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Japan

Livestock and Products Semi-annual

2018 Market Situation Summary and 2019 Outlook

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Report Highlights:

Total cattle slaughter increased in 2018 as calf prices stabilized, permitting beef producers to reduce on-farm cow retention which had expanded in recent years. As this trend continues, FAS/Tokyo raises its projection for Japanese beef production in 2019. Lower domestic and imported beef prices fueled growth in consumption and trade which is projected to continue in 2019. Growth in pork supply was limited, with domestic production and imports increasing only slightly in 2018. Japan continues efforts to stamp out an outbreak of classical swine fever which was detected in September 2018 and affected five prefectures.

Commodities:

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

Preface:

This report is an update to [JA8043](#) dated July 31, 2018. Quantities listed in the text are made on the basis of Carcass Weight Equivalent (CWE) unless specified otherwise.

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

PSD
**Production, Supply and Distribution Data Statistics:
 Cattle PS&D**

Animal Numbers, Cattle Market Begin Year Japan	2017		2018		2019	
	Jan 2017		Jan 2018		Jan 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stks	3822	3822	3822	3842	3830	3839
Dairy Cows Beg. Stocks	852	852	847	847	855	850
Beef Cows Beg. Stocks	597	597	610	610	615	615
Production (Calf Crop)	1201	1201	1200	1200	1200	1205
Total Imports	15	15	9	14	10	10
Total Supply	5038	5038	5031	5056	5040	5059
Total Exports	0	0	0	0	0	0
Cow Slaughter	468	468	465	484	460	475
Calf Slaughter	5	5	5	5	5	5
Other Slaughter	572	572	570	567	570	570
Total Slaughter	1045	1045	1040	1056	1035	1050
Loss	171	151	161	161	170	169
Ending Inventories	3822	3842	3830	3839	3835	3840
Total Distribution	5038	5038	5031	5056	5040	5059

(1000 HEAD)

Not USDA Official Data

Beef and Veal PS&D

Meat, Beef and Veal Market Begin Year Japan	2017		2018		2019	
	Jan 2017		Jan 2018		Jan 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	1045	1045	1040	1056	1035	1050
Beginning Stocks	151	151	156	156	140	168
Production	469	469	470	475	468	475
Total Imports	817	817	835	865	850	870
Total Supply	1437	1437	1461	1496	1458	1513
Total Exports	4	3	5	5	3	6
Human Dom. Consumption	1277	1278	1316	1323	1320	1340
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	1277	1278	1316	1323	1320	1340
Ending Stocks	156	156	140	168	135	167
Total Distribution	1437	1437	1461	1496	1458	1513

(1000 HEAD) ,(1000 MT CWE)

Not USDA Official Data

Swine PS&D

Animal Numbers, Swine Market Begin Year Japan	2017		2018		2019	
	Jan 2017		Jan 2018		Jan 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Beginning Stocks	9346	9346	9280	9280	9260	9160
Sow Beginning Stocks	839	839	830	830	825	825
Production (Pig Crop)	16785	16785	16695	16690	16600	16690
Total Imports	1	1	1	1	1	1
Total Supply	26132	26132	25976	25971	25861	25851
Total Exports	0	0	0	0	0	0
Sow Slaughter	0	0	0	0	0	0
Other Slaughter	16336	16336	16335	16430	16325	16430
Total Slaughter	16336	16336	16335	16430	16325	16430
Loss	516	516	381	381	371	361
Ending Inventories	9280	9280	9260	9160	9165	9060
Total Distribution	26132	26132	25976	25971	25861	25851

(1000 HEAD)

Not USDA Official Data

Pork PS&D

Meat, Swine Market Begin Year Japan	2017		2018		2019	
	Jan 2017		Jan 2018		Jan 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference)	16336	16336	16335	16430	16325	16430
Beginning Stocks	211	211	222	222	227	208
Production	1282	1272	1285	1284	1285	1290
Total Imports	1475	1475	1510	1481	1525	1510
Total Supply	2968	2958	3017	2987	3037	3008
Total Exports	5	5	5	4	5	5
Human Dom. Consumption	2741	2731	2785	2775	2806	2785
Other Use, Losses	0	0	0	0	0	0
Total Dom. Consumption	2741	2731	2785	2775	2806	2785
Ending Stocks	222	222	227	208	226	218
Total Distribution	2968	2958	3017	2987	3037	3008

(1000 HEAD) ,(1000 MT CWE)

Not USDA Official Data

NOTE: For Dairy Cows Beginning Stocks, FAS/Tokyo recently became aware of data issued by the Japanese Ministry of Agriculture, Forestry and Fisheries (MAFF) which includes data for “dairy cows not in milk.” As this data was not previously included in our PS&D tables, FAS/Tokyo is revising the Dairy Cows Beginning Stocks data to include “dairy cows not in milk.” FAS/Tokyo will henceforth include this data in future PS&D tables. USDA Official estimates for the past 10 years have also been updated in the [PSD Online](http://www.aphis.usda.gov/psd/) system to reflect this adjustment. MAFF data available at <http://www.maff.go.jp/j/tokei/kouhyou/tikusan/index.html>.

Beef

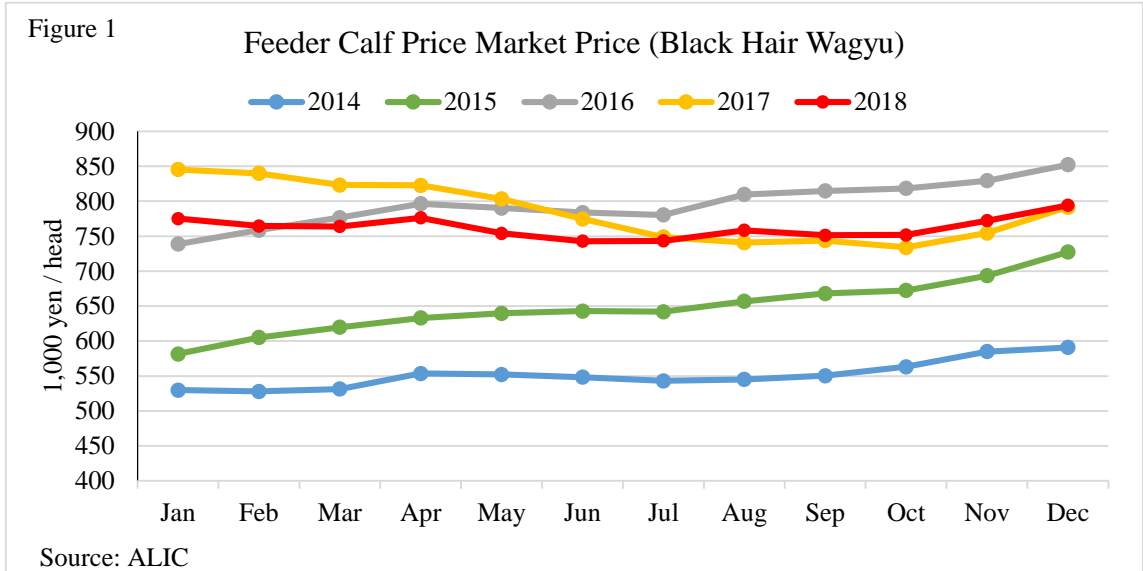
2018 Market Situation Summary

Production

Total cattle slaughter in 2018 was estimated at 1.056 million head, up 1.1 percent from the previous year. Steer slaughter held steady at 567,000 head as cow slaughter increased 3.4 percent to 484,000. In particular, black hair wagyu cow slaughter increased 4.8 percent and F-1 cross breed cow slaughter increased 5.8 percent. The increase in beef cow slaughter is primarily attributable to feeder calf prices stabilizing after years of growth. As seen in Figure 1 below, wagyu calf prices grew year-over-year from 2014 to 2017, incentivizing wagyu producers to retain cows longer for on-farm calf production. Prices began to fall in mid-2017 and remained relatively stable throughout 2018, giving producers the flexibility to reduce older cow populations. Between 2014 and 2018, the number of cows 10 years or older had increased by 34 percent, according to MAFF statistics.

Japanese calf crop production remained flat in 2018 at 1.200 million head, in line with FAS/Tokyo’s previous projection. Calf prices dipped slightly in the first half of the year, but rebounded solidly in the second half of the year reaching 794,000 yen per head (approximately 7,200 USD). Dairy heifer prices remained at a five-year high for most the year, pushing dairy producers to increase imports of live cattle to 14,482 head.

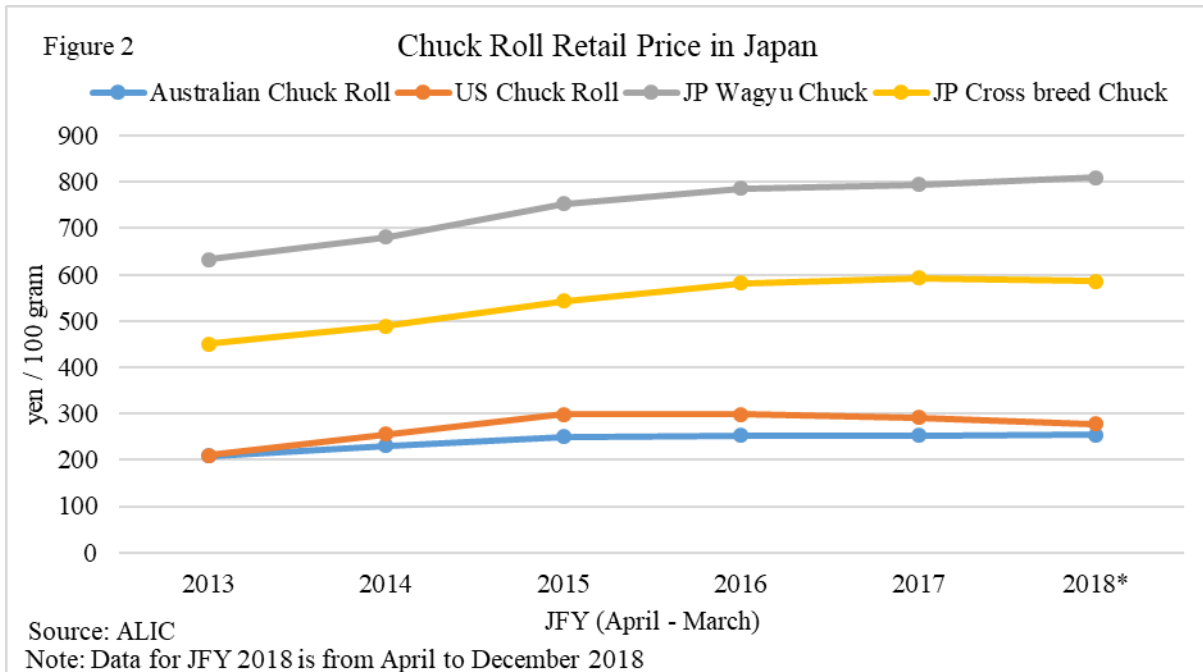
On higher slaughter and flat calf production, year-end cattle stocks fell below FAS/Tokyo’s previous projection to 3.839 million head, down only slightly from 2017. Higher total slaughter yielded 475,000 MT of beef production, up 1.3 percent from the previous year.



Consumption

Japanese beef consumption in 2018 totaled 1.323 million MT, up 3.5 percent from 2017 and above FAS/Tokyo’s previous projection. Greater supply and lower domestic beef prices helped stimulate demand. According to Japan’s Ministry of Internal Affairs and Communications, per capita table meat consumption of beef increased 2.4 percent to 2,259 grams per person while per capita expenditures on beef decreased 0.3 percent to 7,351 yen per capita.

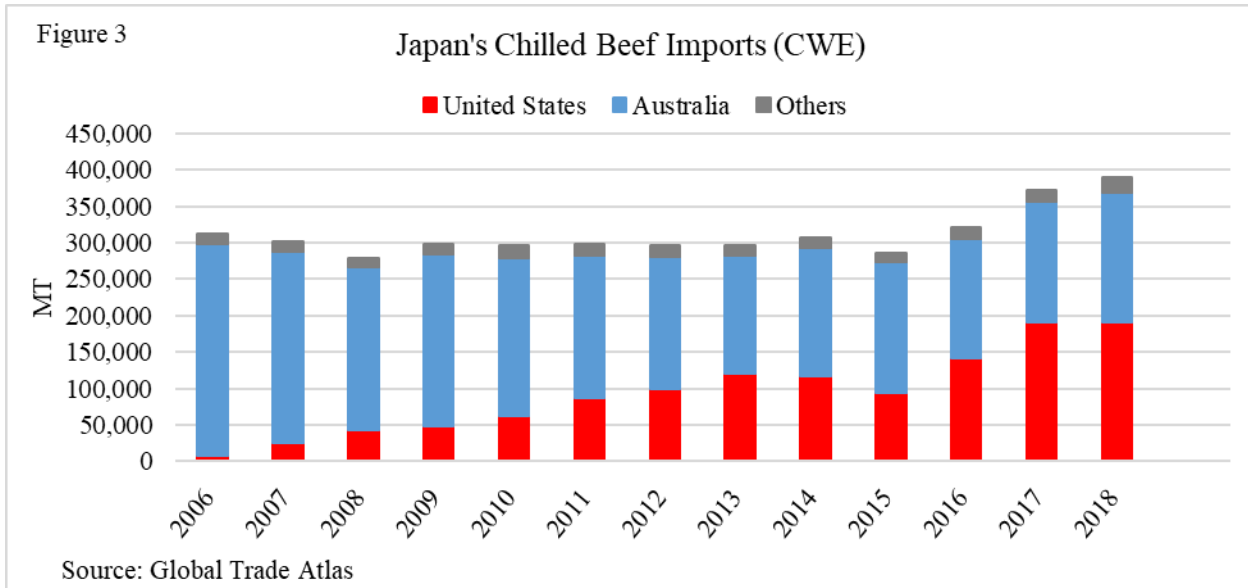
Increased slaughter helped domestic beef prices stabilize after years of growth. F-1 cross breed chuck roll prices declined for the first time in five years, down 1.2 percent to 586 yen (5.33 USD) per 100 grams (see Figure 2). Imported beef also became more affordable as U.S. chuck roll fell five percent to 278 yen (2.53 USD) and Australian chuck roll increased only 0.4 percent to 254 yen (2.31 USD). The price gap between U.S. and Australian chuck roll narrowed to 24 yen (0.22 USD). Overall, domestic wagyu and cross breed beef remained 2-3 times more expensive than imports.



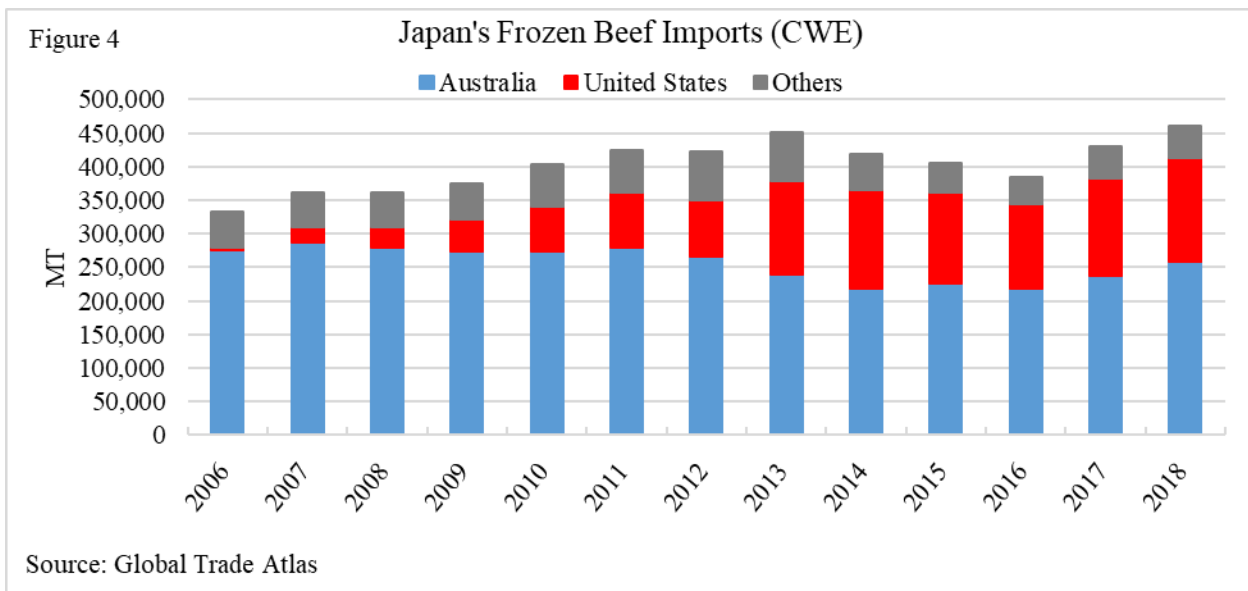
Consumers continued to enjoy eating outside of the home, particularly at establishments serving beef. According to the Japan Foodservice Association, overall food service sector revenue was up 2.3 percent in 2018. Yakiniku (Korean-style barbecue) restaurants were exceptionally popular with revenue up 5.6 percent and customer intake up 5.2 percent. Western-style fast food restaurants, including hamburger chains, also saw revenue grow 3.8 percent and customer intake up 2.3 percent.

Trade

Japan's beef imports (including chilled, frozen, and processed beef) totaled 865,210 MT, exceeding FAS/Tokyo's previous projection and up six percent from 2017. This is the highest volume Japan has imported since 2005 when it reopened the market to U.S. and Canadian beef. Import growth has been driven primarily by growing consumer preference for leaner meat which is viewed as a healthier alternative to fatty, marbled domestic beef. Since imports account for approximately two-thirds of Japanese beef consumption, marginal growth in domestic production had a minimal impact on trade. Australia remained the largest supplier by volume at 444,507 MT followed by the United States at 351,216 MT.



Japan imported 390,340 MT of chilled beef, up 4.9 percent from 2017. Imports from the United States dipped 0.4 percent to 191,089 MT while imports from Australia grew 8.4 percent to 178,426 MT. FAS/Canberra reported that the number of grain-fed cattle reached record numbers in mid-2018 (see [AS1820](#)), which enabled Australia to capture additional share of Japan's growing market for imported grain-fed chilled beef. Meat and Livestock Australia reports that Australian slaughter increased seven percent in 2018 which helped boost exports to Japan by 14 percent on a value basis.



Japan imported 460,101 MT of frozen beef, up seven percent from 2017. Australia remained the largest frozen supplier at 257,928 MT, up 8.4 percent from 2017. Frozen imports from the United States kept pace, up 8.2 percent to 155,311 MT. U.S. frozen imports rebounded well after the safeguard tariff was removed on April 1, 2018, after coming into effect in August 2017. This allowed traders to replenish stocks to 168,000 MT after stocks had tightened in the final months of the safeguard. For more information on the safeguard, see [JA8021](#).

2019 Market Outlook

Beginning cattle stocks for 2019 are estimated slightly lower after a high beef cow slaughter in 2018. FAS/Tokyo projects calf crop to increase 0.4 percent to 1.205 million head on slightly higher numbers of heifers calving for the first time. Steer slaughter is forecast unchanged at 570,000 head. FAS/Tokyo revises projected total cow slaughter up to 475,000 head, but the pace of beef cow slaughter is likely to slow over the year as wagyu producers finish thinning older cow populations. Overall slaughter is projected up 1.5 percent from its previous projection to 1.050 million head. High calf prices in the second half of 2018 will have a limiting effect on new cattle entering feedlots, leading to longer feeding times and slightly heavier finishing weights. FAS/Tokyo projects 475,000 MT in beef production in 2019, up from its previous projection, but flat from 2018. Ending cattle stocks are projected to hold steady at 3.840 million head.

FAS/Tokyo projects domestic consumption to grow to 1.340 million MT. Reduced slaughter could push up domestic beef prices slightly, but this would be offset by reduced import prices for chilled and frozen beef from CPTPP as tariffs fall further to 26.6 percent on April 1, 2019. FAS/Tokyo projects beef imports to grow one percent to 870,000 MT, allowing ending stocks to maintain at 167,000 MT.

Effective December 30, 2018, Japan lowered tariffs on beef imports from member countries of the Comprehensive and Progressive Partnership for Trans-Pacific Partnership (CPTPP) which includes Australia. Identical tariff cuts were made for European Union (EU) countries when the Japan-EU Economic Partnership Agreement (EPA) came into effect February 1, 2019, although the EU is not a significant supplier of beef to Japan. A second round of cuts will come into effect April 1, 2019 for both CPTPP countries and the EU as tariffs on chilled and frozen beef are reduced to 26.6 percent. Countries outside of these agreements continue to pay the most-favored nation tariff rate of 38.5 percent. For more information on these tariff cuts, see [JA8109](#).

As a result of these agreements coming into force, Japan also revised its beef safeguard trigger calculations by removing the trade agreement member countries from the non-EPA trigger volume (details available in [JA8109](#)). See Table 1–A in the supplemental tables for the revised trigger volumes and current trade. The non-EPA trigger level for frozen beef was surpassed in December 2018, however there is 80,785 MT of room in the all partners trigger volume for the final three months of Japan fiscal year 2018 (January-March 2018). This would mean imports from January-March 2019 would need to increase 42 percent compared to the previous year for the safeguard to trigger. Japanese press has reported that importers are monitoring the safeguard closely in order to avoid triggering for the second time in two years.

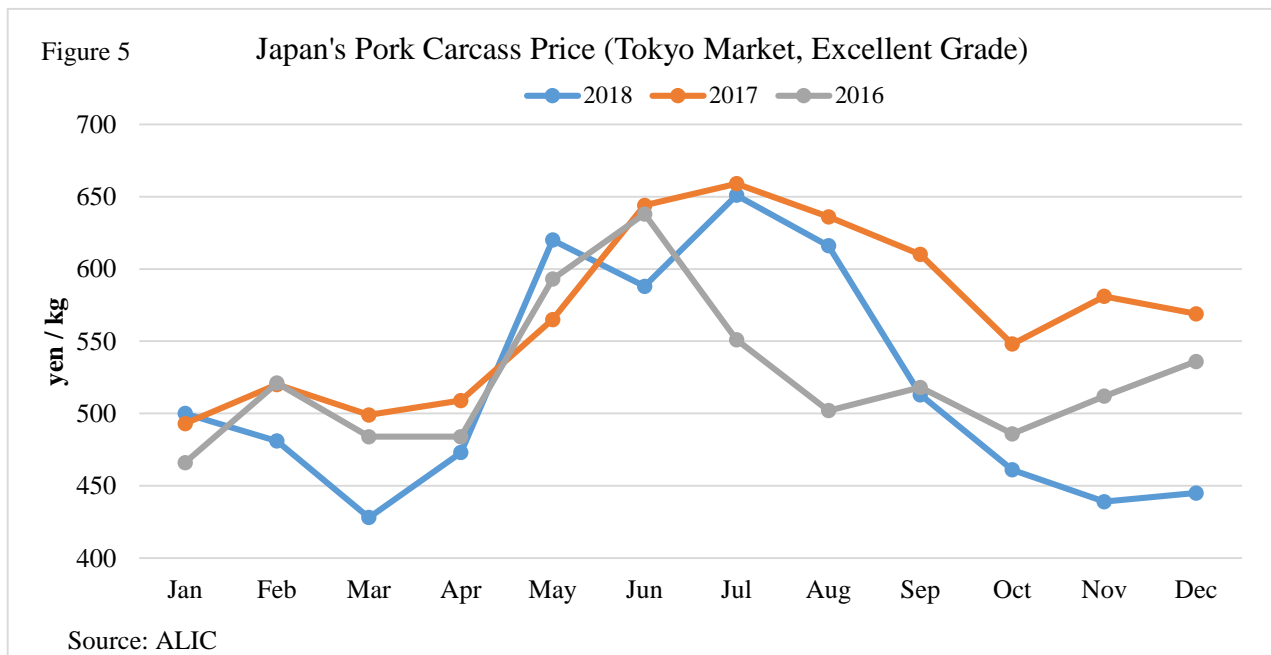
Pork

Production

Japan's hog slaughter for 2018 totaled 16.430 million head, up 0.6 percent from 2017 and above FAS/Tokyo's previous estimate. Higher slaughter yielded increased pork production at 1.284 million

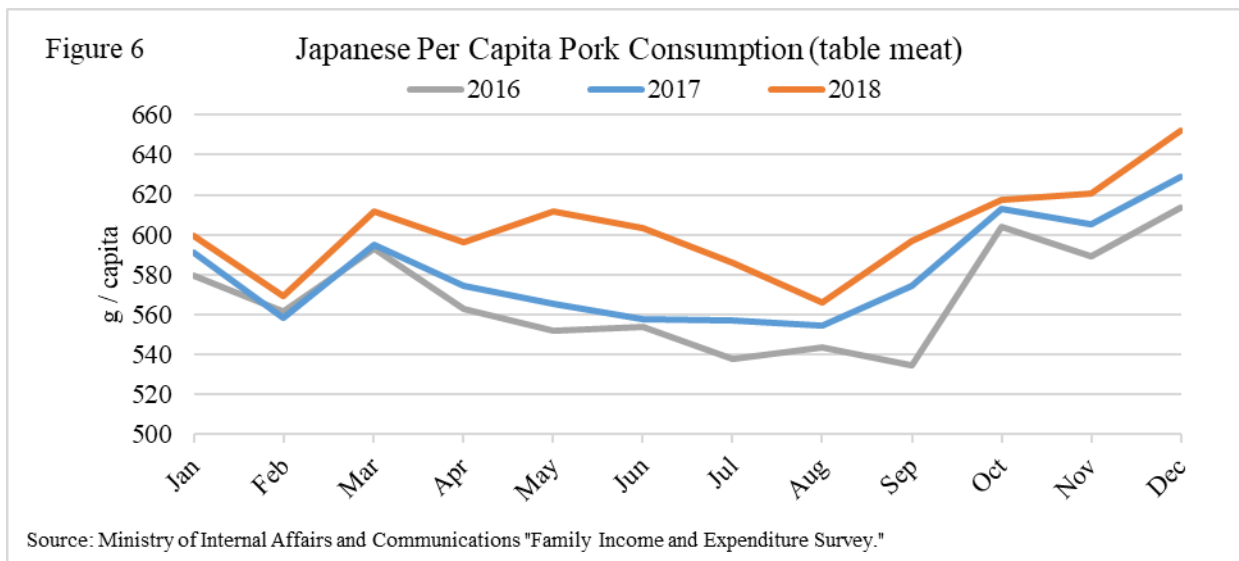
MT, up one percent from the previous year. Increased production pushed domestic pork carcass prices down 6.4 percent from 2017 (see Figure 5).

In September 2018, MAFF confirmed the presence of Classical Swine Fever (CSF), also known as hog cholera, in Gifu Prefecture. This marked the first confirmed case of the disease in Japan since 1992 and led to the suspension of Japan’s CSF disease-free status at the International Organization for Animal Health (OIE). As of February 25, 2019, MAFF has confirmed a total of ten CSF cases across five prefectures (Gifu, Aichi, Nagano, Shiga and Osaka) and culled 47,344 head (about 0.5 percent of the total swine population) in an effort to stamp out the disease. All five prefectures are located in central Japan and together account for around six percent of Japan’s total swine population. Because the cull started late in the year, FAS/Tokyo does not anticipate CSF to have had a significant impact on the total slaughter for 2018. However, as a result of the cull and increased overall slaughter, FAS/Tokyo lowers ending swine stocks for 2018 to 9.160 million head, down 1.3 percent from the previous year.



Consumption

FAS/Tokyo estimates pork consumption at 2.775 million MT in 2018, relatively unchanged from its previous estimate and up 1.6 percent from the previous year. According to Japan’s Ministry of Internal Affairs and Communications, household table meat consumption of pork increased 3.7 percent to 7,232 grams per capita in 2018 (see Figure 6). Households increased their annual expenditure on pork meat, up two percent to 10,283 yen per capita (approximately 93 USD). Consumers benefitted from increased domestic production keeping retail prices low throughout the year, particularly in the summer months when pork consumption typically peaks on increased barbecue and foodservice consumption. Consumption slowed somewhat in the latter months of the year as mild temperatures dampened demand for pork muscle meat and offal use in hot pots. However, the overall trend established in the past several years of declining seafood supplies and increasing “Westernization” of Japanese tastes continue to push the market toward greater pork consumption.

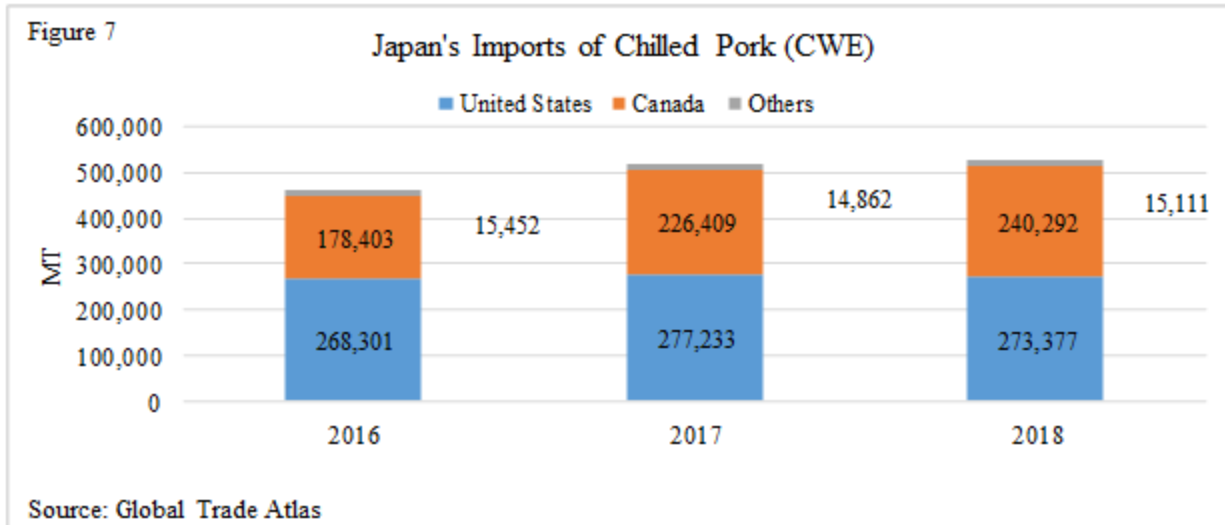


Industry sources report that the detection of CSF in Gifu prefecture in September had no significant impact on pork consumption in part because national news coverage remained relatively limited compared to local and industry press.

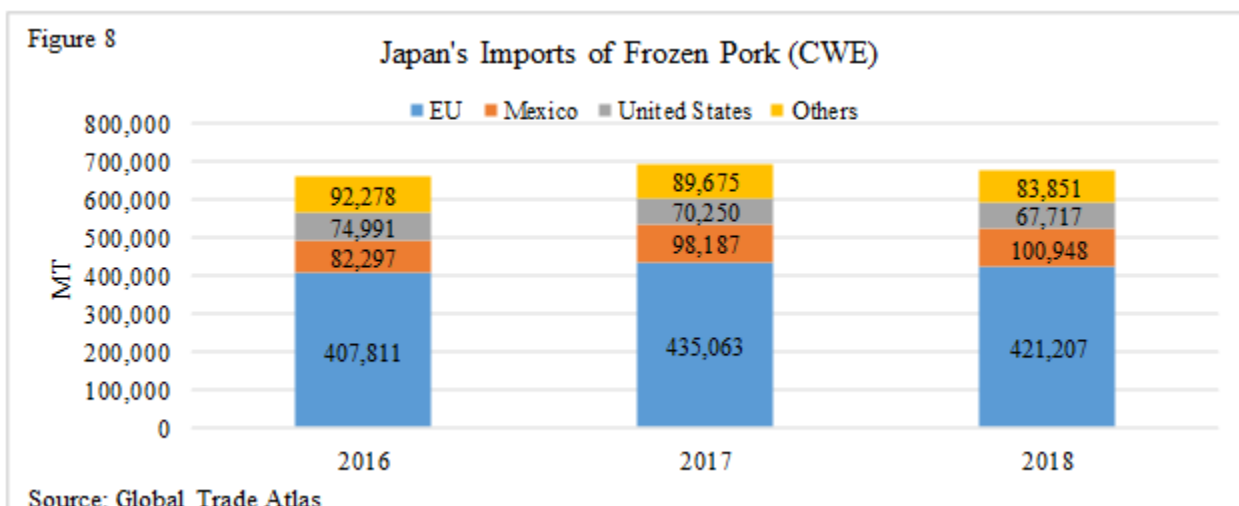
Trade

Japan imported 1.481 million MT (CWE) of pork (chilled, frozen and processed pork) in 2018, slightly below FAS/Tokyo's previous projection and only 0.4 percent higher than 2017. Slow import growth is partly attributable to higher-than-expected domestic production which dampened demand for imported product. For chilled, frozen and processed pork combined, the United States accounted for approximately 34 percent of Japan's total pork imports in 2018, remains flat from 2017. Lower than expected total imports in 2018 pushed ending stocks down 6.3 percent to 208,000 MT.

Industry sources report that some importers also likely delayed customs clearance of certain pork products at the end of the year to capitalize on lower tariffs coming into effect with Japan's new free trade agreements. CPTPP came into effect on December 30, 2018, lowering tariffs on pork imports from ten countries including Canada, a key supplier of chilled pork to Japan. The Japan-EU EPA came into effect on February 1, 2019, lowering tariffs on frozen pork, one of the EU's main agricultural exports to Japan. For more information on the pork tariff concessions in each of these agreements see [JA9006](#)).



Japan imported 528,780 MT of chilled pork in 2018. The United States accounted for the largest volume at 273,377 MT (52 percent share) followed by Canada at 240,292 MT (45 percent share). Compared to 2017, the U.S. share shrank by 1.4 percentage points while Canada's share grew by 6.1 percentage points. Industry sources report that increased domestic supply during the peak summer season led retailers to shift sales of imported chilled pork to the offseason which they found to be equally profitable as consumer appreciated wider price selection throughout the year.



Japan imported 673,723 MT (CWE) of frozen pork in 2018, down 2.8 percent from the previous year. The European Union remained the largest supplier, accounting for 421,207 MT (63 percent share). Mexico was the second largest supplier at 100,948 MT (15 percent share), followed by the United States at 67,717 MT (ten percent share).

2019 Market Outlook

FAS/Tokyo projects that current market dynamics will hold in 2019 with total slaughter remaining flat at 16.430 million head. Industry sources indicate that slaughter in the first half of 2019 will likely fall below the previous year's level, but rebound in the second half as large-scale producers in southern Japan increase hog production to make up for potential losses in the CSF-affected areas. Pig crop production is likewise projected to hold steady at 16.690 million head, but a lack of growth will leave ending swine stocks 1.1 percent lower at 9.060 million head.

Sustained slaughter numbers will enable pork production to maintain at 1.290 million MT. FAS/Tokyo projects domestic consumption to continue moderate growth, up 0.4 percent to 2.785 million MT. Any potential negative effect from media coverage of CSF is likely to be offset by an exceptionally long ten-day public holiday in May during which consumers are likely increase spending at family restaurant-type establishments that are major users of imported pork loin.

Tariffs on pork imports from the CPTPP countries and the EU will fall again on April 1, 2019. From that period onward, importers may increase purchases to fill the domestic supply gap as well as rebuild stocks which tightened at the end of 2018. FAS/Tokyo maintains its previous forecast for 2019 imports at 1.510 million MT, up two percent from 2018 and pushing ending stocks up five percent to 218,000 MT.

Supplemental Tables:

Table 1-A: Beef Safeguard Monitor

I-a. Trigger Levels for All Trade Partners for JFY 2018 and Actual Imports Year to Date

Chilled Beef

Unit: Metric Ton

	Trigger Levels for JFY 2018	Actual Entry			Room under the trigger
		Month	Amount	Cum. Total	
Q1	80,525	April	25,139	25,139	55,386
		May	24,915	50,054	30,471
		June	23,467	73,521	7,004
Q2	165,647	July	25,964	99,485	66,162
		August	26,285	125,770	39,877
		September	20,790	146,560	19,087
Q3	244,968	October	23,679	170,239	74,729
		November	24,880	195,119	49,849
		December	22,844	217,963	27,005
Q4	316,165	January			
		February			
		March			

Frozen Beef

Q1	104,427	April	37,002	37,002	67,425
		May	29,224	66,226	38,201
		June	23,870	90,096	14,331
Q2	211,350	July	39,593	129,689	81,661
		August	31,434	161,123	50,227
		September	31,479	192,602	18,748
Q3	286,291	October	27,741	220,343	65,948
		November	26,783	247,126	39,165
		December	24,772	271,898	14,393
Q4	352,683	January			
		February			
		March			

I-b. Trigger Levels for Non-EPA Trade Partners for JFY 2018 and Actual Imports Year to

Chilled Beef

Unit: Metric Ton

	Trigger Levels for JFY 2018	Actual Entry			Room under the trigger
		Month	Amount (MT)	Cum. Total	
Q1	43,205	April			
		May			
		June			
Q2	91,008	July			
		August			
		September			
Q3	125,634	October			
		November		94,017	31,617
		December	11,776	105,793	19,841
Q4	162,422	January			
		February			
		March			

Frozen Beef

Q1	44,254	April			
		May			
		June			
Q2	89,315	July			
		August			
		September			
Q3	94,915	October			
		November		90,453	4,462
		December	9,548	100,001	-5,086
Q4	108,633	January			
		February			
		March			

Date Source: ALIC

Note: The above volumes for the non-EPA trigger conditions reflect Japan's revisions effective February 1, 2019 after the entry into force of CPTPP and the Japan-EU EPA. Revised data for April to November 2018 is expected to be announced by the Ministry of Finance on or around April 1, 2019 with the new trigger volumes for JFY 2019. More information on the beef safeguard is available on [JA8109](#)

Table 1-B: Pork Safeguard Monitor

SG

All Trade Partners

Unit: Metric Ton

	Trigger Levels for JFY 2018	Actual Entry			Room under the trigger
		Month	Amount	Cum. Total	
Q1		April			
		May			
		June			
Q2		July			
		August			
		September			
Q3	792,226	October			
		November		637,490	154,736
		December	74,028	711,518	80,708
Q4	1,054,279	January			
		February			
		March			

Non-EPA Partners

Q1		April			
		May			
		June			
Q2		July			
		August			
		September			
Q3	528,919	October			
		November		406,606	122,313
		December	45,944	452,550	76,369
Q4	324,805	January			
		February			
		March			

SSG

All Trade Partners

Unit: Metric Ton

	Trigger Levels for JFY 2018	Actual Entry			Room under the trigger
		Month	Amount (MT)	Cum. Total	
Q1	971,357	April			
		May			
		June			
Q2		July			
		August			
		September			
Q3		October			
		November		637,509	333,848
		December	74,030	711,539	259,818
Q4		January			
		February			
		March			

Non-EPA Partners

Q1	286,800	April			
		May			
		June			
Q2		July			
		August			
		September			
Q3		October			
		November		406,617	-119,817
		December	45,947	452,564	-165,764
Q4		January			
		February			
		March			

Source: ALIC

Note: The above volumes for the trigger conditions reflect Japan's revisions effective February 1, 2019 after the entry into force of CPTPP and the Japan-EU EPA. Revised data for April to November 2018 is expected to be announced by the Ministry of Finance on or around April 1, 2019 with the new trigger volumes for JFY 2019. More information on the pork safeguard is available on [JA9006](#)

Table 2-A: Monthly Ending Beef Stock Estimates

United: Metric Ton (CWE Converted)							
Month / Year	2015	2016	% Chg.	2017	% Chg.	2018	% Chg.
Jan	184,775	177,155	-4	147,329	-17	149,493	1
Feb	176,648	168,689	-5	144,337	-14	145,652	1
Mar	178,385	162,392	-9	143,910	-11	136,595	-5
Apr	188,873	160,255	-15	143,895	-10	137,883	-4
May	196,265	167,520	-15	147,473	-12	145,940	-1
Jun	202,262	171,811	-15	151,698	-12	149,255	-2
Jul	202,241	177,565	-12	159,134	-10	161,903	2
Aug	198,636	178,413	-10	162,439	-9	172,593	6
Sep	200,381	174,805	-13	166,804	-5	171,823	3
Oct	197,273	162,847	-17	165,682	2	172,575	4
Nov	196,574	158,376	-19	164,479	4	176,056	7
Dec	185,345	151,116	-18	155,753	3	167,675	8

Sources : MAFF,"Meat Marketing Statistics", Ministry of Finance,"Japan Exports and Imports."Figures for stocks are estimated by ALIC.

Table 2-B: Monthly Ending Pork Stock Estimates

United: Metric Ton (CWE Converted)							
Month / Year	2015	2016	% Chg.	2017	% Chg.	2018	% Chg.
Jan	240042	218539	-9	228337	4	229785	1
Feb	233146	218742	-6	222435	2	236361	6
Mar	232172	220194	-5	230775	5	235266	2
Apr	244282	225502	-8	226226	0	231356	2
May	251971	231754	-8	236863	2	234372	-1
Jun	245311	234361	-4	235581	1	232077	-1
Jul	238221	223907	-6	228890	2	228848	0
Aug	232287	229206	-1	230182	0	228839	-1
Sep	220672	220194	0	222369	1	217827	-2
Oct	213147	212792	0	217122	2	215679	-1
Nov	207094	213507	3	220510	3	212442	-4
Dec	200170	210908	5	222074	5	208469	-6

Sources : MAFF,"Meat Marketing Statistics", Ministry of Finance,"Japan Exports and Imports." Figures for stocks are estimated by ALIC.

Table 3-A: Japanese Year Beginning Cattle Inventory

Beef Cattle Inventory (Part 1)

Unite: Farm/Head

Year Beginning (As of Feb. 1)	Total Number of Farms	Grand Total (Beef and Dairy Breed Combined)	Beef Breed Total				
			Beef Breed Total	Black Wagyu	Brown Wagyu	Others	Cows for Breeding (Cow Calf Rearing)
2009	77,300	2,923,000	1,889,000	1,810,000	28,800	50,400	682,100
2010	74,400	2,892,000	1,924,000	1,853,000	26,000	44,700	683,900
% Chg.	-4	-1	2	2	-10	-11	0
2011	69,600	2,763,000	1,868,000	1,805,000	24,500	38,700	667,900
% Chg.	-6	-4	-3	-3	-6	-13	-2
2012	65,200	2,723,000	1,831,000	1,773,000	22,700	35,700	642,200
% Chg.	-6	-1	-2	-2	-7	-8	-4
2013	61,300	2,642,000	1,769,000	1,714,000	21,700	33,300	618,400
% Chg.	-6	-3	-3	-3	-4	-7	-4
2014	57,500	2,567,000	1,716,000	1,663,000	21,100	31,900	595,200
% Chg.	-6	-3	-3	-3	-3	-4	-4
2015	54,400	2,489,000	1,661,000	1,612,000	20,800	28,300	579,500
% Chg.	-5	-3	-3	-3	-1	-11	-3
2016	51,900	2,479,000	1,642,000	1,594,000	20,500	27,400	589,100
% Chg.	-5	0	-1	-1	-1	-3	2
2017	50,100	2,499,000	1,664,000	1,618,000	21,000	25,000	597,300
% Chg.	-3	1	1	2	2	-9	1
2018	48,300	2,514,000	1,701,000	1,653,000	21,800	26,500	597,300
% Chg.	-4	1	2	2	4	6	0

Source: MAFF Livestock Statistics

Beef Cattle Inventory (Part 2)

Unite: Farm/Head

Year Beginning (As of Feb. 1)	Dairy Breed Total				Average Number of Cattle Raised per Farm
	Dairy Breed Total	Holstein and Others	F-1 Crossbreed (Holstein x Wagyu)	% Share of F-1 Cross Breed in Total Dairy Breed	
2009	1,033,000	411,300	622,100	60	38
2010	968,300	421,000	547,300	57	39
% Chg.	-6	2	-12		3
2011	894,800	411,800	483,000	54	40
% Chg.	-8	-2	-12		102
2012	891,700	392,500	499,100	56	42
% Chg.	0	-5	3		5
2013	873,400	375,500	497,900	57	43
% Chg.	-2	-4	0		3
2014	851,400	367,500	483,900	57	45
% Chg.	-3	-2	-3		3
2015	827,700	345,300	482,400	58	46
% Chg.	-3	-6	0		3
2016	837,100	331,800	505,300	60	48
% Chg.	1	-4	5		4
2017	834,700	313,100	521,600	62	50
% Chg.	0	-6	3		4
2018	813,000	295,100	517,900	64	52
% Chg.	-3	-6	-1		4

Source: MAFF Livestock Statistics

Dairy Cow Inventory

Unit: Farm/Head

Year Beginning (As of Feb. 1)	Total Number of Dairy Farms	Total Number of Dairy Cows	Dairy Cows					Heifers	Animals Raised per Farm
			(Over Two Years of Age)					(Less Than Two Years of Age)	
			Total	Cow			Heifer		
			Sub Total	Milking	Dry				
2009	23,100	1,500,000	1,055,000	985,200	848,000	137,200	69,600	445,100	65
2010	21,900	1,484,000	1,029,000	963,800	829,700	134,100	65,600	454,900	68
% Chg.	-5	-1	-2	-2	-2	-2	-6	2	4
2011	21,000	1,467,000	999,600	932,900	804,700	128,200	66,700	467,800	70
% Chg.	-4	-1	-3	-3	-3	-4	2	3	3
2012	20,100	1,449,000	1,012,000	942,600	812,700	129,900	69,700	436,700	72
% Chg.	-4	-1	1	1	1	1	4	-7	3
2013	19,400	1,423,000	992,100	923,400	798,300	125,100	68,700	431,300	73
% Chg.	-3	-2	-2	-2	-2	-4	-1	-1	2
2014	18,600	1,395,000	957,800	893,400	772,500	121,000	64,400	436,800	75
% Chg.	-4	-2	-3	-3	-3	-3	-6	1	2
2015	17,700	1,371,000	934,100	869,700	750,100	119,600	64,400	437,200	78
% Chg.	-5	-2	-2	-3	-3	-1	0	0	3
2016	17,000	1,345,000	936,700	871,000	751,700	119,300	65,800	408,300	79
% Chg.	-4	-2	0	0	0	0	2	-7	2
2017	16,400	1,323,000	913,800	852,100	735,200	116,900	61,700	409,300	81
% Chg.	-4	-2	-2	-2	-2	-2	-6	0	2
2018	15,700	1,328,000	906,900	847,200	731,100	116,100	59,700	480,900	85
% Chg.	-4	0	-1	-1	-1	-1	-3	17	5

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

Source: MAFF Livestock Statistics

Table 3-B: Japanese Year Beginning Swine Inventory

National Swine Inventory Data

Unite: Farm/Head

Year Beginning (As of Feb. 1)	Number of Swine Farms		Number Raised				Average Number of Swine Raised per Farm	
		Of Farms with Breeding Sows	Total	Breeding Sows	Breeding Males	Hogs		Others
2002	10,000	8,790	9,612,000	916,400	67,900	8,028,000	599,000	961.2
2003	9,430	8,290	9,725,000	929,300	66,000	8,057,000	673,000	1031.3
2004	8,880	7,770	9,724,000	917,500	63,000	8,052,000	690,900	1095
2005	Census Year							
2006	7,800	6,780	9,620,000	907,100	60,000	7,943,000	710,700	1233.3
2007	7,550	6,560	9,759,000	915,000	58,000	8,119,000	667,100	1292.6
2008	7,230	6,250	9,745,000	910,100	57,400	8,117,000	660,900	1347.9
2009	6,890	5,930	9,899,000	936,700	57,100	8,220,000	685,700	1436.7
2010	Census Year							
2011	6,010	5,110	9,768,000	901,800	51,800	8,186,000	628,700	1625.3
2012	5,840	4,900	9,735,000	900,000	51,900	8,145,000	638,700	1667
% Chg.	-3	-4	0	0	0	-1	2	3
2013	5,570	4,620	9,685,000	899,700	49,100	8,106,000	629,500	1738.8
% Chg.	-5	-6	-1	0	-5	0	-1	4
2014	5,270	4,290	9,537,000	885,300	47,500	8,020,000	583,300	1809.7
2015	Census Year							
2016	4,830	3,940	9,313,000	844,700	42,600	7,743,000	682,500	1,928.20
2017	4,670	3,800	9,346,000	839,300	43,500	7,797,000	666,100	2,001.30
% Chg.	-3	-4	0	-1	2	1	-2	4
2018	4,470	3,640	9,189,000	823,700	39,400	7,677,000	649,600	2,056
% Chg.	-4	-4	-2	-2	-9	-2	-2	3

Source: MAFF Livestock Statistics