Red Meat Market Report

Japan

Beef market – Japan
2010 update

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Key developments in the market

- **Firm positioning of Australian beef in Japan:** Japan remained Australia's top export destination for beef, in terms of both volume (39% of total exports) and value (also 39% of total) in 2010. Australia occupied 41% of the total beef market share in Japan.
- **Frozen beef underpins export volumes:** Australian beef exports to Japan in 2010 totalled 356,211 tonnes swt, only 356 tonnes less (down 0.1%) from the previous year. Frozen beef shipments reached 200,675 tonnes swt (up 7%), the second highest yearly total on record. Demand for frozen beef was supported by the robust performance of the fast food, processing and casual foodservice sectors.
- **Gradual recovery of beef consumption:** Consumption of beef in Japan improved moderately in 2010, up 1% from 2009, but still 9% lower than pre-US BSE levels in 2003.
- **US increasing market share:** Imports of US beef into Japan during 2010 rose by 32% on 2009, to 91,618 tonnes, occupying 18% of Japan's imported beef market (up four percentage points from 2009). There was no change in the US beef import protocols during 2010.
- **Market access:** Beef is still regarded as one of the sensitive issues by Japan in the Australia-Japan Free Trade Agreement negotiations. There has been a political push to invigorate the country's stagnant economy via a freeing up of trade, but agricultural opposition remains strong.

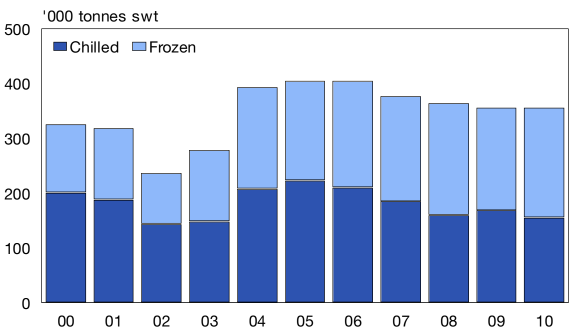
Australian beef exports to Japan

Overview

- Despite the country's slow economy and increasing competition from the US, Japan remained Australia's largest export market and second largest beef market in 2010 – after the Australian domestic market. Australia shipped 356,211 tonnes swt of beef to Japan during 2010, only 356 tonnes less (down 0.1%) than in 2009.
- In value terms, beef exports to Japan for the year were worth A$1.72 billion (excluding offal), down 6% from 2009, and accounted for 39% of total export value. The average value per kilo declined 6% year-on-year, to A$4.84, as a result of the high A$ and an increase in lower value frozen exports.

Figure 1

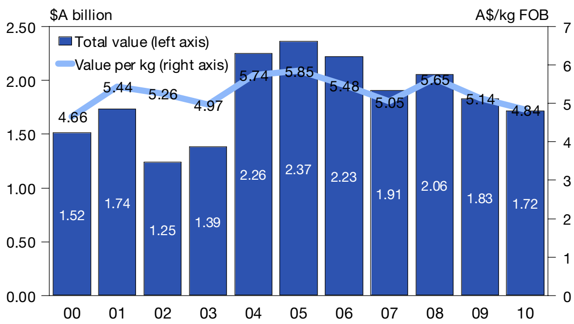
Australian beef exports to Japan - chilled and frozen



Source: DAFF

Figure 2

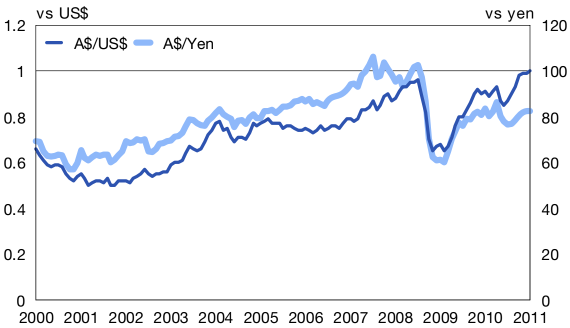
Australian beef exports to Japan - values



Source: Global Trade Atlas

Figure 3

A$ exchange rates



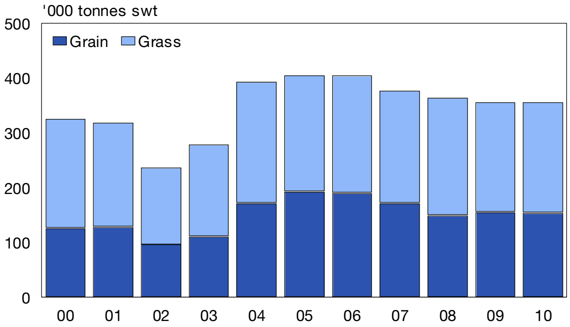
Source: Reserve Bank of Australia

- The A$ remained robust throughout 2010, averaging 92 US¢ (17% higher than 2009 average) and 80.73 yen (up 10%). The strong currency, combined with a tightening in Australian cattle supply, resulted in another challenging year for both beef exporters and Japanese buyers.

Composition of exports

- In the 2010 calendar year, grassfed beef made up 57% of Australian beef exports to Japan, totalling 201,850 tonnes (471 tonnes more than 2009). Grainfed shipments were down 1% year-on-year, to 154,362 tonnes.

Figure 4
Australian beef exports to Japan - grass and grain



Source: DAFF

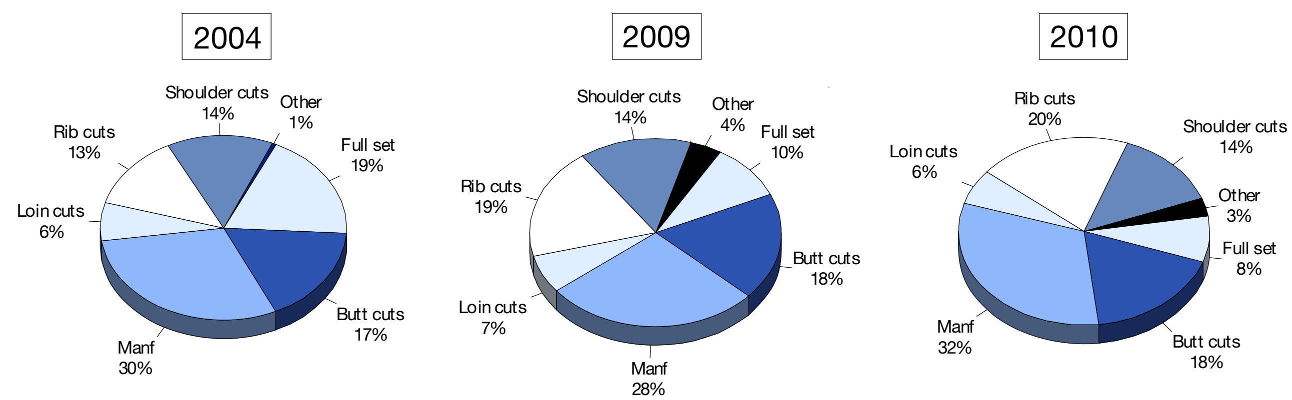
- Frozen beef shipments for 2010 were the second highest on record, at 200,675 tonnes – an increase of 7% on the previous year. In contrast, chilled beef exports were subdued, falling 8% year-on-year, to 155,536 tonnes swt – 18% below the average of the past five years. Chilled grainfed exports were down 9% year-on-year, to 103,761 tonnes, on the back of strengthening competition from the US, as well as slow sales at supermarkets and upper end restaurants.

- The main changes to the major cut categories in 2010 were experienced by manufacturing beef (up 14% year-on-year to 112,223 tonnes), briskets (down 1% to 61,354 tonnes), fullsets (down 23% to 27,277 tonnes), blade (down 2% to 22,669 tonnes) and chuck roll (down 3% to 19,991 tonnes).

- The consistent demand for manufacturing beef was underpinned by the robust performance of the fast food and casual foodservice outlets in Japan during 2010. By chemical lean (CL) content, 65CL continued to be the most popular item, at 36,591 tonnes (up 21% from 2009), followed by 85CL (32,078 tonnes, up 12%) and 75CL (16,105 tonnes, up 9%). These products are often used as ingredients for hamburger patties, hamburgs (steak sized flattened meatballs), meat sauces, curries and other processed food.

- The long-term decline in fullset shipments continued in 2010, as buyers preferred the flexibility of buying high-demand cuts as required. Blade exports to Japan last year were mostly impacted by the strong demand from other markets, such as Korea and Russia, while the higher beef imports from the US into the Japanese market negatively impacted demand for Australian briskets and chuck roll.

Figure 5
Australian beef exports to Japan by cut



Source: DAFF

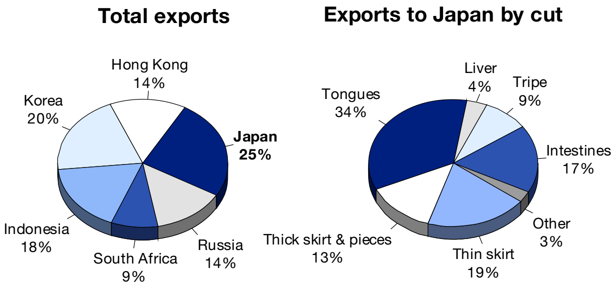
Table 1
Australian beef exports to Japan (tonnes swt)

	Chilled				Frozen				Total			
	2009 tonnage	2010 tonnage	Net change	% change	2009 tonnage	2010 tonnage	Net change	% change	2009 tonnage	2010 tonnage	Net change	% change
Manufacturing	257	385	128	50%	98,237	111,838	13,601	14%	98,494	112,223	13,729	14%
Brisket	25,250	24,274	-976	-4%	36,436	37,079	643	2%	61,686	61,353	-333	-1%
Fullset	35,258	27,242	-8,016	-23%	26	35	9	-	35,284	27,277	-8,007	-23%
Blade	20,189	20,266	77	0%	2,959	2,403	-556	-19%	23,148	22,669	-479	-2%
Chuck roll	17,933	18,096	163	1%	2,656	1,895	-761	-29%	20,589	19,991	-598	-3%
Silverside/Outside	14,431	14,066	-365	-3%	3,001	3,021	20	1%	17,432	17,087	-345	-2%
Topside/Inside	11,503	11,325	-178	-2%	3,321	4,966	1,645	50%	14,824	16,291	1,467	10%
Striploin	9,949	9,424	-525	-5%	1,865	1,976	111	6%	11,814	11,400	-414	-4%
Thick Flank/Knuckle	8,372	7,389	-983	-12%	1,838	1,279	-559	-30%	10,210	8,668	-1,542	-15%
Thin Flank	3,575	3,084	-491	-14%	6,482	6,922	440	7%	10,057	10,006	-51	-1%
Rump	6,287	5,497	-790	-13%	123	57	-66	-54%	6,410	5,554	-856	-13%
CubeRoll/Rib Eye Roll	4,781	4,052	-729	-15%	937	938	1	0%	5,718	4,990	-728	-13%
Other	11,146	10,438	-708	-6%	29,758	28,266	-1,492	-5%	40,904	38,704	-2,200	-5%
TOTAL*	**168,931**	**155,538**	**-13,393**	**-8%**	**187,639**	**200,675**	**13,036**	**7%**	**356,570**	**356,213**	**-357**	**0%**

Source: Department of Agriculture, Fisheries and Forestry Note: *may not sum to total due to rounding

■ Japan remained the largest market for Australian beef offal in 2010, totalling 25,885 tonnes swt in volume (up 3% from 2009), and A$172.8 million in value (down 2%). Skirt continued to be the most popular item for this market, accounting for 8,525 tonnes (down 4% year-on-year), or 33% of the total beef offal exports to Japan. Other major offals were tongues (down 1% to 7,804 tonnes), intestines (up 38% to 4,426 tonnes), tripe (up 8% to 2,309 tonnes) and manufacturing (mostly tongue products, up 1% to 1,059 tonnes). The majority of these offal items are consumed at yakiniku (Japanese/Korean style barbecue) restaurants, or sold at retail after being processed with soy based yakiniku sauce or miso flavoured soup.

Figure 6
Australian beef offal exports in 2010



Source: DAFF

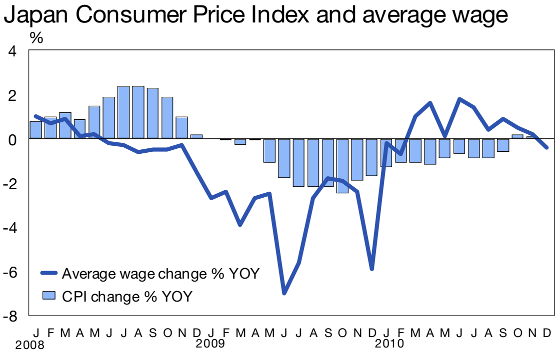
Japan market trends

Japanese economy

■ Having surfaced from the depths of the recession in 2009, Japan's gross domestic product (GDP) grew year-on-year in three consecutive quarters in 2010. The government has forecast annualised growth of 1.5% in real terms and a slight easing in the unemployment rate (currently around 5%) for fiscal 2011 (April 2011 to March 2012).

■ However, nominal GDP growth rates are likely to stay below the real growth rate for the foreseeable future, indicating a prolonged period of deflation.

Figure 7
Japan Consumer Price Index and average wage

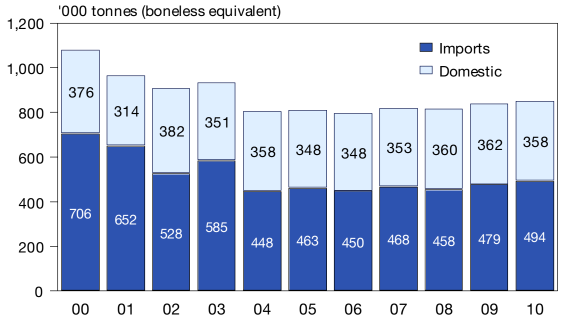


Source: Ministry of Health, Labour and Welfare, Ministry of Internal Affairs and Communications

Beef consumption

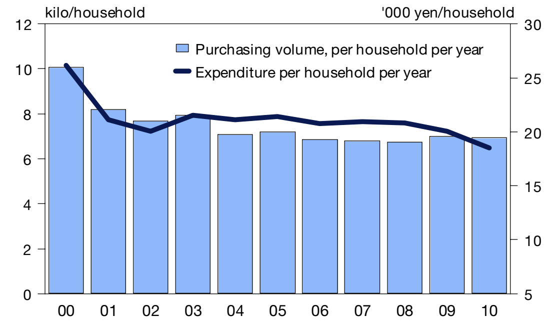
■ Japan's beef consumption in 2010 totalled 852,095 tonnes (boneless equivalent), up 1% from the previous year, but still 21% lower than 2000 (before the discovery of BSE in Japan), and 9% less than 2003 (prior to Japan's ban on US beef due to BSE).

Figure 8
Japan's beef consumption



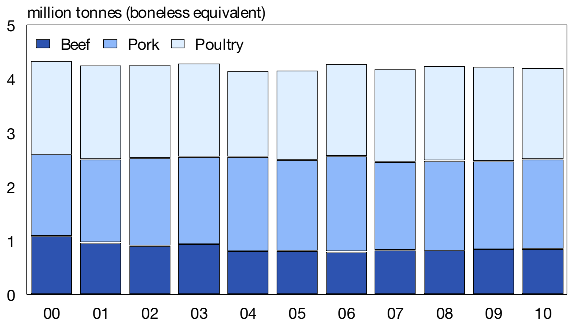
Source: ALIC, supply and demand

Figure 9
Japan household beef purchases and expenditure



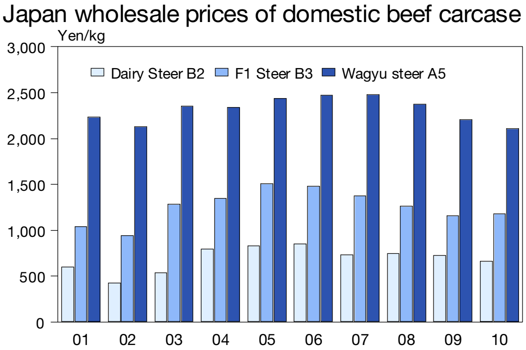
Source: Ministry of Internal Affairs and Communications, Japan

Figure 10
Protein consumption in Japan



Source: ALIC

Figure 11
Japan wholesale prices of domestic beef carcase



Source:Shokuniku Sokuho, Tokyo Wholesale Meat Market.
ABC (yielding score, A=highest), 1 to 5 (meat quality store, 5=best)

■ Consumption of imported beef in 2010 increased 3% year-on-year, to 493,828 tonnes. The growth was largely due to increased beef imports from the US, as well as the robust demand from the fast food and casual dining sectors (volume users of Australian beef).

■ On the other hand, Japanese consumption of domestic beef eased 1%, to 358,267 tonnes. Japanese households – traditionally the key outlet for domestic beef – spent less for beef in 2010, with the purchasing volumes and expenditure declining 1% and 8% year-on-year, respectively.

■ Total meat protein consumption in Japan during 2010 eased 1% from the previous year, to 4.20 million tonnes (boneless equivalent). The fall was due to a decline in poultry consumption (down 5% to 1.69 million tonnes), while pork consumption remained steady (up 1% to 1.66 million tonnes).

Wholesale market

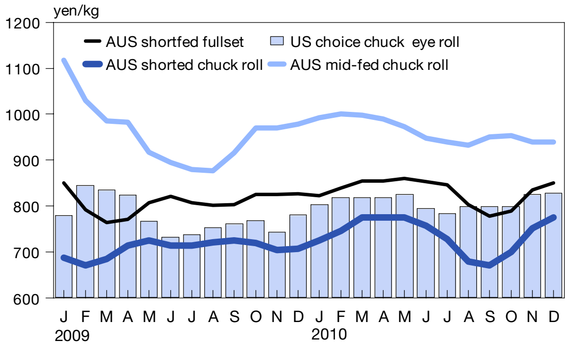
■ Wholesale carcase prices of Japanese domestic beef were generally soft in most categories during 2010, as slow demand from end users continued. The average price of Wagyu A5 and dairy steer B2 during 2010 eased 4% (to 2,115 yen/kg) and 9% (to 672 yen/kg), respectively. In comparison, F1 carcase prices firmed slightly from 2009, largely due to tightened supplies.

■ In 2010, Australian chilled beef prices in the Japanese wholesale market saw some lift year-on-year across most category, largely due to increased import costs – as a result of the robust A$ and tight supply. Seasonally, the long and hot summer (June to September) eased overall meat demand, particularly at the retail sector, affecting prices of major items such as Australian shortfed chuck rolls.

■ Australian frozen beef prices firmed in 2010, underpinned by the increased focus on the lower value beef (as opposed to higher value chilled beef), and a gradual recovery in the foodservice sector. A significant increase in the availability of frozen US beef (particularly rib cuts) resulted in cheaper wholesale prices, negatively impacting prices of Australian navel end brisket.

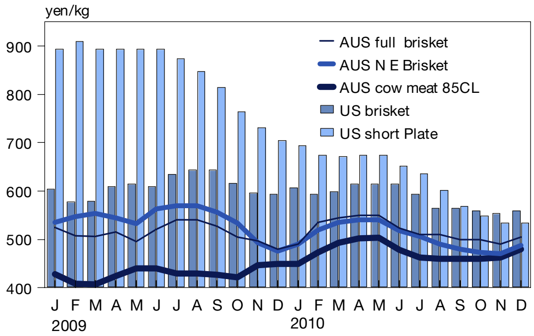
[1] While the US$ weakened against the yen, the yen appreciation sale was seen by the trade as another reason to offer further discounts to budget conscious consumers.

Figure 12
Japan wholesale prices of imported chilled beef



Source: Chikusan Nippo

Figure 13
Japan wholesale prices of frozen beef



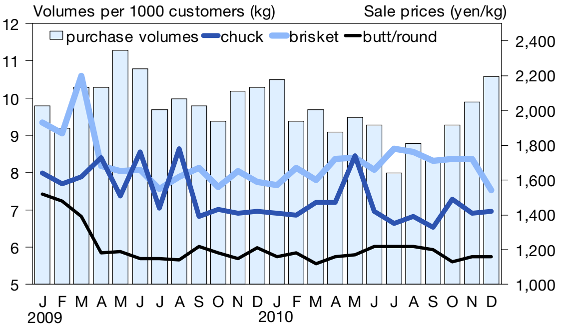
Source: Chikusan Nippo.

Table 2
Wholesale prices of imported frozen beef in Japan (yearly average yen/kg)

Year	AUS Chuck/Blade	US Shoulder Clod	AUS Full Brisket	US Brisket	AUS N Brisket	US Short Plate	US Short Rib	US Chuck Rib	AUS Topside	AUS Cow Meat (85CL)	AUS Trimmings (65CL)
2005	534	nq	625	nq	618	nq	nq	nq	566	nq	nq
2006	589	nq	639	nq	637	nq	nq	nq	668	nq	nq
2007	591	nq	556	nq	544	nq	nq	nq	686	nq	nq
2008	562	644	594	629	598	849	2,290	1,448	742	554	491
2009	559	543	514	611	540	845	2,104	1,133	629	429	339
2010	564	591	518	587	505	622	2,083	1,107	678	474	402
Change % 09/10	1%	9%	1%	-4%	-7%	-26%	-1%	-2%	8%	10%	19%

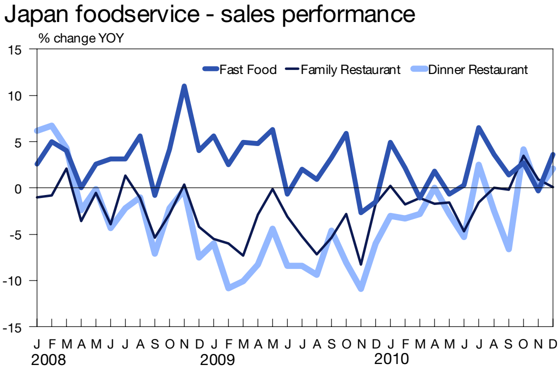
Source: Chikusan Nippo

Figure 14
Japan retail purchase volumes and average price of Australian beef



Source: ALIC

Figure 15
Japan foodservice - sales performance



Source: The Japan Foodservice Association, all store based

Retail market

■ The Japanese retail sector continued to weather tough business conditions in 2010, with beef being regarded as a 'slow demand item' throughout the year (the Japan Chain Stores Association), largely due to its higher prices than chicken and pork. However, some retailers noted an improvement in consumer interest in beef towards the end of the year, after the negative impact of the long and very hot summer on the market.

■ Consumer demand remained focused on lower value sliced/shaved items (mainly from shoulder/round cuts), while sales of loin and steak cuts were much slower, reflecting consumers' continuing preference for economising their household budgets.

Foodservice market

■ Cost cutting and low price competition remained prevalent in the Japanese foodservice market, pushing down the average spend per customer. Despite this, total foodservice sales value in 2010 increased by 0.5% year-on-year, the first recovery in two years (the Japan Foodservice Association).

■ The fast food category was the primary driver of the improvement, with its sales and customer number rising 2% and 4% year-on-year, respectively. The western style (hamburgers) and gyudon (beef rice bowl) operators are major users of Australian beef in Japan.

■ Western style family restaurants – another key users of Australian beef – also lifted sales by 1% from 2009, while yakiniku (Japanese/Korean style barbecue) managed to attract more customers (up 1%) despite a fall in sales (down 1%).

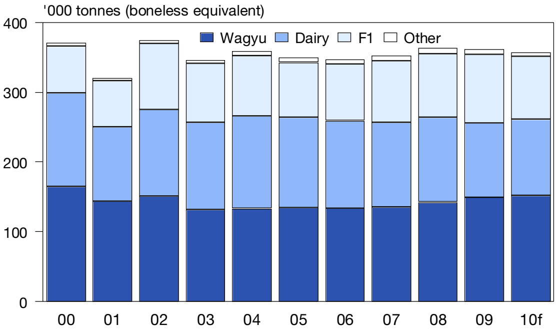
Competitive position

Japanese domestic beef

■ Japanese beef production was estimated to have totalled 358,000 tonnes (boneless equivalent) in 2010, down 1% on the previous year, largely due to a decline in F1 beef. The production shares of Wagyu, dairy and F1 categories were approximately 43%, 30% and 25%, respectively.

■ The Japanese cattle herd as of October 2010, declined 2% year-on-year, to 4.29 million head (the National Livestock Breeding Center of Japan). The Holstein herd was the largest (1.9 million head, down 0.3% from 2009), closely followed by the Japanese Black Wagyu (1.8 million, down 0.7%). The number of cattle properties in Japan fell by 5% year-on-year, to 89,690 farms, continuing the gradual decline of recent years. Japan's beef self sufficiency rate was 43% in the Japanese fiscal year 2009 (April 2009 to March 2010).

Figure 16
Japanese beef production



Source:MAFF, ALIC

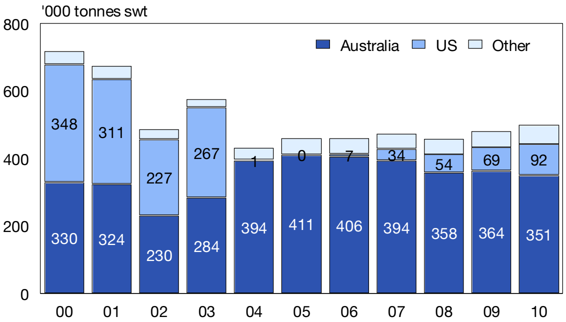
■ Japan experienced an unprecedented outbreak of the foot-and-mouth disease in 2010, resulting in the culling of 280,000 animals (pigs, cattle, buffalo, goats and sheep). The disease was identified and contained in the Miyazaki prefecture, the southern region of Japan. Miyazaki is known for high quality Wagyu beef production, and is the third largest prefecture for beef cattle in Japan. A total of 68,308 head of cattle was slaughtered due to the BSE outbreak, 23% of the cattle herd in Miyazaki.

■ The outbreak caused significant damage to the local livestock industry, as well to Japan's small Wagyu beef export trade. However, there was no evidence to date of direct impact on beef consumption or supply in the Japanese market due to the FMD outbreak.

■ With regard to BSE[1], local prefectural governments have continued the funding for BSE testing for cattle less than 20 months of age. All cattle slaughtered in Japan are still tested for BSE.

Imports

Figure 17
Beef imports in Japan



Source: MOF

■ Japan imported 499,531 tonnes swt of beef during 2010, up 4% from 2009, but still 31% than in 2000 (before the discovery of BSE in Japan), and 13% less than 2003 (prior to the discovery of BSE in the US).

■ Australia supplied 351,118 tonnes swt of beef to Japan in 2010, accounting for 70% of Japan's total beef imports (down six percentage points from 2009). Imports of US beef totalled 91,618 tonnes, accounting for 18% of total imports in 2009. Imports of US beef were 32% higher than in 2009, but were only 34% of the 2003 level.

[1] See Appendix 1 for a summary of BSE testing in Japan.

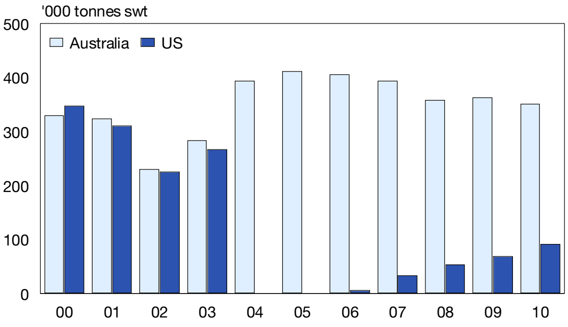
US beef

■ US beef is now sold by most major retailers in Japan, with the average purchase volume per 1,000 customer reaching 1.5kg in 2010, up 50% year-on-year[2]. The US also re-enforced its presence in the foodservice sector, now pushing into the family restaurant segment as well as the traditional gyudon, yakiniku and some casual dining – on the back of the weak US$ against the Japanese yen.

■ Safety concerns regarding US beef have been diminishing among Japanese consumers. MLA research in 2010[3] found that 45% of consumers still viewed US beef as "unsafe" – down 10 percentage points from 2009. In the same survey, consumers responded that the main reason to buy Australian beef is its "affordable price" (62%), followed by "safe" (20%).

Figure 18

Beef imports in Japan - Australia and US



Source: Ministry of Finance

■ The US and Japan held a working-level technical meeting concerning US beef in September 2010, the first meeting since 2007. The discussion largely focused on the two countries' respective BSE countermeasures. The US made no specific request for easing the current age restrictions during the meeting. "Japanese and the US governments agreed to continue talks from now on", according to a press release by MHLW & MAFF in September. As of the end of January 2011, there was no confirmed schedule for the next meeting.

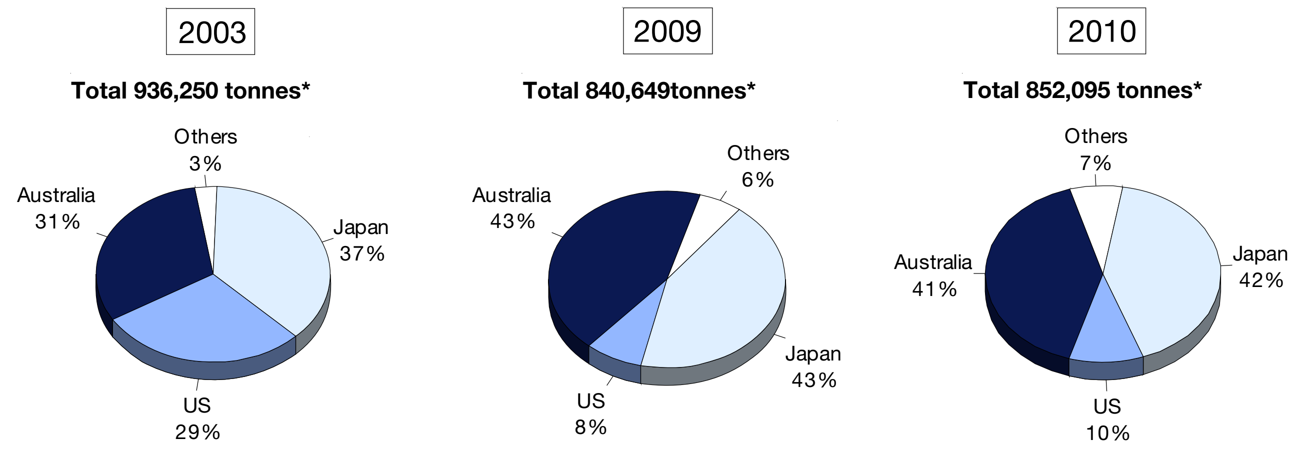
■ As a result, the bi-laterally agreed import protocol has remained in place since 2007, that all beef be sourced from cattle less than 21 months of age (with specified risk materials removed) and only from processing plants approved by Japanese auditors[4].

Beef market share

■ Australian beef occupied 41% of the total beef market in Japan in 2010, down two percentage points from 2009. Japan claimed 42% (down 1 percentage point year-on-year), and the US 10% (up two percentage points).

Figure 19

Beef consumption and market share in Japan



Source: ALIC, MOF * boneless equilavent

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2 Point of sale data, ALIC.

3 MLA Consumer Survey Findings report, July 2010.

4 See Appendix 3 for a summary of BSE incidents and US beef imports.

Market access

- The current tariff on beef is 38.5% (with the Safeguard[5] snapback provision to the 50% bound rate). Separate tariff rates are applicable to offal and processed beef. Imports of chilled and frozen beef during April to December 2010 were lower than the trigger levels set for the Japanese financial year 2010, and hence, the safeguard was not triggered.

- Australia and Japan started negotiations on a Free Trade Agreement (FTA, as a part of an Economic Partnership Agreement, or EPA) in 2007, with the 12th round of negotiations concluded in February 2011. Beef still remains classified as a 'sensitive item' by Japan in the FTA/EPA negotiations.

- There has been a new political push by the ruling party (Democratic Party of Japan) to invigorate Japan's economy via freer trade and Japan has seen renewed discussion and debate regarding both Japan's participation in the Trans Pacific partnership (TPP) and the Australia-Japan FTA. While opposition from agricultural lobby groups remains strong, there is considerable support amongst key Japanese ministries for the conclusion of a comprehensive and high quality trade agreement.

- Mexico has an FTA with Japan which currently allows reduced tariff rates for up to 6,000 tonnes of beef and offal products per year[6]. Japan imported 11,938 tonnes swt of Mexican beef in 2010, up 24% from the previous year.

Outlook

- Japanese demand for beef is expected to gradually recover in 2011 and beyond, assisted by the increase in beef imports from the US, Japan's economic improvement and subsequent lift in consumer spending. However, consumption will hinges largely upon the pace of the economic recovery, providing there are no further major real or perceived health scares, and the cost of local and imported beef.

- For Australia, the increased presence of US beef in the market, the robust A$, and strong demand for Australian beef from other international markets and on the domestic market will continue to place pressure upon exports to Japan. Hence, despite anticipated higher Australian supplies and some demand improvement in Japan in 2011, MLA forecasts Australian beef exports to Japan to remain around 355,000 tonnes swt for the third year in succession.

- The current bi-lateral import protocol on US beef could be reviewed sometime during 2011, with the possibility of the age restriction being raised to 30 months. The change will significantly lift the availability of US product eligible for export to the market. The entire review and law alteration steps would be expected to take many months to complete, due to Japan's evaluation processes, including a proposal to the Japan's Food Safety Commission. Hence, any change is unlikely to significantly impact the market before 2012.

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[5] The safeguard is a mechanism agreed upon with Japan in the Uruguay Round of World Trade Organization negotiations (1994). It gives Japan the option to increase the beef tariff from 38.5% to 50%, for the remainder of the Japanese fiscal year, once the trigger level is exceeded. The Japanese fiscal year (JFY) runs from April to March, with trigger levels calculated to be 17% higher than imports for the same period in the previous year (calculated on a cumulative quarterly basis and separately for chilled and frozen beef). Trigger levels and imports are calculated on a customs cleared basis. See Appendix 2 for trigger levels in the JFY 2009 (April 2009 to March 2010).

[6] The in-quota tariff for beef (chilled or frozen) is 30.8%.

Appendix 1

Summary of BSE testing in Japan

1996	Japan implemented a BSE surveillance program
1996 – 2001	2,247 head of cattle were tested for BSE
Sep-01	BSE first discovered in Japan
Oct-01	Implementation of BSE testing on all slaughtered cattle of all ages
Apr-03	BSE testing target animals expanded to include dead cattle above 24 months of age
Sep-05	BSE test target age range for slaughtered cattle changed from all ages to above 21 months of age, after Japan's Food Safety Commission's BSE risk assessment. Despite this, voluntary testing of all ages was continued by prefectural governments, with funds for test kits provided by the Japanese government
Dec-06	MLHW confirmed in its budget paper that funding for BSE testing of cattle under 21 months of age will be discontinued by the end of July 2008
Aug-08	All prefectural councils with cattle processing facilities in Japan continue BSE testing of cattle under 21 months of age, despite the funds for test kits discontinued by the Japanese government
2010	Prefectural councils continued BSE testing of cattle under 21 months of age.

Appendix 2

Safeguard trigger levels of JFY 2010 (April 2010 to March 2011)

	Chilled			Frozen		
Cumulative quarters	**Trigger level JFY 2010**	**Imports JFY 2009**	**Imports JFY 2010**	**Trigger level JFY 2010**	**Imports JFY 2009**	**Imports JFY 2010**
April-June	**74,339**	55,213	55,914	***75,072**	64,164	67,636
April-Sept.	**152,455**	110,684	112,471	**160,040**	132,014	149,982
April-Dec.	**230,642**	163,628	164,813	**246,871**	203,230	226,039
April-March	**292,354**	209,769		**323,924**	260,500	

* Based on 2009 figures

Note:

Japan's Ministry of Finance set the safeguard trigger levels for beef for the current Japanese Fiscal Year (JFY) 2010, running from April 2010 to March 2011.

The calculation method was again altered for JFY 2010 (fifth time since the first alteration for JFY 2006) under the extended Temporary Tariff Measures Law, in recognition of the extraordinary circumstance generated by the lifting of the ban on imports from the US. The safeguard for JFY 2010 is based on an average of actual imports in JFY 2002 and 2003. In the event that the trigger level based on the JFY 2002 and 2003 import average is below the trigger level calculated on the basis of imports in JFY 2009, the 2009 figure will be employed instead.

Appendix 3

Summary of BSE incidents and US beef imports

Calender year 2000	Consumption peaked at 1,082,325 tonnes
September 2001	Announcement of first case of BSE in Japan on 10th September
Calender year 2002	Beef consumption dropped to a record low since market liberation – 910,591 tonnes
December 2003	Beef demand recovered strongly, with imports from the US at 267,277 tonnes and Australia 283,698 tonnes
	First case of BSE in US announced on the 23rd December and imports from US suspended
Calender year 2004	Consumption of beef dropped again to 806,456 tonnes
December 2005	Resumption of US imports on 12th December, with bi-laterally agreed import protocols (age restriction of under 21 months** and removal of SRMs***)
January 2006	Second suspension of US imports from 20th January, following the discovery of SRMs in one shipment
July 2006	Resumption of imports approved by Japan's Food Safety Commission on 27th July Mandatory inspections of all boxes were added to the existing import protocols
Calender year 2006	Japan imported 7,321 tonnes of US beef in 2006 – only 2.7% of the level in 2003
May 2007	The world animal health organization (OIE) granted US "controlled risk" BSE status
June 2007	Requirement of 100% box inspections was lifted. Random box inspections continue, as well as boxes containing beef offals are still subject to 100% inspections.
Calender year 2007	Japan imported 34,148 tonnes of US beef in 2007 – 13% of the level in 2003
April 2008	SRM found in one of 700 boxes at a Yoshinoya gyudon (beef rice bowl) factory in Tokyo. Imports from a National Beef plant was suspended
May 2008	Retail giant Aeon group resumed sales of US beef at selected outlets.
June 2008	Resumption of US beef imports in Korea, after months of political turmoil and public protests
Calender year 2008	Japan imported 54,109 tonnes of US beef in 2008 – 20% of the level in 2003
January 2009	Announcement of the 36th case of BSE in Japan
May 2009	The world animal health organization (OIE) granted Japan "controlled risk" BSE status
Calender year 2009	Japan imported 69,193 tonnes of US beef in 2009 – 26% of the level in 2003
April 2010	Outbreak of foot-and-mouth disease in the Miyazaki prefecture
August 2010	Miyazaki prefecture declared 'FMD free" status
September 2010	The US-Japan technical meeting was held in San Francisco, concerning BSE counter measures.
December 2010	Leading foodservice group Zensho resumed serving US beef at selected yakiniku outlets, while it continues to use Australian for gyudon dishes.
Calender year 2010	Japan imported 91,618 tonnes of US beef in 2010 – 34% of the level in 2003

Source: ALC / MLA

* Bovine Spongiform Encephalopathy
** as verified by birth certificate or USDA A40 grade
*** Specified Risk Material

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