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Report Highlights:
Assuming the ban on U.S. beef remains, Japan's beef supply deficit and high market prices are expected to continue in 2005, with consumption and imports dropping slightly. Beef consumption plunged by nearly 15% in 2004 while imports were about 25% lower, reflecting the year-long ban on U.S. beef. Australia's import share climbed to 90% as Japanese companies expanded their grain-fed operations in Australia during the year. Japan's pork market is expected to ease slightly in 2005 following record consumption and import levels in 2004, largely due to the ban on U.S. beef, and bans on broiler meat from China and Thailand. Japan's imports of U.S. pork in 2005 are expected to remain relatively unchanged from the record level (393,000 MT) in 2004.

Includes PSD Changes: Yes
Includes Trade Matrix: No
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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. Post will revise the supply and demand figures 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 discussions of the beef and pork safeguards, customs clearance and product weight equivalent figures are based on the Japanese fiscal year (JFY), which begins in April and ends in March, and are used as reported by the Government of Japan (GOJ). Other discussions are based on the calendar year.

Beef Section

2005 Market Outlook

Assuming Japan maintains its ban on U.S. beef, total 2005 beef consumption, including imported prepared and processed products, is projected at around 1.146 million MT, a 3% decline from 2004. Imports are projected to drop slightly to 640,000 MT, a small drop from 2004. Post expects the supply deficit and high market prices to persist in 2005. Post will revise the 2005 beef and pork PS&D projections as developments warrant.

Japan's Beef Safeguard a Major Concern in 2005

Japan's beef safeguard trigger levels for the first quarter of Japan's Fiscal Year (JFY) 2005 (April – June) are preliminarily calculated at only 61,468 MT (PWE) for chilled beef and 64,859 MT (PWE) for frozen beef. For the first and second quarters of JFY 2005 (April – September), the trigger levels are calculated at only 128,217 MT (PWE) for chilled beef and 141,042 MT (PWE) for frozen beef (see Table 1). These trigger levels reflect substantially lower imports during JFY 2004 due to the ban on U.S. beef.

Trigger levels are calculated separately for chilled and frozen beef on a quarterly basis as 117% of the respective import levels during the previous year, and are cumulative for successive quarters. If imports of U.S. beef were to resume at some point in 2005, total imports would likely exceed the low trigger levels, and would become an immediate concern to both exporters and importers. Once the safeguard is triggered, the beef import tariff jumps to 50% from 38.5 %. In 2003, the safeguard for chilled beef exceeded the trigger level, causing the tariff to increase to 50% from August 1, 2003 to March 31, 2004 (JFY 2003).

Table 1. Japanese Beef Safeguard Monitor

Beef Safeguard Trigger Levels for JFY 2004 and Actual Imports					
Unit: Metric Ton on Customs Clearance Basis (Product Weight)					
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	109,587	20,471	18,546	18,033

			October	November	December
II - III (Apr. - Dec.)	239,405	148,090	17,324	21,179	
			January	February	March
III - IV (Apr. - Mar.)	286,156	148,090			
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	120,549	25,378	22,216	17,520
			October	November	December
II - III (Apr. - Dec.)	262,823	149,971	12,782	16,640	
			January	February	March
III - IV (Apr. - Mar.)	321,812	149,971			
Beef Safeguard Trigger Levels for JFY 2005 and Actual Imports					
	Unit: Metric Ton on Customs Clearance Basis (Product Weight)				
Chilled Beef	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	61,468	0			
			July	August	September
I - II (Apr. - Sept.)	128,217	0			
			October	November	December
II - III (Apr. - Dec.)		0			
			January	February	March
III - IV (Apr. - Mar.)		0			
Frozen Beef	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	64,859	0			
			July	August	September
I - II (Apr. - Sept.)	141,042	0			
			October	November	December
II - III (Apr. - Dec.)		0			
			January	February	March
III – IV (Apr. - Mar.)		0			
Source: Ministry of Finance (ALIC Monthly)					
Note: JFY 2005 1st Qtr - 2nd Qtr trigger levels are calculated on preliminary basis and are					

not yet official.

2004 Situation Summary

Post revisions of cattle and beef PS&D figures for CY 2004 are based on January – November preliminary production, trade and stock data. Total beef consumption (beef and prepared and processed products) is projected to plunge by 14% to 1.178 million MT in 2004 due to the ban on U.S. beef. 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, boneless short rib, and other barbecue items. Japanese barbecue restaurants are also major end users of variety meats such as tongue, skirt meat and offals. 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 specific cuts of grain fed beef) represented about one-third of Japan's total annual beef consumption, and nearly half of Japan's total beef imports. Since the ban on U.S. beef (imposed December 2003), Australia's import share has jumped to 90%, with New Zealand accounting for the remainder. Total imports are projected to fall by 24% to 645,000 MT [617,000 MT of chilled and frozen beef (forecast down 25%) and 26,000 MT of prepared and processed beef (forecast up 4%)].

For January – November 2004, imports of Australia beef increased by 35% while imports from New Zealand jumped by 97%, compared to the same period in 2003. (see Tables 4 and 5). According to trade sources, major Japanese meat packers and trading firms, which have sizable investments in Australian feedlots and meat packing businesses, have been increasing their operations to fill the deficit supply situation. Also, several major Japanese meat companies recently announced plans to increase production of grain fed beef in their Oceania operations, including offering product with a traceability system catering to Japanese retail demand.

Monthly ending stock levels remained tight throughout 2004, with year-ending levels projected 18% lower at 90,000 MT (see Table 3). Small quantities of U.S. beef were available during the first half of 2004 at relatively high prices, but were 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 of representative cuts, for full set/short grain fed (chilled), was 18% higher at 870 yen per kilogram in 2004, while the price for full set/grass fed (chilled) was 13% higher at 736 yen per kilogram (note as of January 31, 2005, 1 USD = 104 Japanese Yen). However, Australian supplies of frozen and chilled specific cuts (predominantly supplied by the U.S. prior to the ban), 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. Some food service chains were compelled to shift to Australian and New Zealand cuts out of desperation. Prices for Australian grass fed trimmings (frozen), which are used in ground beef, rose by 21% to 439 yen per kilogram, reflecting strong demand in Japan's food service and retail sectors.

Domestic beef production is forecast to increase by 3% to 513,000 MT in 2004, reflecting higher slaughter numbers for dairy breed beef cattle, including of F1 cross breeds (Wagyu and Holstein cross). The combination of strong market demand and very high wholesale prices for lower grade carcasses (beef and dairy breeds), which remained 15-60% above the previous year's levels, compelled Japanese producers to liquidate their herds. Auction prices for feeder calves have soared in 2004, further complicating the supply situation.

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

Japanese Monthly Household Consumption of Beef, Pork Chicken, Ham and Sausage						
Unit. Yens, 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%
July	593	-9%	1,403	4%	795	-11%
Aug.	663	-12%	1,443	7%	889	1%
Sept.	535	-13%	1,353	2%	924	6%
Oct.	599	-8%	1,499	8%	1,020	2%
Nov.	555	-12%	1,448	3%	973	-6%
Dec.	0	0%	0	0%	0	0%
Source: Meat and Livestock Daily, Jan. 11 Issue						

Table 3. Japanese Monthly Ending Beef Stock Estimates

Japanese Monthly Ending Beef Stock Estimates					
Unit: Carcass Equivalent MT					
	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%	89,974	-28%
Aug.	158,119	114,453	-28%	95,267	-17%
Sept.	160,770	113,511	-29%	94,473	-17%
Oct.	146,539	117,189	-20%	90,754	-23%
Nov.	144,354	119,547	-17%	91,279	-24%
Dec.	128,636	109,487	-15%		
Source: ALIC Monthly Statistics					

Table 4. Japanese Beef Imports

Chilled and Frozen Combined (HS 0201, 0202)						
Period: January – November, Quantity: Metric Ton						
					% Change	Share
Rank	Country	- MT - 2002	- MT - 2003	- MT - 2004	04/03	04
		Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov
0	--World--	442,129	531,692	388,437	-27%	100%
1	Australia	208,179	261,644	353,734	35%	91%
2	New Zealand	9,404	15,728	31,049	97%	8%
3	Mexico	7	0	1,401	648496%	0%
4	United States	206,412	246,351	1,276	-99%	0%
5	Chile	10	0	556	122441%	0%
6	Others	18,116	7,968	421	-95%	0%
Source of data: Japan Customs, World Trade Atlas (WTA)						

Chilled Beef (HS 0201)						
Period: January – November, Quantity: Metric Ton						
					% Change	Share
Rank	Country	- MT - 2002	- MT - 2003	- MT - 2004	04/03	04
		Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov
0	--World--	207,242	251,389	188,048	-25%	100%
1	Australia	123,742	138,694	184,108	33%	98%
2	New Zealand	2,275	2,568	3,448	34%	2%
3	Mexico	1	0	491	-	0%
4	Canada	3,306	2,264	0	-100%	0%
5	United States	77,884	107,863	0	-100%	0%
6	Others	34	0	0	-	0%
Source of data: Japan Customs, World Trade Atlas (WTA)						

Frozen Beef (HS 0202)

Period: January – November, Quantity: Metric Ton						
					% Change	Share
Rank	Country	- MT - 2002	- MT - 2003	- MT - 2004	04/03	04
		Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov
0	--World--	234,887	280,303	200,389	-29%	100%
1	Australia	84,437	122,950	169,626	38%	85%
2	New Zealand	7,129	13,160	27,601	110%	14%
3	United States	128,529	138,488	1,276	-99%	1%
4	Mexico	6	0	910	421068%	0%
5	Chile	10	0	556	122441%	0%
6	Others	14,776	5,705	421	-93%	0%
Source of data: Japan Customs, World Trade Atlas (WTA)						

Table 5. Japanese Imports of Prepared and Processed Beef Products

Prepared and Processed Beef (HS 0210.20 and HS 1602.50)						
Period: January – November, Quantity: Metric Ton						
					% Change	Share
Rank	Country	- MT - 2002	- MT - 2003	- MT - 2004	04/03	04
		Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov
0	--World--	8,043	13,499	14,339	6%	100%
1	Australia	1,778	4,862	7,652	57%	53%
2	China	527	585	3,388	479%	24%
3	Brazil	662	693	1,693	144%	12%
4	New Zealand	1,094	887	1,047	18%	7%
5	Thailand	98	94	367	290%	3%
6	Others	3,885	6,378	193	-97%	1%
Source of data: Japan Customs, World Trade Atlas (WTA)						

Pork Section

2005 Market Outlook

Solid Consumption Expected to Reduce Stocks

Assuming that Japan maintains its ban on U.S. beef, overall pork demand in 2005 is expected to remain strong resulting in another banner year for pork imports, which are projected at 1.243 million MT (1.172 million MT for chilled and frozen pork and 71,000 MT for prepared and processed products), slightly down from the record level in 2004. Unusually high carry over stocks of frozen pork will likely pressure prices for imported pork. However, Post expects the high year-beginning stocks to shrink during the year. At present, Post does not expect the pork safeguard to trigger for the fifth straight year given the unusually high trigger level (estimated at 307,301 PWE) for the first quarter of Japans next fiscal year (April – June 2005) (see Table 6).

Strong import demand for frozen pork from Denmark and other EU countries for use in the food service industry and in Japan’s ham and bacon industry will be sustained in 2005.

However, alternative import demand generated by Japan's bans on U.S. beef and broiler meat from Thailand and China is expected to soften in 2005 due to high pork stocks. Imports of U.S. chilled pork are expected to remain strong, particularly in the food service industry which has been seeking alternatives to U.S. beef. However, weaker domestic pork prices could cut into retail demand for U.S. (chilled) pork. Post will revise the 2005 Pork PS&D figures as developments warrant.

Domestic pork production is projected slightly lower at 1.26 million MT, due largely to slightly smaller sow numbers anticipated at the start of 2005. In addition, production will be pressured by high imports, domestic environmental constraints, concerns about hog cholera, and uncertain prospects for beef and broiler meat.

Meat Industry Urges Japan to Change Pork Import System

Japan maintains its complex pork differential duty system (minimum import price system also known as the so-called "gate price" system) and the pork safeguard as a part of the 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 maintain an orderly market. Throughout 2004, Japan's meat industry has been urging the Japanese Government to simplify the pork import system. Industry sources anticipate that Japan's pork import regime will be part of WTO agriculture negotiations.

Japan's FTA with Chile May Include Pork

In recent years Japan has negotiated FTAs with Asian and South American Countries. Post expects this trend to continue to in 2005. Japan is reportedly starting negotiations for an FTA with Chile that may include an agreement on pork similar to what Japan allotted Mexico in another FTA that was concluded in 2004 (See next section).

Pork TRQ Under FTA with Mexico to Begin JFY 2005

Japan's FTA with Mexico, which was concluded in 2004, is expected to be implemented in April 2005, the start of Japan's fiscal year. Under this FTA, Japan agreed to establish a TRQ for Mexican pork, starting 38,000 MT (PWE) for the first year, and incrementally increasing to 80,000 MT over five years. The agreement cuts the tariff to 2.2% from 4.3% on pork imported at or above the gate price, while all other aspects of the pork differential duty system remain unchanged. In-quota imports from Mexico will not be counted against Japan's pork safeguard trigger level calculation. Imports under the TRQ will reportedly be monitored by export licenses issued by the Mexican government and import license issued by Japan.

TRQ Schedule for Mexican Pork:

	TRQ	Tariff
JFY 2005	38,000 MT	2.2%
JFY 2006	53,000 MT	2.2%
JFY 2007	65,000 MT	2.2%
JFY 2008	74,000 MT	2.2%
JFY 2009	80,000 MT	2.2%

Table 6. Japanese Pork Safeguard Monitor

Pork Safeguard Trigger Levels for JFY 2002 and Actual Imports					
	Unit: Metric Ton on Customs Clearance Basis (Product Weight)				
	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

Pork Safeguard Trigger Levels for JFY 2003 and Actual Imports					
	Unit: Metric Ton on Customs Clearance Basis (Product Weight)				
	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

Pork Safeguard Trigger Levels for JFY 2004 and Actual Imports					
	Unit: Metric Ton on Customs Clearance Basis (Product Weight)				
	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	518,098	104,608	49,758	46,977
			October	November	December
II - III (Apr. - Dec.)	694,603	629,684	54,492	57,094	0
			January	February	March
III - IV (Apr. - Mar.)	890,399	0	0	0	0

Pork Safeguard Trigger Levels for JFY 2005 and Actual Imports					
Unit: Metric Ton on Customs Clearance Basis (Product Weight)					
	Trigger Level	Cum. Total	April	May	June
	Quarterly Cum.	Actual Entry			
I (Apr. - Jun.)	307,301	0	0	0	0
			July	August	September
I - II (Apr. - Sept.)	549,941	0	0	0	0
			October	November	December
II - III (Apr. - Dec.)		0	0	0	0
			January	February	March
III - IV (Apr. - Mar.)		0	0	0	0
Source: Ministry of Finance (ALIC Monthly)					
JFY 2005 trigger levels for 1st Qtr - 2nd Qtr are calculated on preliminary basis.					

2004 Situation Summary

Post estimates of Japan's swine and pork PS&D figures for CY 2004 are based on January – November 2004 preliminary production, trade and stock data. Pork consumption in 2004 is projected to rise by 7% to 2.532 million MT (includes prepared and processed products). Strong alternative demand due to bans on U.S. beef and broiler meat from Thailand and China helped to boost pork demand in Japan's food service industry, particularly the beef bowl and barbecue restaurant chains, along with producers of Japanese lunch boxes (*bento*). Many beef bowl restaurants, which traditionally relied on U.S. beef, introduced new dishes featuring pork, leading to increased utilization of frozen pork bellies and other cuts as a replacement for U.S. (beef) short plate.

Total pork imports are projected to rise by 12% to 1.264 million MT, a record level, with 1.2 million MT for chilled and frozen pork and 64,000 MT for prepared and processed products (see Tables 9 and 10). Due to strong food service demand for frozen cuts, imports from Denmark jumped in 2004, accounting for a 31% import share. U.S. pork accounted for about 30% of total imports while Canada accounted for 23%. Imports of U.S. chilled pork jumped by 13% (January – November), bolstered by strong retail and food service demand.

Strong import demand led to abnormally high April – June entries (first quarter JFY 2004), causing the pork safeguard to trigger for the fourth consecutive year starting on August 1, 2004. Trade sources attribute the high level of imports to speculation among pork brokers. Japan's meat industry has become increasingly concerned about the large influx of frozen pork, which is projected to result in abnormally high (213,000 MT) year ending frozen stocks (see Table 8).

Japan's pork production is expected to increase slightly by 1% in 2004 to 1.271 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). Average 2004 wholesale hog carcass prices in the Tokyo market were 483 yen per kilogram, up 14% for excellent grade and 428 yen per kilogram, up 17% for medium grade.

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	523	424	483
% Chg.	21%	6%	23%	7%	14%
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	465	381	428
% Chg.	21%	5%	29%	15%	17%
Source: ALIC Monthly Statistics (Compiled by Ag. Office, Ag. Office Tokyo)					

Table 8. Japanese Monthly Ending Pork Stock Estimates

Japanese Monthly Ending Pork Stock Estimates					
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%	334,969	10%
Aug.	225,249	272,654	21%	304,363	12%

Sept.	209,839	253,967	21%	273,546	8%
Oct.	196,200	233,366	19%	244,701	5%
Nov.	197,524	221,971	12%	225,691	2%
Dec.	190,570	210,947	11%		
Source: ALIC Monthly Statistics					

Table 9. Japanese Pork Imports

PORK (HS 0203)						
Period: January – November, Quantity: Metric Ton						
					% Change	Share
Rank	Country	- MT - 2002	- MT - 2003	- MT - 2004	04/03	04
		Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov
0	--World--	717,801	697,836	797,823	14%	100%
1	Denmark	221,735	201,892	244,981	21%	31%
2	United States	229,850	230,857	235,165	2%	29%
3	Canada	164,905	154,407	171,692	11%	22%
4	Chile	20,186	25,765	35,969	40%	5%
5	Mexico	37,354	31,515	30,175	-4%	4%
6	Hungary	15,714	13,223	16,606	26%	2%
7	France	0	5,011	12,070	141%	2%
8	Netherlands	253	9,039	11,542	28%	1%
9	Austria	3,006	2,636	8,907	238%	1%
10	Australia	12,043	11,579	7,913	-32%	1%
11	Others	12,753	11,912	22,802	91%	3%
Source of data: Japan Customs, World Trade Atlas (WTA)						

Chilled Pork (HS 0203.11, 0203.12 & 0203.19)						
Period: January – November, Quantity: Metric Ton						
					% Change	Share
Rank	Country	- MT - 2002	- MT - 2003	- MT - 2004	04/03	04
		Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov
0	--World--	188,059	161,244	177,908	10%	100%
1	United States	125,742	110,979	125,761	13%	71%
2	Canada	40,704	32,680	36,493	12%	21%
3	Mexico	10,956	8,525	8,882	4%	5%
4	Australia	10,366	8,813	6,315	-28%	4%
5	Denmark	280	212	325	53%	0%
6	Korea, South	0	0	67	-	0%
7	Spain	0	16	35	121%	0%
8	Italy	5	4	25	511%	0%
9	France	0	0	5	-	0%
10	Belgium	0	0	0	-	0%
11	Others	6	15	0	-100%	0%

Source of data: Japan Customs, World Trade Atlas (WTA)

Frozen Pork (HS 0203.21, 0203.22 & 0203.29)						
Period: January – November, Quantity: Metric Ton						
					% Change	Share
Rank	Country	- MT - 2002	- MT - 2003	- MT - 2004	04/03	04
		Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov
0	--World--	529,742	536,592	619,915	16%	100%
1	Denmark	221,455	201,680	244,656	21%	39%
2	Canada	124,202	121,726	135,199	11%	22%
3	United States	104,108	119,879	109,404	-9%	18%
4	Chile	20,186	25,765	35,969	40%	6%
5	Mexico	26,398	22,990	21,292	-7%	3%
6	Hungary	15,708	13,223	16,606	26%	3%
7	France	0	5,011	12,065	141%	2%
8	Netherlands	253	9,039	11,542	28%	2%
9	Austria	3,006	2,636	8,907	238%	1%
10	Ireland	677	4,971	7,658	54%	1%
11	Others	13,748	9,673	16,616	72%	3%
Source of data: Japan Customs, World Trade Atlas (WTA)						

Table 10. Japanese Imports of Prepared and Processed Pork Products

Prepared and Processed Pork (HS 0210.11, 0210.12, 0210.19, 1602.41 & 1602.42)						
Period: January – November, Quantity: Metric Ton						
					% Change	Share
Rank	Country	- MT - 2002	- MT - 2003	- MT - 2004	04/03	04
		Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov	Jan/Nov
0	--World--	31,734	36,302	41,629	15%	100%
1	United States	19,857	22,274	22,516	1%	54%
2	Canada	6,730	6,916	7,862	14%	19%
3	China	2,955	3,917	7,705	97%	19%
4	Denmark	139	1,116	1,004	-10%	2%
5	Italy	762	878	868	-1%	2%
6	Others	1,290	1,200	1,674	39%	4%
Source of data: Japan Customs, World Trade Atlas						

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	4524	4524	4478	4478	4400	4420	(1000 HEAD)
Dairy Cows Beg. Stks	964	964	936	936	930	930	(1000 HEAD)
Beef Cows Beg. Stocks	643	643	624	624	620	630	(1000 HEAD)
Production (Calf Crop)	1438	1428	1415	1425	1410	1420	(1000 HEAD)
Intra EC Imports	0	0	0	0	0	0	(1000 HEAD)
Total Imports	23	23	20	22	20	20	(1000 HEAD)
TOTAL Imports	23	23	20	22	20	20	(1000 HEAD)
TOTAL SUPPLY	5985	5975	5913	5925	5830	5860	(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	541	543	550	574	555	560	(1000 HEAD)
Calf Slaughter	8	8	5	10	5	5	(1000 HEAD)
Other Slaughter	657	659	670	681	675	690	(1000 HEAD)
Total Slaughter	1206	1210	1225	1265	1235	1255	(1000 HEAD)
Loss	301	287	288	240	295	235	(1000 HEAD)
Ending Inventories	4478	4478	4400	4420	4300	4370	(1000 HEAD)
TOTAL DISTRIBUTION	5985	5975	5913	5925	5830	5860	(1000 HEAD)
Calendar Yr. Imp. from U.S.	130	159	0	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)	1206	1210	1225	1265	1235	1255	(1000 HEAD)
Beginning Stocks	129	129	110	110	88	90	(1000 MT CWE)
Production	495	496	500	513	505	505	(1000 MT CWE)
Intra EC Imports	0	0	0	0	0	0	(1000 MT CWE)
Total Imports	810	850	604	645	611	640	(1000 MT CWE)
TOTAL Imports	810	850	604	645	611	640	(1000 MT CWE)
TOTAL SUPPLY	1434	1475	1214	1268	1204	1235	(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	1365	1126	1178	1116	1146	(1000 MT CWE)
Other Use, Losses	0	0	0	0	0	0	(1000 MT CWE)
TOTAL Dom. Consumption	1324	1365	1126	1178	1116	1146	(1000 MT CWE)
Ending Stocks	110	110	88	90	88	89	(1000 MT CWE)
TOTAL DISTRIBUTION	1434	1475	1214	1268	1204	1235	(1000 MT CWE)
Calendar Yr. Imp. from U.S.	394	394	1	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	9724	9724	9500	9630	(1000 HEAD)
Sow Beginning Stocks	929	929	918	918	910	915	(1000 HEAD)
Production (Pig Crop)	17250	17250	17100	17230	17000	17220	(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	26824	26954	26500	26850	(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	16396	16600	16548	16350	16450	(1000 HEAD)
Total Slaughter	16381	16396	16600	16548	16350	16450	(1000 HEAD)
Loss	870	855	724	776	700	780	(1000 HEAD)
Ending Inventories	9724	9724	9500	9630	9450	9620	(1000 HEAD)
TOTAL DISTRIBUTION	26975	26975	26824	26954	26500	26850	(1000 HEAD)
Calendar Yr. Imp. from U.S.	77	77	70	120	40	120	(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	16396	16600	16548	16350	16450	(1000 HEAD)
Beginning Stocks	191	191	211	211	213	214	(1000 MT CWE)
Production	1259	1260	1270	1271	1265	1260	(1000 MT CWE)
Intra EC Imports	0	0	0	0	0	0	(1000 MT CWE)
Total Imports	1133	1132	1225	1264	1250	1243	(1000 MT CWE)
TOTAL Imports	1133	1132	1225	1264	1250	1243	(1000 MT CWE)
TOTAL SUPPLY	2583	2583	2706	2746	2728	2717	(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	2372	2493	2532	2548	2531	(1000 MT CWE)
Other Use, Losses	0	0	0	0	0	0	(1000 MT CWE)
TOTAL Dom. Consumption	2372	2372	2493	2532	2548	2531	(1000 MT CWE)
Ending Stocks	211	211	213	214	180	186	(1000 MT CWE)
TOTAL DISTRIBUTION	2583	2583	2706	2746	2728	2717	(1000 MT CWE)
Calendar Yr. Imp. from U.S.	336	384	329	393	393	393	(1000 MT CWE)
Calendar Yr. Exp. to U.S.	0	0	0	0	0	0	(1000 MT CWE)