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Annual Report

2004

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Report Highlights:
Japan's beef supply situation expected to remain tight in 2005, assuming the ban on U.S. beef continues. Imports from Australia and New Zealand are expected to increase in 2005, but the supply shortfall will remain. Domestic production is anticipated to rise by 1% due to strong demand and increased numbers of animals at slaughter age. Pork consumption expected to remain strong in 2005 at 2.473 million MT, supported by the absence of U.S. beef, and ongoing bans on poultry from China and Thailand. Pork imports are expected to ease however due to high stocks. Imports from the United States are forecast to increase slightly due to solid demand for chilled pork in the food service industry.

Includes PSD Changes: Yes
Includes Trade Matrix: No
Annual Report
Tokyo [JA1]
[JA]

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The 2005 livestock market outlook projections are based on the assumption that Japan's import ban on U.S. beef due to BSE will remain. This assumption does not reflect any USDA position on ongoing trade discussions. Post will make revisions as developments warrant. Please also note that imports of prepared and processed beef and pork products are incorporated into the import and consumption figures in the PS&D tables. The factor used to convert product weight equivalent (PWE) to carcass weight equivalent (CWE) for beef and pork is 1.43 (1/0.7), which is used in Japan's official livestock statistics. Conversion factors (PWE to CWE) for prepared and processed products are 1.79 (1/0.56) for beef and 1.43 (1/07) for pork. Unless specified, volumes are on a CWE basis. Regarding the discussion of the beef and pork safeguards, customs clearance and product weight equivalent figures are used as reported by the Government of Japan (GOJ).

Beef Section

2005 Market Outlook

Supply Deficit, Low Consumption, and High Prices in 2005

Japan's 2005 total beef consumption, including imported prepared and processed products, is projected at 1.116 million MT, a slight decline from 2004, and well below levels prior to the detection of BSE in Japan in 2001. Assuming that Japan maintains its import ban on U.S. beef, Japan's beef market will continue to suffer from a huge supply deficit, similar to the situation in 2004. This will continue to hurt the food service industry, a large end user of imported beef. Monthly ending beef stocks will remain fairly tight in 2005, along with high market prices.

Australia and New Zealand will remain as the primary suppliers of imported beef in 2005. Total imports are projected at 611,000 MT (585,000 MT for chilled and frozen beef and 26,000 MT for prepared and processed products), slightly higher than 2004 levels, but nearly 30% lower than 2003, prior to the ban on U.S. beef. In the absence of U.S. beef, demand for Australian short grain fed chilled beef will remain strong, although limited supplies will keep market prices high. According to trade sources, there are no other viable suppliers other than Australia (90%) and New Zealand (10%).

Domestic beef production in 2005 is expected to rise by 1% to 505,000 MT, reflecting increased numbers of Wagyu steers and heifers coming to slaughter age (28 – 32 months). The dairy beef (F1 cross breed steer/heifer and Holstein steer and cow) slaughter (20 – 24 months) is projected at about the same level as 2004.

Japan's Beef Safeguard a Concern in 2005

Beef safeguard trigger levels for the first quarter of Japan's Fiscal Year (JFY) 2005 (April – June) are calculated at only 61,468 MT (PWE) for chilled beef and 64,859 MT (PWE) for frozen beef. These low trigger levels reflect the drop in imports during the first quarter of JFY 2004 (April 2004 – June 2004) due to the ban on U.S. beef. Trigger levels are calculated separately for chilled and frozen beef on a quarterly basis, calculated as 117% of the respective import levels during the previous year, and are cumulative for successive quarters (see Table 1). If imports return to "normal" levels in 2005, the safeguard will trigger, increasing the import tariff to 50% from 38.5%. Japan imposed the safeguard in 2003 when imports of chilled beef exceeded the trigger level, causing the tariff to increase to 50% from August 1, 2003 to March 31, 2004 (JFY 2003). Despite protests from Japan's food service and meat industries, as well as major exporters, Japan invoked the safeguard when it triggered.

Table 1. Japanese Beef Safeguard Monitor

JFY 2004 Trigger Levels and Actual Imports					
					Unit: Metric Ton
Chilled Beef	**Trigger Level**	**Cum. Total**	**April**	**May**	**June**
	Quarterly Cum.	**Actual Entry**			
I (Apr. - Jun.)	**85,115**	**52,537**	19,420	13,705	19,412
			July	August	September
I - II (Apr. - Sept.)	**167,279**	**52,537**	0	0	0
			October	November	December
II - III (Apr. - Dec.)	**239,405**	**52,537**	0	0	0
			January	February	March
III - IV (Apr. - Mar.)	**286,156**	**52,537**	0	0	0
Frozen Beef	**Trigger Level**	**Cum. Total**	**April**	**May**	**June**
	Quarterly Cum.	**Actual Entry**			
I (Apr. - Jun.)	**71,254**	**55,435**	22,743	14,788	17,904
			July	August	September
I - II (Apr. - Sept.)	**162,958**	**0**	0	0	0
			October	November	December
II - III (Apr. - Dec.)	**262,823**	**0**	0	0	0
			January	February	March
III - IV (Apr. - Mar.)	**321,812**	**0**	0	0	0
Source: Ministry of Finance (ALIC Monthly)					

2004 Situation Update and Outlook Summary

Due to Japan's ban on U.S. beef, total beef consumption (beef and prepared and processed products) is projected to plunge by 17% to 1.126 million MT in 2004. The lack of imported U.S. beef particularly hurt Japan's beef bowl and barbecue restaurants due to their heavy dependence on specific U.S. cuts, such as short plate and no boneless short rib. Given the lack of alternative supplies, many of these restaurants substituted pork, seafood, lamb and poultry meat, for beef. Household beef consumption in Japan fell in 2004 as consumers switched to pork. (see Table 2).

Prior to Japan's import ban, U.S. beef (mostly grain fed) represented about one-third of Japan's total annual beef consumption, and nearly half of Japan's total beef imports. Due to the ban on U.S. beef, imposed in December 2003, Australia's import share jumped to 90%, while New Zealand captured the remainder. Total imports from Australia and New Zealand are expected to rise by 29% in 2004 to 604,000 [578,000 MT for chilled and frozen beef combined and 26,000 MT for prepared and processed products] (see Tables 4 and 5). Despite the increases, total imports are expected to be about 30% lower from 2003 levels.

Stocks are expected to remain tight through 2004, with the year ending level projected 20% lower at 88,000 MT (see Table 3). Small quantities of U.S. beef were available during the first half of 2004 at relatively high prices, but have been depleted during the summer. Prices for Australian beef, which was used to bridge the supply deficit, particularly in the food service and retails sectors, remained high during the year. The average price for full set/short grain fed (chilled) rose by 30% to 891 yen per kilogram during the first half of the year, while prices for full set/grass fed (chilled) rose by 20% to 748 yen per kilogram. However, Australian supplies of specific cuts (frozen and chilled), which are normally supplied by the U.S., such as short plate and bone-less short rib, were inadequate to meet demand. Prior to the ban, Japanese beef bowl (*gyudon*) and barbeque (*yakiniku*) restaurants were heavily dependant on specific cuts from the U.S. Prices for Australian grass fed trimmings (frozen), which are used in ground beef, rose by 22% to 423 yen per kilogram, reflecting strong demand in Japan's food service and retail sectors.

Domestic beef production is expected to increase slightly to 500,000 MT in 2004, reflecting higher slaughter numbers for Wagyu and dairy breed beef cattle. Market sources report that fattening operators have been finishing cattle several months earlier than normal to take advantage of strong demand and higher prices. Prices for lower grade carcasses (beef and dairy breeds) rose 10-60% during the fist half of the year.

Table 2. Japanese Monthly Household Consumption of Beef, Pork And Chicken

Unit. Grams per Household

	Beef	% Chg.	Pork	% Chg.	Chicken	% Chg.
2003						
July	650	2%	1,353	-1%	895	1%
Aug.	755	12%	1,346	-4%	881	1%
Sept.	614	-3%	1,327	-4%	877	-9%
Oct.	650	5%	1,386	-6%	1,000	-3%
Nov.	628	-6%	1,401	-4%	1,040	-2%
Dec	789	-7%	1,486	-1%	1,299	0%
2004						
Jan.	525	-14%	1,389	6%	850	-7%
Feb.	520	-17%	1,447	11%	794	-14%
Mar.	611	-10%	1,511	9%	776	-19%
Apr.	573	-15%	1,427	3%	862	-10%
May	618	-14%	1,458	5%	939	-4%
Jun.	587	-18%	1,463	8%	884	-2%

Source: Daily Meat and Livestock, Aug. 9 Issue

Table 3. Japanese Monthly Ending Beef Stock Estimates

Unit: Metric Ton (Carcass Equivalent)

	2002	2003	% Chg.	2004	% Chg.
Jan.	193,831	133,924	-31%	92,816	-31%
Feb.	192,626	133,984	-30%	99,883	-25%
Mar.	188,636	138,349	-27%	95,441	-31%
Apr.	177,647	126,871	-29%	88,716	-30%
May	172,891	122,140	-29%	84,867	-31%
Jun.	171,276	115,050	-33%	83,976	-27%
Jul.	161,564	125,347	-22%	0	-100%
Aug.	158,119	114,453	-28%	0	-100%
Sept.	160,770	113,511	-29%	0	-100%
Oct.	146,539	117,189	-20%	0	-100%
Nov.	144,354	119,547	-17%	0	-100%
Dec.	128,636	109,487	-15%	0	-100%

Source: ALIC Monthly Statistics

Table 4. Japanese Beef Imports for January - June 2004

World Trade Atlas
Product Group
BEEF (HS 0201, 0202)
Quantity: Metric Ton

Rank	Country	2002	2003	2004	% Change 04/03
		Jan. - Jun.	Jan. - Jun.	Jan. - Jun.	
0	--World--	211,873	280,477	198,348	-29%
1	Australia	93,210	136,070	179,685	32%
2	New Zealand	5,446	8,596	16,696	94%
3	United States	104,039	128,059	1,276	-99%
4	Chile	-	-	247	n.a.
5	Mexico	6	0	228	105244%
6	Vanuatu	156	288	204	-29%
7	Nicaragua	-	-	13	n.a.
8	Canada	9,010	7,463	-	-100%
9	Costa Rica	0	-	-	n.a.
10	Panama	-	-	-	n.a.
11	Other	5	-	-	n.a.

Source of Data: Japan Customs

Chilled Beef (HS 0201)
Quantity: Metric Ton

Rank	Country	2002	2003	2004	% Change 04/03
		Jan. - Jun.	Jan. - Jun.	Jan. - Jun.	
0	--World--	99,071	138,281	92,495	-33%
1	Australia	58,749	75,795	90,627	20%
2	New Zealand	1,309	1,401	1,794	28%
3	Mexico	0	0	74	n.a.
4	Canada	1,528	2,264	0	-100%
5	United States	37,481	58,821	0	-100%
6	Costa Rica	0	0	0	n.a.
7	Panama	0	0	0	n.a.
8	Anguilla	0	0	0	n.a.
9	Uruguay	0	0	0	n.a.
10	Argentina	0	0	0	n.a.
11	Others	5	0	0	n.a.

Source of Data: Japan Customs

Frozen Beef (HS 0202)
Quantity: Metric Ton

Rank	Country	2002	2003	2003	% Change 04/03
0	--World--	112,801	142,196	105,853	-26%
1	Australia	34,461	60,275	89,058	48%
2	New Zealand	4,137	7,195	14,902	107%
3	United States	66,558	69,239	1,276	-98%
4	Chile	0	0	247	n.a.
5	Vanuatu	156	288	204	-29%
6	Mexico	6	0	154	71213%
7	Nicaragua	0	0	13	n.a.
8	Costa Rica	0	0	0	n.a.
9	Panama	0	0	0	n.a.
10	Netherlands Antilles	0	0	0	n.a.
11	Others	0	0	0	n.a.

Source of Data: Japan Customs

Table 5. Japanese Imports of Prepared and Processed Beef Products
Prepared and Processed Beef
(HS 0210.20 and HS 1602.50)
Quantity: Metric Ton
Period: January - June

Rank	Country	2002	2003	2004	% Change 04/03
		Jan. - Jun.	Jan. - Jun.	Jan. - Jun.	
0	--World--	4,523	5,464	5,199	-5%
1	Australia	872	1,639	3,289	101%
2	China	224	312	703	125%
3	New Zealand	517	582	613	5%
4	Brazil	335	303	519	71%
5	Argentina	37	9	27	207%
6	Thailand	58	53	27	-49%
7	Nicaragua	0	10	13	37%
8	Philippines	4	8	4	-51%
9	Chile	0	0	2	n.a.
10	France	0	0	1	n.a.
11	Others	2,477	2,549	0	-100%

Source of Data: Japan Customs

Prepared and Processed Beef
(HS 0210.20 and HS 1602.50)
Quantity: Metric Ton
Period: January - December

					% Change
Rank	**Country**	**2001**	**2002**	**2003**	**03/02**
		Jan. - Dec.	**Jan. - Dec.**	**Jan. - Dec.**	
0	**--World--**	**20,814**	**8,939**	**15,032**	**68%**
1	United States	13,667	4,155	6,929	67%
2	Australia	2,320	1,994	5,426	172%
3	New Zealand	1,457	1,235	980	-21%
4	Brazil	910	690	773	12%
5	China	1,016	656	705	8%
6	Thailand	168	102	107	5%
7	Argentina	126	57	45	-20%
8	Nicaragua	0	0	24	n.a.
9	Philippines	0	4	16	313%
10	Pakistan	13	2	14	530%
11	Others	1,138	45	11	-75%
Source of Data: Japan Customs					

Pork Section

2005 Market Outlook

Solid Consumption Expected to Reduce Stocks

The continued absence of U.S. beef in Japan is expected to maintain strong demand and high levels of pork imports in 2005. Total imports are projected at 1.196 million MT (1.143 million MT for chilled and frozen pork and 53,000 MT for prepared and processed products), down 2% from 2004, but still higher than 2003 levels. Unusually high carry over stocks of frozen pork from the previous year will likely pressure prices for imported pork. High year-beginning stocks will likely shrink throughout the year due to strong demand.

Stable demand for frozen pork from Denmark and other EU countries for use in Japan's ham and bacon industry is expected to continue in 2005. However, demand generated by Japan's ban on U.S. beef coupled with bans on broiler meat from Thailand and China, is expected to soften in 2005 due to high pork stocks.

Imports from the United States (mainly chilled pork) are expected to remain strong in 2005, with the U.S. import share at around 30%. Solid retail and specialty food service demand (*Tonkatsu* or fried pork cutlet) for high quality chilled pork will support U.S. imports in 2005. Stable demand for seasoned ground pork will likely keep the U.S. share for prepared and processed pork sector at about 60%.

Domestic pork production is projected slightly lower at 1.265 million MT, due largely to smaller sow numbers. In addition, production will be pressured by high imports, domestic environmental constraints, concerns about hog cholera, and uncertain prospects for beef and chicken. However, solid demand for fresh/chilled pork, particularly in the retail sector, will likely sustain higher than normal wholesale prices for domestic pork, boosting profits for Japanese pork producers.

Pork Safeguard Unlikely in 2005

Japan's pork safeguard has been triggered in each of the past four years, subjecting imports to a higher gate price (see Table 6). However, in 2005, the possibility of the safeguard appears to be remote due to an unusually high first quarter trigger level for the 2005 Japan Fiscal Year (April 2005 – March 2006), which is provisionally calculated at 307,301 MT (PWE). This represents the average level of imports during the first quarter (April-June) for the three previous years (2002, 2003, 2004), which is 258,236 MT (PWE) multiplied by 119%. Japan's pork safeguard covers both chilled and frozen pork.

Japan maintains its complex pork differential duty system (a minimum import price system) and the pork safeguard as a part of Uruguay Round agreement. Industry sources say the regular imposition of the safeguard indicates that Japan's pork import system (differential duty and safeguard) creates instability and fosters speculative buying, running counter to the original intention of the system to stabilize pork imports and to maintain an orderly market. Japan's meat industry has been urging the government to change the system, but has yet to call for the elimination of the safeguard. Industry sources anticipate that Japan's pork import regime will be part of WTO agriculture negotiations.

Table 6. Japanese Pork Safeguard Monitor for the Past Three Years

JFY 2002 Trigger Levels and Actual Imports

Unit: Metric Ton

	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	207,038	218,151	94,683	71,682	51,786
			July	August	September
I - II (Apr. - Sept.)	393,487	422,218	114,171	40,853	49,043
			October	November	December
II – III (Apr. - Dec.)	590,281	606,336	58,712	65,320	60,086
			January	February	March
III - IV (Apr. - Mar.)	801,163	751,912	63,715	48,456	33,405

JFY 2003 Trigger Levels and Actual Imports

Unit: Metric Ton

	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	220,706	239,803	102,883	77,341	59,579
			July	August	September
I - II (Apr. - Sept.)	429,414	446,091	120,591	38,176	47,521
			October	November	December
II – III (Apr. - Dec.)	641,268	610,832	58,793	50,865	55,083
			January	February	March
III - IV (Apr. - Mar.)	839,279	783,238	61,203	62,571	48,632

JFY 2004 Trigger Levels and Actual Imports

Unit: Metric Ton

	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	257,004	316,755	133,511	89,735	93,509
			July	August	September
I – II (Apr. - Sept.)	483,275	0	0	0	0
			October	November	December
II - III (Apr. - Dec.)	694,603	0	0	0	0
			January	February	March
III - IV (Apr. - Mar.)	890,399	0	0	0	0

Source: Ministry of Finance and ALIC Monthly

Pork TRQ Under FTA with Mexico Expected to Begin in 2005

The possible implementation of a Free Trade Agreement between Japan and Mexico in 2005 will lead to the establishment of a pork TRQ for Mexico. Japan agreed to start the TRQ at 38,000 MT (PWE), and incrementally increase it to 80,000 MT over five years. The agreement would also cut the tariff to 2.2% from 4.3% for Mexican pork imported at or above the gate price (minimum import price), while all other aspects of the pork differential duty system would remain unchanged. Japan has not yet discussed how the TRQ will impact the pork safeguard. Japan and Mexico are expected to sign the FTA in September 2004, and will reportedly implement the agreement in April 2005.

2004 Situation Update and Outlook Summary

Pork consumption in 2004 is projected to rise by 5 % to 2.494 million MT, reflecting strong alternative demand for U.S. beef and Thai and Chinese broiler meat, which are currently under import restrictions due to BSE and Avian Influenza (see JA4069 Poultry Annual). Many of Japan's restaurants, particularly beef bowl and barbecue chains, along with producers of Japanese lunch boxes (*bento*), developed alternative dishes utilizing pork in the absence of U.S. beef and broiler meat.

Total imports are forecast to rise by 8% to 1.226 million MT, 1.172 million MT for chilled and frozen pork and 54,000 MT for prepared and processed products (see Tables 9 and 10). Imports from the United States are also expected to rise in 2004, maintaining the U.S. import share at around 30%. Imports of U.S. chilled pork are expected to increase 5-7%, bolstered by strong retail and food service demand. Denmark, other EU countries, and Canada are expected to increase frozen pork exports to Japan in 2004. Trade sources report that EU frozen pork from a EU storage program has become more attractive in Japan in light of strong demand.

According to industry data, imports of chilled and frozen pork for January – July 2004 were up 17% at 844,000 MT (590,800 MT PWE). As noted above, high April – June entries (first quarter JFY 2004) caused the safeguard to trigger starting on August 1, 2004. July entries were also relatively high at 148,510 MT (103,000 MT PWE) as the industry rushed to procure supplies before the safeguard started, resulting in a build-up of frozen stocks. June ending stocks are estimated at 315,400 MT (see Table 8), which will likely keep monthly imports after August 2004 relatively low. Year ending stocks are projected at 213,000 MT, a slight increase over the previous year.

Japan's pork production is expected to increase slightly by 1% in 2004 to 1.27 million MT. Despite small sow numbers at the beginning of the year, slaughter numbers rose due to rushed finishing to take advantage of strong retail demand and high prices for fresh/chilled pork in the absence of U.S. beef (see Table 7).

Table 7. Japanese Wholesale Price of Domestic Pork Carcass in Tokyo Market
Quarterly and Annual Averages 2001 – 2004

Unit: Yen per Kilo

Category by Meat Grade

Excellent Grade

Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2001	434	484	506	506	**482**
2002	498	559	510	396	**491**
% chg	15%	16%	1%	-22%	**2%**
2003	413	460	426	397	**424**
% chg	-17%	-18%	-16%	0%	**-14%**
2004	498	487	0	0	**n.a.**
% chg	21%	6%	-58%	-100%	**-31%**

Medium Grade

Year/Month	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Yearly Ave.
2001	395	448	469	476	**447**
2002	459	525	469	355	**452**
% chg	16%	17%	0%	-25%	**1%**
2003	362	408	359	332	**365**
% chg	-21%	-22%	-23%	-7%	**-19%**
2004	438	427	0	0	**n.a.**
% chg	21%	5%	-100%	-100%	**-30%**

Source: ALIC Monthly Statistics (Compiled by Ag. Office, Ag. Office Tokyo)

Table 8. Japanese Monthly Ending Pork Stock Estimates

Unit: Metric Ton (Carcass Equivalent)

Month/Year	2002	2003	% Chg.	2004	% Chg.
Jan.	187,276	210,374	12%	212,876	1%
Feb.	196,929	209,909	7%	209,590	-0%
Mar.	205,100	202,273	-1%	215,531	7%
Apr.	220,861	239,071	8%	259,394	9%
May	226,903	257,789	14%	295,539	15%
Jun.	216,370	252,813	17%	315,399	25%
Jul.	251,339	303,764	21%	0	-100%
Aug.	225,249	272,654	21%	0	-100%
Sept.	209,839	253,967	21%	0	-100%
Oct.	196,200	233,366	19%	0	-100%
Nov.	197,524	221,971	12%	0	-100%
Dec.	190,570	210,947	11%	0	-100%

Source: ALIC Monthly Statistics

Table 9. Japanese Pork Imports for January – June 2004

World Trade Atlas

Product Group

PORK (HS 0203)

Quantity: Metric Ton

Rank	Country	2002	2003	2004	% Change 04/03
		Jan. - Jun.	Jan. – Jun.	Jan. - Jun.	
0	--World--	391,699	383,610	486,936	27%
1	Denmark	115,648	103,346	154,790	50%
2	United States	132,983	133,724	142,589	7%
3	Canada	91,308	88,244	104,307	18%
4	Chile	8,074	12,033	20,555	71%
5	Mexico	19,806	17,381	17,617	1%
6	Hungary	9,385	7,598	10,695	41%
7	France	0	1,277	7,372	477%
8	Netherlands	0	4,967	6,827	37%
9	Austria	2,135	1,439	5,072	252%
10	Australia	5,388	6,267	4,529	-28%
11	Others	6,972	7,334	12,583	72%

Source of Data: Japan Customs

Chilled Pork (HS 0203.11, 0203.12 & 0203.19)

Quantity: Metric Ton

Rank	Country	2002	2003	2004	% Change 04/03
		Jan. - Jun.	Jan. – Jun.	Jan. - Jun.	
0	**--World--**	**100,879**	**87,383**	**97,225**	**11%**
1	United States	67,871	59,408	68,791	16%
2	Canada	21,889	18,545	19,668	6%
3	Mexico	6,416	4,382	5,008	14%
4	Australia	4,559	4,899	3,498	-29%
5	Denmark	140	129	185	43%
6	Korea, South	0	0	30	n.a.
7	Spain	0	6	22	287%
8	Italy	4	0	21	6446%
9	France	0	0	3	n.a.
10	Belgium	0	0	0	n.a.
11	Others	0	14	0	-100%

Source of Data: Japan Customs

Frozen Pork (HS 0203.21, 0203.22 & 0203.29)

Quantity: Metric Ton

Rank	Country	2002	2003	2004	% Change 04/03
		Jan. - Jun.	Jan. - Jun.	Jan. - Jun.	
0	**--World--**	**290,820**	**296,226**	**389,711**	**32%**
1	Denmark	115,508	103,217	154,605	50%
2	Canada	69,419	69,699	84,639	21%
3	United States	65,113	74,316	73,799	-1%
4	Chile	8,074	12,033	20,555	71%
5	Mexico	13,390	12,999	12,609	-3%
6	Hungary	9,385	7,598	10,695	41%
7	France	0	1,277	7,370	477%
8	Netherlands	0	4,967	6,827	37%
9	Austria	2,135	1,439	5,072	252%
10	Ireland	0	3,301	4,401	33%
11	Others	7,796	5,380	9,140	70%

Source of Data: Japan Customs

Table 10. Japanese Imports of Prepared and Processed Pork

World Trade Atlas
Prepared and Processed Pork
(HS 0210.11, HS 0210.12, HS 0210.19, HS 1602.41, & HS 1602.42)
Quantity: Metric Ton
Period: January - June

Rank	Country	2002	2003	2004	% Change 04/03
		Jan. - Jun.	Jan. - Jun.	Jan. - Jun.	
0	**--World--**	**16,064**	**21,009**	**20,401**	**-3%**
1	United States	10,622	13,455	11,910	-11%
2	China	1,395	1,902	3,603	89%
3	Canada	2,950	4,030	3,196	-21%
4	Denmark	75	684	476	-30%
5	Italy	370	393	426	8%
6	Australia	334	410	409	0%
7	Thailand	76	77	133	74%
8	Mexico	92	0	109	n.a.
9	Taiwan	128	53	72	36%
10	Spain	0	0	54	n.a.
11	Others	22	5	12	n.a.
Source of Data: Japan Customs					

Prepared and Processed Pork					
(HS 0210.11, HS 0210.12, HS 0210.19, HS 1602.41, & HS 1602.42)					
Quantity: Metric Ton					
Period: January - December					
Rank	Country	2001	2002	2003	% Change 04/03
		Jan. - Dec.	Jan. - Dec.	Jan. - Dec.	
0	**--World--**	**38,234**	**35,008**	**39,597**	**13%**
1	United States	22,006	22,101	24,329	10%
2	Canada	10,314	7,142	7,350	3%
3	China	2,673	3,357	4,406	31%
4	Denmark	1,300	226	1,225	441%
5	Italy	671	830	959	16%
6	Australia	166	770	839	9%
7	Taiwan	619	295	222	-25%
8	Thailand	52	162	204	26%
9	Germany	3	0	28	n.a.
10	Spain	61	0	23	n.a.
11	Others	369	125	13	-90%
Source of Data: Japan Customs					

Cattle PS&D Table

Japan Animal Numbers, Cattle							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Total Cattle Beg. Stks	4563	4524	4550	4478	4530	4400	(1000 HEAD)
Dairy Cows Beg. Stks	964	964	960	936	0	930	(1000 HEAD)
Beef Cows Beg. Stocks	643	643	640	624	0	620	(1000 HEAD)
Production (Calf Crop)	1430	1438	1400	1415	0	1410	(1000 HEAD)
Intra EC Imports	0	0	0	0	0	0	(1000 HEAD)
Total Imports	23	23	24	20	0	20	(1000 HEAD)
TOTAL Imports	23	23	24	20	0	20	(1000 HEAD)
TOTAL SUPPLY	6016	5985	5974	5913	4530	5830	(1000 HEAD)
Intra EC Exports	0	0	0	0	0	0	(1000 HEAD)
Total Exports	0	0	0	0	0	0	(1000 HEAD)
TOTAL Exports	0	0	0	0	0	0	(1000 HEAD)
Cow Slaughter	545	541	540	550	0	555	(1000 HEAD)
Calf Slaughter	5	8	5	5	0	5	(1000 HEAD)
Other Slaughter	655	657	640	670	0	675	(1000 HEAD)
Total Slaughter	1205	1206	1185	1225	0	1235	(1000 HEAD)
Loss	261	301	259	288	0	295	(1000 HEAD)
Ending Inventories	4550	4478	4530	4400	0	4300	(1000 HEAD)
TOTAL DISTRIBUTION	6016	5985	5974	5913	0	5830	(1000 HEAD)
Calendar Yr. Imp. from U.S.	130	159	130	0	0	0	(HEAD)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(HEAD)

Beef PS&D Table

Japan Meat, Beef and Veal							
	2003	**Revised**	**2004**	**Estimate**	**2005**	**Forecast**	**UOM**
	USDA Official [Old]	**Post Estimate [New]**	**USDA Official [Old]**	**Post Estimate [New]**	**USDA Official [Old]**	**Post Estimate [New]**	
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Slaughter (Reference)	1205	1206	1185	1225	0	1235	(1000 HEAD)
Beginning Stocks	129	129	110	110	80	88	(1000 MT CWE)
Production	495	495	500	500	0	505	(1000 MT CWE)
Intra EC Imports	0	0	0	0	0	0	(1000 MT CWE)
Total Imports	810	850	520	604	0	611	(1000 MT CWE)
TOTAL Imports	810	850	520	604	0	611	(1000 MT CWE)
TOTAL SUPPLY	1434	1474	1130	1214	80	1204	(1000 MT CWE)
Intra EC Exports	0	0	0	0	0	0	(1000 MT CWE)
Total Exports	0	0	0	0	0	0	(1000 MT CWE)
TOTAL Exports	0	0	0	0	0	0	(1000 MT CWE)
Human Dom. Consumption	1324	1364	1050	1126	0	1116	(1000 MT CWE)
Other Use, Losses	0	0	0	0	0	0	(1000 MT CWE)
TOTAL Dom. Consumption	1324	1364	1050	1126	0	1116	(1000 MT CWE)
Ending Stocks	110	110	80	88	0	88	(1000 MT CWE)
TOTAL DISTRIBUTION	1434	1474	1130	1214	0	1204	(1000 MT CWE)
Calendar Yr. Imp. from U.S.	379	394	0	1	0	0	(1000 MT CWE)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT CWE)

Swine PS&D Table

Japan Animal Numbers, Swine							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
TOTAL Beginning Stocks	9725	9725	9720	9724	9720	9500	(1000 HEAD)
Sow Beginning Stocks	929	929	930	918	0	910	(1000 HEAD)
Production (Pig Crop)	17250	17250	17250	17100	0	17000	(1000 HEAD)
Intra EC Imports	0	0	0	0	0	0	(1000 HEAD)
Total Imports	0	0	0	0	0	0	(1000 HEAD)
TOTAL Imports	0	0	0	0	0	0	(1000 HEAD)
TOTAL SUPPLY	26975	26975	26970	26824	9720	26500	(1000 HEAD)
Intra EC Exports	0	0	0	0	0	0	(1000 HEAD)
Total Exports	0	0	0	0	0	0	(1000 HEAD)
TOTAL Exports	0	0	0	0	0	0	(1000 HEAD)
Sow Slaughter	0	0	0	0	0	0	(1000 HEAD)
OTHER SLAUGHTER	16381	16381	16500	16600	0	16350	(1000 HEAD)
Total Slaughter	16381	16381	16500	16600	0	16350	(1000 HEAD)
Loss	874	870	750	724	0	700	(1000 HEAD)
Ending Inventories	9720	9724	9720	9500	0	9450	(1000 HEAD)
TOTAL DISTRIBUTION	26975	26975	26970	26824	0	26500	(1000 HEAD)
Calendar Yr. Imp. from U.S.	77	77	70	40	0	40	(HEAD)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(HEAD)

Pork PS&D Table

Japan Meat, Swine							
	2003	**Revised**	**2004**	**Estimate**	**2005**	**Forecast**	**UOM**
	USDA Official [Old]	**Post Estimate [New]**	**USDA Official [Old]**	**Post Estimate [New]**	**USDA Official [Old]**	**Post Estimate [New]**	
Market Year Begin		01/2003		01/2004		01/2005	MM/YYYY
Slaughter (Reference)	16381	16381	16500	16600	0	16350	(1000 HEAD)
Beginning Stocks	191	191	211	211	191	213	(1000 MT CWE)
Production	1259	1259	1270	1270	0	1265	(1000 MT CWE)
Intra EC Imports	0	0	0	0	0	0	(1000 MT CWE)
Total Imports	1133	1132	1300	1226	0	1196	(1000 MT CWE)
TOTAL Imports	1133	1132	1300	1226	0	1196	(1000 MT CWE)
TOTAL SUPPLY	2583	2582	2781	2707	191	2674	(1000 MT CWE)
Intra EC Exports	0	0	0	0	0	0	(1000 MT CWE)
Total Exports	0	0	0	0	0	0	(1000 MT CWE)
TOTAL Exports	0	0	0	0	0	0	(1000 MT CWE)
Human Dom. Consumption	2372	2371	2590	2494	0	2473	(1000 MT CWE)
Other Use, Losses	0	0	0	0	0	0	(1000 MT CWE)
TOTAL Dom. Consumption	2372	2371	2590	2494	0	2473	(1000 MT CWE)
Ending Stocks	211	211	191	213	0	201	(1000 MT CWE)
TOTAL DISTRIBUTION	2583	2582	2781	2707	0	2674	(1000 MT CWE)
Calendar Yr. Imp. from U.S.	351	384	385	390	0	396	(1000 MT CWE)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT CWE)