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Arrangement Regarding Bovine Meat
Thirty-First Meeting
16 December 1994

MEAT CONSUMPTION TRENDS

At the twenty-seventh meeting of the Meat Market Analysis Group, held on 15-16 June 1994, participants agreed to reply to a questionnaire regarding meat consumption trends on a voluntary basis (IMC/W/97). The documents containing the replies to this questionnaire are circulated on a country-by-country basis under the document series IMC/W/-.

JAPAN

Question 1

Is meat the major source of animal proteins in your country? How does it compare with other animal protein sources such as fish? Have there been any changes in the relation of the consumption of meat and other animal proteins? Why?

In terms of the general protein supply in Japan, 50 per cent comes form vegetable sources, which is, in comparison to other countries, a rather high ratio. As far as animal protein supply is concerned, the main source is seafood, which accounts for 40 per cent, while meat only accounts for 32 per cent.

In recent years, animal protein supply is marginally increasing compared to vegetable protein. Protein supply per capita of beef or eggs is on the upward trend. On the other hand, protein supply per capita of seafood reached a peak in 1988 and has decreased slightly since then. This is due to the recent diversity of animal proteins in line with the development of the standards of living and income.

Question 2

Which type of meat has traditionally the consumers' preference in your country? Why?

Traditionally, Japan is not a meat-consuming country and it was only one century ago that Japan began to consume meat as usual. Since then, the per capita consumption of meat has grown continuously to reach, in 1965, just under 10 kg., and, in 1993, three times as much again.

In the 1960's and 70's, the consumption of less expensive meat (e.g. frozen mutton for processing) was relatively high, but it has since been decreasing continuously. The main reason for this decline is due to the change in the consumers' preference for high quality meat rather than lower priced meat, which has been caused by improved standards of living and higher income.

As for pigmeat and poultry meat, per capita consumption steadily grew up to the late 1980's. However, in recent years, consumption stagnated, mainly due to an increase in the consumption of beef, the price of which has been decreasing with imports having been liberalized.

Question 3

Do meat consumption *trends* in your country correspond to the general trend described above (see IMC/W/97), **i.e. a shift away from red meat consumption to white meat, in particular poultry meat? Please provide evidence.**

Meat consumption trends in Japan do not reflect the general "trends in industrialized countries, and more recently in some developing countries", as mentioned in the Note by the Secretariat. Evidence is shown in Table 1, which represents the per capita consumption of each type of meat, and especially that of beef which is steadily on the increase.

Question 4

Which factors among those cited above (see IMC/W/97) **(and/or others) affected beef and veal consumption the most in your country? Please elaborate. For example, the following factors and their changes are frequently identified as significantly affecting beef and veal consumption: beef prices; disposable household income; relative prices of other meats; population growth; age structure of the population; health considerations (including those related with production methods); product image; animal welfare concerns. What is the role of those factors? What other factors are relevant?**

The per capita beef consumption is growing continuously in Japan. The reasons for this growth are:

(main reason).

- growth of disposable household income
  (from 150,935 yen per month in 1973 to 478,155 yen per month in 1993 - an increase by 3.17 times over the twenty years)

(subsidiary reasons):

- population growth
  from 109,104 thousand in 1973 to 123,764 thousand in 1993 - an increase by 14.4 per cent over the twenty years);

- change in dietary habits caused by the influence of western life-style.

Recently, beef consumption has grown rapidly, mainly due to the liberalization of beef imports and to the appreciate of the yen on foreign currency markets. However, such rapid growth is hardly expected to continue because annual tariff reduction rates will be less than the 2 per cent mark and further appreciation of the yen is unexpected. As for veal consumption, it is almost nil in Japan.

Question 5

Is there any relationship between beef trade and domestic beef consumption in your country? Please elaborate.

Per capita beef consumption has been growing continuously since 1966 (1.2 kg. per year), and reached 6.7 kg. per year in 1992. Throughout this period, the consumption of both domestic and imported beef increased.

After the liberalization of beef imports in 1991, the consumption of imported beef increased rapidly. Despite this, the consumption of domestic beef (both wagyu beef and dairy beef) also increased slightly after 1991. The reason for this simultaneous growth is mainly due to the consumers' view that domestic beef is comparatively higher in quality, thus there still remain some differences between the consumption of domestic beef and imported beef. As far as low-graded domestic beef is concerned, it has to compete with the quality of imported beef, and its wholesaled prices have drastically fallen since the liberalization period.

Question 6

Are there any policies or other measures in force directed at affecting beef consumption and/or retail beef prices in your country? In the affirmative, please describe the type of measures and the rationale behind them.

Although there is a price stabilization system for beef, we have never operated it since its establishment. Therefore, this system has had no affect on the consumption of beef and/or retail beef prices.

Question 7

Are there other types of measures designed to stimulating meat consumption (promotion campaigns in fairs, audiovisual promotion, particular marketing techniques)? For all types of meat or for a particular type of meat? Please specify.

The meat industries' corporations in exporting countries design measures to improve the consumption of their beef. These measures are mainly aimed trough the media (e.g. television commercials and magazine advertisements) and in some cases through promotion campaigns in fairs.

As for domestic meat, similar campaigns are also designed for beef, pigmeat and poultry meat, respectively.

Question 8

Retail trade practices are changing fast in a rising number of countries. Butcheries are being affected by competition from supermarkets and hypermarkets. Is this the case in your country? How is it affecting meat consumption in general, and beef and veal in particular? Is meat quality being affected?

In Japan, butcheries are also affected by competition from supermarkets, as in other countries. As a result of the mass selling of cheaper imported beef by supermarkets after the beef import liberalization, beef consumption has increased and the share of imported beef has risen.

Question 9

Is the catering market an area of expansion in your domestic market? How does it affect the consumption of the different types of meat?

The ratio of the catering consumption in the meat market is an area of expansion, and especially in the beef market. Pigmeat is also expanding in the catering market (Table 2).

Question 10

Could you forward to the Secretariat any study/document, official or non-official, which your authorities believe might be helpful for a better assessment and understanding of meat consumption trends in your country?

Unfortunately, we do not have any useful documents which are written in English to submit to the Secretariat.

Table 1

Per Capita Consumption (Boneless) and its Share of Various Meat

Japanese fiscal year		1989	1990	1991	1992	1993
Beef	kg.consum.	5.5	6.1	6.2	6.7	7.5
	% share	19.3	21.4	21.5	22.7	25.1
Pigmeat	kg.consum.	11.5	11.5	11.5	11.5	11.4
	% share	40.6	40.4	39.9	39.0	38.2
Poultry meat	kg. consum.	10.4	10.2	10.4	10.6	10.4
	% share	36.7	35.8	36.0	35.9	34.8
Other meat	kg. consum.	0.8	0.7	0.7	0.7	0.6
	% share	2.8	2.5	2.4	2.4	2.0
Total	kg. consum.	28.3	28.5	28.9	29.5	29.9
	% share	100	100	100	100	100

Table 2

The Ratio of Usage in Beef, Pigmeat and Poultry Meat Consumption

Calendar year		1989	1990	1991	1992	1993
Beef	Household	50.2	48.1	47.5	47.4	45.9
	Processing	11.9	8.6	9.9	8.2	7.9
	Catering etc.	37.9	43.3	42.6	44.4	46.2
Pigmeat	Household	40.7	40.3	39.4	39.3	40.4
	Processing	30.9	30.3	31.6	31.6	30.2
	Catering etc.	28.4	29.3	29.0	29.1	29.4
Poultry meat	Household	33.0	32.3	31.8	31.1	32.0
	Processing	6.3	7.8	9.1	9.7	10.7
	Catering etc.	60.8	59.9	59.1	59.2	57.3