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Decline of Japanese Pork Specified Cut Self-Supply Ratio

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Abstract

The purpose of this study is to analyze the self-supply ratio of Japanese domestic pork cut and the influence of the existing price stabilization system (that stabilizes fluctuations in pork carcass prices) and the differential tariff system (that regulates the volume of imported pork). The benchmark price of Japanese domestic pork is unreliable. The benchmark definition is mainly based on the dressed carcass price of the Tokyo wholesale market, but this market share was only 0.81% in 1998, and cut meat has been mainly distributed instead of carcasses in Japan. Therefore, an alternative benchmark should be developed. Between 1988 and 2000, the self-supply ratio of total pork cut decreased from 77.7% to 58.0% in Japan. The imported pork cut market share increased because Japanese consumers prefer tenderloin and loin to the other pork cuts, so that those two cuts were in short supply. In 2000, the chilled pork supplied from the North American Free Trading Agreement Area accounted for 88% of the total chilled imported pork cut, and the ratio of chilled pork to the total imported pork cut was 29.0%. In 2000, the self-supply ratio was 32.2% (loin) and 26.1% (tenderloin). The annual sales by wholesale price per year was a record ¥141.4 billion (loin) and ¥23.5 billion (tenderloin). Therefore, the self-supply ratio of pork cut of the popular Japanese cuts was very low. The 10 highest-ranking Japanese meat processors have made profits mainly as wholesalers from the two current Japanese systems. Two major systems, the Different Tariff System and the Stabilization System of Livestock Prices, should be restructured, because these two major systems have been more beneficial to specific meat processors rather than Japanese consumers and have not worked as benchmark for domestic pork prices in Japan. It would be more beneficial to Japanese consumers, if new systems should be established in places of these two systems.

Key words: Pork, Self-supply Ratio, Cut Meat, Loin, Tenderloin

Introduction

In Japan, domestic distribution of pork has been very complicated^{11,12,13)}. In 1998, the Japanese wholesale markets, including 10 central wholesale markets and 22 designated markets, handled only 14.3% of the domestic pork distribution. Japanese domestic pork prices have been under the control of two major systems, the Differential Tariff System and Stabilization System of Livestock Prices. Since 1971, the Differential Tariff System has regulated the pork

import volume. Since 1961, the Stabilization System of Livestock Prices has controlled domestic pork prices. The Japanese domestic distribution of pork has changed recently from carcass to cut meat. Since 2001, pork cuts meats have been distributed rather than whole carcasses, but both the existing domestic pork price formation system in the wholesale markets and the pork import system are still based on whole carcass distribution assumptions. Japanese consumers prefer loin and tenderloin to other pork cuts. However, the Japanese Stabilization System of

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Table 1. Self-supply ratio on pork cuts in Japan (1988-2000)

							Unit: %
Year	Shoulder	Loin	Belly	Tenderloin	Ham	Other	Total
1988	87.3	63.1	76.7	56.2	84.0	67.9	77.7
1989	84.5	61.3	74.9	56.4	85.4	67.2	76.5
1990	83.3	60.1	76.1	58.4	88.4	57.2	76.2
1991	81.0	56.0	69.3	52.9	84.2	50.4	71.7
1992	83.3	50.1	63.4	40.5	83.0	44.5	68.0
1993	79.9	45.9	68.2	42.8	87.5	71.0	69.1
1994	79.0	42.2	67.1	41.8	84.6	72.6	66.6
1995	77.3	38.4	59.4	33.3	80.3	66.9	61.8
1996	71.3	33.7	62.5	27.0	79.5	57.3	57.8
1997	80.0	37.4	62.2	33.1	91.6	66.5	64.1
1998	79.0	37.7	63.4	32.8	93.2	62.7	64.3
1999	74.8	35.9	59.9	31.4	82.7	56.5	60.1
2000	73.4	32.2	54.4	26.1	95.0	58.1	58.0

Livestock Prices has relied on the prime grade dressed carcass prices for pork on the Tokyo and Osaka wholesale markets. The volume of prime grade dressed carcasses on Tokyo and Osaka wholesale markets has been less than 1.0% of the annual Japanese domestic pork dressed carcass total. Thus, the prices of pork prime grade carcasses in these two wholesale markets should not be the benchmark of Japanese domestic pork prices because prices can be manipulated in small markets. Most of the import pork cuts have been a combination of cut meats, not carcasses. However, the Japanese differential Tariff System has been based on the carcass prices under the control of the Stabilization System of Livestock Prices. Those carcass prices should not be the benchmark of overall Japanese pork prices. Thus, the Japanese Differential Tariff System has been regulated under manipulated prices.

Materials and Methods

In the present study, pork cuts include the shoulder, loin, belly, tenderloin, ham and other cuts. Each aspect of pork cut distribution in Japan from 1988 to 2000 was investigated, including domestic and imported cuts^{11,12)}. The import volume of chilled pork cuts and the ratio to the total import volume of pork cuts including chilled and frozen was calculated for 1994 to 2000. Sales of Japanese domestic pork cuts, which included shoulder, loin, belly, tenderloin, ham and other cuts during the period 1989-2000, were calculated. In Japan, pork cuts has been traded at Cut Meat Centers in Kawasaki, Osaka, and Nagoya since 1981. The amount of pork cuts traded at the Japan Meat Distribution Center (JMDC) at these three centers and the total amount of pork cut distribution in Japan was calculated from 1995 to 2000. In 2000, processed meat products were produced at 180 Japanese meat-processing companies. However, the

market share of the top 10 companies was 65.6%, and the concentrated rate of the top 25 companies was 80.2% in 1999. The fiscal 1999 annual sales breakdown of the 10 main meat processors was investigated. The 10 main processors are Nippon Meat Packers inc., Itoham Foods inc., Prima Meat Packers, Ltd., Marudai Food Co., Ltd., Snow Brand Foods Co., Ltd., Starzen Co., Ltd., Yonekyu Food Co., Ltd., Fukutome Meat Packers, Ltd., Takizawa Ham Co. Ltd., and Sagami Ham Co., Ltd.

Results and Discussion

Wholesale prices

The annual sales summed up by wholesale price of domestic pork dressed carcasses all over the country has decreased from ¥826.19 billion to ¥530.71 billion per year, and the average annual volume at all central wholesale markets in Japan was only 6.1-7.7% of the total domestic production between 1989 and 1998. The benchmark definition of pork is prime grade dressed carcass on Tokyo and Osaka wholesale markets, but the market share was already less than 1.0% in 1998.

Pork cut

Imported pork cut meats have increased because Japanese people prefer tenderloin and loin to the other pork cuts, so that there was a shortage of those two cuts. Between 1988 and 2000, the amount of pork cut distribution slightly increased from 1.43 million tons to 1.55 million tons, but the self-supply ratio of total pork cuts decreased from 77.7% to 58.0%. Total annual sales of Japanese domestic pork cuts decreased from ¥778.7 billion (1989) to ¥562.5 billion (2000). In 2000, the amount of chilled pork supplied from the North American Free Trading Agreement Area accounted for 88% of the total chilled imported pork cut meat, and the ratio of chilled pork meat to the total imported pork cut meat was 29.0%. In 2000,

Table 2. Annual sales by wholesale price on domestic pork cut in Japan (1989–2000)
Unit: 100 million yen

Year	Shoulder	Loin	Belly	Tenderloin	Ham	Other	Total
1989	2000.4	2271.5	1006.7	461.4	1850.9	196.4	7787.3
1990	2014.4	2156.8	1015.1	459.1	1642.5	218.4	7506.3
1991	2091.9	2057.0	1086.7	431.8	1993.2	225.4	7886.0
1992	1813.2	1826.8	1125.0	401.5	1670.2	194.6	7031.3
1993	1765.6	1850.4	1002.9	348.6	1637.9	194.5	6799.9
1994	1688.8	1665.2	1039.1	272.3	1517.0	181.7	6364.1
1995	1722.0	1898.9	1096.3	317.2	1569.2	173.4	6777.0
1996	1541.4	1580.1	1103.0	277.3	1326.3	136.2	5964.3
1997	1786.7	1936.1	1153.5	330.8	1292.8	158.6	6658.5
1998	1672.0	1629.9	1066.7	287.7	1455.7	151.9	6263.9
1999	1602.3	1590.7	1075.8	246.4	1352.0	140.3	6007.5
2000	1509.1	1413.6	1060.5	234.9	1281.2	125.6	5624.9

Table 3. The annual amount of pork cuts traded at the Japan Meat Distribution Center (JMDC) and the total Japanese domestic pork cut distribution (1995–2000)

Unit: 1000 tons			
Year	Annual Amount at JMDC (A)	Annual Domestic Distribution (B)	(A)/(B)
1995	44.1	935.3	4.7%
1996	34.9	893.8	3.9%
1997	32.1	907.2	3.5%
1998	93.4	908.8	10.3%
1999	138.4	902.9	15.3%
2000	142.2	898.4	15.8%

Japanese imported pork cut, including chilled and frozen, were mainly from the North America Free Trade Area, 67.0% came from the U.S. and 21.5% from Canada. The self-supply ratio of pork cuts in Japan is presented in Table 1. Japanese domestic pork cut self-supply ratio has recently decreased. The self-supply ratio of Japanese-favored cuts (loin and tenderloin) was very low. Annual sales by wholesale price on domestic pork cut in Japan are presented in Table 2. Japanese domestic pork cuts annual sales have decreased. In 2000, the self-supply ratio and the annual sales by wholesale price per year of Japanese domestic pork cuts were 73.4% and ¥150.9 billion (shoulder), 32.2% and ¥141.4 billion (loin), 95.0% and ¥128.1 billion (ham), 54.4% and ¥106.1 billion (belly), 26.1% and ¥23.5 billion (tenderloin), and 58.1% and ¥12.6 billion (other), respectively. Table 3 shows the ratio of the annual amount of pork cut traded at the Japan Meat Distribution Center (Kawasaki, Osaka and Nagoya) to the total Japanese domestic pork cut meat increased from 5% (1995) to 16% (2000) between 1995 and 2000.

Japanese meat processors

Japanese selected meat processing companies

have made profits mainly as wholesalers and have influenced the domestic distribution of meat. The fiscal 1999 sales breakdown on the 10 highest-ranking meat processors in Japan is presented in Table 4. In 1999, among the 10 highest-ranking meat processors, 7 companies had handling commissions more than 50% of their total sales, and 3 companies' handling commissions were within the range of 30%–50%. The existing system has been more beneficial to these 10 high-ranking meat processors than to the Japanese consumer.

Different Tariff System and Stabilization System of Livestock Prices

Two major systems, the Different Tariff System and the Stabilization System of Livestock Prices, are out of date, because these two major systems have been more beneficial to these 10 high-ranking meat processors rather than Japanese consumers and have not worked as benchmark for domestic pork prices in Japan. We suggest that new systems should be established in places of these two systems. It would be more beneficial to Japanese consumers, if Japanese Government would shift the policy from a pork self-supply system to an import-supply system. In this case, it would be better for Japanese consumers to abolish the different tariff systems and take part in Free Trade Agreement on livestock products instead of the existing different tariff systems. This study concluded that the pork futures market in Japan could succeed as the benchmark for pork prices instead of the existing Stabilization System of Livestock Prices if Japanese domestic pork cut meat was traded on the futures trading market. If pork were traded on a futures trading market in Japan similar to the U.S. Chicago Mercantile Exchange, the pork futures market could be an alternative pricing market to the Japanese central and local wholesale markets. We propose that a set of Japanese domestic pork cuts, for example, loin or a combination of loin

Table 4. Fiscal 1999 sales breakdown for 10 highest-ranking meat processors in Japan

Unit: 100 million yen

	Nippon Meat Packers Inc.	Itoham Foods Inc.	Prima Meat Packers Ltd.	Marudai Food Co., Ltd.	Snow Brand Foods Co., Ltd.	Starzen Co., Ltd.	Yonekyu Food Co., Ltd.	Fukutome Meat Packers, Ltd.	Takizawa Ham Co., Ltd.	Sagami Ham Co., Ltd.
Sales as wholesaler										
(A)	3643.2	2175.2	1461.9	670.7	345.1	1778.2	416.3	222.3	175.5	138.1
Other	2440.6	2020.0	1055.2	1497.8	683.2	246.6	355.6	140.2	177.6	128.6
Total (B)	6083.7	4195.2	2517.1	2168.5	1028.3	2024.9	771.8	362.5	353.0	266.7
(A)/(B)	60%	52%	58%	31%	34%	88%	54%	61%	50%	52%

and tenderloin, would be suitable as deliverable commodities on the pork futures market.

Benchmark for domestic pork prices

There has been no benchmark for domestic pork prices in Japan. In November 1999, domestic fresh broiler leg meat contracts began trading on the Kanmon Commodity Exchange (Fukuoka) and egg contracts began trading on the Chubu Commodity Exchange (Nagoya). Like the agricultural products on the Chicago Mercantile Exchange in the U.S.^{1,2)}, Japanese broiler and egg prices on the futures trading market could serve as the benchmark for domestic prices³⁻¹⁰⁾. As of 2004, Japan had not yet started Pork Futures Trading. We therefore propose that the Japanese government should investigate the possibility of pork cut trading on the Japanese futures market.

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豚部分肉の特定部位自給率低下

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摘 要

国内での豚肉流通実態を明らかにする目的で、入手資料を分析した。1988年から2000年に、豚肉の部位別国内流通合計量は、143万トンから155万トンへ微増し、自給率は77.7%から58.0%へ低下した。2000年の部位別自給率は「ひれ」26.1%、「ロース」32.2%、「ばら」54.4%、「かた」73.4%、「もも」95.0%であり、とくに特定部位である「ひれ」と「ロース」については、1988年から2000年にかけて、「ひれ」は63.1%から32.2%へ、「ロース」は56.2%から26.1%へと顕著に低下した。豚部分肉の国内市場規模は、1989年から2000年にかけて72%に縮小した。国内の豚肉流通は枝肉流通を前提として、畜産物価格安定制度と輸入制度が存在するなか、1995年から2000年にかけて部分肉の流通を扱う日本食肉流通センターの扱い量は、国産豚肉流通量の4.7%から15.8%へ増加した。1999年の大手ハム・ソーセージ会社上位10社は食肉流通業者としての売り上げが大きく、7社の売上額が総売上額の50%以上、3社が30%以上50%以下であり、国内での豚肉流通は、大手ハム・ソーセージ会社の影響が大きい。豚肉の国内流通の主流は枝肉から部分肉に移行し、輸入豚肉も部位別に輸入されている。国内の豚肉流通について部分肉流通が増加している現状から、現行の畜産物価格安定制度と輸入制度の実効性向上にむけ、新たな施策を検討することは有意義である。

キーワード: 豚肉, 自給率, 部分肉, ひれ, ロース