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Livestock and Products Annual

2013 Situation Update and 2014 Market Outlook

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Report Highlights:
In 2013, Japan’s total beef consumption is expected to rise moderately from the previous year due to increased imports of U.S. beef under the new export program for Japan. This trend is expected to continue into 2014 as it is anticipated that U.S. beef will continue to substitute for Australian beef and will fill projected declines in the domestic beef supply. Japan’s 2014 total pork consumption is projected to be almost the same as 2013, supported by solid retail demand for domestic and imported chilled pork, but this will also be offset by reduced imports of frozen pork cuts.

Executive Summary:

Preface

This report is an update to JA3007 Japan Livestock and Products Semiannual, dated March 1, 2013 (see the link below). In updating and forecasting the demand and supply outlook and forecast numbers for CY 2014, Post assumed that average consumers will remain price conscious and that Japan's imports of U.S. beef will continue under the "LT 30 QSA program", the new beef export program. Post also assumed that pork imports will continue under the Gate Price System, a differential import duty system.

http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Livestock%20and%20Products%20Semi-annual_Tokyo_Japan_3-1-2013.pdf

Quantities listed in the text are made on the basis of Carcass Weight Equivalent (CWE), unless specified otherwise. Some numbers in the tables are on a product weight basis and have not been converted to CWE.

Rates of conversion from product weight to CWE are:

Beef Cuts (Boneless) – 1.40
Pork Cuts (Boneless) – 1.30
Processed/Prepared Beef Products – 1.79
Processed/Prepared Pork Products – 1.30

All supplemental tables in the report are provided for the reader's own analysis.

Executive Summary

The new beef export program for Japan (LT 30 QSA Program), which came into force on February 1, 2013, expanded Japan's imports of U.S. beef for this year, leading to a modestly upward projection for total beef consumption from the previous year. This growth is expected to continue into 2014, with U.S. beef continuing to substitute for Australian beef, as well as fill the supply gap caused by reduced domestic beef output that is forecasted for 2013 and 2014. This strong demand growth for U.S. beef was mainly driven by the food service sector (especially barbecue and beef bowl cuisine) and ready-to-eat food businesses (take-out meals and lunch boxes). However, Post expects that the rate of import growth for U.S. beef in 2014 will slow down amid increased price competition with Australia and projects total consumption growth to be only marginally above the 2013 level. One important note, the potential triggering of the special safeguard (SSG) for frozen beef during the first quarter (Apr. – Jun.) of Japanese Fiscal Year (JFY) 2013 was avoided, which relieved Japanese trade and food industry concerns about a potential import duty hike from 38.5 percent to 50 percent. Post does not expect the

SSG to be triggered for the remainder of the current JFY. The trigger level for next year is based on a calculation of 117 percent of this year's actual imports. Therefore, the JFY first quarter's high volume of imports will help expand the limit for next year, but the overall safeguard remains a challenge.

For pork, Japan's 2014 total consumption is projected to be almost the same as the 2013 level. Solid retail sales of attractively priced imported chilled pork are expected to continue through 2014, which will ensure increased imports of U.S. and Canadian chilled cuts. Meanwhile, limited growth for domestic pork production is projected. Offsetting the above is a reduction in frozen pork imports that is projected for 2013 and 2014. Japanese Customs' continued enhancement of its inspection for stricter compliance with the "Gate Price System" is a major factor that is/will be overshadowing the outlook for frozen raw material pork for processing use through 2014. The top three exporters (United States, Canada, and Denmark) are expected to lose some share in the frozen cuts trade to other EU member countries that have started to make inroads since 2013. Increased competition with U.S. beef (short plate) in the ready-to-eat food businesses (lunch box and takeout meals) is also expected to somewhat lower this specific sector's demand for frozen pork cuts. Increased imports of seasoned ground pork projected for the United States and Canada is expected to partially cover reduced import demand for frozen raw material cuts (especially picnic cut) for sausage making.

Commodities:

Animal Numbers, Cattle
Animal Numbers, Swine
Meat, Beef and Veal
Meat, Swine

Production, Supply and Demand Data Statistics:

Cattle PS&D Table

Meat, Beef and Veal Japan	2012		2013		2014	
	Market Year Begin: Jan 2012		Market Year Begin: Jan 2013		Market Year Begin: Jan 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	1,199	1,199	1,170	1,170		1,145
Beginning Stocks	136	136	136	136		132
Production	519	519	505	505		495
Total Imports	737	738	760	767		781
Total Supply	1,392	1,393	1,401	1,408		1,408
Total Exports	1	1	1	1		1
Human Dom. Consumption	1,255	1,256	1,270	1,275		1,278
Other Use, Losses	0	0	0	0		0
Total Dom. Consumption	1,255	1,256	1,270	1,275		1,278
Ending Stocks	136	136	130	132		129
Total Distribution	1,392	1,393	1,401	1,408		1,408
1000 HEAD, 1000 MT CWE, PERCENT, PEOPLE, KG						

Live Swine PS&D Table

Animal Numbers, Swine Japan	2012		2013		2014	
	Market Year Begin: Jan 2012		Market Year Begin: Jan 2013		Market Year Begin: Jan 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Beginning Stocks	9,735	9,735	9,500	9,685		9,570
Sow Beginning Stocks	900	900	925	900		900
Production (Pig Crop)	17,050	17,300	17,500	17,300		17,300
Total Imports	1	1	1	1		1
Total Supply	26,786	27,036	27,001	26,986		26,871
Total Exports	0	0	0	0		0
Sow Slaughter	0	0	0	0		0
Other Slaughter	16,779	16,776	16,900	16,860		16,860
Total Slaughter	16,779	16,776	16,900	16,860		16,860
Loss	507	575	521	556		501
Ending Inventories	9,500	9,685	9,580	9,570		9,510
Total Distribution	26,786	27,036	27,001	26,986		26,871
1000 HEAD, PERCENT						

Beef and Veal PS&D Table

Meat, Beef and Veal Japan	2012		2013		2014	
	Market Year Begin: Jan 2012		Market Year Begin: Jan 2013		Market Year Begin: Jan 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	1,199	1,199	1,170	1,170		1,145
Beginning Stocks	136	136	136	136		132
Production	519	519	505	505		495
Total Imports	737	738	760	767		781
Total Supply	1,392	1,393	1,401	1,408		1,408
Total Exports	1	1	1	1		1
Human Dom. Consumption	1,255	1,256	1,270	1,275		1,278
Other Use, Losses	0	0	0	0		0
Total Dom. Consumption	1,255	1,256	1,270	1,275		1,278
Ending Stocks	136	136	130	132		129
Total Distribution	1,392	1,393	1,401	1,408		1,408
1000 HEAD, 1000 MT CWE, PERCENT, PEOPLE, KG						

Pork PS&D Table

Meat, Swine Japan	2012		2013		2014	
	Market Year Begin: Jan 2012		Market Year Begin: Jan 2013		Market Year Begin: Jan 2014	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	16,779	16,776	16,900	16,860		16,860
Beginning Stocks	216	216	214	214		204

Production	1,297	1,297	1,305	1,305		1,305
Total Imports	1,259	1,259	1,230	1,241		1,241
Total Supply	2,772	2,772	2,749	2,760		2,750
Total Exports	1	1	1	1		1
Human Dom. Consumption	2,557	2,557	2,533	2,555		2,545
Other Use, Losses	0	0	0	0		0
Total Dom. Consumption	2,557	2,557	2,533	2,555		2,545
Ending Stocks	214	214	215	204		204
Total Distribution	2,772	2,772	2,749	2,760		2,750
1000 HEAD, 1000 MT CWE, PERCENT, PEOPLE, KG						

Author Defined:

Beef:

2014 Beef Market Outlook (New)

- Marginally Higher Total Consumption and Modest Import Growth Projected in 2014

The major market development this year was the start of “LT 30 QSA Program for Japan” in February 2013. Under the new program, Japan began permitting the import of U.S. and Canadian beef from cattle “less than 30 months of age”, compared to the previous limit of “20 months or below”. Supported by solid demand for specific grain fed cuts, the United States was able to use this opportunity to recapture some of the market share that had been lost to Australia over the past decade.

Post took the following factors into account when projecting Japan’s 2014 beef market outlook:

1) Increased demand for U.S. and Australian beef in other Asian markets, including South Korea, China, and ASEAN countries, which will compete with Japanese demand;
2) Relative U.S. and Australian price offers in Japanese and other Asian markets which could affect these exporting countries’ respective shares of Japan’s total beef imports;
3) Constrained U.S. supplies (projected low beef cattle inventory and sustained high feed grain prices), which could keep U.S. export prices relatively high;
4) Forecasted decline in domestic beef production due to reduced numbers of Japanese beef cattle reaching their finishing age; and
5) A possible consumption tax increase from five percent to eight percent that is scheduled to start in April 2014 (to be decided by the 2013 fall Diet session).

Post expects Japan’s solid import demand for U.S. beef to continue into 2014, which will likely replace reduced supplies of domestic beef, as well as Australian beef. However, price offer competition with

Australia, as well as increasing demand in other Asian markets, may slow growth for U.S. beef imports to Japan.

In light of the above, Post projects Japan's 2014 total beef consumption to remain just marginally above its previous year's level of 1.278 million MT and total imports to rise by two percentage points to 781,000 MT (beef cuts: 763,000 MT, up two percentage points; prepared and processed products: 18,000 MT, unchanged). Further expansion for American beef appears to be dependent on increased sales of its chilled cuts in the retail sector, the volume handling capacity of which is relatively large. A competitive U.S. price offer, along with strong promotion campaigns targeting Japan's retail sectors, will likely be a key to more market gains.

The potential triggering of the SSG for frozen beef is a major industry concern for JFY 2013 (Apr. 2013 – Mar. 2014). Given that the trigger level is projected to be higher for the first quarter of JFY 2014 (Apr. – Jun.) at 90,366 (7,033 MT more than the JFY 2013 first quarter), Post does not anticipate the SSG for frozen beef (as well as chilled beef) will be triggered during the first quarter of JFY 2014 at this point in time.

2013 Beef Market Situation Updates and Outlook (Revised)

- Total Beef Consumption and Total Imports to Moderately Increase in 2013

The new LT30 QSA beef export program for Japan, which came into force on February 1, 2013, provided greater market access for U.S. beef and has had a positive effect on Japan's beef market outlook. Japan's imports of U.S. beef this spring have been robust, due to increased demand for affordable grain fed cuts. During the first half of CY 2013, the increase in demand for U.S. beef has been strong in household purchases (see Table 1), as well as the food service sector, especially barbecue, beef bowl, other family restaurant chains, and ready-to- eat food businesses. However, during this same time period, Japan's total beef demand was estimated moderately lower than the same time last year as reduced overall beef sales in the first quarter (Jan. – Mar.) more than offset the growth which started in the second quarter (Apr. – Jun.). On an annual basis, Japan's beef market is expected to sustain the growth that started this spring, supported by expanded U.S. beef imports, which will offset the modest decline anticipated in the domestic beef supply.

In light of the above, Post projects a net increase in Japan's 2013 total beef consumption, up moderately to 1.275 million MT, with total imports up by four percentage points to 767,000 MT (Beef cuts: 749,000 MT, up four percentage points; Prepared and processed products: 18,000 MT, unchanged). Projected growth in U.S. beef imports will likely continue to replace Australian beef coming into Japan.

On a preliminary basis, the U.S. share in Japan's total imports (beef cuts) is projected to rise by four points to 31 percent, with volume up by 25 percentage points (231,000 MT), while the Australian share is expected to fall by six points from the previous year to 56 percent, with volume down by six percentage points. Trade sources predict that Japan's imports of U.S. beef may slow down during the second half amid increased price competition with Australia. Australian price offers have reportedly already started lowering (due to a weaker Australian Dollar against the Japanese yen). Traders expect market demand to remain solid, but are concerned that imports may have exceeded actual demand.

2013 First Half Import Results:

- American Beef Share to Expand in 2013

Following the start of the new import regime in February 2013, the U.S. supply of specific beef cuts for the Japanese market expanded. Looking at monthly import data for the first half of this year, significant increases in U.S. beef imports started in April (following a slight delay needed to allow a transition from the previous import program). Just to illustrate how strong Japanese demand for U.S. beef was, following the start of the new program, Japan's total imports of beef cuts (excluding prepared and processed products) in the first six months were only up slightly over the same period of the previous year at 339,591 MT. However, U.S. beef imports alone surged 32 percentage points over the previous year to 105,909 MT (Chilled cuts: up 27 percentage points; Frozen cuts: up 40 percentage points). Likewise, although Canada is not a major exporter of beef to Japan, Canadian beef imports showed a 47 percentage point surge in the same period (see Tables 7-A, 7-B, 7-C, 7-D and 7-E).

The most popular U.S. cuts were those categorized under "short plate (including several different cuts)", typically used for barbecues, beef bowl, and lunch boxes. Short plate cuts accounted for more than 85 percent of frozen cuts and 42 percent of chilled cuts that were imported from the United States in the first half of this year. This increased supply somewhat reduced the average wholesale price of short plate cuts (see Table 4-B). Other types of U.S. chilled cut imports (loin, chuck, clod, boneless short rib and so on), despite their relatively high price offers, seem to have also gained more demand in the hotel and food service sectors, marking double digit growth. USMEF's timely campaign highlighting the taste and quality of American beef and targeting hotels and restaurant chains serving beef steaks (which typically use high value cuts) helped spread the positive image for U.S. beef among Japanese consumers. Finally, U.S. edible meat and offal (tongue, some skirt meat and hanging tender) also saw strong growth, surging by 71 percentage points to 13,023 MT on customs clearance basis; not included in the PS&D table.

- Australian Beef Imports Continue to Lower in 2013

In sharp contrast, Australian beef declined considerably in the first half of this year, down 12 percentage points to 189,809 MT (Chilled cuts: down five percentage points; Frozen cuts; down 16 percentage points). This decline was partly due to the continued demand shift to American beef and also possibly due to increased exports to other markets, such as China and South Korea, which tightened Australian supply and, in turn, raised price offers to Japan. One other factor that may have attributed to the large decline in Australian frozen cut imports was the threat of the SSG trigger during the first quarter of JFY 2013 (Apr. – Jun.), mainly due to the import surges for U.S. beef. Concerns about the SSG trigger may have led to slower purchases of Australian frozen beef cuts, causing them to plunge 35 percentage points in June compared to the same time last year (see Note 1). Reflecting the SSG concern, frozen beef stocks at the end of June increased 17 percentage points (at 145,328 MT) compared to the same period last year (see Table 6-A). Furthermore, stocks at bonded warehouses awaiting customs clearances reportedly more than doubled and were 15,119 MT (product weight of 10,797 MT) more than the regular monthly average. These stocks began clearing customs in July.

> Note 1: In July 2013, the Ministry of Finance confirmed that frozen beef imports during the JFY first quarter were below the trigger level set for that period, thereby avoiding the SSG being implemented (see Table 3-A). This relieved concerns about Japan's beef market, which otherwise would have faced an import duty hike to 50 percent (the WTO bound duty rate) from the current rate of 38.5 percent for the remainder of this fiscal year starting August 1. Post believes that the risk of the SSG triggering after the current JFY's second quarter (Apr. – Sept.) or third quarter (Apr. – Dec.) is unlikely given seemingly sufficient trigger levels set for each respective cumulative quarter (see Table 3-A).

-Modestly Lower Domestic Beef Output Forecasted in 2013

Japan's cattle slaughter in the first half of 2013 lowered two percentage points compared to the same period of the previous year, mainly due to reduced slaughter of Wagyu and dairy Holstein steers. Total domestic beef output for the same period was also down three percentage points at 240,688 MT (total slaughter of 864,371 head). This modest decline was due to the reduced number of animals born over the past several years reaching their finishing age this year (see Table 4-A). Therefore, Post made no changes to its previous semiannual projections for Japan's 2013 annual total beef output, which was down by three percentage points to 505,000 MT (total slaughter of 1.17 million head). Although monthly average wholesale prices for domestic beef rose across breeds, this high price situation in the wholesale market has not yet been reflected in retail prices, suggesting somewhat resilient demand for high priced beef in the retail sector.

<u>Pork:</u>

2014 Pork Market Outlook (New)

- Total Consumption, Imports, Domestic Output Projected Unchanged in 2013

The major market development in CY 2013 was a substantial reduction in Japan's imports of frozen pork cuts from the top three suppliers, namely the United States, Canada, and Demark. Meanwhile, the trade flow for frozen raw material cuts appears to have been somewhat shifting to other countries, mostly in the EU.

The following factors are taken into account in projecting Japan's 2014 pork market outlook:

1) Increasing imports of U.S. beef;
2) Relative market prices and distribution shares of beef and pork (chilled cuts) in the retail sector;
3) Competition with U.S. frozen cuts in the ready-to-eat food market; and
4) The effect of the Japan Customs' continued enhanced inspection for stricter compliance under the Gate Price System.

For 2014, Post expects Japan's total consumption, domestic output, and import demand for pork will remain near their 2013 levels. Also, U.S. beef imports, at their projected levels of increase, will not affect the demand situation for pork, with the exception that the increased use of U.S. beef (frozen short plates and so on) may partially reduce the use of imported frozen pork in the ready-to-eat food market.

For 2014, Post projects total consumption in Japan's pork market to remain at its 2013 level of 2.545 million MT, with total imports unchanged at 1.241 million MT (pork cuts: 974,000 MT, down slightly, Prepared and processed products: 267,000 MT, up moderately).

2013 Pork Market Situation Outlook (Revised)

- No Major Shift from Pork to Beef in the Retail Sector Anticipated in 2013

During the first half of 2013, in response to moderately higher hog carcass prices due to high feed costs, wholesale market prices of domestic pork cuts started to increase, but average retail prices have remained fairly stable. Based on the above, household purchases of pork (at retail for both domestic and imported cuts) during the first half of this year moderately increased, despite the fact that beef purchases were also up, suggesting that increased beef consumption was not affecting pork retail sales (See Table 1). A possible explanation for this may be because the retail handling volume for imported beef (U.S. beef) is still relatively small compared to pork. U.S. and Canadian chilled pork sales also increased due to solid household demand for value cuts. The sale price for imported chilled pork cuts was typically 15 to 30 percent less compared to domestic fresh and chilled cuts.

Japan's Agriculture & Livestock Industries Corporation (ALIC) estimates that Japan's total pork demand (not including imported prepared and processed pork, seasoned pork, and so on) in the first half of 2013 was moderately lower compared to the same period of the previous year, with most of the decline due to substantially reduced imports of frozen pork cuts for processing and ready-to-eat food business use. As highlighted in the previous semiannual report, since April 2012, frozen pork imports have been subject to Japan Customs' continued enhancement of its inspection to ensure importers are in compliance with the "Gate Price System". Also, the increased availability of frozen beef (U.S. beef) continued to make inroads in the ready-to-eat food market and is starting to affect inexpensive pork used in this sector.

- Total Consumption Forecast for 2013 Unchanged with Increased Domestic Output Offsetting Reduced Imports

On an annual basis, Japan's 2013 pork market is expected to sustain almost the same level of total consumption as the previous year and is projected at 2.555 million MT. Although total imports are projected to be slightly lower at 1.241 million MT (pork cuts: down three percentage points at 981,000 MT; prepared and processed products: up five percentage points to 260,000 MT), this has been offset by the increase in total domestic pork output, projected up slightly at 1.305 million MT for this year.

In 2013, Japan is expected to import less frozen pork cuts from its top three suppliers (the United States, Canada, and Denmark) than the previous year, with trade shifting to products sourced from other EU member countries. Post expects that this situation will continue through the next several years.

Post projects a slight loss in the U.S. share of Japan's pork import market (pork cuts) for 2013, down by two percentage points to 38 percent, with volume down by eight percentage points (at around 377,000 MT). A relatively larger than anticipated decline in import of U.S. frozen cuts is expected to outweigh the moderate increase projected for its chilled cuts. For Canada and Denmark, their market shares for pork imports are expected to be 22 percent (unchanged) and 15 percent (unchanged) respectively. Some of the U.S. share losses should be made up by increased imports of U.S. and Canadian seasoned ground pork (categorized under prepared and processed products) for sausage making.

2013
First Half Import Results:

- Substantial Reduction in Frozen Pork Cuts to Lower Total Pork Imports

Pork cuts imports were down five percentage points compared to the same period of the previous year at 468,250 MT (Chilled cuts: 179,313 MT, up seven percentage points; Frozen cuts: 288,938 MT, down 12 percentage points (see Tables 8-A, 8-B, 8-C, 8-D, and 8-E).
For total chilled cuts, U.S. pork was up five percentage points at 124,426 MT and Canadian pork was also up 15 percentage points at 49,323 MT due to relatively solid retail demand. (U.S. and Canadian chilled loin is the most popular pork item featured in retail and is extensively used by some food service

chains as pork cutlet.) Other chilled cuts such as belly and shoulder have also become more popular in the retail market in recent years.

For frozen cuts, imports from the top three suppliers were down. This was especially true for U.S. and Canadian pork, which suffered a substantial decline, down 37 percentage points at 59,047 MT and down 40 percentage points at 37,469 MT respectively. Danish pork was also down five percentage points at 71,360 MT. This decline for the top three exporters was partially offset by increased imports from Mexico (up 33 percentage points), Chile (up nine percentage points), and other EU countries (up 27 percentage points). Post expects this decline in frozen cut imports for the top three exporters to lessen in the second half of 2013 as processors are expected to start building stocks for year end sale.

Imports of prepared and processed products were up, largely due to increases from the United States and Canada of "seasoned ground pork", an alternative raw material (picnic cut) for sausage making.

- 2013 Domestic Pork Output to Rise Slightly

Domestic hog slaughter in the first half of 2013 was up only slightly (less than half a percentage point) compared to the same period of the previous year at 8.926 million head (with the corresponding national output at 646,488 MT). According to the national livestock inventory data, national sow numbers at the beginning of 2013 were unchanged at 899,700 head, lower than Post's earlier projection. MAFF is forecasting a modest rise (two to three percentage points) in the national hog slaughter for the second half of 2013. As high temperatures during summer 2013 are affecting Western and Southern Japan, the anticipated output growth in some major hog producing prefectures in the Kyushu region (Kagoshima and Miyazaki) may lower in coming months. Given the above, Post forecasts 2013 annual domestic output growth up only slightly from its 2012 level at 1.305 million MT (or 1.686 million head).

Supplemental Tables:

Table 1: Average Monthly Expenditures and Quantities of Selected Commodities Purchased per Household (two or more person household) Year to Date (YTD)

	Beef				Pork				Chicken			
	Expenditure (JP Yen)		Quantity (gram)		Expenditure (JP Yen)		Quantity (gram)		Expenditure (JP Yen)		Quantity (gram)	
CY 2009	**20,166**		**7,045**		**24,790**		**18,639**		**12,614**		**13,649**	
CY 2010	**18,965**		**6,933**		**23,959**		**18,501**		**12,387**		**13,755**	
% Chg.	**-6%**		**-2%**		**-3%**		**-1%**		**-2%**		**1%**	
CY 2011	**18,597**		**6,782**		**24,740**		**18,989**		**12,802**		**13,705**	
% Chg.	**-2%**		**-2%**		**3%**		**3%**		**3%**		**0%**	
CY 2012	**18,173**		**6,765**		**23,771**		**18,770**		**12,769**		**14,614**	
% Chg.	**-2%**		**0%**		**-4%**		**-1%**		**0%**		**7%**	
	Beef				**Pork**				**Chicken**			
CY 2013	**Expenditure**		**Quantity**		**Expenditure**		**Quantity**		**Expenditure**		**Quantity**	
Jan.	1,581	8%	600	8%	2,015	-1%	1,600	-1%	1,077	-5%	1,230	-2%
Feb.	1,378	3%	527	0%	1,959	-2%	1,551	-1%	1,028	-6%	1,215	-3%

Mar.	1,616	10%	554	-7%	2,113	6%	1,691	5%	1,082	-2%	1,262	-1%
Apr.	1,563	10%	563	3%	2,084	8%	1,653	9%	1,077	1%	1,244	2%
May	1,604	7%	617	4%	2,020	5%	1,597	6%	1,074	3%	1,236	4%
Jun.	1,581	13%	598	10%	2,022	7%	1,616	7%	1,055	7%	1,318	14%
CY 2012 (Jan. - Jun.)	**8,577**		**3,359**		**11,789**		**9,325**		**6,432**		**7,325**	
CY 2013 (Jan. - Jun.)	**9,323**		**3,459**		**12,213**		**9,708**		**6,393**		**7,505**	
% Chg.	**9%**		**3%**		**4%**		**4%**		**-1%**		**2%**	

Source: Ministry of Internal Affairs and Communication Bureau

	Ground Meat				**Ham**				**Sausage**			
	Expenditure (JP Yen)		**Quantity (gram)**		**Expenditure (JP Yen)**		**Quantity (gram)**		**Expenditure (JP Yen)**		**Quantity (gram)**	
CY 2009	**2,045**		**1,888**		**5,670**		**2,947**		**7,197**		**5,324**	
CY 2010	**1,932**		**1,853**		**5,618**		**2,993**		**7,067**		**5,434**	
% Chg.	**-6%**		**-2%**		**-1%**		**2%**		**-2%**		**2%**	
CY 2011	**1,982**		**1,892**		**5,634**		**3,025**		**7,099**		**5,400**	
% Chg.	**3%**		**2%**		**0%**		**1%**		**0%**		**-1%**	
CY 2012	**1,920**		**1,860**		**5,626**		**3,059**		**7,076**		**5,466**	
% Chg.	**-3%**		**-2%**		**0%**		**1%**		**0%**		**1%**	
CY 2013	**Ground Meat**				**Ham**				**Sausage**			
	Expenditure		**Quantity**		**Expenditure**		**Quantity**		**Expenditure**		**Quantity**	
Jan.	153	-3%	152	-1%	326	-2%	182	1%	539	0%	414	-2%
Feb.	147	1%	151	2%	303	-1%	172	-1%	542	-2%	428	-2%
Mar.	165	-4%	160	-6%	352	-1%	197	-2%	579	-4%	460	-1%
Apr.	168	4%	158	3%	368	1%	207	0%	608	1%	469	1%
May	168	-1%	152	-3%	404	1%	225	0%	636	1%	505	4%
Jun.	185	9%	175	10%	514	11%	284	16%	605	5%	480	6%
CY 2012 (Jan. - Jun.)	**974**		**941**		**2,222**		**1,233**		**3,502**		**2,724**	
CY 2013 (Jan. - Jun.)	**986**		**948**		**2,267**		**1,267**		**3,509**		**2,756**	
% Chg.	**1%**		**1%**		**2%**		**3%**		**0%**		**1%**	

Source: Ministry of Internal Affairs and Communication Bureau

	Bacon				**Yakitori**				**Cutlet**			
	Expenditure (JP Yen)		**Quantity (gram)**		**Expenditure (JP Yen)**		**Quantity (gram)**		**Expenditure (JP Yen)**		**Quantity (gram)**	
CY 2009	**2,391**		**1,379**									
CY 2010	**2,275**		**1,380**									
CY 2011	**2,429**		**1,489**		**1,896**				**1,000**			
% Chg.	**7%**		**8%**									
CY 2012	**2,398**		**1,470**		**1,952**				**1,019**			
% Chg.	**-1%**		**-1%**		**3%**				**2%**			
	Bacon				**Yakitori**				**Cutlet**			
CY 2013	**Expenditure**		**Quantity**		**Expenditure**		**Quantity**		**Expenditure**		**Quantity**	
Jan.	173	-8%	106	-6%	140	8%			126	2%		
Feb.	191	-2%	120	4%	120	-5%			118	-1%		
Mar.	221	8%	142	20%	160	1%			134	-12%		
Apr.	219	6%	133	2%	159	-5%			122	-5%		

May	216	-3%	137	0%	165	2%			143	2%		
Jun.	212	5%	133	3%	171	1%			146	10%		
CY 2012 (Jan. - Jun.)	**1,218**		**742**		**915**				**797**			
CY 2013 (Jan. - Jun.)	**1,232**		**771**		**915**				**789**			
% Chg.	**1%**		**4%**		**0%**				**-1%**			

Source: Ministry of Internal Affairs and Communication Bureau

Table 2: Australian Beef Exports to Japan

Unit: Metric Ton (Shipped Weight Basis)								
	Calendar Year (Jan. – Dec.)					**Year to Date (Jan. – Jul.)**		
	2010	2011	2012	% Chg. (2012/2011)	2012 Share	2012	2013	% Chg.
Chilled Beef	**155,536**	**138,408**	**129,229**	**-7%**	**100%**	**74,851**	**68,213**	**-9%**
Grass	51,775	45,558	43,510	-4%	34%	24,764	23,459	-5%
Grain fed	103,761	92,850	85,720	-8%	66%	50,087	44,754	-11%
Frozen Beef	**200,675**	**203,778**	**179,310**	**-12%**	**100%**	**107,047**	**104,658**	**-2%**
Grass	150,074	155,172	140,929	-9%	79%	84,922	80,759	-5%
Grain fed	50,601	48,606	38,381	-21%	21%	22,125	23,899	8%
TOTAL	**356,211**	**342,186**	**308,540**	**-10%**	**100%**	**181,898**	**172,871**	**-5%**
Grass	201,850	200,731	184,439	-8%	60%	109,685	104,218	-5%
Grain fed	154,362	141,456	124,101	-12%	40%	72,212	68,653	-5%

Source: Meat Livestock Australia (Compiled by post)

Table 3-A: Beef Safeguard Monitor YTD

Beef Safeguard Trigger Levels for JFY 2012 and Actual Imports (H24) Year to Date					
Unit: Metric Ton (Customs Clearance Basis as announced by Ministry of Finance)					
Chilled Beef	**Trigger Level**	**Cum. Total**			
	Quarterly Cum.	**Actual Entry**	April	May	June
I (Apr. - Jun.)	**74,339**	53,797	16,874	18,970	17,953
			July	August	September
I - II (Apr. - Sept.)	**152,456**	113,048	20,961	20,886	17,404
			October	November	December
II - III (Apr. - Dec.)	**230,642**	165,569	17,835	18,656	16,030
			January	February	March
III - IV (Apr. - Mar.)	**292,355**	**210,837**	13,837	14,007	17,424
Frozen Beef	**Trigger Level**	**Cum. Total**			
	Quarterly Cum.	**Actual Entry**	April	May	June
I (Apr. - Jun.)	**79,758**	71,168	20,261	23,082	27,825
			July	August	September
I - II (Apr. - Sept.)	**178,189**	157,905	28,496	34,747	23,494
			October	November	December
II - III (Apr. - Dec.)	**271,266**	226,006	27,572	20,657	19,872
			January	February	March
III - IV (Apr. - Mar.)	**351,192**	**285,743**	20,381	16,511	22,845

Source: Ministry of Finance

Beef Safeguard Trigger Levels for JFY 2013 and Actual Imports (H25) Year to Date					
Unit: Metric Ton (Customs Clearance Basis as announced by Ministry of Finance)					
Chilled Beef	**Trigger Level**	**Cum. Total**			
	Quarterly Cum.	**Actual Entry**	**April**	**May**	**June**
I (Apr. - Jun.)	**74,339**	59,082	20,856	22,561	15,665
			July	August	September

I - II (Apr. - Sept.)	**152,456**				
			October	November	December
II - III (Apr. - Dec.)	**230,642**				
			January	February	March
III - IV (Apr. - Mar.)	**292,355**				
Frozen Beef	**Trigger Level**	**Cum. Total**			
	Quarterly Cum.	**Actual Entry**	**April**	**May**	**June**
I (Apr. - Jun.)	**83,267**	**77,236**	24,829	32,547	**19,860**
			July	**August**	**September**
I - II (Apr. - Sept.)	**184,749**				
			October	November	December
II - III (Apr. - Dec.)	**264,428**				
			January	February	March
III - IV (Apr. - Mar.)	**334,320**				

Source: Ministry of Finance

JFY 2014 First Quarter Trigger (Preliminary – Calculated by Post):
- Chilled beef: 74,334 MT unchanged from JFY 2013 (59,082*1.17 = 69,126 MT, lower than the 2002-2003 average)
- Frozen beef: 90,366 MT (77,236 * 1.17 = 90,366 MT – 7,099 MT higher compared to JFY 2013 trigger level).

Table 3-B: Pork Safeguard Monitor Table YTD

Pork Safeguard Trigger Levels for JFY 2010 and Actual Imports Year to Date (S22)

Unit: Metric Ton (Customs Clearance Basis as announced by Ministry of Finance)

	Trigger Level	**Cum. Total**			
	Quarterly Cum.	**Actual Entry**	**April**	**May**	**June**
I (Apr. - Jun.)	**224,488**	**198,319**	66,192	60,274	71,853
			July	August	September
I - II (Apr. - Sept.)	**434,398**	**376,577**	65,680	61,408	51,170
			October	November	December
I - III (Apr. - Dec.)	**645,081**	**539,862**	51,964	55,805	55,516
			January	February	March
I - IV (Apr. - Mar.)	**839,812**	**714,658**	53,936	58,265	62,595

Source: Ministry of Finance

Pork Safeguard Trigger Levels for JFY 2011 and Actual Imports Year to Date (S23)

Unit: Metric Ton (Customs Clearance Basis as announced by Ministry of Finance)

	Trigger Level	**Cum. Total**			
	Quarterly Cum.	**Actual Entry**	April	May	June
I (Apr. - Jun.)	**228,878**	**192,076**	67,802	59,008	65,266
			July	August	September
I - II (Apr. - Sept.)	**437,636**	**361,225**	55,510	58,436	55,203
			October	November	December
I - III (Apr. - Dec.)	**641,388**	**557,778**	63,395	71,001	62,157
			January	February	March
I - IV (Apr. - Mar.)	**838,343**	**740,135**	62,783	58,693	60,881

Source: Ministry of Finance

Pork Safeguard Trigger Levels for JFY 2012 and Actual Imports Year to Date (S24)

Unit: Metric Ton (Customs Clearance Basis as announced by Ministry of Finance)

	Trigger Level	**Cum. Total**			

	Quarterly Cum.	Actual Entry	April	May	June
I (Apr. - Jun.)	**223,444**	**170,045**	50,349	67,679	52,017
			July	August	September
I - II (Apr. - Sept.)	**421,554**	**356,083**	61,010	67,357	57,671
			October	November	December
I - III (Apr. - Dec.)	**625,909**	**535,146**	67,143	58,093	53,827
			January	February	March
I - IV (Apr. - Mar.)	**830,504**	**699,124**	57,494	53,035	53,449

Source: Ministry of Finance

Pork Safeguard Trigger Levels for JFY 2013 and Actual Imports Year to Date (S25)

Unit: Metric Ton (Customs Clearance Basis as announced by Ministry of Finance)

	Trigger Level	Cum. Total			
	Quarterly Cum.	**Actual Entry**	April	May	June
I (Apr. - Jun.)	**222,289**	**163,620**	58,545	58,931	46,144
			July	August	September
I - II (Apr. - Sept.)	**433,889**		0	0	0
			October	November	December
I - III (Apr. - Dec.)	**647,653**		0	0	0
			January	February	March
I - IV (Apr. - Mar.)	**854,366**		0	0	0

Source: Ministry of Finance

Table 4-A: Average Wholesale Price of Domestic Beef, Medium Grade Carcasses by Breed, Tokyo Market YTD

				Unit: JP Yen per Kg.	
WAGYU STEER A-3 GRADE					
	1st Qtr.	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Average**
2011	1,530	1,437	1,197	1,152	**1,329**
2012	1,292	1,440	1,431	1,619	**1,446**
%chg	-16%	0%	20%	40%	**9%**
2013	1,608	1,731			**1,669**
%chg	24%	20%			**15%**
WAGYU STEER A-2 GRADE					
2011	1,362	1,256	900	828	**1,087**
2012	1,042	1,257	1,255	1,446	**1,250**
%chg	-23%	0%	39%	75%	**15%**
2013	1,453	1,585			**1,519**
%chg	39%	26%			**21%**
Holstein Steer B-2 Grade					
2011	652	645	493	362	**497**
2012	380	590	591	661	**555**
%chg	-42%	-8%	20%	83%	**12%**
2013	716	770			**743**
%chg	89%	30%			**34%**
Holstein Cow C-2 GRADE					
2011	394	439	357	183	**344**
2012	232	366	349	316	**316**
%chg	-41%	-17%	-2%	73%	**-8%**
2013	378	488			**433**
%chg	63%	33%			**37%**
F1 Cross Breed Steer B-3 GRADE					
2011	1,202	1,176	1,040	864	**1,075**
2012	931	1,068	1,089	1,157	**1,061**
%chg	-22%	-9%	5%	34%	**-1%**
2013	1,116	1,208			**1,162**

%chg	20%	13%			**10%**
F1 Cross Breed Steer B-2 GRADE					
2011	1,112	1,073	857	623	**916**
2012	747	960	964	1,026	**924**
%chg	-33%	-11%	13%	65%	**1%**
2013	1,000	1,103			**1,051**
%chg	34%	15%			**14%**

Source: ALIC Livestock Monthly Statistics
Note: 2013 average is for Jan. - Jun.

Table 4-B: Average Wholesale Price of Imported Beef by Cuts and Origin, Chilled Cuts YTD

					Unit: JP Yen per Kg.
Full Set, Aussie Beef, Chilled, (Short Grain Fed)					
	1st Qtr.	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Average**
2011	842	803	758	772	**794**
2012	797	863	813	814	**822**
%chg	-5%	8%	7%	5%	**4%**
2013	923	956			**940**
%chg	16%	11%			**14%**
Full Set, Aussie Beef, Chilled, (Grass Fed)					
2011	767	703	669	687	**707**
2012	728	772	698	716	**729**
%chg	-5%	10%	4%	4%	**3%**
2013	800	849			**824**
%chg	10%	10%			**13%**
Navel-end Brisket, Aussie Beef, Chilled					
2011	586	552	532	513	**546**
2012	539	607	617	584	**587**
%chg	-8%	10%	16%	14%	**7%**
2013	636	637			**637**
%chg	18%	5%			**8%**
Strip Loin, Aussie Beef, Chilled					
2011	1,148	1,008	940	945	**1,010**
2012	1,167	1,177	950	990	**1,071**
%chg	2%	17%	1%	5%	**6%**
2013	1,234	1,320			**1,277**
%chg	6%	12%			**19%**
Chuck Rib, US Beef, Chilled					
2011	1,087	1,111	1,049	1,024	**1,068**
2012	1,133	1,276	1,206	1,160	**1,194**
%chg	4%	15%	15%	13%	**12%**
2013	1,389	1,596			**1,492**
%chg	23%	25%			25%
Chuck Eye, US Beef, Chilled					
2011	814	739	697	799	**762**
2012	788	772	747	840	**786**
%chg	-3%	4%	7%	5%	**3%**
2013	891	904			**898**
%chg	13%	17%			14%
Strip Loin, US Beef, Chilled					
2011	n.a.	1,559	1,482	1,303	**1,086**
2012	1,501	1,738	1,798	1,637	**1,668**
%chg	n.a.	11%	21%	26%	**54%**
2013	1,819	2,099			**1,959**

%chg	21%	21%			17%
Rib Eye Roll, US Beef, Chilled					
2011	n.a.	1,676	1,640	1,801	**1,279**
2012	1,761	1,833	1,828	2,011	**1,858**
%chg	n.a.	9%	11%	12%	**45%**
2013	2,099	2,141			**2,120**
%chg	19%	17%			14%

Source: ALIC Livestock Monthly Statistics

Note: 2013 average is for Jan. - Jun.

Table 4-C: Average Wholesale Price of Imported Beef by Cuts and Origin, Frozen Cuts YTD

					Unit: JP Yen per Kg.
Chuck & Blade, Aussie Beef, Frozen					
	1st Qtr.	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Average**
2011	583	582	558	546	**567**
2012	543	572	562	567	**561**
%chg	-7%	-2%	1%	4%	**-1%**
2013	618	674			**646**
%chg	14%	18%			15%
Top Side, Aussie Beef, Frozen					
	1st Qtr.	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Average**
2011	662	633	610	613	**629**
2012	636	642	613	608	**625**
%chg	-4%	1%	1%	-1%	**-1%**
2013	672	787			**730**
%chg	6%	23%			17%
Trimming, Aussie Beef, Frozen					
	1st Qtr.	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Average**
2011	493	478	449	440	**465**
2012	452	464	301	448	**416**
%chg	-8%	-3%	-33%	2%	**-11%**
2013	520	559			**539**
%chg	15%	20%			30%
Short Plate, US Beef, Frozen					
	1st Qtr.	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Average**
2011	n.a.	511	504	535	**387**
2012	687	888	738	659	**743**
%chg	n.a.	74%	46%	23%	92%
2013	611	577			**594**
%chg	-11%	-35%			-20%
Short Rib, US Beef, Frozen					
	1st Qtr.	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Average**
2011	n.a.	1,676	1,640	1,801	**1,279**
2012	1,766	1,836	1,660	1,616	**1,719**
%chg	n.a.	10%	1%	-10%	**34%**
2013	1,928	2,297			**2,113**
%chg	9%	25%			23%
Chuck Rib, US Beef, Frozen					
	1st Qtr.	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Average**
2011	n.a.	904	842	853	**650**
2012	916	1,402	1,136	1,020	**1,118**
%chg	n.a.	55%	35%	20%	**72%**
2013	1,215	1,440			**1,328**
%chg	33%	3%			19%

Source: ALIC Livestock Monthly Statistics

Note: 2013 average is for Jan. - Jun.

Table 5-A: Average Wholesale Price of Domestic Pork Carcasses by Grade, Tokyo Market YTD

					Unit: JP Yen per Kg.
Excellent Grade					
	1st Qtr.	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Average**
2011	466	506	493	411	**469**
2012	422	478	475	408	**446**
% Chg	-9%	-6%	-4%	-1%	**-5%**
2013	419	496			**458**
% Chg	-1%	4%			3%
Medium Grade					
2011	425	475	455	375	**433**
2012	381	430	434	369	**404**
% Chg	-10%	-10%	-5%	-2%	-7%
2013	370	459			**415**
% Chg	-3%	7%			3%

Source: MAFF Meat Statistics, ALIC Monthly Statistics
Note: 2013 average is for Jan. - Jun.

Table 5-B: Average Wholesale Price of Domestic Pork by Cuts, Fresh/Chilled YTD

					Unit: JP Yen per Kg.
Full set					
	1st Qtr.	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Average**
2011	685	729	704	586	**676**
2012	598	664	670	576	**627**
%chg	-13%	-9%	-5%	-2%	**-7%**
2013	584	700			**642**
%chg	-2%	5%			2%
Picnic					
2011	498	550	525	446	**505**
2012	439	477	476	414	**451**
%chg	-12%	-13%	-9%	-7%	**-11%**
2013	425	536			**481**
%chg	-3%	12%			6%
Shoulder Loin					
2011	874	875	874	779	**851**
2012	768	814	840	792	**803**
%chg	-12%	-7%	-4%	2%	**-6%**
2013	775	856			**815**
%chg	1%	5%			1%
Loin					
2011	917	915	925	810	**892**
2012	798	853	871	805	**832**
%chg	-13%	-7%	-6%	-1%	**-7%**
2013	796	877			**837**
%chg	-0%	3%	-100%	-100%	1%
Tender Loin					
2011	963	996	991	886	**959**
2012	865	926	925	860	**894**
%chg	-10%	-7%	-7%	-3%	**-7%**
2013	852	961			**907**
%chg	-1%	4%			1%
Belly					

2011	878	868	817	754	**829**
2012	763	765	758	771	**764**
%chg	-13%	-12%	-7%	2%	**-8%**
2013	763	806			**785**
%chg	0%	5%			3%
Ham					
2011	516	569	550	467	**526**
2012	457	508	503	436	**476**
%chg	-11%	-11%	-8%	-7%	**-9%**
2013	451	571			**511**
%chg	-1%	12%			7%

Source: MAFF Meat Statistics, ALIC Monthly Statistics
Note: 2013 average is for Jan. - Jun.

Table 5-C: Average Wholesale Price of Imported Chilled Pork Cuts YTD

					Unit: JP Yen per Kg.
Loin, US:					
	1st Qtr.	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Average**
2011	601	597	596	584	**595**
%chg	-2%	0%	-1%	-3%	**-1%**
2012	601	595	601	595	**598**
%chg	0%	-0%	1%	2%	**1%**
2013	589	589			**589**
%chg	-2%	-1%			-2%
Loin, Canada:					
2011	620	618	619	600	**614**
2012	617	611	609	602	**610**
%chg	-0%	-1%	-2%	0%	**-1%**
2013	599	601			**600**
%chg	-3%	-2%			-2%
Tender Loin, US:					
2011	689	692	690	689	**690**
2012	687	685	686	679	**684**
%chg	-0%	-1%	-1%	-1%	**-1%**
2013	681	687			**684**
%chg	-1%	0%			-0%
Tender Loin, Canada:					
2011	781	774	771	763	**772**
2012	762	736	730	717	**736**
%chg	-2%	-5%	-5%	-6%	**-5%**
2013	727	727			**727**
%chg	-5%	-1%			-1%
Shoulder Loin, US:					
2011	619	632	630	608	**622**
2012	614	604	608	612	**609**
%chg	-1%	-5%	-3%	1%	**-2%**
2013	598	605			**601**
%chg	-3%	0%			-1%
shoulder Loin, Canada:					
2011	642	654	654	633	**646**
2012	635	628	631	636	**632**
%chg	-1%	-4%	-4%	0%	**-2%**
2013	618	625			**622**

%chg	-3%	-1%			-2%

Source: MAFF Meat Statistics, ALIC Monthly Statistics
Note: 2013 average is for Jan. - Jun.

Table 6-A: Monthly Ending Stock of Beef YTD

Unit: Metric Ton (Carcass Weight Equivalent)

	2010	2011	% Chg.	2012	% Chg.	2013	% Chg.
Jan.	109,507	121,460	11%	129,254	6%	128,838	-0%
Feb.	101,847	115,384	13%	121,915	6%	120,344	-1%
Mar.	96,699	120,288	24%	111,626	-7%	119,699	7%
Apr.	99,306	114,618	15%	107,579	-6%	117,029	9%
May	102,899	117,349	14%	112,944	-4%	135,064	20%
Jun.	108,482	128,628	19%	124,592	-3%	145,328	17%
Jul.	114,444	136,346	19%	139,138	2%		
Aug.	124,660	139,075	12%	148,562	7%		
Sept..	128,486	134,746	5%	154,256	14%		
Oct.	124,109	131,445	6%	152,671	16%		
Nov.	128,394	135,610	6%	149,373	10%		
Dec.	128,677	136,006	6%	135,492	-0%		

Source: ALIC Monthly Statistics

Table 6-B: Monthly Ending Stock of Pork YTD

Unit: Metric Ton (Carcass Weight Equivalent)

Month/Year	2010	2011	% Chg.	2012	% Chg.	2013	% Chg.
Jan.	222,352	221,793	-0%	232,219	5%	227,915	-2%
Feb.	218,429	229,346	5%	238,564	4%	229,814	-4%
Mar.	223,313	226,091	1%	237,673	5%	226,928	-5%
Apr.	227,208	225,358	-1%	231,592	3%	226,129	-2%
May	240,895	233,488	-3%	234,878	1%	231,345	-2%
Jun.	261,197	235,265	-10%	219,436	-7%	224,888	2%
Jul.	269,677	228,322	-15%	222,686	-2%		
Aug.	270,292	219,876	-19%	228,799	4%		
Sept..	258,098	210,201	-19%	233,068	11%		
Oct.	242,017	210,187	-13%	234,993	12%		
Nov.	227,482	219,132	-4%	229,995	5%		
Dec.	218,404	215,833	-1%	213,918	-1%		

Source: ALIC Monthly Statistics

Table 7-A: Japanese 2013 Total Beef Imports, Chilled and Frozen Cuts Combined/CIF Price YTD

Unit: Metric Ton (Customs Clearance Basis)

Partner Country	Calendar Year (Jan. – Dec.)					Year To Date (Jan. – Jun.)		
	2010	2011	2012	%Change (2012/2011)	Share (2012)	06/2012	06/2013	%Change
World	499,531	517,231	514,186	-1%	100%	240,353	242,565	1%
Australia	351,118	338,744	318,400	-6%	62%	153,553	135,578	-12%
United States	91,618	120,605	131,921	9%	26%	56,871	75,295	32%
New Zealand	31,584	29,739	31,412	6%	6%	17,661	15,928	-10%
Mexico	11,938	17,406	20,450	17%	4%	8,616	10,446	21%
Canada	12,926	10,179	11,468	13%	2%	3,393	4,985	47%
Others	347	558	535	-4%	0%	259	333	29%

Unit Value(United States Dollars) per Metric Ton

Partner Country	Calendar Year (Jan. – Dec.)				Year To Date (Jan. – Jun.)		
	2010	2011	2012	%Change (2012/2011)	06/2012	06/2013	%Change
World	4,585	5,115	5,372	5%	5,281	5,253	-1%
Australia	4,412	4,967	5,008	1%	4,990	4,965	0%
United States	5,362	5,701	6,378	12%	6,221	5,960	-4%
New Zealand	4,355	5,125	5,321	4%	5,217	5,310	2%
Canada	4,603	4,754	5,146	8%	5,277	4,308	-18%
Mexico	4,294	4,146	4,768	15%	4,389	4,238	-3%

Source of Data: Global Trade Atlas (Japan Customs)

Table 7-B: Japanese 2013 Beef Imports, Chilled Cuts/CIF Price YTD

Unit: Metric Ton (Customs Clearance Basis)

Partner Country	Calendar Year (Jan. - Dec.)					Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	2012 Share	06/2012	06/2013	% Chg.
World	211,445	213,400	212,425	0%	100%	100,151	104,721	5%
Australia	155,036	139,764	128,688	-8%	61%	61,175	57,895	-5%
United States	44,130	61,916	71,605	16%	34%	32,748	41,525	27%
New Zealand	7,316	7,531	7,975	6%	4%	4,186	3,663	-12%
Canada	3,730	2,909	2,423	-17%	1%	1,152	742	-36%
Mexico	1,232	1,280	1,732	35%	1%	890	873	-2%
Others	1	0	2	n.a.	0%	0	23	n.a.

Unit Value(United States Dollars) per Metric Ton

Partner Country	Calendar Year (Jan. - Dec.)				Year To Date (Jan. - Jun.)		
	2010	2011	2012	2012 Share	06/2012	06/2013	% Chg.
World	6,066	6,818	7,127	5%	7,058	6,930	-2%
New Zealand	6,437	7,203	7,769	8%	7,638	7,994	5%
United States	6,616	7,074	7,571	7%	7,404	7,309	-1%
Canada	6,998	7,376	7,413	1%	7,129	6,909	-3%
Australia	5,871	6,677	6,847	3%	6,850	6,575	-4%
Mexico	5,886	6,317	6,240	-1%	5,730	7,553	32%

Source of Data: Global Trade Atlas (Japan Customs)

Table 7-C: Japanese 2013 Beef Imports, Frozen Cuts/CIF Price YTD

Unit: Metric Ton (Customs Clearance Basis)

Partner Country	Calendar Year (Jan. - Dec.)					Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	2012 Share	06/2012	06/2013	%Change
World	288,086	303,831	301,761	-1%	100%	140,202	137,844	-2%
Australia	196,082	198,979	189,712	-5%	63%	92,378	77,683	-16%
United States	47,488	58,689	60,316	3%	20%	24,123	33,770	40%
New Zealand	24,268	22,207	23,437	6%	8%	13,475	12,264	-9%
Mexico	10,705	16,126	18,717	16%	6%	7,726	9,573	24%
Canada	9,196	7,270	9,045	24%	3%	2,241	4,243	89%
Others	347	560	534	-5%	0%	259	311	20%

Unit Value(United States Dollars) per Metric Ton

Partner Country	Calendar Year (Jan. - Dec.)				Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	06/2012	06/2013	% Chg.
World	3,498	3,919	4,137	6%	4,012	3,979	-1%
United States	4,197	4,252	4,962	17%	4,615	4,302	-7%
Mexico	4,111	3,974	4,632	17%	4,234	3,936	-7%
Canada	3,632	3,705	4,538	22%	4,326	3,853	-11%
New Zealand	3,728	4,420	4,489	2%	4,465	4,508	1%
Australia	3,259	3,767	3,760	0%	3,758	3,766	0%

Source of Data: Global Trade Atlas (Japan Customs)

Table 7-D: Japanese 2013 Beef Imports, Prepared and Processed Products/CIF Price YTD

Unit: Metric Ton (Customs Clearance Basis)

Partner Country	Calendar Year (Jan. - Dec.)					Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	2012 Share	06/2012	06/2013	% Chg.
World	11,995	11,715	9,548	-18%	100%	4,850	3,141	-35%
Australia	5,677	5,486	5,534	1%	58%	2,835	2,204	-22%
China	2,525	2,822	1,983	-30%	21%	1,081	655	-39%
Brazil	2,994	2,761	1,279	-54%	13%	531	0	-100%
New Zealand	498	421	431	2%	5%	202	159	-21%
Argentina	224	143	249	74%	3%	162	81	-50%
Others	77	82	72	-12%	1%	39	42	8%

Unit: Metric Ton (Customs Clearance Basis)

Partner Country	Calendar Year (Jan. - Dec.)					Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	2012 Share	06/2012	06/2013	% Chg.
World	11,995	11,715	9,548	-18%	100%	4,850	3,141	-35%
Australia	5,677	5,486	5,534	1%	58%	2,835	2,204	-22%
China	2,525	2,822	1,983	-30%	21%	1,081	655	-39%
Brazil	2,994	2,761	1,279	-54%	13%	531	0	-100%
New Zealand	498	421	431	2%	5%	202	159	-21%
Argentina	224	143	249	74%	3%	162	81	-50%
Others	77	82	72	-12%	1%	39	42	8%

Source of Data: Global Trade Atlas (Japan Customs)

Table 7-E: Japanese 2013 Beef Imports, Edible Meat and Offal/CIF Price YTD

Unit: Metric Ton (Customs Clearance Basis)

Partner Country	Calendar Year (Jan. - Dec.)					Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	2012 Share	06/2012	06/2013	% Chg.
World	41,763	44,192	43,325	-2%	100%	20,407	26,911	31.87
Australia	18,504	17,972	17,890	0%	41%	8,537	9,076	6.31
United States	13,899	17,186	16,358	-5%	38%	7,602	13,023	71.33
New Zealand	3,839	3,666	3,810	4%	9%	2,045	2,307	12.8
Mexico	2,335	2,375	2,645	11%	6%	1,091	1,146	5.03
Canada	2,146	2,052	1,668	-19%	4%	642	980	52.6
Others	1,040	941	954	1%	2%	490	379	

Unit Value(United States Dollars) per Metric Ton

Partner Country	Calendar Year (Jan. - Dec.)				Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	06/2012	06/2013	% Chg.
World	8,158	9,317	10,128	9%	9,612	9,036	-6%
United States	9,523	10,059	12,170	21%	11,591	10,500	-9%
Canada	8,412	9,107	10,633	17%	9,556	8,531	-11%
Australia	7,644	9,063	9,235	2%	8,673	7,895	-9%
New Zealand	7,227	9,219	8,064	-13%	8,147	6,944	-15%
Mexico	6,220	6,930	7,203	4%	6,956	6,769	-3%

Source of Data: Global Trade Atlas (Japan Customs)

Table 8-A: Japanese 2013 Total Pork Imports, Chilled and Frozen Cuts Combined/CIF Price YTD

Unit: Metric Ton (Customs Clearance Basis)

Partner Country	Calendar Year (Jan. - Dec.)					Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	2012 Share	06/2012	06/2013	% Chg.
World	753,027	793,096	778,804	-2%	100%	380,518	360,201	-5%
United States	298,347	323,750	313,860	-3%	40%	163,001	141,246	-13%
Canada	178,648	174,004	172,614	-1%	22%	81,158	66,770	-18%
Denmark	133,586	130,723	116,742	-11%	15%	57,220	54,892	-4%

Mexico	40,855	41,275	45,630	11%	6%	21,073	26,146	24%
Chile	24,507	28,956	28,918	0%	4%	13,068	14,232	9%
Others	77,084	94,388	101,040	7%	13%	44,998	56,915	26%

Source of Data: Global Trade Atlas (Japan Customs)

Note: Others are mostly frozen pork cuts from EU member countries.

Unit Value(United States Dollars) per Metric Ton							
Partner Country	Calendar Year (Jan. - Dec.)				Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	06/2012	06/2013	% Chg.
World	5,977	6,589	6,584	0%	6,592	5,523	-16%
Mexico	6,022	6,640	6,610	0%	6,627	5,574	-16%
Canada	5,965	6,598	6,580	0%	6,592	5,518	-16%
Chile	5,989	6,591	6,577	0%	6,592	5,500	-17%
Denmark	5,979	6,585	6,577	0%	6,577	5,502	-16%
United States	5,946	6,564	6,564	0%	6,568	5,508	-16%

Source of Data: Global Trade Atlas (Japan Customs)

Note: Across the board decline of average CIF price is due to strengthened dollar against Japanese Yen.

Table 8-B: Japanese 2013 Pork Imports, Chilled Cuts/CIF Price YTD

Unit: Metric Ton (Customs Clearance Basis)								
Partner Country	Calendar Year (Jan. - Dec.)					Year To Date		
	2010	2011	2012	% Chg. (2012/2011)	2012 Share	06/2012	06/2013	% Chg.
World	231,365	254,416	260,699	2%	100%	128,669	137,934	7%
United States	167,203	182,590	182,681	0%	70%	91,206	95,824	5%
Canada	54,434	62,333	69,019	11%	26%	32,919	37,942	15%
Mexico	9,397	9,190	8,745	-5%	3%	4,403	4,049	-8%
Others	331	303	254	-16%	0%	141	119	-16%

Source of Data: Global Trade Atlas (Japan Customs)

Unit Value(United States Dollars) per Metric Ton							
Partner Country	Calendar Year (Jan. - Dec.)				Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	06/2012	06/2013	% Chg.
World	5,983	6,582	6,560	0%	6,571	5,501	-16%
Canada	6,009	6,602	6,577	0%	6,590	5,504	-16%
Mexico	5,992	6,598	6,567	0%	6,578	5,519	-16%
United States	5,970	6,569	6,550	0%	6,559	5,493	-16%

Source of Data: Global Trade Atlas (Japan Customs)

Table 8-C: Japanese 2013 Pork Imports, Frozen Cuts/CIF Price YTD

Unit: Metric Ton (Customs Clearance Basis)								
Partner Country	Calendar Year (Jan. - Dec.)					Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	Share (2012)	06/2012	06/2013	% Chg.
World	521,662	538,679	518,104	-4%	100%	251,849	222,267	-12%
United States	131,144	141,160	131,179	-7%	25%	71,795	45,422	-37%
Denmark	133,513	130,699	116,742	-11%	23%	57,220	54,892	-4%
Canada	124,214	111,672	103,595	-7%	20%	48,240	28,828	-40%
Mexico	31,458	32,086	36,885	15%	7%	16,671	22,097	33%
Chile	24,507	28,913	28,907	0%	6%	13,058	14,232	9%
Others	76,826	94,149	100,796	7%	19%	44,865	56,796	27%

Source of Data: Global Trade Atlas (Japan Customs)

Unit Value(United States Dollars) per Metric Ton							
Partner Country	Calendar Year (Jan. - Jun.)				Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg.	06/2012	06/2013	% Chg.
World	5,974	6,593	6,596	0%	6,602	5,538	-16%
Mexico	6,031	6,653	6,620	0%	6,639	5,585	-16%
United States	5,916	6,558	6,583	0%	6,578	5,540	-16%
Canada	5,946	6,596	6,582	0%	6,593	5,538	-16%
Chile	5,989	6,591	6,577	0%	6,592	5,500	-17%
Denmark	5,979	6,585	6,577	0%	6,577	5,502	-16%

Source of Data: Global Trade Atlas (Japan Customs)

Table 8-D: Japanese 2013 Pork Imports, Prepared and Processed Products/CIF Price YTD

Unit: Metric Ton (Customs Clearance Basis)								
Partner Country	Calendar Year (Jan. - Dec.)					Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	2012 Share	06/2012	06/2013	% Chg.
World	168,869	171,549	190,030	11%	100%	94,197	99,234	5%
United States	104,274	110,054	116,612	6%	61%	60,721	63,343	4%
China	27,815	25,178	30,909	23%	16%	13,744	12,402	-10%
Canada	16,572	14,598	15,227	4%	8%	7,736	8,864	15%
Thailand	7,362	7,345	8,309	13%	4%	3,752	4,204	12%
Mexico	1,641	2,108	5,812	176%	3%	2,453	2,778	13%
Chile	4,848	5,163	5,326	3%	3%	2,345	3,030	29%
Others	6,357	7,103	7,835	10%	4%	3,446	4,613	34%

Source of Data: Global Atlas (Japan Customs)

Annual Series: 2008 - 2012, Year To Date: 06/2012 & 06/2013							
Unit Value(United States Dollars) per Metric Ton							
Partner Country	Calendar Year (Jan. - Dec.)				Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	06/2012	06/2013	% Chg.
World	3,733	4,225	4,249	1%	4,230	3,782	-11%
Thailand	7,127	8,243	8,632	5%	8,657	7,914	-9%
China	4,710	5,533	5,956	8%	6,182	5,111	-17%
Denmark	5,559	5,542	5,486	-1%	5,582	3,983	-29%
Mexico	3,646	3,677	3,607	-2%	3,563	3,947	11%
United States	3,160	3,540	3,386	-4%	3,443	3,187	-7%
Canada	2,562	3,263	3,237	-1%	3,327	2,658	-20%
Chile	2,451	2,572	2,557	-1%	2,583	2,180	-16%

Source of Data: Global Trade Atlas (Japan Customs)

Table 8-E: Japanese 2013 Imports of Sausages/CIF Price YTD

Unit: Metric Ton (Customs Clearance Basis)								
Partner Country	Calendar Year (Jan. - Dec.)					Year To Date (Jan. - Dec.)		
	2010	2011	2012	% Chg. (2012/2011)	2012 Share	06/2012	06/2013	% Chg.
World	43,347	45,702	51,179	12%	100%	24,576	23,154	-6%
China	23,244	23,054	24,253	5%	47%	11,982	9,032	-25%
United States	8,711	9,231	10,651	15%	21%	4,876	5,546	14%
Thailand	5,425	7,796	8,935	15%	17%	4,217	5,189	23%
Brazil	1,893	1,567	2,337	49%	5%	1,196	1,358	14%
Others	4,074	4,054	5,003	23%	10%	2,305	2,029	-12%

Source of Data: Global Trade Atlas (Japan Customs)

Unit Value(United States Dollars) per Metric Ton							
Partner Country	Calendar Year (Jan. - Dec.)				Year To Date (Jan. - Jun.)		
	2010	2011	2012	% Chg. (2012/2011)	06/2012	06/2013	% Chg.
World	4,854	5,505	5,690	3%	5,679	5,258	-7.42
China	4,532	5,375	5,695	6%	5,662	5,244	-7.39
Thailand	5,047	5,360	5,489	2%	5,435	5,027	-7.5

United States	4,804	5,390	5,428	1%	5,583	5,184	-7.15
Brazil	3,874	3,848	4,073	6%	4,031	3,974	-1.4

Source of Data: Global Trade Atlas (Japan Customs)

Table 9: Japan Year Beginning Livestock Inventory

As of February 1 Each Year							
	2009	**2010**	**2011**	**2012**	**%chg**	**2013**	**%chg**
Beef Cattle							
Number of Beef Cattle Farms (1,000 farms)	77.3	74.4	69.6	65.2	-6%	61.3	-6%
Beef Cattle (Wagyu and Other) (1,000 head)	1,889	1,924	1,868	1,831	-2%	1,769	-3%
Dairy Cattle for Beef	431	421	412	412	0%	412	0%
F-1 Cross Bred Cattle	636	547	483	499	3%	498	0%
Sub Total Dairy & F-1 Cattle for Beef	1,067	968	895	892	0%	873	-2%
Total Beef Cattle Raised	**2,956**	**2,892**	**2,763**	**2,723**	**-1%**	**2,642**	**-3%**
Dairy Cattle							
Number of Dairy Cattle Farms (Female) (1,000 farms)	23.1	21.9	21.0	20.1	-4%	19.4	-3%
Total Dairy Cow and Heifer Raised (1,000 head)	1,500	1,484	1,467	1,449	-1%	1,423	-2%
Total Cattle Raised	**4,456**	**4,376**	**4,230**	**4,172**	**-1%**	**4,065**	**-3%**
Swine							
	2009	2010	2011	2012	%chg	2013	%chg
Number of Swine Farms (1,000 farms)	6.9	N.A.	6.0	5.8	-3%	5.6	-5%
Number of Hogs Raised for Fattening (1,000 head)	8,220	N.A.	8,186	8,145	-1%	8,106	0%
Total Swine Raised	**9,899**	**N.A.**	**9,768**	**9,735**	**0%**	**9,685**	**-1%**
Source: MAFF Livestock Statistics							

Note: Due to Agricultural Census to be conducted every five year, only the cattle inventory data for the year beginning of 2010 was announced, but for the hog inventory, statistical data collection was not made.