

2003年漁期における日本のミナミマグロ漁業のレビュー

(2003年漁期は現在継続中なので暫定版)

1. 概要

- (1) 我が国の2003年漁期(2003年3月1日から2004年2月28日)におけるミナミマグロの漁獲量は、9月20日現在で4,641トンとなっている。
- (2) 長引く不況による需要の落ち込み、及び、引き続き高水準にあるまぐろ類の輸入を原因とする魚価の低迷により、我が国の遠洋まぐろはえ縄漁業は厳しい経営を余儀なくされている。

2. 操業規制

- (1) 我が国政府は、CCSBTで合意したTAC及び国別配分に基づいて、各年漁期のミナミマグロの漁獲を管理している。
- (2) 本年漁期の漁獲枠について合意がなかったため、暫定的な漁獲枠6,065トンから、2001年の自主規制枠6,065トンに対する超過量226トン差し引いた5,839トンとして2003年漁期の操業を開始している。
- (3) また、産卵場や小型魚の保護のため、操業禁止区域・期間を設けて、操業管理を行っている。
- (4) 業界は、業界の自主規制により、タスマン・シドニー沖公海、ケープ沖公海、南インド洋公海の3海域それぞれについて、操業開始日を設定するとともに、区分された3海域毎の操業船の数を制限している。

3. 漁獲量と努力量(別添1参照)

2003年漁期のミナミマグロの漁獲を目的とした操業は、タスマン・シドニー沖公海については53隻の操業船が1,556トンの漁獲で操業を終了し、ケープ沖公海については105隻の操業船(ミナミマグロを目的に操業することを認められた106隻の選定船のうち1隻は操業しなかった。)が2,836トンの漁獲で操業を終了した。南インド洋公海の操業は、現在もなお継続中である。

4. 過去の漁獲量と漁獲努力(別添1参照)

- (1) 1999年漁期も、委員会でTACの合意が得られなかったため、日本政府は、1997年に合意した我が国の国別配分量である6,065トンにより自主的に漁獲量規制を行った。しかしながら、1999年に我が国が自主的に実施した調査漁獲に対するITLOSからの暫定措置命令に従って、漁獲量を711トン削減し、5,354トンとした。
- (2) 2000年漁期についても、日本政府は、1997年に合意した我が国の国別配分量である6,065トンから1,487トン差し引いた4,578トンの漁獲量規制を行った。しかしながら、2000年8月に暫定措置命令はその効力を失ったため、2000年9月に、この自主規制量を6,065トンに変更した。実際の漁獲量は6,027トンであった。
- (3) 2001年漁期の操業は、暫定的な漁獲枠を6,065トンとして開始したが、日本政府は、関係加盟国との協議の後、6,421トンの自主規制枠を設定した。2001年漁期の実際の漁獲量は6,647トンであった。

(4) 2002年の操業は、これまでに引き続き6,065トンで自主的に漁獲量規制を行ったが、実際の漁獲量は6,192トンであった。

5. 漁船勢力とその分布 (別紙1参照)

2003年漁期にミナミマグロを目的に操業することを認められた選定船の数は221隻である。このうち、タスマン・シドニー沖公海は53隻、ケープ沖公海は106隻(このうち1隻は操業しなかった。)、南インド洋公海63隻である。

6. 過去の漁船勢力とその分布 (別紙1参照)

- (1) 1998年漁期までは、各年257隻が操業した。
- (2) 1999年漁期については、FAOで合意された行動計画に基づき、我が国の遠洋まぐろはえ縄漁船の2割減船を実施したことに伴い、(1998年漁期の操業船隻数から30隻縮小した)227隻が操業した。
- (3) 2000年漁期については、ITOLSの暫定措置命令に従って漁獲枠を縮小したことに伴い、ミナミマグロの漁獲を目的として操業する隻数を172隻に縮小した。しかしながら、暫定措置命令はその効力を失ったため、9月以降、漁獲枠を追加したことに伴い、27隻を追加した199隻が操業した。
- (4) 2001年及び2002年漁期は、それぞれ227隻が操業した。

7. 漁業管理

- (1) ミナミマグロの漁獲量管理のために、業界に対する政府の告示によって、10日毎の漁獲数量の報告を義務付けている。
- (2) また、VMSの漁船への設置と、これを利用した政府への毎日の操業位置報告を義務付けるとともに、漁場への監視船の派遣、操業船へのオブザーバー乗船を含む、必要な漁業管理、モニタリング措置を実施している。
- (3) 2003年漁期は、3隻の取締船が漁場に派遣され、操業のモニターのために延べ16名のオブザーバーが乗船している。

8. その他

(我が国のミナミマグロ輸入状況については別紙2参照)

- (1) 1993年~1998年にかけて、我が国のミナミマグロ輸入量は大幅に増加した。1998年以降の輸入量は(製品重量で)1万トン強で安定している。
- (2) 2002年の我が国のミナミマグロ輸入量は(製品重量で)10,866トンであった。輸入国は8カ国まで減少し、輸入量の上位5ヶ国(1位:豪州、2位:台湾、3位:韓国、4位:NZ、5位:インドネシア)からの輸入量は全体の97.7%を占めている。
- (3) 日本のミナミマグロの輸入量の第1位である豪州は、毎年、確実に輸出量を拡大しており、2001年には(製品重量で)8,237トンに達した。この量は、日本のミナミマグロ輸入総量の75.8%を占めている。

Review of Southern Bluefin Tuna Fisheries of Japan in the 2003 Fishing Season

(Provisional since the 2003 fishing season has not completed.)

1. Introduction

- (1) The total amount of catch of SBT for the 2003 fishing season (1 March 2003 - 28 February 2004) was 4,641tons at 20 September 2003.
- (2) Japanese distant-water tuna longline fishery has been facing a severe economic situation due to a fall in the price of tuna caused by a decline in demand for tuna because of the long recession in Japan and the continued high level of import of tuna.

2. Operational Constraints on Effort

- (1) GOJ is managing the catch of SBT for each fishing season based on TAC and national allocations agreed by CCSBT.
- (2) Fishing operations for the 2003 fishing season have been started with catch limit of 5,839tons, which is reduced 226tons from a tentative catch limit of 6,065tons, since no agreement was reached for this season.
- (3) Further, GOJ is managing the fishing operations by introducing the time/area closure in order to protect the spawning grounds and juveniles.
- (4) The industry sets voluntary starting days for three sub-fishing areas (high seas area off Tasmania/Sydney, high seas area off Cape Town and Southern Indian Ocean), and limits the total number of vessels for each sub-fishing area.

3. Catch and Effort (refer to Appendix 1)

In the 2003 fishing season, the fishing operations in the high seas area off Tasmania/Sydney and off Cape Town have been closed with the catch of 1,556tons by 53 vessels and 2,836tons by 106 vessels (1 vessels within 107 vessels which had been selected for targeting SBT did not operate), respectively. The operations in the Southern Indian Ocean are still undertaken.

4. Historical Catch and Effort (refer to Appendix 1)

- (1) In the 1999 fishing season, GOJ originally took the same voluntary measures as for the 1998 fishing season, in the absence of a decision on TAC by the Commission. However, following the prescription of provisional measures by ITLOS concerning the experimental fishing conducted by Japan, the actual catch in the 1999 season was reduced by 711tons to 5,354tons.
- (2) In the 2000 fishing season, GOJ set the voluntary catch limit of 4,578tons, 1,487tons less than 6,065tons, which was the national allocation to Japan agreed in 1997. However, since the provisional measures prescribed by ITLOS was revoked in August 2000, the voluntary catch limit was changed to 6,065tons in September 2000. The actual catch in the 2000 season was 6,027tons.
- (3) In the 2001 fishing season, fishing operations were started with a tentative catch limit of 6,065tons and GOJ set the voluntary catch limit of 6,421tons after the consultation with the relevant Members. The actual catch in the 2001 season was 6,647tons.

- (4) In the 2002 fishing season, fishing operations were started with a tentative catch limit of 6,065tons, and the actual catch was 6,192tons.

5. Annual Fleet Size and Distribution (refer to Appendix 1)

The number of fishing vessels selected for targeting SBT in the 2003 fishing season was 221. The number of vessels on the high seas off Tasmania/Sydney was 53, the number of vessels on the high seas off Cape Town was 10699 (1 of which did not operate), and the number of vessels in Southern Indian Ocean was 63.

6. Historical Fleet Size and Distribution (refer to Appendix 1)

- (1) Until the end of the 1998 fishing season, 257 fishing vessels operated for each year.
- (2) In the 1999 fishing season, 227 fishing vessels (30 vessels less than the 1998 fishing seasons) operated, since Japan cut the number of distant-water tuna longliners based on the Plan of Action agreed by FAO.
- (3) In the 2000 fishing season, the number of vessels for SBT was reduced to 172 in accordance with the reduction of the catch limit based on the provisional measures prescribed by ITLOS. However, since the provisional measures were revoked, 199 vessels, 27 vessels more than the original, operated for SBT based on the increase of the catch limit in September.
- (4) In the 2001 and 2002 fishing season, the number of vessels for SBT was restored to the 1999 fishing season level, which was 227.

7. Fisheries Monitoring

- (1) GOJ issued a notification to the industry that SBT catch should be reported every 10days for the management of the catch limit.
- (2) GOJ took necessary measures to control and monitor the fishery, which include dispatching enforcement vessels to the fishing area, observers on board of operating vessels, as well as requirement for fishing vessels to install VMS on board vessels and to report a daily position to GOJ.
- (3) In the 2003 fishing season, 3 enforcement vessels were/will be dispatched to the fishing ground, and the number of observers to monitor the operation on board were/will be 16.

8. Others factors (refer to Appendix 2 for Japanese import of SBT)

- (1) From 1993 to 1998, the amount of SBT imported to Japan had significantly increased. Since 1998, the amount of SBT import has been stable at around just over 10,000tons (product weight).
- (2) The amount of import of SBT in 2002 was 10,866tons (product weight). The number of import country was reduced to 8, and import from the biggest 5 exporting country/entities (1: Australia, 2: Taiwan, 3: Republic of Korea, 4: New Zealand, 5: Indonesia) accounts for 97.7% of the total.
- (3) Import from Australia, the biggest exporting country/area of SBT to Japan has increased its export of SBT steadily, reaching 8,237tons (product weight) in 2001. This amount of SBT accounts for 75.8% of the total import of SBT to Japan.

Trend in catch and fishing effort in SBT fisheries by Japan

		total	vessels selected for targeting SBT			others	
			high seas off Tasmania/Sydney	high seas off Cape Town	high seas in Southern Indian Ocean	by-catch only	
1998	allocation of catch by area	6,065mt	1,350mt	2,600mt	2,115mt	-	
	actual catch	6,038mt	1,313mt	2,759mt	1,893mt	73mt	
	numbers of vessels	-	82vessels	110vessels	65vessels	-	
	fishing period	-	from April 21 to July 31	from May 1 to August 10	from September 5 to December 5	from March 1 to February 28	
1999	allocation of catch by area	6,065mt	1,720mt	3,000mt	1,345mt	-	
	actual catch	5,354mt	1,539mt	2,513mt	1,113mt	189mt	
	numbers of vessels	-	69vessels	99vessels	59vessels	-	
	fishing period	-	from April 15 to May 31 from July 1 to August 10	from May 1 to August 10	from September 1 to December 1	from March 1 to February 29	
2000	allocation of catch by area (**1)	original	4,578mt	1,298mt	2,265mt	1,015mt	-
		revised	6,065mt	1,298mt	2,265mt	2,502mt	-
	actual catch	6,027mt	1,260mt	2,235mt	2,400mt	132mt	
	numbers of vessels (**2)	original	-	52vessels	75vessels	45vessels	-
		revised	-	52vessels	75vessels	72vessels	-
	fishing period	-	from April 15 to August 1	from May 1 to August 1	from September 1 to December 27	from March 1 to February 28	
2001	allocation of catch by area (**3)	tentative	6,065mt	1,720mt	3,000mt	1,345mt	-
		revised	6,421mt	1,850mt	3,226mt	1,345mt	-
	actual catch	6,647mt	1,816mt	3,212mt	1,594mt	25mt	
	numbers of vessels	tentative	-	69vessels	99vessels	59vessels	-
		revised	-	69vessels	99vessels	59vessels	-
fishing period	-	from April 15 to July 16	from May 1 to August 2	from September 1 to November 29	from March 1 to February 28		
2002	allocation of catch by area (tentative)	6,065mt	1,720mt	3,000mt	1,345mt	-	
	actual catch	6,192mt	1,960mt	3,312mt	854mt	66mt	
	numbers of vessels	-	69vessels	96vessels	59vessels	-	
	fishing period	-	from April 15 to July 19	from May 1 to July 5	from September 1 to November 30	from March 1 to February 28	
2003 (**4)	allocation of catch by area	5,839mt	1,392mt	3,056mt	1,391mt	-	
	actual catch	4,641mt	1,556mt	2,836mt	228mt	21mt	
	numbers of vessels	-	53vessels	105vessels	63vessels	-	
	fishing period	-	from April 21 to July 8	from May 1 to July 31	from September 1	from March 1 to February 28	

note: Fishing season of SBT is from March to February.

(**1) Original allocation of catch was revised because of the provisional measures prescribed by ITOLS were revoked by the arbitral tribunal.

(**2) Original numbers of vessels were revised because of the provisional measures prescribed by ITOLS were revoked by the arbitral tribunal.

(**3) Tentative allocation of catch was revised because of the voluntary catch limit by Japan was set at 6,421mt

(**4) Tentative as of 20 September 2002.

Import Statistics of SBT by Japan

Japanese Import of SBT by Country/Area (Fresh • Chilled and Frozen)

Source: Japan Trade Statistics, Ministry of Finance

(unit: kg)

	1994 from January to December	1995 from January to December	1996 from January to December	1997 from January to December	1998 from January to December	1999 from January to December	2000 from January to December	2001 from January to December	2002 from January to December	2003 from January to August
Australia	2,515,613	3,272,990	3,195,903	6,125,027	6,256,201	6,987,421	7,831,621	8,185,820	8,237,206	2,294,983
Taiwan	962,166	1,276,474	1,396,915	516,055	1,481,378	1,611,250	1,357,906	1,478,751	1,005,656	308,718
Korea	127,690	75,836	562,573	671,497	1,649,851	1,056,953	785,426	932,889	954,285	355,059
New Zealand	63,461	202,636	128,249	88,640	120,176	213,576	212,316	199,813	240,338	258,725
Indonesia	281,212	207,758	317,687	368,634	282,265	310,552	127,012	77,528	181,322	29,099
Seychel						1,129		32,435	176,740	
Philippines			182		4,415	69,170	15,041	16,197	54,828	22,465
China *		9,183				373	3,738	3,172	15,173	653
South Africa										1,160
Honduras	21,479	146,574	179,918	55,286	144,138	244,423	17,048			
Singapore	24,417	1,968	43,835	17,199	18,936	21,827	3,423			
Guam			680	454	3,673	2,429	1,900			
Fiji		445		396	181	972	526			
EQ Guinea					130,846	32,258	446			
Palau	886		569	690		1,073	166			
Thailand			333	376		645	125			
Belize		3,380	9,534	278	91,849	39,580				
Combodia					17,301	4,374				
Malaysia	497				271	836				
Greece						502				
Uruguay		342	102	1,028		186				
Tonga		138				162				
USA	102	1,320			2,062					
Panama				212,632						
Croatia				729						
F.S of Micronesia				195						
Maldives				163						
New Caledonia				119						
Portugal				93						
Vanuatu			17,855							
France			2,995							
Chile			334							
Cook Islands	111		140							
Spain		11,061								
Tunisia		124								
Toral	3,997,634	5,210,229	5,857,804	8,059,491	10,203,543	10,599,691	10,356,694	10,926,605	10,865,548	3,270,862

*Notes:

Imported SBT from China is originally captured by Japanese vessel and then processed at the factory in China which owned by Japanese company then reimported to Japan. The factory mentioned above was located in the Special Tariff area, therefore these imported tuna is treated specially on tax (reduction of taxes). From the China's point of view, these case is not the import from Japan neither exported to Japan from China, so Japan accepts this case without any TIS document.