

2024年3月度 市場動向資料集

March 2024 Market Trends

日本八公株式会社
NH Foods Ltd.
April 25, 2024



Nipponham Group

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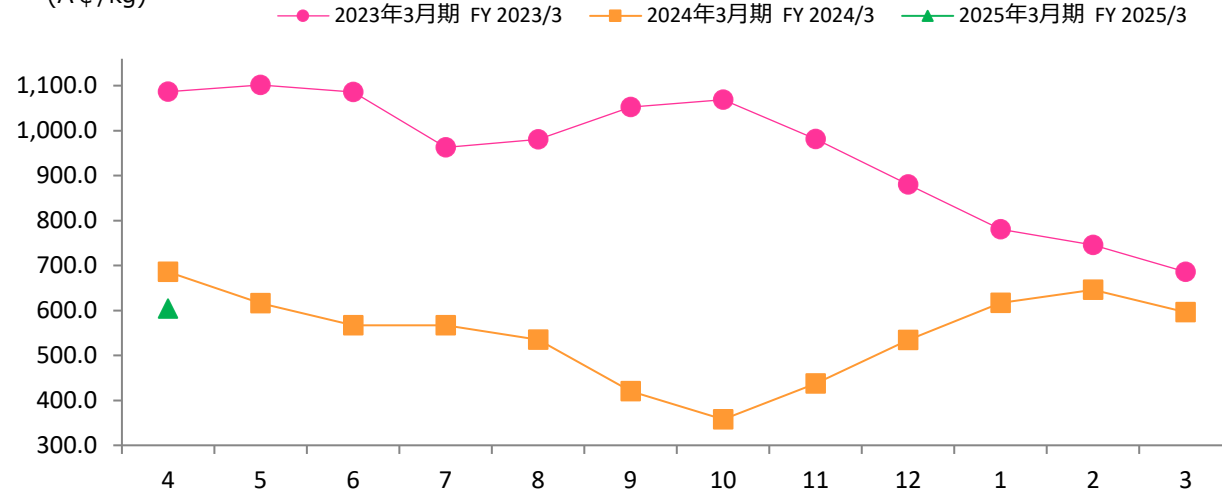
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【豪州産 若齢牛価格(生産者販売価格) (現地価格)】

Eastern Young Cattle Indicator (EYCI)

(豪セント/kg)
(A¢/kg)

※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 Year-on-year | 前月差 Month-on-month | -89.8 | -49.7 |

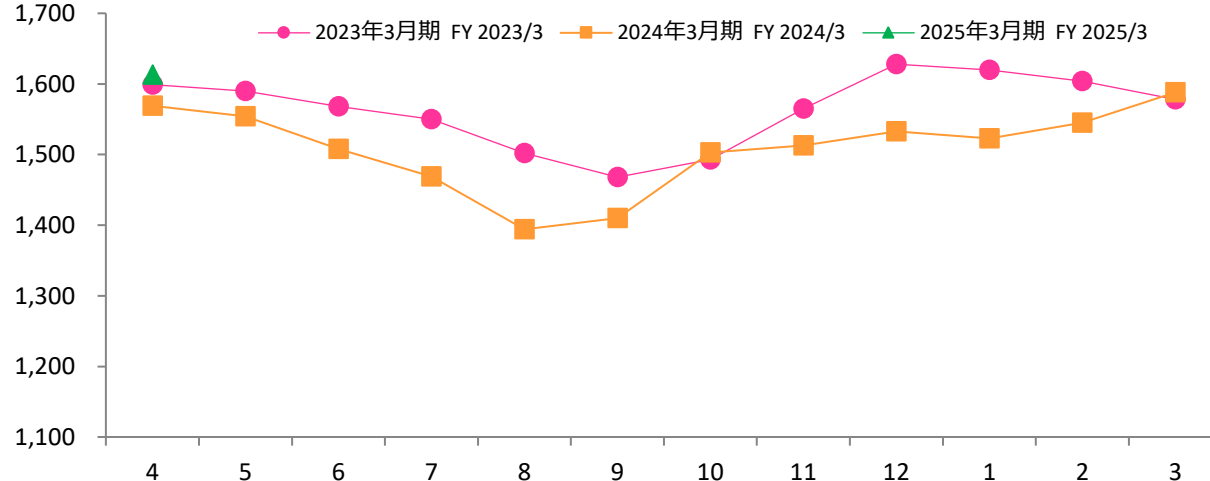
グラフ資料出所: 豪州食肉家畜生産者事業団
Source: MEAT & LIVESTOCK AUSTRALIA

【豪州産チルドビーフ ショートグレインフルセット価格 (日本国内価格)】

Australian Chilled Beef [Full Set (Short Grain Fed)] Prices

(¥/kg)

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

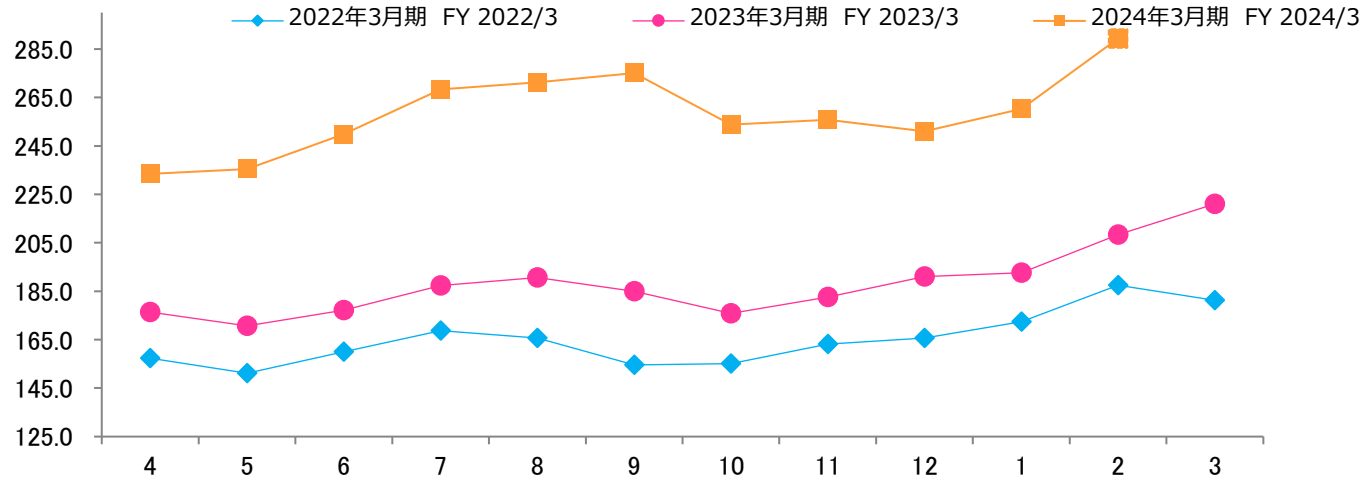


ショートグレイン: 穀物肥育期間 100日以上
Short Grain Fed: Grain Fed period 100 days or more
フルセット: セット販売(基本12部位) ⇔ パーツ販売
Full Set: Set Price of primal 12 items ⇔ Single item Sales

| | | (¥/kg) | |
|---------------------|-----------------------|--------|----|
| 前期差 Year-on-year | 前月差 Month-on-month | 10 | 43 |

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)

【米国産 肥育素牛(生産者販売価格) (現地価格)】
U.S. cattle prices, 600-650lb



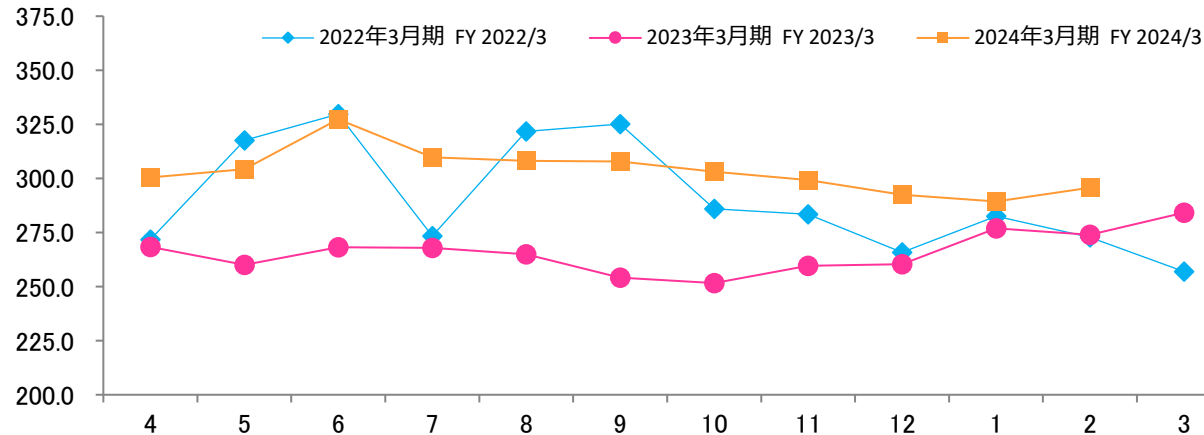
(US \$/cwt)

| 前期差 Year-on-year | 前月差 Month-on-month |
|---------------------|-----------------------|
| 80.9 | 29.0 |

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

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

(ドル/100ポンド)
(US \$/cwt)



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

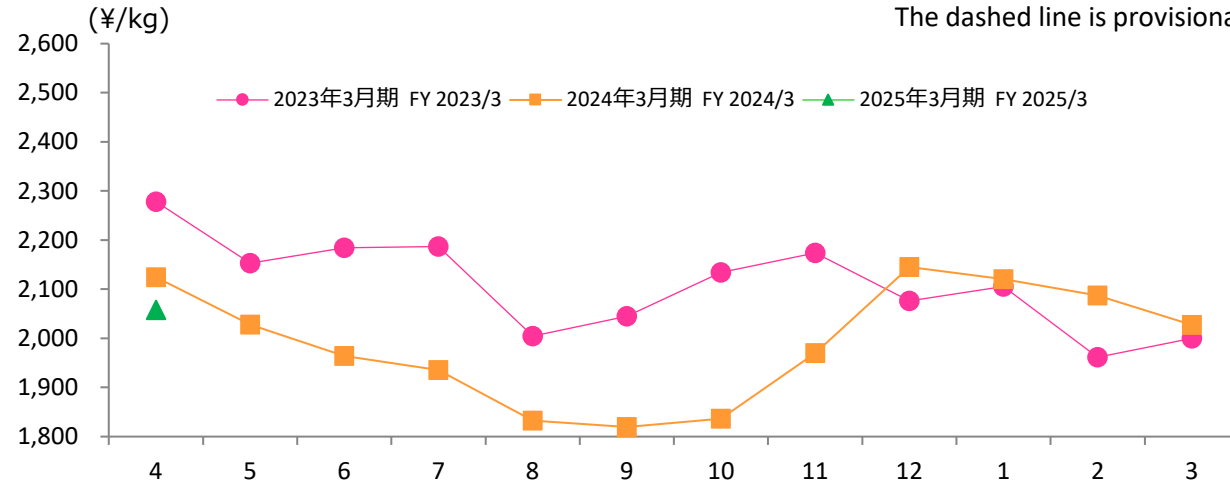
(ドル/100ポンド)
(US \$/cwt)

| 前期差 Year-on-year | 前月差 Month-on-month |
|---------------------|-----------------------|
| 21.7 | 6.3 |

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

【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.

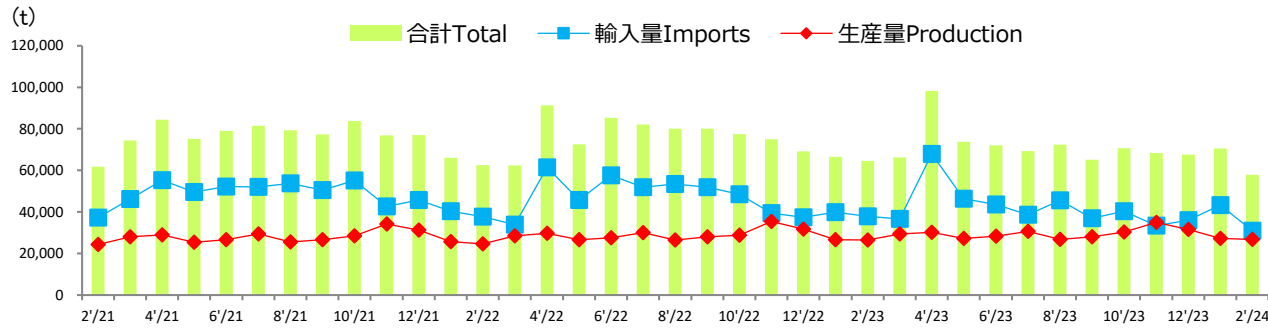


A-3 : 格付けランク、歩留まり等級A~C / 肉質等級1~5
Yield Grade A-C / Meat Quality Grade 1-5

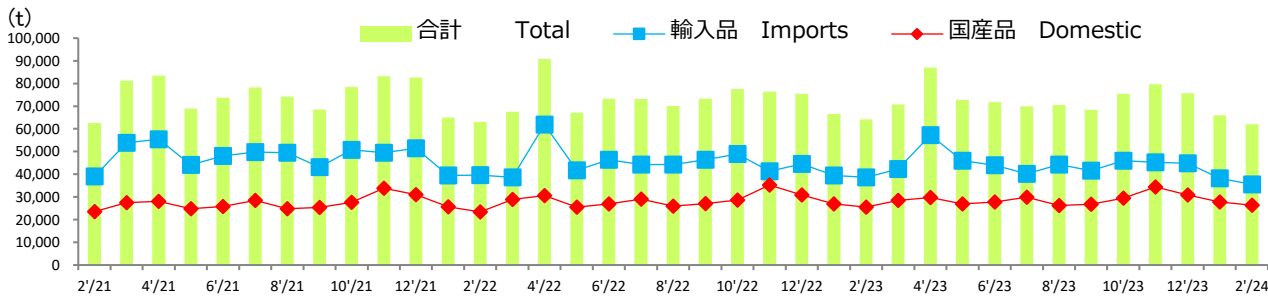
| (¥/kg) | |
|---------------------|-----------------------|
| 前期差 Year-on-year | 前月差 Month-on-month |
| 27 | -60 |

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

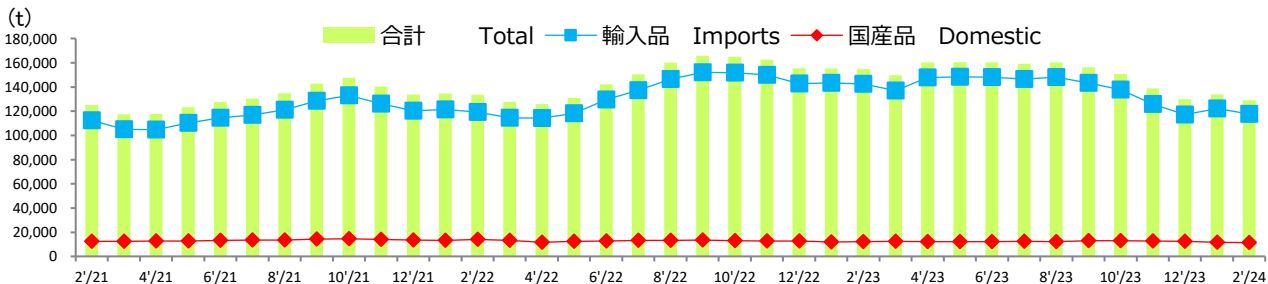
【生産量と輸入量】 Production and Imports



【推定出回り量】 Estimated Marketing Quantity



【推定期末在庫】 Estimated Ending Stock



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

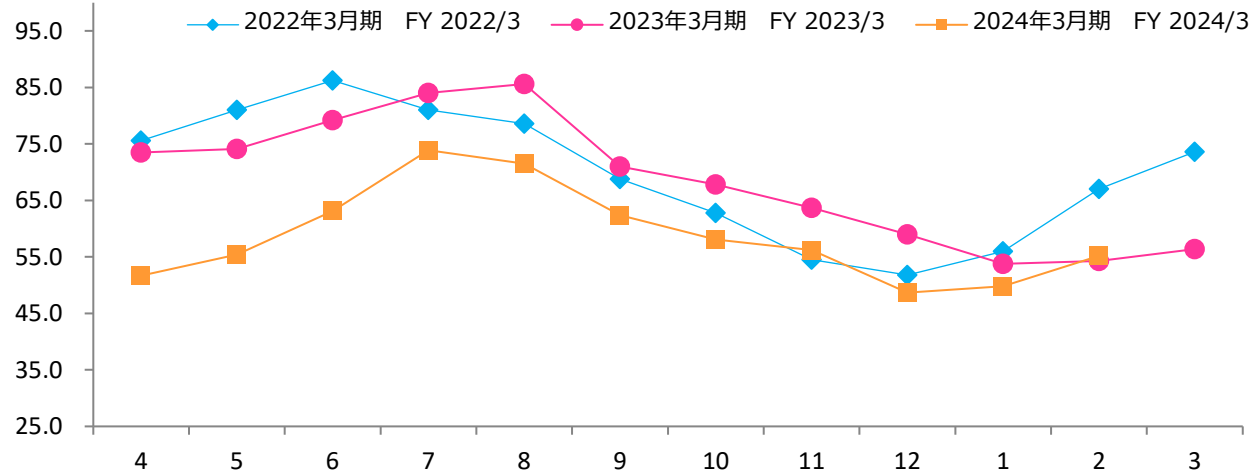
| | 前期差 Year-on-year | 前期比 Rate of change | 前月差 Month-on-Month | 前月比 Rate of change |
|-------------------|---------------------|-----------------------|-----------------------|-----------------------|
| 輸入量 Imports | -6,977 | 82% | -12,254 | 72% |
| 生産量 Production | 407 | 102% | -410 | 98% |

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 + Production + Imports - Exports - Estimated ending stock

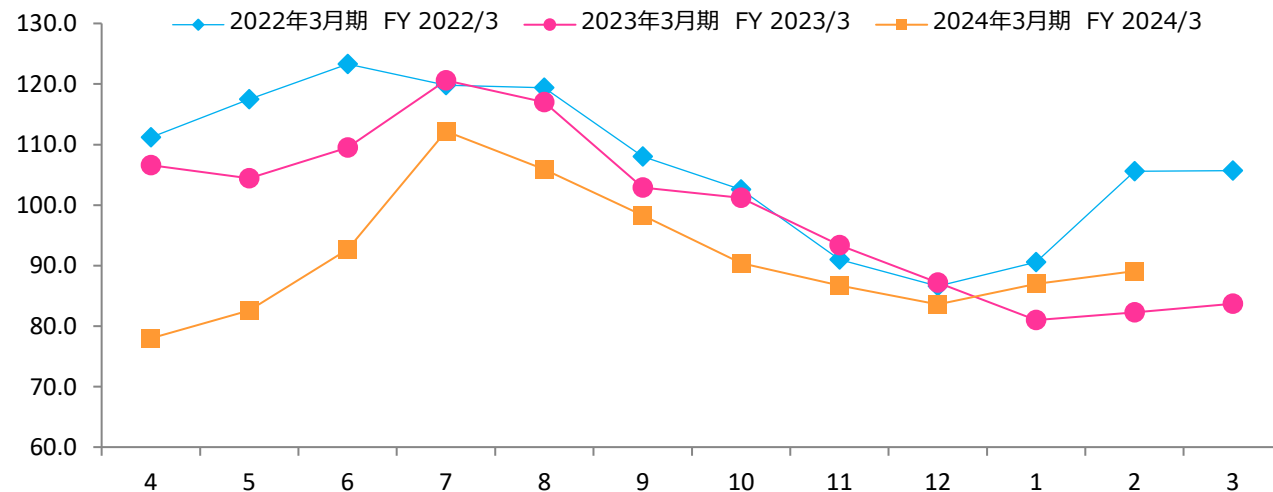
| | 前期差 Year-on-year | 前期比 Rate of change | 前月差 Month-on-Month | 前月比 Rate of change |
|-----------------|---------------------|-----------------------|-----------------------|-----------------------|
| 輸入量 Imports | -3,089 | 92% | -2,651 | 93% |
| 国産品 Domestic | 918 | 104% | -1,327 | 95% |

| | 前期差 Year-on-year | 前期比 Rate of change | 前月差 Month-on-Month | 前月比 Rate of change |
|-----------------|---------------------|-----------------------|-----------------------|-----------------------|
| 輸入量 Imports | -24,923 | 83% | -4,572 | 96% |
| 国産品 Domestic | -903 | 93% | -176 | 98% |

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



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



(セント/ポンド)
(US ¢/lb)

| 前期差 Year-on-year | 前月差 Month-on-Month |
|---------------------|-----------------------|
| 0.9 | 5.4 |

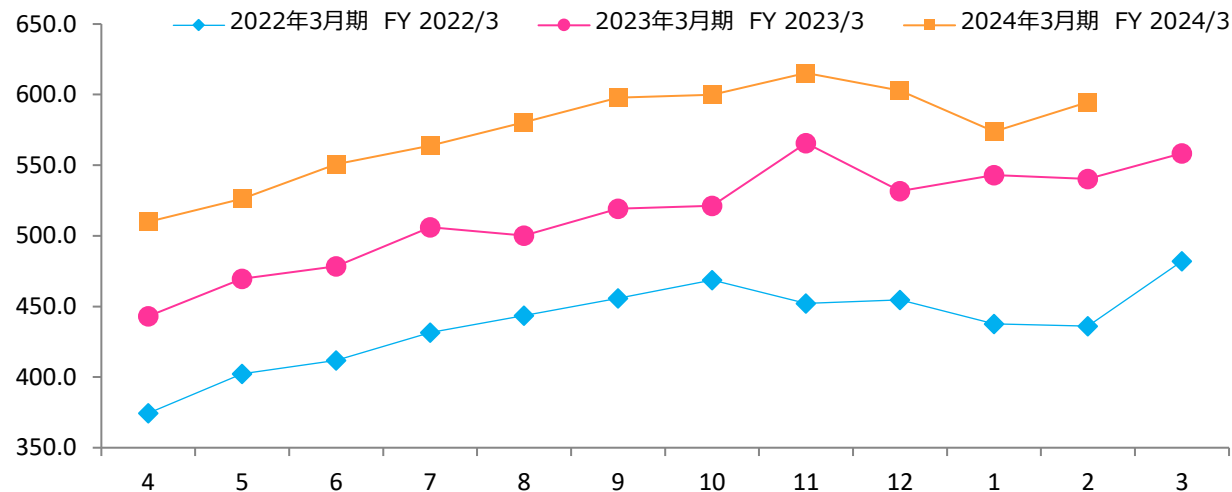
グラフ資料出所：農畜産業振興機構 (全て単純平均単価)
 Source: Agriculture & Livestock Industries Corporation (all graphs based on average prices)

(ドル/100ポンド)
(US \$/cwt)

| 前期差 Year-on-year | 前月差 Month-on-Month |
|---------------------|-----------------------|
| 6.8 | 2.1 |

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

【シーズンドポーク(GSP)輸入価格】
Seasoned Pork (GSP) Import Prices (CIF)
(US\$/cwt)

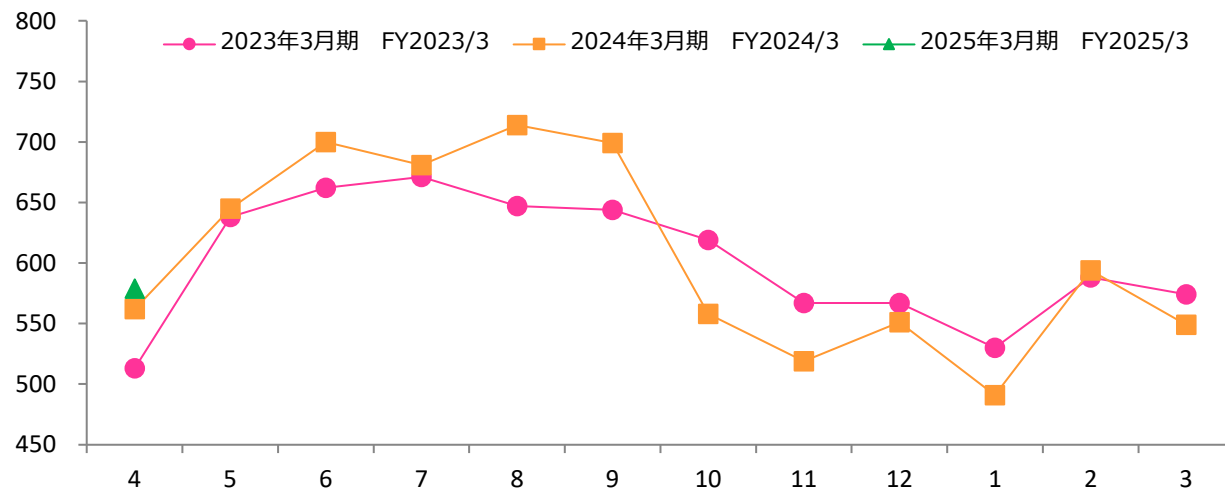


シーズンドポーク (豚肉調整品):主にソーセージ等の加工原料用
Mainly used for sausages

| (US\$/cwt) | |
|---------------------|-----------------------|
| 前期差 Year-on-year | 前月差 Month-on-month |
| 54.4 | 21.0 |

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)

【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.

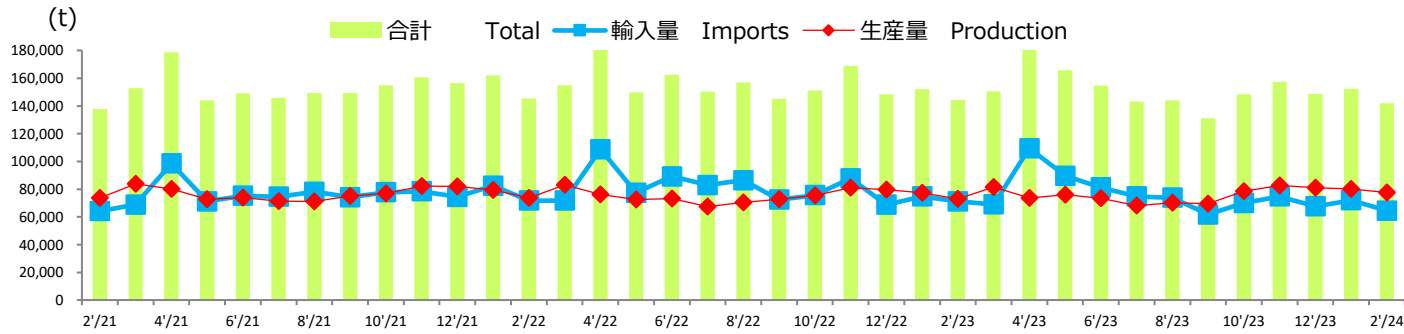
上物：等級(極上、上、中、並、等外)

| (¥/kg) | |
|---------------------|-----------------------|
| 前期差 Year-on-year | 前月差 Month-on-month |
| -25 | -45 |

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

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

【生産量と輸入量】
Production and Imports

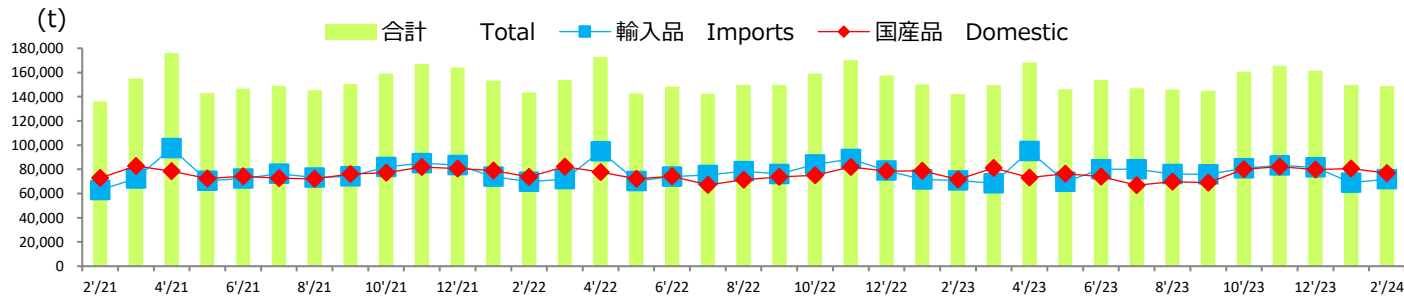


グラフ資料出所：農畜産業振興機構
Source: Agriculture & Livestock Industries Corporation

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

| | 前期差 Year-on-year | 前期比 Rate of change | 前月差 Month-on-Month | 前月比 Rate of change |
|-------------------|---------------------|-----------------------|-----------------------|-----------------------|
| 輸入量 Imports | -6,723 | 91% | -7,500 | 90% |
| 生産量 Production | 4,572 | 106% | -2,725 | 97% |

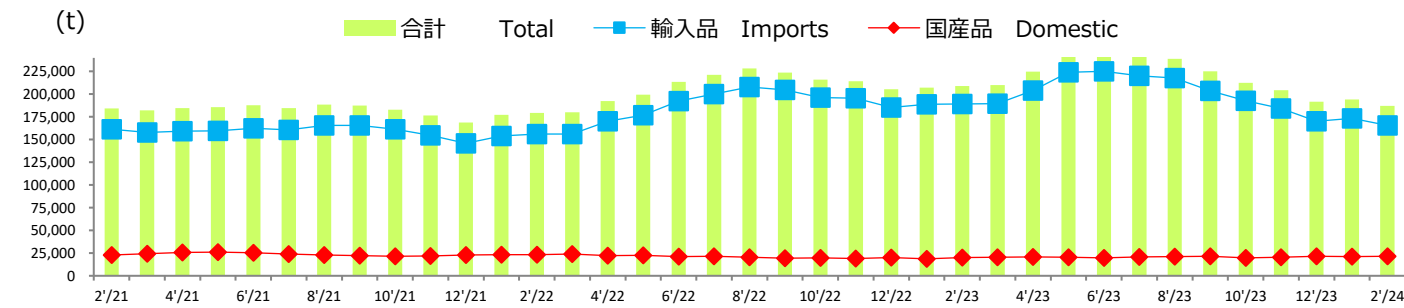
【推定出回り量】
Estimated Marketing Quantity



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

| | 前期差 Year-on-year | 前期比 Rate of change | 前月差 Month-on-Month | 前月比 Rate of change |
|-----------------|---------------------|-----------------------|-----------------------|-----------------------|
| 輸入量 Imports | 1,218 | 102% | 3,038 | 104% |
| 国産品 Domestic | 5,341 | 107% | -3,895 | -95% |

【推定期末在庫】
Estimated Ending Stock

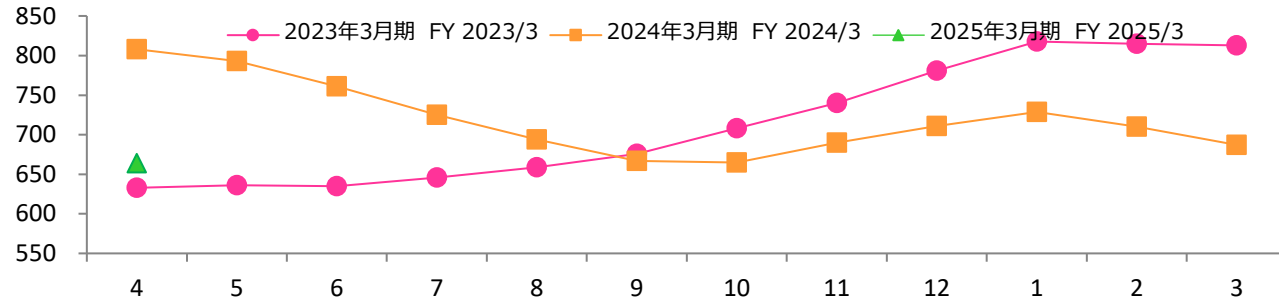


| | 前期差 Year-on-year | 前期比 Rate of change | 前月差 Month-on-Month | 前月比 Rate of change |
|-----------------|---------------------|-----------------------|-----------------------|-----------------------|
| 輸入量 Imports | -23,435 | 88% | -7,486 | 96% |
| 国産品 Domestic | 1,534 | 108% | 603 | 103% |

【国産鶏肉卸売価格（もも肉、税抜）】

Domestic Chicken Thigh Meat Wholesale Prices (¥/kg)

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

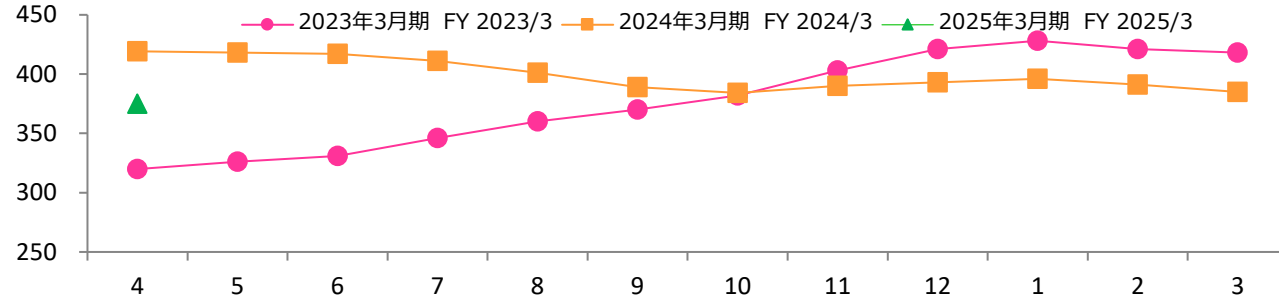


グラフ資料出所：ALIC (農林水産省「食鳥市況情報」)、食品産業新聞社畜産日報掲載分から単純平均単価
Date Source : ALIC (MAFF "Survey of Broiler Wholesale price")
DAILY MEAT & LIVESTOCK" which is a trade business paper published in Japan(all graphs based on Average Price)

| 前期差 Year-on-year | | 前月差 Month-on-month | |
|---------------------|--|-----------------------|--|
| -126 | | -23 | |

【国産鶏肉卸売価格（むね肉、税抜）】

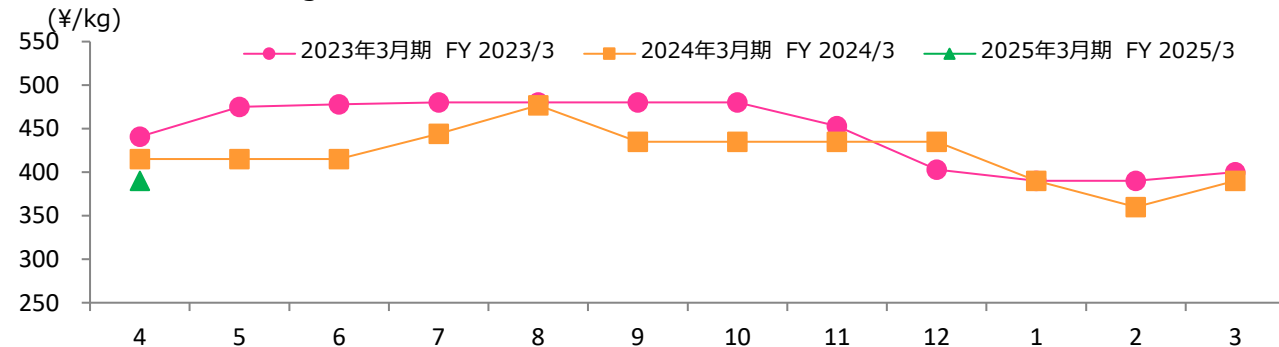
Domestic Chicken Breast Meat Wholesale Prices (¥/kg)



| 前期差 Year-on-year | | 前月差 Month-on-month | |
|---------------------|--|-----------------------|--|
| -33 | | -6 | |

【ブラジル産もも肉価格】

Brazilian Chicken Thigh Prices (¥/kg)



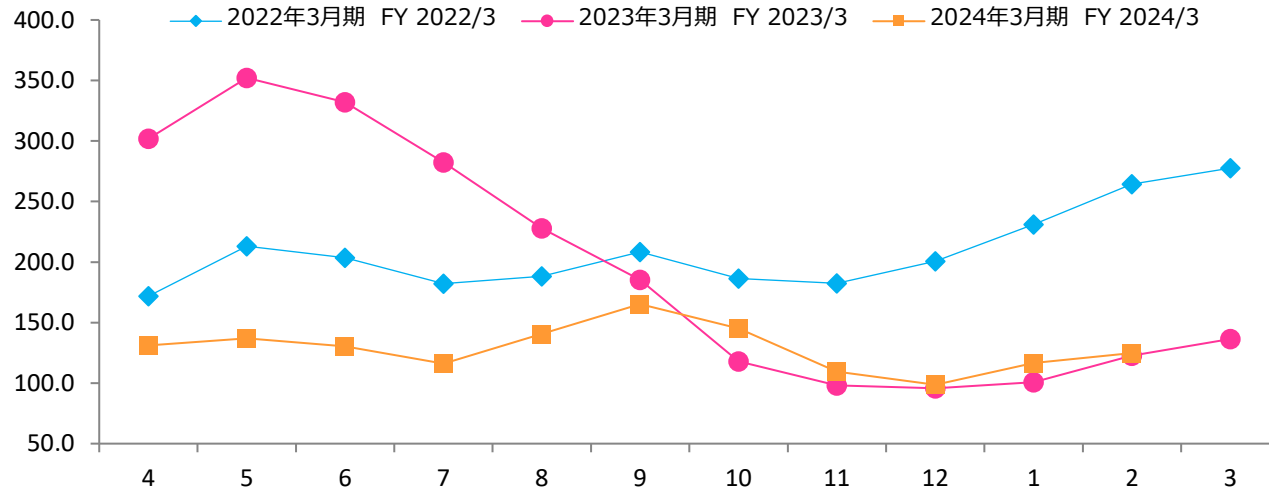
| 前期差 Year-on-year | | 前月差 Month-on-month | |
|---------------------|--|-----------------------|--|
| -10 | | 30 | |

【米国産むね肉価格 (ボンレス)(現地価格)】

U.S. Chicken, Boneless Breast Prices

(セント/ポンド)

(US ¢/lb)



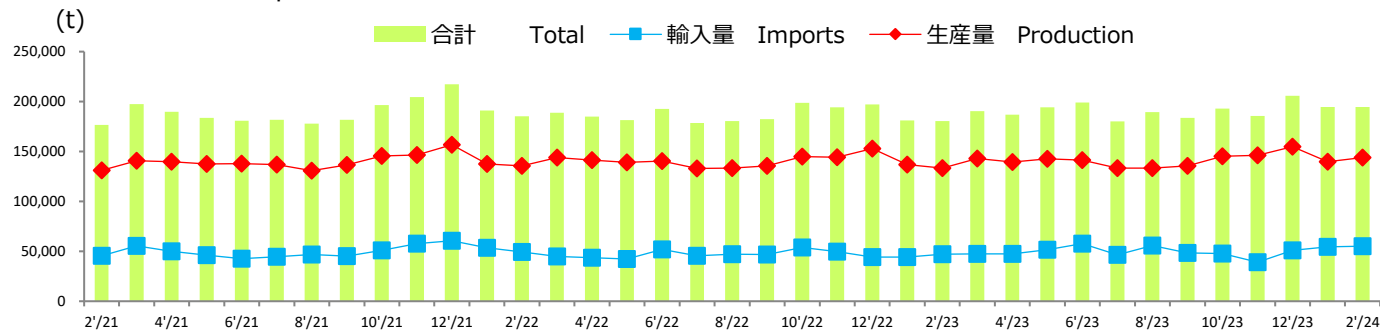
(セント/ポンド)
(US ¢/lb)

| 前期差 Year-on-year | 前月差 Month-on-month |
|---------------------|-----------------------|
| 2.1 | 8.2 |

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

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

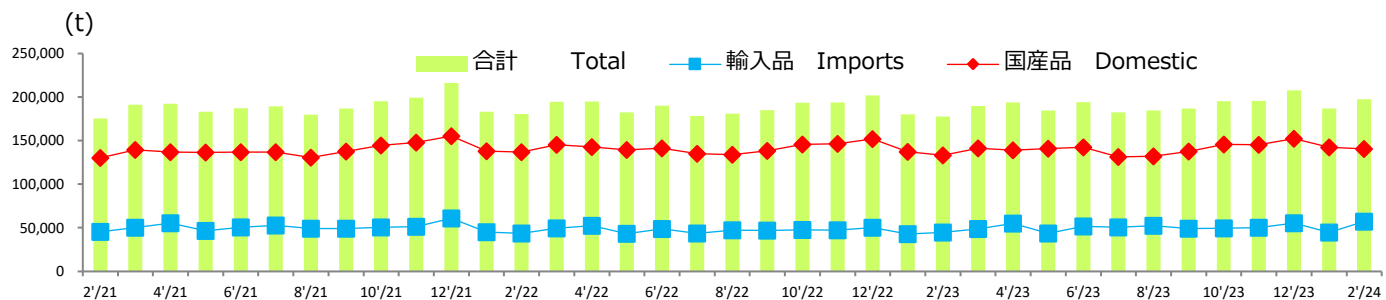
【生産量と輸入量】
Production and Imports



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.

| | 前期差 Year-on-year | 前期比 Rate of change | 前月差 Month-on-Month | 前月比 Rate of change |
|-------------------|---------------------|-----------------------|-----------------------|-----------------------|
| 輸入量 Imports | 8,280 | 118% | 708 | 101% |
| 生産量 Production | 10,535 | 108% | 4,180 | 103% |

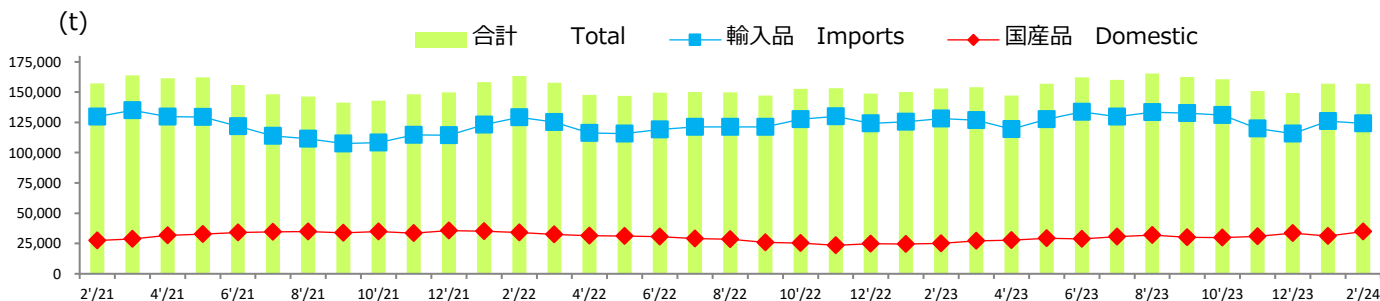
【推定出回り量】
Estimated Marketing Quantity



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

| | 前期差 Year-on-year | 前期比 Rate of change | 前月差 Month-on-Month | 前月比 Rate of change |
|-----------------|---------------------|-----------------------|-----------------------|-----------------------|
| 輸入量 Imports | 12,545 | 128% | 12,665 | 128% |
| 国産品 Domestic | 7,365 | 106% | -1,935 | 99% |

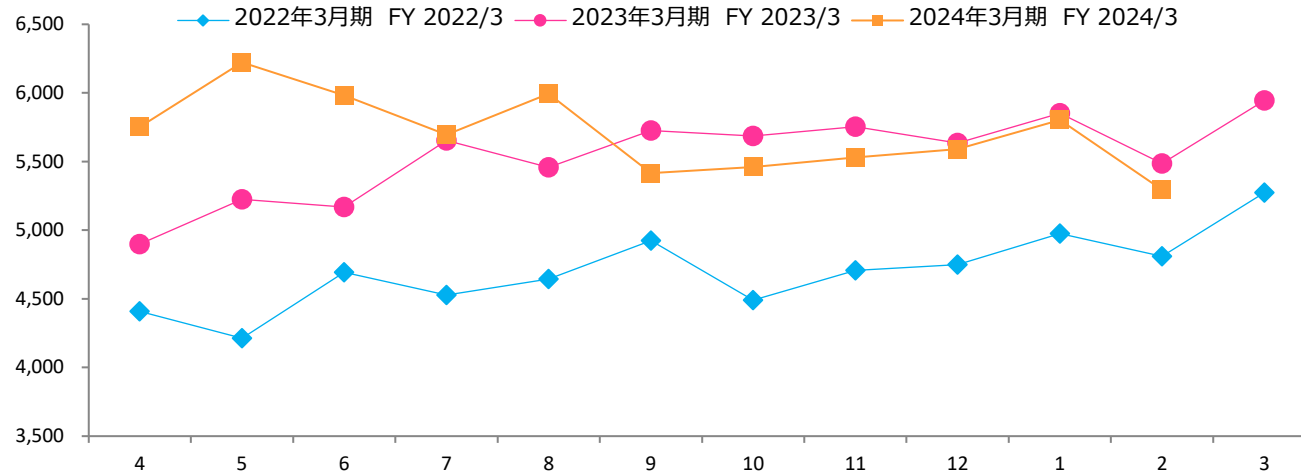
【推定期末在庫】
Estimated Ending Stock



| | 前期差 Year-on-year | 前期比 Rate of change | 前月差 Month-on-Month | 前月比 Rate of change |
|-----------------|---------------------|-----------------------|-----------------------|-----------------------|
| 輸入量 Imports | -3,976 | 97% | -1,740 | 99% |
| 国産品 Domestic | 9,889 | 140% | 3,716 | 112% |

【天然腸輸入価格】 ※主に羊腸(豚腸・牛腸等も含む)

Natural Casing Import Price (CIF) Mainly seep casing including pork & beef casing (¥/kg)



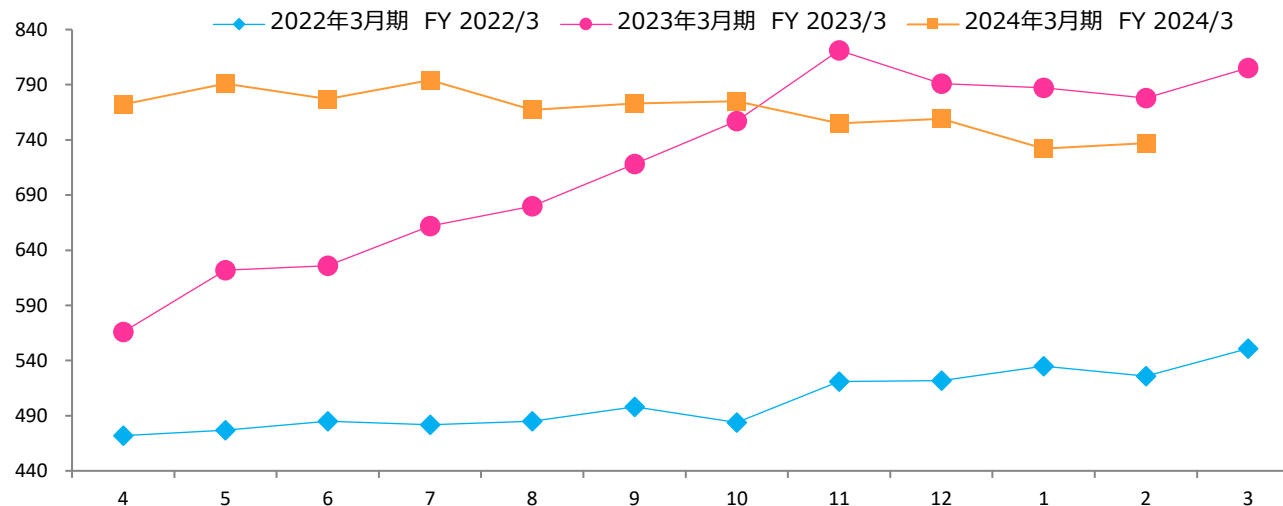
| (¥/kg) | |
|---------------------|-----------------------|
| 前期差 Year-on-year | 前月差 Month-on-month |
| -192 | -508 |

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)

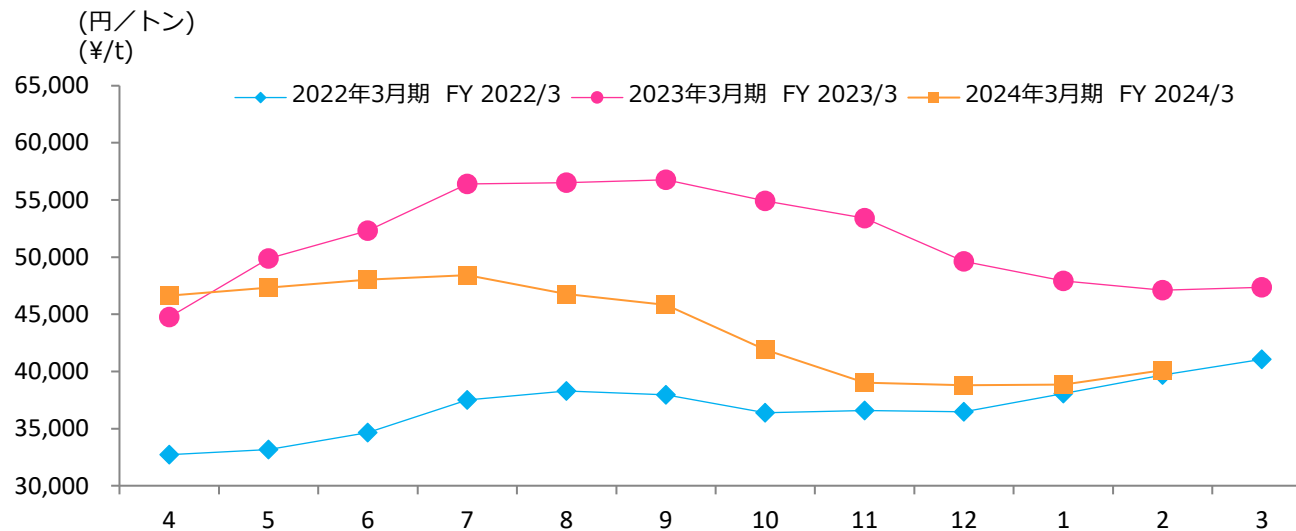


| (¥/kg) | |
|---------------------|-----------------------|
| 前期差 Year-on-year | 前月差 Month-on-month |
| -41 | 5 |

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)

【とうもろこしの輸入価格】

Imported Corn Prices



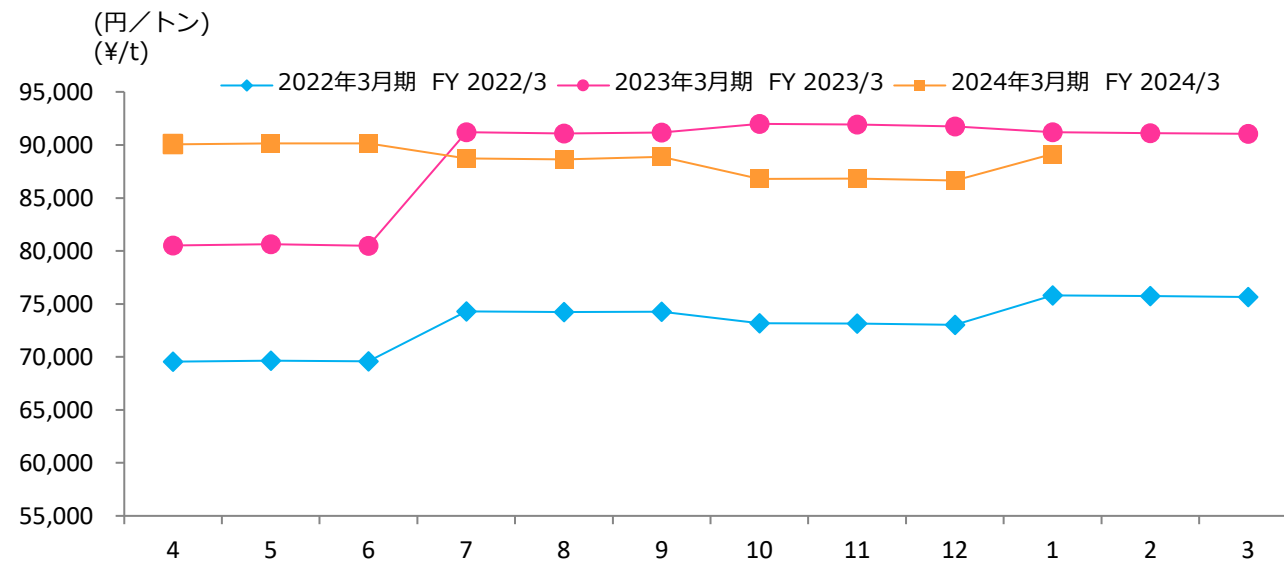
| 前期差 Year-on-year | 前月差 Month-on-month |
|---------------------|-----------------------|
| -6,993 | 1,252 |

(円/トン)
(¥/t)

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



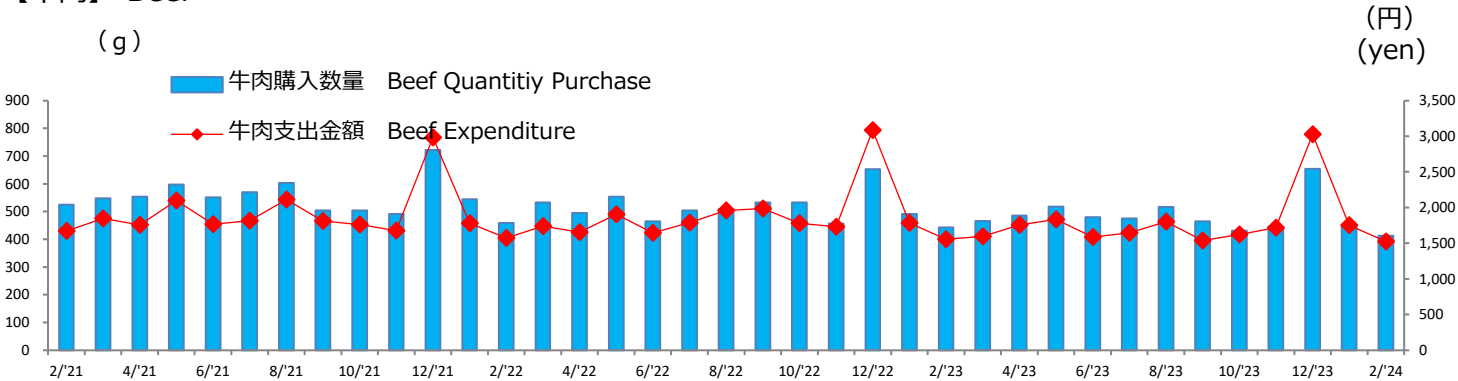
配合飼料の約半分はとうもろこしが占める

| 前期差 Year-on-year | 前月差 Month-on-month |
|---------------------|-----------------------|
| -2,066 | 2,483 |

(円/トン)
(¥/t)

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)

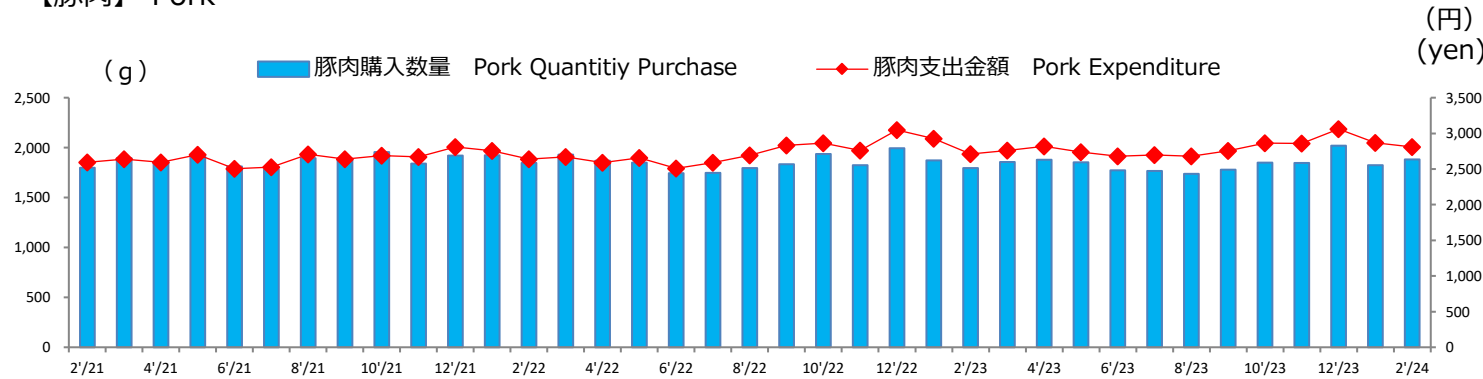
【牛肉】 Beef



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)

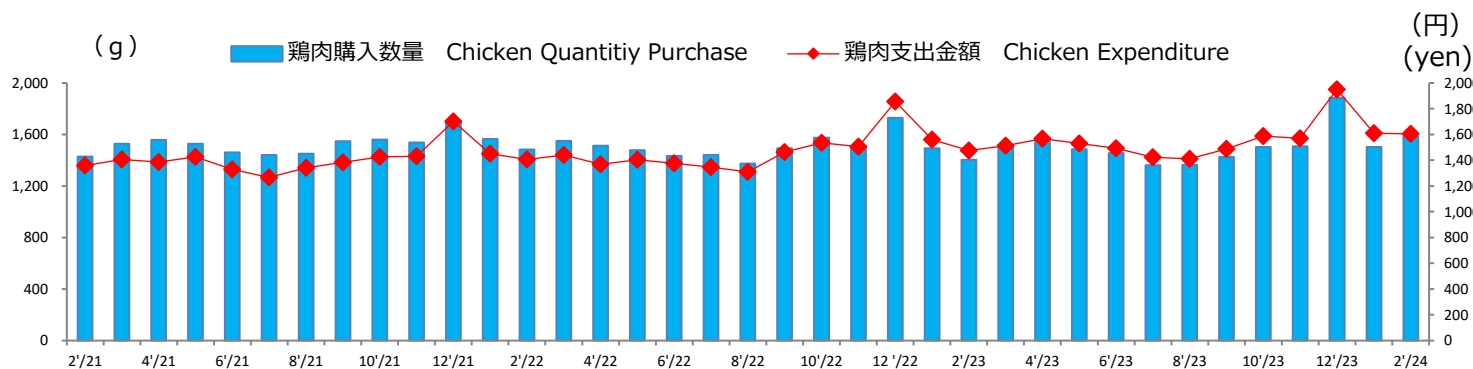
| | 前期差 Year-on-year | 前月差 Month-on-month |
|---------------------------------|---------------------|-----------------------|
| 購入数量(g) Quantity Purchase(g) | -29 | -39 |
| 支出金額(円) Expenditure (yen) | -32 | -230 |

【豚肉】 Pork



| | 前期差 Year-on-year | 前月差 Month-on-month |
|---------------------------------|---------------------|-----------------------|
| 購入数量(g) Quantity Purchase(g) | 88 | 60 |
| 支出金額(円) Expenditure (yen) | 96 | -58 |

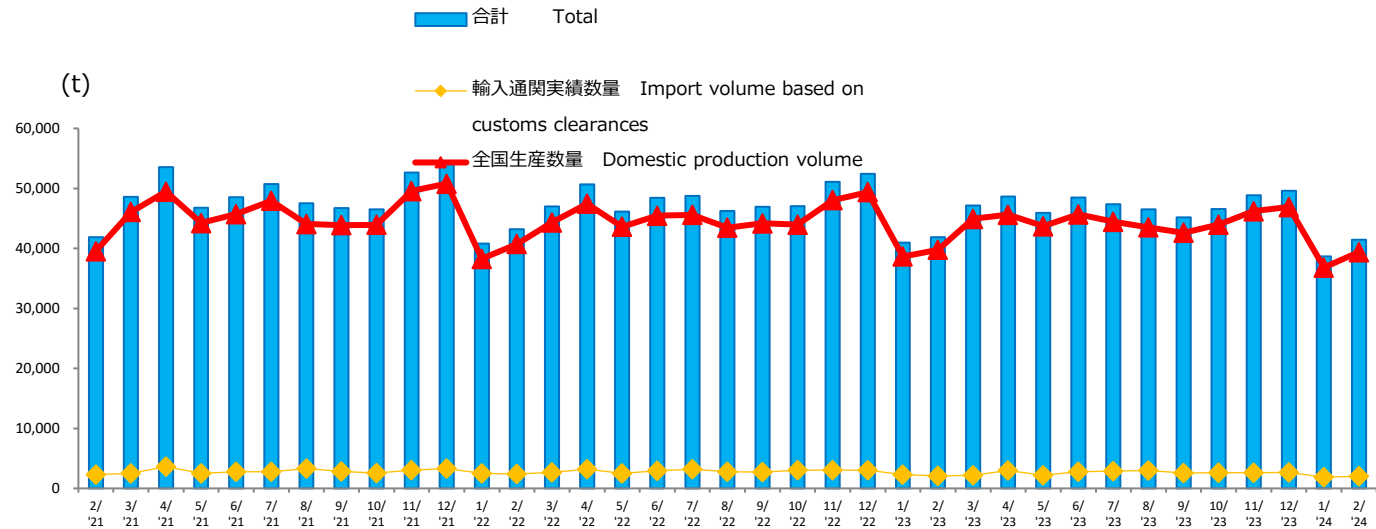
【鶏肉】 Chicken



| | 前期差 Year-on-year | 前月差 Month-on-month |
|---------------------------------|---------------------|-----------------------|
| 購入数量(g) Quantity Purchase(g) | 182 | 83 |
| 支出金額(円) Expenditure (yen) | 130 | -3 |

【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

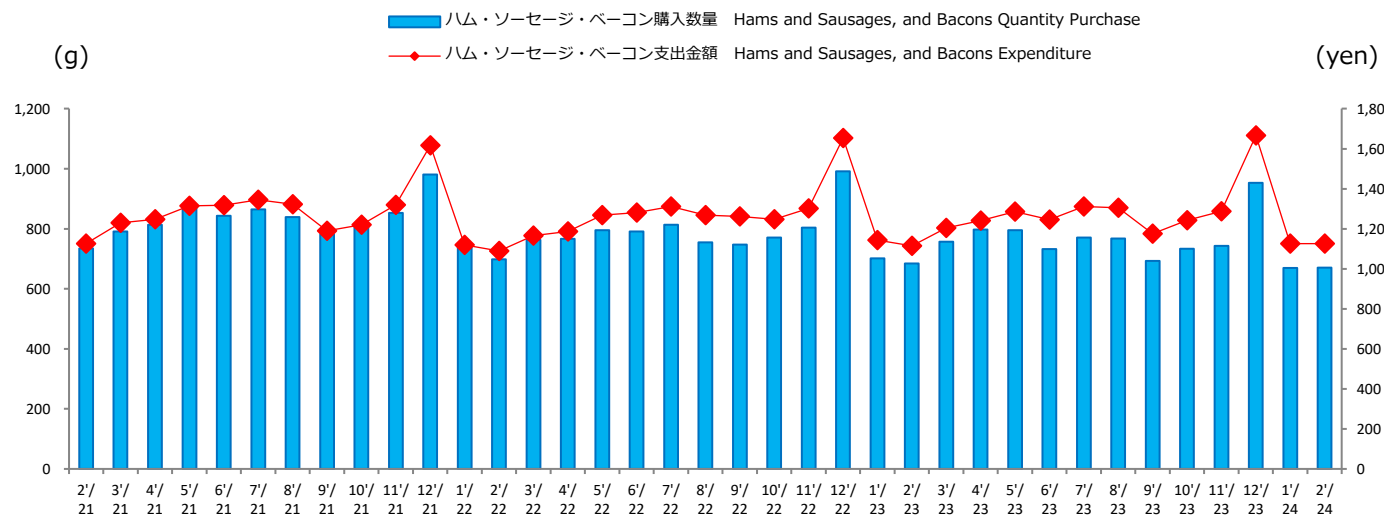


| | 前期差 Year-on-year | 前月差 Month-on-month |
|--------------------|---------------------|-----------------------|
| 輸入量 Imports | -39 | 197 |
| 生産数量 Production | -416 | 2,536 |

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



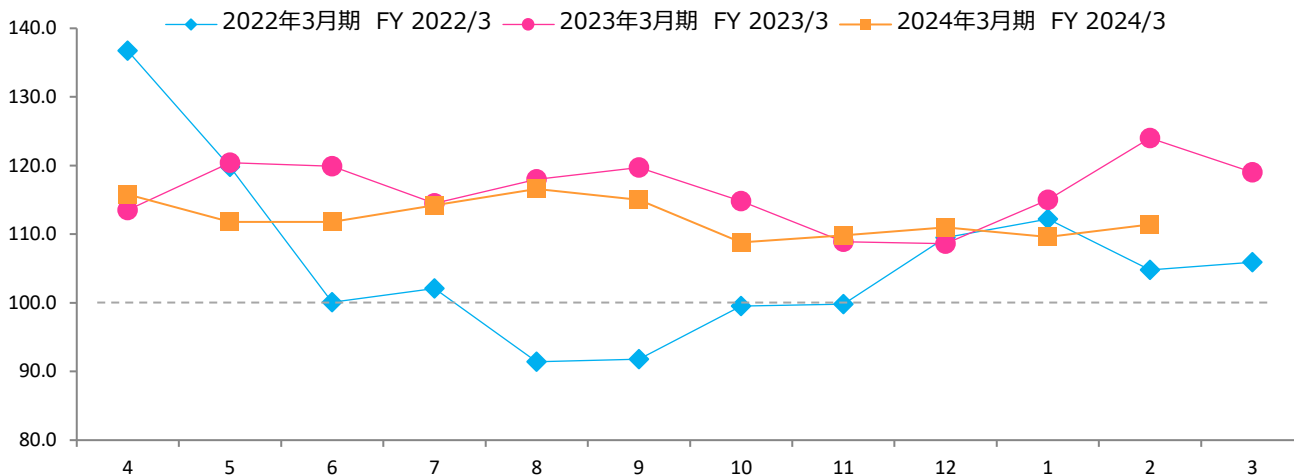
| | 前期差 Year-on-year | 前月差 Month-on-month |
|---------------------------------|---------------------|-----------------------|
| 購入数量(g) Quantity Purchase(g) | -13 | 2 |
| 支出金額(円) Expenditure (yen) | 12 | 1 |

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)

【外食売上高前年同月比】

Year on year comparisons of monthly restaurant sales

(%)



(%)

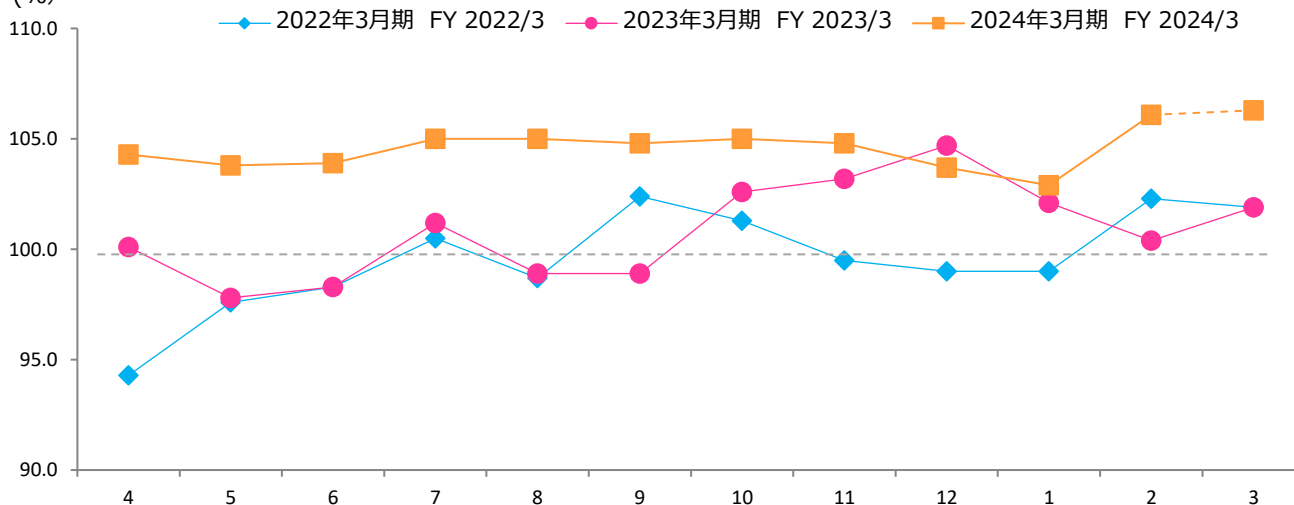
| 前期差 Year-on-year | 前月差 Month-on-month |
|---------------------|-----------------------|
| -12.6 | 1.8 |

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 Year-on-year | 前月差 Month-on-month |
|---------------------|-----------------------|
| 5.7 | 3.2 |

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)
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 |
|----------|---------|---------|---------|-------|-------|---------|---------|-------|-------|-------|-------|-------|---------|
| 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 | 535.1 | 420.3 | 357.7 | 437.7 | 534.5 | 616.8 | 646.1 | 596.4 | 548.4 |
| FY2025/3 | *604.0 | | | | | | | | | | | | #DIV/0! |

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 on) (yen/kg)

| | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Average |
|----------|--------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|
| 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 | 1,391 | 1,410 | 1,503 | 1,515 | 1,533 | 1,523 | 1,545 | 1,588 | 1,509 |
| FY2025/3 | *1,613 | | | | | | | | | | | | #DIV/0! |

米国産 肥育素牛価格(生産者販売価格) (US\$/cwt)/U.S. Cattle Prices, 600-650lb

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

(US\$/cwt)

| | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Average |
|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|
| FY2022/3 | 157.3 | 151.1 | 160.0 | 168.7 | 165.7 | 154.5 | 155.1 | 163.2 | 165.7 | 172.4 | 187.5 | 181.3 | 165.2 |
| FY2023/3 | 176.4 | 170.7 | 177.2 | 187.3 | 190.7 | 185.0 | 175.9 | 182.6 | 191.0 | 192.6 | 208.4 | 221.0 | 188.2 |
| FY2024/3 | 233.5 | 235.5 | 249.8 | 268.3 | 271.2 | 275.1 | 253.8 | 255.8 | 251.0 | 260.3 | 289.3 | | 258.5 |

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 | 309.8 | 308.2 | 307.9 | 303.1 | 299.3 | 292.5 | 289.4 | 295.7 | | 303.5 |

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 |
|----------|--------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|
| 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 | 1,832 | 1,819 | 1,836 | 1,970 | 2,145 | 2,120 | 2,087 | 2,027 | 1,991 |
| FY2025/3 | *2,058 | | | | | | | | | | | | #DIV/0! |

○豚肉相場/Pork Prices(P.7-8)

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 an (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 | 73.9 | 71.5 | 62.4 | 58.1 | 56.2 | 48.7 | 49.8 | 55.2 | | 58.7 |

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 | 112.2 | 105.9 | 98.3 | 90.4 | 86.7 | 83.6 | 87.0 | 89.1 | | 91.5 |

シーズンドポーク(GSP)輸入価格 (CIF, 円/kg) / Seasoned Pork (GSP) Import Prices

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 |
|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|
| FY2022/3 | 374.4 | 402.2 | 411.8 | 431.5 | 443.5 | 455.7 | 468.6 | 452.1 | 454.7 | 437.7 | 436.0 | 482.1 | 437.5 |
| FY2023/3 | 443.1 | 469.7 | 478.5 | 506.0 | 500.2 | 519.1 | 521.2 | 565.6 | 531.6 | 543.0 | 540.4 | 558.5 | 514.7 |
| FY2024/3 | 509.9 | 526.3 | 550.8 | 563.9 | 580.3 | 597.7 | 599.9 | 615.3 | 602.8 | 573.8 | 594.8 | | 574.1 |

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 |
|----------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------|
| FY2023/3 | 513 | 638 | 662 | 671 | 647 | 644 | 619 | 567 | 567 | 530 | 588 | 574 | 602 |
| FY2024/3 | 562 | 645 | 700 | 681 | 714 | 699 | 558 | 519 | 551 | 491 | 594 | 549 | 605 |
| FY2025/3 | *579 | | | | | | | | | | | | #DIV/0! |

○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")

(yen/kg)

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

| | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Average |
|----------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------|
| FY2023/3 | 633 | 636 | 635 | 646 | 659 | 676 | 708 | 740 | 781 | 818 | 815 | 813 | 713 |
| FY2024/3 | 808 | 793 | 761 | 725 | 694 | 667 | 665 | 690 | 711 | 729 | 710 | 687 | 720 |
| FY2025/3 | *664 | | | | | | | | | | | | #DIV/0! |

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 |
|----------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------|
| FY2023/3 | 320 | 326 | 331 | 346 | 360 | 370 | 382 | 403 | 421 | 428 | 421 | 418 | 377 |
| FY2024/3 | 419 | 418 | 417 | 411 | 401 | 389 | 384 | 390 | 393 | 396 | 391 | 385 | 400 |
| FY2025/3 | *375 | | | | | | | | | | | | #DIV/0! |

ブラジル産 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 |
|----------|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------|
| FY2023/3 | 441 | 475 | 478 | 480 | 480 | 480 | 480 | 453 | 403 | 390 | 390 | 400 | 446 |
| FY2024/3 | 415 | 415 | 415 | 444 | 477 | 435 | 435 | 435 | 435 | 390 | 360 | 390 | 421 |
| FY2025/3 | *390 | | | | | | | | | | | | #DIV/0! |

米国 むね肉価格(ボンレス)(セント/ポンド)/U.S. Chicken, Boneless Breast Prices

出所: 農畜産業振興機構

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

| | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Average |
|----------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|
| FY2022/3 | 171.9 | 213.0 | 203.5 | 182.2 | 188.2 | 208.4 | 186.5 | 182.6 | 200.6 | 231 | 264.5 | 277.6 | 209.2 |
| FY2023/3 | 301.9 | 352.1 | 332.1 | 282.4 | 227.8 | 185.4 | 118.1 | 98.2 | 95.8 | 100.7 | 122.8 | 136.6 | 196.2 |
| FY2024/3 | 131.3 | 137.0 | 130.5 | 116.1 | 140.7 | 165.2 | 145.1 | 109.6 | 98.8 | 116.7 | 124.9 | | 128.7 |

○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)(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 | 48,038 | 48,435 | 46,775 | 45,813 | 41,912 | 39,014 | 38,799 | 38,866 | 40,118 | | 43,794 |

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)(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 | 91,758 | 91,209 | 91,111 | 91,054 | 88,680 |
| FY2024/3 | 90,070 | 90,145 | 90,151 | 88,729 | 88,638 | 88,875 | 86,808 | 86,825 | 86,660 | 89,143 | | | 88,604 |

牛肉需給動向/Beef(P.6)

出所：農畜産業振興機構

Notes:1.Boneless cuts equivalent

Source: Agriculture & Livestock Industries Corporation

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 | 66,153 | 62,462 | 62,447 | 905,207 |
| 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 | 336,100 |
| 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 | 569,107 |
| 推定出回り量/Estimated Marketing Quantity | 83,501 | 68,921 | 73,803 | 78,216 | 74,201 | 68,549 | 78,340 | 83,256 | 82,575 | 65,059 | 63,014 | 67,499 | 886,934 |
| 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 | 327,551 |
| 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 | 559,383 |
| 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 | 91,257 | 72,478 | 85,331 | 82,070 | 80,031 | 80,018 | 77,472 | 74,938 | 69,183 | 66,575 | 64,484 | 66,267 | 910,104 |
| うち生産量/Production | 29,736 | 26,724 | 27,668 | 30,071 | 26,525 | 28,106 | 28,863 | 35,525 | 31,727 | 26,660 | 26,497 | 29,499 | 347,601 |
| 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 | 562,503 |
| 推定出回り量/Estimated Marketing Quantity | 92,545 | 67,139 | 73,248 | 73,243 | 70,089 | 73,361 | 77,533 | 76,485 | 75,452 | 66,481 | 64,139 | 70,713 | 880,428 |
| うち国産品/Domestic | 30,582 | 25,485 | 26,872 | 28,991 | 25,876 | 27,015 | 28,569 | 35,235 | 30,858 | 26,963 | 25,467 | 28,484 | 340,397 |
| 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 | 540,030 |
| 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 | 69,363 | 72,450 | 65,124 | 70,757 | 68,440 | 67,648 | 70,578 | 57,914 | | 786,335 |
| うち生産量/Production | 30,303 | 27,295 | 28,420 | 30,670 | 26,782 | 28,101 | 30,423 | 35,031 | 31,556 | 27,314 | 26,904 | | 322,799 |
| うち輸入量/Imports | 67,921 | 46,459 | 43,663 | 38,693 | 45,668 | 37,023 | 40,334 | 33,409 | 36,092 | 43,264 | 31,010 | | 463,536 |
| 推定出回り量/Estimated Marketing Quantity | 87,055 | 72,777 | 71,723 | 69,950 | 70,521 | 68,377 | 75,369 | 79,693 | 75,694 | 65,945 | 61,968 | | 799,072 |
| うち国産品/Domestic | 29,790 | 26,851 | 27,808 | 29,808 | 26,275 | 26,740 | 29,463 | 34,409 | 30,833 | 27,712 | 26,385 | | 316,074 |
| うち輸入品/Imported | 57,265 | 45,926 | 43,915 | 40,142 | 44,246 | 41,637 | 45,907 | 45,284 | 44,861 | 38,233 | 35,582 | | 482,998 |
| 推定期末在庫/Estimated Ending Stock | 160,155 | 160,569 | 160,308 | 159,090 | 160,381 | 156,326 | 150,877 | 138,781 | 129,826 | 133,856 | 129,108 | | - |
| うち国産品/Domestic | 12,371 | 12,252 | 12,243 | 12,474 | 12,343 | 12,902 | 13,026 | 12,805 | 12,619 | 11,618 | 11,442 | | - |
| うち輸入品/Imported | 147,784 | 148,317 | 148,065 | 146,616 | 148,038 | 143,424 | 137,851 | 125,976 | 117,207 | 122,238 | 117,666 | | - |

豚肉需給動向/Pork(P.9)

出所: 農畜産業振興機構

Notes:1.Boneless cuts equivalent

Source: Agriculture & Livestock Industries Corporation

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 | 162,075 | 145,503 | 154,960 | 1,851,626 |
| 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 | 922,632 |
| 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 | 928,994 |
| 推定出回り量/Estimated Marketing Quantity | 176,016 | 143,136 | 146,805 | 149,081 | 145,399 | 150,309 | 159,236 | 167,066 | 164,218 | 153,281 | 143,484 | 153,963 | 1,851,994 |
| 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 | 921,214 |
| 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 | 930,780 |
| 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 | 185,027 | 149,936 | 162,481 | 150,450 | 157,049 | 145,285 | 151,293 | 168,996 | 148,530 | 152,256 | 144,236 | 150,613 | 1,866,152 |
| うち生産量/Production | 76,211 | 72,518 | 73,193 | 67,437 | 70,557 | 72,765 | 75,549 | 81,110 | 79,677 | 77,419 | 72,986 | 81,586 | 901,008 |
| 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 | 965,144 |
| 推定出回り量/Estimated Marketing Quantity | 172,756 | 142,616 | 148,323 | 142,464 | 149,932 | 149,637 | 159,244 | 170,356 | 157,452 | 150,229 | 142,307 | 149,688 | 1,835,004 |
| うち国産品/Domestic | 77,826 | 72,177 | 74,353 | 67,225 | 71,355 | 73,623 | 75,135 | 81,919 | 78,456 | 78,645 | 71,512 | 81,112 | 903,338 |
| 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 | 931,666 |
| 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 | 165,845 | 154,797 | 143,095 | 144,037 | 131,227 | 148,567 | 157,463 | 148,815 | 152,310 | 142,085 | | 1,671,605 |
| うち生産量/Production | 73,794 | 76,116 | 73,486 | 68,264 | 70,175 | 69,500 | 78,467 | 82,650 | 81,152 | 80,283 | 77,558 | | 831,445 |
| うち輸入量/Imports | 109,570 | 89,729 | 81,311 | 74,831 | 73,862 | 61,727 | 70,100 | 74,813 | 67,663 | 72,027 | 64,527 | | 840,160 |
| 推定出回り量/Estimated Marketing Quantity | 168,408 | 146,244 | 153,933 | 146,898 | 146,021 | 144,899 | 160,830 | 165,456 | 161,570 | 149,722 | 148,866 | | 1,692,847 |
| うち国産品/Domestic | 73,311 | 76,372 | 73,928 | 66,926 | 69,796 | 68,945 | 80,065 | 82,084 | 79,774 | 80,748 | 76,853 | | 828,802 |
| うち輸入品/Imported | 95,097 | 69,872 | 80,005 | 79,972 | 76,225 | 75,954 | 80,765 | 83,372 | 81,796 | 68,975 | 72,013 | | 864,046 |
| 推定期末在庫/Estimated Ending Stock | 224,618 | 244,095 | 244,794 | 240,825 | 238,736 | 224,929 | 212,501 | 204,407 | 191,501 | 194,008 | 187,125 | | - |
| うち国産品/Domestic | 20,573 | 20,193 | 19,586 | 20,758 | 21,032 | 21,452 | 19,689 | 20,154 | 21,381 | 20,836 | 21,439 | | - |
| うち輸入品/Imported | 204,045 | 223,902 | 225,208 | 220,067 | 217,704 | 203,477 | 192,812 | 184,253 | 170,120 | 173,172 | 165,686 | | - |

鶏肉需給動向(P.12)

出所:農畜産業振興機構

Notes:1.Bone in cuts equivalent

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。

2.Figures for stocks are estimated by ALIC

Source: Agriculture & Livestock Industries Corporation

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 | 189,998 | 183,875 | 180,831 | 181,888 | 177,873 | 181,799 | 196,728 | 204,498 | 217,595 | 191,275 | 185,242 | 189,062 | 2,280,664 |
| 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 | 1,686,443 |
| 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 | 594,221 |
| 推定出回り量/Estimated Marketing Quantity | 192,388 | 183,120 | 187,150 | 189,466 | 179,837 | 186,748 | 195,208 | 199,148 | 215,921 | 182,873 | 180,372 | 194,582 | 2,286,813 |
| 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 | 1,682,730 |
| 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 | 604,083 |
| 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 | 184,946 | 181,579 | 192,767 | 178,797 | 180,698 | 182,380 | 198,885 | 194,216 | 197,376 | 181,373 | 180,644 | 190,643 | 2,244,304 |
| うち生産量/Production | 141,380 | 139,096 | 140,591 | 133,177 | 133,324 | 135,582 | 144,955 | 144,433 | 153,097 | 137,012 | 133,529 | 143,098 | 1,679,274 |
| うち輸入量/Imports | 43,566 | 42,483 | 52,176 | 45,620 | 47,374 | 46,798 | 53,930 | 49,783 | 44,279 | 44,361 | 47,115 | 47,545 | 565,030 |
| 推定出回り量/Estimated Marketing Quantity | 194,953 | 182,362 | 190,061 | 178,354 | 180,995 | 185,034 | 193,226 | 193,624 | 201,864 | 180,176 | 177,573 | 189,833 | 2,248,055 |
| うち国産品/Domestic | 142,526 | 139,281 | 141,237 | 134,809 | 133,706 | 138,240 | 145,581 | 146,278 | 151,826 | 137,223 | 132,983 | 141,028 | 1,684,718 |
| 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 | 563,337 |
| 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 | 186,906 | 194,387 | 199,264 | 180,151 | 189,467 | 183,938 | 193,147 | 185,549 | 205,938 | 194,571 | 199,459 | | 2,112,777 |
| うち生産量/Production | 139,494 | 142,670 | 141,558 | 133,465 | 133,512 | 135,566 | 145,342 | 146,368 | 154,957 | 139,884 | 144,064 | | 1,556,880 |
| うち輸入量/Imports | 47,412 | 51,717 | 57,706 | 46,686 | 55,955 | 48,372 | 47,805 | 39,181 | 50,981 | 54,687 | 55,395 | | 555,897 |
| 推定出回り量/Estimated Marketing Quantity | 193,758 | 184,592 | 193,898 | 182,145 | 184,352 | 186,724 | 195,013 | 195,396 | 207,560 | 186,753 | 197,483 | | 2,107,674 |
| うち国産品/Domestic | 138,996 | 140,874 | 142,303 | 131,459 | 132,118 | 137,515 | 145,637 | 145,249 | 152,279 | 142,283 | 140,348 | | 1,549,061 |
| うち輸入品/Imported | 54,762 | 43,718 | 51,595 | 50,686 | 52,234 | 49,209 | 49,376 | 50,147 | 55,281 | 44,470 | 57,135 | | 558,613 |
| 推定期末在庫/Estimated Ending Stock | 147,050 | 156,845 | 162,211 | 160,217 | 165,332 | 162,546 | 160,680 | 150,833 | 149,211 | 157,029 | 159,005 | | - |
| うち国産品/Domestic | 27,547 | 29,343 | 28,598 | 30,604 | 31,998 | 30,049 | 29,754 | 30,873 | 33,551 | 31,152 | 34,868 | | - |
| うち輸入品/Imported | 119,503 | 127,502 | 133,613 | 129,613 | 133,334 | 132,497 | 130,926 | 119,960 | 115,660 | 125,877 | 124,137 | | - |

○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 | 5,696 | 5,993 | 5,416 | 5,460 | 5,529 | 5,590 | 5,802 | 5,294 | | 5,703 |

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 a' (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 | 794 | 767 | 773 | 775 | 755 | 759 | 732 | 737 | | 767 |

○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 | 44,442 | 43,512 | 42,591 | 43,954 | 46,215 | 46,897 | 36,828 | 39,364 | | 478,776 |
| 輸入量/Imports | 3,021 | 2,209 | 2,788 | 2,908 | 3,000 | 2,575 | 2,606 | 2,632 | 2,679 | 1,856 | 2,053 | | 28,327 |
| 合計/Supplied Quantity | 48,636 | 45,898 | 48,457 | 47,350 | 46,512 | 45,166 | 46,560 | 48,847 | 49,576 | 38,684 | 41,417 | | 507,103 |

○「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 Expenditure Survey"

Two-or-more-person Households(Not including agricultural,forestry and fisheries households)

(g)

| 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 | 771 | 767 | 693 | 733 | 743 | 963 |
| 牛肉購入数量/Beef | 491 | 442 | 466 | 485 | 518 | 479 | 475 | 516 | 465 | 431 | 445 | 654 |
| 豚肉購入数量/Pork | 1,872 | 1,795 | 1,857 | 1,879 | 1,852 | 1,774 | 1,765 | 1,737 | 1,781 | 1,850 | 1,848 | 2,021 |
| 鶏肉購入数量/Chicken | 1,491 | 1,402 | 1,497 | 1,572 | 1,485 | 1,455 | 1,361 | 1,363 | 1,424 | 1,502 | 1,508 | 1,885 |

| 2024 | 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 | 669 | 671 | | | | | | | | | | |
| 牛肉購入数量/Beef | 452 | 413 | | | | | | | | | | |
| 豚肉購入数量/Pork | 1,823 | 1,883 | | | | | | | | | | |
| 鶏肉購入数量/Chicken | 1,501 | 1,584 | | | | | | | | | | |

○「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)

| 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 | 1,311 | 1,305 | 1,175 | 1,242 | 1,288 | 1,666 |
| 牛肉支出金額//Beef | 1,783 | 1,554 | 1,596 | 1,758 | 1,833 | 1,587 | 1,643 | 1,800 | 1,536 | 1,621 | 1,715 | 3,025 |
| 豚肉支出金額/Pork | 2,925 | 2,712 | 2,762 | 2,817 | 2,740 | 2,681 | 2,698 | 2,681 | 2,755 | 2,862 | 2,860 | 3,060 |
| 鶏肉支出金額/Chicken | 1,559 | 1,475 | 1,511 | 1,566 | 1,530 | 1,492 | 1,422 | 1,411 | 1,487 | 1,587 | 1,569 | 1,950 |

| 2024 | 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 | 1,125 | 1,126 | | | | | | | | | | |
| 牛肉支出金額//Beef | 1,752 | 1,522 | | | | | | | | | | |
| 豚肉支出金額/Pork | 2,866 | 2,808 | | | | | | | | | | |
| 鶏肉支出金額/Chicken | 1,608 | 1,605 | | | | | | | | | | |

○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 Foodservice 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 | 114.2 | 116.6 | 115.0 | 108.8 | 109.8 | 111.0 | 109.6 | 111.4 | | 112.3 |

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 | 105.0 | 104.8 | 105.0 | 104.8 | 103.7 | 102.9 | 106.1 | *106.3 | 104.5 |

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