に実施した輸入 SBT の製品タイプ別解析では、三つのデータソース（CDS、タグ調査及び貿易企業からのアンケート調査）横断的に、輸入 SBT のうち「生鮮・天然」の割合が一様に低下したことが示唆されている。この結果は、2025 年におけるニュージーランドの漁獲量が少なかったこと（ひいては日本への輸出量の大幅減少につながったこと）、及び韓国及び台湾から日本への冷凍 SBT 輸出量が増加したことの両方を反映している。

The results also show opposite trends in the proportions of “Fresh Farmed” and “Frozen Farmed” SBT between the CDS and the trade-company questionnaire. This is considered to stem from the same underlying factors as those identified in Analysis Item E.
また、今回の解析結果では、CDS と貿易企業へのアンケート調査との間で、「生鮮・蓄養」と「冷凍・蓄養」の割合が逆のトレンドを示している。この結果は、解析項目 E において確認されたものと同様の根本的要因に起因するものと考えられる。

Import of farmed SBT from Australia into Japan (Correspondence Approach #4)
オーストラリアの蓄養 SBT の日本での輸入（対応関係アプローチ #4）

As shown in Table 1.4 in Appendix 1, there is a substantial discrepancy between the quantities of SBT exports to Japan recorded in the CDS and those recorded by FRDC in 2025 (971 t or 12.44% on a CDS basis). Unlike the differences observed in JMOF records, both CDS and FRDC are based on export timing and should therefore show a high degree of consistency. Relatively large discrepancies were also observed in 2022 and 2020.
別添 1 の表 1.4 に示したとおり、2025 年において CDS 上で記録された日本への SBT

輸出量と FRDC により記録された数量との間には大きな乖離（CDS をベースとすると 971 トン、12.44 %）がある。JMOF 記録に観察された差異とは異なり、CDS 及び FRDC はいずれも輸出時点のタイミングをベースとしており、したがって両者の一貫性は高くなるはずである。2022 年及び 2020 年にも比較的大きな乖離が観察されている。

The 2025 SBT export volume recorded by FRDC does not exceed Australia's estimated total catch/harvest for 2025 (9,617.21 t, Attachment C of CCSBT-CC/2610/04), and therefore does not immediately raise concerns of non-compliance. However, this discrepancy warrants continued attention.
2025 年に関して FRDC が記録した SBT 輸出数量は、オーストラリアの 2025 年における推定総漁獲／収穫量（9,617.21 トン、文書 CCSBT-CC/2610/04 別紙 C のとおり）を超過してはおらず、したがって本件が直ちに非遵守の懸念を惹起するものではないものの、この乖離については引き続き注視していく必要がある。

(ii) Item E): Imports (Fresh and Frozen) by each Member (Correspondence Approach #2), using CDS and trade statistics
解析項目 E）：CDS 及び貿易統計を用いた、各メンバー別輸入量（生鮮及び冷凍）（対応関係アプローチ#2）

The Secretariat updated this analysis, originally conducted in 2023, by incorporating the latest available data through 2025. The results are presented in **Appendix 2**.
事務局は、2023 年に初めて実施された解析に 2025 年までの最新の利用可能なデータを加える形で本解析を更新した。解析の結果は**別添 2** のとおりである。

In principle, CDS and JMOF figures should align closely for both fresh and frozen SBT imports into Japan. However, the result shows significant discrepancies persist in the reported quantities of both product types.
基本的に、CDS と JMOF の両者に記録された日本に輸入される生鮮 SBT 及び冷凍 SBT の数量はほぼ一致するはずである。しかしながら、解析の結果では両方の製品タイプの報告数量に大幅な乖離がある状況が続いていることが示唆されている。

This issue has been raised since 2023 and 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. At CC 20 in 2025, the Secretariat noted that, in the Secretariat's understanding, SBT from Australian farms is fresh at the time of export (CMF validation) but becomes frozen during transit and is imported into Japan in a frozen state, and this shift contributes to discrepancies between the CDS and Japan's trade statistics. The Secretariat also noted that, as the CDS Resolution does not specify how post-export changes in product type should be recorded, current practices are not considered non-compliant[1]. However, if trade statistics show significant discrepancies relative to CDS import/export volumes, further investigation with the concerned Members may be warranted.
この問題は 2023 年から指摘されており、これは主に、相当量のオーストラリア冷凍 SBT が CDS では生鮮として記録されているのに対し、日本の貿易統計では冷凍として区分されていることに起因するように見受けられる。事務局は、2025 年の CC 20 において、オーストラリアの蓄養場由来の SBT は輸出時点（CMF が「確認」され

[1] Changes in product following export is discussed further in CCSBT-CC/2610/11.　輸出後の製品タイプの変化については文書 CCSBT-CC/2610/11 でさらに検討している。

るタイミング）では生鮮の状態であるが、輸送中に冷凍状態となり、日本では冷凍 SBT として輸入されるという状態変化が原因で CDS と日本貿易統計との間に乖離が生じているとの事務局の理解を述べた。また事務局は、CDS 決議では輸出後の製品タイプの変化をどのように記録すべきかを規定していないため、現行の運用は非遵守に当たらないとの考えを述べた。ただし、貿易統計が CDS の輸出入量と著しい乖離を示している場合は、関係するメンバーとのさらなる調査が必要となる可能性がある。

As noted in the section above, in the most recent year (2025), notable discrepancies remain between CDS and JMOF figures, particularly for Korea and Taiwan. For Indonesia and South Africa, although there was a large percentage divergence between the two statistics, the overall quantities were relatively small.
先のセクションでも述べたとおり、直近年（2025 年）においては、特に韓国と台湾について CDS と JMOF の記録の間に顕著な不整合が認められる。インドネシア及び南アフリカに関しては、全体的な数量としては比較的小さいものの、割合ベースでは 2 つの統計値の間に大きな乖離がある。

3. Conclusion and Publication of the results of the analyses
まとめ及び市場解析の結果の公表

Based on verification of CDS, trade statistics, various survey results for the Japanese market, and other data sources, some discrepancies were detected in Japan's SBT import quantities. However, the amount of SBT entering the Japanese market did not exceed the catch amounts reported by Members, and, taking into account factors such as the time lag between export and import, no serious issues requiring immediate action were identified.
CDS、貿易統計、日本市場に関する各種の調査結果及びその他のデータソースを検証した結果、日本による SBT の輸入数量にはデータソース間でいくらかの不整合が検知された。しかしながら、日本市場に流入した SBT の数量はメンバーが報告した総漁獲量を超過しておらず、また輸出と輸入の間のタイムラグといった要因を踏まえれば、即時の行動を要するような深刻な問題は特定されなかった。

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 3**. These represent simple updates to CCSBT-CC/2510/16 and reflect the analyses undertaken during the current year.
拡大委員会による従前の決定に従い、事務局は、承認されたフォーマットによる市場解析結果のサマリーを**別添 3** のとおり更新した。これらの概要は CCSBT-CC/2510/16 を単純更新したもので、本年に実施した解析結果を反映している。

4. Action Required
要請されている行動

CC 21 is invited to:
CC 21 は以下を招請されている。

- Note the information presented in **Appendix 1 - 2** of this paper;
  本文書**別添 1** 及び**別添 2** に示した情報に留意すること。

- If necessary, provide specific guidance for the Secretariat to improve the current analyses; and
  必要に応じて、事務局に対して現行の解析を改善するための具体的なガイダンスを提示すること。
- Recommend the EC to publish **Appendix 3** of this paper, which summarises the outcome of the Japanese market analyses this year.
  EC に対し、本年の日本市場解析の結果を総括した本文書**別添 3** を公表するよう勧告すること。

Prepared by the Secretariat
事務局作成文書

別紙は英語版のみ

Appendix 1

Result of Japanese Market Analyses in 2026 for Analysis 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 2025 (or mid-2026 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: 2025

Member	Import to/landed in Japan which occurred in Calendar year 2025[*1]	Export to/Landed in Japan which occurred in Calendar year 2025[*2]	Catch in Fishing year[*3]
Japan	-	7,374.76	7,458.00
Australia	8,607.90	8,504.72	6,342.00
Indonesia	15.44	43.88	1,172.00
Korea	1,428.03	1,158.80	1,495.00
New Zealand	341.58	343.19	679.60
South Africa	15.55	23.65	226.46
Taiwan	995.85	1,217.04	1,594.00

[*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. Figures for Australia include both farmed and wild SBT.

[*3] Annual 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 by product types (Correspondence Approach #1)

Table 1.2-1: Proportion of Imports by Product Type

Calendar year: 2025

	Proportion of Imports (%)		
	CDS [*1]	CDS Tag Survey [*2]	Questionnaire to trade companies [*3]
Fresh Wild	9.51%	24.89%	10.62%
Fresh Farmed	55.93%	0.00 %	0.36%
Frozen Wild	21.36%	75.11%	24.18%
Frozen Farmed	13.21%	0.00 %	64.84%

[*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 2024 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]
2025	61.12 %	45.75 %	Data Not Available
2024	62.19 %	37.97 %	53.44 %
2023	64.61 %	34.14 %	60.10 %
2022	66.90 %	22.53 %	67.17 %
2021	64.93 %	25.39 %	60.08 %

[*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 2024 data (The 2024 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]
2025	18,832.14	7,550.41	40.09 %	85.93 %
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 %

[*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.metro.tokyo.lg.jp/torihiki/geppo

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]
2025	7,808.95	8,780.32
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

[*1] Data source: CDS. Amounts of exports of SBT from Australia into Japan. This figure shows only farmed SBT and is different from the figure in Table 1.1, which includes wild SBT caught by other fisheries.

[*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.

Discussion

Please see Section 2-(i) of the main text (page 1-2 of this paper).

Appendix 2

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 2025.

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 (2010-2025 calendar year); and
2) Japan's official SBT trade statistics (2010 - 2025 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
2025	7,012.47	698.39	17.20	15.44	-	-	343.19	341.58	-	-	18.18	15.55

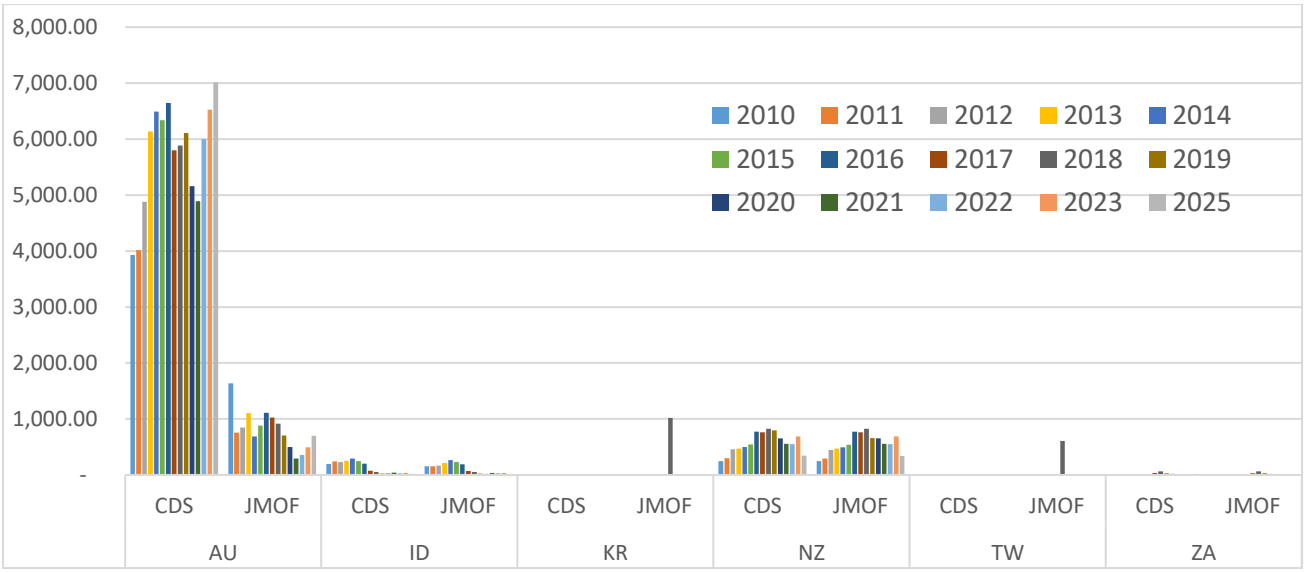


Figure 2-1: Visual comparison of Fresh SBT quantities entering Japan as an Import by Member and by Year

A comparison of 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	-	731.62	761.00	-	-
2025	1,492.26	7,909.51	26.69	-	1,163.27	1,428.03	-	-	1,217.04	995.85	5.47	-

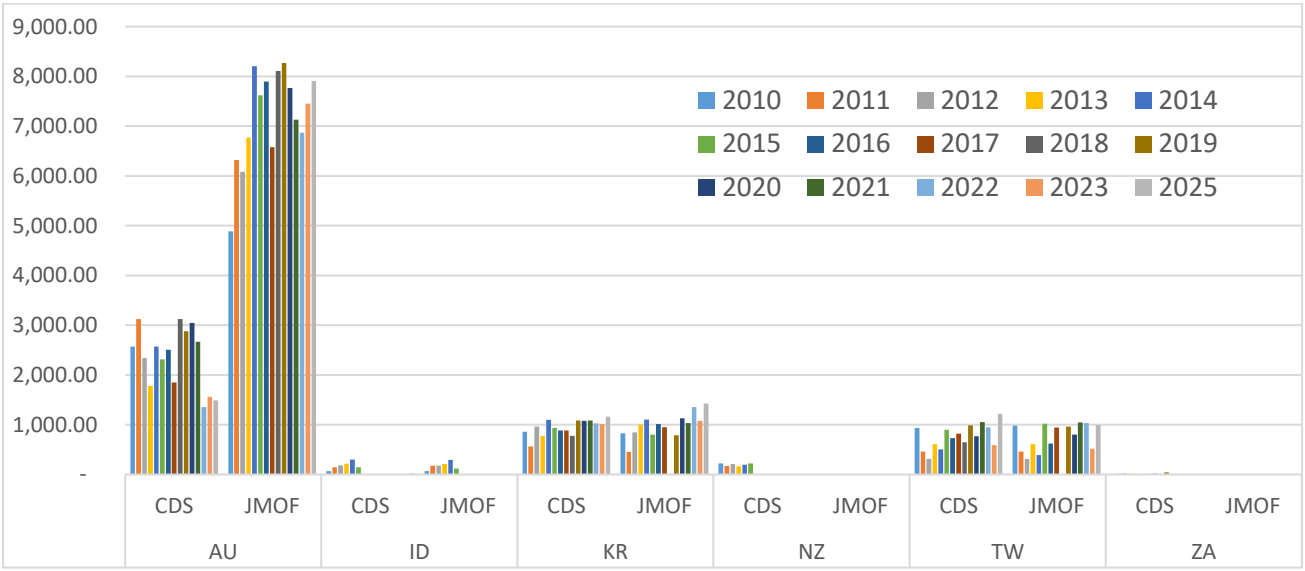


Figure 2-2: Visual comparison of Frozen SBT quantities entering Japan as an Import by Member and by Year

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	731.62	761.00	29.09	28.83
2025	8,504.72	8,607.90	43.88	15.44	1,163.27	1,428.03	343.19	341.58	1,217.04	995.85	23.65	15.55

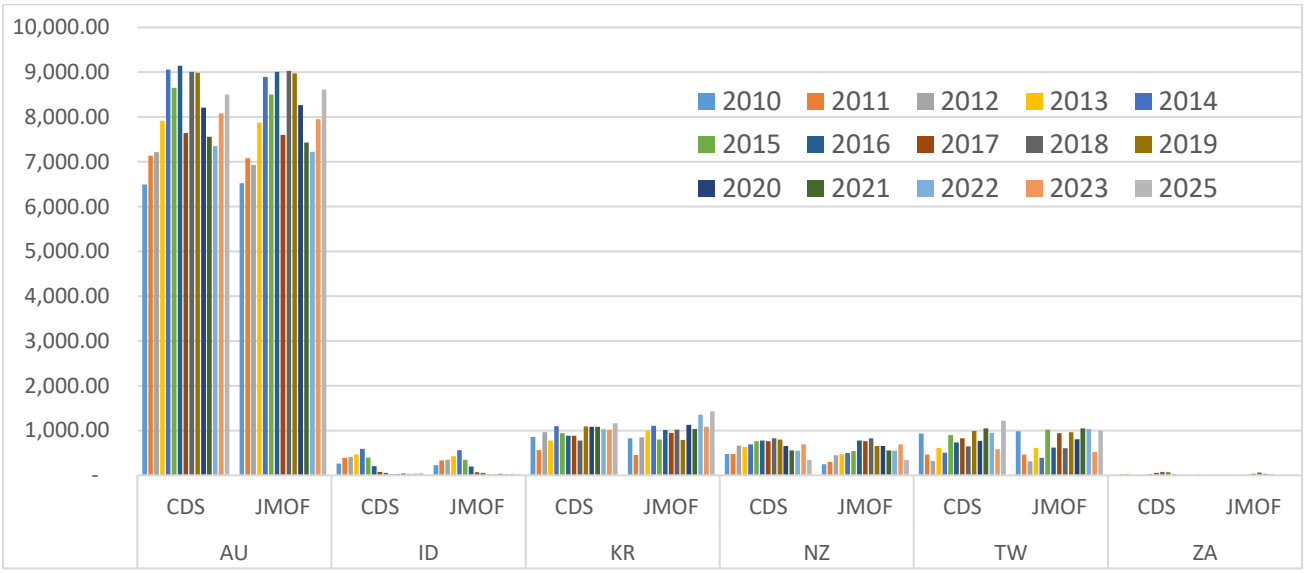


Figure 2-3: Visual comparison of Fresh + Frozen SBT quantities entering Japan as an Import by Member and by Year

Discussion

Please see Section 2-(ii) of the main text (page 2-3 of this paper).

Appendix 3

Distribution of Southern Bluefin Tuna in Japanese and Global markets

The Extended Commission (EC) of CCSBT held in October 2026 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 2025 was 18,832.14 tons. This accounts for 85.93 % of all SBT caught or harvested by all CCSBT Members (21,916 tons) in 2025. The proportion of SBT entering Japan increased by 7.31 % 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
2025	18,832.14	85.93%
2024	14,680.81	78.62%
2023	16,153.09	87.22%
2022	14,821.65	87.47%
2021	15,987.24	88.91%

*Data source: CDS

2. Distribution of SBT in Japanese Market

<General situation>

All the SBTs caught by Japanese vessels were landed in Japan in 2025. The SBTs were all frozen, and the amount was 7,374.76 tons according to the information obtained from CDS. The amount increased by 13.38 % from the previous year. The amount of SBT imported into the Japanese market in the year 2025 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 (2025)

Product Type	Proportions (%)
Fresh Wild	9.51%
Fresh Farmed	55.93%
Frozen Wild	21.36%
Frozen Farmed	13.21%
Total	100.00%

*Data source: CDS

b) SBTs imported into Japan by exporting Member (2025)

Exporting Member	The amount of imported SBTs (t)
Australia	8,504.72
Indonesia	43.88
Korea	1,163.27
New Zealand	343.19
South Africa	23.65
Taiwan	1,217.04

*Data source: CDS

c) Imported SBTs farmed in Australia

<General Situation>

In 2025, based on CDS, the total amount of SBT farmed in Australia and exported to Japan was 7,808.95 tons, which represents an increase of 28.22 % from the previous year.

d) Proportion of SBTs traded in major markets in Japan (2025)

<General Situation>

In 2025, 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 40.09 % which represents a decrease of 3.72 % from the previous year. Please note that the transaction of an 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 2025 fishing season. (From existing analysis; Attachment B of CCSBT-CC/2610/04).

b) Based on verification of CDS, trade statistics, various survey results for the Japanese market, and other data sources, some discrepancies were detected in Japan's SBT import quantities. However, the amount of SBT entering the Japanese market did not exceed the catch amounts reported by Members, and, taking into account factors such as the time lag between export and import, no serious issues requiring immediate action were identified.