

NOAA Technical Memorandum NMFS

OCTOBER 2014

SUPPLY AND MARKET FOR SABLEFISH IN JAPAN

Sunee C. Sonu

NOAA-TM-NMFS-WCR-102014

U.S. DEPARTMENT OF COMMERCE

Penny S. Pritzker, Secretary of Commerce

National Oceanic and Atmospheric Administration

Dr. Kathy Sullivan, Administrator

National Marine Fisheries Service

Eileen Sobeck, Administrator for Fisheries

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EXECUTIVE SUMMARY

Japan is by far the world's largest importer and consumer of sablefish (*Anoplopoma fimbria*). The current Japanese market for sablefish is supplied entirely by imports which in 2012 are estimated to have been about 15,000 metric tons (mt) in round weight, representing 69 percent of world sablefish catches that year.

In 2013, Japan imported 8,380 mt of frozen dressed sablefish valued at \$99 million. Although the volume of imports in 2013 was the lowest in the last 27 years, the average import price was the sixth highest. The increase in value was due mainly to strong demand, declining supply, a strong yen, and a consequent rise in price to suppliers of sablefish.

The United States is the primary supplier of sablefish to Japan. Japanese imports of sablefish from the United States in 2013 were 7,655 mt valued at \$90.6 million.

Sablefish is usually sold directly to licensed buyers at production-center wholesale markets located at Japanese ports of landings and consumer-center wholesale markets located in cities with populations of more than 200,000. It is also sold directly to processors or representatives of supermarket chains. Wholesale prices at the Tokyo Central Wholesale Market, the largest consumer-center fish wholesale market in the world, become price indices for fishery products. About 37 percent of Japanese imports of frozen dressed sablefish are sold at the Tokyo Central Wholesale Market.

Prices of frozen dressed sablefish are primarily determined by supply and demand, but prices of competitive fish, and the dollar-yen exchange rates are also important. Prices usually rise from late fall through winter and decline substantially during summer. In 2013, however, prices did not show a significant decline during summer, due to reduced imports and low inventories.

Sablefish most directly competes for market share with Patagonian toothfish (*Dissostichus eleginoides*). Japanese imports of Patagonian toothfish in 2013 totaled 2,054 mt (1,952 mt of dressed Patagonian toothfish and 102 mt of fillets Patagonian toothfish) valued at \$20 million. Total supply of Patagonian toothfish for 2013 decreased about 14 percent from the 2,382 mt imported in 2012.

Sablefish products imported into Japan are subject to tariffs. As Japan and the United States are signatories to the World Trade Organization (WTO), WTO tariffs apply to U.S. exports of fishery products. The current tariff for fresh or frozen sablefish products is 3.5 percent, calculated as a percentage of cost, insurance, and freight (CIF) value.

INTRODUCTION

Sablefish is an economically important groundfish species inhabiting the continental shelf and slope of the North Pacific Ocean and the Bering Sea. The resource has been exploited by U.S. and Canadian fishermen since the end of the 19th century. Other countries began fishing for sablefish after the middle of the 20th century.

Japan is presently the world's largest market for sablefish, absorbing about 69 percent of total world production in 2012. Japanese catches of sablefish, mostly near foreign coasts, were at one time the largest in the world. However, with the advent of extended jurisdiction, the Japanese fishery was eliminated off Canada after 1980, off the Soviet Union in 1986, and off the United States in 1987. By 1990, the Japanese sablefish fishery had been completely shut down and since then Japanese demand for sablefish has been supplied entirely by imports.

The United States has been the world's largest harvester of sablefish since 1978 and the economic importance of the sablefish resource has increased significantly in recent years. In 2012, the U.S. sablefish harvest contributed close to \$141 million ex-vessel value to U.S. commercial fishermen and ranked third in value among groundfish species (U.S. Department of Commerce 2014). The United States is the largest supplier of sablefish to Japan.

This report provides a detailed examination of the Japanese sablefish fishery, imports, and market, in order to identify potential export opportunities for U.S. producers.

WORLD FISHERY

Sablefish is widely distributed along the continental shelf and slope of the North Pacific Ocean from Baja California through Alaska and the Bering Sea, and westward to Japan (Sasaki 1985). The resource has been exploited by U.S. and Canadian fishermen since the end of 19th century, but catches were relatively small averaging 4,775 metric tons (mt) from 1915 to 1957 (Low et al. 1976). Until 1958, fishermen from the United States and Canada accounted for nearly all landings of sablefish (International North Pacific Fisheries Commission 1972).

Japan in 1958 and the U.S.S.R. in 1964 began fishing for sablefish in the Bering Sea (Table 1 and Figure 1). Total catch of sablefish by all nations reached a high of 66,000 mt in 1972, with Japan landing 85 percent of the fish. During the late 1970s, the Republic of Korea and other countries including Poland, Germany, and Bulgaria began to catch sablefish off Alaska (FAO 2014). Substantial catches by the U.S.S.R. and the

Republic of Korea were reported from 1966-1975 and 1977-1983, respectively. However, the establishment of the U.S. and Canada's 200-mile Exclusive Economic Zone (EEZ) in 1977 greatly reduced the catches of sablefish by foreign vessels in those waters. Increased development of domestic sablefish fisheries in the United States and Canada led to the elimination of foreign catches of sablefish in those nations' EEZs.

Since 1978, the United States has been the world's largest harvester of sablefish, producing over 89 percent of the world total in 2012. Canada has been a distant second since 1984. Only the United States and Canada harvested sablefish in 1990-1994 and 1997-1999, according to FAO catch statistics (FAO 2014). In a number of countries landings of sablefish were not recorded in 1990-1994 and 1997-1999, although sablefish was exported to Japan during those years. These countries included Argentina, Mexico, the Republic of Korea, New Zealand, Morocco Uruguay, China, Democratic People's Republic of Korea, Russia, and Thailand (Table 3).

Total sablefish landings in the United States steadily increased from 19,000 mt in 1983 to a peak of 49,000 mt in 1988. The landings have since declined in all fishing areas (Figure 2). In 2012, the United States landed about 19,000 mt of sablefish, of which 13,500 mt or 72 percent of the total catches were caught in the waters off Alaska.

Harvest of sablefish by Canada has gone from 383 mt in 1958 to a record high of 5,770 mt in 1988. The landings have since declined.

Sablefish are taken primarily with bottom trawl, longline, and pot gear. Trawls capture sablefish in mixed-species catches of a variety of groundfishes, whereas longline and pot gears more specifically target sablefish. There is little recreational fishing for sablefish, mostly because they live at depths too great for most kinds of recreational fishing gear (Leet et al. 1992 and U.S. Department of Commerce 2014).

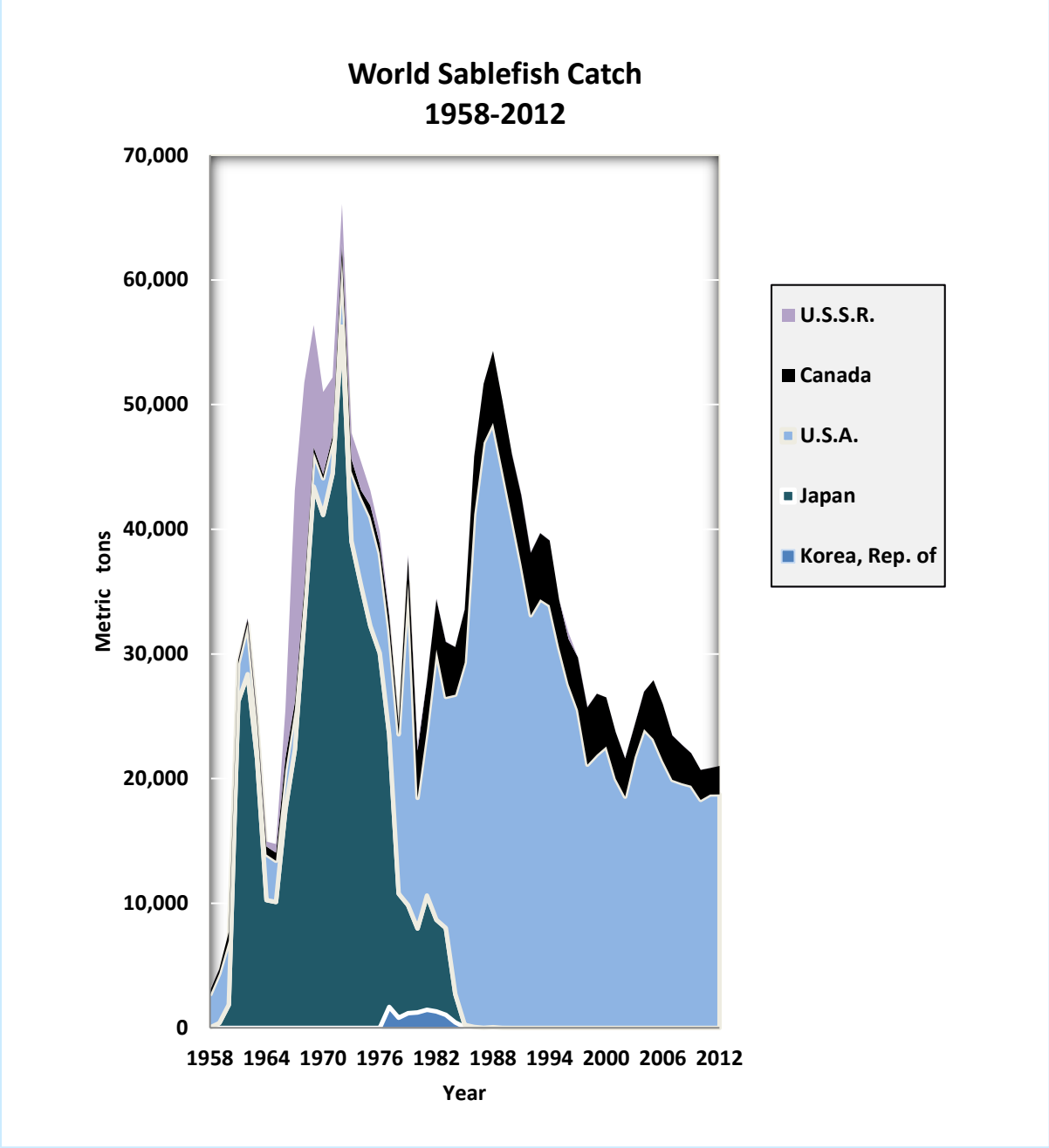


Figure 1. World annual sablefish catches, 1958-2012
(metric tons, round weight, catches are additive).

Sources: Noorin Keizai Kenkyusho 1965; Suisan Tsushin Sha 2000; FAO 2014; Suishan Sha 1968-1989; Hiatt et al. 1999; Ministry of Agriculture, Forestry, and Fisheries 1999; Int'l North Pacific Fisheries Commission 1967-1996; Department of Fisheries and Oceans 1994-1996, 2000, 2014; U.S. Department Of Commerce 2014.

U.S. landings of sablefish by state, 1952-2012

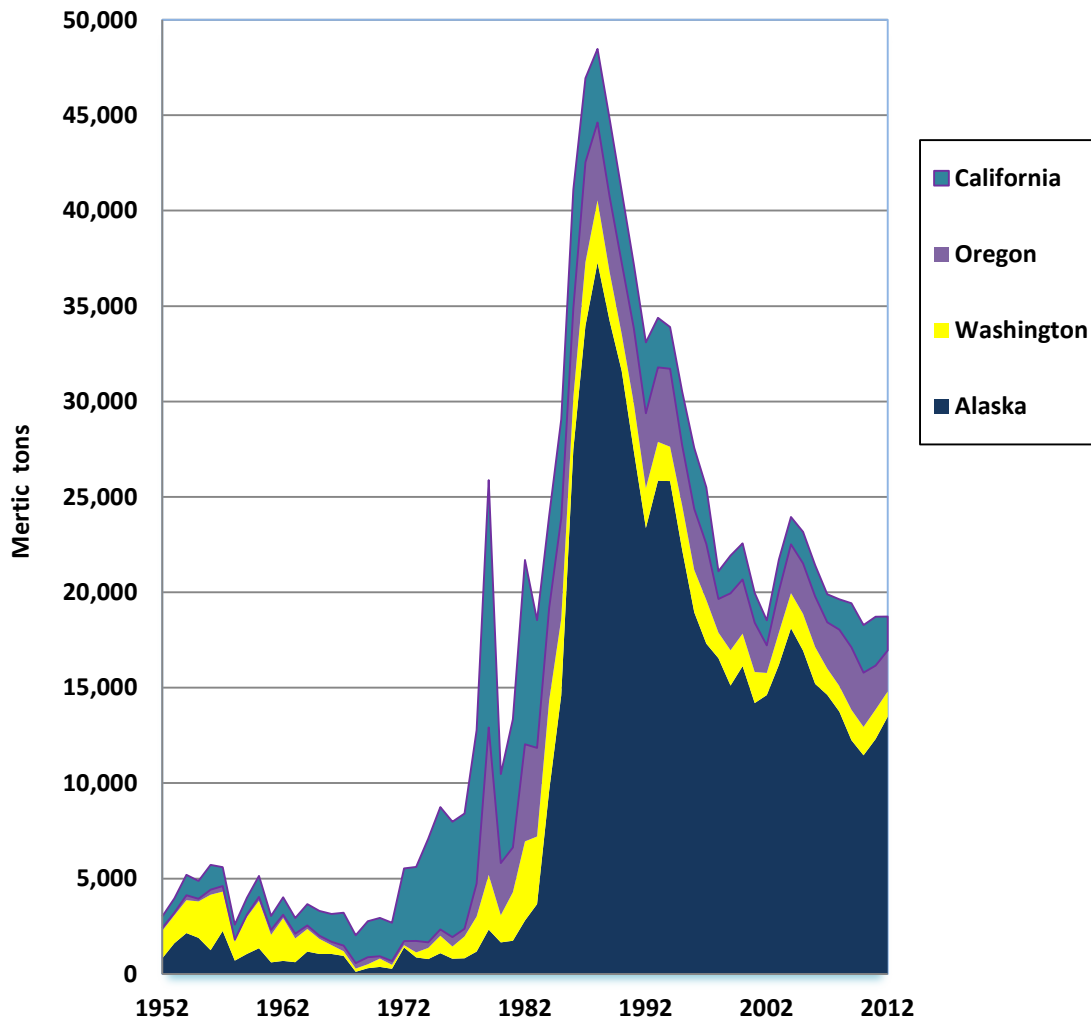


Figure 2. United States landings of sablefish by state, 1952-2012 (metric tons, round weight, landings are additive).

Source: U.S. Department of Commerce 2014

**Table 1. World sablefish catches by country, 1958-2012
(metric tons, round weight).**

Year	U.S.A.	Canada	Japan	U.S.S.R.	Korea	Others	Total
1958	2,587	383	32	0	0	0	3,002
1959	3,990	362	393	0	0	0	4,745
1960	5,137	705	1,861	0	0	0	7,703
1961	3,041	306	26,182	0	0	0	29,529
1962	4,018	428	28,381	0	0	0	32,827
1963	2,932	396	21,582	0	0	0	24,910
1964	3,660	637	10,252	400	0	0	14,949
1965	3,303	649	10,103	700	0	0	14,755
1966	3,144	970	17,516	3,900	0	0	25,530
1967	3,209	591	22,335	17,000	0	0	43,135
1968	2,028	577	32,762	16,400	0	0	51,767
1969	2,762	391	43,424	9,800	0	0	56,377
1970	2,937	327	41,151	6,600	0	0	51,015
1971	2,683	327	44,482	4,700	0	0	52,192
1972	5,531	1,104	56,255	3,200	0	0	66,090
1973	5,609	965	39,053	2,100	0	0	47,727
1974	7,091	503	35,549	2,300	0	0	45,443
1975	8,745	921	32,242	1,194	0	0	43,102
1976	7,978	796	30,062	961	0	0	39,797
1977	8,407	1,088	21,844	266	1,688	0	33,293
1978	12,773	831	9,960	61	814	43	24,482
1979	25,879	2,031	8,666	200	1,184	6	37,966
1980	10,475	3,793	6,736	447	1,241	192	22,884
1981	13,347	3,888	9,167	25	1,456	101	27,984
1982	21,693	4,028	7,350	66	1,323	3	34,463
1983	18,541	4,414	6,964	53	1,049	3	31,024
1984	24,005	3,827	2,282	2	442	10	30,568
1985	29,060	4,268	187	63	62	17	33,657
1986	41,102	4,668	43	54	36	4	45,907
1987	46,939	4,719	11	9	0	17	51,695
1988	48,474	5,770	62	8*	0	18	54,332
1989	44,806	5,493	5	1*	0	0	50,305
1990	41,018	5,038	0	0*	0	0	46,056
1991	37,209	5,531	0	0*	0	0	42,740
1992	33,103	5,029	0	0*	0	0	38,132
1993	34,384	5,310	0	0*	0	0	39,694
1994	33,901	5,202	0	0*	0	0	39,103
1995	30,523	3,838	0	8*	0	0	34,369
1996	27,568	3,626	0	502*	0	0	31,696
1997	25,498	4,214	0	0*	0	0	29,712
1998	21,119	4,612	0	0*	0	0	25,731
1999	21,925	4,888	0	0*	0	0	26,813
2000	22,577	3,938	0	6*	0	0	26,521
2001	19,984	3,741	0	6*	0	0	23,731
2002	18,550	3,072	0	50*	0	0	21,672
2003	21,731	2,555	0	46*	0	0	24,332
2004	23,972	3,006	0	28*	0	0	27,006
2005	23,176	4,719	0	6*	0	0	27,901
2006	21,422	4,536	0	14*	0	0	25,972

Table 1 (continued). World sablefish catches by country, 1958-2012 (metric tons, round weight).

Year	U.S.A.	Canada	Japan	U.S.S.R.	Korea	Others	Total
2007	19,902	3,564	0	19*	0	0	23,485
2008	19,634	3,095	0	27*	0	0	22,756
2009	19,427	2,615	0	17*	0	0	22,059
2010	18,288	2,412	0	10*	0	0	20,710
2011	18,724	2,124	0	7*	0	0	20,855
2012	18,734	2,281	0	1*	0	0	21,016

* Russian Fed.

Sources: Noorin Keizai Kenkyusho 1965; Suisan Tsushin Sha 2000; FAO 2014; Suishan Sha 1968-1989; Hiatt et al. 1999; Ministry of Agriculture, Forestry, and Fisheries 1999; Int'l North Pacific Fisheries Commission 1967-1996; Department of Fisheries and Oceans 1994-1996, 2000, 2014; U.S. Department of Commerce 2014

JAPANESE FISHERY

The Japanese sablefish fishery began in 1958 in the Bering Sea (Noorin Keizai Kenkyusho 1965). The fishery grew rapidly in this area and catches peaked in 1962 at 28,381 mt (Fig. 3 and Table 2). As stock abundance in the Bering Sea declined due to expanding fisheries, the fishing fleet extended its area of operation westward along the Aleutian Island chain and into the northeastern Pacific Ocean. Catches in the Aleutian Islands region remained at low levels, with a peak catch in 1972 of 3,262 mt. In the northeastern Pacific Ocean, sablefish catches increased rapidly to a peak of 40,553 mt in 1972. The Japanese sablefish fishery historically was not very active off the coast of Washington, Oregon, and California. The peak year of Japanese sablefish harvest from all fishing areas was 1972 when 56,255 mt of sablefish were harvested, which was over 85 percent of the world catch for that year (Table 1). From 1961 through 1976, annual Japanese catches averaged 30,708 mt. The majority of the catch took place in U.S. waters.

Following the passage of the Magnuson Fishery Conservation and Management Act (MFCMA) in 1976, resources in U.S. waters came under direct management of the United States and catch restrictions were implemented. Japanese harvest of sablefish has since ceased. Prior to enactment of the MFCMA in 1977, Japan was the world's largest sablefish harvesting nation, but its share of the world catch decreased from about 89 percent in 1961 to less than one percent in 1986. Japanese sablefish fishing in the U.S. Exclusive Economic Zone (EEZ) ended in 1986

in the Gulf of Alaska and in 1987 in the Bering Sea and Aleutian Islands as a result of implementation of the MFCMA.

In Canadian waters, the Japanese catch quota was reduced from 3,000 mt in 1977 to 200 mt in 1980. After 1980, the Japanese directed fishery for sablefish off Canada was eliminated (McFarlane and Beamish 1983). In 1986, Japanese stopped fishing for sablefish in Soviet waters (U.S. Department of Commerce 1986).

From 1987 through 1989, the Japanese sablefish fishery was conducted only in international waters and catch amounts were insignificant. The Japanese have not harvested sablefish since 1990.

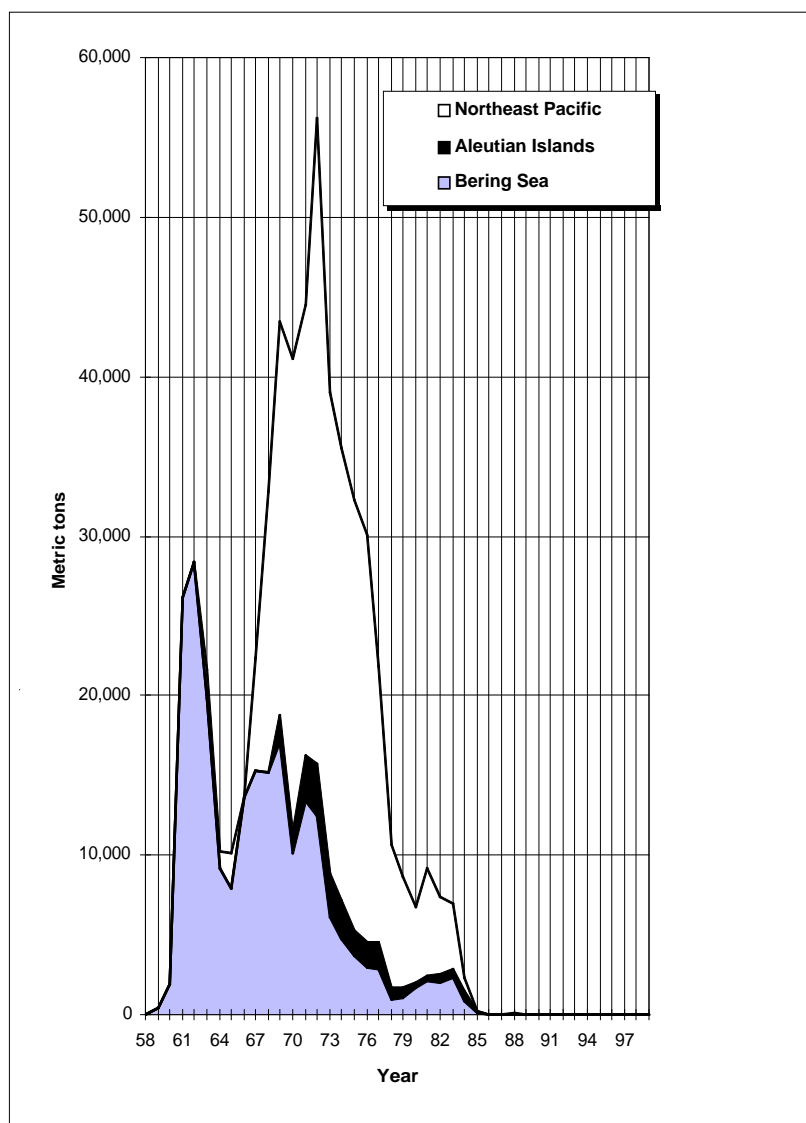


Figure 3. Japanese annual sablefish catches by area, 1958-1999 (metric tons, round weight, catches are additive).

**Table 2. Japanese annual sablefish catches by area, 1958-1999
(metric tons).**

Area	1958	1959	1960	1961	1962	1963	1964	1965	1966
Bering Sea:									
W of 170EE	-*	-	-	-	-	728	460	279	134
170EE-180E	32	393	1,861	10,555	3,703	3,453	2,697	733	1,584
180E-170EW	-	-	-	14,857	16,849	8,193	3,369	1,460	1,977
E of 170EW	-	-	-	770	8,189	7,455	1,394	846	2,987
Unknown area	-	-	-	-	-	-	1,295	4,568	6,875
Sub-total	32	393	1,861	26,182	28,381	19,829	9,215	7,886	13,557
Aleutian Islands									
	-	-	-	-	-	-	-	-	-
Northeast Pacific:									
Unalaska	-	-	-	-	-	171	73	-	-
Albatross	-	-	-	-	-	201	302	-	-
Portlock	-	-	-	-	-	1,113	459	-	-
Shumagin	-	-	-	-	-	41	22	-	1,071
Middleton	-	-	-	-	-	227	181	-	-
Atka	-	-	-	-	-	-	-	-	37
Chirikof	-	-	-	-	-	-	-	768	-
Kodiak	-	-	-	-	-	-	-	-	1,840
Yakutat	-	-	-	-	-	-	-	-	32
Southeastern	-	-	-	-	-	-	-	-	-
Charlotte	-	-	-	-	-	-	-	-	164
Vancouver	-	-	-	-	-	-	-	-	10
Columbia	-	-	-	-	-	-	-	-	-
Eureka	-	-	-	-	-	-	-	-	-
Monterey	-	-	-	-	-	-	-	-	-
Unknown area	-	-	-	-	-	-	-	2,217	37
Sub-total	-	-	-	-	-	1,753	1,037	2,217	3,959

Table 2 (continued). Japanese annual sablefish catches by area, 1958-1999 (metric tons).

Area	1967	1968	1969	1970	1971	1972	1973	1974	1975
Bering Sea:									
W of 170EE	13	-	380	158	330	170	63	39	14
170EE-180E	1,070	142	2,268	1,069	821	1,649	1,250	510	943
180E-170EW	3,542	1,037	9,942	5,417	8,645	7,600	3,216	2,597	1,842
E of 170EW	1,789	335	4,482	3,441	3,631	3,021	1,549	1,584	888
Unknown area	8,917	13,701	-	-	-	-	-	-	-
sub-total	15,331	15,215	17,078	10,093	13,428	12,440	6,078	4,730	3,687
Aleutian Islands	-	-	1,673	1,247	2,766	3,262	2,740	2,463	1,630
Northeast Pacific:									
Unalaska	-	-	-	-	-	-	-	-	-
Albatross	-	-	-	-	-	-	-	-	-
Portlock	-	-	-	-	-	-	-	-	-
Shumagin	460	296	829	1,556	2,047	3,858	3,932	3,897	4,152
Middleton	-	-	-	-	-	-	-	-	-
Atka	60	-	-	-	-	-	-	-	-
Chirikof	340	326	927	1,441	1,611	2,983	3,390	2,624	2,116
Kodiak	1,490	1,327	3,251	5,245	5,375	7,769	6,116	3,801	3,790
Yakutat	1,418	5,562	6,787	8,253	7,503	9,948	7,307	6,490	5,660
Southeastern	642	7,204	7,050	7,878	8,692	11,001	6,519	7,364	6,354
Charlotte	381	1,870	2,533	3,980	2,180	2,784	2,143	2,084	3,286
Vancouver	808	520	2,187	1,162	870	1,452	807	1,782	1,416
Columbia	668	395	716	138	10	585	21	315	151
Eureka	636	9	30	-	-	174	-	-	-
Monterey	-	-	159	-	-	-	-	-	-
Unknown area	101	38	204	188	-	-	-	-	-
Sub-total	7,004	17,547	24,673	29,811	28,288	40,553	30,235	28,356	26,925
Total	22,335	32,762	43,424	41,151	44,482	56,255	39,053	35,549	32,242

Table 2 (continued). Japanese annual sablefish catches by area, 1958-1999 (metric tons).

Area	1976	1977	1978	1979	1980	1981	1982	1983	1984
Bering Sea:									
W of 170EE	9	-	-	-	-	-	-	-	-
170EE-180E	145	9	1	-	-	-	-	-	-
180E-170EW	1,223	1,233	322	269	422	534	954	1,019	557
E of 170EW	1,575	1,554	615	791	1,286	1,585	1,019	1,338	301
sub-total	2,952	2,796	938	1,060	1,708	2,119	1,973	2,357	860
Aleutian Islands	1,558	1,761	732	638	303	255	583	520	628
Northeast Pacific:									
Shumagin	4,244	1,240	1,371	809	684	1,257	1,276	967	681
Chirikof	2,011	1,360	968	990	1,204	1,515	1,239	1,093	90
Kodiak	3,293	3,000	1,925	2,084	1,386	1,239	1,151	886	23
Yakutat	5,746	5,002	2,623	1,938	1,220	3,709	1,126	1,140	-
Southeastern	6,630	3,724	32	79	50	71	-	-	-
Charlotte	2,628	1,818	1,339	569	60	-	-	-	-
Vancouver	866	1,143	764	437	121	1	2	-	-
Columbia	58	-	-	-	-	-	-	-	-
Eureka	37	-	-	-	-	-	-	-	-
Monterey	39	-	-	-	-	-	-	-	-
Seamount	-	-	-	-	-	1	-	-	-
Unknown area	-	-	-	62	-	-	-	-	-
Sub-total	25,552	17,287	9,022	6,968	4,725	6,793	4,794	4,087	794
Total	30,062	21,844	9,960	8,666	6,736	9,167	7,350	6,964	2,282

Table 2 (continued). Japanese annual sablefish catches by area, 1958-1999 (metric tons).

Area	1985	1986	1987	1988	1989	1990-1999
Bering Sea:						
W of 170EE	-	-	-	-	-	-
170EE-180E	-	-	-	-	-	-
180E-170EW	81	42	9	-	-	-
E of 170EW	43	-	-	-	-	-
sub-total	124	42	9	-	-	-
Aleutian Islands	58	-	-	-	-	-
Northeast Pacific:						
Shumagin	2	1	-	-	-	-
Chirikof	-	-	-	-	-	-
Kodiak	2	-	-	-	-	-
Yakutat	-	-	-	-	-	-
Southeastern	1	-	-	-	-	-
High seas	-	-	2	62	5	-
Sub-total	5	1	2	62	5	-
Total	187	43	11	62	5	-

*- zero catch

Sources: Noorin Keizai Kenkyusho 1965
 FAO 1995-1999
 Ministry of Agriculture, Forestry, and Fisheries 1996-1999
 Suisan Sha 1968-1989
 Int'l North Pacific Fisheries Commission 1967-1996
 Suisan Tsushin Sha 2000

IMPORTS

Japan is the world's largest importer of sablefish. In 2013, Japan imported 8,380 mt of dressed fresh and frozen sablefish valued at about \$99 million (Tables 3 and 4). The United States has consistently been the leading supplier of sablefish to Japan, providing about 91 percent of the 2013 total. Canada has been a distant second with supplies of about 9 percent of the total. During the last 27 years, 15 other countries supplied less than one percent of the total.

Although the volume of imports in 2013 was the lowest in the last 27 years, the average import price was the sixth highest (Table 4 and Figure 4). The average import price advanced from \$4.14/kg in 1987 to \$11.81/kg in 2013. Good demand, declining supply, higher wholesale prices, and the strong yen (Appendix 1) contributed to the increase in value.

Japan did not begin to report separate import statistics for sablefish until 1987. Prior to that time, sablefish imports were lumped together with those of cod and cod-like species. According to unofficial statistics compiled by a Japanese fishery industry newspaper, Japan imported between 3,490 mt and 3,990 mt of sablefish in 1983, 8,647 mt in 1984, and 12,100 mt in 1985 (Suisan Keizai Shinbun Sha 1985 and 1986).

Japan's imports of sablefish increased sharply from 1983 to a high in 1988, but have since shown a downward trend. Imports of sablefish in 2013 were the lowest in volume since 1983, and 73 percent less than the record year of 1988. This is mostly because of decreasing catches and exports by the United States.

Japan regulates imports of fishery products with import quotas (IQ) and tariffs. Over the years, Japan has relaxed its IQ and reduced trade barriers through multilateral and bilateral trade negotiations. Tariffs have been gradually cut by about one-third since 1995 on a number of fishery products.

Sablefish products imported into Japan are subject to tariffs, but not IQ. As Japan and the United States are signatories to the World Trade Organization (WTO), WTO tariffs apply to U.S. exports of fishery products. The current tariff for fresh or frozen sablefish products is 3.5 percent, calculated as a percentage of cost, insurance, and freight (CIF) value.

Table 3. Japanese imports of fresh and frozen dressed sablefish by volume, 1987-2013 (metric tons).

Country of origin	1987	1988	1989	1990	1991	1992	1993
U.S.A.	25,770	27,186	26,041	23,591	20,892	17,252	22,697
Canada	2,762	3,162	3,285	2,816	3,272	2,719	2,986
Argentina	- *	-	-	-	-	1	-
Mexico	-	189	-	-	112	148	37
Korea, Rep.	21	4	10	33	2	125	-
New Zealand	-	-	-	-	-	13	-
Morocco	-	17	-	9	-	-	-
Korea, D.P.Rp.	-	-	18	-	-	-	-
Hong Kong	28	-	-	-	-	-	-
Total **	28,584	30,558	29,354	26,449	24,277	20,258	25,720

Country of Origin	1994	1995	1996	1997	1998	1999	2000
U.S.A.	18,064	17,823	16,551	12,546	12,943	12,645	12,112
Canada	2,991	2,429	2,261	2,033	2,753	2,697	2,028
Uruguay	-	-	-	-	-	24	-
China	-	-	-	-	-	16	-
Argentina	-	-	-	-	-	15	-
Russia	-	4	4	-	-	1	3
Mexico	-	-	8	29	53	-	-
Thailand	1	-	-	-	-	-	-
Pakistan	-	-	8	-	-	-	-
Senegal	-	-	8	-	-	-	-
Total **	21,056	20,256	18,840	14,609	15,748	15,398	14,144

Table 3 (continued). Japanese imports of fresh and frozen dressed sablefish by volume, 1987-2013 (metric tons).

Country of origin	2001	2002	2003	2004	2005	2006	2007
U.S.A.	11,677	10,596	10,983	12,987	10,940	10,999	10,829
Canada	2,250	1,586	1,266	1,861	2,540	2,125	1,899
China	38	41	10	22	29	22	207
Russia	3	45	36	17	11	11	1
Mexico	-	23	23	-	11	54	16
Thailand	-	-	-	1	-	-	-
Bangladesh	3	-	-	-	-	-	-
Iceland	-	-	-	-	-	-	4
Total **	13,970	12,292	12,319	14,887	13,532	13,211	12,956

Country of origin	2008	2009	2010	2011	2012	2013
U.S.A.	9,772	9,409	8,402	7,878	8,324	7,655
Canada	1,563	1,196	941	762	789	725
Russia	1	2	3	0.4	0.3	-
Mexico	-	-	2	-	-	-
Total **	9,772	10,607	9,349	8,640	9,444	8,380

*- zero imports

** Totals may not add due to rounding of data

Sources: Japan Marine Products Importers Association 1988-2000;
Ministry of Finance, Japan 2014

**Table 4. Japanese imports of fresh and frozen dressed sablefish
By value, 1987-2013 (U.S. \$1,000*).**

Country of origin	1987	1988	1989	1990	1991	1992	1993
U.S.A.	105,215	139,261	118,075	106,699	131,324	106,485	138,044
Canada	13,007	17,382	15,302	16,709	27,573	18,745	19,011
Argentina	-**	-	-	-	-	3	-
Mexico	-	556	-	-	522	672	99
Korea, Rep.	75	24	38	66	18	702	-
New Zealand	-	-	-	-	-	45	-
Morocco	-	17	-	10	-	-	-
Korea, D.P.Rp.	-	-	61	-	-	-	-
Hong Kong	67	-	-	-	-	-	-
Total	118,364	157,240	133,477	123,484	159,436	126,652	157,154

Country of Origin	1994	1995	1996	1997	1998	1999	2000
U.S.A.	131,297	157,498	150,316	118,086	93,691	101,466	111,571
Canada	25,230	22,724	21,173	19,700	19,691	21,399	19,585
Uruguay	-	-	-	-	-	4	-
China	-	-	-	-	-	76	-
Argentina	-	-	-	-	-	46	-
Russia	-	23	22	-	-	8	25
Mexico	-	-	37	196	312	-	-
Thailand	10	-	-	-	-	-	-
Pakistan	-	-	13	-	-	-	-
Senegal	-	-	9	-	-	-	-
Total	156,538	180,244	171,569	137,982	113,142	123,037	131,181

Table 4 (continued). Japanese imports of fresh and frozen dressed sablefish by value, 1987-2013 (U.S. \$1,000*).

Country of origin	2001	2002	2003	2004	2005	2006	2007
U.S.A.	97,559	92,882	101,423	108,227	97,936	106,078	112,345
Canada	19,412	13,654	11,913	15,683	23,380	20,597	19,378
China	297	406	124	198	297	247	1,471
Russia	22	250	180	99	71	92	-
Mexico	-	170	196	-	85	156	109
Thailand	-	-	-	10	-	-	-
Bangladesh	5	-	-	-	-	-	-
Iceland	-	-	-	-	-	-	38
Total	117,298	107,363	113,836	124,212	121,769	127,428	133,348

Country of origin	2008	2009	2010	2011	2012	2013
U.S.A.	120,080	117,491	121,958	149,138	106,832	90,603
Canada	18,448	15,791	13,839	14,881	11,420	8,347
Russia	5	19	46	7	4	-
Mexico	-	-	219	-	-	-
Total	138,534	133,302	135,863	164,027	118,255	98,946

*.... Converted to US dollar using Japanese Ministry of Finance official exchange rate (see Appendix 1)

** - zero imports

Totals may not add due to rounding of data

Sources: Japan Marine Products Importers Association 1988-2000;
Ministry of Finance, Japan 2014

Table 5. Japanese annual import volumes, imports value and average nominal import prices of sablefish, 1987-2013.

Year	Total volume (metric ton)	Total value (U.S. \$1,000)	Unit value (\$/kg)
1987	28,584	118,364	4.14
1988	30,558	157,240	5.15
1989	29,354	133,477	4.55
1990	26,449	123,484	4.67
1991	24,277	159,436	6.57
1992	20,258	126,652	6.25
1993	25,720	157,154	6.11
1994	21,056	156,538	7.43
1995	20,256	180,244	8.90
1996	18,840	171,569	9.10
1997	14,609	137,982	9.45
1998	15,748	113,142	7.18
1999	15,398	123,037	7.99
2000	14,144	131,181	9.27
2001	13,970	117,295	8.40
2002	12,292	107,363	8.73
2003	12,319	113,836	9.24
2004	14,887	124,212	8.34
2005	13,532	121,769	9.00
2006	13,211	127,428	9.65
2007	12,956	133,348	10.29
2008	9,772	138,534	14.18
2009	10,607	133,302	12.57
2010	9,349	135,863	14.53
2011	8,640	164,027	18.98
2012	9,444	118,255	12.52
2013	8,380	98,946	11.81

Sources: Japan Marine Products Importers Association 1988-2000;
Ministry of Finance, Japan 2014

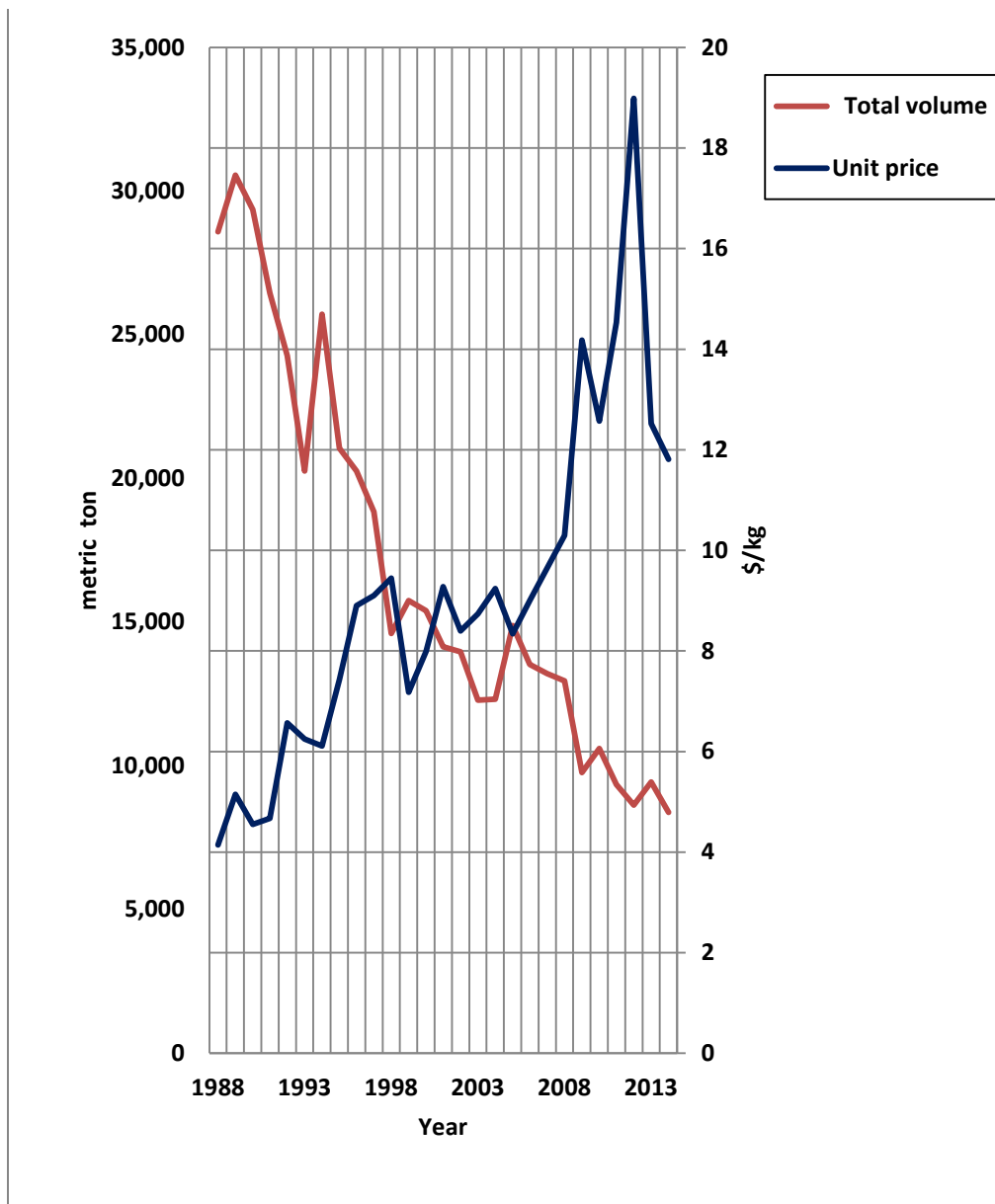


Figure 4. Japanese annual import volumes and average Nominal import prices of sablefish, 1987-2013.

Sources: Japan Marine Products Importers Association 1988-2000; Ministry of Finance, Japan 2014

SUPPLIERS

United States

Exports of U.S. sablefish to all destinations increased from a negligible amount in 1981 to a peak of 23,000 mt in 1989, but have since shown a downward trend (Tables 6 and 7). Japan is still the U.S.'s foremost export market for sablefish and in 2013 purchased 78 percent of total U.S. exports of sablefish. The average U.S. export price of sablefish to Japan increased 22 percent to \$10.53/kg in 2013 from \$8.65/kg in 2007. The increase in price was due mainly to the appreciation of the Japanese yen relative to the U.S. dollar and higher demand for sablefish in Japan.

Exports of U.S. fishery products have greatly benefited from the weaker dollar relative to the Japanese yen in recent years. The annual average value of the U.S. dollar relative to the yen was 17 percent lower at 98 yen/U.S. dollar in 2013 from 118 yen/U.S. dollar in 2007 (Appendix 1). Thus even if Japanese sablefish prices had remained unchanged, prices paid to U.S. exporters would have increased. The Japanese annual average import price of sablefish in 2013 was 5 percent lower in the yen price but 15 percent higher in the dollar price from 2007 level.

Hong Kong, the second largest export market for U.S. sablefish in 2013, has substantially increased its imports of sablefish, from less than one percent of U.S. exports in 1991 to 7 percent in 2013.

Canada

Canada exported 1,105 mt of sablefish in 2013, valued at Canadian \$12.1 million, a decrease of 35 percent in quantity and 31 percent in value over 2012 exports (Tables 8 and 9). Canada's exports of sablefish between 2001 and 2013 have fluctuated within a fairly narrow range, 1,100-2,400 mt.

Japan continued to be Canada's single largest export market for sablefish in 2013, taking 72 percent by volume and 78 percent by value of Canada's sablefish exports. Compared to 2012, although total quantity remained almost unchanged, value was down 15 percent.

After Japan, the United States has been the second most important market for Canadian sablefish, buying 15 percent of Canada's total sablefish exports in 2013. Canada exported 161 mt of sablefish to the United States in 2013, a 75 percent decrease over 2012. Canada's exports of sablefish to the United States have fluctuated between 95 and 744 mt since 1997.

Table 6. United States exports of sablefish by country of destination, by volume, 1981-2013 (metric tons).

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Japan	340	1,319	414	4,718	7,202	11,874	18,758	18,892	22,116	17,727
Korea, Rep.	-	-	-	-	-	195	158	-	203	1,749
Hong Kong	-	-	-	-	-	1	-	8	7	21
Belgium	-	-	1	3	-	-	17	18	-	-
France	-	-	8	-	-	-	21	-	-	13
China	-	-	-	-	-	-	-	-	-	-
Singapore	-	-	-	-	1	-	-	-	-	-
Dominican Rep.	-	1	-	-	-	-	-	-	-	-
Spain	-	-	-	-	-	-	34	-	60	-
Malaysia	-	-	-	-	-	-	-	-	-	-
United Kingdom	26	-	-	-	5	-	-	-	-	17
Sweden	-	-	-	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-	-	-	-
Canada	23	18	39	14	15	15	9	11	215	-
Mexico	2	2	-	-	-	-	-	4	-	1
Bermuda	-	-	-	-	-	-	-	-	-	-
Norway	-	-	-	-	-	-	-	-	139	102
Taiwan	7	-	77	17	-	-	-	-	18	-
Brazil	-	-	-	-	-	-	-	-	-	-
Netherlands	-	5	-	-	-	-	3	-	-	-
Germany	-	-	-	-	-	-	-	-	1	83
Italy	-	-	-	-	-	-	-	-	-	-
Denmark	-	-	-	-	-	-	-	-	-	-
Portugal	-	-	-	-	-	-	-	30	-	-
Venezuela	66	-	-	-	-	-	-	-	-	-
Egypt	-	-	-	350	-	-	-	-	-	-
Ireland	-	-	-	-	-	-	-	-	-	-
Others	4	5	-	-	-	-	-	-	-	-
Total	469	1,349	538	5,102	7,223	12,085	19,000	18,962	22,759	19,712

Table 6 (continued). United States exports of sablefish by country of destination, by volume, 1981-2013 (metric tons).

	1991	1992	1993	1994	1995	1996	1997	1998	1999
Japan	18,180	14,659	20,348	15,119	16,566	14,804	11,013	7,522	9,323
Korea, Rep.	424	291	-	39	164	1,046	1,436	1,909	2,920
Hong Kong	32	117	188	205	302	472	369	138	327
Belgium	-	25	-	1	-	95	-	-	131
France	39	133	61	1	37	67	7	29	129
China	-	-	-	16	40	186	35	126	128
Singapore	-	10	7	8	18	25	85	29	102
Dominican Rep.	-	-	-	-	-	-	-	-	94
Spain	-	7	62	376	53	24	-	20	62
Malaysia	-	-	-	-	-	-	21	-	28
United Kingdom	39	166	20	298	-	-	3	4	15
Sweden	-	-	-	-	-	-	-	-	15
Thailand	-	-	-	8	32	22	-	-	12
Canada	-	-	-	-	-	-	-	-	11
Mexico	3	-	-	1	2	-	-	14	6
Bermuda	-	-	-	-	-	-	1	-	1
Norway	-	-	63	-	-	-	-	16	-
Taiwan	86	11	10	5	19	30	49	242	-
Brazil	-	-	-	714	-	-	-	-	-
Netherlands	-	-	50	5	-	77	-	-	-
Germany	-	-	20	-	-	-	-	42	-
Italy	-	11	19	-	-	57	-	-	-
Denmark	36	74	-	-	-	-	-	-	-
Portugal	-	86	-	-	-	-	-	-	-
Venezuela	-	-	-	-	-	-	-	135	-
Egypt	-	-	-	-	-	-	-	-	-
Ireland	13	-	-	-	-	73	-	-	-
Others	-	-	1	5	-	4	31	5	-
Total	18,852	15,589	20,849	16,801	17,234	16,980	13,050	10,232	13,305

Table 6 (continued). United States exports of sablefish by country of destination, by volume, 1981-2013 (metric tons).

	2000	2001	2002	2003	2004	2005	2006	2007	2008
Japan	11,885	6,835	7,353	10,018	12,456	9,323	8,068	6,018	6,163
Norway	192	22	20	-	395	75	58	-	577
China, Hong Kong	506	304	241	287	408	777	712	351	359
South Korea	2,585	1,217	87	293	150	204	356	126	314
Canada	19	42	22	16	36	59	90	253	272
China	329	682	40	40	199	1,201	500	366	271
Singapore	107	95	54	84	99	124	136	253	259
United Kingdom	98	82	8	121	128	111	104	86	156
Mexico	10	98	106	77	108	86	32	12	71
France	40	-	-	-	-	2	17	-	36
Russian Federation	-	-	-	-	7	103	8	16	28
Italy	247	-	-	-	-	-	-	0	22
Thailand	-	-	20	-	22	58	38	16	20
Philippines	19	18	-	38	49	46	18	20	18
Germany	6	-	24	-	93	227	-	9	13
Malaysia	8	-	-	-	21	-	40	-	9
Ukraine	-	-	-	-	-	-	1	1	9
Australia	-	-	-	-	-	-	-	-	1
Viet Nam	-	-	-	-	-	-	40	-	-
Belgium	21	-	-	-	-	8	1	-	-
Bulgaria	-	-	-	-	-	23	-	-	-
China, Taipei	190	-	-	-	-	-	-	-	-
Honduras	-	41	-	-	-	-	-	-	-
Denmark	33	-	-	3	-	25	-	6	-
Dominican Republic	-	-	-	17	-	23	-	-	-
Indonesia	-	-	-	-	57	-	8	5	-
Israel	-	-	-	-	-	85	1	-	-
Lebanon	-	-	-	-	-	90	-	-	-
Lithuania	-	-	-	-	-	-	2	31	-
Netherlands	2	-	-	-	5	-	6	22	-
Netherland Antilles	-	-	-	-	-	-	1	20	-
Nicaragua	-	-	-	-	1	-	-	-	-

Table 6 (continued). United States exports of sablefish by country of destination, by volume, 1981-2013 (metric tons).

	2000	2001	2002	2003	2004	2005	2006	2007	2008
Poland	-	-	-	-	2	-	-	-	-
Portugal	20	-	193	-	-	145	-	64	-
Romania	-	-	-	-	-	23	-	-	-
Serbia-Montenegro	-	-	10	-	-	-	-	-	-
Spain	401	-	-	573	216	1	1	2	-
St.Kittis-Nevis	-	-	-	-	-	-	0	-	-
Switzerland	-	-	-	-	-	61	0	1	-
Venezuela	72	-	-	-	-	-	-	-	-
Total	16,791	9,436	8,179	11,568	14,451	12,882	10,237	7,681	8,598

Table 6 (continued). United States exports of sablefish by country of destination, by volume, 1981-2013 (metric tons).

	2009	2010	2011	2012	2013
Japan	8,004	7,156	10,112	7,760	6,754
China, Hong Kong	409	732	852	928	576
China	209	205	491	213	212
Russian Federation	50	105	415	160	195
Canada	189	172	151	113	146
Singapore	106	183	201	216	136
United Kingdom	63	67	58	134	82
Netherlands	72	87	57	14	71
Thailand	26	20	82	66	71
Australia	16	37	92	28	62
United Arab Emirates	-	59	111	95	57
France	-	58	144	16	51
South Korea	367	92	80	151	48
Ukraine	20	1	-	5	28
Indonesia	37	-	9	9	44
Belgium	-	-	-	-	25
Philippines	37	52	-	46	24
Brazil					18
Germany	17	21	33	32	13
Viet Nam	-	10	23	58	8
Mexico	22	52	21	4	8
Israel	1	1	1	1	5
Spain	18	-	-	23	4
Switzerland	-	0	1	0	4
Kazakhstan	-	-	-	-	2
Fed States of Micron	-	-	-	-	1
Italy	11	16	-	11	1
Sweden	-	-	-	-	1
Bahama	-	-	2	-	-
China, Taipei	9	13	-	-	-
Denmark	36	-	31	50	-
Lebanon	-	-	24	-	-
Lithuania	1	-	-	-	-
Malaysia	13	9	96	-	-
New Zealand	-	-	-	0	-
Portugal	-	-	-	8	-
South Africa	-	-	2	-	-
Total	9,734	9,148	13,088	10,144	8,646

- zero exports;

0 more than zero but less than 0.5 metric tons

Totals may not add due to rounding of data

Source: U.S. Department of Commerce 1982-2014

Table 7. United States exports of sablefish by country of destination, by value, 1981-2013 (U.S. \$1,000).

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Japan	541	3,262	769	11,556	22,075	35,517	69,572	87,608	81,837	70,115
Korea, Rep.	-*	-	-	-	-	585	180	-	384	2,006
Hong Kong	-	-	-	-	-	2	-	42	35	90
Belgium	-	-	2	8	-	-	139	39	-	-
France	-	-	24	-	-	-	69	-	-	42
China	-	-	-	-	-	-	-	-	-	-
Singapore	-	-	-	-	2	-	-	-	-	-
Dominican Rep.	-	1	-	-	-	-	-	-	-	-
Spain	-	-	-	-	-	-	56	-	109	-
Malaysia	-	-	-	-	-	-	-	-	-	-
United Kingdom	37	-	-	-	3	-	-	-	-	25
Sweden	-	-	-	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	-	-	-	-
Canada	31	33	70	32	47	30	27	19	401	-
Mexico	2	2	-	-	-	-	-	5	-	3
Bermuda	-	-	-	-	-	-	-	-	-	-
Norway	-	-	-	-	-	-	-	-	187	120
Taiwan	10	-	104	17	-	-	-	-	48	-
Brazil	-	-	-	-	-	-	-	-	-	-
Netherlands	-	32	-	-	-	-	14	-	-	-
Germany	-	-	-	1	-	-	-	-	4	185
Italy	-	-	-	-	-	-	-	-	-	-
Denmark	-	-	-	-	-	-	-	-	-	-
Portugal	-	-	-	-	-	-	-	80	-	-
Venezuela	78	-	-	-	-	-	-	-	-	-
Egypt	-	-	-	292	-	-	-	-	-	-
Ireland	-	-	-	-	-	-	-	-	-	-
Others	11	10	-	-	-	-	-	-	-	-
Total	710	3,340	968	11,906	22,127	36,134	70,057	87,794	83,004	72,586

Table 7 (continued). United States exports of sablefish by country of destination, by value, 1981-2013 (U.S. \$1,000).

	1991	1992	1993	1994	1995	1996	1997	1998	1999
Japan	95,848	77,474	89,530	86,235	97,421	87,208	57,574	40,543	45,771
Korea, Rep. of	1,252	129	-	113	498	1,965	3,991	5,436	10,452
Hong Kong	153	663	1,047	1,521	1,862	2,453	1,762	677	1,883
Belgium	-	45	-	4	-	142	-	-	600
France	68	390	140	3	182	256	32	189	495
China	-	-	-	69	180	373	209	339	592
Singapore	-	31	30	44	86	195	477	106	589
Dominican Rep.	-	-	-	-	-	-	-	-	286
Spain	-	36	100	519	103	54	-	40	300
Malaysia	-	-	-	-	-	-	100	-	143
United Kingdom	32	335	11	176	-	-	15	18	75
Sweden	-	-	-	-	-	-	-	-	32
Thailand	-	-	-	61	158	153	-	-	30
Canada	-	-	-	-	-	-	-	-	29
Mexico	8	-	-	4	4	-	-	9	16
Bermuda	-	-	-	-	-	-	3	-	4
Norway	-	-	91	-	-	-	-	16	-
Taiwan	398	27	41	26	127	132	50	162	-
Brazil	-	-	-	366	-	-	-	-	-
Netherlands	-	-	144	6	-	116	-	-	-
Germany	-	-	40	-	-	-	-	174	-
Italy	-	20	43	-	-	183	-	-	-
Denmark	140	125	-	-	-	-	-	-	-
Portugal	-	137	-	-	-	-	-	-	-
Venezuela	-	-	-	-	-	-	-	78	-
Egypt	-	-	-	-	-	-	-	-	-
Ireland	13	-	-	-	-	122	-	-	-
Others	-	-	1	22	-	18	102	14	-
Total	97,911	79,411	91,224	89,168	100,619	93,370	64,314	47,803	61,296

Table 7 (continued). United States exports of sablefish by country of destination, by value, 1981-2013 (U.S. \$1,000).

	2000	2001	2002	2003	2004	2005	2006	2007	2008
Japan	63,010	46,003	43,185	60,953	79,666	57,377	63,811	52,070	57,265
Hong Kong	2,607	1,458	1,378	1,823	2,315	4,330	5,013	3,673	4,148
Singapore	521	448	333	488	488	495	902	997	2,858
Norway	857	40	51	-	823	120	133	-	2,269
China	1,181	889	216	171	1,300	4,601	3,364	2,495	2,114
South Korea	11,845	5,133	477	1,207	717	867	1,973	938	1,890
Canada	58	171	72	81	172	222	358	1,052	1,145
United Kingdom	451	505	32	385	707	633	1,127	650	958
France	111	-	-	-	-	18	101	-	499
Russian Federation	-	-	-	-	34	194	89	198	395
Thailand	-	-	26	-	188	255	321	205	271
Mexico	62	480	469	337	154	335	102	31	195
Germany	23	-	45	-	299	773	-	80	108
Philippines	95	86	-	214	211	225	196	218	44
Italy	1,277	-	-	-	-	-	-	3	41
Ukraine	-	-	-	-	-	-	15	8	27
Malaysia	65	-	-	-	103	-	348	-	24
Australia	-	-	-	-	-	-	-	-	18
Belgium	160	-	-	-	-	14	-	3	-
China, Taipei	734	-	-	-	-	-	-	-	-
Honduras	-	47	-	-	-	-	-	-	-
Denmark	158	-	-	16	-	196	-	54	-
Dominican Republic	-	-	-	20	-	28	-	-	-
Indonesia	-	-	-	-	103	-	98	62	-
Israel	-	-	-	-	-	100	15	-	-
Lebanon	-	-	-	-	-	98	-	-	-
Lithuania	-	-	-	-	-	-	16	306	-
Netherlands	10	-	-	-	45	-	42	39	-
Netherlands Antilles	-	-	-	-	-	-	4	219	-
Nicaragua	-	-	-	-	8	-	-	-	-
Poland	-	-	-	-	12	-	-	-	-

Table 7 (continued). United States exports of sablefish by country of destination, by value, 1981-2013 (U.S. \$1,000).

	2000	2001	2002	2003	2004	2005	2006	2007	2008
Portugal	83	-	465	-	-	273	-	245	-
Romania	-	-	-	-	-	27	-	-	-
Serbia-Montenegro	-	-	17	-	-	-	-	-	-
Spain	1,993	-	-	1,762	536	4	7	12	-
St.Kittis-Nevis	-	-	-	-	-	-	5	-	-
Switzerland	-	-	-	-	-	536	6	18	-
Venezuela	2662	-	-	-	-	-	-	-	-
Viet Nam	-	-	-	-	-	-	348	-	-
Bulgaria	-	-	-	-	-	28	-	-	-
Total	85,580	55,259	46,765	67,457	87,880	71,748	78,394	63,557	74,269

Table 7 (continued). United States exports of sablefish by country of destination, by value, 1981-2013 (U.S. \$1,000).

	2009	2010	2011	2012	2013
Japan	77,982	63,155	81,287	81,434	71,098
Hong Kong	4,720	5,900	7,006	8,636	7,218
Russian Federation	727	698	3,256	1,665	2,768
China	2,301	1,679	3,518	1,936	2,456
Canada	1,748	1,312	1,937	1,601	2,263
Singapore	1,178	1,421	1,285	2,036	1,817
United Kingdom	418	634	544	1,240	1,037
Thailand	137	179	749	550	979
Australia	243	247	615	278	798
United Arab Emirates	-	401	767	631	753
France	-	316	871	164	679
South Korea	988	767	532	1,186	633
Netherlands	253	766	511	84	509
Indonesia	273	-	143	106	371
Philippines	260	404	-	431	349
Ukraine	52	17	-	46	346
Brazil	-	-	-	-	256
Belgium	-	-	-	-	212
Italy	49	105	-	124	211
Germany	234	209	228	257	192
Mexico	84	108	149	44	110
Israel	6	11	12	12	79
Spain	154	-	-	269	70
Switzerland	-	5	28	11	67
Viet Nam	-	130	200	542	65
Kazakhstan	-	-	-	-	29
Fed States of Micron	-	-	-	-	23
Bahama	-	-	16	-	-
China, Taipei	80	165	-	-	-
Denmark	365	-	205	333	-
Lebanon	-	-	90	-	-
Lithuania	15	-	-	-	-
Malaysia	174	120	135	-	-
New Zealand	-	-	-	9	-
Portugal	-	-	-	68	-
South Africa	-	-	14	-	-
Sweden	-	-	-	5	-
Total	92,440	78,749	104,100	103,698	95,198

- zero exports

Totals may not add due to rounding of data

Source: U.S. Department of Commerce 1982-2014

Table 8. Canada's exports of sablefish by country of destination, by volume, 1992-2013 {metric tons}.

	1992	1993	1994	1995	1996	1997	1998	1999
Japan	2,488	3,374	2,773	2,583	2,089	2,277	2,134	2,085
Hong Kong	321	535	335	302	114	269	144	194
United States	-*	-	-	14	1	95	98	163
United Kingdom	-	-	-	-	-	-	19	135
Spain	-	-	-	-	-	-	-	59
China	-	-	-	1	-	-	-	44
Singapore	-	2	2	2	2	2	30	39
Mexico	-	-	-	-	-	-	-	38
Switzerland	-	-	-	-	-	-	-	1
Malaysia	-	-	1	-	-	-	-	-
Korea, Dem. People's Rep. of	-	-	-	-	13	-	-	-
Korea, Rep. of	17	-	-	-	-	-	-	-
Philippines	-	-	-	18	7	5	-	-
Taiwan	-	-	3	-	-	-	-	-
Australia	-	-	20	-	-	-	-	-
Cuba	-	-	-	6	-	-	-	-
Norway	-	-	-	-	-	19	-	-
Sweden	-	-	-	-	-	-	8	-
St. Pierre-Miquelon	-	-	-	-	-	-	-	-
Netherlands	-	-	-	-	-	-	-	-
Total**	2,826	3,912	3,135	2,924	2,227	2,667	2,433	2,758

Table 8 (continued). Canada's exports of sablefish by country of destination, by volume, 1992-2013 (metric tons).

	2000	2001	2002	2003	2004	2005	2006	2007
Japan	1,646	1197	980	833	1330	1688	2076	1635
United States	100	135	124	149	101	339	230	183
United Kingdom	-	5	-	16	17	9	5	14
Italy	-	-	-	-	-	-	-	1
China	34	46	10	4	14	19	14	8
Hong Kong	65	96	71	92	35	64	58	10
United Arab Emirates	-	-	-	-	-	-	-	-
Viet Nam	-	-	-	-	-	-	-	-
Taiwan	-	-	-	0	0	-	0	1
Germany	-	-	-	-	-	-	16	-
Australia	-	-	-	-	-	-	-	-
Netherlands	-	-	-	-	-	-	-	-
Switzerland	-	-	-	-	-	-	-	-
Bergium	-	-	-	-	-	-	-	-
Bermuda	-	-	-	-	-	-	-	-
France	-	-	-	-	-	-	-	-
Indonesia	-	-	11	-	-	-	0	3
Jordan	-	-	-	-	-	-	-	21
Kiribati	-	-	-	-	-	-	-	3
Korea, South	46	-	-	-	-	2	1	-
Malaysia	7	-	8	-	-	-	-	-
Mexico	-	-	-	-	-	-	0	-
Philippines	-	-	-	-	-	-	2	-
Russian Federation	-	-	-	-	-	-	-	-
Singapore	8	24	18	-	-	9	10	9
South Africa	-	-	-	-	-	-	-	-
Thailand	-	-	-	-	-	-	5	-
Ukraine	-	-	-	-	-	-	-	8
Total**	1,905	1504	1,221	1,196	1,494	2,131	2,417	1,897

Table 8. Canada's exports of sablefish by country of destination, by volume, 1992-2013 (metric tons).

	2008	2009	2010	2011	2012	2013
Japan	1,549	1334	1123	893	795	797
United States	146	100	325	744	637	161
United Kingdom	54	55	106	90	149	78
Italy	13	9	-	-	14	20
China	-	-	4	12	67	20
Hong Kong	40	19	11	-	18	10
United Arab Emirates	5	11	18	24	12	10
Viet Nam	-	-	-	-	-	5
Taiwan	-	0	-	-	3	2
Germany	-	1	1	-	-	0
Australia	-	-	-	-	0	0
Netherlands	-	-	-	-	-	0
Bergium	-	-	-	-	9	-
Bermuda	0	-	-	-	-	-
France	5	4	2	4	-	-
Korea, South	-	0	-	0	-	-
Russian Federation	-	-	-	9	-	-
South Africa	-	-	-	-	4	-
Thailand	-	-	0	-	1	-
Ukraine	-	-	0	7	0	-
Total**	1,817	1,533	1,594	1,848	1,709	1,105

0 Less than one metric ton; -... zero exports

** Totals may not add due to rounding of data

Source: Department of Fisheries and Oceans 2000-2014

Table 9. Canada's exports of sablefish by country of destination, by value, 1992-2013 (Canadian \$1,000).

	1992	1993	1994	1995	1996	1997	1998	1999
Japan	18,353	22,270	22,127	29,981	23,568	23,501	18,943	21,583
Hong Kong	3,107	4,517	3,656	3,694	1,517	3,534	1,763	2,461
United States	-*	-	5	130	16	1,281	1,031	1,908
United Kingdom	-	-	-	-	-	-	187	1,207
Spain	-	-	-	-	-	-	-	396
China	-	-	-	11	-	-	-	410
Singapore	7	28	28	34	31	17	335	527
Mexico	-	-	-	-	-	-	-	264
Switzerland	-	-	-	-	-	-	-	10
Malaysia	-	-	12	-	-	-	-	-
Korea, D.P. Rep.	-	-	-	-	154	-	-	-
Korea, Rep. of	24	-	-	-	-	-	-	-
Philippines	-	-	-	42	15	12	-	-
Taiwan	-	-	6	-	-	-	-	-
Australia	-	1	66	-	-	-	-	-
Cuba	-	-	-	18	-	-	-	-
Norway	-	-	-	-	-	57	-	-
Sweden	-	-	-	-	-	-	79	-
St. Pierre-Miquelon	-	-	-	2	-	-	-	-
Netherlands	-	2	-	-	-	-	-	-
Total**	21,491	26,824	32,894	33,912	25,303	31,401	22,338	28,767

Table 9 (continued). Canada's exports of sablefish by country of destination, by value, 1992-2013 (Canadian \$1,000).

	2000	2001	2002	2003	2004	2005	2006	2007
JAPAN	20,464	15,373	12,549	10,257	12,203	15,265	19,704	14,359
UNITED STATES	1,470	1,464	1,484	2,225	1,172	2,869	2,283	1,955
JORDAN	-	-	-	106	-	-	-	216
UNITED KINGDOM	-	47	-	261	273	123	74	178
SINGAPORE	96	389	314	94	-	123	152	145
UKRAINE	-	-	-	-	-	-	-	124
HONG KONG	988	1,523	1,126	-	439	712	681	90
CHINA	146	161	64	14	185	225	98	52
KOREA, SOUTH	192	-	-	49	-	9	6	29
FRANCE	-	-	-	-	-	-	1	25
ITALY	-	-	-	-	-	-	-	18
TAIWAN	-	-	-	-	-	-	5	17
AUSTRALIA	-	-	-	-	-	-	-	-
BELGIUM	-	-	-	-	-	-	-	-
BERMUDA	-	-	-	-	-	-	-	-
INDONESIA	-	-	110	-	-	-	-	-
KIRIBATI	-	-	-	-	229	-	-	-
MALAYSIA	46	-	137	-	-	-	-	-
MEXICO	-	-	-	-	-	-	2	-
NETHERLANDS	-	-	-	-	-	-	-	-
PHILIPPINES	-	-	-	98	-	-	26	-
RUSSIAN FEDERATION	-	-	-	-	-	-	-	-
SOUTH AFRICA	-	-	-	-	-	-	-	-
SWITZERLAND	-	-	-	-	-	-	-	-
THAILAND	-	-	-	262	-	-	50	-
UNITED ARAB EMIRATES	-	-	-	-	-	-	-	-
VIET NAM	-	-	-	-	-	-	-	-
Total	23,404	18,958	15,784	14,931	14,275	19,325	23,310	17,208

Table 9 (continued). Canada's exports of sablefish by country of Destination, by value, 1992-2013 (Canadian \$1,000).

	2008	2009	2010	2011	2012	2013
JAPAN	15,685	16,777	14,092	13,084	11,020	9,402
UNITED STATES	1,741	1,343	1,531	1,268	3,024	1,193
JORDAN	-	-	1,235	1,392	1,441	495
UNITED KINGDOM	620	680	-	-	-	332
SINGAPORE	-	-	61	399	931	235
UKRAINE	-	-	325	399	246	171
HONG KONG	533	272	148	802	239	111
CHINA	-	-	-	-	-	58
KOREA, SOUTH	-	-	-	-	33	29
FRANCE	60	51	12	-	-	20
ITALY	165	120	-	-	-	5
TAIWAN	-	-	-	-	-	3
AUSTRALIA	-	-	-	-	-	2
BELGIUM	-	-	-	-	159	-
GERMANY	-	11	30	38	-	-
MALAYSIA	-	1	-	-	-	-
MEXICO	-	-	-	1	-	-
SOUTH AFRICA	-	-	-	196	-	-
THAILAND	-	-	-	-	47	-
UNITED ARAB EMIRATES	127	173	2	-	12	-
VIET NAM	-	-	35	77	5	-
Total	18,932	19,427	17,471	17,657	17,474	12,057

- zero exports;

Totals may not add due to rounding of data

Source: Department of Fisheries and Oceans 2000-2014

SUPPLY

Japan is the world's largest market for sablefish, consuming an average of 26,900 mt of sablefish or 88 percent of the world's sablefish production during 1987-2012 (Tables 1 and 10). Nearly 87 percent of U.S. sablefish catch and 84 percent of Canadian sablefish catch were used to supply the Japanese market during the same period. In 2012, the combined catches of the two countries totaled 21,015 mt, with the United States accounting for 18,734 mt (89 percent). Japanese imports from the two countries totaled approximately 14,425 mt in round weight equivalent that year. Current Japanese demand for sablefish is supplied entirely by imports.

Table 10. Japanese imports of sablefish in round weight*, 1987-2013 (metric tons).

Country of origin	1987	1988	1989	1990	1991	1992	1993
U.S.A.	40,897	43,144	41,327	37,439	33,156	27,379	36,020
Canada	4,253	4,869	5,059	4,337	5,039	4,187	4,598
Argentina	-**	-	-	-	-	2	-
Mexico	-	299	-	-	178	235	59
Korea, Rep.	33	6	16	52	3	198	-
New Zealand	-	-	-	-	-	21	-
Morocco	-	27	-	14	-	-	-
Korea, D.P.Rp.	-	-	29	-	-	-	-
Hong Kong	44	-	-	-	-	-	-
Total ***	45,306	48,496	46,585	41,975	38,528	32,149	40,818

Table 10 (continued). Japanese imports of sablefish in round weight*, 1987-2013 (metric tons).

Country of Origin	1994	1995	1996	1997	1998	1999	2000
U.S.A.	28,668	28,285	26,266	19,911	20,541	20,068	19,222
Canada	4,606	3,741	3,482	3,131	4,240	4,153	3,123
Uruguay	-	-	-	-	-	38	-
China	-	-	-	-	-	25	-
Argentina	-	-	-	-	-	24	-
Russia	-	6	6	-	-	2	5
Mexico	-	-	13	46	84	-	-
Thailand	2	-	-	-	-	-	-
Pakistan	-	-	13	-	-	-	-
Senegal	-	-	13	-	-	-	-
Total ***	33,416	32,146	29,899	23,184	24,992	24,437	22,350

Country of origin	2001	2002	2003	2004	2005	2006	2007
U.S.A	18,531	16,816	17,430	20,610	17,362	17,455	17,186
Canada	3,465	2,442	1,950	2,866	3,912	3,273	2,924
China	60	65	16	35	46	35	329
Russia	5	71	57	27	17	17	2
Mexico	-	37	37	-	17	86	25
Thailand	-	-	-	2	-	-	-
Bangladesh	-	5	-	-	-	-	-
Iceland	-	-	-	-	-	-	6
Total **	22,061	19,431	9,490	23,540	21,354	20,866	20,472

Table 10 (continued). Japanese imports of sablefish in round weight*, 1987-2013 (metric tons).

Country of origin	2008	2009	2010	2011	2012	2013
U.S.A.	15,508	14,932	13,334	12,502	13,210	12,148
Canada	2,407	1,842	1,449	1,173	1,215	1,117
Russia	2	3	5	1	1	-
Mexico	-	-	3	-	-	-
Total	17,917	16,777	14,790	13,676	14,426	13,265

* Estimated using conversion factors of 1.540 for Canada and 1.587 for the United States and other countries to convert the dressed weight to round weight

** zero imports

*** Totals may not add due to rounding of data

Sources: U.S. Department of Commerce, 1994-2014
 Department of Fisheries and Ocean 1996-2014
 Japan Marine Products Importers Association 1988-2000

CONSUMPTION

Sablefish is a popular fish in Japan. It is sold in retail stores for home consumption in steak and fillet form, and as "kasuzuke" (marinated in Japanese rice wine lees). It is prepared in various ways for the table by the Japanese. The most popular dish is fish stew, which typically consists of sliced fish, vegetables, and soup stock. The dish is consumed primarily during the winter months. Sablefish steaks and fillet, as well as kasuzuke, are also used in grilled, broiled, or baked form and consumed year round. Sablefish may be used as "sashimi" (thinly sliced raw fish), especially in northern Japan, but it is not used in smoked, dried, or canned form.

MARKET

Frozen dressed sablefish is usually sold directly to licensed buyers, with a set price at production-center wholesale markets located at Japanese ports of landings and consumer-center wholesale markets located in cities with populations of more than 200,000. Sablefish is also sold directly to processors, chain supermarkets, and department stores. The largest consumer fish wholesale market is the Tokyo Central Wholesale Market. In 2013, this market handled about 515,000 mt of fishery products valued at about \$4.6 billion (Tokyo Metropolitan Government). It therefore plays an important role in providing information on the supply and demand of fishery products in Japan. Also, the wholesale price determined in the Tokyo Central Wholesale Market frequently serves as a price index for fishery products throughout the world. Between 1987 and 2013, an average of 37 percent (6,252 mt) of Japanese imports of frozen dressed sablefish were sold at the Tokyo Central Wholesale Market (Figure 5, Tables 3 and 11).

Wholesale prices for frozen dressed sablefish vary widely, depending on quality, size of fish, origin, supply, prices of competitive fish products, dollar-yen exchange rate, and other factors. Table 12 shows monthly and annual average wholesale prices of frozen dressed sablefish at the Tokyo Central Wholesale Market from 1986 through 2013. The average prices fluctuated considerably during that period, ranging from a low of 677 yen/kg to a high of 1,838 yen/kg and fluctuations were influenced mainly by volume of total available supply in Japan. As is usually the case, the greater the supply, the lower the price (Figure 6).

Sablefish competes in the market with Patagonian toothfish (called "mero" in Japanese), which has a similar oil content (Shokuryo Shinbun Sha January 21, 2000 and Hokkai Keizai Shinbun Sha February 23, 2000). Japanese imports of Patagonian toothfish are listed under "mero". Japanese imports of "mero" in 2013 totaled 2,054 mt (1,952 mt of dressed mero and 102 mt of fillets) valued at \$20 million (Table 13). Total supply of "mero" for 2013 decreased about 14 percent from the 2,382 mt imported in 2012.

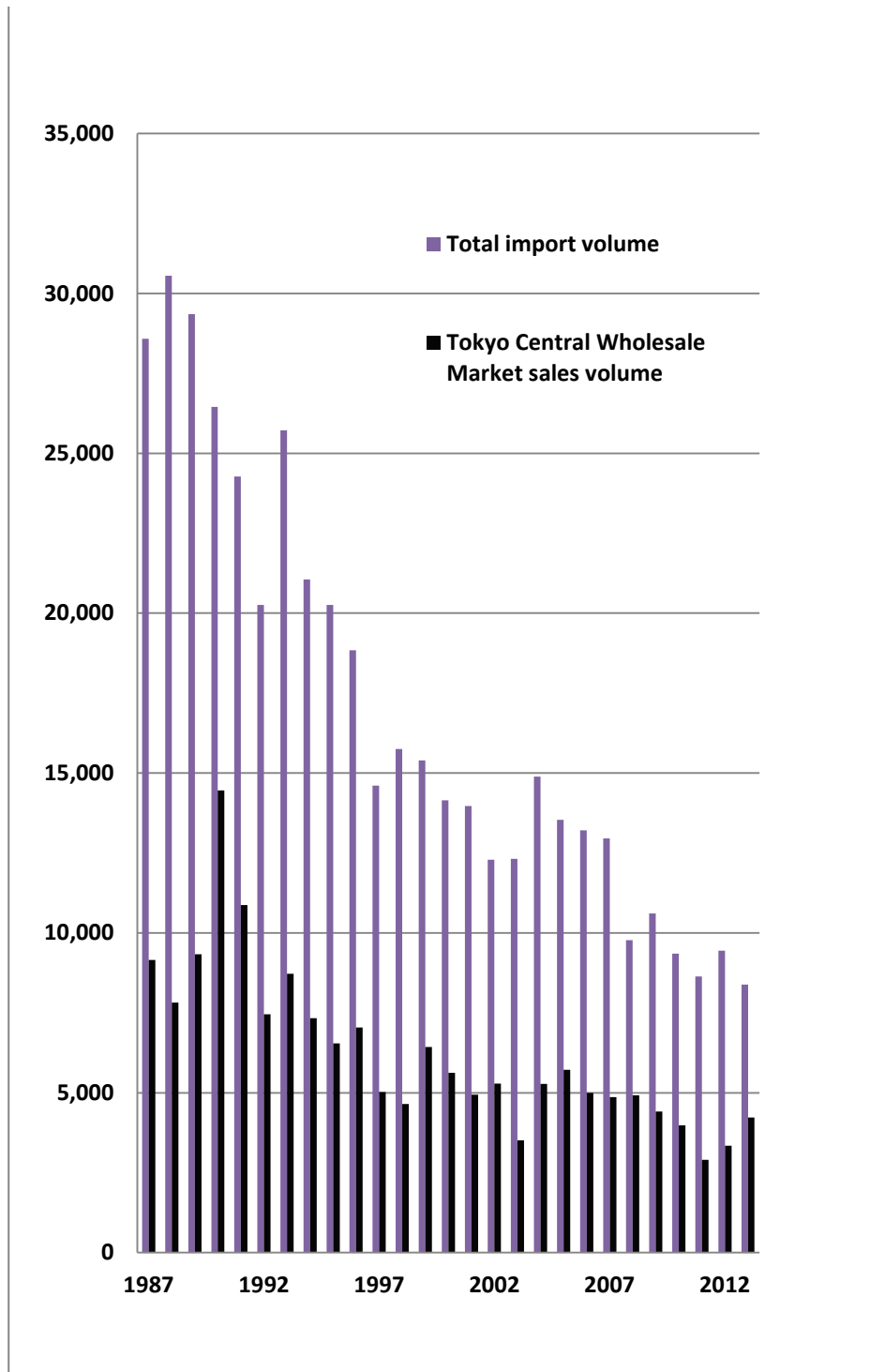


Figure 5. Japanese annual import volumes and annual sales volumes of frozen dressed sablefish at Tokyo Central Wholesale Market, 1987-2013 (metric tons).

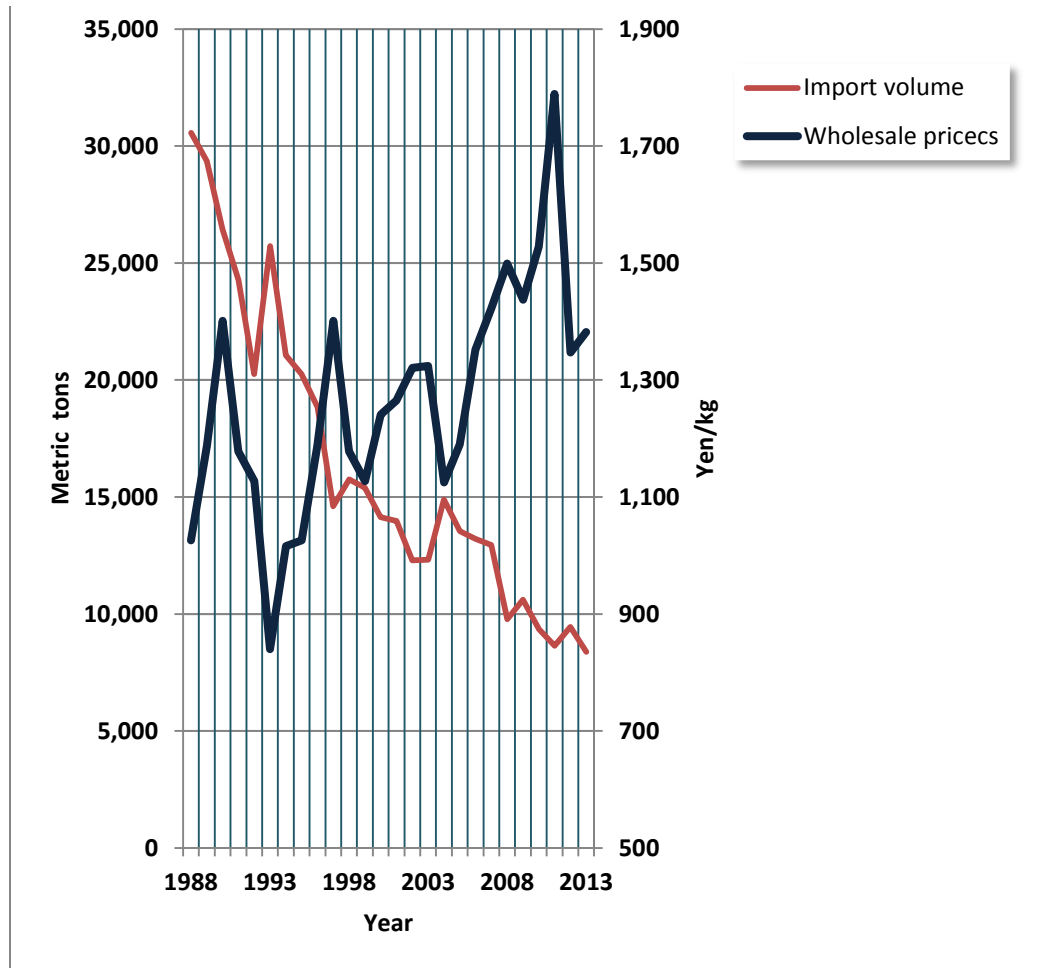


Figure 6. Japanese annual import volumes and average wholesale prices of sablefish at Tokyo Central Wholesale Market, 1988-2013.

Table 11. Monthly and annual sales volume of frozen dressed sablefish at Tokyo Central Wholesale Market, 1986-2013 (metric tons).

Month	1986	1987	1988	1989	1990	1991	1992
Jan.	383	472	452	801	869	806	522
Feb.	369	406	653	643	1,161	388	359
Mar.	381	448	781	789	580	229	600
Apr.	420	388	415	492	428	398	515
May	634	1,016	617	700	2,131	668	414
June	929	950	909	1,142	2,638	1,189	967
July	958	1,527	721	610	1,781	2,340	1,137
Aug.	781	831	978	1,227	583	1,329	471
Sept.	814	903	894	895	873	1,793	639
Oct.	1,077	1,251	429	597	1,224	862	734
Nov.	610	613	371	641	1,165	401	547
Dec.	509	344	595	791	1,023	467	547
Total*	7,866	9,149	7,816	9,329	14,452	10,870	7,452

Month	1993	1994	1995	1996	1997	1998	1999
Jan.	810	596	561	720	382	325	494
Feb.	1,131	527	349	546	355	304	426
Mar.	631	458	452	454	334	331	474
Apr.	815	658	458	523	465	405	723
May	475	375	662	695	536	392	629
June	745	611	419	569	384	326	772
July	722	1,190	553	466	478	515	484
Aug.	716	883	498	518	574	478	335
Sept.	785	431	598	774	531	358	285
Oct.	547	800	824	820	333	360	628
Nov.	711	516	614	559	311	394	590
Dec.	629	589	554	402	343	458	594
Total*	8,718	7,335	6,542	7,046	5,026	4,646	6,435

Table 11 (continued). Monthly and annual sales volume of frozen dressed sablefish at Tokyo Central Wholesale Market, 1986-2013 (metric tons).

Month	2000	2001	2002	2003	2004	2005	2006
Jan.	521	461	515	286	295	376	293
Feb.	484	335	334	182	304	352	385
Mar.	483	285	295	228	323	404	418
Apr.	404	311	390	366	357	621	563
May	411	505	417	431	299	479	384
June	458	444	593	261	372	628	359
July	694	316	503	301	512	805	434
Aug.	299	323	366	250	420	433	427
Sept.	464	375	509	265	516	454	422
Oct.	587	393	538	306	778	436	376
Nov.	377	422	465	304	709	376	452
Dec.	443	768	362	335	387	349	480
Total*	5,625	4,938	5,288	3,516	5,273	5,715	4,992

Month	2007	2008	2009	2010	2011	2012	2013
Jan.	496	412	288	320	240	206	371
Feb.	392	378	308	360	208	198	280
Mar.	480	506	351	298	192	193	305
Apr.	372	350	367	306	201	197	363
May	431	482	344	283	222	178	281
June	427	439	369	382	356	248	346
July	331	476	337	307	322	244	343
Aug.	323	142	308	364	284	265	301
Sept.	306	421	314	303	236	342	385
Oct.	496	456	564	376	268	366	378
Nov.	423	286	443	379	194	417	504
Dec.	392	301	419	302	181	486	366
Total*	4,868	4,920	4,410	3,981	2,903	3,339	4,223

Table 12. Monthly and annual average wholesale prices of frozen dressed sablefish at Tokyo Central Wholesale Market, 1986-2013 (yen/kg).

Month	1986	1987	1988	1989	1990	1991	1992
Jan.	1,019	801	842	788	834	1,348	1,336
Feb.	975	798	797	821	880	1,452	1,293
Mar.	877	780	812	837	908	1,463	1,190
Apr.	759	739	821	820	966	1,263	1,149
May	688	677	797	804	852	1,129	1,101
June	685	682	782	773	874	1,024	1,036
July	694	689	755	783	939	1,035	1,041
Aug.	713	757	785	775	968	1,175	1,022
Sept.	742	813	829	796	968	1,288	962
Oct.	764	884	854	788	1,007	1,370	943
Nov.	777	910	830	816	1,046	1,349	929
Dec.	815	879	801	811	1,164	1,316	880
Jan.-Dec.	764	771	804	799	936	1,204	1,058

Month	1993	1994	1995	1996	1997	1998	1999
Jan.	873	813	1,168	1,074	1,367	1,328	1,022
Feb.	884	925	1,183	1,124	1,379	1,289	1,009
Mar.	908	1,137	1,120	1,106	1,377	1,252	1,008
Apr.	913	1,286	1,076	1,121	1,436	1,232	1,037
May	921	1,147	1,029	1,151	1,457	1,240	1,117
June	867	942	934	1,154	1,397	1,219	1,195
July	831	901	939	1,159	1,359	1,157	1,214
Aug.	771	996	940	1,169	1,389	1,186	1,203
Sept.	787	1,060	974	1,235	1,438	1,181	1,180
Oct.	790	1,094	999	1,282	1,435	1,096	1,152
Nov.	761	1,089	1,033	1,341	1,386	1,040	1,180
Dec.	752	1,109	983	1,341	1,357	1,011	1,211
Jan.-Dec.	840	1,016	1,026	1,188	1,401	1,178	1,127

**Table 12 (continued). Monthly and annual average wholesale
Prices of frozen dressed sablefish at Tokyo Central
Wholesale Market, 1986-2013 (yen/kg).**

Month	2000	2001	2002	2003	2004	2005	2006
Jan.	1,222	1,298	1,285	1,407	1,290	1,155	1,275
Feb.	1,233	1,288	1,315	1,415	1,236	1,145	1,262
Mar.	1,265	1,336	1,316	1,372	1,205	1,093	1,311
Apr.	1,340	1,326	1,292	1,329	1,158	1,071	1,341
May	1,287	1,258	1,300	1,328	1,110	1,137	1,382
June	1,199	1,255	1,270	1,348	1,077	1,161	1,368
July	1,206	1,254	1,318	1,350	1,066	1,203	1,372
Aug.	1,258	1,242	1,298	1,299	1,051	1,247	1,356
Sept.	1,195	1,232	1,302	1,305	1,066	1,280	1,372
Oct.	1,227	1,230	1,363	1,258	1,086	1,279	1,379
Nov.	1,255	1,238	1,397	1,281	1,139	1,261	1,388
Dec.	1,254	1,258	1,418	1,253	1,164	1,312	1,392
Jan.-Dec.	1,241	1,265	1,321	1,324	1,125	1,190	1,352

Month	2007	2008	2009	2010	2011	2012	2013
Jan.	1,378	1,436	1,458	1,406	1,648	1,709	1,251
Feb.	1,398	1,441	1,475	1,431	1,746	1,698	1,299
Mar.	1,395	1,435	1,442	1,440	1,816	1,682	1,331
Apr.	1,404	1,454	1,470	1,505	1,820	1,614	1,327
May	1,411	1,457	1,472	1,546	1,804	1,585	1,364
June	1,445	1,509	1,457	1,503	1,785	1,417	1,335
July	1,464	1,530	1,441	1,553	1,805	1,303	1,365
Aug.	1,439	1,522	1,429	1,534	1,811	1,208	1,389
Sept.	1,443	1,555	1,402	1,561	1,767	1,177	1,403
Oct.	1,430	1,571	1,421	1,567	1,813	1,147	1,431
Nov.	1,443	1,564	1,413	1,599	1,829	1,165	1,479
Dec.	1,478	1,547	1,387	1,692	1,838	1,209	1,541
Jan.-Dec.	1,423	1,499	1,437	1,528	1,789	1,347	1,382

Totals may not add due to rounding of data

Source: Tokyo Metropolitan Government 1987-2014

Table 13. Japanese imports of frozen mero (*Dissostichus eleginoides*) 2012-2013.

Country of origin	2012		2013	
	Volume (Metric tons)	Value (U.S. \$1,000)	Volume (Metric tons)	Value (U.S. \$1,000)
Dressed:				
Korea, Rep.	172	3,437	139	2,529
Norway	-	-	9	62
U.K.	-	-	64	467
France	295	6,126	24	471
Spain	73	723	125	1,171
Russia	-	-	14	254
Ukraine	26	383	33	323
Chile	363	4,383	389	4,638
Uruguay	23	392	5	57
Argentina	161	1,665	131	825
Falkland	47	546	29	231
St. Helena	83	878	118	765
Reunion	144	2,266	312	2,658
S. Africa	31	334	39	296
Australia	899	10,687	757	6,967
New Zealand	48	834	46	292
Cook Island	57	552	-	-
Total, dressed*	2,290	31,167	1,952	19,695
Fillets:				
Spain	-	-	3	12
Ukraine	-	-	1	7
Chile	31	180	21	74
Argentina	39	302	56	369
Falkland	6	34	3	15
St. Helena	2	6	7	23
S. Africa	3	15	2	6
Australia	11	71	9	42
Total, fillets*	92	608	102	548

* Totals may not add due to rounding of data

Source: Ministry of Finance 2014.

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Appendix 1. Monthly and annual average exchange rate applied to Japanese imports, 1976-2013 (yen/U.S. \$1.00).

Month	1976	1977	1978	1979	1980	1981	1982
Jan.	305.50	292.64	240.73	195.98	237.68	203.99	221.36
Feb.	302.84	288.41	241.46	199.16	240.35	203.44	231.15
Mar.	301.50	282.49	236.94	203.39	247.44	207.80	237.03
Apr.	299.30	275.91	222.99	210.87	252.39	211.99	246.01
May	299.00	277.66	225.36	217.81	238.71	217.18	237.25
June	299.83	275.79	222.54	219.83	221.44	223.89	243.66
July	296.89	267.78	205.17	217.24	217.95	226.55	256.07
Aug.	292.81	265.70	191.18	216.13	224.85	236.35	257.18
Sept.	288.18	267.14	190.94	220.54	219.10	230.26	258.60
Oct.	288.43	261.78	187.76	225.41	210.18	229.15	268.14
Nov.	294.12	249.13	184.41	238.48	211.28	230.56	272.81
Dec.	295.68	241.87	196.54	244.62	212.85	218.15	250.33
Jan.-Dec.	296.92	270.53	212.17	217.46	227.85	219.94	248.30

Month	1983	1984	1985	1986	1987	1988	1989
Jan.	232.89	233.83	252.04	202.07	159.01	126.01	125.64
Feb.	237.03	233.98	256.66	193.53	152.70	128.57	128.49
Mar.	235.99	228.79	260.53	180.21	153.47	128.72	128.00
Apr.	238.61	225.10	254.49	178.62	146.97	125.64	132.12
May	235.43	227.48	251.36	167.08	139.91	124.76	133.78
June	238.48	231.56	250.26	169.29	142.58	125.23	143.06
July	239.93	238.69	246.22	163.17	147.81	131.40	141.60
Aug.	242.70	243.69	237.92	155.04	150.83	133.12	140.29
Sept.	244.80	243.02	239.20	154.66	143.02	134.21	145.10
Oct.	236.15	246.68	221.43	154.23	144.59	132.58	142.58
Nov.	234.22	244.08	209.32	160.34	138.52	125.36	142.67
Dec.	234.81	246.07	202.60	162.73	132.65	122.21	143.83
Jan.-Dec.	237.59	236.91	240.17	170.08	146.01	128.15	137.26

Appendix 1 (continued). Monthly and annual average exchange rate applied to Japanese imports, 1976-2013 (yen/U.S. \$1.00).

Month	1990	1991	1992	1993	1994	1995	1996
Jan.	144.36	135.27	126.21	124.66	111.79	100.25	104.49
Feb.	144.93	130.97	125.47	123.98	109.23	99.19	106.38
Mar.	148.61	134.02	130.46	117.95	105.04	94.49	105.32
Apr.	156.99	137.68	133.37	115.05	104.47	86.99	107.07
May	157.09	137.71	132.77	110.81	103.07	83.75	106.02
June	159.28	139.05	128.15	107.97	104.29	84.96	108.19
July	151.95	138.85	125.61	108.16	99.55	85.46	109.55
Aug.	148.90	137.00	126.99	105.38	99.57	90.73	107.84
Sept.	142.96	136.24	124.36	104.37	99.25	98.48	108.78
Oct.	133.82	131.72	121.03	105.79	98.97	100.88	110.99
Nov.	128.31	130.47	122.71	107.80	97.41	101.56	112.86
Dec.	130.86	129.14	124.11	108.35	99.22	101.51	112.70
Jan.-Dec.	145.67	134.84	126.77	111.69	102.66	94.02	108.35

Month	1997	1998	1999	2000	2001	2002	2003
Jan.	115.60	130.98	114.09	103.76	115.37	131.00	119.73
Feb.	121.26	125.90	115.02	107.05	116.56	133.31	119.26
Mar.	122.38	127.35	119.88	108.29	118.10	131.90	118.09
Apr.	124.29	130.84	119.55	106.02	123.97	132.07	119.62
May	123.99	132.33	120.21	107.38	122.56	128.73	118.54
June	114.98	138.65	121.52	108.36	120.93	124.86	117.74
July	114.08	140.47	121.56	106.34	124.40	120.11	118.34
Aug.	117.18	143.44	115.95	108.70	123.50	118.45	119.32
Sept.	119.44	138.58	110.21	106.71	119.97	118.99	117.28
Oct.	121.18	129.32	106.34	107.88	119.40	123.20	111.41
Nov.	122.27	118.14	105.21	108.14	121.73	122.52	109.18
Dec.	127.90	120.26	103.73	110.67	124.35	122.81	108.63
Jan. - Dec.	120.38	131.36	114.44	107.80	121.57	125.61	116.41

Appendix 1 (continued). Monthly and annual average exchange rate applied to Japanese imports, 1976-2013 (yen/U.S. \$1.00).

Month	2004	2005	2006	2007	2008	2009	2010
Jan.	106.93	103.68	116.08	119.16	110.68	90.65	91.55
Feb.	106.03	103.89	116.98	120.95	106.90	90.03	90.18
Mar.	109.08	104.83	117.45	118.49	104.50	96.38	90.09
Apr.	106.23	107.11	117.58	118.27	100.69	98.89	92.55
May	110.38	106.10	113.60	119.57	103.90	97.83	92.98
June	111.07	107.91	112.68	121.62	105.22	96.22	91.31
July	108.74	110.58	115.33	122.97	106.96	95.19	89.09
Aug.	110.46	111.53	115.83	119.01	108.23	94.97	86.37
Sept.	109.72	110.22	116.76	115.14	108.33	93.01	84.66
Oct.	110.25	113.25	117.99	116.00	103.87	90.00	83.42
Nov.	106.61	116.66	118.13	113.73	97.97	90.56	81.39
Dec.	103.68	119.49	116.62	110.50	93.53	88.35	83.61
Jan.-Dec.	108.28	109.64	116.25	117.93	104.23	93.52	88.09

Month	2011	2012	2013
Jan.	82.91	76.96	89.06
Feb.	82.33	78.47	93.00
Mar.	82.35	82.47	94.77
April	82.93	81.25	97.76
May	81.51	79.66	100.96
June	80.94	79.32	97.24
July	77.88	78.93	99.67
Aug.	80.40	78.69	97.81
Sept.	76.95	78.14	99.21
Oct.	78.70	79.01	97.77
Nov.	77.29	81.03	100.07
Dec.	77.59	83.79	103.46
Jan.-Dec.	79.97	79.82	97.60

Sources: Japan Marine Products Importers Association 1977-2000
Ministry of Finance, Japan 2014