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Report Highlights:

FAS/Tokyo forecasts a drop in 2024 cattle inventory on greater slaughtering of dairy cows, slower calf production, and no live cattle imports in 2023 and 2024. Beef production in 2024 will be down as well. Inflation is hitting retail sales of beef although consumption in the food service sector by increasing foreign visitors will help power through the dampening effect of inflation. FAS/Tokyo projects Japan's high carcass prices and strong domestic retail demand will drive greater pork production. For certain prepared pork products, recently lowering of tariffs under Japan's major economic partnership agreements further incentivizes imports.

Cattle and Beef

Table 1: Cattle Production, Supply and Distribution

Animal Numbers, Cattle Market Year Begins Japan	2022		2023		2024	
	Jan 2022		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stocks (1000 HEAD)	3990	3990	3967	3967	0	3920
Dairy Cows Beg. Stocks (1000 HEAD)	862	862	860	837	0	830
Beef Cows Beg. Stocks (1000 HEAD)	575	575	575	578	0	575
Production (Calf Crop) (1000 HEAD)	1255	1255	1250	1230	0	1225
Total Imports (1000 HEAD)	8	8	5	0	0	0
Total Supply (1000 HEAD)	5253	5253	5222	5197	0	5145
Total Exports (1000 HEAD)	0	0	0	0	0	0
Cow Slaughter (1000 HEAD)	270	270	285	285	0	265
Calf Slaughter (1000 HEAD)	5	5	5	5	0	5
Other Slaughter (1000 HEAD)	813	813	835	835	0	835
Total Slaughter (1000 HEAD)	1088	1088	1125	1125	0	1105
Loss and Residual (1000 HEAD)	198	198	175	152	0	125
Ending Inventories (1000 HEAD)	3967	3967	3922	3920	0	3915
Total Distribution (1000 HEAD)	5253	5253	5222	5197	0	5145
(1000 HEAD)						

Table 2: Beef Production, Supply and Distribution

Meat, Beef and Veal Market Year Begins Japan	2022		2023		2024	
	Jan 2022		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference) (1000 HEAD)	1088	1088	1125	1125	0	1105
Beginning Stocks (1000 MT CWE)	182	182	212	212	0	209
Production (1000 MT CWE)	492	492	510	510	0	505
Total Imports (1000 MT CWE)	777	777	800	775	0	775
Total Supply (1000 MT CWE)	1451	1451	1522	1497	0	1489
Total Exports (1000 MT CWE)	11	11	13	13	0	15
Human Dom. Consumption (1000 MT CWE)	1228	1228	1294	1275	0	1275
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	1228	1228	1294	1275	0	1275
Ending Stocks (1000 MT CWE)	212	212	215	209	0	199
Total Distribution (1000 MT CWE)	1451	1451	1522	1497	0	1489
(1000 HEAD), (1000 MT carcass weight equivalence [CWE])						

Production

FAS/Tokyo Projects that 2024 cattle beginning stocks will dip to 3.920 million head (Table 1) on increased dairy cow slaughter and no imports of live cattle in 2023. Dairy farmers slaughtered more cows in 2022 and 2023 to deal with excess milk production (For details, please read our [Livestock Semiannual report](#)). Accordingly, beginning stocks of dairy cows are down for 2024. Japan will import nearly zero live cattle in 2023 and 2024, owing to trade difficulties such as a weak yen and high

transportation costs, plus sluggish demand resulting from a narrowing price gap between domestic and imported beef calves. Beginning stocks of beef breeding cows in 2024 will be down as struggling small-scale breeding farm operators exit the business, and total calf production in 2024 will decline accordingly. FAS/Tokyo assumes that the slaughtering of cows to reduce excess milk production will end in early 2024 after balance is restored to milk supply and demand. Thereafter the pace of dairy cow slaughter will moderate to normal levels. In turn, 2024 total slaughter and total beef production will drop year on year.

According to the latest statistics published by Ministry of Agriculture, Forestry and Fisheries (MAFF), as of February 1, 2023, the number of beef operators in Japan dropped by 5 percent from 2022, although the total beef cattle herd size grew by 3 percent (Table 3). Severe market conditions for cattle operations, namely, high costs and low market prices, drove many farmers rearing less than 200 heads of cattle to exit the market.

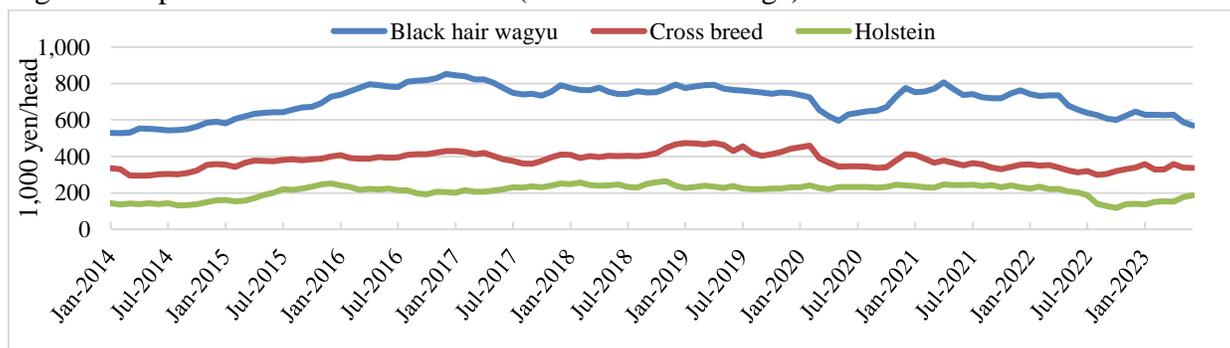
Table 3: Number of Beef Operators and Beef Cattle in Japan

	Year (as of February 1)	Number of Cattle on Farm (Unit: head)				Total
		0 - 19	20 - 99	100 - 199	200 and more	
Number of farms (Unit: operation)	2022	24,260	11,680	2,220	2,213	40,373
	2023	22,610	11,510	2,180	2,232	38,532
	<i>Change</i>	-7%	-1%	-2%	1%	-5%
Cattle population (Unit: head)	2022	185,800	535,400	320,000	1,572,700	2,613,900
	2023	179,300	544,700	323,900	1,638,300	2,686,200
	<i>Change</i>	-3%	2%	1%	4%	3%

Source: MAFF

Weak *carcass* market prices have depressed beef *calf* market prices, which in turn has pushed cow-calf operators to limit production or exit the business completely (Figure 1). Beef *calf* prices have been unstable in recent years after beef *carcass* prices crashed in May 2020 under demand shocks induced by the COVID-19 outbreak. After recovering to pre-COVID-19 levels, in May 2022 calf prices again dropped under the weight of boosts in supply as many dairy farmers responded to a milk surplus by using more Holstein cows to carry embryos of wagyu calves or to be impregnated with wagyu semen by artificial insemination.

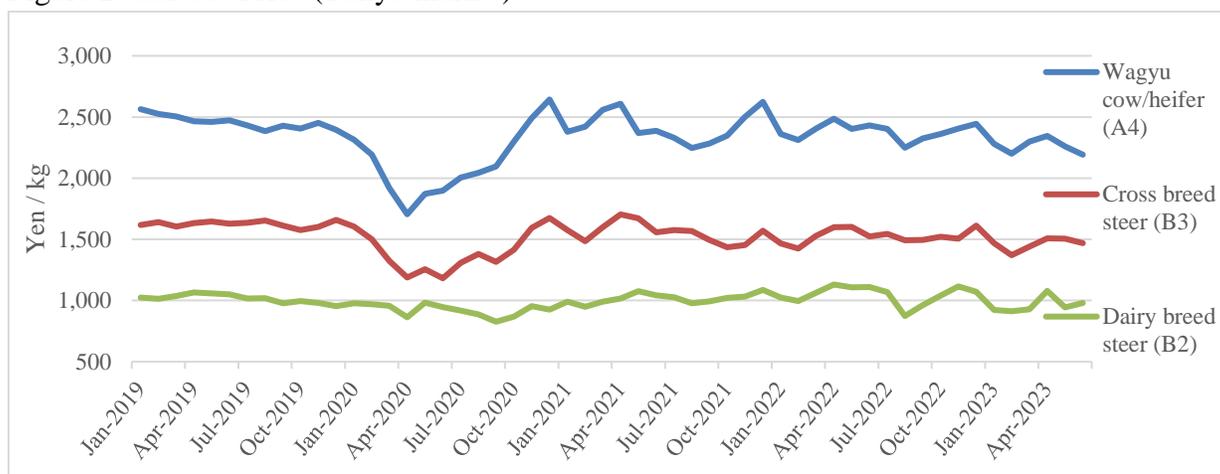
Figure 1: Japan Beef Calf Market Price (male/female average)



Source: ALIC

Although by 2021 wagyu carcass prices had recovered to pre-COVID 19 levels (Figure 2), they have dropped steadily since then, declining by an additional six percent in 2023. As a result, fattening operators are reluctant to replenish herds amid a weak market for carcasses. Most beef cow-calf operators in Japan are small scale: 60 percent are rearing less than 10 breeding cows. Given that current market dynamics produce a net loss on each calf raised, MAFF has launched the Emergency Support Program for Wagyu Calf Producers. The Agricultural and Livestock Industries Corporation (ALIC) operates the program which runs from January 1, 2023 until March 31, 2024 (For details, see [ALIC website](#), Japanese language only). Under the terms of the program, when market prices sag below MAFF’s declared minimum prices, an eligible producer may receive three-fourths of the price gap between average calf market prices for each breed and MAFF’s minimum price (600,000 yen, or \$4,138 @ \$1 = 145 yen, per head for black hair wagyu; 550,000 yen [\$3,798] for brown hair wagyu; and 350,000 yen [\$2,414] for other wagyu breeds). For black hair wagyu, the quarterly calculation represents an average of carcass prices in four designated regions; for brown hair wagyu and other wagyu breeds, national average prices are used. In the first quarter (Q1) of Japanese fiscal year 2023 (JFY, April 1 – March 31), program payments made for black hair wagyu calves in two different areas were 26,000 (\$179) and 15,000 yen (\$103) per head; for brown hair wagyu calves, 11,200 yen (\$72.) per head.

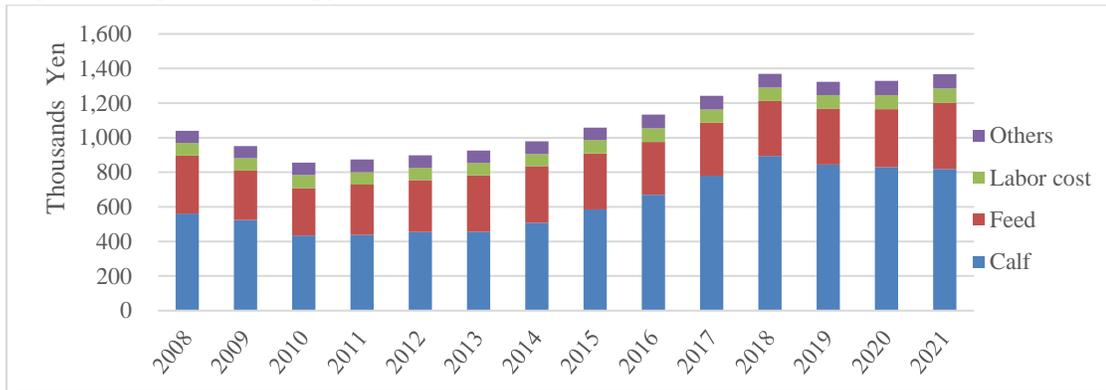
Figure 2: Carcass Price (Tokyo market)



Source: ALIC

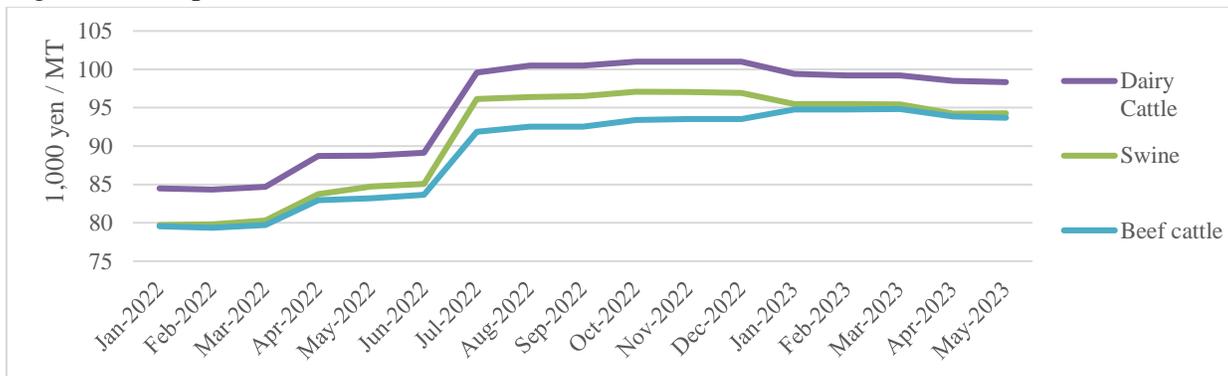
Feed is 30% of total production costs for fattening operators (Figure 3). Soaring feed costs of course squeeze profit margins of farmers, who often are unable to pass higher costs onto buyers. To support cattle farmers, MAFF continues to implement its Compound Feed Stabilization System. MAFF recently amended the system to extend the support to farmers when higher costs become normalized (For details, see [JA2023-0069](#)). For example, an eligible operator could receive 7,050 yen (\$49) per metric ton (MT) in Q1, JFY2023. The average compound feed price for beef cattle from April to May in 2023 was 93,790 yen (\$647) per MT, up 15 % from 2022 (Figure 4).

Figure 3: Japan Fed Wagyu Steer Production Cost (2008 – 2021)



Source: MAFF

Figure 4: Compound Feed Retail Price



Source: MAFF

Cattle fattening farms favor raising black hair wagyu for their higher carcass prices (Figure 2). As of February 1, 2023, 68 percent of beef cattle in Japan are black hair wagyu. Slaughter numbers in 2024 are expected to be higher (Table 4); the total in the first six months of 2023 was also up (Table 5). By contrast, in 2024 fewer Holstein steers and bulls will be slaughtered since they draw lower market prices.

Japan’s total slaughter from January through June in 2023 was up three percent; FAS/Tokyo projects that the full year’s total will be 1.125 million and beef production will expand about four percent from 2022. FAS/Tokyo still expects dairy cows to be slaughtered to reduce surplus milk capacity, but at a slower pace by year end.

Table 4: Beef Cattle within Age Range for Slaughtering in 2024

	Black Hair Wagyu	Holstein (steer/bull)	Cross breed
Targeted Slaughter Age	27 months	17 months	24 months
Cattle Age (As of May 31)	8 - 19 months	0 - 9 months	5 - 16 months
2022	509,448	115,105	257,464
2023	518,813	95,421	251,753
% change	1.8%	-17.1%	-2.2%

Source: FAS/Tokyo based on data from the National Livestock Breeding Center

Table 5: Slaughter in 2023 (sorted by breed)

Slaughtered number (head)	Wagyu		Dairy		Cross		Other	Calf	Total
	steer/bull	heifer/cow	steer/bull	heifer/cow	steer/bull	heifer/cow			
Jan	19,249	16,797	10,431	16,341	10,663	9,379	923	493	84,276
Feb	19,359	16,710	10,744	15,385	10,496	9,102	1,040	508	83,344
Mar	21,781	18,765	11,193	17,940	11,615	10,252	1,209	604	93,359
Apr	23,614	19,677	11,221	14,140	12,013	11,644	914	518	93,741
May	20,463	17,795	11,095	13,992	10,782	9,710	860	512	85,209
Jun	21,624	19,000	11,214	14,513	11,109	10,049	913	526	88,948
Total	126,090	108,744	65,898	92,311	66,678	60,136	5,859	3,161	528,877
Year on Year (Jan - Jun)	2%	4%	-8%	4%	8%	8%	-13%	32%	3%

Source: MAFF

Consumption

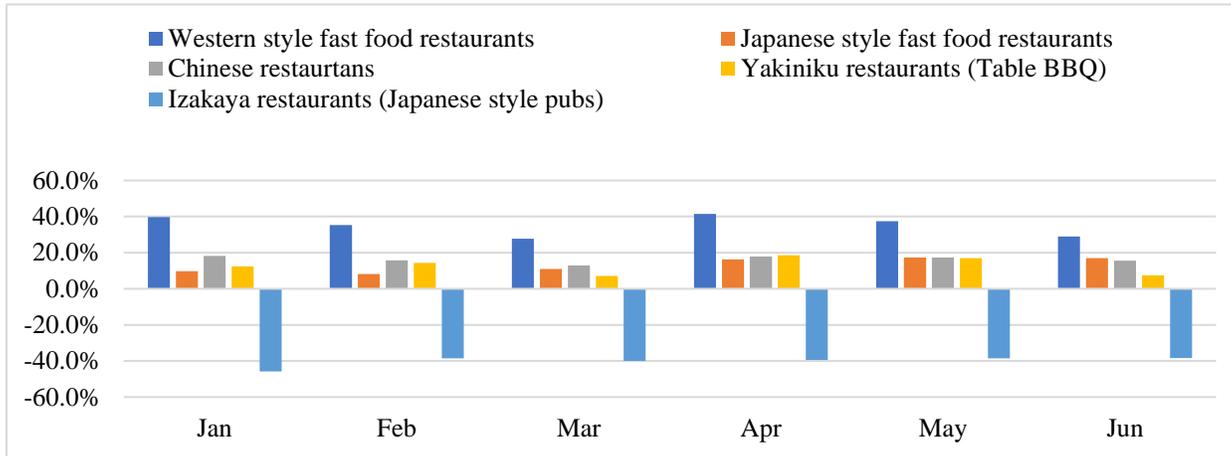
FAS/Tokyo projects that Japan's beef consumption will be flat in 2024 year on year. Retail demand is dimmed by ongoing inflation, which will at least partly offset a spike in demand fueled by tourism and foreign visitors.

On May 8, the government of Japan (GoJ) reclassified COVID-19's category to Class 5 under the Act on the Prevention of Infectious Diseases and Medical Care for Patients with Infectious Diseases (For details, visit [the Ministry of Health, Labour and Welfare](#) (MHLW) web page). For diseases categorized in Class 5, GoJ does not require individuals to take any restrictive protection or control measures in daily living.

After nearly three years of restricted movement and limited dining options, social gatherings, dining out, and travel are again widespread throughout Japan. Sales in the hotel, restaurant, and institutional (HRI) sectors, some 60 percent of total beef consumption, now surpass pre-COVID-19 levels in most types of restaurants (Figure 5). Burger chain restaurants, categorized as Western style fast food restaurants, had steady sales through the COVID-19 pandemic and continue to do so. Beef bowl chain restaurants, which are Japanese style fast food restaurants, had fewer customers during COVID-19 pandemic since many

office workers were working from home. This year they have largely recovered their customer base. And *Yakiniku* restaurants, which feature at-table meat grills, are now popular among families.

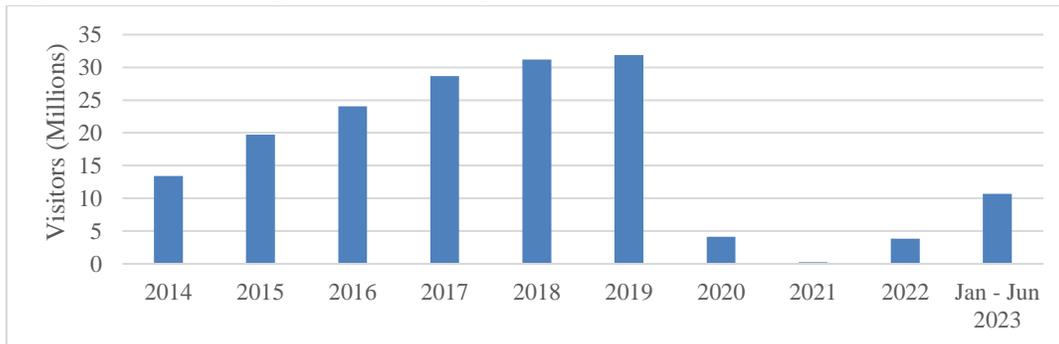
Figure 5: Japan’s Food Service Sales (2023 vs. 2019)



Source: Japan Food Service Association

More foreign visitors have fueled demand in the HRI sector, too. The May 8th reclassification of COVID-19 to Class 5 removed all social restrictions that were used to control spread of the disease. Prior to that, all COVID-19 related border controls had been lifted as of April 29 ([MHLW](#) web page). The number of overseas visitors to Japan surged and in the first 6-months of 2023 reached 34 % of the total visitors in 2019 (Figure 6).

Figure 6: Total Foreign Visitors to Japan (2014 – June 2023)



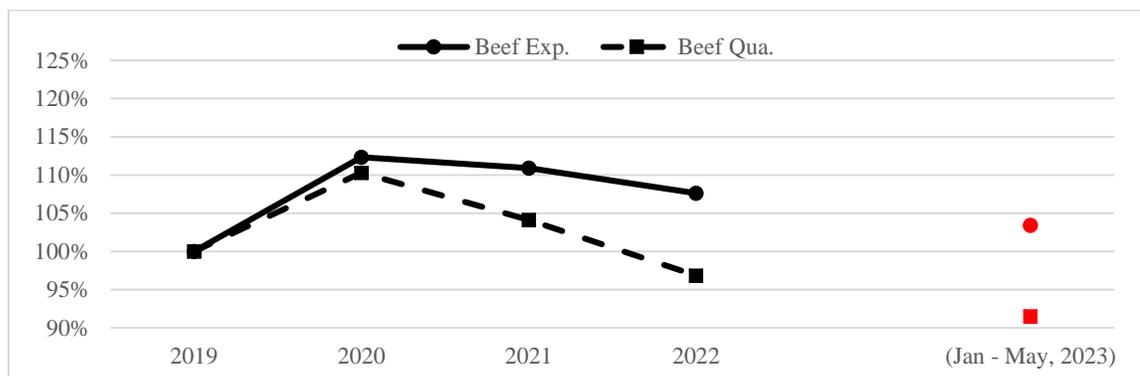
Source: Japan Tourism Statistics

Nevertheless, inflation is forcing households and consumers to be more price-conscious in selecting products and services. Retail demand for beef is relatively price elastic and consumers have shifted some demand to less expensive products such as pork or chicken.

According to a household survey published by Ministry of Internal Affairs and Communications (MIAC), compared to 2019, in 2022 consumers purchased three percent less beef but paid eight percent more for it (Figure 7). And in the first five months of 2023, consumers purchased nine percent less beef, but paid three percent more for it than in 2019.

FAS/Tokyo assumes that tourism will continue to stimulate beef consumption in the HRI sector in the second half of 2023 through 2024, but inflation will slow growth, so overall total beef consumption in 2024 will be flat year on year.

Figure 7: Japan’s Beef Retail Sales Trends (vs. 2019): Consumer Expenditure and Quantity



Source: MIAC

Trade

FAS/Tokyo projects that 2024 beef imports will be flat year on year. High import prices and a weak yen exchange rate soften demand. Chilled beef imports for premium retail sales will be limited, although frozen beef imports will rise to supply the boost in demand in the HRI segment.

Japan’s overall beef imports in the first 6 months of year 2023 were down one percent from 2022 (Table 6): chilled beef imports are down 11 percent; frozen imports are up five percent.

Table 6: Japan Beef Imports January – June (2022-2023)

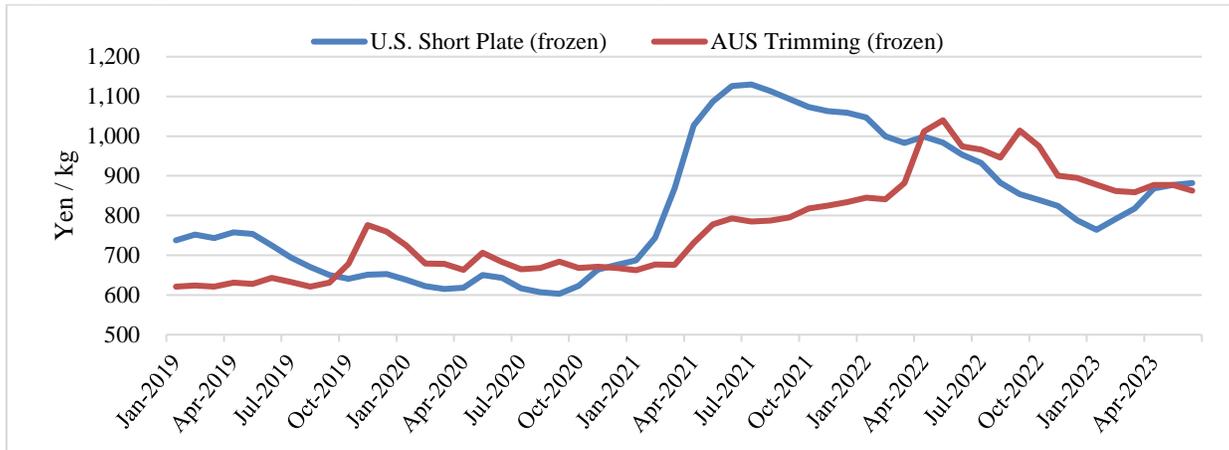
	January - June		
	2022	2023	Change
Total	382,499	378,677	-1%
Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)	217,094	209,461	-4%
<i>Australia</i>	<i>144,453</i>	<i>144,649</i>	<i>0%</i>
<i>Canada</i>	<i>29,989</i>	<i>35,468</i>	<i>18%</i>
<i>New Zealand</i>	<i>21,317</i>	<i>16,709</i>	<i>-22%</i>
<i>Mexico</i>	<i>21,335</i>	<i>12,634</i>	<i>-41%</i>
United States	149,753	161,904	8%
European Union (EU)	8,066	3,176	-61%
Other	7,586	4,136	-45%

Source: Trade Data Monitor (TDM)

Imported frozen beef supplies food processing companies as well as the HRI sector. But there inflation also is affecting demand: industry sources say some restaurant chains are changing menus and

substituting cheaper cuts of beef or changing to pork. US beef exports are affected directly: growth in supply of Australian trimmings tracks closely with the spike in prices of US short plates (Figure 8). Some Japanese importers expect U.S. short plate prices must rise further since cattle prices are high and slaughters are limited. By contrast, prices of Australian trimmings likely will continue to fall since demand from China is flat.

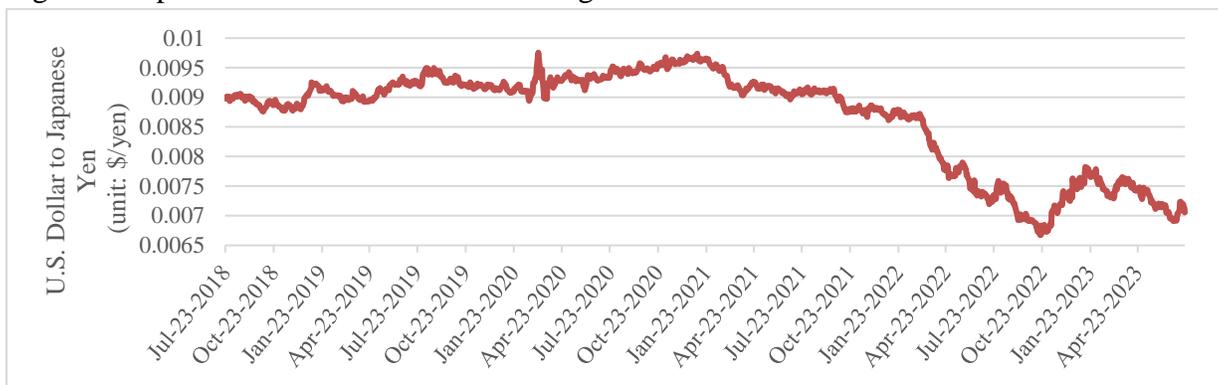
Figure 8: Japan Price of Imported Beef (wholesale price)



Source: ALIC

A weak yen has also depressed demand for meat imports. Figure 9 below shows the yen started weakening in early 2022. For Japan’s beef exports, the weak yen could give a boost in 2024 with help from Japan’s incentive policies and expanded wagyu production.

Figure 9: Japanese Yen / U.S. Dollar Exchange Rate



Source: Board of Governors of the Federal Reserve System

Swine and Pork

Table 7: Swine Production, Supply and Distribution

Animal Numbers, Swine Market Year Begins Japan	2022		2023		2024	
	Jan 2022		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Beginning Stocks (1000 HEAD)	8949	8949	8918	8956	0	8970
Sow Beginning Stocks (1000 HEAD)	789	789	795	792	0	795
Production (Pig Crop) (1000 HEAD)	16795	16795	16900	16800	0	16850
Total Imports (1000 HEAD)	1	1	1	1	0	1
Total Supply (1000 HEAD)	25745	25745	25819	25757	0	25821
Total Exports (1000 HEAD)	0	0	0	0	0	0
Sow Slaughter (1000 HEAD)	0	0	0	0	0	0
Other Slaughter (1000 HEAD)	16577	16577	16500	16550	0	16620
Total Slaughter (1000 HEAD)	16577	16577	16500	16550	0	16620
Loss and Residual (1000 HEAD)	250	212	240	237	0	206
Ending Inventories (1000 HEAD)	8918	8956	9079	8970	0	8995
Total Distribution (1000 HEAD)	25745	25745	25819	25757	0	25821
(1000 HEAD)						

Table 8: Pork Production, Supply and Distribution

Meat, Swine Market Year Begins Japan	2022		2023		2024	
	Jan 2022		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference) (1000 HEAD)	16577	16577	16500	16550	0	16620
Beginning Stocks (1000 MT CWE)	219	219	267	267	0	290
Production (1000 MT CWE)	1293	1293	1295	1295	0	1300
Total Imports (1000 MT CWE)	1523	1523	1470	1510	0	1510
Total Supply (1000 MT CWE)	3035	3035	3032	3072	0	3100
Total Exports (1000 MT CWE)	3	3	3	2	0	2
Human Dom. Consumption (1000 MT CWE)	2765	2765	2780	2780	0	2790
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	2765	2765	2780	2780	0	2790
Ending Stocks (1000 MT CWE)	267	267	249	290	0	308
Total Distribution (1000 MT CWE)	3035	3035	3032	3072	0	3100
(1000 HEAD) ,(1000 MT CWE)						

Production

FAS/Tokyo projects higher beginning inventory of swine in Japan in 2024. Although production costs are still high, strong carcass prices and steady domestic demand should sustain operators' production levels. Slaughters in 2024 will be up, but pig production will more than keep pace, so ending inventory in 2024 will be up year on year.

According to the latest statistics published by MAFF, as of February 1, 2023, Japan's swine population expanded slightly, by 0.4%, from 2022, even though the total number of hog operators shrank by 6 % as

many smaller to medium size hog farm operators exited the market or merged with larger operators (Supplemental Table 5). Demographics are a factor: existing farmers are reaching retirement age but attracting successors to take over farms remains a challenge (Table 9).

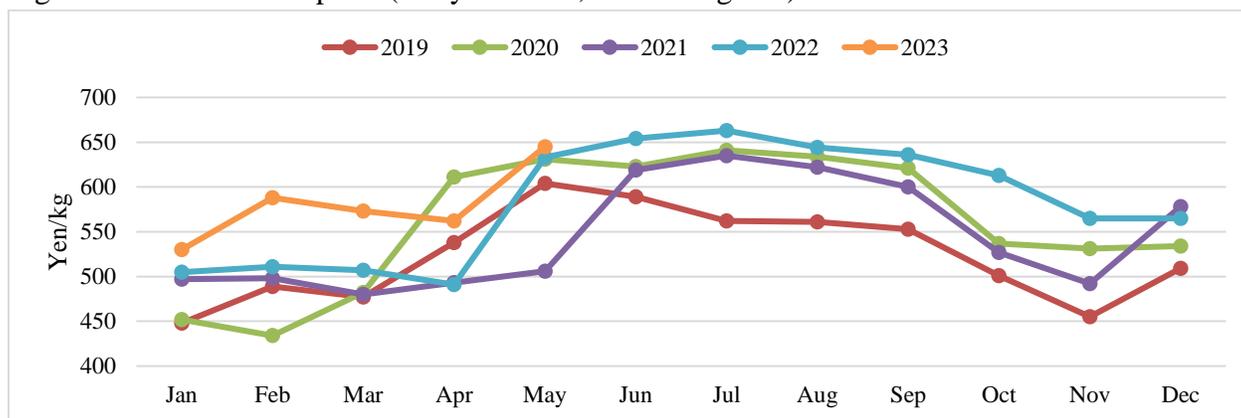
Table 9: Japan's Number of Integrated Hog Operations sorted by Sow Population unit: operation

Year	Sow Population (Head)					
	1 - 9	10 - 29	30 - 49	50 - 99	100 - 199	200 or more
2022	170	224	228	488	585	923
2023	141	192	219	453	531	974
Change	-17%	-14%	-4%	-7%	-9%	6%

Source: MAFF

Inflating production costs also remain a problem. Feed costs at hog operations were about 65% of total production costs per head in 2020, but in the three-year period ending in May 2023 average feed costs were up by 51%. Support payments by MAFF offset some of the higher costs (for details, read beef section in this report). It also helps that carcass prices are at historically high levels (Figure 10). Meat industries expect strong domestic retail demand for pork will continue to support carcass prices.

Figure 10: Pork carcass price (Tokyo market, excellent grade)



Source: ALIC

In the first half of 2023, hogs were finished to heavier weights which reduced total slaughters by 2% (Table 10). In the Japan market, heavier carcasses can command a premium price per kilo, which offsets the cost of the additional feed required. High carcass prices resulted in the 6-month average carcass weight rising to 79.5 kg.

Table 10: Japan Swine Slaughter and Pork Production (2022 – 2023)

January - Jun	Slaughter (head)	Production (CWE, MT)	Average carcass weight (kg)
2022	8,309,954	654,667	78.8
2023	8,184,734	650,282	79.5
% Change	-2%	-1%	1%

Source: MAFF

In 2023, impact of Classical Swine Fever (CSF) was minor: only two cases were reported, with just 2,950 heads culled. FAS/Tokyo assumes minimal impact of CSF again this year.

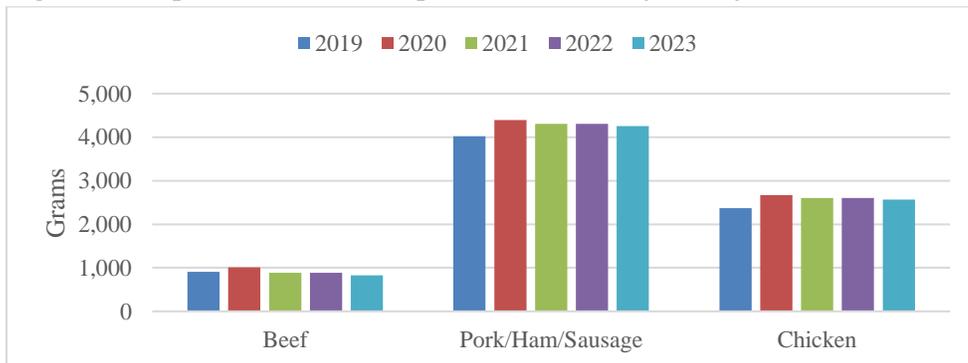
Consumption

FAS/Tokyo projects that pork will continue to be a main protein source for consumers in Japan in 2024. As explained in the beef consumption section, consumers are selecting pork and pork products as less-expensive alternative animal protein sources. FAS/Tokyo assumes demand for pork will remain strong as this trend continues in the second half year of 2023 through 2024.

Retail sales of pork and pork products from January until June in 2023 exceeded pre-COVID-19 levels (Figure 11). The majority of Japan’s total pork consumption is retail, and prices have risen along with beef. But pork demand has been less elastic than beef demand: Compared to 2019, pork consumption in 2022 and through the first 5 months of 2023 increased 7% in quantity, even though retail prices were higher by 12% in 2022 and 16% in 2023 (Figure 12).

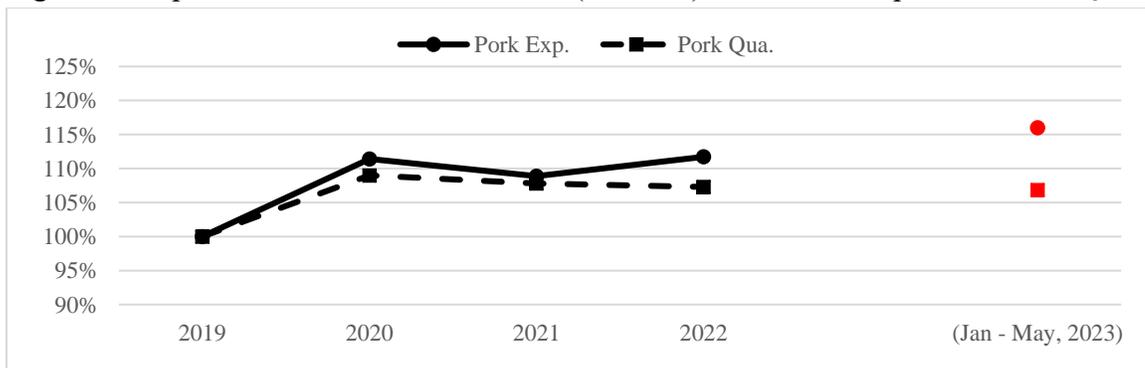
After the lifting of COVID-19 related restrictions, increased opportunities to eat in restaurants or with office colleagues drove HRI pork consumption back up to pre-COVID-19 levels. A rise in quick service food options that included pork further drove the recovery.

Figure 11: Japan Retail Consumption from January – May (2019 - 2023)



Source: MIAC

Figure 12: Japan’s Pork Retail Sales Trends (vs. 2019): Consumer Expenditure and Quantity



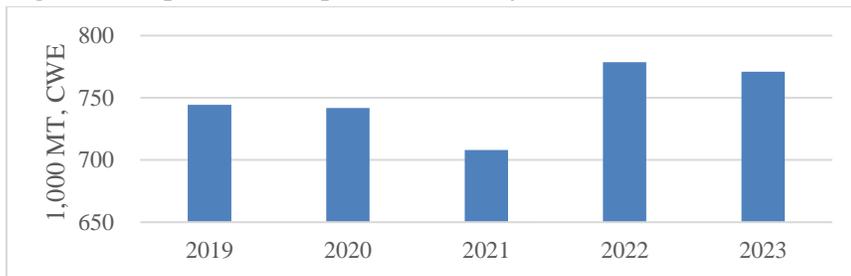
Source: MIAC

Trade

Competitive pricing of frozen pork sustains high demand by food processors as well as the HRI sectors: FAS/Tokyo projects that Japan's pork imports will be steady in 2024.

Japan's pork imports in 2023 are dipping below 2022 levels, which had spiked with imports of discounted Spanish frozen pork (Figure 13). Imports of chilled pork are balanced with current demands: some of the substitution from beef to pork is offset by higher import costs resulting from the weak yen in 2022 and 2023 (Figure 9). On the other hand, high domestic carcass prices also drive demand to use imported pork, so import demand should remain strong through the end of 2023.

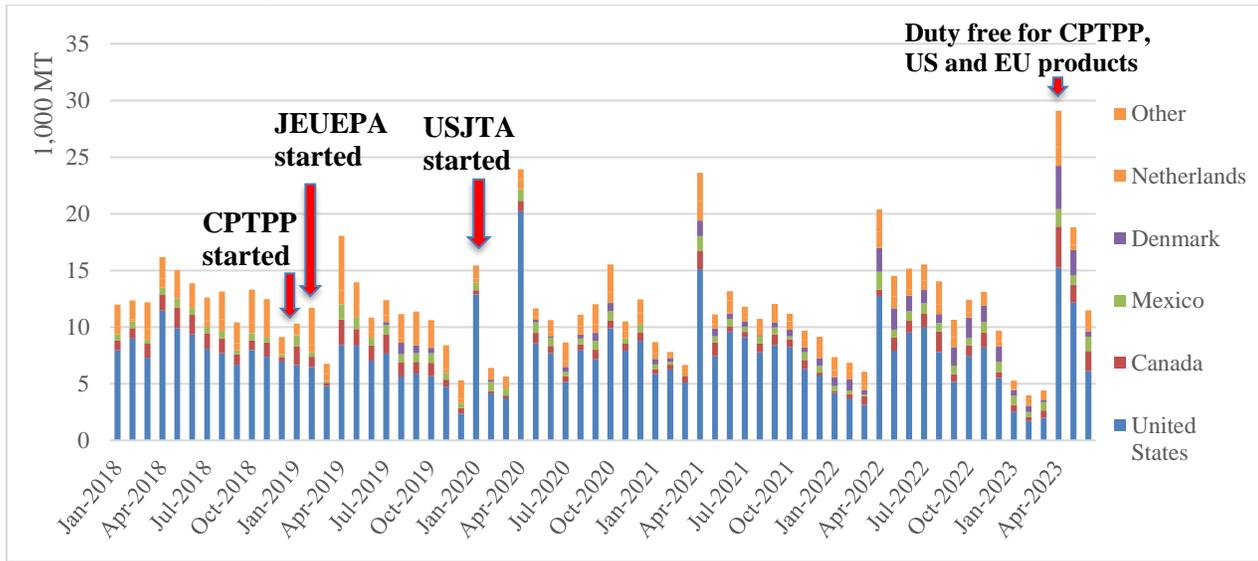
Figure 13 Japan Pork Imports in January and June



Source: TDM

Imports of prepared pork products in the first 6-months of 2023 are flat year on year, but FAS/Tokyo projects growth ahead in 2023 and 2024 as tariff cuts take effect, especially for ground seasoned pork (GSP), which is mainly intended for sausage manufacturing. Other meat processors also benefit from reduction of import duties: countries which enjoy the benefits of reduced import tariffs under Japan's major economic partnership agreements (EPAs) include: the United States under the U.S. -Japan Trade Agreements (USJTA); Canada and Mexico under the CPTPP; and Denmark and the Netherlands under the Japan - EU Economic Partnership Agreement (JEUEPA) (For details on USJTA, see [JA2023-0046](#)). The tariff on GSP, which was 20 percent of a base rate, started to decline for CPTPP members in December 2018; for EU members in February 2019; and for the United States in January 2020. Such a tariff is treated at the same level now for all member countries of the three trade agreements. For GSP, those tariffs became zero on April 1, 2023. As a result, imports from April through June in 2023 spiked 19 percent year on year (Figure 14).

Figure 14: Japan Imports of Processed Pork Products including GSP



Note: Products categorized in HS1602.42.090 are counted, in which ground seasoned pork (GSP) shares major volumed.

Source: TDM

Supplemental Tables

Supplemental Table 1: Beef Estimated Ending Stock Unit: Metric Ton (CWE converted)

Month / Year	2018	2019	% Chg.	2020	% Chg.	2021	% Chg.	2022	% Chg.	2023	% Chg.
Jan	145,222	166,097	14	170,359	3	171,802	1	182,940	6	211,111	15
Feb	141,490	165,995	17	165,749	0	170,091	3	181,540	7	210,710	16
Mar	132,692	157,678	19	172,506	9	159,766	-7	173,842	9	203,625	17
Apr	133,944	159,384	19	193,102	21	159,966	-17	171,378	7	217,811	27
May	141,770	162,872	15	200,967	23	167,597	-17	177,948	6	218,374	23
Jun	144,991	168,814	16	200,536	19	173,796	-13	193,688	11		
Jul	157,277	179,381	14	195,943	9	177,329	-9	204,815	15		
Aug	167,662	177,835	6	193,807	9	183,294	-5	217,441	19		
Sep	166,914	178,016	7	184,961	4	194,166	5	225,541	16		
Oct	167,644	179,936	7	181,011	1	200,691	11	224,328	12		
Nov	171,025	168,524	-1	173,552	3	190,873	10	221,290	16		
Dec	162,884	161,541	-1	169,323	5	182,080	8	211,570	16		

Source: MAFF

Supplemental Table 2: Pork Estimated Ending Stock Unit: Metric Ton (CWE converted)

Month / Year	2018	2019	% Chg.	2020	% Chg.	2021	% Chg.	2022	% Chg.	2023	% Chg.
Jan	229,785	213,056	-7	271,976	28	237,333	-13	230,454	-3	269,365	17
Feb	236,361	216,990	-8	270,555	25	239,556	-11	232,955	-3	271,734	17
Mar	235,266	216,436	-8	273,178	26	236,579	-13	234,124	-1	272,745	16
Apr	231,356	246,696	7	291,129	18	240,027	-18	249,876	4	292,003	17
May	234,372	268,588	15	306,465	14	241,118	-21	259,221	8	317,324	22
Jun	232,077	269,469	16	305,595	13	244,048	-20	277,459	14		
Jul	228,848	278,667	22	293,088	5	239,940	-18	287,690	20		
Aug	228,839	286,966	25	287,101	0	244,999	-15	296,830	21		
Sep	217,827	283,667	30	276,992	-2	243,645	-12	290,996	19		
Oct	215,679	284,658	32	265,444	-7	237,649	-10	280,547	18		
Nov	212,442	276,873	30	253,486	-8	229,262	-10	278,599	22		
Dec	208,469	262,958	26	244,804	-7	219,164	-10	266,798	22		

Source: MAFF

Supplemental Table 3: Japan Beef Cattle Inventory Unit: Farm/head

Year Beginning (As of Feb. 1)	Total Number of Farms	Grand Total (Beef and Dairy Breed Combined)	Beef Breed Total				Cows for Breeding (Cow Calf Rearing)
			Beef Breed Total	Black Wagyu	Brown Wagyu	Others	
2012	65,200	2,723,000	1,831,000	1,773,000	22,700	35,700	642,200
% Chg.	-6	-1	-2	-2	-7	-8	-4
2013	61,300	2,642,000	1,769,000	1,714,000	21,700	33,300	618,400
% Chg.	-6	-3	-3	-3	-4	-7	-4
2014	57,500	2,567,000	1,716,000	1,663,000	21,100	31,900	595,200

% Chg.	-6	-3	-3	-3	-3	-4	-4
2015	54,400	2,489,000	1,661,000	1,612,000	20,800	28,300	579,500
% Chg.	-5	-3	-3	-3	-1	-11	-3
2016	51,900	2,479,000	1,642,000	1,594,000	20,500	27,400	589,100
% Chg.	-5	0	-1	-1	-1	-3	2
2017	50,100	2,499,000	1,664,000	1,618,000	21,000	25,000	597,300
% Chg.	-3	1	1	2	2	-9	1
2018	48,300	2,514,000	1,701,000	1,653,000	21,800	26,500	597,300
% Chg.	-4	1	2	2	4	6	0
2019	46,300	2,503,000	1,734,000	1,683,000	22,200	28,900	625,900
% Chg.	-4	0	2	2	2	9	5
2020	43,900	2,555,000	1,792,000	1,735,000	23,300	33,500	558,700
% Chg.	-5	2	3	3	5	16	-11
2021	42,100	2,604,000	1,829,000	1,772,000	23,100	33,800	567,000
% Chg.	-4	2	2	2	-1	1	1
2022	40,400	2,614,000	1,812,000	1,758,000	23,000	31,300	574,600
% Chg.	-4	0	-1	-1	0	-7	1
2023	38,600	2,687,000	1,882,000	1,833,000	23,800	25,900	577,500
% Chg.	-4	3	4	4	3	-17	1

Note: The numbers are based on Japan's Individual Identification Information of Cattle since 2020

Source: MAFF Livestock Statistics

Japan Beef Cattle Inventory cont'd

Unit: Farm/Head

Year Beginning (As of Feb. 1)	Dairy Breed Total				Average Number of Cattle Raised per Farm
	Dairy Breed Total	Holstein and Others	F-1 Crossbreed (Holstein x Wagyu)	% Share of F-1 Cross Breed in Total Dairy Breed	
2012	891,700	392,500	499,100	56	42
% Chg.	0	-5	3		5
2013	873,400	375,500	497,900	57	43
% Chg.	-2	-4	0		3
2014	851,400	367,500	483,900	57	45
% Chg.	-3	-2	-3		3
2015	827,700	345,300	482,400	58	46
% Chg.	-3	-6	0		3
2016	837,100	331,800	505,300	60	48
% Chg.	1	-4	5		4
2017	834,700	313,100	521,600	62	50
% Chg.	0	-6	3		4
2018	813,000	295,100	517,900	64	52
% Chg.	-3	-6	-1		4
2019	768,600	274,400	494,200	64	54

% Chg.	-5	-7	-5		4
2020	763,400	267,900	495,400	65	58
% Chg.	-1	-2	0		8
2021	775,200	249,400	525,700	68	62
% Chg.	2	-7	6		6
2022	802,200	246,900	555,300	69	65
% Chg.	3	-1	6	2	5
2023	804,400	234,800	569,600	71	70
% Chg.	0	-5	3	2	8

Note: The numbers are based on Japan's Individual Identification Information of Cattle since 2020

Source: MAFF Livestock Statistics

Supplemental Table 4: Japan Dairy Cow Inventory

Unit: Farm/Head

Year Beginning (As of Feb. 1)	Total Number of Dairy Farms	Total Number of Dairy Cows	Dairy Cows				Heifers	Animals Raised per Farm	
			(Over Two Years of Age)				(Less Than Two Years of Age)		
			Total	Cow			Heifer		
				Sub Total	Milking	Dry			
2012	20,100	1,449,000	1,012,000	942,600	812,700	129,900	69,700	436,700	72
2013	19,400	1,423,000	992,100	923,400	798,300	125,100	68,700	431,300	73
% Chg.	-3	-2	-2	-2	-2	-4	-1	-1	2
2014	18,600	1,395,000	957,800	893,400	772,500	121,000	64,400	436,800	75
% Chg.	-4	-2	-3	-3	-3	-3	-6	1	2
2015	17,700	1,371,000	934,100	869,700	750,100	119,600	64,400	437,200	78
% Chg.	-5	-2	-2	-3	-3	-1	0	0	3
2016	17,000	1,345,000	936,700	871,000	751,700	119,300	65,800	408,300	79
% Chg.	-4	-2	0	0	0	0	2	-7	2
2017	16,400	1,323,000	913,800	852,100	735,200	116,900	61,700	409,300	81
% Chg.	-4	-2	-2	-2	-2	-2	-6	0	2
2018	15,700	1,328,000	906,900	847,200	731,100	116,100	59,700	421,100	85
% Chg.	-4	0	-1	-1	-1	-1	-3	3	5
2019	15,000	1,332,000	900,500	839,200	729,500	109,700	61,300	431,100	89
% Chg.	-4	0	-1	-1	0	-6	3	2	5
2020	14,400	1,352,000	900,700	839,600	716,000	123,600	61,100	451,600	94
% Chg.	-4	2	0	0	-2	13	0	5	6
2021	13,900	1,356,000	910,000	849,300	726,000	123,300	60,700	446,400	98
% Chg.	-3	0	1	1	1	0	-1	-1	4
2022	13,300	1,371,000	924,000	861,700	736,500	125,200	62,300	447,200	103
% Chg.	-4	1	2	1	1	2	3	0	6
2023	12,600	1,356,000	896,400	836,600	714,500	122,100	59,800	459,300	108
% Chg.	-5	-1	-3	-3	-3	-2	-4	3	4

Note: 99 percent of dairy cows raised in Japan are Holstein breed.

Source: MAFF Livestock Statistics

Supplemental Table 5: Japan Swine Inventory

Unit: Farm/Head

Year Beginning (As of Feb. 1)	Number of Swine Farms		Number Raised					Average Number of Swine Raised per Farm
		Of Farms with Breeding Sows	Total	Breeding Sows	Breeding Males	Hogs	Others	
2003	9,430	8,290	9,725,000	929,300	66,000	8,057,000	673,000	1031.3
2004	8,880	7,770	9,724,000	917,500	63,000	8,052,000	690,900	1095
2005	Census Year							
2006	7,800	6,780	9,620,000	907,100	60,000	7,943,000	710,700	1233.3
2007	7,550	6,560	9,759,000	915,000	58,000	8,119,000	667,100	1292.6
2008	7,230	6,250	9,745,000	910,100	57,400	8,117,000	660,900	1347.9
2009	6,890	5,930	9,899,000	936,700	57,100	8,220,000	685,700	1436.7
2010	Census Year							
2011	6,010	5,110	9,768,000	901,800	51,800	8,186,000	628,700	1625.3
2012	5,840	4,900	9,735,000	900,000	51,900	8,145,000	638,700	1667
% Chg.	-3	-4	0	0	0	-1	2	3
2013	5,570	4,620	9,685,000	899,700	49,100	8,106,000	629,500	1738.8
% Chg.	-5	-6	-1	0	-5	0	-1	4
2014	5,270	4,290	9,537,000	885,300	47,500	8,020,000	583,300	1809.7
2015	Census Year							
2016	4,830	3,940	9,313,000	844,700	42,600	7,743,000	682,500	1,928.20
2017	4,670	3,800	9,346,000	839,300	43,500	7,797,000	666,100	2,001.30
% Chg.	-3	-4	0	-1	2	1	-2	4
2018	4,470	3,640	9,189,000	823,700	39,400	7,677,000	649,600	2,056
% Chg.	-4	-4	-2	-2	-9	-2	-2	3
2019	4,320	3,460	9,156,000	853,100	36,300	7,594,000	673,200	2,119
% Chg.	-3	-5	0	4	-8	-1	4	3
2020	Census Year							
2021	3,850	3,040	9,290,000	823,200	32,000	7,676,000	758,800	2,413
2022	3,590	2,750	8,949,000	789,100	30,000	7,515,000	615,400	2,493
% Chg.	-7	-10	-4	-4	-6	-2	-19	3
2023	3,370	2,640	8,956,000	791,800	26,800	7,512,000	625,400	2,658
% Chg.	-6	-4	0	0	-11	0	2	7

Source: MAFF Livestock Statistics

Supplemental Table 6: Japan Beef *Marukin* Payments (Continued on next page)

		Prefectures Applied	Wagyu		Cross breed	Dairy
			Lowest payment	Highest payment		
2018	Dec	0	N/A	N/A	-	39,700
2019	Jan	11	3,966	159,811	-	54,379
	Feb	8	8,315	87,492	-	4,69.4
	Mar	11	1,773	86,398	-	74,024
	Apr	1	-	17,067	-	42,722
	May	11	4,739	31,689	-	30,806
	Jun	4	4,014	50,013	-	31,029

	Jul	11	308	50,163	-	35,702
	Aug	24	174	79,302	-	26,906
	Sep	21	2,757	88,939	-	28,826
	Oct	21	5,660	69,293	15,271	48,722
	Nov	9	1,812	99,875	356	53,726
	Dec	16	2,237	62,574	-	63,042
2020	Jan	17	2,642	138,966	-	47,339
	Feb	30	609	152,529	24,129	39,319
	Mar	47	52,835	295,419	116,716	54,563
	Apr	47	121,079	468,145	144,130	48,145
	May	47	92,851	306,934	142,220	42,925
	Jun	46	76,555	236,813	190,413	48,078
	Jul	43	22,789	233,821	180,387	39,031
	Aug	46	36,643	225,514	114,807	51,616
	Sep	45	1,510	208,831	122,920	39,206
	Oct	38	5,140	108,545	131,468	37,969
	Nov	10	4,316	57,595	79,365	38,144
	Dec	2	3,942	58,624	29,124	38,791
2021	Jan	12	475	59,029	17,069	43,454
	Feb	26	2,534	63,665	61,906	48,484
	Mar	2	2,390	67,380	19,994	54,923
	Apr	0	-	-	-	33,157
	May	14	16	21,333	-	21,421
	Jun	14	1,170	34,965	26,485	29,786
	Jul	2	3,860	8,063	36,498	29,957
	Aug	35	220	67,057	60,016	27,918
	Sep	22	6,278	34,106	20,589	35,327
	Oct	0	-	-	13,215	17,778
	Nov	0	-	-	-	30,296
	Dec	1	-	34,151	-	40,420
2022	Jan	1	-	21,054	-	50,296
	Feb	1	-	13,879	12,520	51,054
	Mar	0	-	-	-	50,246
	Apr	0	-	-	-	32,559
	May	0	-	-	-	36,067
	Jun	0	-	-	30,939	43,892
	Jul	3	2,622	11,051	34,163	38,372
	Aug	34	4,014	107,300	43,261	44,453

	Sep	30	2,516	73,365	21,558	40,459
	Oct	30	13,813	70,182	10,292	43,010
	Nov	29	5,854	53,399	1,766	36,965
	Dec	23	22,550	52,936	-	49,166
2023	Jan	44	9,399	105,317	12,947	43,471
	Feb	39	2,534	127,548	46,034	45,993
	Mar	44	12,920	125,613	10,440	56,793
	Apr	18	582	45,043	-	39,470
	May	39	1,327	117,778	9,734	40,943

Note: "N/A" indicates no data and "-" indicates no payment was made.

Source: ALIC

Attachments:

No Attachments