2023年7月度 市場動向資料集

July 2023 Market Trends

日本ハム株式会社

NH Foods Ltd.

August 25, 2023

Nipponham Group

本資料のいかなる情報も、弊社株式の購入や売却等を勧誘するものではありません。

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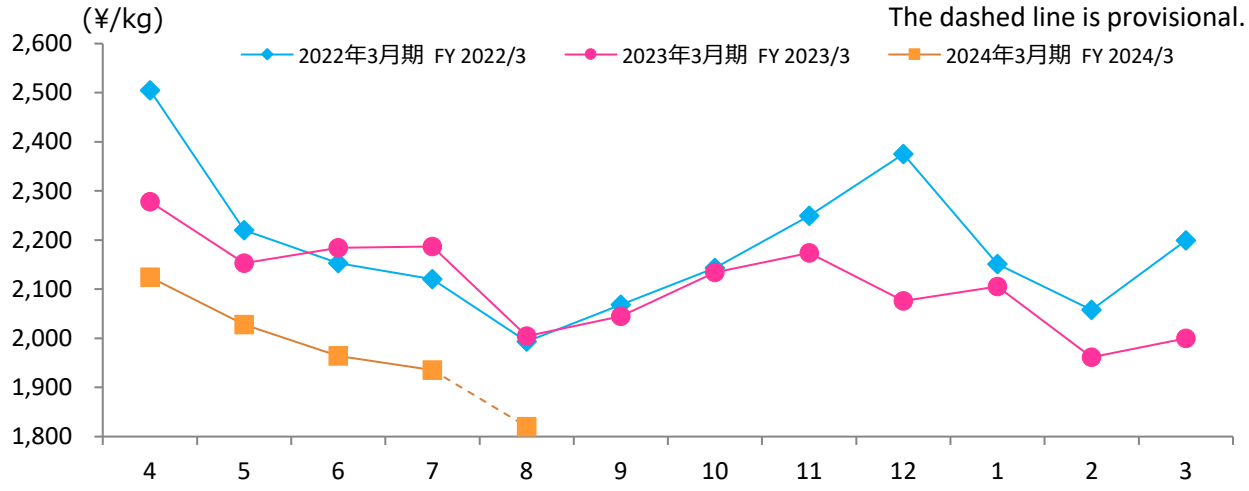
牛肉相場価格 / Beef Prices

【去勢和牛　A-3卸売価格（東京市場、税込）】
Tokyo Market A-3 Wagyu Steer Prices, Tax Included

※破線は暫定値
The dashed line is provisional.



A-3：格付けランク、歩留まり等級A～C / 肉質等級1～5
Yield Grade A-C / Meat Quality Grade 1-5

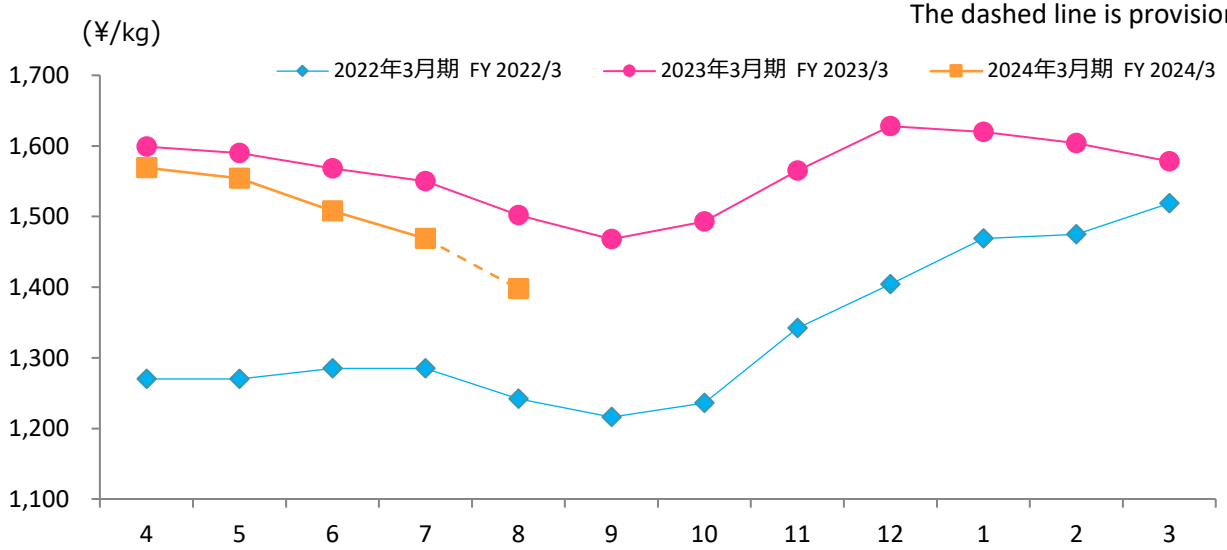
(¥/kg)

前期差(2022年3月比) Comparison with the previous year	**前月差**(2月比) Comparison with The previous month
-252	-29

グラフ資料出所：東京食肉市場株式会社
Date Source: Tokyo Meat Market Co. Ltd

【豪州産チルドビーフ　ショートグレインフルセット価格】
Australian Chilled Beef [Full Set (Short Grain Fed)] Prices

※破線は暫定値
The dashed line is provisional.



ショートグレイン：穀物肥育期間 100日以上
Short Grain Fed: Grain Fed period 100 days or more
フルセット：セット販売(基本12部位) ⇔パーツ販売
Full Set: Set Price of primal 12 items ⇔ Single item Sales

(¥/kg)

前期差(2022年3月比) Comparison with the previous year	**前月差**(2月比) Comparison with The previous month
-81	-39

グラフ資料出所：食品産業新聞社畜産日報掲載分から単純平均単価
Date Source: "DAILY MEAT ＆LIVESTOCK" which is a trade business paper published in Japan (all graphs based on average prices)

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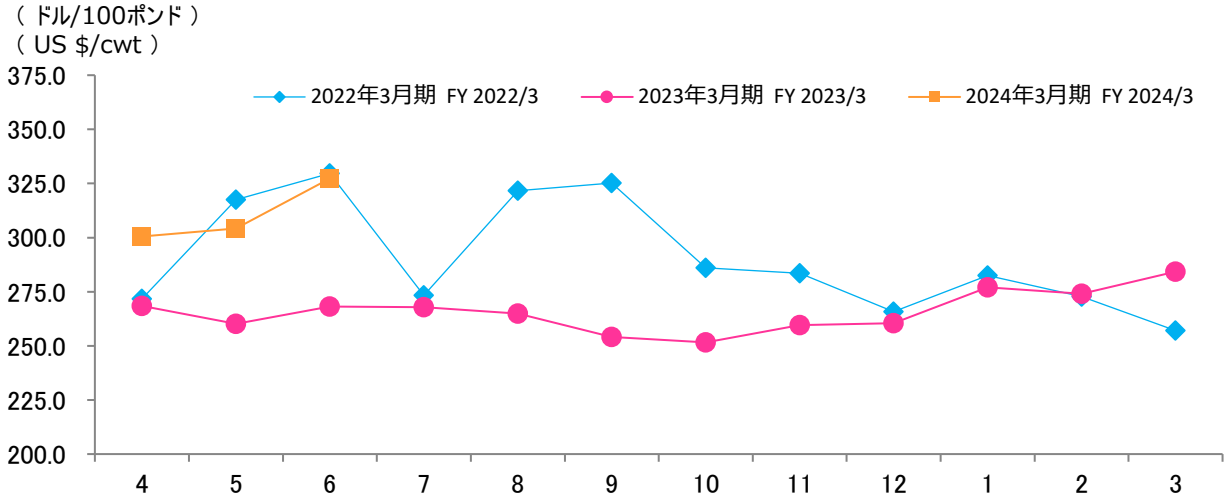
牛肉相場価格 / Beef Prices

【米国産　牛肉カットアウトバリュー 枝肉ベース】
U.S. Beef Boxed cutout, Choice 1-3, 600-900 lbs



カットアウトバリュー：各部分肉の卸売価格を1頭分の枝肉に再構成した卸売指標価格
Cutout Value: The gross value of a beef carcass based on prices paid for individual beef items derived from the carcass

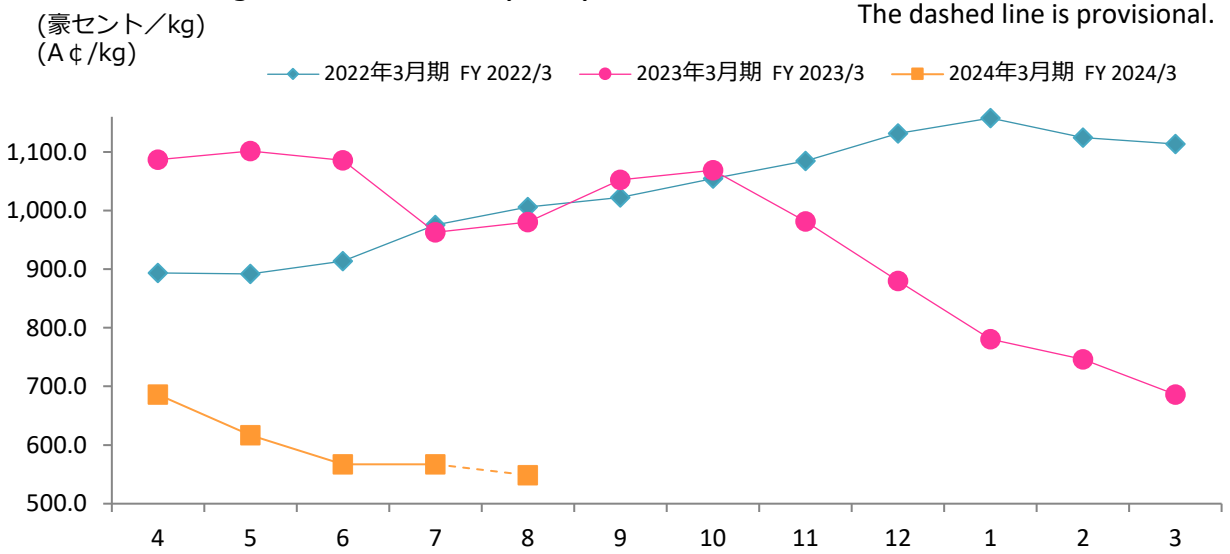
（ドル/100ポンド）
（US $/cwt）

前期差 Comparison with the previous year	前月差 Comparison with The previous month
59.1	23.0

グラフ資料出所：米国食肉輸出連合会
Source: U.S. Meat Export Federation

【豪州産　若齢牛価格(生産者販売価格)】
Eastern Young Cattle Indicator（EYCI）

※破線は暫定値
The dashed line is provisional.



若齢牛価格：豪州東部3州の主要家畜市場の若齢牛の加重平均取引価格
EYCI: Weighted average price of young cattle in the major livestock market in the three eastern Australia states

(豪セント／kg)
(A¢/kg)

前期差(2022年3月比) Comparison with the previous year	前月差(2月比) Comparison with The previous month
-396.1	-0.2

グラフ資料出所：豪州食肉家畜生産者事業団
Source：MEAT & LIVESTOCK AUSTRALIA

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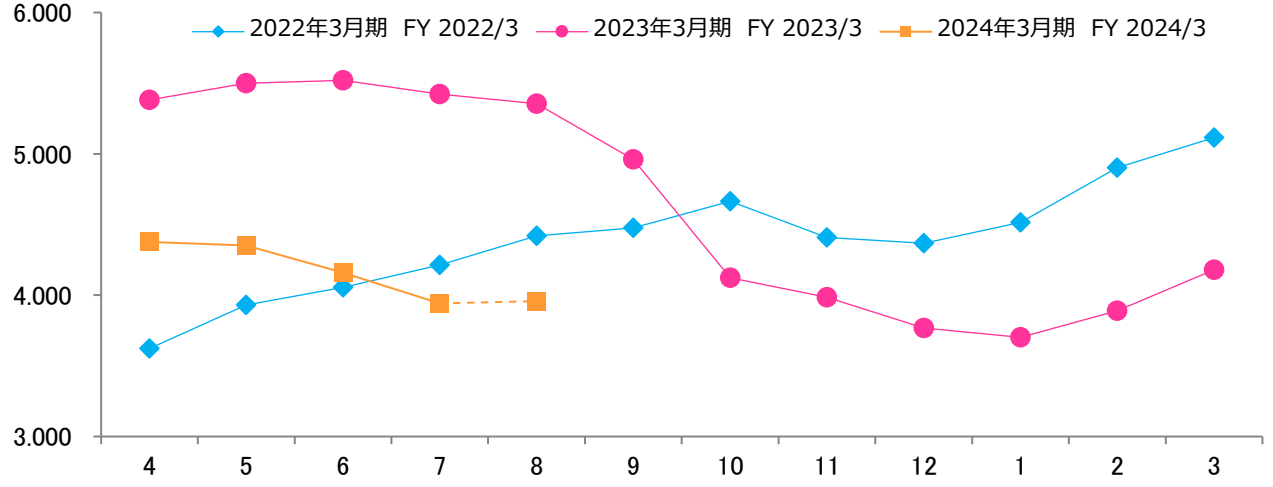
牛肉相場価格 / Beef Prices

【ウルグアイ 牛価格 生体ベース】
Uruguay cattle prices, ＞380kg



（USドル/kg）
（US $/kg）

前期差(2022年3月比) Comparison with the previous year	**前月差**(2月比) Comparison with The previous month
-1.483	-0.218

グラフ資料出所：ウルグアイINAC
Source: Instituto Nacional de Carnes

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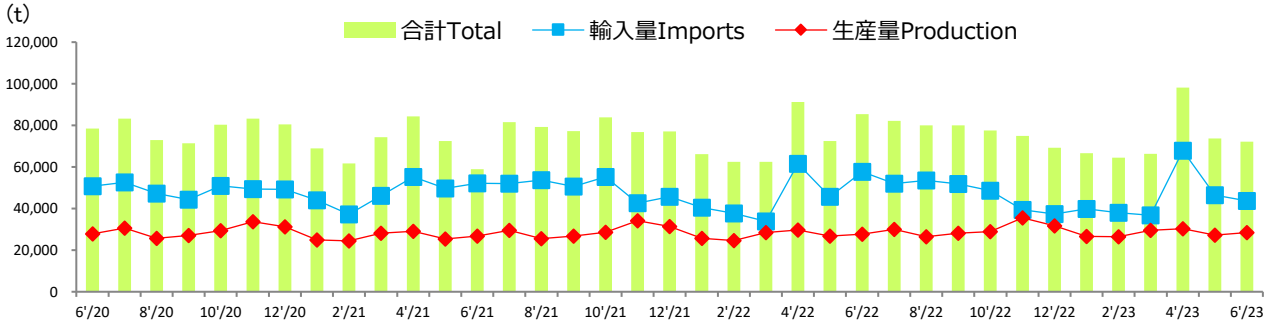
牛肉需給量推移 / Beef Supply and Demand Trends

Nipponham Group

グラフ資料出所：農畜産業振興機構
Source: Agriculture & Livestock Industries Corporation

注：数量は部分肉ベース。輸入量は煮沸肉並びにくず肉のうちほほ肉及び頭肉のみ含む。
Notes: 1. Boneless cuts equivalent
2. Figures for stocks are estimated by ALIC

【生産量と輸入量】
Production and Imports

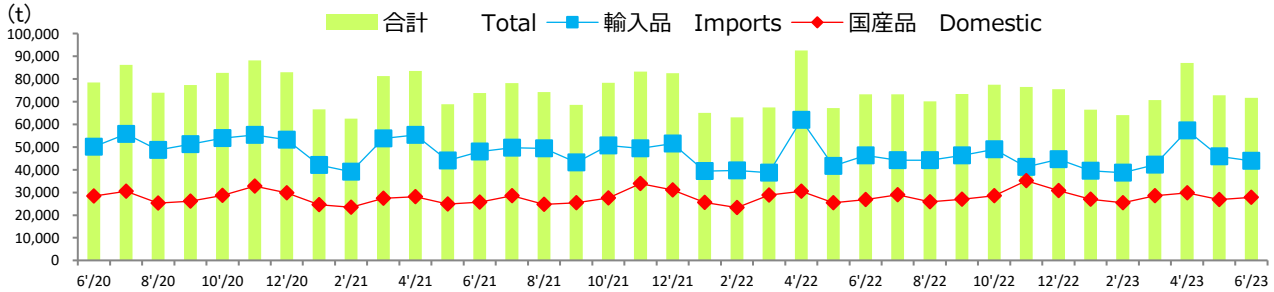


(t)

	前期差 Comparison with The previous year	前月差 Comparison with The previous month
輸入量 Imports	-14,000	-2,796
生産量 Production	752	1,125

【推定出回り量】
Estimated Marketing Quantity

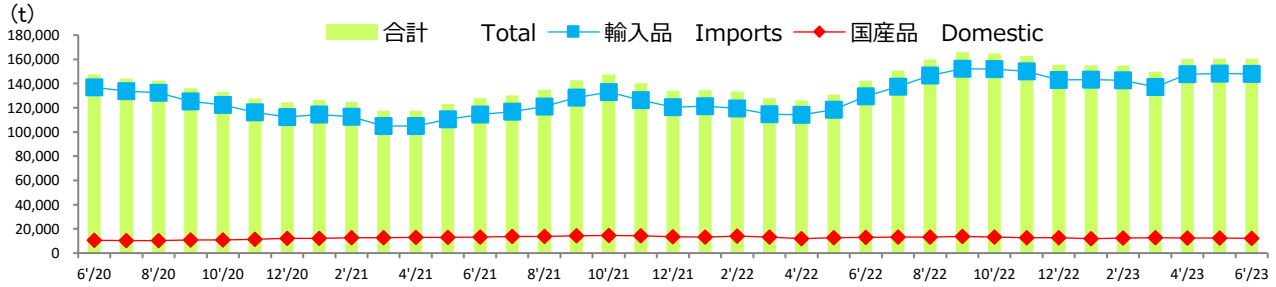
推定出回り量：推定期首在庫+生産量+輸入量-輸出量-推定期末在庫
Estimated marketing quantity: Estimated beginning stock stock +Production+Imports-Exports-Estimated ending stock



(t)

	前期差 Comparison with The previous year	前月差 Comparison with The previous month
輸入品 Imports	-2,461	-2,011
国産品 Domestic	936	957

【推定期末在庫】
Estimated Ending Stock



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	前期差 Comparison with The previous year	前月差 Comparison with The previous month
輸入品 Imports	18,645	-252
国産品 Domestic	-575	-9

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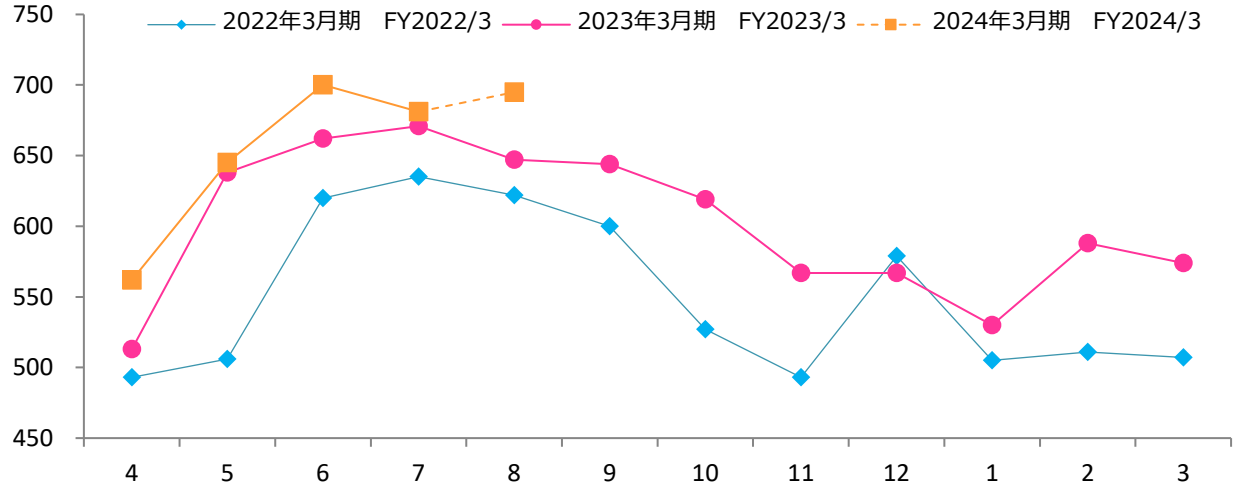
豚肉相場価格 / Pork Prices

【豚肉枝肉卸売価格　上物　東京食肉市場平均価格　税込】
Pork Carcass Prices (Tokyo Market Excellent Grade, monthly average, Tax Included)
(¥/kg)

※破線は暫定値
The dashed line is provisional.



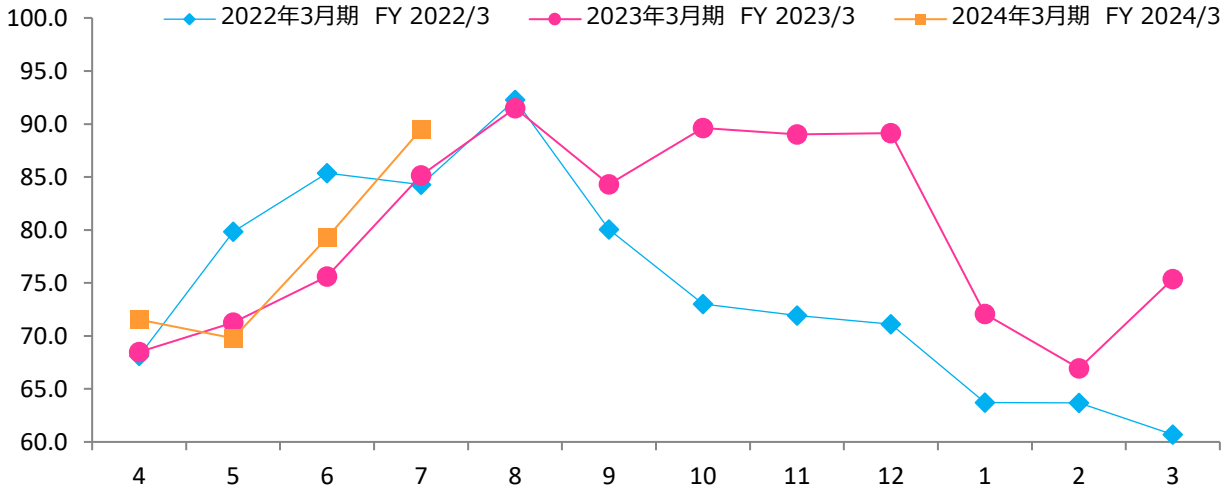
上物：等級(極上、上、中、並、等外)

(¥/kg)

前期差(2022年3月比) Comparison with the previous year	**前月差**(2月比) Comparison with The previous month
10	-19

グラフ資料出所：東京食肉市場株式会社
Date Source:　Tokyo Meat Market Co.　Ltd

【U.S.ウデ（英名：ピクニック）価格　現地価格】
U.S. Pork (Picnic) Prices
(US$/cwt)



ウデ：加工豚肉原料
Picnic: Mainly used for processed pork

(US$/cwt)

前期差 Comparison with the previous year	**前月差** Comparison with The previous month
4.3	10.2

グラフ資料出所：米国食肉輸出連合会(USMEF)
Date Source: U.S. Meat Export Federation (USMEF)

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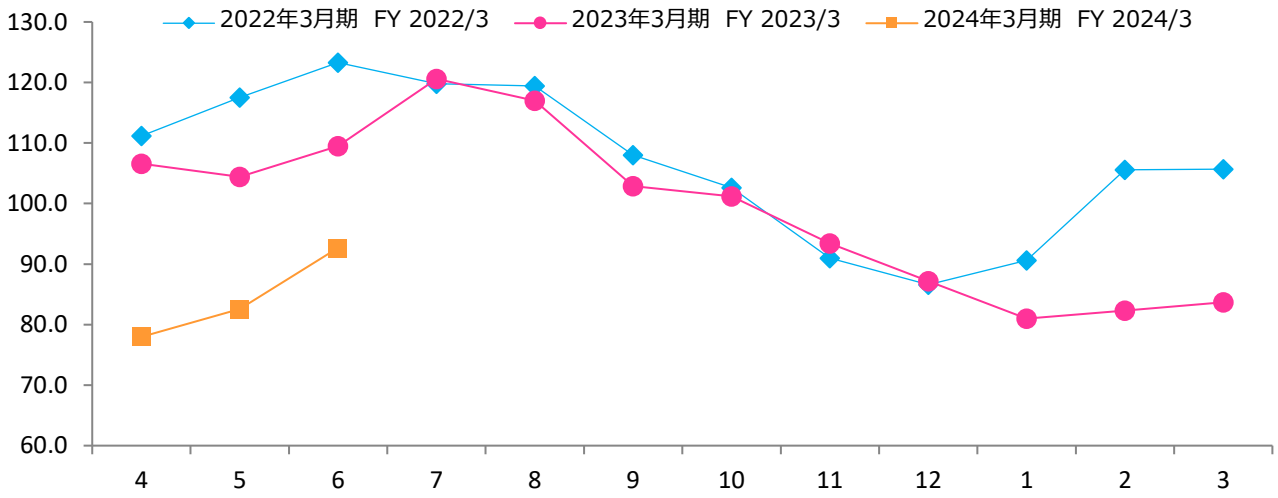
豚肉相場価格 / Pork Prices

【米国産　豚肉カットアウトバリュー 枝肉ベース】
U.S. Pork Cutout composite carcass, 53-54% lean
（ドル/100ポンド）
（US $/cwt）

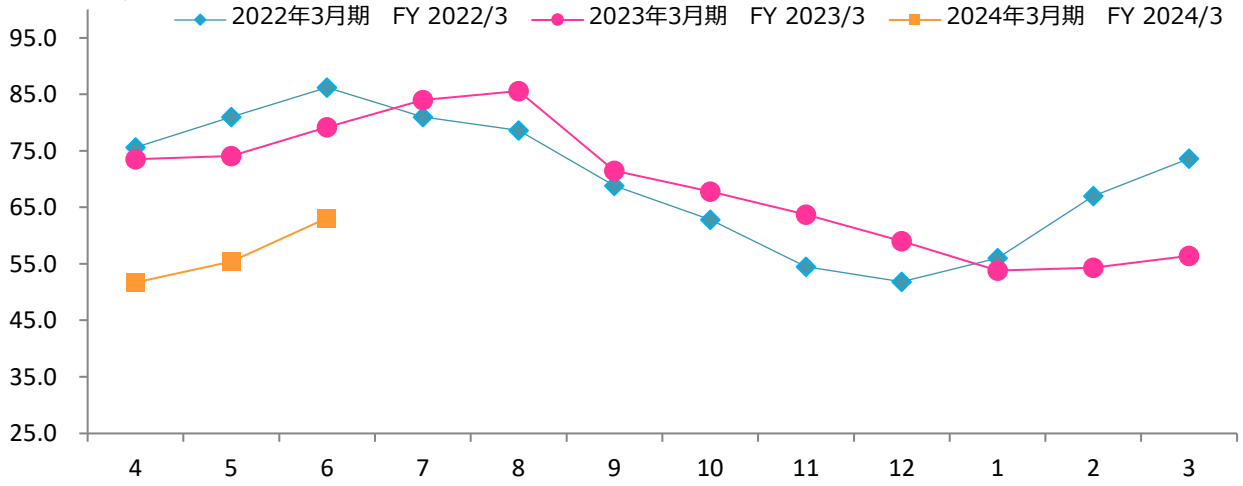


（ドル/100ポンド）
（US $/cwt）

前期差 Comparison with the previous year	前月差 Comparison with The previous month
-16.8	10.1

グラフ資料出所：米国食肉輸出連合会
Source: U.S. Meat Export Federation

【米国産　肥育豚価格(生産者販売価格)】
Live U.S. Fattening Pig Prices (Pig Sales Price)
（セント/ポンド）
（US ¢/lb）



（セント/ポンド）
（US ¢/lb）

前期差 Comparison with the previous year	前月差 Comparison with The previous month
-16.1	7.7

グラフ資料出所：農畜産業振興機構（全て単純平均単価）
Source: Agriculture & Livestock Industries Corporation (all graphs based on average prices)

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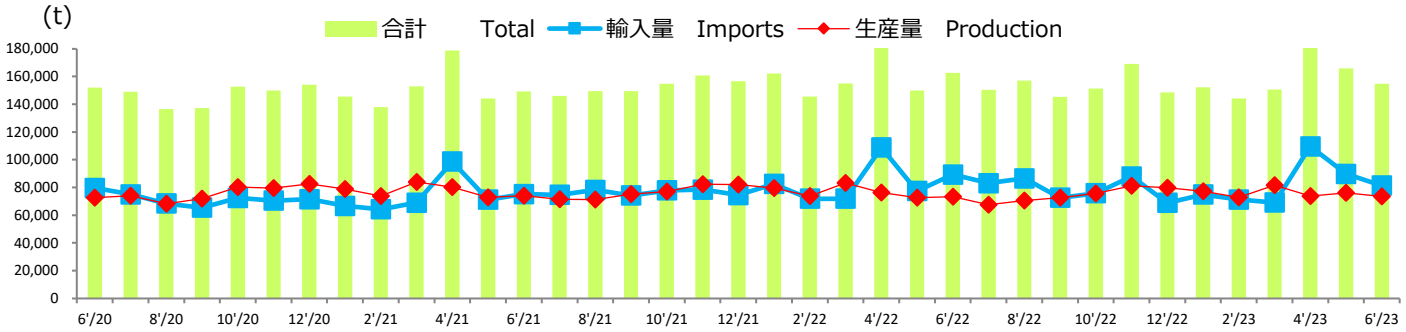
豚肉需給量推移 / Pork Supply and Demand Trends

Nipponham Group

【生産量と輸入量】
Production and Imports



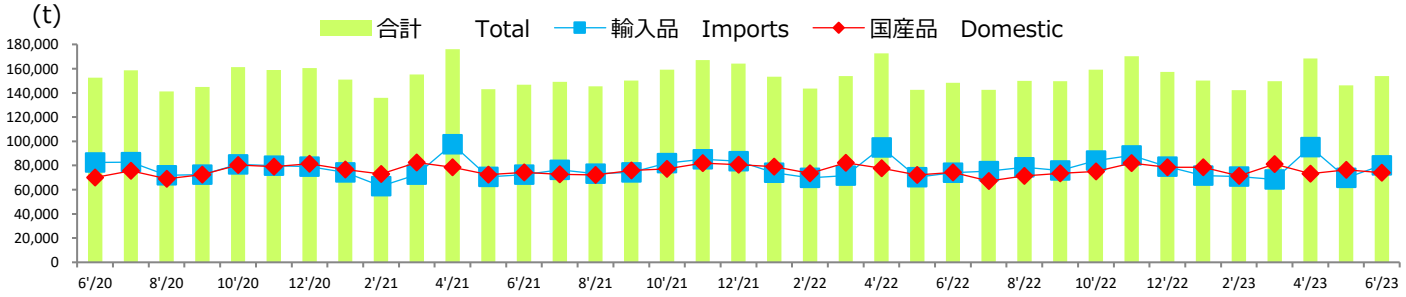
グラフ資料出所：農畜産業振興機構
Source: Agriculture & Livestock Industries Corporation

注：数量は部分肉ベース。輸入量は煮沸肉並びにくず肉のうちほほ肉及び頭肉のみ含む。
Notes: 1. Boneless cuts equivalent
2. Figures for stocks are estimated by ALIC

(t)

	前期差 Comparison with The previous year	前月差 Comparison with The previous month
輸入量 Imports	-7,977	-8,418
生産量 Production	293	-2,630

【推定出回り量】
Estimated Marketing Quantity

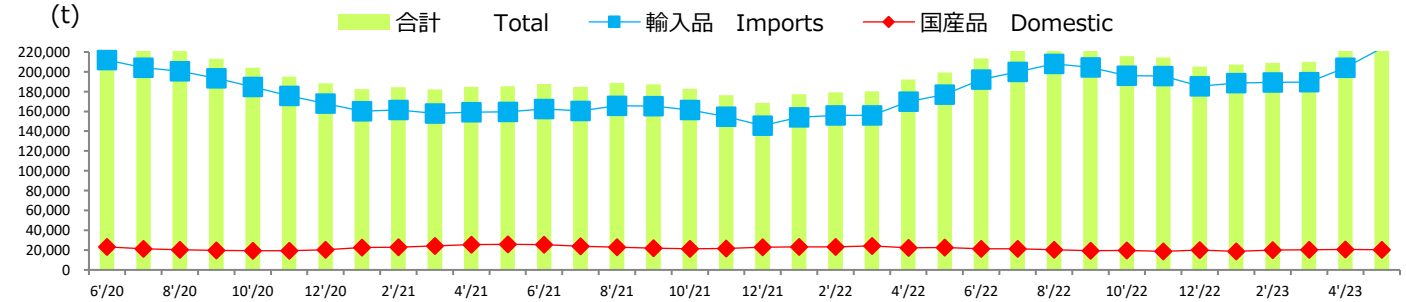


推定出回り量：推定期首在庫+生産量+輸入量-輸出量-推定期末在庫
Estimated marketing quantity: Estimated beginning stock stock +Production+Imports-Exports-Estimated ending stock

(t)

	前期差 Comparison with The previous year	前月差 Comparison with The previous month
輸入品 Imports	6,035	10,133
国産品 Domestic	-425	-2,444

【推定期末在庫】
Estimated Ending Stock



(t)

	前期差 Comparison with The previous year	前月差 Comparison with The previous month
輸入品 Imports	32,931	1,306
国産品 Domestic	-1,567	-607

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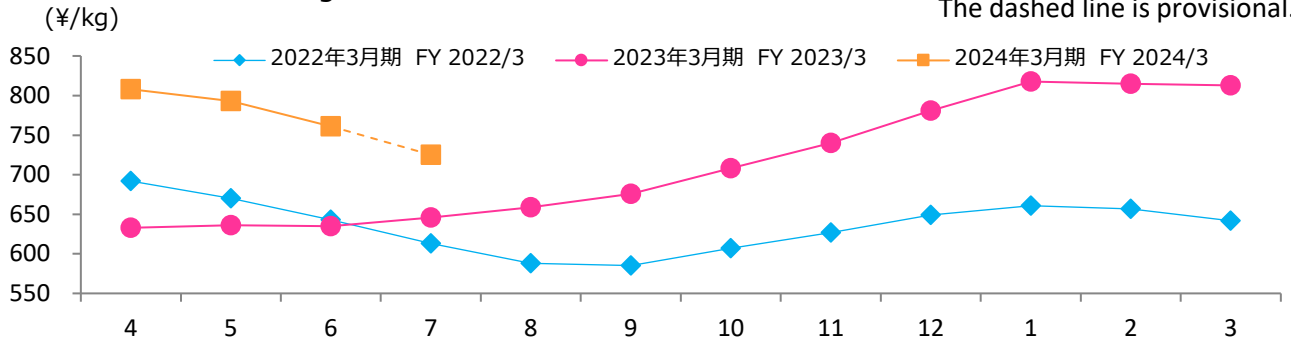
鶏肉相場価格 / Chicken Prices

Nipponham Group

グラフ資料出所： ALIC (農林水産省「食鳥市況情報」)、食品産業新聞社畜産日報掲載分から単純平均単価
Date Source : ALIC (MAFF "Survey of Broiler Wholesale price")
DAILY MEAT & LIVESTOCK" which is a trade business paper published in Japan(all graphs based on Average Price)

【国産鶏肉卸売価格（もも肉、税抜）】
Domestic Chicken Thigh Meat　Wholesale Prices

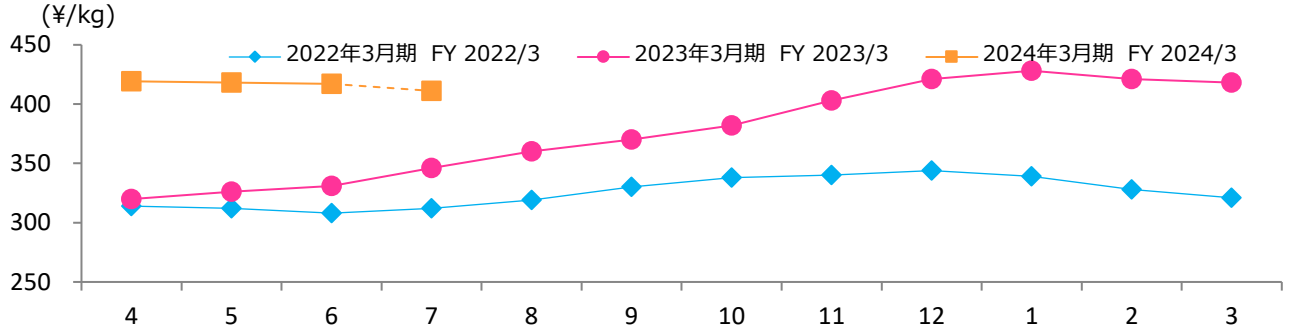
※破線は暫定値
The dashed line is provisional.



(¥/kg)

前期差(2022年3月比) Comparison with the previous year	前月差(2月比) Comparison with The previous month
79	-36

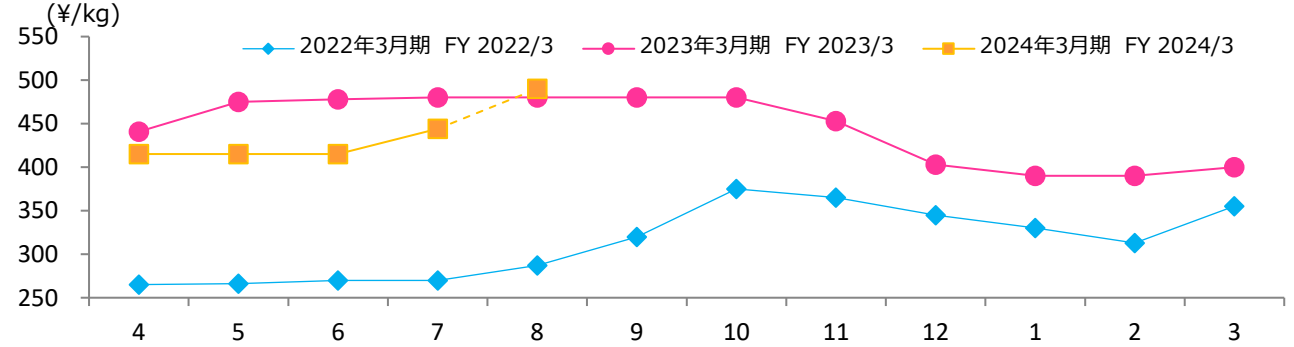
【国産鶏肉卸売価格（むね肉、税抜）】
Domestic Chicken Breast Meat　Wholesale Prices



(¥/kg)

前期差(2022年3月比) Comparison with the previous year	前月差(2月比) Comparison with The previous month
65	-6

【ブラジル産もも肉価格】
Brazilian Chicken Thigh Prices



(¥/kg)

前期差(2022年3月比) Comparison with the previous year	前月差(2月比) Comparison with The previous month
-36	29

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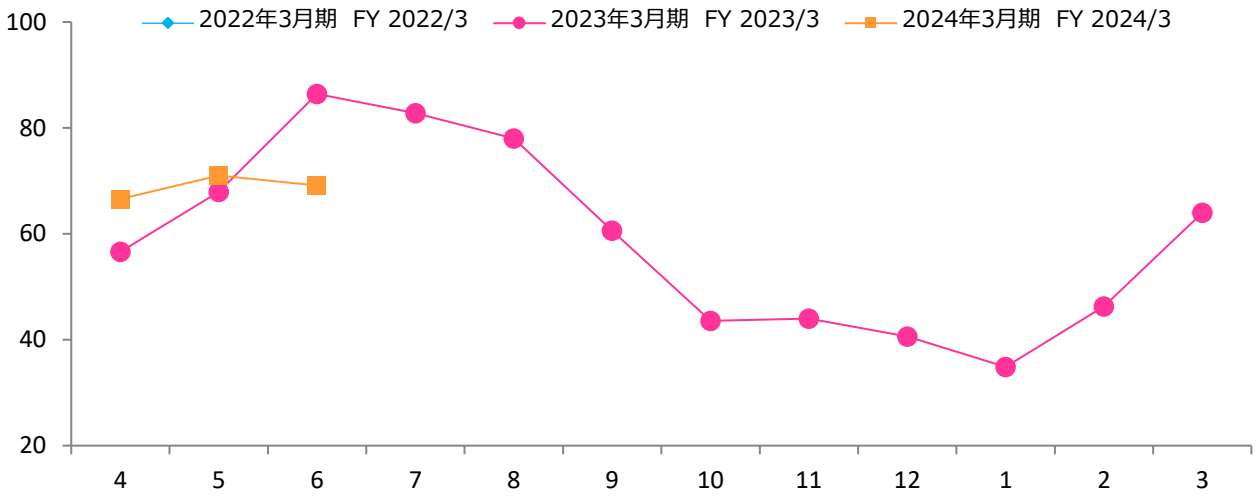
鶏肉相場価格 / Chicken Prices

【米国産もも肉価格】
U.S. Chicken Thigh Prices
（セント/ポンド）
（US ¢/lb）



（セント/ポンド）
（US ¢/lb）

前期差 Comparison with the previous year	前月差 Comparison with The previous month
-17.3	-1.9

グラフ資料出所：農畜産業振興機構
Source: Agriculture & Livestock Industries Corporation

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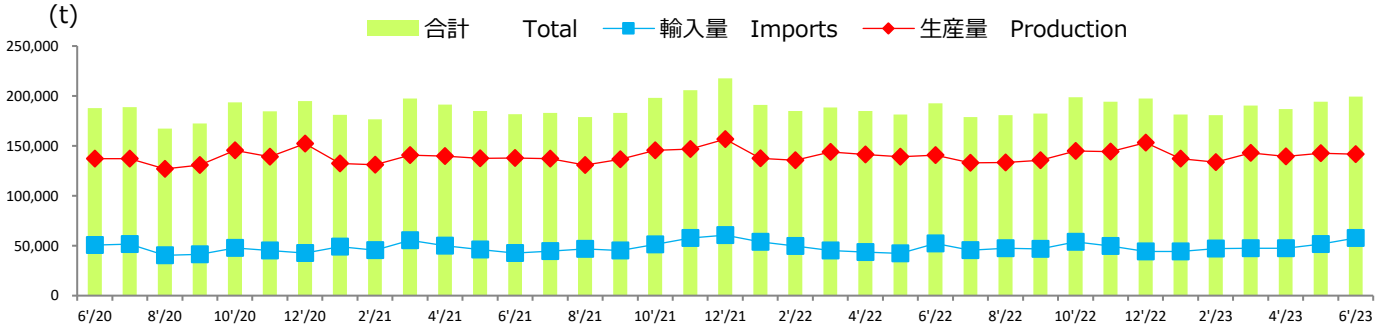
鶏肉需給量推移 / Chicken Supply and Demand Trends

Nipponham Group

【生産量と輸入量】
Production and Imports

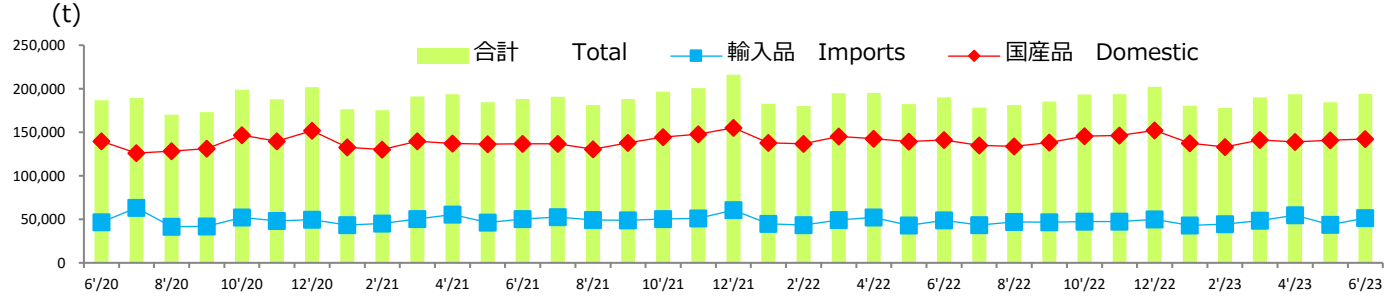


グラフ資料出所：農畜産業振興機構
Source：Agriculture & Livestock Industries Corporation
注：生産量は骨付き肉ベース。成鶏肉を含む。輸入量には鶏肉以外の家禽肉を含まない。
注：生産量、国産品の推定出回り量は2010年2月をもって公表終了。
Notes：1. ★Bone in cuts equivalent
2. Figures for stocks are estimated by ALIC
3. ★The production quantity and the estimated marketing quantity on the domestic one are made public only until February,2010.

(t)

	前期差 Comparison with The previous year	前月差 Comparison with The previous month
輸入量 Imports	5,530	5,989
生産量 Production	967	-1,112

【推定出回り量】
Estimated Marketing Quantity

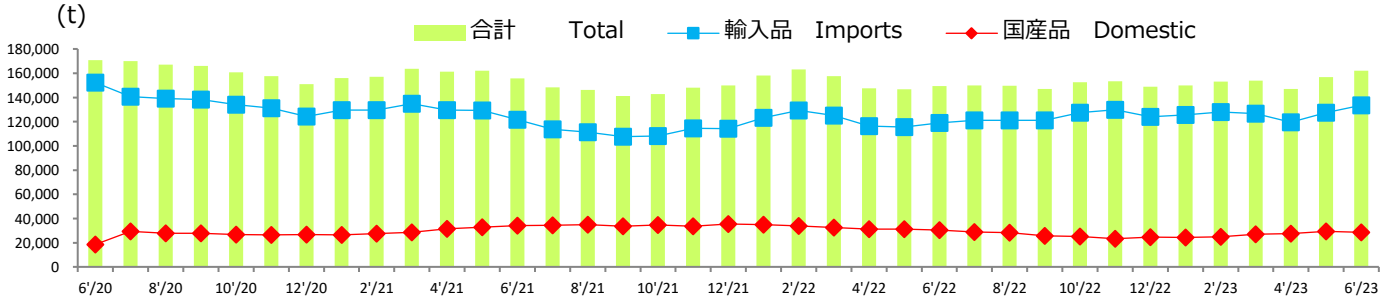


推定出回り量：推定期首在庫+生産量+輸入量-輸出量-推定期末在庫
Estimated marketing quantity: Estimated beginning stock stock +Production+Imports-Exports-Estimated ending stock

(t)

	前期差 Comparison with The previous year	前月差 Comparison with The previous month
輸入品 Imports	2,771	7,877
国産品 Domestic	1,066	1,429

【推定期末在庫】
Estimated Ending Stock



(t)

	前期差 Comparison with The previous year	前月差 Comparison with The previous month
輸入品 Imports	14,560	6,111
国産品 Domestic	-1,918	-745

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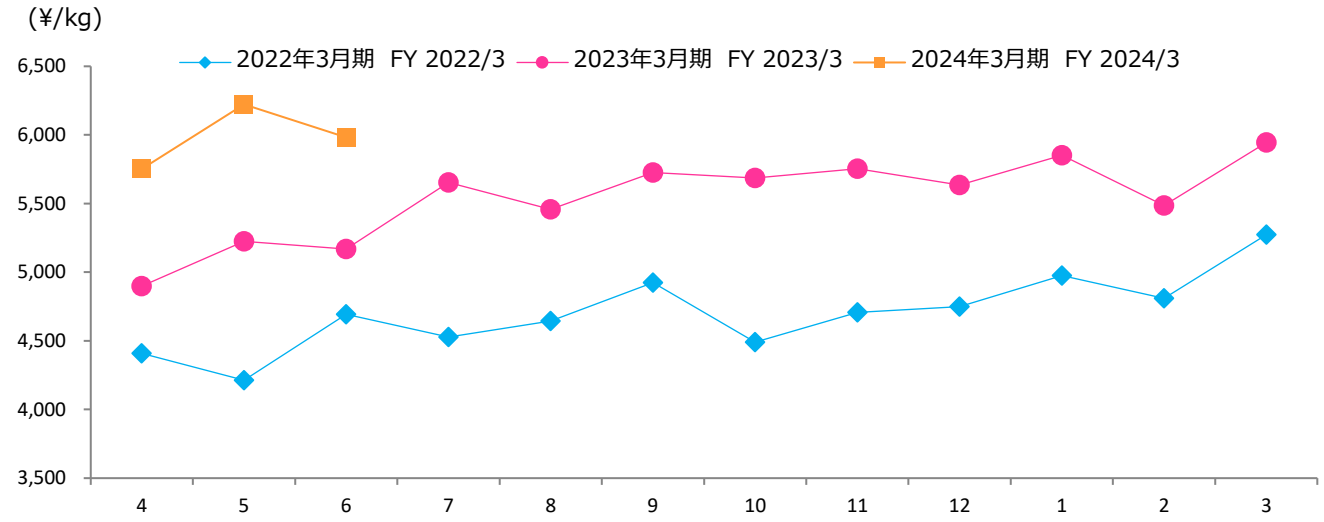
副原料相場価格 / Market Price for Auxiliary Materials

【天然腸輸入価格】※主に羊腸(豚腸・牛腸等も含む)
Natural Casing (CIF) Mainly seep casing including pork & beef casing

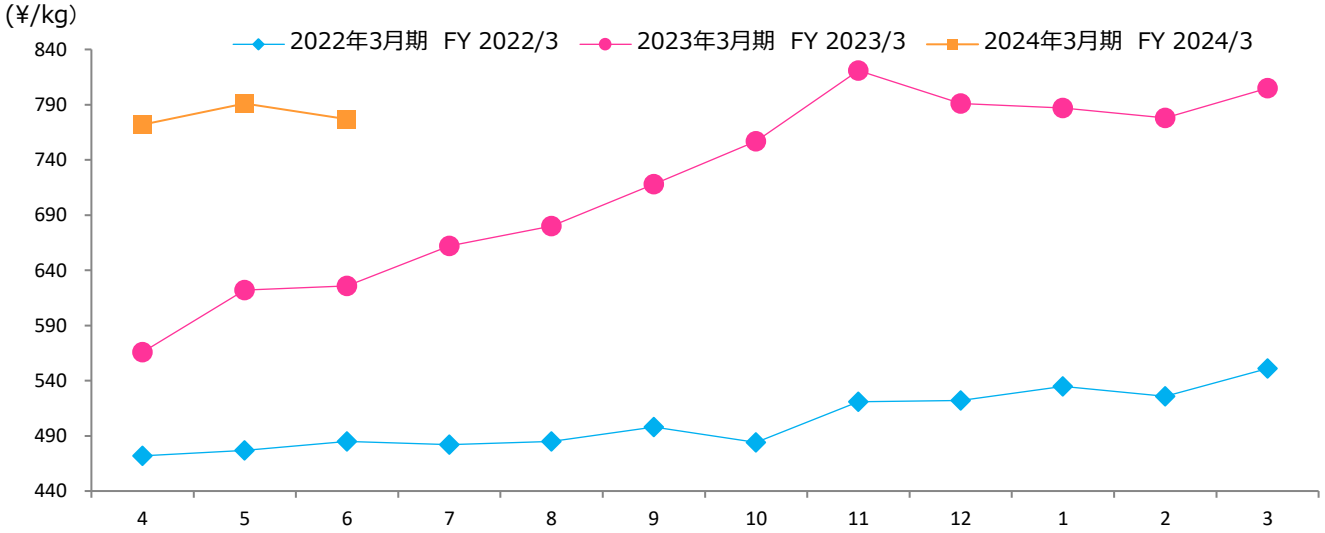


(¥/kg)

前期差 Comparison with the previous year	前月差 Comparison with The previous month
814	-240

グラフ資料出所：財務省貿易統計（金額÷数量で算出）
Source: Trade Statistics of Japan (Calculated by amount/quantity)

【ナチュラルチーズ輸入価格】
Natural cheese(CIF)



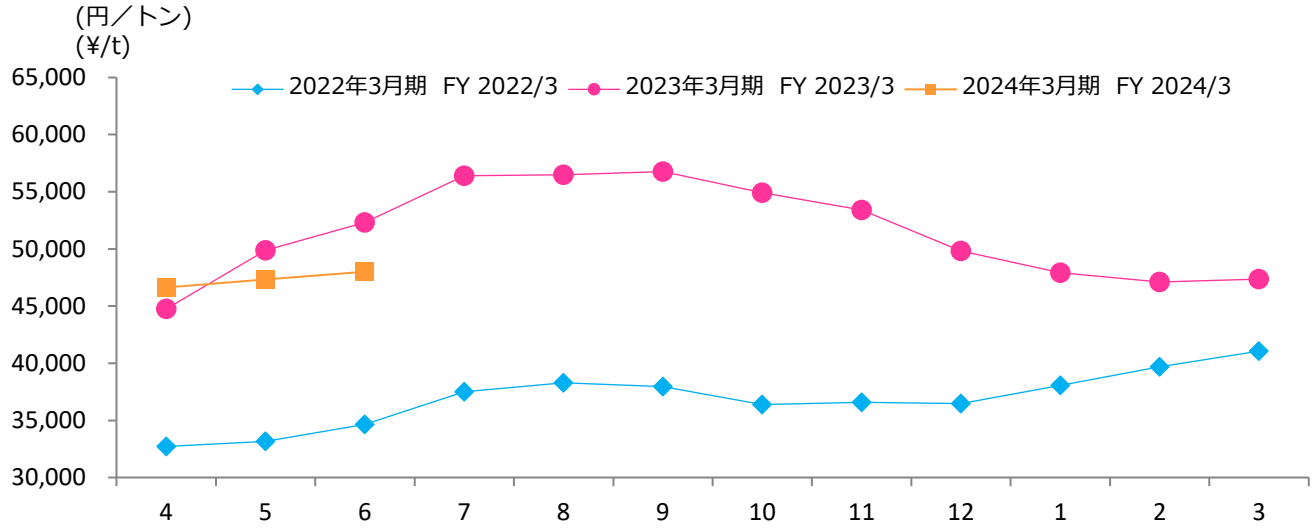
(¥/kg)

前期差 Comparison with the previous year	前月差 Comparison with The previous month
151	-14

グラフ資料出所：農畜産業振興機構（全て単純平均単価）
Source: Agriculture & Livestock Industries Corporation (all graphs based on average prices)

飼料相場 / Market Trends in Grain Feed Prices

【とうもろこしの輸入価格】
Imported Corn Prices

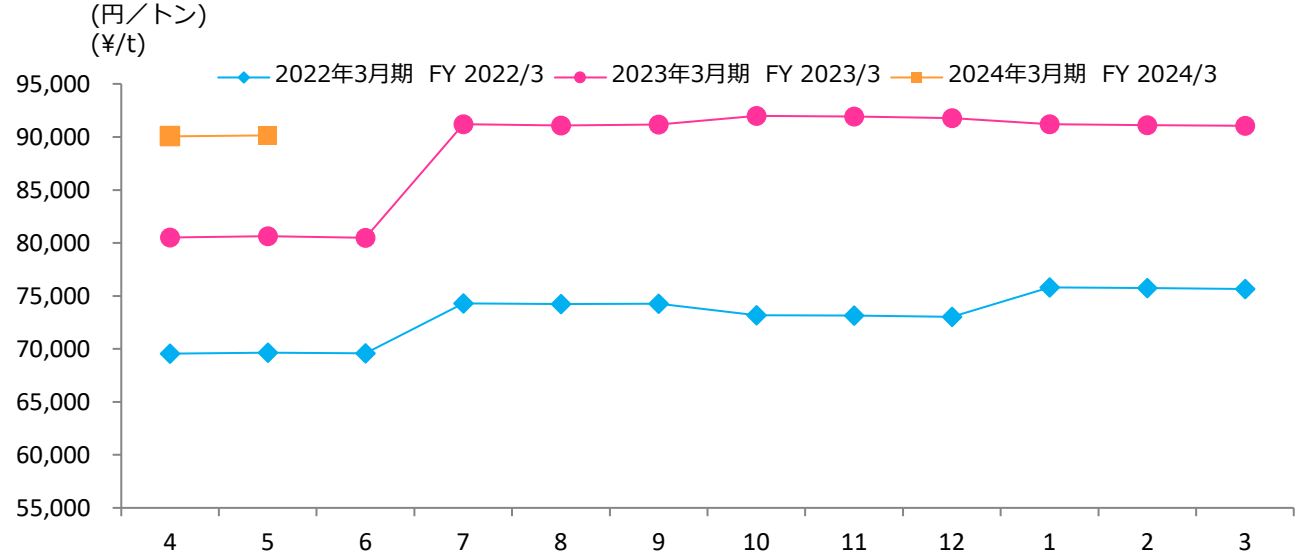


(円／トン)
(¥/t)

前期差 Comparison with the previous year	前月差 Comparison with The previous month
-4,311	687

グラフ資料出所：農畜産業振興機構（全て単純平均単価）
Source: Agriculture & Livestock Industries Corporation (all graphs based on average prices)

【配合飼料の価格】
Mixed Feed Prices



(円／トン)
(¥/t)

前期差 Comparison with the previous year	前月差 Comparison with The previous month
9,510	75

グラフ資料出所：農畜産業振興機構（全て単純平均単価）
Source: Agriculture & Livestock Industries Corporation (all graphs based on average prices)

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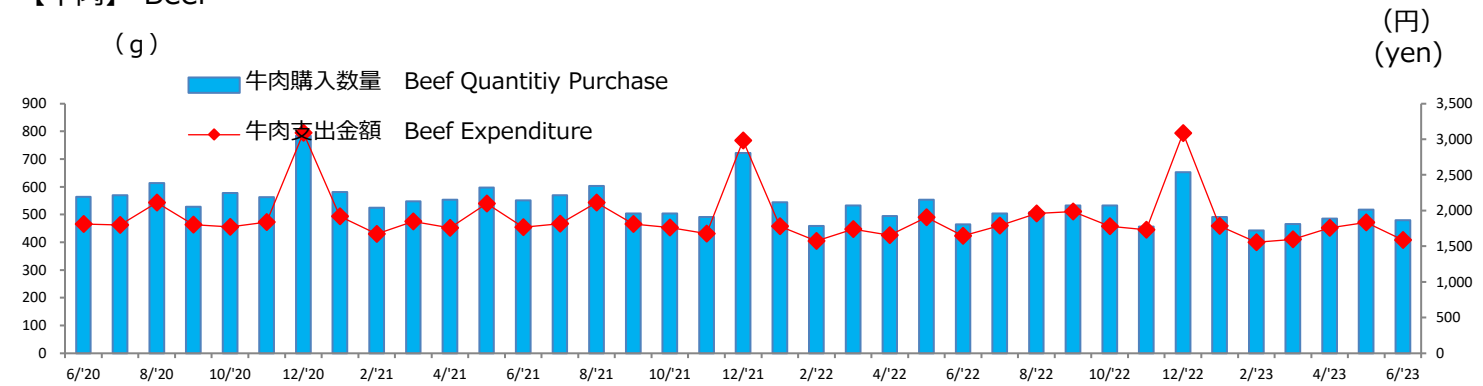
家計調査 / Family Income and Expenditure Survey by Types of Meat

Nipponham Group

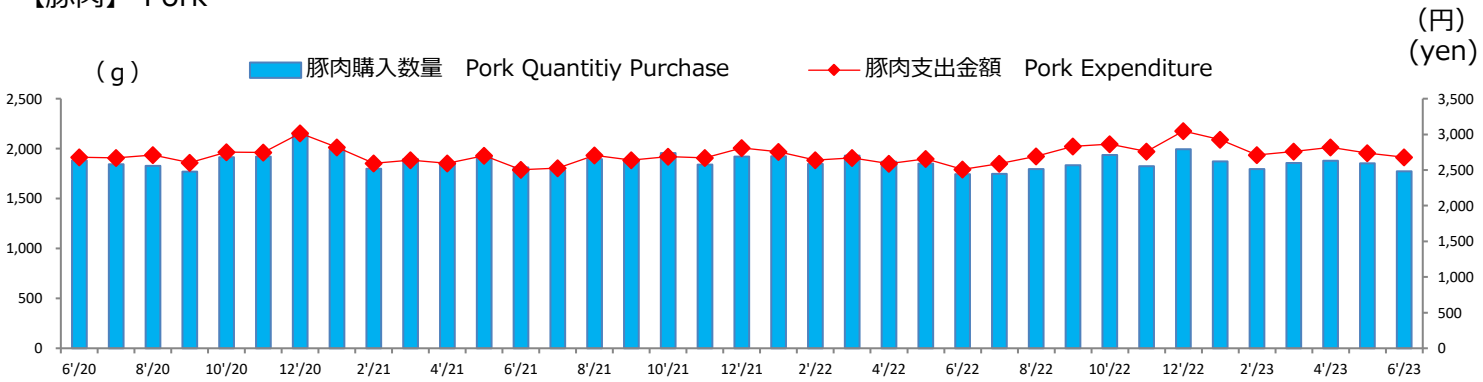
グラフ資料出所：総務省「家計調査」
Source: Ministry of Internal Affairs and Communications "Family Income and Expenditure Survey"
二人以上の世帯（農林漁家世帯を除く）
Two-or-more-person Households (Not including agricultural, forestry and fisheries households)

【牛肉】 Beef



	前期差 Comparison with The previous year	前月差 Comparison with The previous month
購入数量(g) Quantity Purchase(g)	14	-39
支出金額(円) Expenditure (yen)	-56	-246

【豚肉】 Pork



	前期差 Comparison with The previous year	前月差 Comparison with The previous month
購入数量(g) Quantity Purchase(g)	29	-78
支出金額(円) Expenditure (yen)	170	-59

【鶏肉】 Chicken

	前期差 Comparison with The previous year	前月差 Comparison with The previous month
購入数量(g) Quantity Purchase(g)	22	-30
支出金額(円) Expenditure (yen)	117	-38

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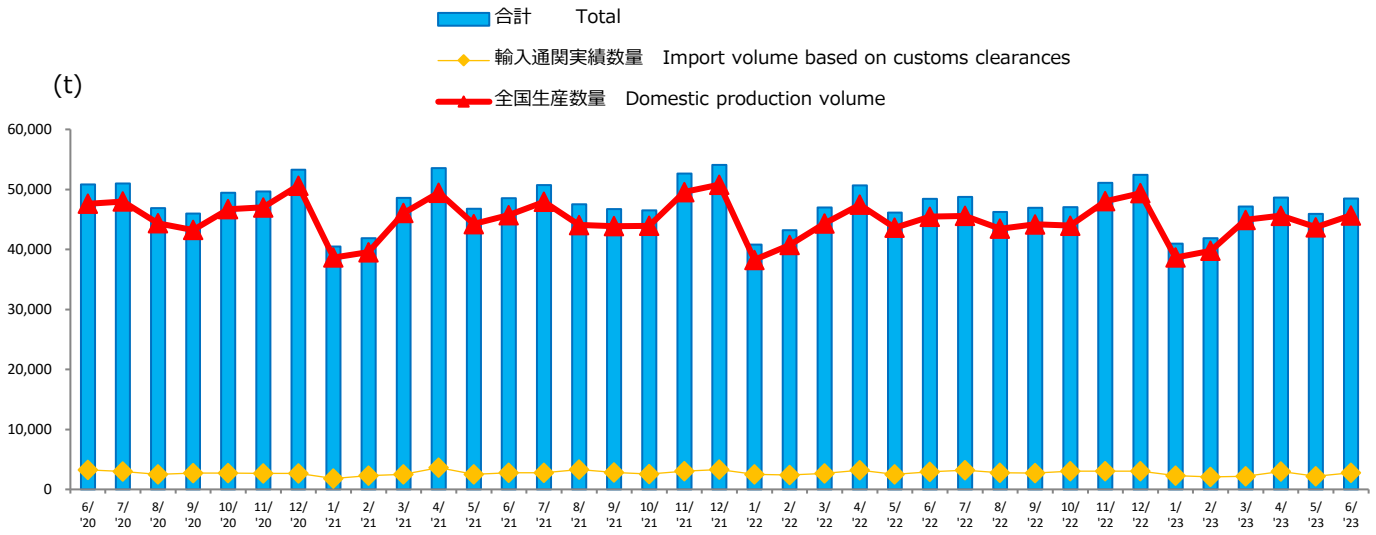
ハム・ソーセージ需給量推移 / Supply and Demand Trends in Hams and Sausages

【ハム・ソーセージ全国生産数量・輸入通関実績数量】
Production and Import Volume Based on Customs Clearances for Hams and Sausages

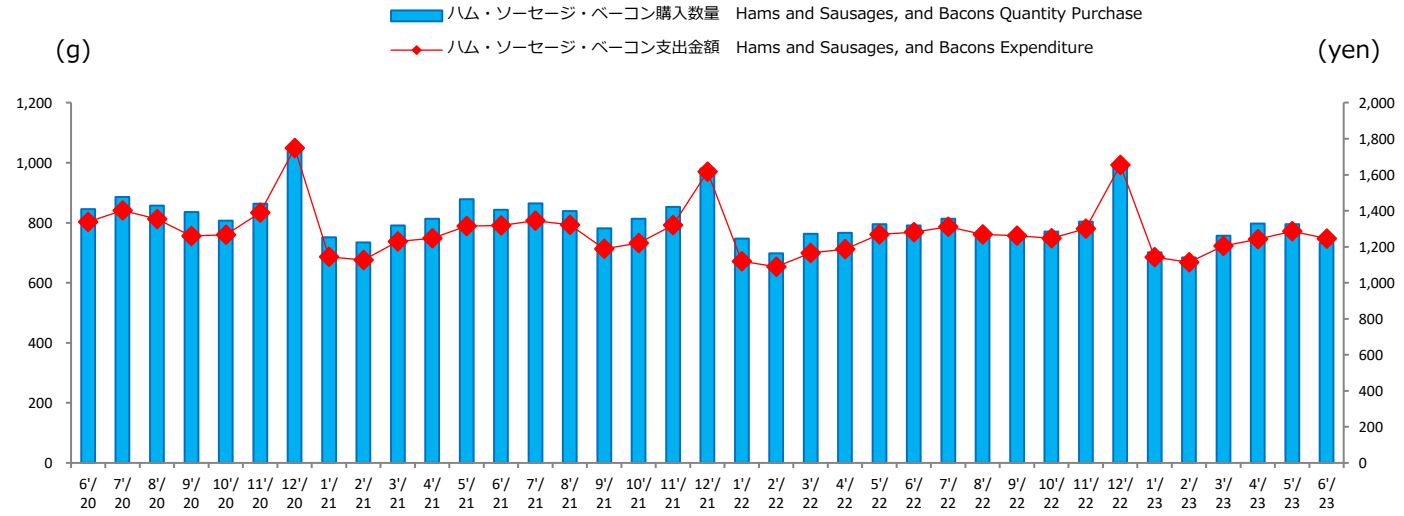


(t)

	前期差 Comparison with the previous year	前月差 Comparison with the previous month
輸入量 Imports	-178	579
生産数量 Production	224	1,980

グラフ資料出所：日本食肉加工協会
Source: Japan Meat Processor Association

【家計調査　ハム・ソーセージ・ベーコン購入数量／支出金額】
Family Income and Expenditure Survey for Hams and Sausages, and Bacons



	前期差 Comparison with The previous year	前月差 Comparison with The previous month
購入数量(g) Quantity Purchase(g)	-59	-63
支出金額(円) Expenditure (yen)	-36	-41

グラフ資料出所：総務省「家計調査」
Source: Ministry of Internal Affairs and Communications "Family Income and Expenditure Survey"
二人以上の世帯（農林漁家世帯を除く）
Two-or-more-person Households (Not including agricultural, forestry and fisheries households)

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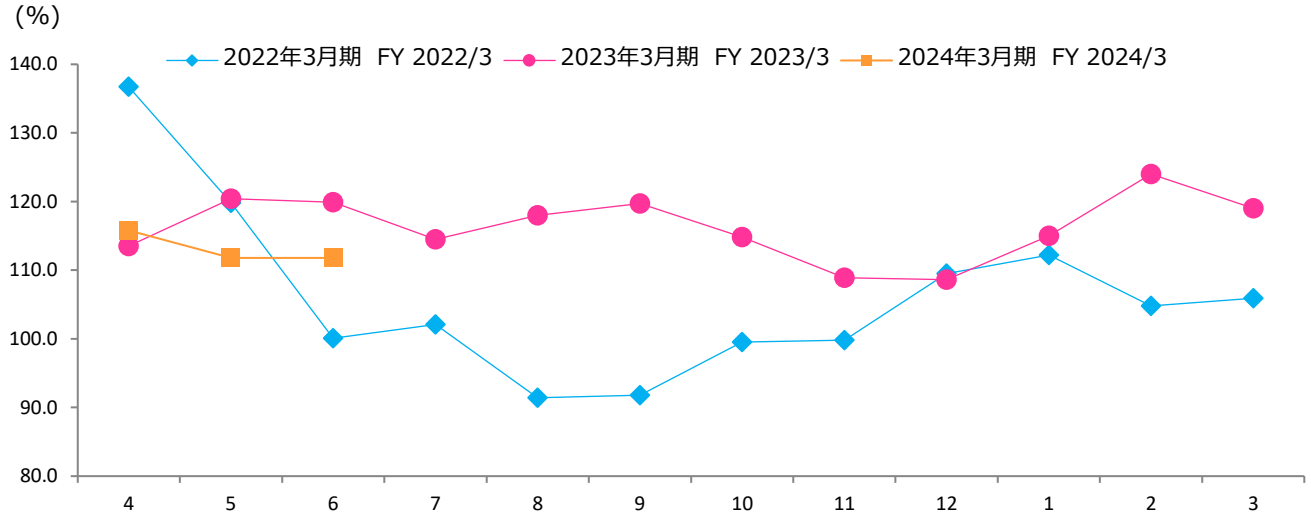
外食・量販店売上高推移 / Sales Trends in restaurants and volume retailers

【外食売上高前年同月比】
Year on year comparisons of monthly restaurant sales



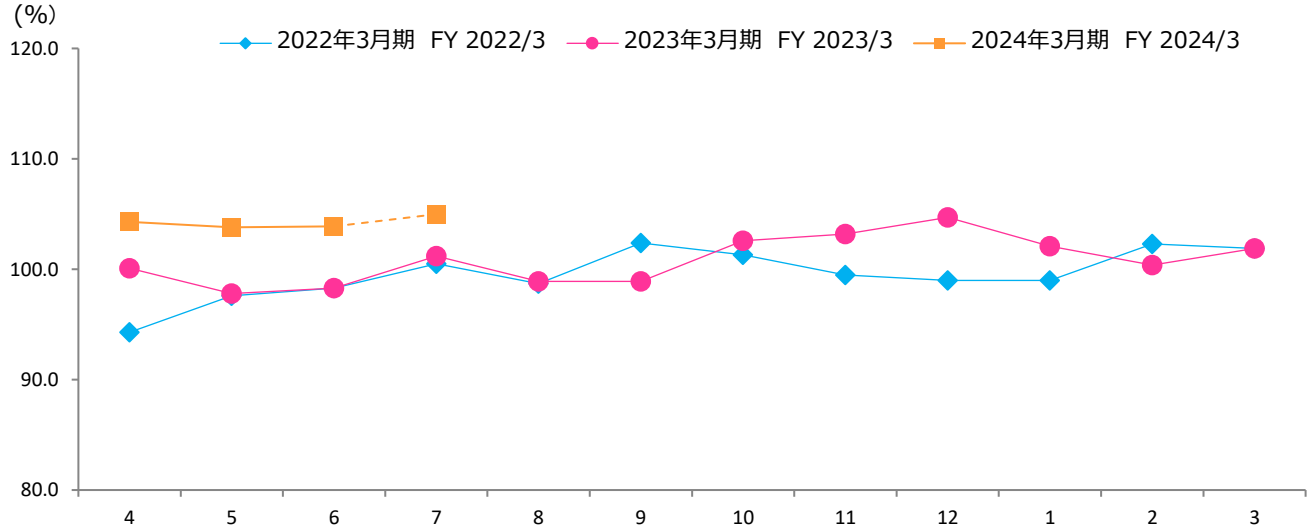
(%)

前期差 Comparison with the previous year	前月差 Comparison with The previous month
-8.1	0.0

グラフ資料出所：一般社団法人日本フードサービス協会
Source: Japan Foodservice Association

【量販店売上高前年同月比】
Year on year comparisons of monthly volume retailer sales

※破線は暫定値
The dashed line is provisional.



(%)

前期差 Comparison with the previous year	前月差 Comparison with The previous month
5.6	0.1

グラフ資料出所：流通三団体 スーパーマーケット販売統計調査
Source: Three volume retailer associations, sales statistics survey of volume retailers

○牛肉相場/Beef Prices（P.3-5）

去勢和牛　A-3　（東京市場、税込、円/KG）/Tokyo Market A-3 Wagyu Steer Prices, Tax Included

出所：東京食肉市場株式会社/Data Source：Tokyo Meat Market Co.Ltd　(yen/kg)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	2,505	2,220	2,153	2,120	1,993	2,068	2,143	2,249	2,375	2,151	2,058	2,199	2,186
FY2023/3	2,278	2,153	2,184	2,187	2,004	2,045	2,134	2,174	2,076	2,105	1,961	2,000	2,108
FY2024/3	2,124	2,028	1,964	1,935	*1,820								2,013

豪州チルドビーフ　ショートグレインフルセット（円/KG）/Australian Chilled Beef [Full Set (Short Grain Fed)] Prices

出所：農畜産業振興機構(全て単純平均単価)/Data Source：Agriculture & Livestock Industries Corporation　(all graphs based o　(yen/kg)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	1,270	1,270	1,285	1,285	1,242	1,216	1,236	1,342	1,404	1,469	1,475	1,519	1,334
FY2023/3	1,599	1,590	1,568	1,550	1,502	1,468	1,493	1,565	1,628	1,620	1,604	1,578	1,564
FY2024/3	1,569	1,554	1,508	1,469	*1,398								1,525

米国産 牛肉カットアウトバリュー 枝肉ベース　（ドル/100ポンド）/U.S. Beef　Boxed cutout, Choice 1-3, 600-900 lbs

出所：米国食肉輸出連合会/Source：U.S. Meat Export Federation　(US$/cwt)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	271.7	317.6	329.7	273.4	321.7	314.8	286.0	283.5	265.8	282.5	272.8	257.0	289.7
FY2023/3	268.4	260.1	268.2	267.9	264.9	254.1	251.6	259.6	260.4	277.0	274.0	284.2	265.9
FY2024/3	300.5	304.3	327.3										310.7

豪州　若齢牛価格　（生産者販売価格、豪セント/KG）/Eastern Young Cattle Indicator (EYCI)

出所：豪州食肉家畜生産者事業団/Source:Meat & Livestock Australia Ltd　(A¢/kg)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	893.6	892.1	914.1	975.8	1,006.2	1,022.6	1,054.6	1,085.1	1,131.7	1,157.9	1,124.4	1,113.5	1,031.0
FY2023/3	1,086.8	1,101.7	1,086.0	962.9	980.2	1,052.3	1,068.9	981.3	880.0	780.3	746.0	686.2	951.0
FY2024/3	686.1	616.4	567.0	566.8	*548.28								609.1

ウルグアイ 牛生体価格 生体ベース　（USドル/kg）/Uruguay Cattle Prices, ＞380kg

出所：Instituto Nacional de Carnes　(US$/kg)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	3.622	3.931	4.056	4.214	4.420	4.477	4.665	4.409	4.368	4.514	4.903	5.116	4.4
FY2023/3	5.382	5.501	5.520	5.424	5.355	4.962	4.124	3.984	3.768	3.702	3.890	4.180	4.6
FY2024/3	4.377	4.351	4.159	3.941	*3.958								4.2

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○豚肉相場/Pork Prices(

豚肉枝肉卸売価格　上物　東京市場平均価格、税込(円/KG)/Pork Carcass Prices (Tokyo Market Excellent grade, monthly average, Tax Included)

出所：東京食肉市場株式会社/Data Source:Tokyo Meat Market Co.Ltd　(yen/kg)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	493	506	620	635	622	600	527	493	579	505	511	507	550
FY2023/3	513	638	662	671	647	644	619	567	567	530	588	574	602
FY2024/3	562	645	700	681	*695								647

USウデ(ピクニック)　(US$/ポンド)/U.S.　Pork (Picnic) Prices

出所：米国食肉輸出連合会(USMEF)/Data Source：U.S. Meat Export Federation(USMEF)　(US$/lb)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	68.1	79.8	85.4	84.3	92.3	80.0	73.0	71.9	71.1	63.7	63.7	60.7	74.5
FY2023/3	68.5	71.3	75.6	85.2	91.5	84.3	89.6	89.0	89.1	72.1	66.9	75.4	79.9
FY2024/3	71.5	69.8	79.3	89.5									77.5

米国産 豚肉カットアウトバリュー 枝肉ベース　(ドル/100ポンド)/U.S. Pork　Cutout composite carcass, 53-54% lean

出所：米国食肉輸出連合会/Source：U.S. Meat Export Federation　(US$/cwt)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	111.2	117.5	123.3	119.8	119.4	108.0	102.6	91.0	86.6	90.6	105.6	105.7	106.8
FY2023/3	106.6	104.4	109.5	120.6	117.0	102.9	101.2	93.4	87.2	81.0	82.3	83.7	99.2
FY2024/3	78.0	82.6	92.7										84.4

米国　肥育豚価格　(生産者販売価格、セント/ポンド)/Live U.S. Fattening Pig Prices (Pig sales price)

出所：農畜産業振興機構(全て単純平均単価)/Source:Agriculture & Livestock Industries Corporation　(all graphs based on average p　(US ¢ /lb)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	75.6	81.0	86.2	81.0	78.6	68.8	62.8	54.5	51.8	56.0	67.0	73.6	46.5
FY2023/3	73.5	74.1	79.2	84.0	85.6	71.0	67.8	63.7	59.0	53.8	54.3	56.4	69.7
FY2024/3	51.7	55.4	63.1										56.7

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○鶏肉相場/Chicken Prices（P.10-11）

国産鶏肉卸売価格（モモ肉、税抜、円/KG）/Broiler Price (Tokyo market) Leg Wholesale Prices

出所：ALIC（農林水産省「食鳥市況情報」）、食品産業新聞社畜産日報掲載分から単純平均単価

Data Source：ALIC (MAFF "Survey of Broiler Wholesale price")

"DAILY MEAT ＆LIVESTOCK" which is a trade business paper published in Japan(all graphs based on average price)

(yen/kg)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	692	670	643	613	588	585	607	627	649	661	657	642	636
FY2023/3	633	636	635	646	659	676	708	740	781	818	815	813	713
FY2024/3	808	793	761	725	*702								772

国産鶏肉卸売価格（ムネ肉、税抜、円/KG）/Broiler Price (Tokyo market) Breast Wholesale Prices

出所：ALIC（農林水産省「食鳥市況情報」）、食品産業新聞社畜産日報掲載分から単純平均単価

Data Source：ALIC (MAFF "Survey of Broiler Wholesale price")

(yen/kg)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	314	312	308	312	319	330	338	340	344	339	328	321	325
FY2023/3	320	326	331	346	360	370	382	403	421	428	421	418	377
FY2024/3	419	418	417	411	*403								416

ブラジル　もも肉価格（円/KG）/Brazilian Chicken Thigh Prices

出所：食品産業新聞社畜産日報掲載分から単純平均単価

Data Source："DAILY MEAT ＆LIVESTOCK" which is a trade business paper published in Japan(all graphs based on average price)

(yen/kg)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	265	266	270	270	287	320	375	365	345	330	313	355	313
FY2023/3	441	475	478	480	480	480	480	453	403	390	390	400	446
FY2024/3	415	415	415	444	*490								422

米国　もも肉価格（セント/ポンド）/U.S. Chicken Thigh Prices

出所：農畜産業振興機構

Data Source：Agriculture & Livestock Industries Corporation (US ¢/lb)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3													#DIV/0!
FY2023/3	56.6	67.9	86.4	82.8	78.0	60.6	43.6	44.0	40.6	34.9	46.3	64.0	58.8
FY2024/3	66.6	71.0	69.1										68.9

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○飼料価格相場/Market Trends in Grain Feed Prices(P.14)

とうもろこしの輸入価格(円／トン)/Imported Corn Prices

出所：農畜産業振興機構(全て単純平均単価)/Source：Agriculture & Livestock Industries Corporation (all graphs based on average pri(yen/t)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	32,713	33,169	34,653	37,504	38,297	37,959	36,389	36,603	36,477	38,060	39,698	41,069	36,883
FY2023/3	44,770	49,888	52,330	56,414	56,519	56,763	54,931	53,401	49,825	47,934	47,111	47,357	51,437
FY2024/3	46,636	47,332	48,019										47,329

配合飼料の価格動向(円／トン)/Mixed Feed Prices

出所：農畜産業振興機構(全て単純平均単価)/Source：Agriculture & Livestock Industries Corporation (all graphs based on average pri(yen/t)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY2022/3	69,549	69,655	69,591	74,279	74,220	74,248	73,165	73,144	73,026	75,801	75,748	75,638	73,172
FY2023/3	80,517	80,635	80,481	91,215	91,078	91,170	91,996	91,939	91,770	91,209	91,111	91,054	88,681
FY2024/3	90,070	90,145											90,108

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○牛肉需給動向/Beef(P.6)

出所:農畜産業振興機構
Source:Agriculture & Livestock Industries Corporation

Notes:1.Boneless cuts equivalent
2.Figures for stocks are estimated by ALIC

(t)

FY 2022/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	84,332	75,091	78,952	81,506	79,310	77,283	83,784	76,837	77,050	66,158	62,466	62,452	926,545
うち生産量/Production	29,036	25,458	26,733	29,501	25,549	26,717	28,581	34,186	31,355	25,756	24,692	28,536	335,555
うち輸入量/Imports	55,296	49,633	52,219	52,005	53,761	50,566	55,203	42,651	45,695	40,397	37,770	33,911	590,990
推定出回り量/Estimated Marketing Quantity	83,501	68,920	73,803	78,215	74,200	68,549	78,341	83,256	82,575	65,064	63,035	67,499	930,348
うち国産品/Domestic	28,098	24,842	25,734	28,482	24,732	25,371	27,617	33,832	31,068	25,593	23,353	28,829	328,161
うち輸入品/ Imported	55,403	44,079	48,069	49,734	49,469	43,178	50,723	49,424	51,507	39,466	39,661	38,670	602,187
推定期末在庫/Estimated Ending Stock	117,622	123,233	127,791	130,389	134,775	142,769	147,567	140,348	133,882	134,515	133,485	127,825	–
うち国産品/Domestic	12,798	12,855	13,263	13,590	13,684	14,290	14,608	14,162	13,508	13,210	14,071	13,170	–
うち輸入品/Imported	104,824	110,378	114,528	116,799	121,091	128,479	132,959	126,186	120,374	121,305	119,414	114,655	–

FY 2023/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	91,287	72,505	85,341	82,070	80,031	80,017	77,495	74,940	69,183	66,600	64,492	66,267	905,221
うち生産量/Production	29,736	26,724	27,668	30,071	26,525	28,105	28,886	35,527	31,727	26,660	26,497	29,499	336,114
うち輸入量/Imports	61,521	45,754	57,663	51,999	53,506	51,912	48,609	39,413	37,456	39,915	37,987	36,768	569,107
推定出回り量/Estimated Marketing Quantity	92,545	67,139	73,247	73,243	70,089	73,360	77,536	76,486	75,452	66,481	64,139	70,713	886,984
うち国産品/Domestic	30,582	25,485	26,872	28,991	25,876	27,014	28,572	35,236	30,858	26,963	25,467	28,484	327,601
うち輸入品/ Imported	61,963	41,654	46,376	44,252	44,213	46,346	48,964	41,250	44,594	39,518	38,671	42,229	559,383
推定期末在庫/Estimated Ending Stock	126,013	130,844	142,418	150,599	159,883	165,839	164,947	162,713	155,566	155,229	154,934	149,724	–
うち国産品/Domestic	11,800	12,531	12,818	13,252	13,243	13,633	13,096	12,699	12,690	11,956	12,345	12,596	–
うち輸入品/Imported	114,213	118,313	129,600	137,347	146,640	152,206	151,851	150,014	142,876	143,273	142,589	137,128	–

FY 2024/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	98,224	73,754	72,083										244,061
うち生産量/Production	30,303	27,295	28,420										86,018
うち輸入量/Imports	67,921	46,459	43,663										158,043
推定出回り量/Estimated Marketing Quantity	87,054	72,778	71,724										231,555
うち国産品/Domestic	29,790	26,851	27,808										84,449
うち輸入品/ Imported	57,265	45,926	43,915										147,106
推定期末在庫/Estimated Ending Stock	160,155	160,569	160,308										–
うち国産品/Domestic	12,371	12,252	12,243										–
うち輸入品/Imported	147,784	148,317	148,065										–

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○豚肉需給動向/Pork（P.9）

出所：農畜産業振興機構
Source：Agriculture & Livestock Industries Corporation

Notes:1.Boneless cuts equivalent
2.Figures for stocks are estimated by ALIC

(t)

FY 2022/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	178,773	144,066	149,199	146,026	149,408	149,393	154,848	160,766	156,609	162,079	145,516	154,977	1,800,639
うち生産量/Production	80,131	72,872	73,971	71,419	71,268	75,182	76,972	82,305	82,143	79,557	73,690	83,122	916,655
うち輸入量/Imports	98,642	71,194	75,228	74,607	78,140	74,211	77,876	78,461	74,466	82,518	71,813	71,838	883,984
推定出回り量/Estimated Marketing Quantity	176,016	143,136	146,806	149,081	145,399	150,310	159,236	167,066	164,218	153,283	143,488	153,969	1,827,335
うち国産品/Domestic	78,537	72,522	74,393	72,678	72,189	76,016	77,317	81,908	80,677	79,133	73,660	82,184	916,156
うち輸入品/ Imported	97,479	70,614	72,412	76,403	73,210	74,293	81,919	85,158	83,541	74,148	69,824	71,779	911,179
推定期末在庫/Estimated Ending Stock	184,636	185,475	187,729	184,569	188,461	187,419	182,807	176,355	168,588	177,272	179,196	180,095	–
うち国産品/Domestic	25,593	25,852	25,290	23,926	22,888	21,928	21,359	21,604	22,912	23,226	23,161	24,001	–
うち輸入品/Imported	159,043	159,623	162,439	160,643	165,573	165,491	161,448	154,751	145,676	154,046	156,035	156,094	–

FY 2023/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	185,042	149,851	162,494	150,459	157,070	145,198	151,302	169,005	148,487	152,168	144,149	150,613	1,851,660
うち生産量/Production	76,211	72,518	73,193	67,437	70,557	72,670	75,549	81,110	79,677	77,322	72,894	81,586	922,666
うち輸入量/Imports	108,816	77,418	89,288	83,013	86,492	72,520	75,744	87,886	68,853	74,837	71,250	69,027	928,994
推定出回り量/Estimated Marketing Quantity	172,770	142,616	148,323	142,464	149,932	149,543	159,243	170,356	157,452	150,132	142,215	149,688	1,852,008
うち国産品/Domestic	77,826	72,177	74,353	67,225	71,355	73,528	75,135	81,919	78,456	78,548	71,420	81,112	921,228
うち輸入品/ Imported	94,930	70,439	73,970	75,239	78,577	76,014	84,109	88,437	78,996	71,584	70,795	68,576	930,780
推定期末在庫/Estimated Ending Stock	192,212	199,401	213,430	221,300	228,331	223,843	215,805	214,307	205,229	207,204	209,026	209,804	–
うち国産品/Domestic	22,232	22,442	21,153	21,249	20,365	19,371	19,698	18,751	19,816	18,538	19,905	20,232	–
うち輸入品/Imported	169,980	176,959	192,277	200,051	207,966	204,472	196,107	195,556	185,413	188,666	189,121	189,572	–

FY 2024/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	183,364	165,842	154,797										504,003
うち生産量/Production	73,794	76,116	73,486										223,396
うち輸入量/Imports	109,570	89,729	81,311										280,610
推定出回り量/Estimated Marketing Quantity	168,408	146,241	153,933										468,582
うち国産品/Domestic	73,311	76,372	73,928										223,611
うち輸入品/ Imported	95,097	69,872	80,005										244,974
推定期末在庫/Estimated Ending Stock	224,618	244,095	244,794										–
うち国産品/Domestic	20,573	20,193	19,586										–
うち輸入品/Imported	204,045	223,902	225,208										–

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○鶏肉需給動向（P.12）

出所：農畜産業振興機構
注：数量は骨付き肉ベース。成鶏肉を含む。輸入量には鶏肉以外の家禽肉を含まない。
Source：Agriculture & Livestock Industries Corporation

Notes:1.Bone in cuts equivalent
2.Figures for stocks are estimated by ALIC
3.The production quantity and the estimate

(t)

FY 2022/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	191,394	185,055	181,906	183,094	179,022	183,015	198,030	205,802	217,595	190,949	63,107	188,613	2,201,457
うち生産量/Production	139,841	137,646	138,019	137,138	130,939	136,605	145,516	146,726	156,924	137,492	135,670	143,927	1,648,625
うち輸入量/Imports	50,157	46,229	42,812	44,750	46,934	45,194	51,212	57,772	60,671	53,783	49,572	45,135	552,832
推定出回り量/Estimated Marketing Quantity	193,784	184,300	188,225	190,672	180,986	187,964	196,510	200,452	215,921	182,547	180,055	194,582	2,208,102
うち国産品/Domestic	136,965	136,543	136,659	136,718	130,612	137,698	144,620	147,839	154,999	137,881	136,861	145,335	1,650,966
うち輸入品/ Imported	55,423	46,577	50,491	52,748	49,225	49,050	50,588	51,309	60,922	44,992	43,511	49,247	557,136
推定期末在庫/Estimated Ending Stock	161,412	162,167	155,848	148,270	146,306	141,357	142,877	148,227	149,901	158,303	163,173	157,653	–
うち国産品/Domestic	31,656	32,759	34,119	34,539	34,866	33,773	34,669	33,556	35,481	35,092	33,901	32,493	–
うち輸入品/Imported	129,756	129,408	121,729	113,731	111,440	107,584	108,208	114,671	114,420	123,211	129,272	125,160	–

FY 2023/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	184,639	181,225	192,387	178,808	180,709	182,391	198,858	194,172	197,672	181,540	180,765	190,589	2,279,572
うち生産量/Production	141,380	139,096	140,591	133,177	133,324	135,582	144,955	144,433	153,304	137,186	133,697	143,098	1,685,351
うち輸入量/Imports	43,566	42,483	52,176	45,620	47,374	46,792	53,930	49,783	44,279	44,361	47,115	47,545	594,221
推定出回り量/Estimated Marketing Quantity	194,953	182,363	190,061	178,354	180,995	185,035	193,226	193,623	202,071	180,349	177,741	189,833	2,285,721
うち国産品/Domestic	142,526	139,281	141,237	134,809	133,706	138,240	145,581	146,278	152,033	137,397	133,151	141,028	1,681,638
うち輸入品/ Imported	52,427	43,081	48,824	43,545	47,289	46,794	47,645	47,346	50,038	42,953	44,590	48,805	604,083
推定期末在庫/Estimated Ending Stock	147,646	146,863	149,569	150,012	149,715	147,061	152,720	153,312	148,824	150,021	153,092	153,902	–
うち国産品/Domestic	31,347	31,162	30,516	28,884	28,502	25,844	25,218	23,373	24,644	24,433	24,979	27,049	–
うち輸入品/Imported	116,299	115,701	119,053	121,128	121,213	121,217	127,502	129,939	124,180	125,588	128,113	126,853	–

FY 2024/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	186,930	194,387	199,264										580,557
うち生産量/Production	139,494	142,670	141,558										423,722
うち輸入量/Imports	47,412	51,717	57,706										156,835
推定出回り量/Estimated Marketing Quantity	193,758	184,592	193,898										572,248
うち国産品/Domestic	138,996	140,874	142,303										422,173
うち輸入品/ Imported	54,762	43,718	51,595										150,075
推定期末在庫/Estimated Ending Stock	147,050	156,845	162,211										–
うち国産品/Domestic	27,547	29,343	28,598										–
うち輸入品/Imported	119,503	127,502	133,613										–

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○ハムソーセージ需給動向/Hams and Sausages（P.16）

FY 2021/3 （t）

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
国内生産量/Production	49,465	44,238	45,733	47,941	44,057	43,883	43,942	49,557	50,791	38,269	40,750	44,348	542,974
輸入量/ Imports	3,648	2,529	2,797	2,778	3,315	2,850	2,560	3,077	3,316	2,532	2,437	2,661	34,500
合計/Supplied Quantity	53,113	46,767	48,531	50,719	47,530	46,733	46,503	52,643	54,107	40,801	43,187	47,009	577,474

FY 2022/3 （t）

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
国内生産量/Production	47,459	43,605	45,445	45,577	43,462	44,172	43,975	48,040	49,388	38,668	39,780	44,916	534,487
輸入量/ Imports	3,226	2,540	2,966	3,190	2,759	2,756	3,073	3,073	3,046	2,319	2,092	2,219	33,259
合計/Supplied Quantity	50,685	46,145	48,411	48,767	46,221	46,928	47,048	51,113	52,434	40,987	41,872	47,135	567,746

FY 2023/3 （t）

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
国内生産量/Production	45,615	43,689	45,669										134,973
輸入量/ Imports	3,021	2,209	2,788										8,018
合計/Supplied Quantity	48,636	45,898	48,457										142,991

○副原料相場/Auxiliary Materials（P.13）

天然腸（CIF、主に羊腸(豚腸・牛腸等も含む)、円/kg）/Natural Casing（CIF、Mainly seep casing including pork & beef casing）

出所：財務省貿易統計（金額÷数量で算出）/Source：Trade Statistics of Japan（Calculated by amount/quantity） (yen/kg)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY 2022/3	4,409	4,214	4,694	4,528	4,644	4,923	4,490	4,706	4,749	4,975	4,810	5,272	4,701
FY 2023/3	4,897	5,224	5,167	5,654	5,457	5,725	5,686	5,752	5,633	5,850	5,486	5,943	5,540
FY 2024/3	5,751	6,221	5,981										5,984

ナチュラルチーズ（CIF、円/kg）/Natural cheese(CIF)

出所：農畜産業振興機構(全て単純平均金単価)/Source：Agriculture & Livestock Industries Corporation （all graphs based on averag (yen/kg)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY 2022/3	472	477	485	482	485	498	484	521	522	535	526	551	503
FY 2023/3	566	622	626	662	680	718	757	821	791	787	778	805	718
FY 2024/3	772	791	777										780

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○「家計調査」購入数量/Family Income and Expenditure Survey:Quantity Purchase（P.15−16）

出所：総務省「家計調査」

Source:Ministry of Internal Affairs and Communications "Family Income and Expendicure Survey"

Two-ormore-person Households(Not including aguricultural,forestry and fisheries households)

(g)

2021	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ハム・ソーセージ・ベーコン購入数量/Hams and Sausages, and Bacons	751	734	791	813	878	843	865	839	781	813	853	981
牛肉購入数量/Beef	581	525	547	553	597	551	570	603	504	504	491	722
豚肉購入数量/Pork	1,989	1,800	1,894	1,859	1,923	1,810	1,782	1,896	1,889	1,955	1,841	1,921
鶏肉購入数量/Chicken	1,582	1,428	1,528	1,556	1,527	1,461	1,440	1,449	1,546	1,559	1,536	1,695

2022	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ハム・ソーセージ・ベーコン購入数量/Hams and Sausages, and Bacons	747	698	763	766	795	791	813	755	747	771	804	991
牛肉購入数量/Beef	544	459	532	494	553	465	504	508	532	533	456	652
豚肉購入数量/Pork	1,923	1,848	1,930	1,868	1,850	1,745	1,746	1,797	1,835	1,937	1,823	1,995
鶏肉購入数量/Chicken	1,563	1,483	1,550	1,512	1,476	1,433	1,439	1,372	1,492	1,574	1,495	1,729

2023	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ハム・ソーセージ・ベーコン購入数量/Hams and Sausages, and Bacons	701	684	757	797	795	732						
牛肉購入数量/Beef	491	442	466	485	518	479						
豚肉購入数量/Pork	1,872	1,795	1,857	1,879	1,852	1,774						
鶏肉購入数量/Chicken	1,491	1,402	1,497	1,572	1,485	1,455						

○「家計調査」支出金額/Family Income and Expenditure Survey:Expenditure（P.15−16）

出所：総務省「家計調査」

(yen)

2021	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ハム・ソーセージ・ベーコン支出金額/Hams and Sausages, and Bacons	1,144	1,126	1,229	1,248	1,314	1,318	1,345	1,322	1,189	1,220	1,320	1,617
牛肉 支出金額//Beef	1,920	1,670	1,845	1,759	2,096	1,765	1,813	2,113	1,811	1,760	1,675	2,983
豚肉 支出金額/Pork	2,817	2,594	2,641	2,594	2,701	2,506	2,527	2,705	2,639	2,690	2,670	2,808
鶏肉 支出金額/Chicken	1,469	1,359	1,406	1,384	1,426	1,328	1,265	1,341	1,383	1,424	1,429	1,702

2022	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ハム・ソーセージ・ベーコン支出金額/Hams and Sausages, and Bacons	1,120	1,089	1,166	1,186	1,268	1,281	1,311	1,268	1,261	1,247	1,301	1,654
牛肉 支出金額//Beef	1,781	1,571	1,739	1,654	1,904	1,643	1,789	1,958	1,985	1,779	1,731	3,084
豚肉 支出金額/Pork	2,755	2,640	2,672	2,590	2,657	2,511	2,590	2,691	2,832	2,864	2,760	3,047
鶏肉 支出金額/Chicken	1,450	1,404	1,439	1,368	1,403	1,375	1,345	1,309	1,463	1,534	1,505	1,854

2023	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ハム・ソーセージ・ベーコン支出金額/Hams and Sausages, and Bacons	1,143	1,114	1,204	1,241	1,286	1,245						
牛肉 支出金額//Beef	1,783	1,554	1,596	1,758	1,833	1,587						
豚肉 支出金額/Pork	2,925	2,712	2,762	2,817	2,740	2,681						
鶏肉 支出金額/Chicken	1,559	1,475	1,511	1,566	1,530	1,492						

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○外食・量販店売上高推移/ Sales Trends in restaurants and volume retailers（P.17）

外食売上高前年同月比 / Year on year comparisons of monthly restaurant sales

出所：一般社団法人日本フードサービス協会 / Source：Japan Foodservise Association (%)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY 2022/3	136.7	119.8	100.1	102.1	91.4	91.8	99.5	99.8	109.5	112.2	104.8	105.9	106.1
FY 2023/3	113.5	120.4	119.9	114.5	118.0	119.7	114.8	108.9	108.6	115.0	124.0	119.0	116.4
FY 2024/3	115.8	111.8	111.8										113.1

量販店売上高前年同月比/ Year on year comparisons of monthly volume retailer sales

出所：流通三団体 スーパーマーケット販売統計調査 / Source：Three Volume retail associations, sales statistics survey of volume retailers (%)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
FY 2022/3	94.3	97.6	98.3	100.5	98.7	102.4	101.3	99.5	99.0	99.0	102.3	101.9	99.6
FY 2023/3	100.1	97.8	98.3	101.2	98.9	98.9	102.6	103.2	104.7	102.1	100.4	101.9	100.8
FY 2024/3	104.3	103.8	103.9	*105.0									104.0

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