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# Japan

# Livestock and Products Semi-annual

# 2010 Japanese Beef and Pork Market Outlook

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**Report Highlights:**
Total Japanese beef consumption in 2010 is projected to be around 1.21 million MT, unchanged from last year. Imports are expected to increase by 1% to 702,000 MT (U.S. beef to 102,000 MT). Japan's total pork consumption is projected to decline by 1% to 2.46 million MT. An ample supply of domestic pork will limit prospects for imports although expected to increase by 1% to 1.15 million MT (Pork cuts: up by 1% to 923,000 MT, Processed/Prepared Pork: up by 1% to 228,000 MT).

**Commodities:**
Meat, Beef and Veal
Animal Numbers, Cattle
Meat, Swine
Animal Numbers, Swine

**Author Defined:**

## Preface

This report is an update to the last livestock annual report, **JA9056**.

Quantities listed in the text are made on the basis of Carcass Weight Equivalent – CWE (unless specified otherwise). Numbers shown in some of the inserted tables are by product weight basis before being converted to CWE.

Conversion rates from the product weight to CWE are:
Beef Cuts (Boneless) – 1.40
Pork Cuts (Boneless) – 1.30
Processed/Prepared Beef Products – 1.79
Processed/Prepared Pork Products – 1.30

**Japan Beef Market 2010 Outlook (Revised)**

- Market Continues to Remain Price and Value Sensitive

The basic underlying market trends for beef and pork described in the 2009 livestock annual report have not changed. The deflationary trend that began last year is expected to continue in 2010 making the prospects for an economic recovery, which has already been hindered by income and job uncertainties, even less promising.

Amidst the situation described above, total Japanese beef consumption in 2010 is projected to be around 1.21 million MT, unchanged from last year. However, the market is expected to see a small but continued increase in imports, projected up by 1% to 702,000 MT, resulting from lower market prices for imported cuts. This will likely offset the small reduction anticipated in domestic beef production, which is projected down by 1% to 510.000 MT. The estimate for year ending stocks is just marginally below last year's level at 118,000 MT (See Table III-a).

Following the previous year's trend, consumers will continue to seek value cuts and lower priced products for daily use rather than more expensive cuts in 2010. Beef imports are a bright spot in the Japanese market as growth is expected to continue as long as the yen holds strong.

- Access for U.S. Beef Continues to be Limited by the EV Program

U.S. beef remains subject to a number of regulatory hurdles under the Export Verification (EV) program, which has had a limiting effect on the total volume of U.S. beef entering Japan. If the current restrictions remain in place through 2010, U.S. beef will be constrained from meeting full market potential although there will be some growth in the market. As of this time bilateral talks between the United States and Japan have not led to a normalization of the beef trade. Nevertheless, there is strong market demand for U.S. beef and full access through a lifting of beef restrictions would certainly result in increased exports. Similarly the Export Verification Program for Canadian beef is having a similar effect; leaving a void in supply that has been filled by beef from other sources such as Australia.

- Total Beef Imports Forecast Up in 2010

Given the better than expected results for beef imports in 2009, post has raised projections for 2010 modestly from the forecast made in the last livestock annual report. Total beef imports in 2010 are projected up by 1% from last year to 702,000 MT (Beef cuts: 679,000 MT, up by 1%, Processed/Prepared Beef: 23,000 MT, unchanged). Specific to the trade in beef cuts, American and Canadian grain fed beef is expected to show a modest sales expansion due to lower market prices. A shift in preference to American beef and the taste of grain fed beef is expected with U.S. beef substituting for Aussie chilled grass fed / frozen grain fed cuts this year. Furthermore, it will likely also support Japan's purchase of relatively high priced U.S. loin cuts in addition to some popular value cuts like short plate and chuck items.

Recognizing this favorable situation, post has raised 2010 projections for U.S. beef up by 12% to 102,000 MT (PWE 73,000 MT) and Canadian beef up by 33% to 16,8,00 MT (PWE 12,000 MT). The projection for Aussie beef has been lowered by 1% from a year ago to 504,000 MT (PWE 360,000 MT). Japanese demand for Aussie chilled grain beef will remain strong due to the price competitiveness of the product and the wide availability of cuts. The lack of age restrictions on Australian beef, which are placed on U.S. and Canadian beef, has been a boon Australian beef exports.  Ground beef items, mostly Aussie grass fed cuts, should continue doing well this year with the current popularity of hamburger dishes.

- Total Domestic Production Forecast to Lower in 2010

Post projects domestic beef production will be slightly lower than last year at 510,000 MT (or 1.22 million heads) in 2010.  Although a high level of *Wagyu* slaughters will be sustained at least this year, they will likely be offset by the modestly reduced slaughter of dairy breeds.  The prevailing deflationary trend will continue hurting domestic producers this year as market prices for their product is expected to remain weak.  The market demand for domestic beef continues to be concentrated in less expensive cuts.  Note:  The latest data for beginning cattle inventory in 2010, including the past calf crop data, has not yet been announced.

- GOJ to Extend Special Measure for JFY 2010 Beef Safeguard

The triggering of the beef safeguard (for both chilled and frozen) is not foreseen during Japanese fiscal year 2010 (April 1, 2010 – March 31, 2011) at the projected level of imports.  Under the new government administration, the GOJ is expected to implement yet another year long extension of the "special measure for the beef safeguard", which will give a preferential calculation of trigger levels for JFY 2010.  Note:  Although the extension of the above measure has already been decided at the Cabinet meeting held last December, final approval by the Diet is expected in a session to be held around March this year.  Note:  the measure initiated in 2006 will help encourage the unfortunately slow recovery of the overall beef market from BSE related turmoil that has taken place since 2003.  Note:  Imports of U.S. beef continue to be limited by the EV program and a surge of total beef imports is not expected during any specific quarter in JFY 2010 (See Supplemental Table II).

## 2009 Beef Market Situation Summary (New)

- Lower Market Prices Attributable to Increased Consumption amid Recession in 2009

Despite the economic recession, Japan’s total beef consumption in 2009 rose 3% over last year to an estimated 1.21 million MT.  This modest expansion was largely supported by lower market prices for beef.  The price situation encouraged sales in the retail and the food service sector that have been hit by the recession, particularly the value segment -- fast food service including hamburger and barbecue chains, and convenience stores featuring beef lunch boxes and ground beef paddy dishes.  The average quantity of beef purchased by households for January through December 2009 was up 4% by quantity while down 3% by value from the previous year.  Also, the quantity of ground meat (including ground beef) purchased rose 5% from the previous year while maintaining the same rate by value. (See Supplemental Table I). As for the foods service situation, sales at Western style fast food chains including fast food hamburger chains reportedly increased 2% percent from the last year.

<u>- Strong Yen a Major Factor Attributing to Increased Imports in 2009</u>

A rapid appreciation of Japanese Yen against other major currencies has been a major contributing factor in the import growth of beef in 2009 effectively lowering import prices and partially offsetting the high beef tariff (38.5%). For example, the yen / dollar exchange rate averaged around 94 yen to1 U.S. dollar in CY 2009, supporting imports of U.S. beef. The annual average import price of beef in 2009 fell 12% from the previous year at USD 4.14/Kg. Accordingly, for most imported beef cuts, the average wholesale prices showed double digit declines helping to lift beef consumption in 2009 (See Supplemental Tables IV-b, IV-c).

According to the latest trade data, total Japanese beef imports in 2009 were up 6% from last year at 697,000 MT (Beef Cuts: up 5% to 673,000 MT, Processed/Prepared: up 30% to 23,000 MT). The numbers were better than post's conservative forecast in the last annual report and reached the highest levels since 2004 (See Tables 2-a, 2-b, 2-c, and 2-d).

Specifically for beef cuts, imports of American beef shot up 28% to 96,870 MT and Canadian beef also jumped 81% to 12,790 MT in 2009 from a year ago despite the continuation of strict limitations under the EV program (allowing only beef cuts derived from animals 20 months of age or younger). Japanese clients reportedly were attracted by the lower priced grain fed beef supplied by the United States and Canada primarily focusing on the value cuts - short plate, some chuck items such as chuck rib, and other product - for beef bowl/barbecue chains and retail/convenience chains. Furthermore, in 2009 some hotels and restaurants have started to promote American steaks using the relatively expensive loin cuts.

Aussie beef comprised the majority of imports in 2009 total sharing 76% at 509, 470 MT, up 2% from last year. According to export data, chilled grain fed beef to Japan in 2009 apparently did very well showing a 10% rise from a year before, but was offset by reduced chilled grass fed cuts (down 4%), frozen grain fed (down 10%) and frozen grass fed (down 7%). A trade source reported that exports lower than the previous year for frozen grass fed cuts was mainly due to a temporary stock adjustments at the beginning of the year due to remaining stocks of Aussie cuts purchased at very high prices in the previous year (See Table 1). Also, the demand for inexpensive frozen grass fed cuts used for manufacturing a low- priced artificial steak (so called dice steak) reportedly shrank in 2009 following a food safety incident (0-157 incident detected from the finished product).

- Domestic Beef Hard Hit by Low Market Prices in 2009

On a preliminary basis, in 2009 the total domestic production in Japan was 517,000 MT (with slaughters at 1.228 million head), down 1% from the previous year. Increased *Wagyu* and F-1 cross breed slaughters were slightly more than offset by reduced Holstein slaughters (steers and cows combined). Affected by the state of economy, the market demands for domestic beef also fared well for inexpensive cuts, but stagnated for relatively high priced cuts throughout most of the year resulting in a strong downward pressure on average wholesale market prices across breeds (See Supplemental Table IV-a). A market source reported that sales for the year ending showed a moment of recovery, but was not sustained.

## Japan Pork Market 2010 Outlook (Revised)

- Ample Pork Supplies to Continue in 2010

The general market outlook and previously anticipated trends for 2010 - weak consumption relative to supply - portrayed in post's last livestock annual report still holds valid. Thus an ample supply of domestic pork will continue to limit prospects for imported pork, particularly chilled cuts, which were significantly reduced in the previous year. On the other hand, a significant reduction in the total imports in the previous year helped to effectively run down the high level of frozen stocks to an estimated 217,000 MT by year end in 2009, down 8% from the beginning of the year (See Supplemental Table III-b). Solid sales of processed pork products are expected to be sustained in 2010, which will allow imports of frozen raw material pork to be utilized in the processing sector.

- Pork Consumption to Remain Weak in 2010

Japan's total pork consumption in 2010 is projected to decline by 1% from last year to 2.46 million MT; a relatively high level of consumption that despite plentiful supplies of the domestic pork will support only a slight reduction in total production in 2010 projected at 1.30 million MT (or 16.88 million head). The projected level may not be quite enough to eliminate Japan's existing surplus that has existed since last year. Thus, similar to the previous year, overall market prices for domestic pork at the wholesale level (both carcass and pork cuts) will remain low and competitive with international prices.

In response to relatively low market prices for domestic pork, MAFF (the Ministry of Agriculture, Forestry and Fisheries) has been implementing a domestic pork buy-out and storage measure to raise wholesale prices since last fall (October 2009 – March 2010). For further details please see the 2009 situation summary section. So far, the above measure has only been partially effective in keeping the price level above the floor price of 400 Yen/kg after market prices surged momentarily during seasonal sales at the end of the last year. In addition, post noted that MAFF created a subsidy scheme last fall to help hog producers replace old sow stocks so that the number of piglets reaching a finishing age this fall are reduced in comparison with last year. At the present point in time, it is uncertain if these surplus trimming measures can effectively reduce total hog slaughter in 2010 (Sow numbers for the year have yet to be announced.).

- A Slight Increase in Total Pork Imports Projected in 2010

Given the above, the potential for imports to recover in 2010 is limited. Post projected Japan's total pork imports in 2010 to increase somewhat, by 1% from last year to 1.15 million MT (Pork cuts: up by 1% to 923,000 MT, Processed/Prepared Pork: up by 1% to 228,000 MT). The projected increase takes into account some demand for stock replenishing likely to be generated by the processing sector for frozen stocks.

For pork cuts, post raised the projection for Danish pork, a major frozen supplier, at 169,000 MT up by 6% from last year, but left the numbers almost unchanged for U.S. pork at 377,000 MT and Canadian pork at 221,000 MT because, similar to last year, some U.S. and Canadian chilled pork cuts may be affected by the increased availability of domestic pork cuts, which have become fairly price competitive. On the other hand, it is likely that Japan's processors will import some frozen cuts from the United States, Canada, Denmark and other suppliers for stock replenishment assuming the market demand for processed pork products stays solid as expected in 2010. For the same reason, post raised the number for processed/prepared imports up slightly from last year. U.S. seasoned ground pork is projected at 149,500 MT, up 3% from last year assuming a continuation of the strong yen (See Note).

[Note: Unlike pork cuts, which are subject to the pork differential duty system (the gate price system), the import duty for seasoned ground pork is under an ad-valorem duty. In theory, when the Japanese yen is strong against the U.S. dollar or other currencies, importing inexpensive raw material frozen pork cuts will become difficult without paying a large differential duty, but favor seasoned ground pork. This is supposed to be true even with mixed combinations of high priced and low priced cuts.]

- Pork Safeguard Triggering Unlikely in JFY 2010

Given the state of surplus and at the projected level of imports, a triggering of the pork safeguard is not foreseen in Japanese fiscal year (JFY) 2010 for any specific quarter. The trigger levels calculated by post for JFY 2010 are based on the preliminary results of JFY 2009 [All Customs Clearance Basis - 1st quarter (April – June); 224,488 MT, 1st – 2nd quarter (April – September); 434,398, and 1st – 3rd quarter (April – December); 645,089 MT] are slightly lower than the level of the previous year, but look sufficient [Note: Calculation of the trigger level for pork is made by taking the quarterly cumulative average from the three preceding years (JFY 2007, 2008 and 2009) and then multiplying by 1.19 (119%)] (See Supplemental Table II)

## 2009 Pork Market Situation Summary (New)

- Increased Domestic Pork Supply Created a Major Surplus in 2009

With consumption somewhat weaker than last year, a significant surplus due to an unprecedented rise in domestic pork output became a major concern for the Japanese pork market in 2009. Total domestic hog and the pork outputs surged in 2009, up 5% from the previous year to a total of 1.31 million MT (or 16.965 million heads)**;** an unprecedented rise for a single year due to: 1) producer speculation in anticipation of good market prices similar to 2007 and 2008; 2) a reduced mortality rate for piglets stemming from the use of a newly approved vaccine. Consequently, lower market prices for domestic pork in addition to government intervention to reduce domestic pork supplies eventually resulted in higher demand and tighter supplies (See note). The average wholesale price of domestic pork, carcass and various cuts, on an annual basis showed mostly double digit declines ranging from 15 – 25% from the previous year (See V-a, V-b and V-c).

[Note: As the average wholesale price of domestic pork carcass declined remaining below a floor level of 400 yen/kg during the second half (the standard stabilization price, an official parameter for an estimated break even point for hog producers), MAFF (the Ministry of Agriculture, Forestry and Fisheries) announced the start of the “Supply Adjustment Measure for Storing Domestic Pork”, which took effect mid-October 2009. Under the program up to 70,000 head (with a budget of JPY 1.8 billion) are to be bought out and stored in an attempt to shore up average market prices beyond the floor by the end of March this year. The measure will be implemented from October 2009 through March 2010 by the ALIC (Agriculture & Livestock Industry Corporation, which is affiliated 100% with MAFF) and cooperation from relevant industries. Specifically, ALIC will ask participating farm cooperatives and ham/sausage manufacturers to buy out and store surplus pork for a certain period of time and will provide the cold storage charge, and possible price discount incurred for freezing fresh cuts after releasing the stored pork back to the market.]

Thus, as actual production and trade numbers started to become available for 2009, substantial adjustments were made in the post forecast PS&D numbers for pork from the previous livestock annual report.

- Total Pork Consumption Lowered in 2009

On a preliminary basis, total Japanese pork consumption in 2009 was down 1% from the previous year reaching an estimated 2.469 million MT. Despite ample supplies of low priced pork, demand from the food service sector slumped. Competition with other low priced commodities such as chicken and beef (including hamburger and ground beef products) was fairly intense while the sector reportedly suffered overall from reduced sales. On the other hand, the retail sector response to prices was reportedly positive and stayed solid for pork and processed pork products. For Jan. – Dec., 2009, the quantity of pork purchased by the average household rose 2% while expenditures fell 3%. For processed pork products, purchased quantities also increased; ham; up 2%, sausages; up 3%, bacon; up 1% and ground meat including ground pork up 7% while the corresponding expenditures were either down or remained unchanged from the previous year (See Supplemental Table I).

- Total Imports Deeply Slashed in 2009

Abundant supplies of domestic pork cuts, which were priced fairly low, virtually flooded the market in 2009. This consequently had a negative impact on imports that have already been impacted by increased stocks at the beginning of the year (See Supplemental Table III-b). The situation resulted in a significant cut back in total pork imports in 2009, which were down 10% from the year before at 1.14 million MT (Pork Cuts: down 14% to 914,000 MT**,** Processed/Prepared: up 10% to 225,000 MT – A plunge in imports of pork cuts was partially offset by a rise in imports of processed/prepared products (See Tables 3-a, 3-b, and 3-c). With intense competition from low priced imported pork, the market price of imported pork appears to have lost its competitive edge (both chilled and frozen) and stayed weak throughout the year (See Supplemental Tables V-e, V-d)

Specific to pork cuts, Japanese imports of American pork dipped to 375,270 MT, down 14% with a total share of 41% (Chilled cuts: down 10% to 220,920 MT, Frozen Cuts; down 20% to 154,350 MT). The reduction in U.S. cuts, however, was partially offset by an 18% hike (or 145,010 MT) of seasoned ground pork imports under the processed/prepared products category (See Table 3-d). Canadian pork did relatively well with imports down 1% to 224,090 MT (Chilled cuts, down 17% to 68,720 MT, Frozen Cuts, up 8% to 155,370 MT). Danish pork (mostly frozen for processing and food service) was also down 23% to 159,800 MT. Most EU pork suppliers to Japan followed suit as Japanese importers cut back their purchases of frozen raw material cuts in 2009.

## - Sausage Imports to Grow in 2009

Although not included in post's PS&D estimates, post noted that sausage imports in 2009 were up 11% reaching 40,735 MT. While China held a 51% share of the total (or 20,645 MT), products from the United States, Thailand and Brazil made substantial inroads into this value and price conscious market, up 23%, 83% and 35% respectively for the year.

Table 1 Australian Beef Exports to Japan

| Australian Beef Exports to Japan | | | | | | | |
|---|---|---|---|---|---|---|---|
| | | | | | | | Metric Ton (On Board Vessel Basis) |
| Annual | 2007 | 2008 | % Chg | 08 Share | 2009 | % Chg | 09 Share |
| | Jan/Dec | Jan/Dec | Jan/Dec | Jan/Dec | Jan/Dec | Jan/Dec | Jan/Dec |
| **Chilled Beef** | **185,141** | **160,648** | **-13%** | **100%** | **168,928** | **5%** | **100%** |
| Grass | 62,331 | 57,659 | -7% | 36% | 55,217 | -4% | 33% |
| Grain fed | 122,810 | 102,989 | -16% | 64% | 113,711 | 10% | 67% |
| **Frozen Beef** | **192,722** | **203,654** | **6%** | **100%** | **187,638** | **-8%** | **100%** |
| Grass | 144,081 | 157,460 | 9% | 77% | 146,162 | -7% | 78% |
| Grain fed | 48,641 | 46,194 | -5% | 23% | 41,476 | -10% | 22% |
| **TOTAL** | **377,863** | **364,302** | **-4%** | **100%** | **356,567** | **-2%** | **100%** |
| Grass | 206,412 | 215,119 | 4% | **59%** | 201,379 | -6% | 56% |
| Grain fed | 171,451 | 149,183 | -13% | **41%** | 155,187 | 4% | 44% |
| Source: Meat Livestock Australia (Table compiled by post) | | | | | | | |

Table 2-a) Japanese Beef Imports, Chilled and Frozen Combined, CY 2007 - 2009

| Beef, Chilled and Frozen - Japan with Ports - Imports | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | **Unit: Metric Ton (Customs Clearance Basis)** |
| | | | | | **% Change** | **Share** |
| **Rank** | **Country** | **2007** | **2008** | **2009** | **- 09/08 -** | **- 09 -** |
| | | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** |
| 0 | --World-- | 473,652 | 458,024 | 481,136 | 5% | 100% |
| 1 | Australia | 393,828 | 358,229 | 363,907 | 2% | 76% |
| 2 | United States | 34,147 | 54,109 | 69,192 | 28% | 14% |
| 3 | New Zealand | 33,710 | 30,792 | 29,558 | -4% | 6% |
| 4 | Mexico | 7,256 | 9,341 | 9,629 | 3% | 2% |
| 5 | Canada | 3,368 | 4,712 | 8,527 | 81% | 2% |
| 6 | Others | 1,344 | 841 | 323 | -62% | 0% |
| Source of data: Japan Customs (World Trade Atlas) | | | | | | |

Table 2-b) Japanese Beef Imports, Chilled, CY 2007 - 2009

| Beef, Chilled - Japan with Ports - Imports | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | **Unit: Metric Ton (Customs Clearance Basis)** |
| | | | | | **% Change** | **Share** |
| **Rank** | **Country** | **2007** | **2008** | **2009** | **- 09/08 -** | **- 09 -** |
| | | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** |
| 0 | --World-- | 216,059 | 199,485 | 212,727 | 7% | 100% |

| | | | | | | |
|---|---|---|---|---|---|---|
| 1 | Australia | 188,151 | 159,157 | 168,577 | 6% | 79% |
| 2 | United States | 17,815 | 31,142 | 34,535 | 11% | 16% |
| 3 | New Zealand | 6,181 | 5,769 | 6,057 | 5% | 3% |
| 4 | Canada | 2,168 | 2,032 | 2,472 | 22% | 1% |
| 5 | Mexico | 1,740 | 1,381 | 1,086 | -21% | 1% |
| 6 | Others | 4 | 3 | 0 | -100% | 0% |
| Source of data: Japan Customs (World Trade Atlas) | | | | | | |

## Table 2-c) Japanese Beef Imports, Frozen, CY 2007 - 2009

| **Beef, Frozen - Japan with Ports - Imports** | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | **Unit: Metric Ton (Customs Clearance Basis)** |
| | | | | | **% Change** | **Share** |
| **Rank** | **Country** | **2007** | **2008** | **2009** | **- 09/08 -** | **- 09 -** |
| | | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** |
| 0 | --World-- | 257,593 | 258,540 | 268,408 | 4% | 100% |
| 1 | Australia | 205,676 | 199,072 | 195,330 | -2% | 73% |
| 2 | United States | 16,333 | 22,967 | 34,658 | 51% | 13% |
| 3 | New Zealand | 27,529 | 25,023 | 23,501 | -6% | 9% |
| 4 | Mexico | 5,516 | 7,959 | 8,543 | 7% | 3% |
| 5 | Canada | 1,200 | 2,680 | 6,055 | 126% | 2% |
| 6 | Others | 1,340 | 838 | 323 | -62% | 0% |
| Source of data: Japan Customs (World Trade Atlas) | | | | | | |

## Table 2-d) Japanese Beef Imports, Processed/Prepared Products, CY 2007 - 2009

| **Processed Prepared Beef - Japan with Ports - Imports** | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | **Unit: Metric Ton (Customs Clearance Basis)** |
| | | | | | **% Change** | **Share** |
| **Rank** | **Country** | **2007** | **2008** | **2009** | **- 09/08 -** | **- 09 -** |
| | | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** |
| 0 | --World-- | 12,960 | 9,883 | 12,901 | 31% | 100% |
| 1 | Australia | 6,332 | 4,335 | 5,802 | 34% | 45% |
| 2 | Brazil | 1,738 | 2,500 | 4,393 | 76% | 34% |
| 3 | China | 2,973 | 1,514 | 1,831 | 21% | 14% |
| 4 | Others | 1,917 | 1,534 | 874 | -43% | 7% |
| Source of data: Japan Customs (World Trade Atlas) | | | | | | |

## Table 3-a) Japanese Pork Imports, Chilled and Frozen Combined, CY 2007 - 2009

| **Pork, Chilled and Frozen - Japan with Ports - Imports** | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | **Unit: Metric Ton (Customs Clearance Basis)** |
| | | | | | **% Change** | **Share** |
| **Rank** | **Country** | **2007** | **2008** | **2009** | **- 09/08 -** | **- 09 -** |
| | | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** |
| 0 | --World-- | 760,398 | 817,691 | 702,936 | -14% | 100% |
| 1 | United States | 270,642 | 336,993 | 288,669 | -14% | 41% |
| 2 | Canada | 165,620 | 174,686 | 172,373 | -1% | 25% |
| 3 | Denmark | 161,356 | 159,784 | 122,923 | -23% | 17% |
| 4 | Mexico | 48,346 | 56,551 | 43,682 | -23% | 6% |
| 5 | Chile | 45,997 | 23,777 | 26,172 | 10% | 4% |
| 6 | Hungary | 8,103 | 10,206 | 10,094 | -1% | 1% |

| | | | | | | |
|---|---|---|---|---|---|---|
| 7 | Netherlands | 8,441 | 10,089 | 9,397 | -7% | 1% |
| 8 | France | 9,177 | 7,205 | 8,023 | 11% | 1% |
| 9 | Spain | 13,057 | 16,102 | 7,871 | -51% | 1% |
| 10 | Austria | 10,684 | 8,116 | 5,082 | -37% | 1% |
| 11 | Others | 18,975 | 14,182 | 8,650 | -39% | 1% |
| Source of data: Japan Customs (World Trade Atlas) | | | | | | |

## Table 3-b) Japanese Pork Imports, Chilled, CY 2007 - 2009

| **Pork, Chilled - Japan with Ports - Imports** | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | **Unit: Metric Ton (Customs Clearance Basis)** |
| | | | | | **% Change** | **Share** |
| **Rank** | **Country** | **2007** | **2008** | **2009** | **- 09/08 -** | **- 09 -** |
| | | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** |
| 0 | --World-- | 235,028 | 267,968 | 233,738 | -13% | 100% |
| 1 | United States | 160,560 | 188,454 | 169,935 | -10% | 73% |
| 2 | Canada | 58,970 | 63,904 | 52,860 | -17% | 23% |
| 3 | Mexico | 14,487 | 14,928 | 10,640 | -29% | 5% |
| 4 | Others | 1,010 | 683 | 302 | -56% | 0% |
| Source of data: Japan Customs (World Trade Atlas) | | | | | | |

## Table 3-c) Japanese Pork Imports, Frozen, CY 2007 - 2009

| **Pork, Frozen - Japan with Ports - Imports** | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | **Unit: Metric Ton (Customs Clearance Basis)** |
| | | | | | **% Change** | **Share** |
| **Rank** | **Country** | **2007** | **2008** | **2009** | **- 09/08 -** | **- 09 -** |
| | | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** |
| 0 | --World-- | 525,371 | 549,723 | 469,198 | -15% | 100% |
| 1 | Denmark | 161,329 | 159,703 | 122,923 | -23% | 26% |
| 2 | Canada | 106,650 | 110,782 | 119,513 | 8% | 25% |
| 3 | United States | 110,082 | 148,539 | 118,733 | -20% | 25% |
| 4 | Mexico | 33,859 | 41,623 | 33,041 | -21% | 7% |
| 5 | Chile | 45,967 | 23,777 | 26,172 | 10% | 6% |
| 6 | Hungary | 8,103 | 10,206 | 10,094 | -1% | 2% |
| 7 | Netherlands | 8,441 | 10,089 | 9,397 | -7% | 2% |
| 8 | France | 9,159 | 7,173 | 8,006 | 12% | 2% |
| 9 | Spain | 13,011 | 16,054 | 7,841 | -51% | 2% |
| 10 | Austria | 10,684 | 8,116 | 5,082 | -37% | 1% |
| 11 | Others | 18,086 | 13,661 | 8,396 | -39% | 2% |
| Source of data: Japan Customs (World Trade Atlas) | | | | | | |

## Table 3-d) Japanese Pork Imports, Processed/Prepared Products, CY 2007 - 2009

| **Processed Prepared Pork - Japan with Ports - Imports** | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | **Unit: Metric Ton (Customs Clearance Basis)** |
| | | | | | **% Change** | **Share** |
| **Rank** | **Country** | **2007** | **2008** | **2009** | **- 09/08 -** | **- 09 -** |
| | | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** |
| 0 | --World-- | 170,472 | 157,308 | 172,603 | 10% | 100% |
| 1 | United States | 81,593 | 94,231 | 111,547 | 18% | 65% |
| 2 | China | 62,892 | 33,180 | 27,872 | -16% | 16% |

| | | | | | | |
|---|---|---|---|---|---|---|
| 3 | Canada | 9,150 | 12,334 | 14,728 | 19% | 9% |
| 4 | Thailand | 4,621 | 6,486 | 5,582 | -14% | 3% |
| 5 | Chile | 3,396 | 2,417 | 4,384 | 81% | 3% |
| 6 | Others | 8,820 | 8,660 | 8,490 | -2% | 5% |
| Source of data: Japan Customs (World Trade Atlas) | | | | | | |

## Table 4 Japanese Sausage Imports, CY 2007 - 2009

| **Sausage - Japan with Ports - Imports** | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | **Unit: Metric Ton (Customs Clearance Basis)** | |
| | | | | | **% Change** | **Share** |
| **Rank** | **Country** | **2007** | **2008** | **2009** | **- 09/08 -** | **- 09 -** |
| | | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** | **Jan/Dec** |
| 0 | --World-- | 43,392 | 36,810 | 40,735 | 11% | 100% |
| 1 | China | 30,267 | 20,775 | 20,645 | -1% | 51% |
| 2 | United States | 6,305 | 7,786 | 9,551 | 23% | 23% |
| 3 | Thailand | 1,738 | 2,783 | 5,083 | 83% | 12% |
| 4 | Brazil | 255 | 1,173 | 1,587 | 35% | 4% |
| 5 | Denmark | 1,637 | 1,638 | 1,300 | -21% | 3% |
| 6 | Others | 3,190 | 2,656 | 2,570 | -3% | 6% |
| Source of data: Japan Customs (World Trade Atlas) | | | | | | |

## Supplemental Tables

## I. Average Annual and Monthly Quantities and Expenditures of Beef, Pork, Chicken and Processed Meat Products Purchased per Household CY 2005 – 2009

| | **Beef** | | | | **Pork** | | | | **Chicken** | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **CY 2009** | **Expenditure/Yen** | | **Quantity/Gram** | | **Expenditure/Yen** | | **Quantity/Gram** | | **Expenditure/Yen** | | **Quantity/Gram** | |
| Jan. | 1,652 | -2% | 522 | -5% | 2,103 | 3% | 1,506 | 4% | 1,113 | 11% | 1,120 | 11% |
| Feb. | 1,400 | -14% | 496 | -5% | 2,046 | -4% | 1,513 | -1% | 1,027 | -3% | 1,050 | -2% |
| Mar. | 1,621 | -3% | 557 | -3% | 2,147 | 2% | 1,641 | 6% | 1,065 | 1% | 1,149 | 4% |
| Apr. | 1,509 | -8% | 556 | 4% | 2,013 | -4% | 1,523 | -1% | 1,033 | 0% | 1,075 | 5% |
| May | 1,765 | 2% | 609 | 5% | 2,069 | -2% | 1,539 | 0% | 1,059 | 2% | 1,155 | 11% |
| Jun. | 1,531 | -3% | 543 | 2% | 2,005 | -4% | 1,504 | 0% | 981 | -2% | 1,085 | 8% |
| July | 1,514 | -7% | 568 | 10% | 1,965 | -4% | 1,483 | 4% | 948 | 2% | 1,039 | 15% |
| Aug. | 1,858 | 1% | 646 | 6% | 1,998 | -6% | 1,477 | 0% | 912 | -3% | 984 | 7% |
| Sept. | 1,513 | -2% | 565 | 4% | 1,957 | -6% | 1,499 | 2% | 962 | -7% | 1,098 | 9% |
| Oct. | 1,582 | -1% | 603 | 9% | 2,129 | -2% | 1,638 | 6% | 1,067 | -4% | 1,222 | 12% |
| Nov. | 1,582 | -5% | 579 | 5% | 2,128 | -6% | 1,622 | -2% | 1,056 | -7% | 1,189 | 7% |
| Dec. | 2,639 | -1% | 801 | 13% | 2,230 | -3% | 1,694 | 4% | 1,391 | -6% | 1,483 | 8% |
| **CY 2008** | **20,885** | | **6,785** | | **25,555** | | **18,305** | | **12,830** | | **12,657** | |
| **CY 2009** | **20,166** | | **7,045** | | **24,790** | | **18,639** | | **12,614** | | **13,649** | |
| **% Chg.** | **-3%** | | **4%** | | **-3%** | | **2%** | | **-2%** | | **8%** | |
| Source: Ministry of Internal Affairs and Communication Bureau (Compiled from GOJ Statistical Data Base) | | | | | | | | | | | | |

| | **Ground Meat** | | | | **Ham** | | | | **Sausage** | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **CY 2009** | **Expenditure/Yen** | | **Quantity/Gram** | | **Expenditure/Yen** | | **Quantity/Gram** | | **Expenditure/Yen** | | **Quantity/Gram** | |
| Jan. | 164 | 12% | 139 | 6% | 312 | -13% | 169 | -4% | 519 | 3% | 385 | 5% |
| Feb. | 162 | -6% | 145 | -5% | 299 | -11% | 160 | -4% | 535 | -3% | 394 | 1% |
| Mar. | 183 | 8% | 163 | 1% | 354 | -7% | 189 | -3% | 610 | 1% | 446 | 4% |
| Apr. | 180 | -4% | 164 | -1% | 372 | -5% | 191 | -2% | 606 | -3% | 445 | 0% |
| May | 186 | 0% | 175 | 7% | 414 | -3% | 220 | 4% | 658 | 1% | 489 | 4% |
| Jun. | 182 | 0% | 167 | 2% | 471 | -7% | 254 | -1% | 591 | -1% | 436 | 0% |
| July | 176 | 7% | 164 | 15% | 585 | 0% | 307 | 3% | 585 | -2% | 436 | -1% |

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Aug. | 165 | -5% | 155 | 8% | 476 | -7% | 246 | -5% | 609 | -2% | 455 | 4% |
| Sept. | 169 | -4% | 161 | 7% | 356 | -5% | 191 | 0% | 612 | 0% | 459 | 2% |
| Oct. | 170 | -1% | 163 | 15% | 355 | -3% | 196 | 7% | 648 | 2% | 480 | 6% |
| Nov. | 153 | -2% | 142 | 4% | 498 | 2% | 263 | 11% | 605 | 1% | 443 | 2% |
| Dec. | 155 | -1% | 150 | 7% | 1,178 | 3% | 561 | 9% | 619 | 2% | 456 | 8% |
| **CY 2008** | **2,041** | | **1,795** | | **5,870** | | **2,887** | | **7,212** | | **5,175** | |
| **CY 2009** | **2,045** | | **1,888** | | **5,670** | | **2,947** | | **7,197** | | **5,324** | |
| **% Chg.** | **0%** | | **5%** | | **-3%** | | **2%** | | **0%** | | **3%** | |
| Source: Ministry of Internal Affairs and Communication Bureau (Compiled from GOJ Statistical Data Base) | | | | | | | | | | | | |

| | **Bacon** | | | |
|---|---|---|---|---|
| **CY 2009** | **Expenditure/Yen** | | **Quantity/Gram** | |
| Jan. | 181 | 4% | 106 | 7% |
| Feb. | 190 | -3% | 113 | 3% |
| Mar. | 207 | -6% | 119 | -1% |
| Apr. | 207 | -1% | 115 | 1% |
| May | 210 | -5% | 123 | 0% |
| Jun. | 204 | 0% | 123 | 4% |
| July | 197 | 7% | 118 | 12% |
| Aug. | 183 | -4% | 103 | -3% |
| Sept. | 194 | -6% | 113 | -4% |
| Oct. | 210 | 6% | 116 | 0% |
| Nov. | 202 | -3% | 119 | 4% |
| Dec. | 206 | -5% | 111 | -12% |
| **CY 2008** | **2,426** | | **1,369** | |
| **CY 2009** | **2,391** | | **1,379** | |
| **% Chg.** | **-1%** | | **1%** | |
| Source: Ministry of Internal Affairs and Communication Bureau (Compiled from Statistical GOJ Data Base) | | | | |

## II. Japanese Beef and Pork Safeguard Monitor, JFY 2009

| Beef Safeguard Trigger Levels for JFY 2009 and Actual Imports Year to Date (April 2009 – March 2010) | | | | | |
|---|---|---|---|---|---|
| | | | | | Unit: Metric Ton |
| **Chilled Beef** | **Trigger Level** | **Cum. Total** | | | |
| | **Quarterly Cum.** | **Actual Entry** | April | May | June |
| I (Apr. - Jun.) | **74,339** | **55,213** | 19,018 | 16,580 | 19,615 |
| | | | July | August | September |
| I - II (Apr. - Sept.) | **152,455** | **110,684** | 21,068 | 17,367 | 17,036 |
| | | | October | November | December |
| II - III (Apr. - Dec.) | **230,642** | **163,628** | 17,961 | 17,981 | 17,002 |
| | | | January | February | March |
| III - IV (Apr. - Mar.) | **292,354** | | 0 | 0 | 0 |
| | | | | | |
| **Frozen Beef** | **Trigger Level** | **Cum. Total** | | | |

| | Quarterly Cum. | Actual Entry | April | May | June |
|---|---|---|---|---|---|
| I (Apr. - Jun.) | **83,263** | **64,164** | 20,815 | 15,619 | 27,730 |
| | | | July | August | September |
| I - II (Apr. - Sept.) | **164,488** | **132,014** | 27,757 | 21,110 | 18,983 |
| | | | October | November | December |
| II - III (Apr. - Dec.) | **246,871** | **203,230** | 30,268 | 15,632 | 25,316 |
| | | | January | February | March |
| III - IV (Apr. - Mar.) | **323,924** | | 0 | 0 | 0 |
| Source: Ministry of Finance (ALIC Monthly) | | | | | |

| **Pork Safeguard Trigger Levels for JFY 2009 and Actual Imports Year to Date (April 2009 – March 2010)** | | | | | |
|---|---|---|---|---|---|
| | | | | | Unit: Metric Ton |
| | **Trigger Level** | **Cum. Total** | | | |
| | **Quarterly Cum.** | **Actual Entry** | April | May | June |
| I (Apr. - Jun.) | **233,663** | **172,956** | 59,527 | 56,592 | 56,837 |
| | | | July | August | September |
| I - II (Apr. - Sept.) | **448,131** | **324,982** | 57,549 | 48,164 | 46,313 |
| | | | October | November | December |
| II - III (Apr. - Dec.) | **666,791** | **480,348** | 50,686 | 48,084 | 56,596 |
| | | | January | February | March |
| III - IV (Apr. - Mar.) | **871,699** | | 0 | 0 | 0 |
| Source: Ministry of Finance (ALIC Monthly) | | | | | |

## III-a) Monthly Ending Beef Stocks, Frozen, CY 2006 – 2009

| | | | | | | | Unit: Metric Ton (Carcass Equivalent) |
|---|---|---|---|---|---|---|---|
| | **2006** | **2007** | **% Chg.** | **2008** | **% Chg.** | **2009** | **% Chg.** |
| Jan. | 86,628 | 106,942 | 23% | 101,830 | -5% | 114,384 | 12% |
| Feb. | 84,958 | 104,017 | 22% | 100,194 | -4% | 115,133 | 15% |
| Mar. | 90,222 | 106,968 | 19% | 101,938 | -5% | 110,956 | 9% |
| Apr. | 94,703 | 103,488 | 9% | 98,662 | -5% | 101,165 | 3% |
| May | 95,644 | 108,269 | 13% | 103,544 | -4% | 101,452 | -2% |
| Jun. | 102,873 | 112,503 | 9% | 104,682 | -7% | 108,608 | 4% |
| Jul. | 103,779 | 113,320 | 9% | 112,221 | -1% | 117,881 | 5% |
| Aug. | 100,678 | 113,883 | 13% | 116,736 | 3% | 120,725 | 3% |
| Sept.. | 98,438 | 112,468 | 14% | 122,966 | 9% | 122,319 | -1% |
| Oct. | 95,269 | 108,665 | 14% | 123,063 | 13% | 122,452 | -0% |
| Nov. | 104,160 | 106,582 | 2% | 120,012 | 13% | 124,414 | 4% |
| Dec. | 102,473 | 110,641 | 8% | 116,134 | 5% | 119,342 | 3% |
| Note: Data are only for carcass/cuts. Stock data - frozen offal and processed/prepared products - are not available. | | | | | | | |
| Source: ALIC Monthly Statistics | | | | | | | |

## III-b) Monthly Ending Pork Stocks, Frozen, CY 2007 – 2009

| | | | | | | | | Unit: Metric Ton (Carcass Equivalent) |
|---|---|---|---|---|---|---|---|---|
| **Month/Year** | **2006** | **% Chg.** | **2007** | **% Chg.** | **2008** | **% Chg.** | **2009** | **% Chg.** |
| Jan. | 271,825 | 23% | 229,237 | -16% | 215,210 | -6% | 242,187 | 13% |
| Feb. | 265,901 | 18% | 243,250 | -9% | 213,395 | -12% | 247,941 | 16% |
| Mar. | 272,463 | 18% | 240,609 | -12% | 221,711 | -8% | 252,377 | 14% |
| Apr. | 273,507 | 0% | 236,846 | -13% | 238,494 | 1% | 256,396 | 8% |
| May | 280,716 | -5% | 251,245 | -10% | 250,532 | -0% | 265,288 | 6% |
| Jun. | 278,803 | -6% | 244,873 | -12% | 242,774 | -1% | 268,905 | 11% |
| Jul. | 270,063 | -14% | 242,336 | -10% | 234,295 | -3% | 261,222 | 11% |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Aug. | 259,930 | -16% | 244,132 | -6% | 240,890 | -1% | 248,970 | 3% |
| Sept.. | 238,957 | -19% | 232,467 | -3% | 240,707 | 4% | 237,154 | -1% |
| Oct. | 226,429 | -24% | 226,330 | -0% | 240,872 | 6% | 228,019 | -5% |
| Nov. | 223,649 | -24% | 211,637 | -5% | 232,638 | 10% | 222,256 | -4% |
| Dec. | 220,984 | -19% | 207,802 | -6% | 237,377 | 14% | 217,071 | -9% |
| Note: Data are only for carcass/cuts. Stock data - frozen offal and processed/prepared products - are not available. | | | | | | | | |
| Source: ALIC Monthly Statistics | | | | | | | | |

## IV-a) Average Wholesale Price of Domestic Medium Grade Beef Carcass by Breed, CY 2006 – 2009

| | | | | | Unit: Yen per kilogram |
|---|---|---|---|---|---|
| **WAGYU STEER A-3 GRADE** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 1,957 | 1,986 | 1,975 | 2,004 | **1,981** |
| 2007 | 1,894 | 1,856 | 1,822 | 1,857 | **1,857** |
| %chg | -3% | -7% | -8% | -7% | **-6%** |
| 2008 | 1,807 | 1,639 | 1,577 | 1,575 | **1,650** |
| %chg | -5% | -12% | -13% | -15% | **-11%** |
| 2009 | 1,542 | 1,529 | 1,462 | 1,540 | **1,518** |
| %chg | -15% | -7% | -7% | -2% | **-8%** |
| **WAGYU STEER A-2 GRADE** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 1,723 | 1,711 | 1,656 | 1,616 | **1,676** |
| 2007 | 1,645 | 1,533 | 1,469 | 1,421 | **1,517** |
| %chg | -4% | -10% | -11% | -12% | **-9%** |
| 2008 | 1,539 | 1,339 | 1,265 | 1,197 | **1,335** |
| %chg | -6% | -13% | -14% | -16% | **-12%** |
| 2009 | 1,267 | 1,302 | 1,196 | 1,224 | **1,247** |
| %chg | -18% | -3% | -5% | 2% | **-7%** |
| **WAGYU Heifer A-3 GRADE** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 1,981 | 2,000 | 1,976 | 2,015 | **1,993** |
| 2007 | 1,901 | 1,865 | 1,834 | 1,879 | **1,870** |
| %chg | -4% | -7% | -7% | -7% | **-6%** |
| 2008 | 1,821 | 1,665 | 1,598 | 1,613 | **1,674** |
| %chg | -4% | -11% | -13% | -14% | **-10%** |
| 2009 | 1,578 | 1,563 | 1,476 | 1,543 | **1,540** |
| %chg | -13% | -6% | -8% | -4% | **-8%** |
| **Holstein Steer B-2 Grade** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 874 | 903 | 807 | 899 | **871** |
| 2007 | 826 | 779 | 716 | 730 | **763** |
| %chg | -5% | -14% | -11% | -19% | **-12%** |
| 2008 | 768 | 801 | 728 | 788 | **771** |
| %chg | -7% | 3% | 2% | 8% | **1%** |
| 2009 | 807 | 763 | 736 | 759 | **767** |
| %chg | 5% | -5% | 1% | -4% | **-1%** |
| **Holstein Cow C-2 GRADE** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 517 | 528 | 523 | 517 | **521** |
| 2007 | 506 | 534 | 532 | 488 | **515** |
| %chg | -2% | 1% | 2% | -6% | **-1%** |
| 2008 | 496 | 575 | 548 | 476 | **524** |
| %chg | -2% | 8% | 3% | -2% | **2%** |
| 2009 | 479 | 472 | 447 | 380 | **445** |
| %chg | -3% | -18% | -18% | -20% | **-15%** |
| **F1 Cross Breed Heifer B-3 GRADE** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |

| | | | | | |
|---|---|---|---|---|---|
| 2006 | 1,455 | 1,405 | 1,373 | 1,411 | **1,411** |
| 2007 | 1,354 | 1,308 | 1,280 | 1,309 | **1,313** |
| %chg | -7% | -7% | -7% | -7% | **-7%** |
| 2008 | 1,263 | 1,230 | 1,165 | 1,178 | **1,209** |
| %chg | -7% | -6% | -9% | -10% | **-8%** |
| 2009 | 1,116 | 1,106 | 1,072 | 1,103 | **1,099** |
| %chg | -12% | -10% | -8% | -6% | **-9%** |
| **F1 Cross Breed Heifer B-2 GRADE** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 1,277 | 1,213 | 1,110 | 1,185 | **1,196** |
| 2007 | 1,143 | 1,100 | 1,033 | 1,023 | **1,075** |
| %chg | -11% | -9% | -7% | -14% | **-10%** |
| 2008 | 1,054 | 1,041 | 937 | 903 | **984** |
| %chg | -8% | -5% | -9% | -12% | **-8%** |
| 2009 | 916 | 948 | 844 | 855 | **891** |
| %chg | -13% | -9% | -10% | -5% | **-9%** |
| **F1 Cross Breed Steer B-3 GRADE** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 1,487 | 1,449 | 1,438 | 1,462 | **1,461** |
| 2007 | 1,371 | 1,343 | 1,324 | 1,362 | **1,355** |
| %chg | -8% | -7% | -8% | -7% | **-7%** |
| 2008 | 1,287 | 1,256 | 1,211 | 1,238 | **1,252** |
| %chg | -6% | -6% | -9% | -9% | **-8%** |
| 2009 | 1,140 | 1,138 | 1,117 | 1,156 | **1,141** |
| %chg | -11% | -9% | -8% | -7% | **-9%** |
| **F1 Cross Breed Steer B-2 GRADE** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 1,308 | 1,247 | 1,158 | 1,229 | **1,236** |
| 2007 | 1,185 | 1,132 | 1,080 | 1,073 | **1,117** |
| %chg | -9% | -9% | -7% | -13% | **-10%** |
| 2008 | 1,085 | 1,064 | 977 | 956 | **1,020** |
| %chg | -8% | -6% | -10% | -11% | **-9%** |
| 2009 | 949 | 970 | 885 | 907 | **928** |
| %chg | -13% | -9% | -9% | -5% | **-9%** |
| Source: ALIC Monthly (Quarterly figures are compiled by post) | | | | | |

## IV-b) Average Wholesale Price of Imported Beef, Chilled Cuts, CY 2006 – 2009

| | | | | | |
|---|---|---|---|---|---|
| | | | | | Unit: Yen per Kilogram |
| **Full Set, Aussie Beef, Chilled, (Short Grain Fed)** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 949 | 904 | 903 | 966 | **930** |
| 2007 | 938 | 930 | 959 | 1,042 | **967** |
| %chg | -1% | 3% | 6% | 8% | **4%** |
| 2008 | 1,017 | 1,004 | 971 | 876 | **967** |
| %chg | 8% | 8% | 1% | -16% | **-0%** |
| 2009 | 730 | 746 | 755 | 743 | **744** |
| %chg | -28% | -26% | -22% | -15% | **-23%** |
| **Full Set, Aussie Beef, Chilled, (Grass Fed)** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 812 | 761 | 792 | 872 | **810** |
| 2007 | 854 | 817 | 817 | 861 | **837** |
| %chg | 5% | 7% | 3% | -1% | **3%** |
| 2008 | 856 | 771 | 846 | 739 | **803** |
| %chg | 0% | -6% | 4% | -14% | **-4%** |
| 2009 | 638 | 630 | 648 | 677 | **648** |
| %chg | -25% | -18% | -23% | -8% | **-19%** |
| **Navel-end Brisket, Aussie Beef, Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 703 | 696 | 753 | 743 | **724** |

| | | | | | |
|---|---|---|---|---|---|
| 2007 | 687 | 638 | 640 | 617 | **645** |
| %chg | -2% | -8% | -15% | -17% | **-11%** |
| 2008 | 652 | 598 | 728 | 622 | **650** |
| %chg | -5% | -6% | 14% | 1% | **1%** |
| 2009 | 573 | 640 | 604 | 576 | **598** |
| %chg | -12% | 7% | -17% | -7% | **-8%** |
| **Strip Loin, Aussie Beef, Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 1,495 | 1,333 | 1,294 | 1,315 | **1,360** |
| 2007 | 1,336 | 1,370 | 1,445 | 1,337 | **1,372** |
| %chg | -11% | 3% | 12% | 2% | **1%** |
| 2008 | 1,452 | 1,175 | 1,248 | 980 | **1,214** |
| %chg | 9% | -14% | -14% | -27% | **-12%** |
| 2009 | 1,042 | 989 | 1,068 | 1,078 | **1,044** |
| %chg | -28% | -16% | -14% | 10% | **-14%** |
| **Chuck-eye Roll, US Beef, Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 0 | 0 | 0 | 0 | **0** |
| 2007 | 0 | 0 | 0 | 910 | - |
| %chg | - | - | - | - | - |
| 2008 | 915 | 876 | 887 | 896 | **894** |
| %chg | - | - | - | -2% | - |
| 2009 | 799 | 732 | 703 | 725 | **740** |
| %chg | -13% | -16% | -21% | -19% | **-17%** |
| Source: ALIC Monthly (Quarterly figures are compiled by post) | | | | | |

## IV-c) Average Wholesale Price of Imported Beef, Frozen Cuts, CY 2006 – 2009

| | | | | | |
|---|---|---|---|---|---|
| | | | | | Unit: Yen per Kg. |
| **Chuck & Blade, Aussie Beef, Frozen** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 573 | 532 | 543 | 591 | **560** |
| 2007 | 575 | 568 | 563 | 551 | **564** |
| %chg | 0% | 7% | 4% | -7% | **1%** |
| 2008 | 559 | 575 | 643 | 531 | **577** |
| %chg | -3% | 1% | 14% | -4% | **2%** |
| 2009 | 473 | 458 | 469 | 478 | **470** |
| %chg | -15% | -20% | -27% | -10% | **-19%** |
| **Top Side, Aussie Beef, Frozen** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 624 | 583 | 634 | 686 | **632** |
| 2007 | 653 | 618 | 637 | 691 | **650** |
| %chg | 5% | 6% | 1% | 1% | **3%** |
| 2008 | 675 | 675 | 730 | 656 | **684** |
| %chg | 3% | 9% | 15% | -5% | **5%** |
| 2009 | 538 | 542 | 569 | 581 | **557** |
| %chg | -20% | -20% | -22% | -11% | **-18%** |
| **Trimming, Aussie Beef, Frozen** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 452 | 436 | 438 | 441 | **442** |
| 2007 | 445 | 452 | 450 | 448 | **449** |
| %chg | -1% | 4% | 3% | 2% | **2%** |
| 2008 | 446 | 517 | 608 | 464 | **509** |
| %chg | 0% | 14% | 35% | 3% | **13%** |
| 2009 | 385 | 396 | 391 | 376 | **387** |
| %chg | -14% | -23% | -36% | -19% | **-24%** |
| **Short Plate, US Beef, Frozen** | | | | | |
| Year/Month | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 0 | 0 | 0 | 0 | **0** |

| | | | | | |
|---|---|---|---|---|---|
| 2007 | 0 | 0 | 0 | 0 | **0** |
| %chg | - | - | - | - | - |
| 2008 | 0 | 739 | 799 | 827 | **788** |
| %chg | - | - | - | - | - |
| 2009 | 824 | 844 | 779 | 641 | **772** |
| %chg | - | 14% | -3% | -23% | **-2%** |
| Source: ALIC Monthly (Quarterly figures are compiled by post) | | | | | |

## V-a) Average Wholesale Price of Domestic Pork, Carcass by Meat Grade, CY 2006 - 2009

| | | | | | Unit: Yen per Kilogram |
|---|---|---|---|---|---|
| **Excellent Grade** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 442 | 501 | 513 | 444 | **475** |
| 2007 | 447 | 507 | 546 | 490 | **498** |
| % chg | 1% | 1% | 6% | 10% | **5%** |
| 2008 | 532 | 571 | 559 | 428 | **522** |
| % Chg | 19% | 13% | 2% | -13% | **5%** |
| 2009 | 409 | 471 | 414 | 417 | **428** |
| % Chg | -23% | -17% | -26% | -3% | **-18%** |
| **Medium Grade** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 412 | 476 | 488 | 417 | **448** |
| 2007 | 413 | 473 | 508 | 457 | **463** |
| % chg | 0% | -0% | 4% | 10% | **3%** |
| 2008 | 499 | 549 | 521 | 397 | **492** |
| % Chg | 21% | 16% | 3% | -13% | **6%** |
| 2009 | 380 | 444 | 380 | 377 | **395** |
| % Chg | -24% | -19% | -27% | -5% | **-20%** |
| Source: ALIC Monthly (Quarterly figures are compiled by post) | | | | | |

## V-b) Average Wholesale Price of Domestic Pork, Chilled Cuts, CY 2007 – 2009

| | | | | | Unit: Yen per Kilogram |
|---|---|---|---|---|---|
| **Full Set: Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 627 | 693 | 716 | 632 | 667 |
| 2007 | 630 | 700 | 771 | 692 | 698 |
| %chg | 0% | 1% | 8% | 10% | 5% |
| 2008 | 736 | 795 | 805 | 620 | 739 |
| %chg | 17% | 14% | 4% | -10% | 6% |
| 2009 | 599 | 651 | 608 | 584 | 610 |
| %chg | -19% | -18% | -25% | -6% | -17% |
| **Picnic: Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 484 | 528 | 533 | 474 | 505 |
| 2007 | 480 | 521 | 547 | 530 | 520 |
| %chg | -1% | -1% | 3% | 12% | 3% |
| 2008 | 564 | 630 | 630 | 495 | 580 |
| %chg | 17% | 21% | 15% | -7% | 12% |
| 2009 | 448 | 480 | 439 | 408 | 444 |
| %chg | -21% | -24% | -30% | -18% | -24% |
| **Shoulder Loin: Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 843 | 908 | 984 | 898 | 908 |
| 2007 | 867 | 921 | 1,032 | 955 | 944 |
| %chg | 3% | 1% | 5% | 6% | 4% |

| | | | | | |
|---|---|---|---|---|---|
| 2008 | 969 | 999 | 1,031 | 848 | 962 |
| %chg | 12% | 8% | -0% | -11% | 2% |
| 2009 | 785 | 822 | 779 | 796 | 795 |
| %chg | -19% | -18% | -24% | -6% | -17% |

**Loin: Chilled**

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | Yearly Ave. |
|---|---|---|---|---|---|
| 2006 | 920 | 992 | 1,079 | 983 | 994 |
| 2007 | 952 | 1,000 | 1,109 | 1,001 | 1,016 |
| %chg | 3% | 1% | 3% | 2% | 2% |
| 2008 | 1,018 | 1,042 | 1,073 | 872 | 1,001 |
| %chg | 7% | 4% | -3% | -13% | -1% |
| 2009 | 826 | 887 | 837 | 829 | 845 |
| %chg | -19% | -15% | -22% | -5% | -16% |

**Tender Loin: Chilled**

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | Yearly Ave. |
|---|---|---|---|---|---|
| 2006 | 1,017 | 1,137 | 1,172 | 1,045 | 1,093 |
| 2007 | 1,030 | 1,155 | 1,251 | 1,115 | 1,138 |
| %chg | 1% | 2% | 7% | 7% | 4% |
| 2008 | 1,148 | 1,194 | 1,215 | 986 | 1,136 |
| %chg | 11% | 3% | -3% | -12% | -0% |
| 2009 | 968 | 1,032 | 971 | 931 | 975 |
| %chg | -16% | -14% | -20% | -6% | -14% |

**Belly: Chilled**

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | Yearly Ave. |
|---|---|---|---|---|---|
| 2006 | 795 | 834 | 855 | 840 | 831 |
| 2007 | 832 | 863 | 889 | 894 | 870 |
| %chg | 5% | 4% | 4% | 6% | 5% |
| 2008 | 924 | 932 | 930 | 780 | 891 |
| %chg | 11% | 8% | 5% | -13% | 3% |
| 2009 | 743 | 752 | 694 | 741 | 733 |
| %chg | -20% | -19% | -25% | -5% | -18% |

**Ham: Chilled**

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | Yearly Ave. |
|---|---|---|---|---|---|
| 2006 | 505 | 558 | 567 | 499 | 532 |
| 2007 | 504 | 554 | 592 | 564 | 553 |
| %chg | -0% | -1% | 4% | 13% | 4% |
| 2008 | 594 | 657 | 652 | 518 | 605 |
| %chg | 18% | 19% | 10% | -8% | 9% |
| 2009 | 478 | 519 | 474 | 437 | 477 |
| %chg | -20% | -21% | -27% | -16% | -21% |

Source: ALIC Monthly (Quarterly figures are compiled by post)

## V-c) Average Wholesale Price of Domestic Pork, Frozen Cuts, CY 2006 – 2009

Unit: Yen per Kilogram

**Picnic: Frozen**

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | Yearly Ave. |
|---|---|---|---|---|---|
| 2006 | 466 | 466 | 466 | 456 | 464 |
| 2007 | 459 | 468 | 476 | 495 | 474 |
| %chg | -1% | 0% | 2% | 9% | 2% |
| 2008 | 528 | 577 | 589 | 502 | 549 |
| %chg | 15% | 23% | 24% | 1% | 16% |
| 2009 | 445 | 431 | 398 | 383 | 414 |
| %chg | -16% | -25% | -32% | -24% | -25% |

**Shoulder Loin: Frozen**

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | Yearly Ave. |
|---|---|---|---|---|---|
| 2006 | 712 | 724 | 744 | 786 | 742 |
| 2007 | 785 | 785 | 797 | 795 | 791 |

| | | | | | |
|---|---|---|---|---|---|
| %chg | 10% | 8% | 7% | 1% | 7% |
| 2008 | 818 | 835 | 837 | 765 | 814 |
| %chg | 4% | 6% | 5% | -4% | 3% |
| 2009 | 718 | 695 | 647 | 641 | 675 |
| %chg | -12% | -17% | -23% | -16% | -17% |
| **Loin: Frozen** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 764 | 772 | 815 | 835 | 796 |
| 2007 | 843 | 844 | 844 | 832 | 841 |
| %chg | 10% | 9% | 4% | -0% | 6% |
| 2008 | 838 | 848 | 856 | 791 | 833 |
| %chg | -1% | 0% | 1% | -5% | -1% |
| 2009 | 734 | 719 | 680 | 697 | 708 |
| %chg | -12% | -15% | -21% | -12% | -15% |
| **Tender Loin: Frozen** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 821 | 841 | 858 | 861 | 845 |
| 2007 | 873 | 887 | 911 | 916 | 897 |
| %chg | 6% | 5% | 6% | 6% | 6% |
| 2008 | 902 | 925 | 942 | 898 | 917 |
| %chg | 3% | 4% | 3% | -2% | 2% |
| 2009 | 846 | 825 | 777 | 765 | 803 |
| %chg | -6% | -11% | -18% | -15% | -12% |
| **Belly: Frozen** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 684 | 697 | 707 | 745 | 708 |
| 2007 | 750 | 761 | 763 | 776 | 762 |
| %chg | 10% | 9% | 8% | 4% | 8% |
| 2008 | 808 | 833 | 828 | 726 | 799 |
| %chg | 8% | 9% | 9% | -6% | 5% |
| 2009 | 681 | 655 | 589 | 606 | 633 |
| %chg | -16% | -21% | -29% | -17% | -21% |
| **Ham: Frozen** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 474 | 482 | 483 | 472 | 478 |
| 2007 | 477 | 487 | 516 | 524 | 501 |
| %chg | 1% | 1% | 7% | 11% | 5% |
| 2008 | 556 | 606 | 615 | 526 | 576 |
| %chg | 16% | 24% | 19% | 0% | 15% |
| 2009 | 464 | 449 | 418 | 406 | 435 |
| %chg | -16% | -26% | -32% | -23% | -25% |
| Source: ALIC Monthly (Quarterly figures are compiled by post) | | | | | |

## V-e) Average Wholesale Price of Imported Pork, Chilled Cuts, CY 2006 – 2009

| | | | | | |
|---|---|---|---|---|---|
| | | | | | Unit: Yen per Kilogram |
| **Loin, US: Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 636 | 635 | 658 | 629 | 640 |
| 2007 | 635 | 637 | 637 | 632 | 635 |
| %chg | -0% | 0% | -3% | 1% | -1% |
| 2008 | 626 | 622 | 643 | 625 | 629 |
| %chg | -1% | -2% | 1% | -1% | -1% |
| 2009 | 621 | 605 | 610 | 607 | 611 |
| %chg | -1% | -3% | -5% | -3% | -3% |
| **Loin, Canada: Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |

| | | | | | |
|---|---|---|---|---|---|
| 2006 | 661 | 657 | 684 | 658 | 665 |
| 2007 | 671 | 677 | 682 | 674 | 676 |
| %chg | 2% | 3% | -0% | 2% | 2% |
| 2008 | 656 | 650 | 671 | 650 | 657 |
| %chg | -2% | -4% | -2% | -4% | -3% |
| 2009 | 635 | 631 | 634 | 630 | 633 |
| %chg | -3% | -3% | -6% | -3% | -4% |
| **Tender Loin, US: Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 826 | 834 | 873 | 826 | 840 |
| 2007 | 833 | 856 | 849 | 783 | 830 |
| %chg | 1% | 3% | -3% | -5% | -1% |
| 2008 | 745 | 751 | 852 | 763 | 778 |
| %chg | -11% | -12% | 0% | -3% | -6% |
| 2009 | 736 | 724 | 711 | 698 | 717 |
| %chg | -1% | -4% | -17% | -9% | -8% |
| **Tender Loin, Canada: Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 879 | 879 | 902 | 891 | 888 |
| 2007 | 892 | 895 | 902 | 863 | 888 |
| %chg | 2% | 2% | 0% | -3% | 0% |
| 2008 | 846 | 845 | 884 | 841 | 854 |
| %chg | -5% | -6% | -2% | -3% | -4% |
| 2009 | 796 | 787 | 769 | 776 | 782 |
| %chg | -6% | -7% | -13% | -8% | -8% |
| **Shoulder Loin, US: Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 673 | 661 | 706 | 664 | 676 |
| 2007 | 669 | 682 | 667 | 658 | 669 |
| %chg | -0% | 3% | -5% | -1% | -1% |
| 2008 | 652 | 648 | 661 | 643 | 651 |
| %chg | -3% | -5% | -1% | -2% | -3% |
| 2009 | 631 | 617 | 624 | 625 | 624 |
| %chg | -3% | -5% | -6% | -3% | -4% |
| **shoulder Loin, Canada: Chilled** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 684 | 674 | 714 | 690 | 690 |
| 2007 | 702 | 717 | 714 | 696 | 707 |
| %chg | 3% | 6% | 0% | 1% | 2% |
| 2008 | 683 | 676 | 698 | 673 | 682 |
| %chg | -3% | -6% | -2% | -3% | -4% |
| 2009 | 648 | 649 | 647 | 645 | 647 |
| %chg | -5% | -4% | -7% | -4% | -5% |
| Source: ALIC Monthly (Quarterly figures are compiled by post) | | | | | |

## V-d) Average Wholesale Price of Imported Pork, Frozen Cuts, CY 2006 – 2009

| | | | | | |
|---|---|---|---|---|---|
| | | | | | Unit: Yen per Kilogram |
| **Loin, Canada: Frozen** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 535 | 531 | 549 | 596 | 553 |
| 2007 | 602 | 587 | 586 | 583 | 589 |
| %chg | 13% | 11% | 7% | -2% | 7% |
| 2008 | 592 | 595 | 612 | 621 | 605 |
| %chg | -2% | 1% | 4% | 6% | 3% |
| 2009 | 587 | 576 | 510 | 478 | 538 |
| %chg | -1% | -3% | -17% | -23% | -11% |
| **Loin, Denmark: Frozen** | | | | | |
| | **1st Qtr.** | **2nd Qtr.** | **3rd Qtr.** | **4th Qtr.** | **Yearly Ave.** |
| 2006 | 611 | 614 | 649 | 682 | 639 |

| | | | | | |
|---|---|---|---|---|---|
| 2007 | 664 | 658 | 638 | 642 | 651 |
| %chg | 9% | 7% | -2% | -6% | 2% |
| 2008 | 629 | 634 | 649 | 662 | 644 |
| %chg | -5% | -4% | 2% | 3% | -1% |
| 2009 | 653 | 647 | 640 | 632 | 643 |
| %chg | 4% | 2% | -1% | -4% | -0% |

**Tender Loin, US: Frozen**

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | Yearly Ave. |
|---|---|---|---|---|---|
| 2006 | 711 | 706 | 723 | 753 | 723 |
| 2007 | 731 | 716 | 707 | 690 | 711 |
| %chg | 3% | 1% | -2% | -8% | -2% |
| 2008 | 690 | 673 | 672 | 678 | 678 |
| %chg | -6% | -6% | -5% | -2% | -5% |
| 2009 | 660 | 659 | 653 | 643 | 654 |
| %chg | -4% | -2% | -3% | -5% | -4% |

**Tender Loin, Canada: Frozen**

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | Yearly Ave. |
|---|---|---|---|---|---|
| 2006 | 747 | 736 | 758 | 785 | 757 |
| 2007 | 772 | 761 | 738 | 742 | 753 |
| %chg | 3% | 3% | -3% | -5% | -0% |
| 2008 | 724 | 722 | 706 | 725 | 719 |
| %chg | -6% | -5% | -4% | -2% | -5% |
| 2009 | 708 | 702 | 680 | 677 | 692 |
| %chg | -2% | -3% | -4% | -7% | -4% |

**Tender Loin, Denmark: Frozen**

| | 1st Qtr. | 2nd Qtr. | 3rd Qtr. | 4th Qtr. | Yearly Ave. |
|---|---|---|---|---|---|
| 2006 | 728 | 725 | 733 | 779 | 741 |
| 2007 | 766 | 766 | 754 | 731 | 754 |
| %chg | 5% | 6% | 3% | -6% | 2% |
| 2008 | 696 | 691 | 687 | 692 | 692 |
| %chg | -9% | -10% | -9% | -5% | -8% |
| 2009 | 753 | 744 | 721 | 701 | 730 |
| %chg | 8% | 8% | 5% | 1% | 6% |

Source: ALIC Monthly (Quarterly figures are compiled by post)

## VI-6 Japanese Year Beginning Cattle Inventory (As of February 1)

Unit: 1,000 farms

| | 2006 | 2007 | 2008 | %chg | 2009 | %chg |
|---|---|---|---|---|---|---|
| **Number of Beef Cattle Farms** | **85.6** | **82.3** | **80.4** | **-2%** | **77.3** | **-4%** |
| **Number of Dairy Cattle Farms (Female)** | **26.6** | **25.4** | **24.4** | **-4%** | **23.1** | **-5%** |
| | | | | | | Unit: 1,000 heads |
| Beef Cattle (Wagyu and Other) | 1,703 | 1,742 | 1,823 | 5% | 1,889 | 4% |
| Dairy Cattle for Beef | 468 | 460 | 431 | -6% | 411 | -5% |
| F-1 Cross Bred Cattle | 584 | 604 | 636 | 5% | 622 | -2% |
| 'Sub Total Dairy & F-1 Cattle for Beef | 1,052 | 1,064 | 1,067 | 0% | 1,033 | -3% |
| **Total # of Beef Cattle Raised** | **2,755** | **2,806** | **2,890** | **3%** | **2,922** | **1%** |
| **Total # of Dairy Female Raised** | **1,636** | **1,592** | **1,533** | **-4%** | **1,500** | **-2%** |
| **Total # of Cattle. Beef and Dairy Combined** | **4,391** | **4,398** | **4,423** | **-1%** | **4,422** | **-1%** |

Source: MAFF Livestock Statistics