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Report Highlights:

FAS/Tokyo projects 2023 cattle stocks to expand to 3.995 million metric tons (MT) following increased production in 2021 and 2022. In the dairy sector, cow slaughter continues to increase in 2022 to adjust for excess capacity and overproduction of milk. FAS/Tokyo forecasts 2023 beef production to remain flat from 2022 at 490,000 MT. Food service demand is slowly recovering from COVID-19 related demand shocks, but higher retail prices for beef imports are shifting some consumption from beef to pork. FAS/Tokyo projects Japan's 2023 pork production to increase to 1.305 million MT and for imports to remain flat at 1.485 million MT.

Million metric tons = MMT

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Cattle and Beef

Table 1: Cattle Production Supply and Distribution

Animal Numbers, Cattle	2021		2022		2023	
Market Year Begins	Jan 2021		Jan 2022		Jan 2023	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Cattle Beg. Stocks (1000 HEAD)	3960	3960	3990	3990	0	3995
Dairy Cows Beg. Stocks (1000 HEAD)	849	849	860	862	0	860
Beef Cows Beg. Stocks (1000 HEAD)	567	567	570	575	0	575
Production (Calf Crop) (1000 HEAD)	1250	1250	1260	1255	0	1250
Total Imports (1000 HEAD)	13	13	10	10	0	13
Total Supply (1000 HEAD)	5223	5223	5260	5255	0	5258
Total Exports (1000 HEAD)	0	0	0	0	0	0
Cow Slaughter (1000 HEAD)	255	255	255	265	0	255
Calf Slaughter (1000 HEAD)	4	4	5	5	0	5
Other Slaughter (1000 HEAD)	797	797	815	810	0	820
Total Slaughter (1000 HEAD)	1056	1056	1075	1080	0	1080
Loss and Residual (1000 HEAD)	177	177	182	180	0	180
Ending Inventories (1000 HEAD)	3990	3990	4003	3995	0	3998
Total Distribution (1000 HEAD)	5223	5223	5260	5255	0	5258
(1000 HEAD)						

Table 2: Beef and Veal Production Supply and Distribution

Meat, Beef and Veal	2021		2022		2023	
Market Year Begins	Jan 2021		Jan 2022		Jan 2023	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference) (1000 HEAD)	1056	1056	1075	1080	0	1080
Beginning Stocks (1000 MT CWE)	169	169	182	182	0	197
Production (1000 MT CWE)	480	478	490	490	0	490
Total Imports (1000 MT CWE)	807	807	810	790	0	795
Total Supply (1000 MT CWE)	1456	1454	1482	1462	0	1482
Total Exports (1000 MT CWE)	11	11	10	10	0	10
Human Dom. Consumption (1000 MT CWE)	1263	1261	1282	1255	0	1277
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	1263	1261	1282	1255	0	1277
Ending Stocks (1000 MT CWE)	182	182	190	197	0	195
Total Distribution (1000 MT CWE)	1456	1454	1482	1462	0	1482
(1000 HEAD) ,(1000 MT carcass weight equivalence [CWE])						

Production

FAS/Tokyo projects 2023 cattle beginning stocks to increase to 3.995 million head (Table 1), as producers increased 2021 and 2022 calf production with support from a Ministry of Agriculture, Forestry and Fisheries (MAFF) incentive program for producers to introduce new breeding cows and heifers (JA2019-0212). FAS/Tokyo forecasts 2023 dairy cow beginning stocks to drop to 860,000 head, as producers, in response to excess milk supply, continue a trend started in late 2021 of increased slaughter of older cows.

FAS/Tokyo increases the 2022 total slaughter estimate to 1.080 million from our previous projection and forecasts that the 2023 slaughter forecast will remain stable. FAS/Tokyo raised the 2022 slaughter estimate as January-May 2022 slaughters jumped 3 percent year over year, which is greater than our previous production in Livestock and Products Semi-annual published in March. Dairy and cross breed cows/heifer slaughters were up 8 percent and cross breed steers/bulls were up 7 percent up (Table 3). Based on current cattle ages, FAS/Tokyo estimates that the 2022 slaughter of black hair wagyu and cross breed will increase while the Holstein steer/bull slaughter will decline (Table 4). FAS/Tokyo forecasts that, based on current cattle age, the 2023 slaughter number of black hair wagyu and cross breeds will increase by 2 percent (Table 5) but will be offset by declines in dairy cow slaughter after larger slaughter numbers over the last 2 years.

Table 3: Japan January- May Slaughter Numbers (2021-2022)

Slaughtered number (head) (January - May)	Wagyu		Dairy		Cross		Other	Calf	Total
	steer/ bull	heifer/ cow	steer/ bull	heifer/ cow	steer/ bull	heifer/cow			
2021	101,247	84,301	64,086	68,674	47,915	42,904	5,822	1,628	416,577
2022	102,465	85,962	59,642	74,265	51,175	46,311	5,652	1,948	427,420
Change	1%	2%	-7%	8%	7%	8%	-3%	20%	3%

Source: MAFF

Table 4: Japan Beef Cattle within Age Range for Slaughtering in June- December 2022

	Black Hair Wagyu	Holstein (steer/bull)	Cross breed
Targeted Slaughter Age	***27 months***	***17 months***	***24 months***
Cattle Age (As of May 31)	20 - 26 months	10 - 16 months	17 – 23 months
2021	294,776	80,144	140,269
2022	298,257	77,635	155,129
Change	1.2%	-3.1%	10.6%

Source: FAS/Tokyo based on data from the National Livestock Breeding Center

Table 5: Japan Beef Cattle within Age Range for Slaughtering in 2023

	Black Hair Wagyu	Holstein (steer/bull)	Cross breed
Targeted Slaughter Age	***27 months***	***17 months***	***24 months***
Cattle Age (As of May 31)	8 - 19 months	0 - 9 months	5 - 16 months
2021	499,308	115,205	251,822
2022	509,448	115,105	257,464
Change	2.0%	-0.1%	2.2%

Source: FAS/Tokyo based on data from the National Livestock Breeding Center

As of February 1, according to MAFF, the total number of cattle farms in Japan has decreased by 4 percent from 2021 (Table 6). Small and medium sized operations rearing fewer than 100 heads of cattle continued to exit the market, but the number of larger farms and the total cattle number increased. The closing and consolidation of smaller farms accelerated as production costs surged.

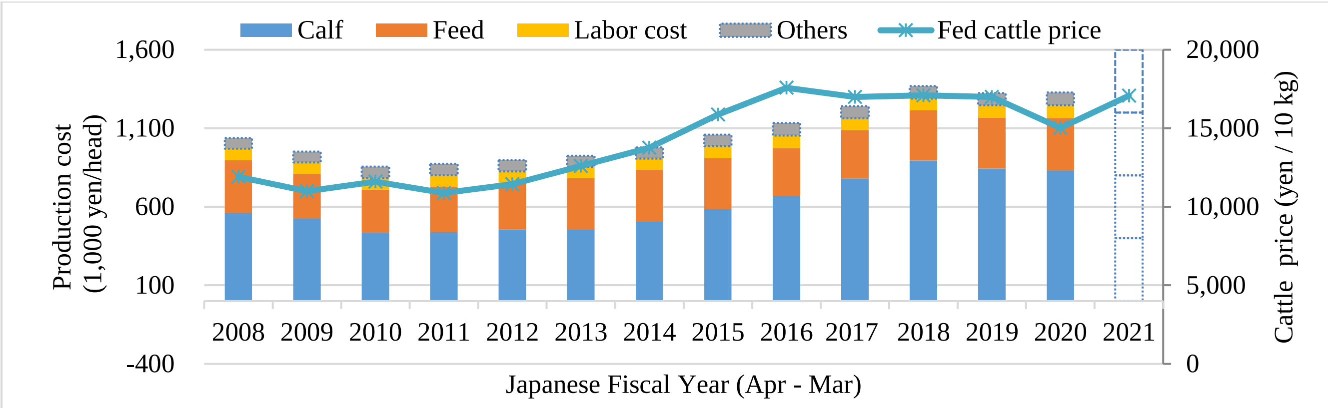
Table 6: Number of Beef Operators and Beef Cattle in Japan

	Year (as of February 1)	Number of Cattle on Farm (Unit: head)				Total
		1 - 19	20 - 99	100 - 199	200 and more	
Number of farm (Unit: operation)	2021	25,730	11,960	2,210	2,184	42,084
	2022	24,260	11,680	2,220	2,213	40,373
	Change	*-5.7%*	*-2.3%*	*0.5%*	*1.3%*	*-4.1%*
Cattle population (Unit: head)	2021	199,000	555,400	322,000	1,528,000	2,604,400
	2022	185,800	535,400	320,000	1,572,700	2,613,900
	Change	*-6.6%*	*-3.6%*	*-0.6%*	*2.9%*	*0.4%*

Source: MAFF

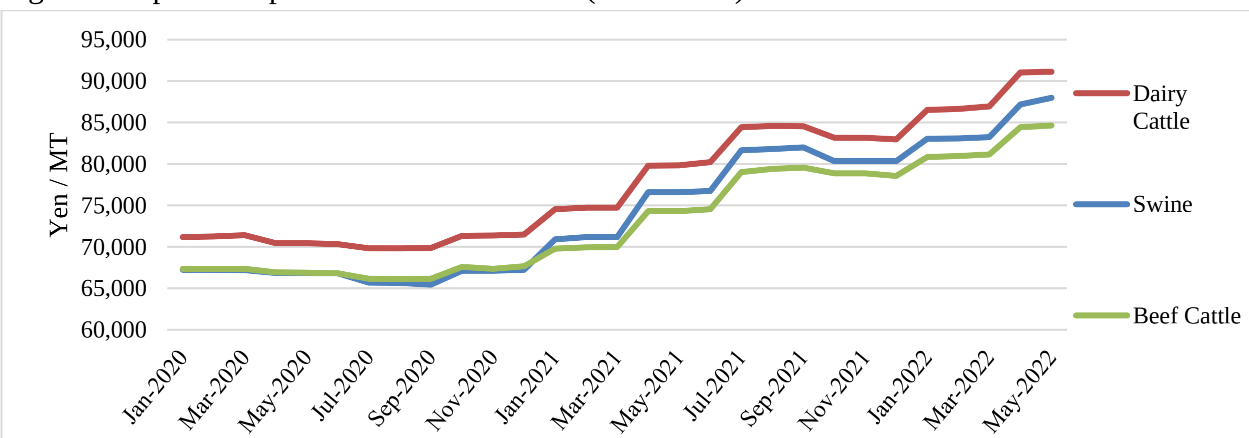
According to MAFF production cost data, from Japanese Fiscal Year (JFY, April 1 - March 31) 2019 to 2020, despite a decline in the cost of calves which is typically the largest cattle production cost, overall farm management costs for wagyu producers increased, driven by spiraling feed prices (Figure 1). Retail compound feed prices have trended upwards since late 2020 and continued to rise through May 2022 (Figure 2). The Compound Feed Price Stabilization System, a support payment for cattle farms, has been in effect since the fourth quarter of JFY2020 (see JA2022-0024). In addition to price concerns, cattle feeders are also facing disruptions to availability and on time delivery of some feed types.

Figure 1: Japan Fed Wagyu Steer Production Cost and Selling Price (2008-2021)



Note: 2021 Production Costs are not Available at Publication.
Source: MAFF and Agriculture and Livestock Industries Corporation (ALIC)

Figure 2: Japan Compound Feed Retail Price (2020-2022)

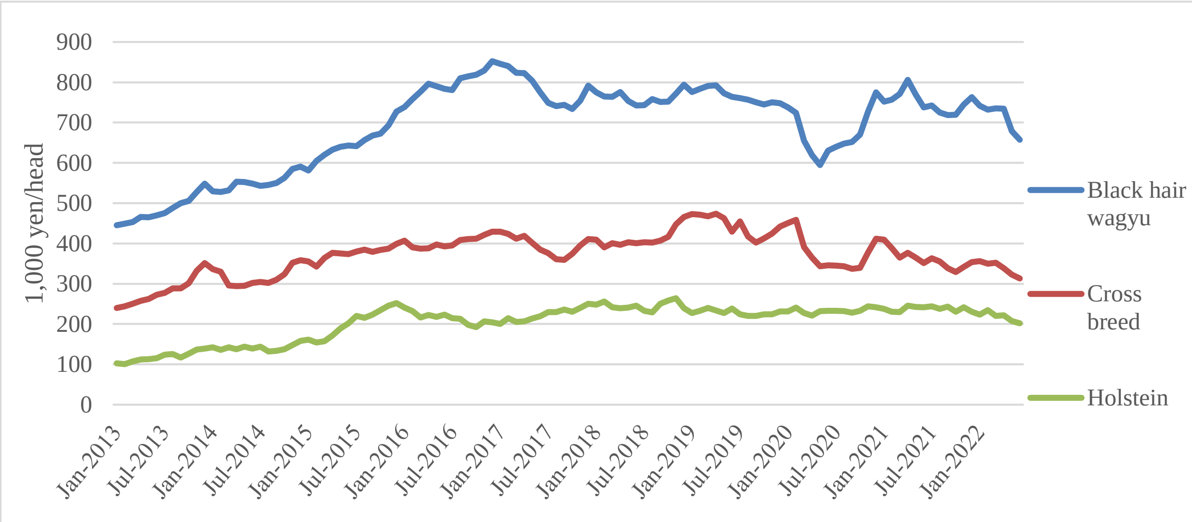


Source: MAFF

As a countermeasure to increasing production costs, dairy farmers increased beef calf production through black wagyu semen and black wagyu embryo transfer technology, expecting higher market prices for wagyu calves. In June 2022, the price of black hair wagyu calves was 225 percent higher and cross breed calves were 55 percent higher than Holstein calves (Figure 3).

FAS/Tokyo estimates that the greater calf supply from dairy farms will extend the current trend of lower beef calf prices. Cattle fattening operations will in turn be able to replace and increase their herd at lower prices, offsetting high feed costs, and resulting in year over year increases to herds in 2023.

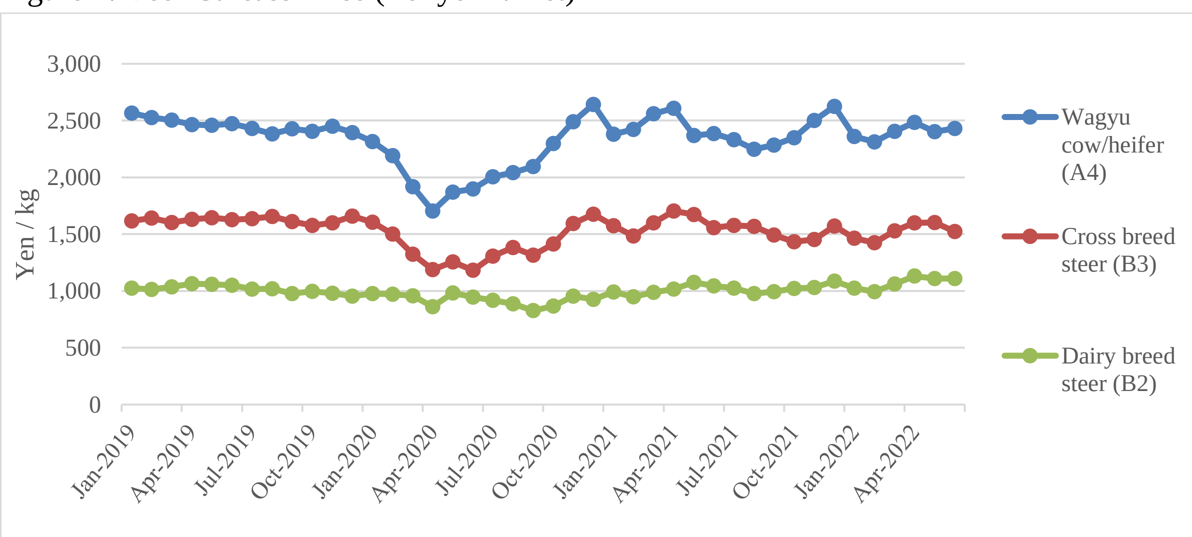
Figure 3: Japan Beef Calf Market Price (male/female average)



Source: ALIC

Carcass prices are stable after rebounding from the large drop in April 2020, enabling many producers to turn a profit (Figure 4). ALIC has not activated the Beef Livestock Stabilization Program, also known as [Beef *Marukin*] (see [JA2020-0071]), for black hair wagyu from October 2021 through May 2022 (Supplemental Table 6.)

Figure 4: Beef Carcass Price (Tokyo market)



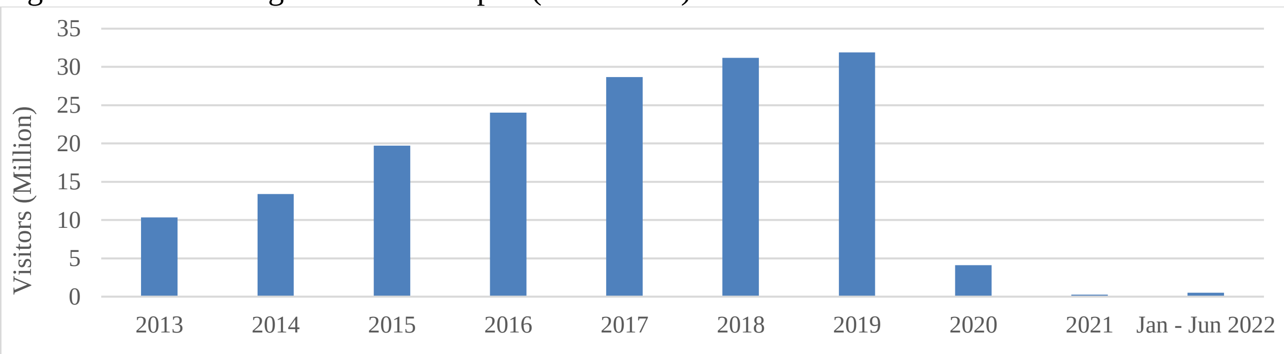
Source: ALIC

Consumption

FAS/Tokyo projects that 2023 beef consumption will increase to 1.277 MMT after a dip in 2022 as restaurant, and institutional (HRI) demand recovers when international tourism resumes (Figure 5). FAS/Tokyo decreases the 2022 beef consumption estimate as retail demand reacts to higher, inflationary prices.

As of August 1, the government of Japan is not implementing any COVID-19 countermeasures for the HRI-food service industries. Previous restrictions limited business hours and alcohol service at restaurants and bars during various stages of the pandemic. The government has eased border controls to receive up to 20,000 foreign visitors a day and restarted visa issuance for selected categories, including limited tourism (For details see MOFA).

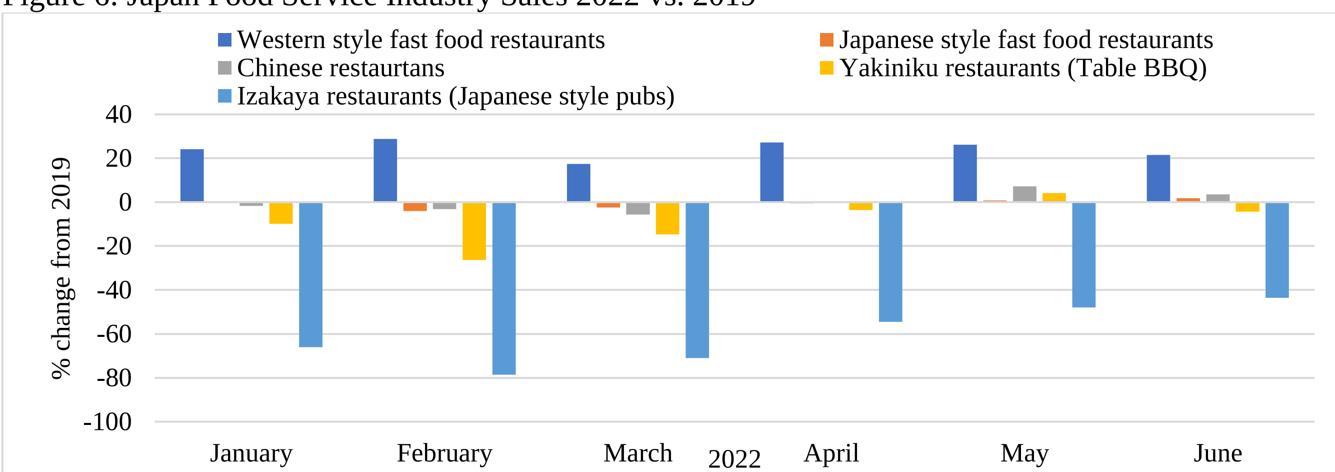
Figure 5: Total Foreign Visitors to Japan (2013-2022)



Source: Japan Tourism Statistics

Despite industry expectations, HRI demand, accounting for 60 percent of total beef consumption in Japan, has not recovered to pre-COVID-19 levels (Figure 6). Western style fast food restaurants, especially burger chains, continue to increase their sales despite production costs driving increased product prices. In May 2022, sales at *Yakiniku* restaurants, table style BBQ restaurants, surpassed 2019 sales as domestic tourism and restaurant dining has rebounded. Industry reports that at *Izakaya*, Japanese-style pubs and eateries, sales remain considerably lower than pre-COVID levels as consumers remain cautious about virus transmission in bars and pubs.

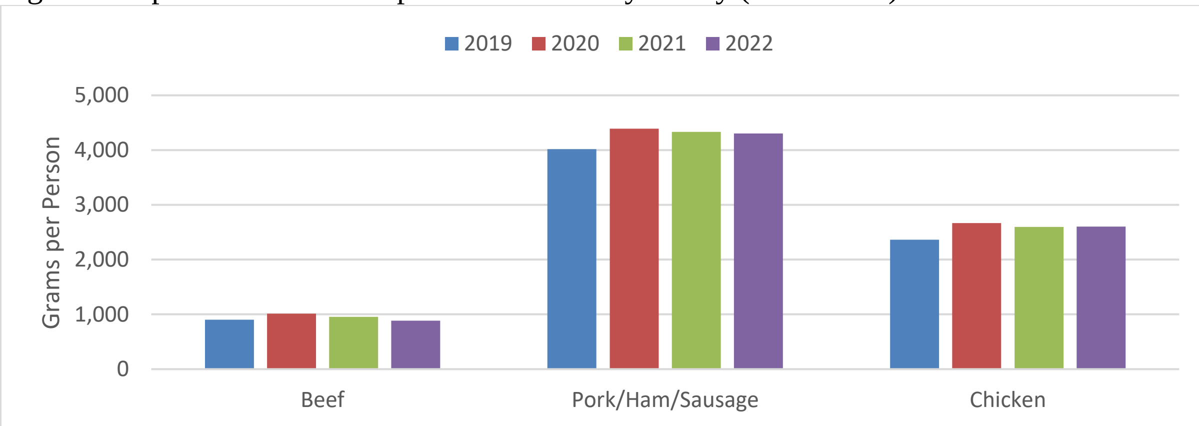
Figure 6: Japan Food Service Industry Sales 2022 vs. 2019



Source: Food Service Association

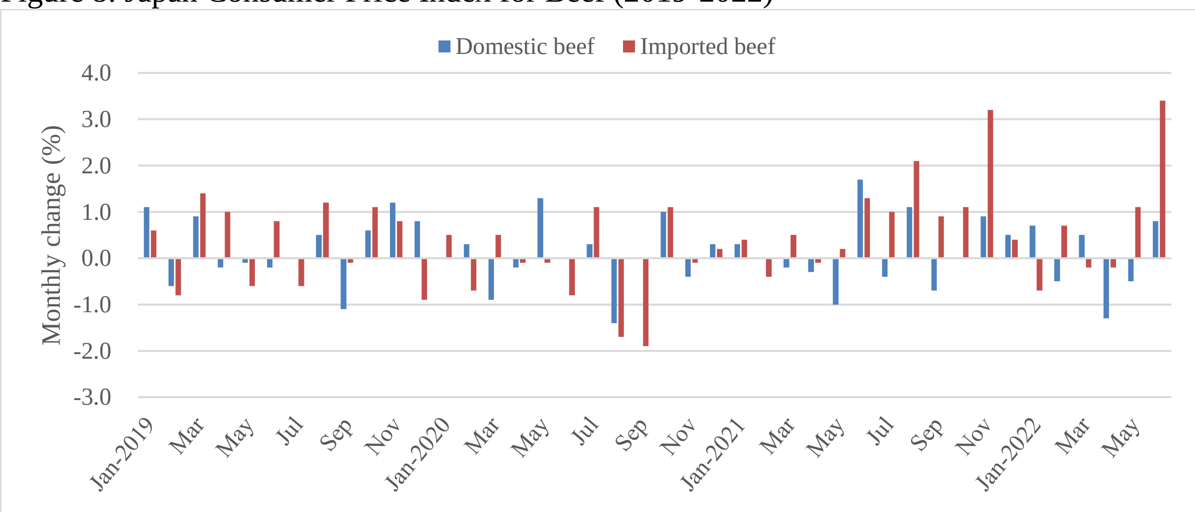
Retail beef consumption, which accounts for 30 percent of total beef consumption, decreased in the first months of 2022 compared to 2021 (Figure 7). Consumption lagged as surging import costs pushed up retail prices from July through December 2021 (Figure 8). In addition, a weak yen further increased the price of imports in May and June 2022 (Figures 8 and 9). FAS/Tokyo forecasts that this consumption trend will continue through early 2023.

Figure 7: Japan Retail Consumption from January – May (2019-2022)



Source: Ministry of Internal Affairs and Communications=

Figure 8: Japan Consumer Price Index for Beef (2019-2022)



Source: Statistic Bureau of Japan

Trade

FAS/Tokyo forecasts that 2023 beef imports will increase on strong demand for frozen beef. FAS/Tokyo lowered the 2022 import estimate based on January through June 2022 data, reflecting weak retail demand for chilled beef.

Imports from January through June 2022 were down 3 percent, led by a 13 percent drop from Australia and an 6percent drop from United States (Table 7). According to Meat & Livestock Australia (MLA), Australia continues to rebuild its herd and labor shortages have limited beef production. For U.S. beef, Japanese importers have adjusted purchasing volumes, especially for chilled beef, to reflect actual demand in Japan considering surging U.S. prices. Imports from the EU, Mexico and New Zealand were up as Japanese importers seek to diversify their trading partners.

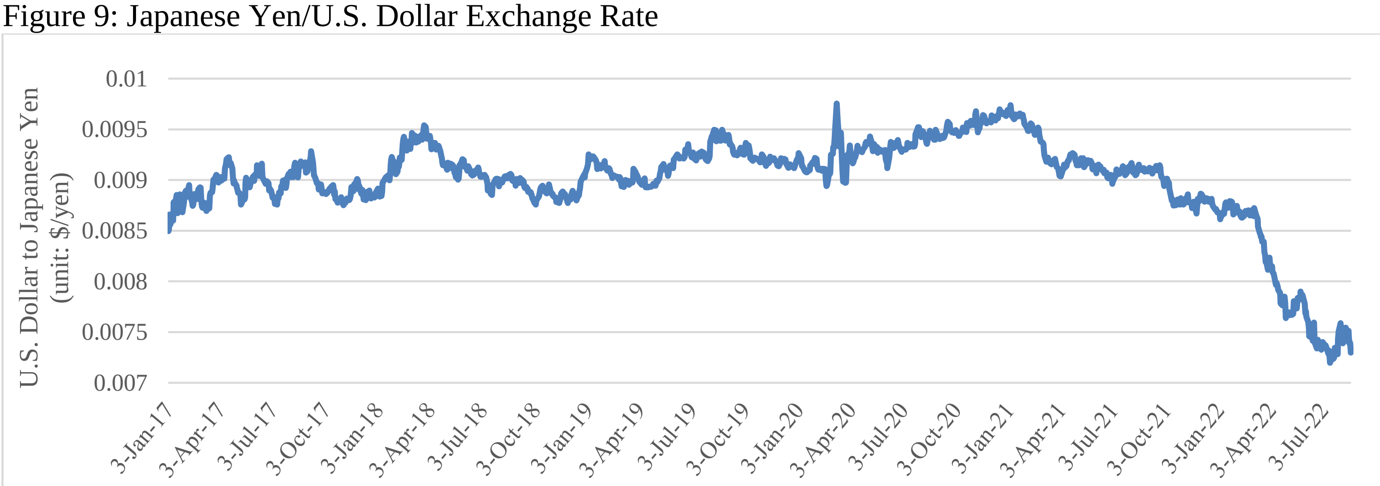
Table 7: Japan Beef Imports January- June (2021-2022) Unit: MT (CWE)

	January - June		
	2021	2022	Change
Total	***392,860***	***382,499***	***-3%***
Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)	225,745	217,094	***-4%***
Australia	*165,224*	*144,453*	***-13%***
Canada	*31,463*	*29,989*	***-5%***
New Zealand	*17,100*	*21,317*	***25%***
Mexico	*11,912*	*21,335*	***79%***
United States	159,872	149,753	***-6%***
European Union (EU)	4,358	8,066	***85%***
Uruguay	1,946	4,669	***140%***
United Kingdom	376	2174	***478%***
Other	563	743	***32%***

Source: Japan Customs

Global economic conditions continue to dampen imports as global supply chains remain unstable and freight and product costs remain high. The sharp depreciation of the yen is also hampering imports. In mid-July, the yen dropped against the U.S. dollar by around 18% from the middle of March (Figure 9).

Figure 9: Japanese Yen/U.S. Dollar Exchange Rate

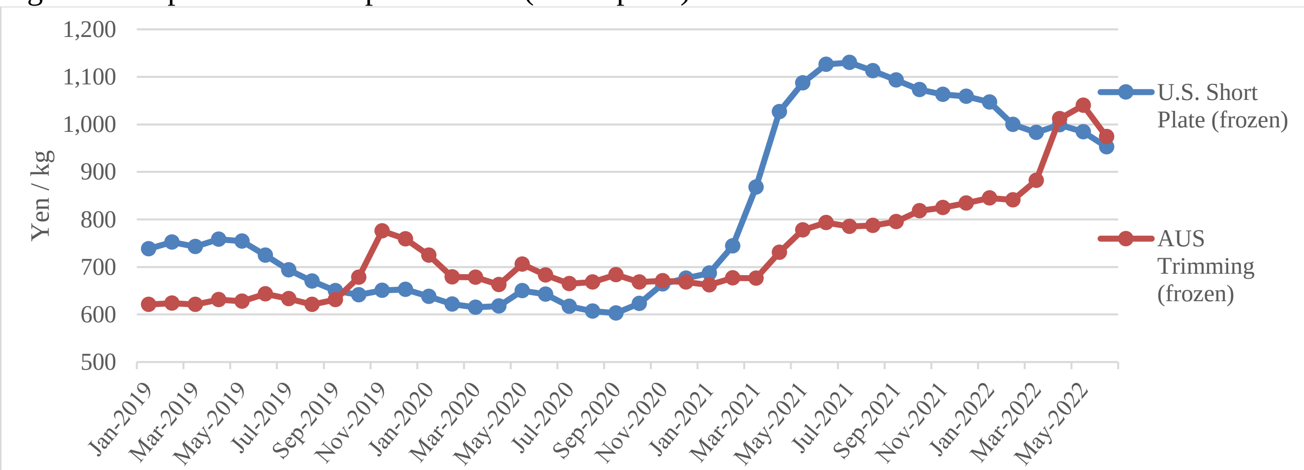


Source: Board of Governors of the Federal Reserve System

Imports of chilled beef, favored at retail, are stagnate as consumers look for less-expensive protein options. Over the first half year of 2022, chilled beef imports were down 15 percent from the same period in 2021. In contrast, frozen beef imports were up 8 percent overall, up 5 percent up from the United States and down 3 percent from Australia. Imported frozen beef prices began climbing in late

2020, with U.S. short plate hitting historic highs in summer 2021 and Australian trimming doing the same in Spring 2022. U.S. frozen short plate prices have dropped since but still sit considerably higher than the 2020 average price (Figure 10). Japanese style fast food, beef bowl restaurants that use frozen short plate are seeing recovering sales, which FAS projects will help drive increased frozen beef imports in 2022 and 2023 (Figure 6).

Figure 10: Japan Price of Imported Beef (trader price)



Source: ALIC

FAS/Tokyo projects that 2022 and 2023 beef exports will be below 2021 exports. Exports to leading Asian markets, such as Hong Kong, are sensitive to ongoing COVID-19 countermeasures which limit HRI consumption. From January through June 2022, exports to Hong Kong decreased by 2 percent (Table 8).

Table 8: Japan Beef Exports January-June (2021-2022) Unit: MT (CWE)

	January - June		
	2021	2022	Change
Total	***4,787***	***4,447***	***-7%***
CPTPP	567	739	***30%***
Singapore	*289*	*390*	***35%***
Malaysia	*111*	*135*	***22%***
Hong Kong	983	963	***-2%***
Taiwan	576	653	***13%***
United States	699	719	***3%***
EU	132	269	***104%***
Other	1,830	1,104	***-40%***

Source: Japan Customs

Swine and Pork

Table 9: Swine Production Supply and Distribution

Animal Numbers, Swine	2021		2022		2023	
Market Year Begins	Jan 2021		Jan 2022		Jan 2023	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Total Beginning Stocks (1000 HEAD)	9290	9290	9074	8949	0	8945
Sow Beginning Stocks (1000 HEAD)	823	823	830	789	0	800
Production (Pig Crop) (1000 HEAD)	17000	17000	17150	16800	0	16900
Total Imports (1000 HEAD)	1	1	2	1	0	2
Total Supply (1000 HEAD)	26291	26291	26226	25750	0	25847
Total Exports (1000 HEAD)	0	0	0	0	0	0
Sow Slaughter (1000 HEAD)	0	0	0	0	0	0
Other Slaughter (1000 HEAD)	16837	16837	16835	16550	0	16650
Total Slaughter (1000 HEAD)	16837	16837	16835	16550	0	16650
Loss and Residual (1000 HEAD)	380	505	215	255	0	202
Ending Inventories (1000 HEAD)	9074	8949	9176	8945	0	8995
Total Distribution (1000 HEAD)	26291	26291	26226	25750	0	25847
(1000 HEAD)						

Table 10: Pork Production, Supply and Distribution

Meat, Swine	2021		2022		2023	
Market Year Begins	Jan 2021		Jan 2022		Jan 2023	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Slaughter (Reference) (1000 HEAD)	16837	16837	16835	16550	0	16650
Beginning Stocks (1000 MT CWE)	245	245	219	219	0	225
Production (1000 MT CWE)	1318	1318	1315	1300	0	1305
Total Imports (1000 MT CWE)	1420	1420	1475	1485	0	1485
Total Supply (1000 MT CWE)	2983	2983	3009	3004	0	3015
Total Exports (1000 MT CWE)	4	4	4	3	0	3
Human Dom. Consumption (1000 MT CWE)	2760	2760	2775	2776	0	2790
Other Use, Losses (1000 MT CWE)	0	0	0	0	0	0
Total Dom. Consumption (1000 MT CWE)	2760	2760	2775	2776	0	2790
Ending Stocks (1000 MT CWE)	219	219	230	225	0	222
Total Distribution (1000 MT CWE)	2983	2983	3009	3004	0	3015
(1000 HEAD) ,(1000 MT CWE)						

Production

FAS/Tokyo forecasts Japan’s 2023 beginning swine herd to be 8.945 million head (Table 9), down slightly from 2022. From late 2021 through June 2022 authorities detected sporadic cases of classical swine fever (CSF) in 12 prefectures, accounting for 37 percent of Japan’s total swine production, including Gunma and Chiba, the 4th and 5th largest swine producing prefectures. As a result, producers culled 148,000 swine. Reflecting the CSF outbreak and a slowdown of the introduction of new sows, FAS/Tokyo increased the 2021 Loss and Residual estimate, and accordingly reduced the 2021 ending stocks and 2022 sow beginning stocks estimate to 789,000. Fewer sows and ongoing global freight congestion limited beginning stocks and production.

MAFF statistics also show a drop in 2022 total beginning stocks as well as a 4 percent decline in sow beginning stocks from 2021 (Supplemental Table 5). The total number of hog operations, across all size categories, decreased from 2021 to 2022, which partially reflects a time lag in producer introduction of new sows after CSF detections (Table 11). Surging production costs accelerated the exit of small-scale operations from the market, with some larger farms consolidating smaller farms into their operations. In 2022, the average operation size was up 3 percent from 2021. Industry anticipates large-scale farms will successfully weather current high operating costs, particularly feed costs, taking advantage of integrated production systems from feed through slaughtering.

Table 11: Japan Number of Integrated Hog Operations by Sow Population (2021-2022)

	Number of Operations					
Sow Population (Head)	*1 - 9*	*10 - 29*	*30 - 49*	*50 – 99*	*100 - 199*	*200 or more*
2021	185	272	238	564	616	1030
2022	170	224	228	488	585	923
Change	-8.1%	-17.6%	-4.2%	-13.5%	-5.0%	-10.4%

Source: MAFF

FAS/Tokyo projects 2023 hog slaughter will increase roughly 1 percent and pork production will increase only slightly, following a drop in 2022 pig production (Table 10). Slaughter from January through June 2022 was down 1 percent down from 2021 (Table 12), and projected shipping speeds for slaughter will be even slower in the second half of the year.

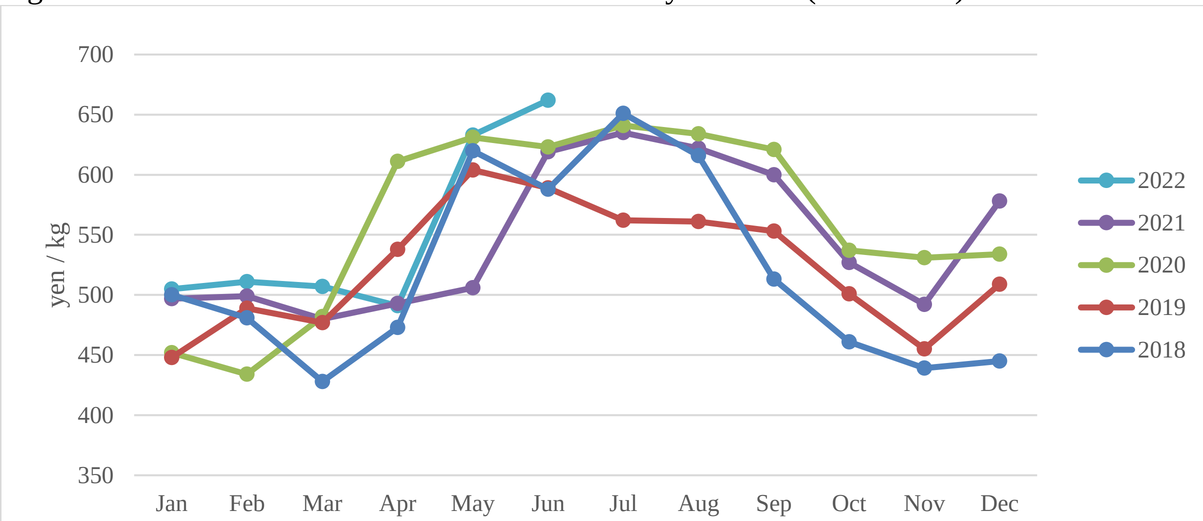
Table 12: Japan Swine Slaughter and Pork Production (2021-2022)

January - June	Slaughter (head)	Production (CWE, MT)	Average carcass weight (kg)
2021	8,377,851	661,998	79.0
2022	8,309,954	654,667	78.8
% Change	-1%	-1%	0%

Source: MAFF

In March, the carcass market price jumped, reflecting strong retail demand for domestic pork and stagnant production (Figure 11).

Figure 11: Carcass Price for Grade Excellent at Tokyo Market (2018-2022)



Source: ALIC

Consumption

FAS/Tokyo projects that 2023 pork consumption will increase to 2.790 MMT and revises the 2022 consumption estimate upwards to 2.776 MMT, as consumers choose less-expensive animal proteins. Like beef consumption, FAS/Japan forecasts a rebound in pork consumption when the Government of Japan lifts ongoing travel restrictions.

Household pork consumption, which accounts for 50 percent of total consumption, remains strong and drove total consumption over the first 5 months of 2022 above consumption rates for the same, pre-COVID, period in 2019. Industry anticipates consumer demand for pork to remain high as inflation drives consumers to increase pork consumption in lieu of beef to save on costs through the second half year of 2022 and 2023. In retail outlets, domestic pork has been competitive against imported product but increasing carcass prices for domestic hogs is starting to take its toll on competitiveness.

HRI pork consumption, accounting for 27 percent of total consumption, recovered after COVID-19 limited overall HRI consumption. From April through June, Chinese restaurant sales rebounded and even surpassed 2019 sales over the same period. Japanese pork bowl and *Tonkatsu* (pork cutlets) restaurants also increased their sales in the same period. While telework and other flexible working styles have persisted in some employment sectors, more workers have returned to the office, spurring increased restaurants sales in business districts.

Trade

FAS/Tokyo projects that 2023 Japan pork imports will remain stable as importers increase imports of frozen pork to build larger stocks and to offset declining chilled pork imports and domestic production. FAS/Tokyo increases the 2022 imports estimate as January through June data shows imports up 10 percent, led by a rebound of frozen pork imports from Europe as prices for Spanish and Danish pork declined (Table 13 and Figure 12). Imported, frozen pork is used mainly by food processors, accounting for 23 percent of Japan’s total pork consumption, and the stable demand for processed products, such as sausage and ham, accelerated imports.

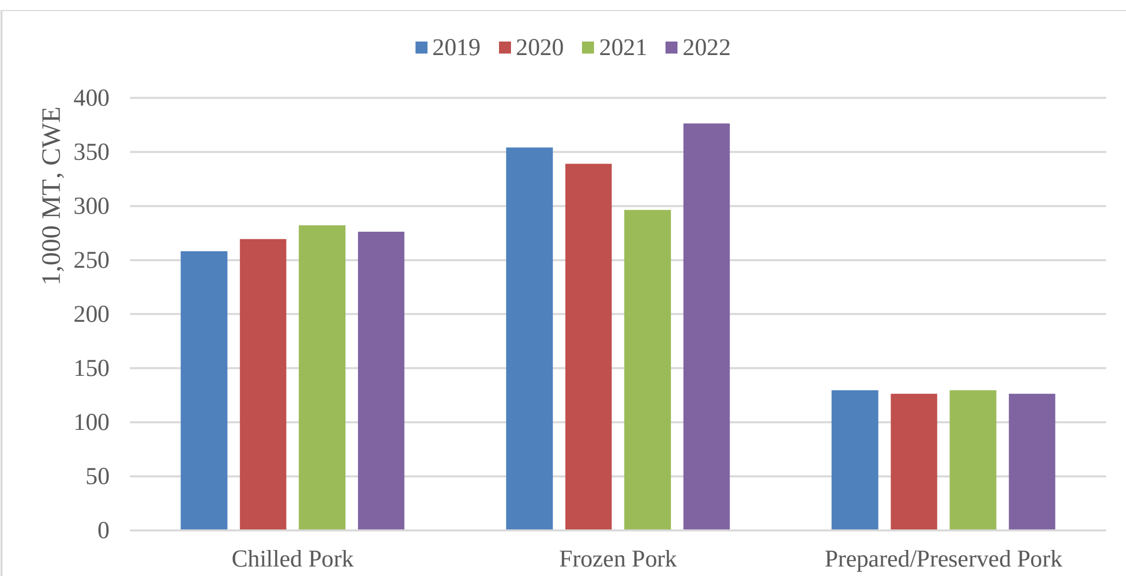
Japanese importers are limiting imports of chilled pork to meet current demand as prices for imported, chilled pork from the U.S. and Canada have remained high since 2021. Despite persistently high prices and importers following conservative import strategies, imports from January through June 2022 surpassed pre-COVID 2019 import numbers (Figure 12). Retail outlets favor imported, chilled pork and typically use it to fill the supply gap when domestic production cannot meet retail demand. FAS/Tokyo forecasts that 2023 chilled pork imports will remain stable from 2022.

Table 13: Japan Pork Imports (January - June) Unit: MT (CWE)

	January-June		
	2021	2022	Change
Total	***708,090***	***778,610***	***10%***
United States	256,996	237,641	-8%
TPP	257,318	259,540	1%
Canada	*159,926*	*148,216*	*-7%*
Mexico	*76,250*	*90,516*	*19%*
EU	178,324	258,008	45%
Spain	*64,386*	*123,248*	*91%*
Denmark	*58611*	*71331*	*22%*
Netherland	*27316*	*30198*	*11%*
Other	15,452	23,421	52%

Source: Japan Customs

Figure 12: Japan Pork Imports in January – June (2019-2022)



Source: Japan Customs

Supplemental Tables

Supplemental Table 1: Japan Beef Ending Stock Estimate Unit: Metric Ton (CWE Converted)

Month / Year	2017	2018	% Chg.	2019	% Chg.	2020	% Chg.	2021	% Chg.	2022	% Chg.
Jan	143,120	145,222	1	166,097	14	170,359	3	171,802	1	182,940	6
Feb	140,213	141,490	1	165,995	17	165,749	0	170,091	3	181,540	7
Mar	139,798	132,692	-5	157,678	19	172,506	9	159,766	-7	173,842	9
Apr	139,784	133,944	-4	159,384	19	193,102	21	159,966	-17	171,378	7
May	143,260	141,770	-1	162,872	15	200,967	23	167,597	-17	177,948	6
Jun	147,364	144,991	-2	168,814	16	200,536	19	173,796	-13		
Jul	154,587	157,277	2	179,381	14	195,943	9	177,329	-9		
Aug	157,798	167,662	6	177,835	6	193,807	9	183,294	-5		
Sep	162,039	166,914	3	178,016	7	184,961	4	194,166	5		
Oct	160,948	167,644	4	179,936	7	181,011	1	200,691	11		
Nov	159,780	171,025	7	168,524	-1	173,552	3	190,873	10		
Dec	151,303	162,884	8	161,541	-1	169,323	5	182,080	8		

Sources: ALIC

Supplemental Table 2: Japan Pork Ending Stock Estimate Unit: Metric Ton (CWE Converted)

Month / Year	2017	2018	% Chg.	2019	% Chg.	2020	% Chg.	2021	% Chg.	2022	% Chg.
Jan	228,337	229,785	1	213,056	-7	271,976	28	237,333	-13	230,454	-3
Feb	222,435	236,361	6	216,990	-8	270,555	25	239,556	-11	232,955	-3
Mar	230,775	235,266	2	216,436	-8	273,178	26	236,579	-13	234,124	-1
Apr	226,226	231,356	2	246,696	7	291,129	18	240,027	-18	249,876	4
May	236,863	234,372	-1	268,588	15	306,465	14	241,118	-21	259,221	8
Jun	235,581	232,077	-1	269,469	16	305,595	13	244,048	-20		
Jul	228,890	228,848	0	278,667	22	293,088	5	239,940	-18		
Aug	230,182	228,839	-1	286,966	25	287,101	0	244,999	-15		
Sep	222,369	217,827	-2	283,667	30	276,992	-2	243,645	-12		
Oct	217,122	215,679	-1	284,658	32	265,444	-7	237,649	-10		
Nov	220,510	212,442	-4	276,873	30	253,486	-8	229,262	-10		
Dec	222,074	208,469	-6	262,958	26	244,804	-7	219,164	-10		

Source: ALIC

Supplemental Table 3: Japan Beef Cattle Inventory Unit: 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)
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
2019	46,300	2,503,000	1,734,000	1,683,000	22,200	28,900	625,900
% Chg.	-4	0	2	2	2	9	5
2020	43,900	2,555,000	1,792,000	1,735,000	23,300	33,500	558,700
% Chg.	-5	2	3	3	5	16	-11
2021	42,100	2,604,000	1,829,000	1,772,000	23,100	33,800	567,000
%Chg.	-4	2	2	2	-1	1	1
2022	40,400	2,614,000	1,812,000	1,758,000	23,000	31,300	574,600
% Chg.	-4	0	-1	-1	0	-7	1

Note: The numbers are based on Japan's Individual Identification Information of Cattle since 2020.
Source: MAFF Livestock Statistics

Japan Beef Cattle Inventory cont'd Unit: 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	
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
2019	768,600	274,400	494,200	64	54
% Chg.	-5	-7	-5		4
2020	763,400	267,900	495,400	65	58
% Chg.	-1	-2	0		8
2021	775,200	249,400	525,700	68	62
% Chg.	2	-7	6		6
2022	802,200	246,900	555,300	69	65
% Cg.	3	-1	6	2	5

Note: The numbers are based on Japan's Individual Identification Information of Cattle since 2020.
Source: MAFF Livestock Statistics

Supplemental Table 4: Japan Dairy Cow Inventory Unit: Farm/Head

Year Beginning (As of Feb. 1)	Total Number of Dairy Farms	Total Number of Dairy Cows	Dairy Cows (Over Two Years of Age)					Heifers (Less Than Two Years of Age)	Animals Raised per Farm
			Total	Cow			Heifer		
				Sub Total	Milking	Dry			
2012	20,100	1,449,000	1,012,000	942,600	812,700	129,900	69,700	436,700	72
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	421,100	85
% Chg.	-4	0	-1	-1	-1	-1	-3	3	5
2019	15,000	1,332,000	900,500	839,200	729,500	109,700	61,300	431,100	89
% Chg.	-4	0	-1	-1	0	-6	3	2	5
2020	14,400	1,352,000	900,700	839,600	716,000	123,600	61,100	451,600	94
% Chg.	-4	2	0	0	-2	13	0	5	6
2021	13,900	1,356,000	910,000	849,300	726,000	123,300	60,700	446,400	98
% Chg.	-3	0	1	1	1	0	-1	-1	4
2022	13,300	1,371,000	924,000	861,700	736,500	125,200	62,300	447,200	103
% Chg.	-4	1	2	1	1	2	3	0	6

Note: 99 percent of dairy cows raised in Japan are Holstein breed.
Source: MAFF Livestock Statistics

Supplemental Table 5: Japan Swine Inventory Unit: 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	
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
2019	4,320	3,460	9,156,000	853,100	36,300	7,594,000	673,200	2,119
% Chg.	-3	-5	0	4	-8	-1	4	3
2020	Census Year							
2021	3,850	3,040	9,290,000	823,200	32,000	7,676,000	758,800	2,413
2022	3,590	2,750	8,949,000	789,100	30,000	7,515,000	615,400	2,493
% Chg.	-7	-10	-4	-4	-6	-2	-19	3

Source: MAFF Livestock Statistics

Supplemental Table 6: Japan Beef *Marukin* Payments (Continued on next page)

		Prefectures Applied	Wagyu		Cross breed	Dairy
			Lowest payment	Highest payment		
2018	Dec	0	N/A	N/A	-	39,700
2019	Jan	11	3,966	159,811	-	54,379
	Feb	8	8,315	87,492	-	4,69.4
	Mar	11	1,773	86,398	-	74,024
	Apr	1	-	17,067	-	42,722
	May	11	4,739	31,689	-	30,806
	Jun	4	4,014	50,013	-	31,029
	Jul	11	308	50,163	-	35,702
	Aug	24	174	79,302	-	26,906
	Sep	21	2,757	88,939	-	28,826
	Oct	21	5,660	69,293	15,271	48,722
	Nov	9	1,812	99,875	356	53,726
	Dec	16	2,237	62,574	-	63,042
2020	Jan	17	2,642	138,966	-	47,339
	Feb	30	609	152,529	24,129	39,319
	Mar	47	52,835	295,419	116,716	54,563
	Apr	47	121,079	468,145	144,130	48,145
	May	47	92,851	306,934	142,220	42,925
	Jun	46	76,555	236,813	190,413	48,078
	Jul	43	22,789	233,821	180,387	39,031
	Aug	46	36,643	225,514	114,807	51,616
	Sep	45	1,510	208,831	122,920	39,206
	Oct	38	5,140	108,545	131,468	37,969
	Nov	10	4,316	57,595	79,365	38,144
	Dec	2	3,942	58,624	29,124	38,791
2021	Jan	12	475	59,029	17,069	43,454
	Feb	26	456,975	63,665	61,906	48,484
	Mar	2	2,390	67,380	19,994	54,923
	Apr	0	-	-	-	33,157
	May	14	16	21,333	-	21,421
	Jun	14	1,170	34,965	26,485	29,786
	Jul	2	3,860	8,063	36,498	29,957
	Aug	35	220	67,057	60,016	27,918
	Sep	22	6,278	34,106	20,589	35,327
	Oct	0	-	-	13,215	17,778
	Nov	0	-	-	-	30,296

	Dec	1	-	34,151	-	40,420
2022	Jan	1	-	21,054	-	50,296
	Feb	1	-	13,879	12,520	51,054
	Mar	0	-	-	-	50,246
	Apr	0	-	-	-	32,559
	May	0	-	-	-	36,067

Note: "N/A" indicates no data and "–" indicates no payment was made.
Source: ALIC

Attachments:

No Attachments