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Report Highlights: The Snow Brand food poisoning incident this past summer heightened Japanese consumer concerns about the safety of dairy products and foods in general. Sluggish consumer demand for NFDN-based milk, beverages and dairy products has resulted in rising stocks of NFDN and butter. Though still inconclusive, it appears this incident further slowed demand for these products. In response to these concerns, the dairy product processing industry is shifting to more use of fluid milk over NFDN. Japan's cheese consumption is forecast at a record level with consumer preferences shifting to natural cheese. Imports of U.S. processed cheese and EU natural cheeses also increased, while imports of Australia/N.Z. raw material natural cheeses declined.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

During the summer of 2000 contaminated milk products sold by Japan's top dairy manufacturer caused food poisoning of more than 16,000 people. Investigations revealed the cause was contaminated non-fat dry milk (NFDM) produced by one of the Snow Brand production plants (see JA0026 & JA0101). This product was used to manufacture drinking milk products such as calcium enriched milk, low-fat milk, and yogurt drink. The poisoning incident had a nationwide impact on consumer perceptions of food safety leading to regulatory actions and changes in dairy product ingredient use by the industry.

The Snow Brand incident appears to have depressed production and consumption of certain dairy products during August 2000, the latest available data. Dairy product manufacturers shifted their use of raw milk in drinking milk products thus changing the ingredient demand for NFDM in the second half of 2000, adding to already lethargic sales of NFDM-based dairy products. Whether these trends continue remains to be seen.

The food poisoning incident also heightened consumer's safety concerns and prompted safety officials to enhance HACCP monitoring and labeling requirements. Officials closed certain dairy production facilities. Further, officials are considering new requirements on labeling of raw milk content for various drinking milk products. MAFF convened food safety experts and requested a full report and recommendations by this Fall. For the time being, it appears Japanese dairy manufacturers are voluntarily labeling the content of raw milk in various drinking milk products through a ruling by private fair trade councils. Japan's consumers and producers will likely welcome these labeling measures, thus encouraging increased use of raw milk in drinking milk products in general, while dairy manufacturers may have face increased production costs by increasing use of more expensive fluid milk and decreasing use of more inexpensive, subsidized NFDM, butter and cream.

Despite decreased milking cow inventory data at the year beginning, Japan's fluid milk production in 2000 has been on the rise, largely due to increased productivity of cows put in the production cycle. Post projects fluid milk production to rise slightly above the previous year's level to 8.50 million MT with fluid milk production for drinking at 4.95 million MT, roughly the same as the previous year, and processing utilization at 3.45 million MT, up 2% from a year ago.

Japan's NFDM demand is forecast to fall 4% from the previous year due to weak sales of NFDM-based drinking milk and dairy products. While the domestic output of NFDM is forecast to rise 3% this year, the Snow Brand incident caused a plunge in milk factory output of processed milk and milk beverages this summer, raising monthly ending stocks of NFDM. As a result, Japan will likely not require NFDM imports in excess of the current access NFDM for general food use (16,500 MT) this year, limiting prospects for Australia and New Zealand exports of NFDM to Japan in 2000.

A surplus of butter has continued this year with rising monthly ending stocks due to increased domestic butter output coupled with reduced market demand for butter. The reduced demand for butter (salt less) for use in drinking milk products is attributable for the decline, more than offsetting fair demand for portioned products in the retail/confection and bakery use sectors.

In Japan's cheese market, solid demand for natural cheeses for consumption is sustaining growth of Japan's cheese imports in 2000. Imports are up 5% from a year before to 197,000 MT. Combined with anticipated increases in domestic cheese production, particularly of natural cheeses for direct consumption this year, Japan's demand for cheeses is forecast to reach a record level of 233,000 MT. Consumer preferences for natural

cheeses coupled with the weak Euro against Japanese yen will result in increased imports of EU products in 2000. On the other hand, the Snow Brand incident may dampen demand for domestic-branded cheese products in Japan, reducing demand for raw material natural cheese from Australia and New Zealand for domestic branded processed cheeses this year.

Imports of U.S. cheese in 2000 are forecast to increase 7% from 1999 to 4,300 MT due to solid retail and HRI sector demand for powdered/grated natural cheeses, fresh natural cream cheeses, and fresh/frozen cheese (IQF). According to the U.S. Dairy Export Council's Tokyo Office, one factor is a series of successful U.S. natural white cream cheese campaigns effectively utilized by Japan's major coffee shop chains for sandwiches.

Fluid Milk Section

Decreased Cow Numbers But Increased Productivity Raises Milk Output in 2000; Snow Brand Incident Shifts Utilization of Milk Towards Drinking Use Production

The Snow Brand food poisoning incident changed Japan's fluid raw milk utilization during 2000. Post revises the semiannual report projection for drinking utilization from a "slight drop" to "flat" because of temporary surges in fluid milk use for drinking milk products which occurred after the incident. As a result, Japan's fluid milk utilization in 2000 for drinking uses (milk, processed milk beverages, fermented products, etc.) is forecast to remain about the same as 1999 at 4.95 million MT. Fluid raw milk utilization for factory use consumption (for NFDM, other milk powders, butter, cream and cheese etc.), is forecast to rise 2% to 3.45 million MT.

Japan's fluid milk production in 2000 is forecast to slightly increase from a year ago to 8.50 million MT. Despite lowered milking cow inventories at the year beginning, output per cow has increased in part due to a favorable climate. According to MAFF data, during January to July, milk produced per cow a day averaged 27.1 kilos in Hokkaido and 27.2 kilos in other milk producing regions, up 1% and 4% respectively over the same period of the previous year. Although the growth pace of fluid milk production is expected to slow down during the second half due to the lengthy hot summer, the increase achieved during the first half will likely offset the second half slow down.

Snow Brand Incident Raises Public Concerns About Food Safety, Increases Awareness About Milk Content in Dairy Products, and Leads to Labeling of Fluid Milk Content in Drinking Milk Products

Though still preliminary, the Snow Brand food poisoning incident impacted on Japan's fluid milk utilization patterns as follows:

- 1) Japanese consumers became more cautious and doubtful about food safety management by manufacturers for not only dairy products but all foods and drinks. The past summer witnessed a surge in the number of product claims reported in the media for foods and drinks containing foreign materials, strange tastes and strange smells. In response, health authorities enhanced safety standards through a stricter implementation of HACCP at milking and dairy processing plants.
- 2) Extensive media coverage of the Snow Brand incident opened a public debate over the fluid milk content in various drinking milk products and whether it should be labeled. Although drinking milk products, mainly reconstituted from NFDM, butter and cream, have been on the market for some time and remain popular among health conscious Japanese consumers, the labeling of raw milk used in these products has not been clear. Prior

to the Snow Brand incident, some consumers believed that low fat milk was produced from mostly raw milk, but the incident helped educate consumers that low fat milk is often composed of NFDM and other non-fluid milk ingredients. According to MAFF's 1998 estimate, the fluid raw milk content in processed milk averaged 42.5 %, while for milk beverages the fluid milk percentage averaged only 9.3%.

In response to these consumer concerns, MAFF convened industry experts. Depending on the recommendations of these experts, Japanese dairy manufacturers may need to indicate the percentage of raw milk on product labels under a ruling by private fair trade councils (not mandated by MAFF or GOJ). Recommendations are expected by this Fall. If the labeling requirement is put in place, Japanese dairy manufacturers may further shift fluid raw milk utilization patterns towards more drinking and less processing use.

Though the labeling move may be welcomed by consumers and dairy producers, the move towards more fluid milk use may conflict with the dairy industry's business interests. Due to the deficiency payment scheme, Japan's dairy manufactures can purchase fluid milk to make processed milk, milk beverages, and fermented milk products more cheaply than if the milk is intended for fluid milk for drinking use. Therefore, subsidized dairy products such as NFDM and butter are cheaper ingredients for domestic dairy manufacturers to market more processed milk and milk beverages. These processed dairy products can be sold at almost the same price as regular milk in the retail market relative to raw material costs.

The labeling of raw milk content in drinking milk products may also impact Japan's new dairy policy subsidy scheme for NFDM and butter and the price of drinking milk negotiated between dairy manufacturers and milk producers. Post will submit a report concerning the GOJ's dairy subsidy program including implications of any labeling changes on GOJ's new dairy policy scheme and dairy manufacturers' fluid milk utilization patterns.

In response to consumer concerns, Japanese dairy manufactures increased production of regular milk at milk factories by 3% in both July and August. In contrast, production of other drinking milk products dropped considerably as shown in the table below. According to one industry source, fluid milk for drinking uses shipped out of Hokkaido to major milk consumption areas in Honshu Island increased dramatically this summer.

Japanese Utilization of Fluid Milk for Drinking Use Category

Period: January - August 1999 - 2000

Unit: 1,000 Kilo Liters

	1999 (Jan. - June)	2000 (Jan.- June)	% Chg.	July	% Chg.	Aug.	% Chg.
Regular Milk	1,907	1,869	-2%	343	3%	330	3%
Processed Milk	371	359	-3%	58	-15%	56	-20%
Milk Beverages	589	613	4%	106	-6%	103	-12%
Fermented Milk	370	355	-4%	60	-9%	55	-10%

Lactic Acid Bacteria Drinks	90	86	-4%	16	-2%	14	6%
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Processed Milk; low fat, high fat, vitamin and mineral fortified, calcium enriched, etc.

Milk Beverages; flavored (coffee and fruits flavored, etc.)

Source: Agriculture & Livestock Industry Corporation (ALIC)

Non Fat Dry Milk Section

Japan's NFDM Demand to Fall During 2000 Due to Weak Sales of NFDM-Based Products; Snow Brand Incident Causes Plunge in Output of Processed Milk and Milk Beverages

The Snow Brand food poisoning incident also impacted Japan's demand and supply of non fat dry milk in 2000. The industry demand for NFDM, particularly for use in processed milk and milk beverages, plunged after the incident. Demand for NFDM for ingredient use fell this year as sales slowed for some yogurt and ice cream products of a non-premium category which use NFDM, more than offsetting solid demand for NFDM in the confection and bakery sector.

Utilization of NFDM by Japanese dairy and food manufacturers is reported as follows: in-house consumption by dairy manufacturers 53%; lactic acid bacteria and fermented dairy product manufacturers 14%; confection and bakery 7%; ice cream and other dairy manufacturers who do not produce NFDM by themselves 6%; and soft drink beverages 6%.

The decline in demand for NFDM, coupled with increased domestic NFDM output in the first half (up 7% from the previous year's first half), pushed upwards monthly ending stock levels in the first half this year 16% higher than 1999 at 59,000 MT. In turn, monthly domestic traders' price quotes of NFDM for bulk end users during the first half this year remained static with June priced at 13,638 yens for a 25-kilo bag.

Increased Domestic NFDM Production, Coupled with Reduced Ingredient Demand for NFDM, Limits Need for NFDM Imports in Excess of Current Access Volume in 2000

Post projects Japan's annual total utilization of NFDM in 2000 to decrease 4% from a year ago level to 247,000 MT. This year's NFDM import forecast is now 53,000 MT, utilized for the school lunch program, feed and other general foods, down 7% from the previous year. Additional imports of NFDM for general food use exceeding this fiscal year's current access volume (16,500 MT - for general food use purposes) are not anticipated. The weak demand for NFDM is not good news for Australia and New Zealand, major NFDM suppliers to Japan. To date, Japan imported 13,000 MT of the current access NFDM. Of the above total, 8,000 MT has already been released in the market in mid August. MAFF/ALIC plans to import the remaining 3,500 MT this fiscal year for earlier releases of the remaining balance of 8,500 MT through the pilot market auction.

After the Snow Brand incident broke-out in June 2000, July domestic NFDM output plunged 21% from a year ago mainly due to surges in demand for fluid milk for drinking use coupled with reduced output of fluid milk from the hot summer weather. Japan's July fluid milk output fell 2% and though the NFDM supply situation is temporarily tight, demand for NFDM based dairy products is weak. As a result, July monthly ending stocks were up 17% over last year.

In response to the fall in fluid milk output, MAFF's released the current access NFDM imported in mid August to relieve tight supplies of NFDM, particularly for confection and bakery uses. Post expects the pace of increased domestic NFDM production in the first half to slow down somewhat during the second half, bringing Japan's annual domestic production of NFDM up to 197,000 MT for 2000, up 3% from a year ago.

Japanese Imports of NFDM by Use

Period: Jan. - July 1999 - 2000

Unit: Metric Ton

	1999 (Jan. - July)	2000 (Jan. - July)	% Chg.
For School Lunch	1,998	1,773	-11%
For Feeds	17,092	17,106	0%
For Others	12,727	14,888	17%
Total	31,807	33,767	6%

Note: Others include mostly the current access imports for general food use.

Source: Monthly Statistics, Agriculture & Livestock Industry Corporation (ALIC)

Butter Section

Reduced Demand for Butter Used for Drinking Milk Products Leads to Butter Surplus in 2000

As a result of increased domestic NFDM production in 2000, post forecasts Japan's annual domestic butter production to reach 92,000 MT, up 7% from a year ago. Demand for butter is forecast to moderately fall from the previous year and is estimated at 80,000 MT due to stagnant market demand for salt-less butter for drinking milk utilization. As a result, high levels of unconsumed butter stocks for ingredient use are anticipated at year end, raising GOJ/Industry concerns how to manage the surpluses.

Weak wholesale prices for butter attest to this surplus, particularly for dairy ingredient use. Industry sources report that rising butter stocks are attributable to slackened use of salt-less butter to manufacture reconstituted milk and milk beverages. In response, some dairy manufacturers are changing the composition of ingredient from cream to butter to increase the butter utilization in some dairy products. As a result, monthly wholesale prices of butter (ingredient use for bulk end users) have fallen in 2000 with August price down 3% from a year before at 948 yens per kilo and monthly ending stock levels on the rise. July ending stock is estimated to be at 45,800 MT, up 23% compared to the same month of the previous year.

In the retail sector, demand for butter has been stable while reduced supplies of Snow Brand products have reduced availability of some products. Dessert and confection demand for butter has been firm this year. Overall, reduced utilization of butter for reconstituted milk and milk beverages has dampened this year's market outlook for butter in Japan.

Cheese Section

Fueled by Strong Demand for Natural Cheese, Japan's Cheese Consumption Reaches Historic High in

2000

Japan's total cheese consumption in 2000 is forecast to grow 5% over the previous year and reach a record 233,000 MT. Solid demand for natural cheeses for direct consumption is expected to outpace slackened demand for processed cheeses in 2000. Overall cheese consumption growth in Japan will also pull up this year's imports of all cheeses to a historic high.

Consumer Preferences For Natural Cheeses in Japan, Coupled with Weak Euro, Favors Increased Imports from EU in 2000, But Import Demand for U.S. Processed Cheeses Also Expands

Based on trade data for 2000 through August, Japan's imports of cheese in 2000 are expected to increase 5% from 1999 to 197,000 MT. Japanese consumer preferences towards natural cheeses, rather than processed cheeses, has fueled demand for various types of European natural cheeses in recent years supported by the Euro cuisine boom (particularly Italian). The weak Euro this year has further strengthened the European position in the natural cheese market.

In contrast to the natural cheese market, the lethargic demand for domestic-branded processed cheese was exacerbated by the Snow Brand incident. As a result, imports of Australia and New Zealand natural cheese within the pooled quota fell 4%, while natural cheeses in other category showing 7% growth. Domestic-branded processed cheeses are made by blending imported and domestically produced natural cheeses.

In response to the preference shift in the market, domestic cheese manufacturers are starting to gear-up production of branded natural cheeses for consumption in the retail sector. Snow Brand is the top branded cheese manufacturer in Japan and has the largest share of branded processed cheeses shipped for the retail market. A 3% reduction in household purchases of cheeses during January - August 2000 may be a reflection of the above situation.

Japan's overall increased imports of Australian cheese shown in the trade matrix for 2000, forecast to rise 5% to 86,500 MT, is due to increased imports of fresh cheeses (other category). Imports of fresh cheeses from Australia include mostly high fat cheese products. Earlier this year, the HS committee ruled this product should be classified as a "dairy spread" category. The Japanese dairy industry has been using the product as an inexpensive source of a butter substitute. The HS committee's decision is expected to be made during this fall against Australia's appeal on this case. If the committee retains its earlier ruling, it may be a good news for Japan's surplus butter market, but may hurt some businesses who have been using inexpensive, imported butter substitute.

Imports of U.S. cheeses in 2000 are expected to rise 7% rise from a year before to 4,300 MT. The increase is attributable to solid demand in the retail and HRI sectors for U.S. powdered/grated natural cheeses and fresh natural cream cheeses and fresh frozen cheese (IQF). According to the U.S. Dairy Export Council's Tokyo office, Japan's major coffee shop chains participated in a series of U.S. natural white cream cheese campaigns, and cheese-containing sandwich snacks are selling well this year. Frozen IQF cheese is mainly used for pizza meals and Japan's major family restaurant chains are major clients of U.S. fresh frozen cheese. The United States is reportedly a dominant supplier in fresh cheeses in the frozen/5kg or more category.

Japanese Cheese Imports by Category

Unit: Metric Ton (Customs Clearance Basis)

	1999 Jan. - Aug.	2000 Jan. - Aug.	% Chg
Fresh Cheeses (Other)	33,108	38,728	17%
Fresh Cheeses (Within Pooled Quota)	663	1,016	53%
Fresh Cheeses (Frozen/5Kg or More)	447	631	41%
Grated/Powdered Cheeses (Processed)	1,616	1,375	-15%
Grated/Powdered Cheeses (Natural)	1,042	1,362	31%
Processed Cheeses (Not Grated/Powdered)	2,367	2,894	22%
Blue-veined Cheeses (Other)	458	423	-8%
Natural Cheeses (Within Pooled Quota)	28,434	27,271	-4%
Natural Cheeses (Other)	51,318	54,843	7%
All Cheese Total (Jan. - Aug.)	119,453	128,543	8%

Source: World Trade Atlas (1999 data), Industry Press (2000 data - Aug. WTA was not available in hand)

Note: Cheeses imported within the pooled quota are used as raw materials for Japan's processed cheese production, which is mixed with domestic cheeses. Others category is for direct consumption.

Japanese Fluid Milk PS&D Table

PSD Table						
Country	Japan					
Commodity	Dairy, Milk, Fluid			(1000 HEAD)(1000 MT)		
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Cows In Milk	1008	1008	1000	992	0	990
Cows Milk Production	8457	8457	8420	8500	0	8500
Other Milk Production	0	0	0	0	0	0
TOTAL Production	8457	8457	8420	8500	0	8500
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	0	0	0	0	0	0
TOTAL SUPPLY	8457	8457	8420	8500	0	8500
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Fluid Use Dom. Consum.	4949	4949	4900	4950	0	4950
Factory Use Consum.	3408	3408	3420	3450	0	3450
Feed Use Dom. Consum.	100	100	100	100	0	100
TOTAL Dom. Consumption	8457	8457	8420	8500	0	8500
TOTAL DISTRIBUTION	8457	8457	8420	8500	0	8500
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Japanese Non Fat Dry Milk PS&D Table

PSD Table						
Country	Japan					
Commodity	Dairy, Milk, Nonfat Dry			(1000 MT)		
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	43	43	34	34	36	37
Production	192	192	195	197	0	195
Intra EC Imports	0	0	0	0	0	55
Other Imports	57	57	67	53	0	0
TOTAL Imports	57	57	67	53	0	55
TOTAL SUPPLY	292	292	296	284	36	287
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Human Dom. Consumption	226	226	230	215	0	220
Other Use, Losses	32	32	30	32	0	30
Total Dom. Consumption	258	258	260	247	0	250
TOTAL Use	258	258	260	247	0	250
Ending Stocks	34	34	36	37	0	37
TOTAL DISTRIBUTION	292	292	296	284	0	287
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Japanese Butter PS&D Table

PSD Table						
Country	Japan					
Commodity	Dairy, Butter				(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	25	25	29	29	35	41
Production	86	86	88	92	0	90
Intra EC Imports	0	0	0	0	0	0
Other Imports	0	0	0	0	0	0
TOTAL Imports	0	0	0	0	0	0
TOTAL SUPPLY	111	111	117	121	35	131
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Domestic Consumption	82	82	82	80	0	82
TOTAL Use	82	82	82	80	0	82
Ending Stocks	29	29	35	41	0	49
TOTAL DISTRIBUTION	111	111	117	121	0	131
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Japanese Cheese PS&D Table

PSD Table						
Country	Japan					
Commodity	Dairy, Cheese				(1000 MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	15	15	15	15	15	15
Production	35	35	36	36	0	37
Intra EC Imports	0	0	0	0	0	0
Other Imports	187	187	190	197	0	200
TOTAL Imports	187	187	190	197	0	200
TOTAL SUPPLY	237	237	241	248	15	252
Intra EC Exports	0	0	0	0	0	0
Other Exports	0	0	0	0	0	0
TOTAL Exports	0	0	0	0	0	0
Human Dom. Consumption	222	222	226	233	0	237
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	222	222	226	233	0	237
TOTAL Use	222	222	226	233	0	237
Ending Stocks	15	15	15	15	0	15
TOTAL DISTRIBUTION	237	237	241	248	0	252
Calendar Yr. Imp. from U.S.	0	0	0	0	0	0
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0

Japanese Cheese Trade Matrix

Import Trade Matrix			
Country	Japan		
Commodity	Dairy, Cheese		
Time period	Jan. - Dec.	Units:	MT
Imports for:	1999		2000
U.S.	4023	U.S.	4300
Others		Others	
Australia	78447	Australia	86500
New Zealand	50655	New Zealand	48000
France	4918	France	5700
Germany	7821	Germany	9800
Netherlands	7586	Netherlands	8800
Denmark	12436	Denmark	12500
Norway	7844	Norway	7000
Canada	4743	Canada	4700
Total for Others	174450		183000
Others not Listed	8431		9700
Grand Total	186904		197000