

2024年9月度 市場動向資料集

September 2024 Market Trends

日本八ム株式会社
NH Foods Ltd.
October 25, 2024



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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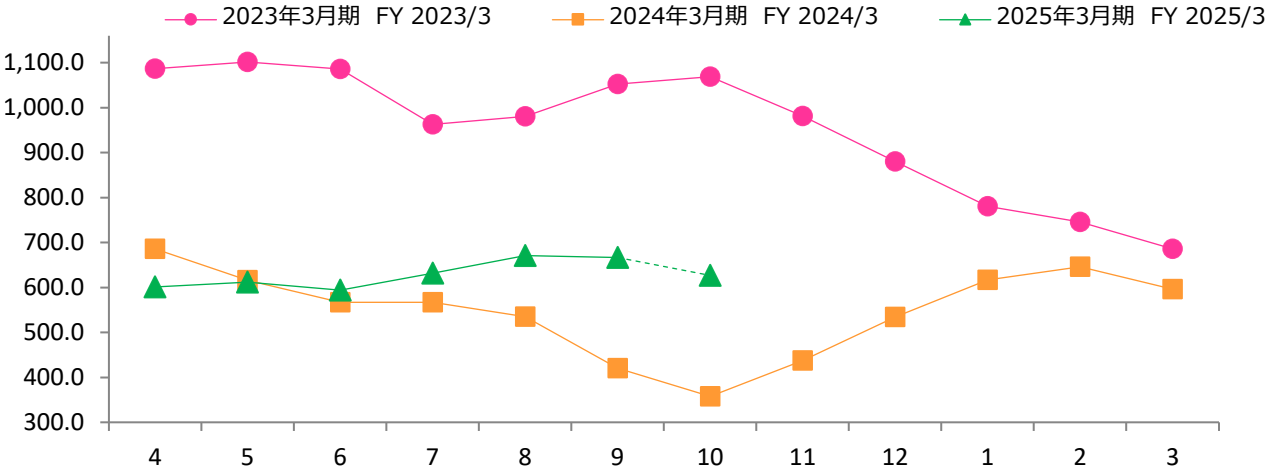
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【豪州産 若齢牛価格(生産者販売価格) (現地価格)】

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
246.1	-4.9

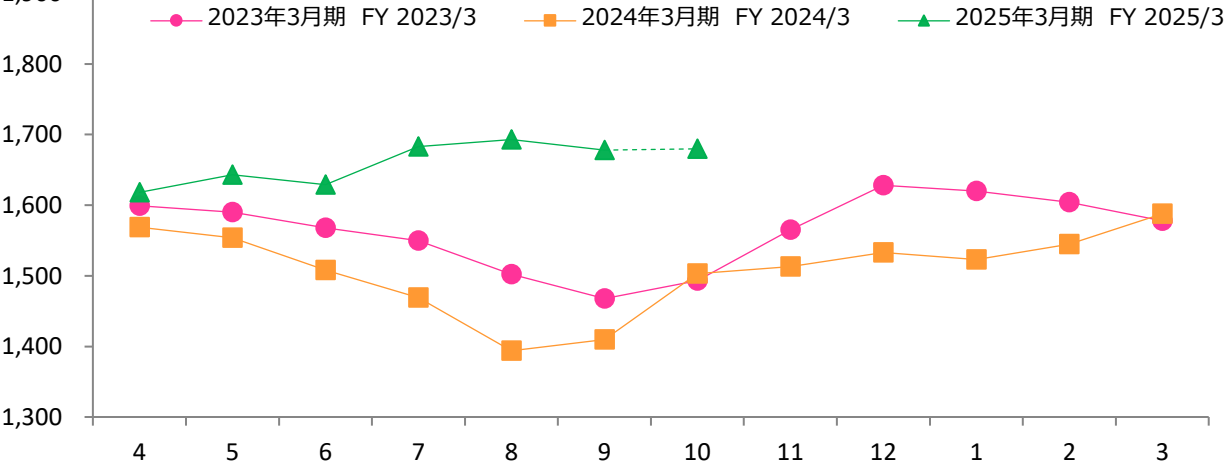
グラフ資料出所: 豪州食肉家畜生産者事業団
Source : MEAT & LIVESTOCK AUSTRALIA

【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.

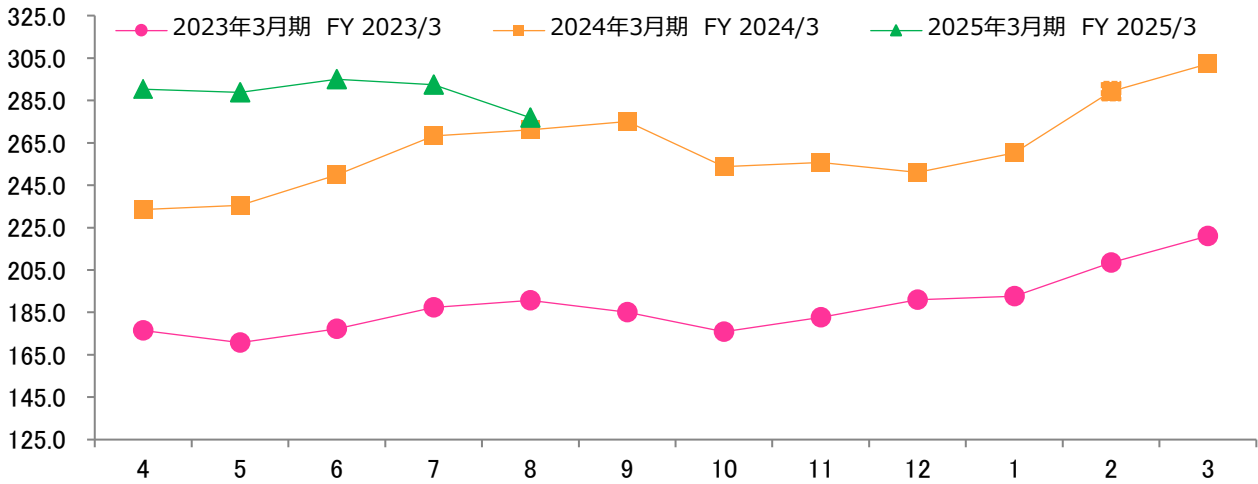


ショートグレイン: 穀物肥育期間 100日以上
Short Grain Fed: Grain Fed period 100 days or more
フルセット: セット販売(基本12部位) ⇔ パーツ販売
Full Set: Set Price of primal 12 items ⇔ Single item Sales

(¥/kg)	
前期差 Year-on-year	前月差 Month-on-month
268.0	-15.0

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(全て単純平均単価)
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

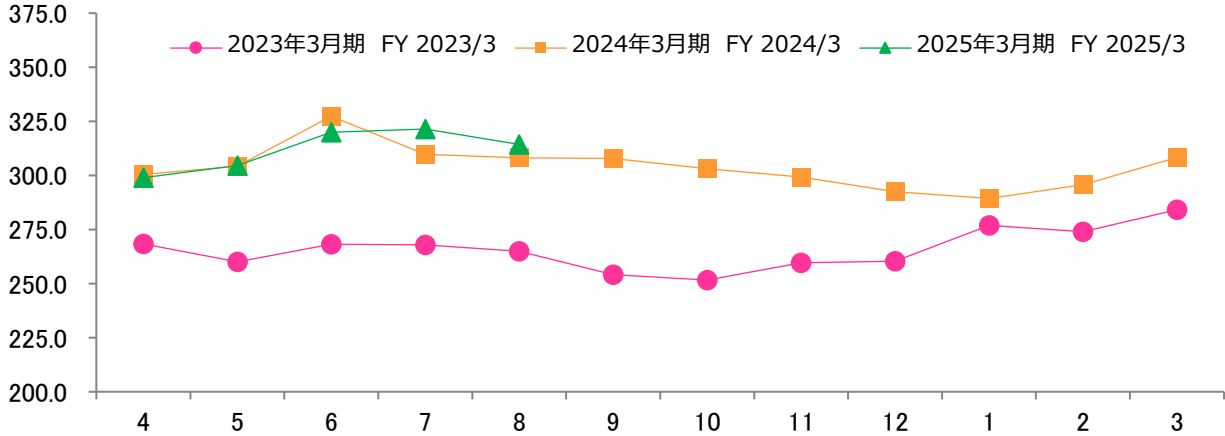


(US \$/cwt)	
前期差 Year-on-year	前月差 Month-on-month
5.7	-15.6

グラフ資料出所：農畜産業振興機構
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

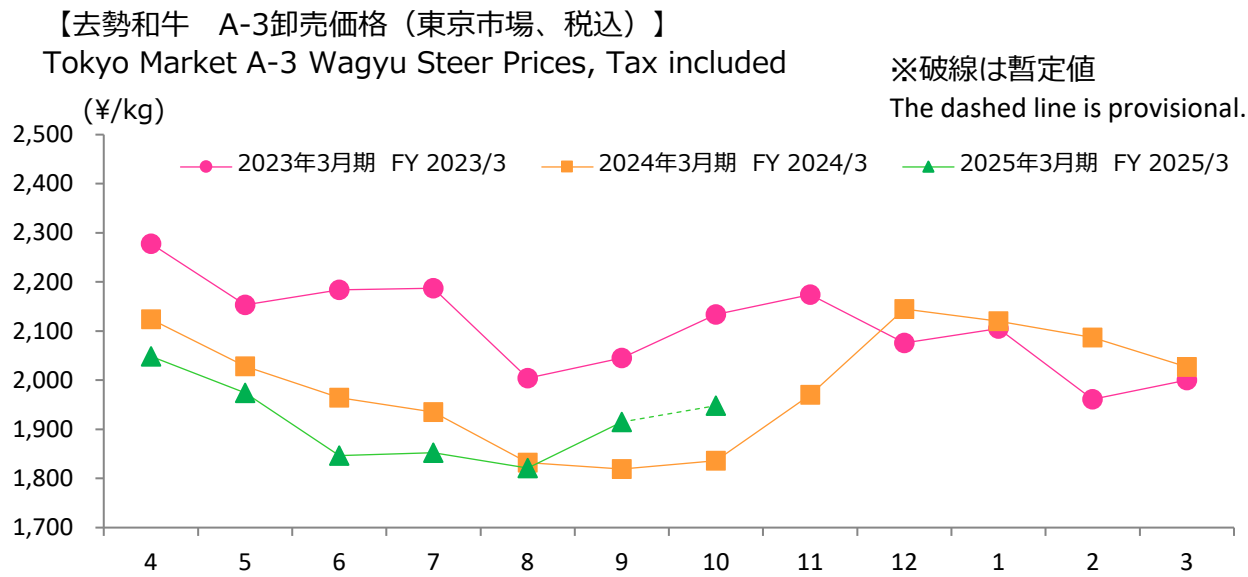
(ドル/100ポンド)
(US \$/cwt)



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
6.1	-7.1

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

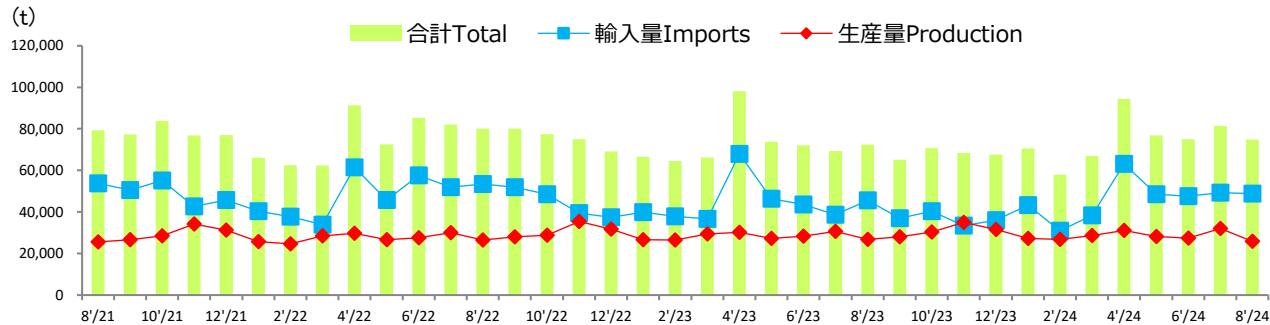


A-3：格付けランク、歩留まり等級A～C / 肉質等級1～5
Yield Grade A-C / Meat Quality Grade 1-5

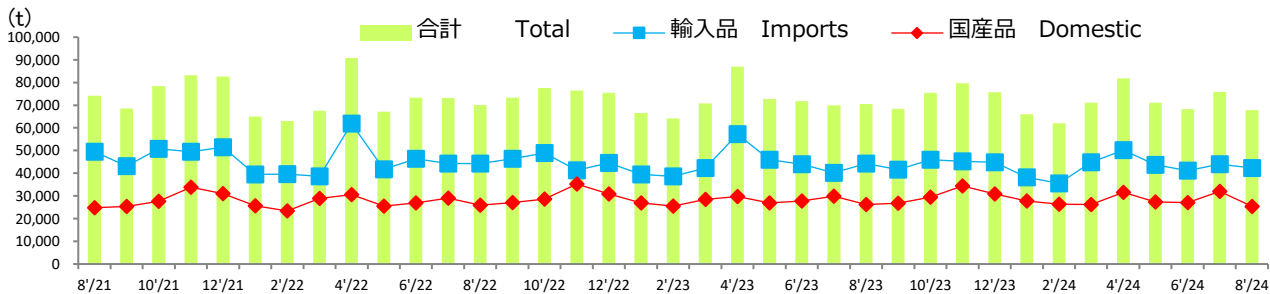
(¥/kg)	
前期差 Year-on-year	前月差 Month-on-month
96.0	94.0

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

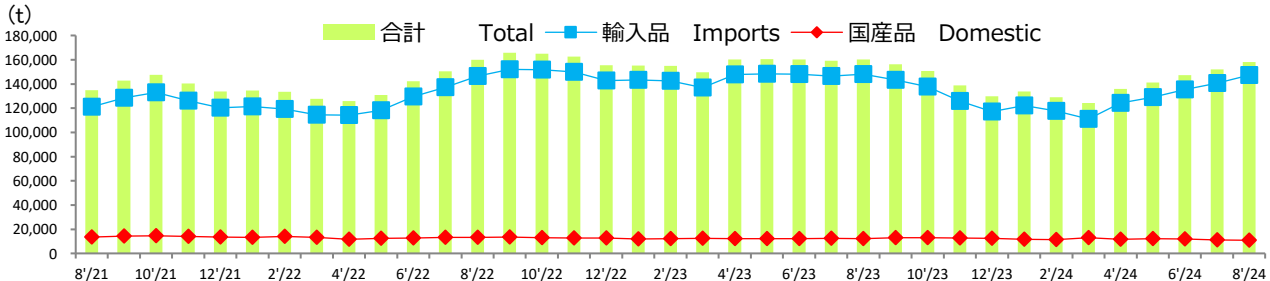
【生産量と輸入量】
Production and Imports



【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

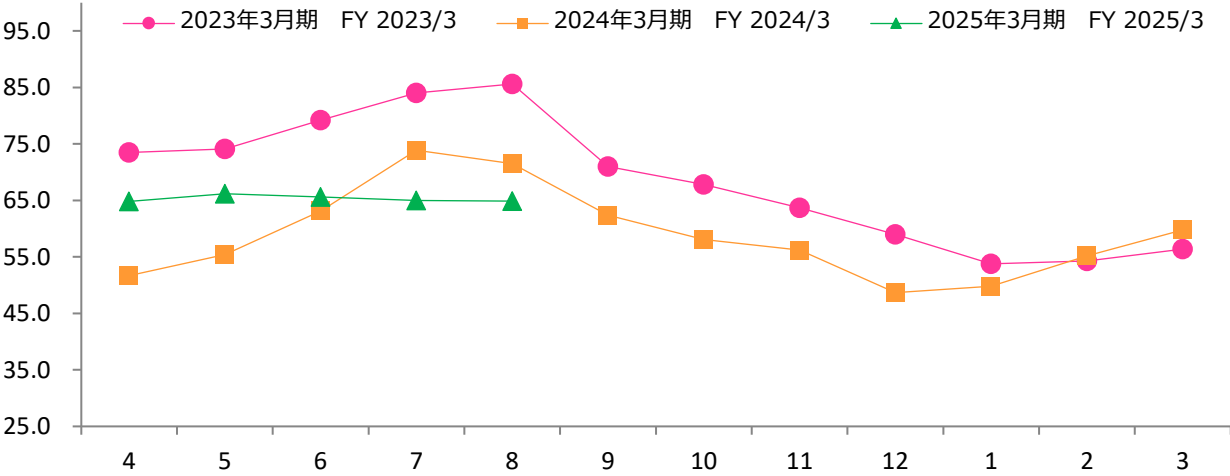
	前期差 Year-on-year	前期比 Rate of change	前月差 Month-on-Month	前月比 Rate of change
輸入量 Imports	3,229	107%	-445	99%
生産量 Production	-897	97%	-6,204	81%

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

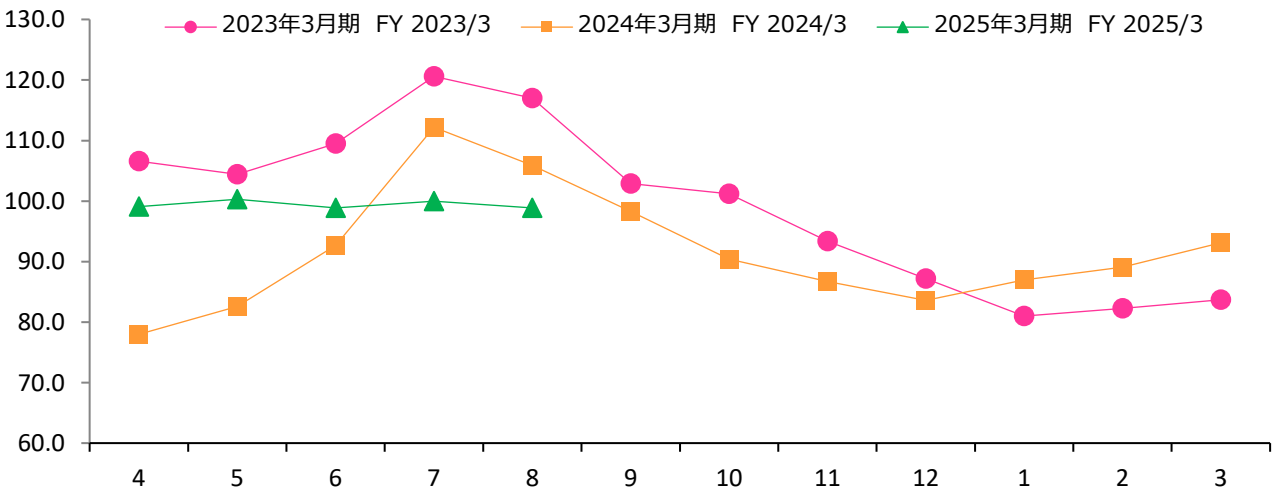
	前期差 Year-on-year	前期比 Rate of change	前月差 Month-on-Month	前月比 Rate of change
輸入量 Imports	-1,910	96%	-1,623	96%
国産品 Domestic	-850	97%	-6,530	80%

	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	-750	99%	6,561	105%
国産品 Domestic	-1,377	89%	-305	97%

【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
-6.6	-0.1

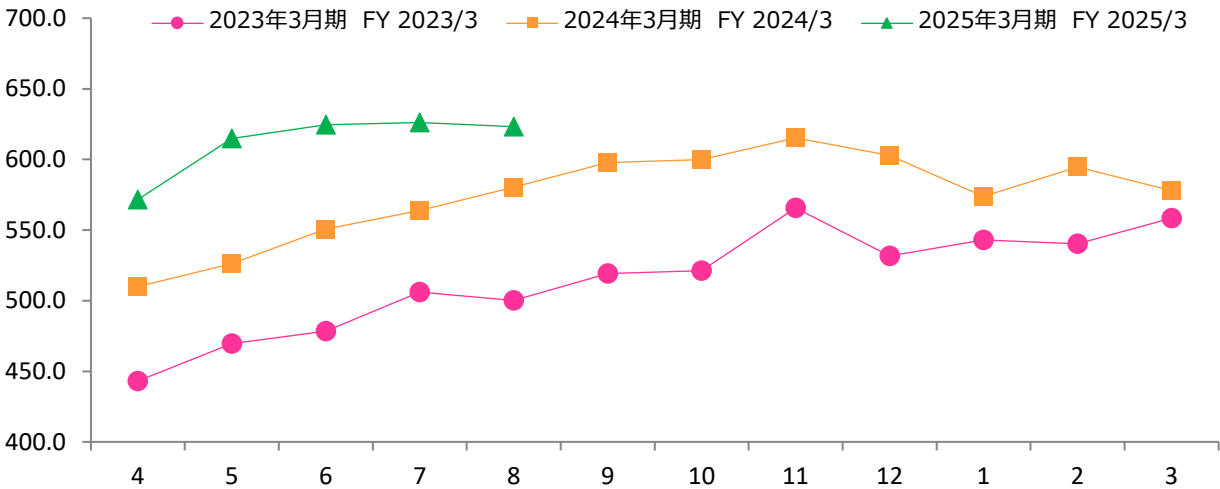
グラフ資料出所：農畜産業振興機構（全て単純平均単価）
Source : Agriculture & Livestock Industries Corporation (all graphs based on average prices)

(ドル/100ポンド)
(US \$/cwt)

前期差 Year-on-year	前月差 Month-on-Month
-7.0	-1.1

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

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

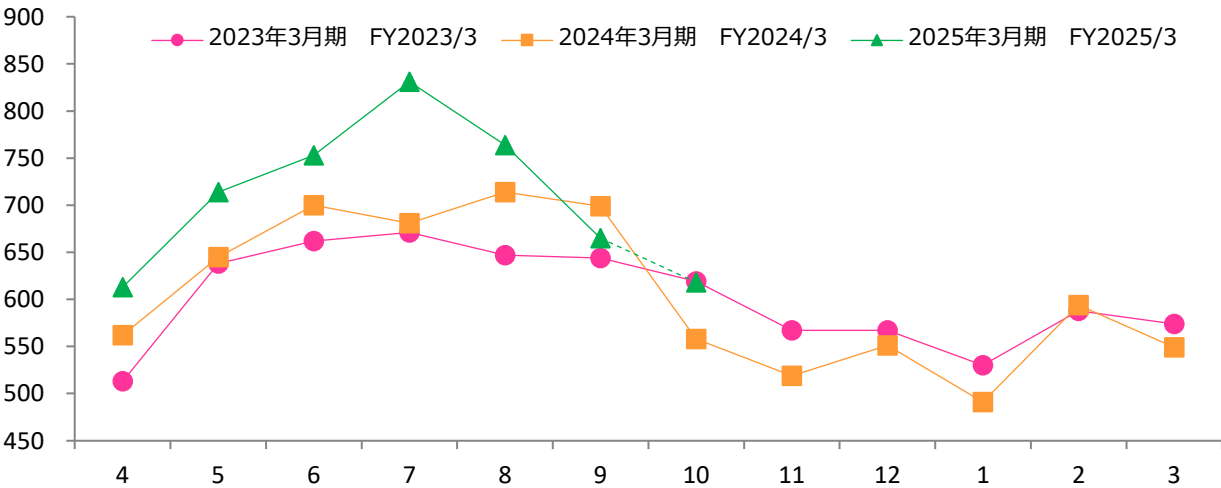


シーズンドポーク (豚肉調整品):主にソーセージ等の加工原料用
Mainly used for sausages

(¥/kg)	
前期差 Year-on-year	前月差 Month-on-month
43.0	-2.9

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.

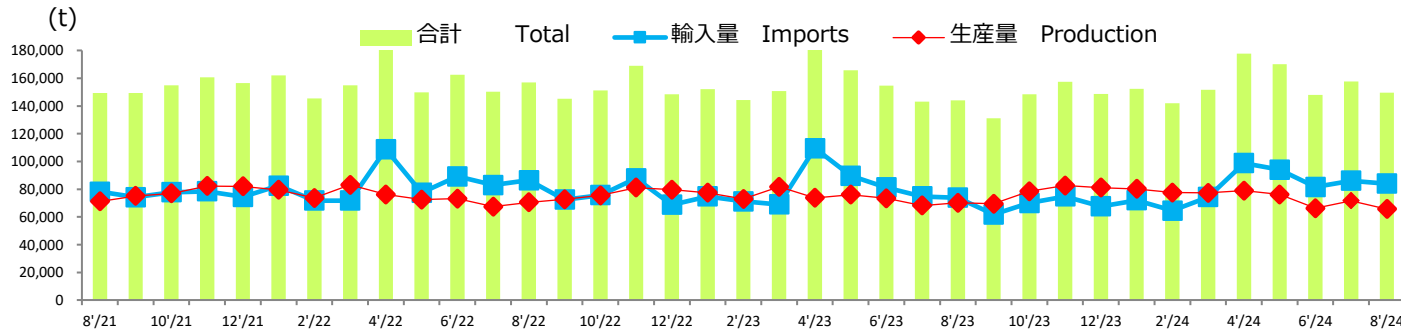
上物：等級(極上、上、中、並、等外)

(¥/kg)	
前期差 Year-on-year	前月差 Month-on-month
-34.0	-99.0

グラフ資料出所：東京食肉市場株式会社
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

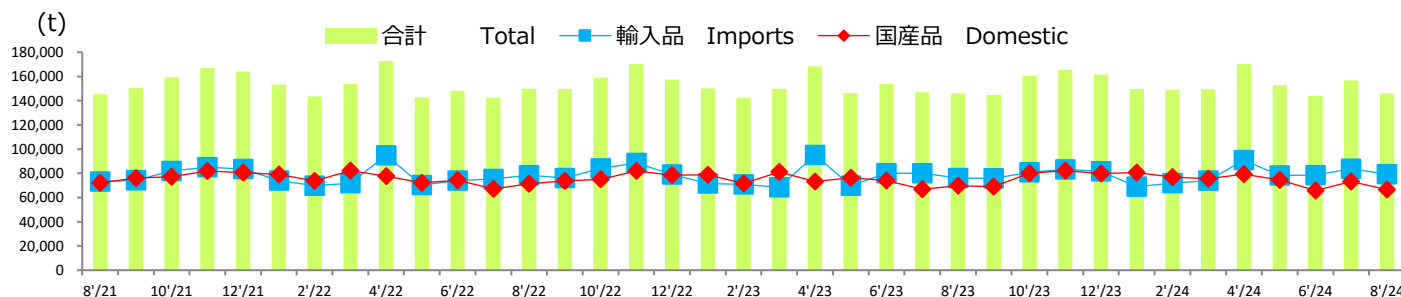


グラフ資料出所：農畜産業振興機構
Source: Agriculture & Livestock Industries Corporation

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	10,216	114%	-2,077	98%
生産量 Production	-4,524	94%	-6,028	92%

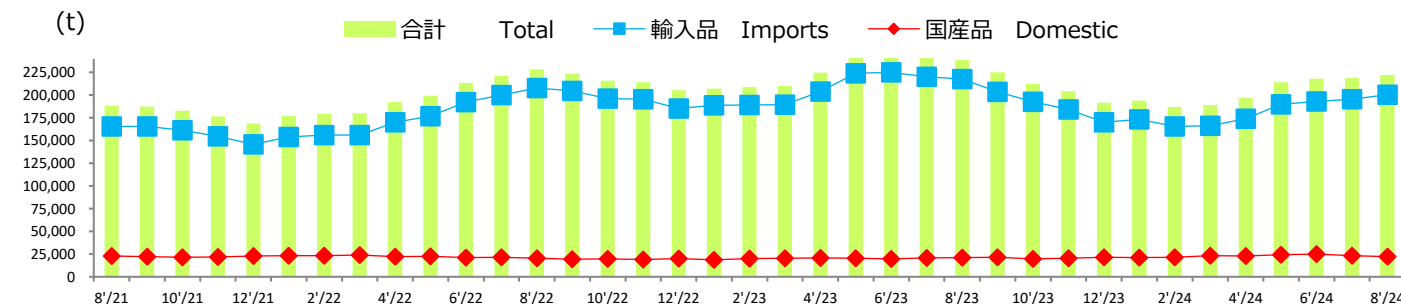
【推定出回り量】
Estimated Marketing Quantity



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	3,092	104%	-4,465	95%
国産品 Domestic	-3,121	96%	-6,426	91%

【推定期末在庫】
Estimated Ending Stock

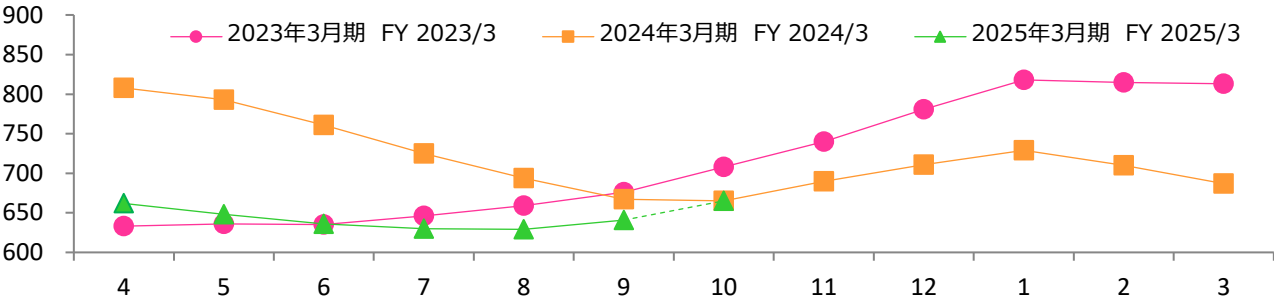


	前期差 Year-on-year	前期比 Rate of change	前月差 Month-on-Month	前月比 Rate of change
輸入量 Imports	-17,414	92%	4,761	102%
国産品 Domestic	1,079	105%	-1,119	95%

【国産鶏肉卸売価格（もも肉、税抜）】

Domestic Chicken Thigh Meat Wholesale Prices
(¥/kg)

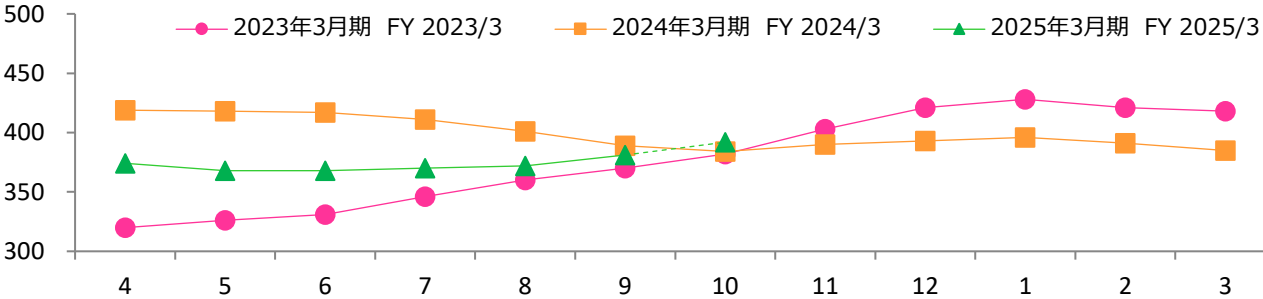
※破線は暫定値
The dashed line is provisional.



【国産鶏肉卸売価格（むね肉、税抜）】

Domestic Chicken Breast Meat Wholesale Prices
(¥/kg)

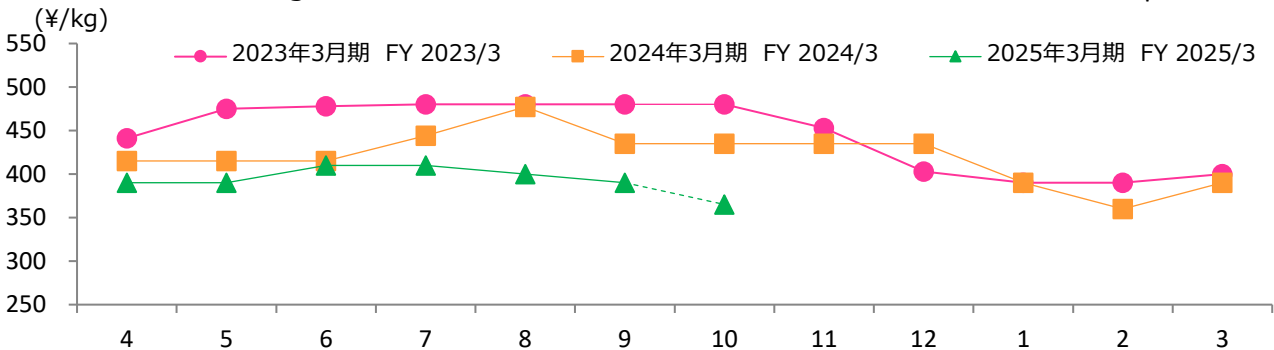
※破線は暫定値
The dashed line is provisional.



【ブラジル産もも肉価格】

Brazilian Chicken Thigh Prices
(¥/kg)

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



(¥/kg)	
前期差 Year-on-year	前月差 Month-on-month
-26.0	12.0

グラフ資料出所：農畜産業振興機構、農林水産省「食鳥市況情報」
Source : Agriculture & Livestock Industries Corporation, MAFF "Survey of Broiler Wholesale price"

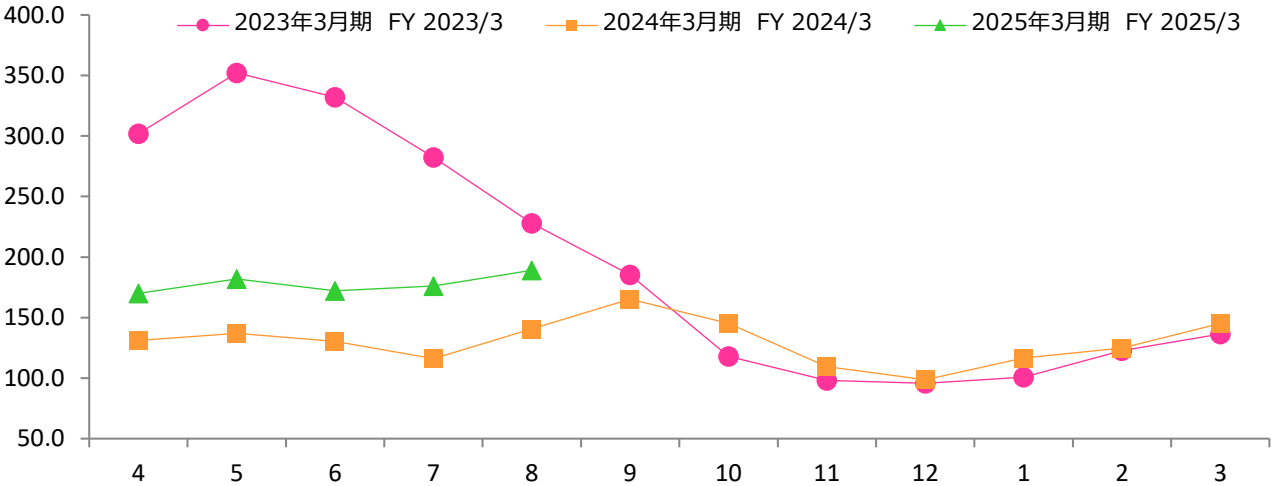
(¥/kg)	
前期差 Year-on-year	前月差 Month-on-month
-8.0	9.0

グラフ資料出所：農畜産業振興機構、農林水産省「食鳥市況情報」
Source : Agriculture & Livestock Industries Corporation, MAFF "Survey of Broiler Wholesale price"

(¥/kg)	
前期差 Year-on-year	前月差 Month-on-month
-45.0	-10.0

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(全て単純平均単価)
Source : "DAILY MEAT & LIVESTOCK" which is a trade business paper published in Japan
(all graphs based on average prices)

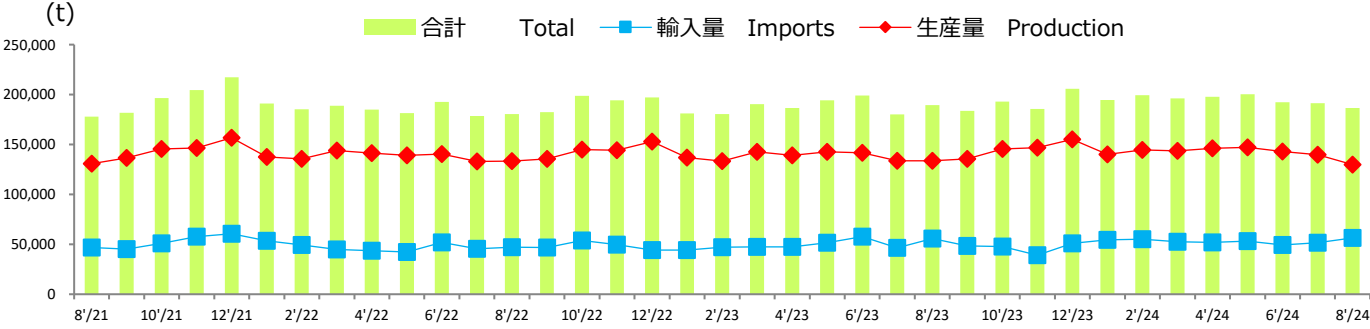
【米国産むね肉価格 (ボンレス)(現地価格)】
U.S. Chicken, Boneless Breast Prices
(セント/ポンド)
(US ¢ /lb)



(セント/ポンド) (US ¢ /lb)	
前期差 Year-on-year	前月差 Month-on-month
48.4	12.9

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

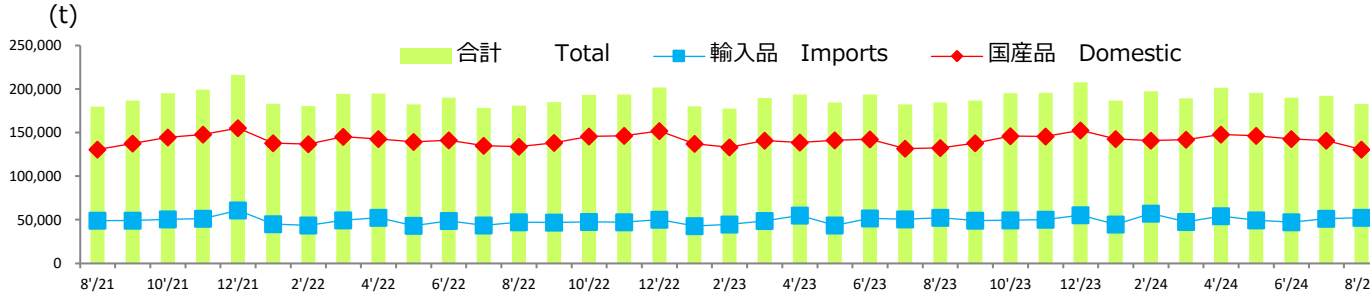
【生産量と輸入量】
Production and Imports



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	742	101%	4,919	110%
生産量 Production	-3,667	97%	-9,694	93%

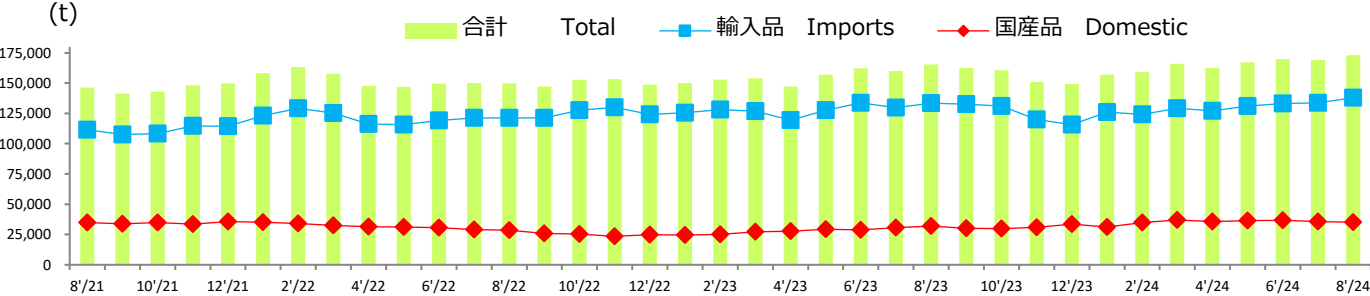
【推定出回り量】
Estimated Marketing Quantity



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

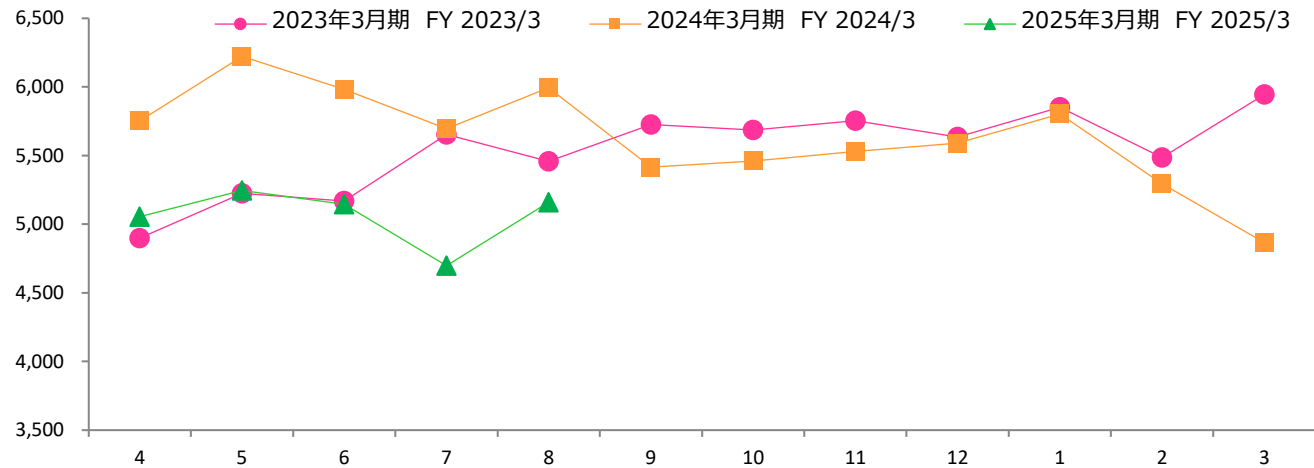
	前期差 Year-on-year	前期比 Rate of change	前月差 Month-on-Month	前月比 Rate of change
輸入量 Imports	116	100%	1,100	102%
国産品 Domestic	-1,899	99%	-10,560	93%

【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	4,607	103%	4,347	103%
国産品 Domestic	3,096	110%	-374	99%

【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)

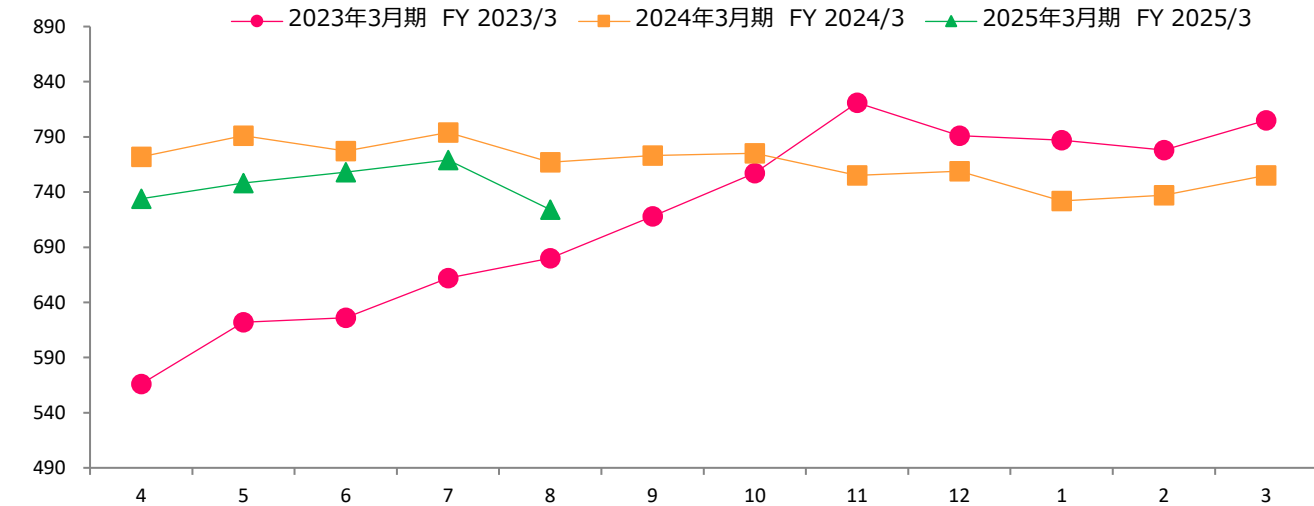


(¥/kg)

前期差 Year-on-year	前月差 Month-on-month
-835	460

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)

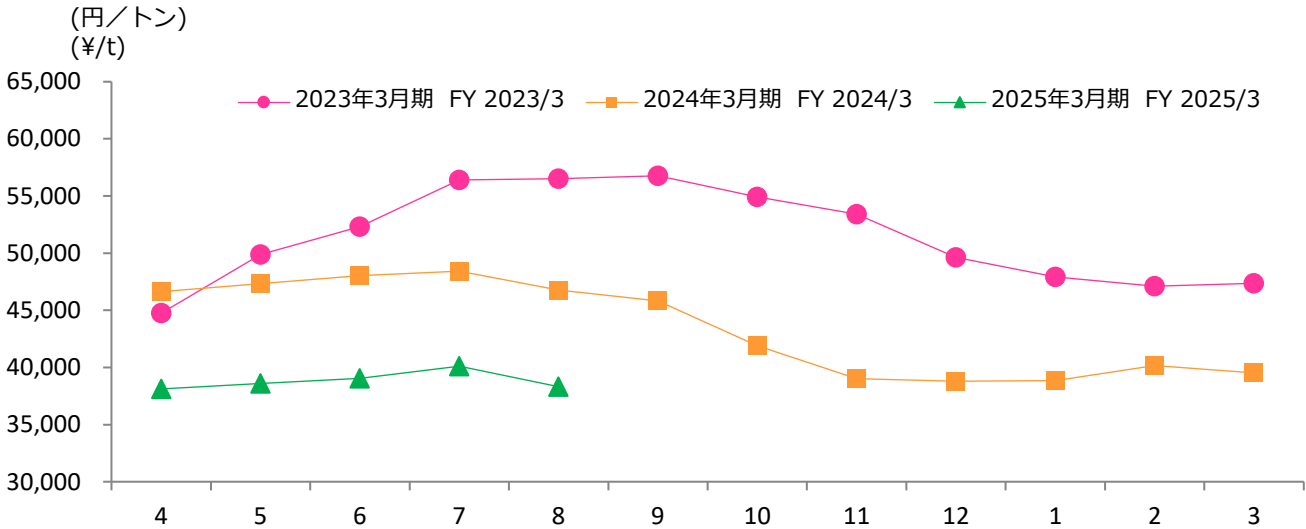


(¥/kg)

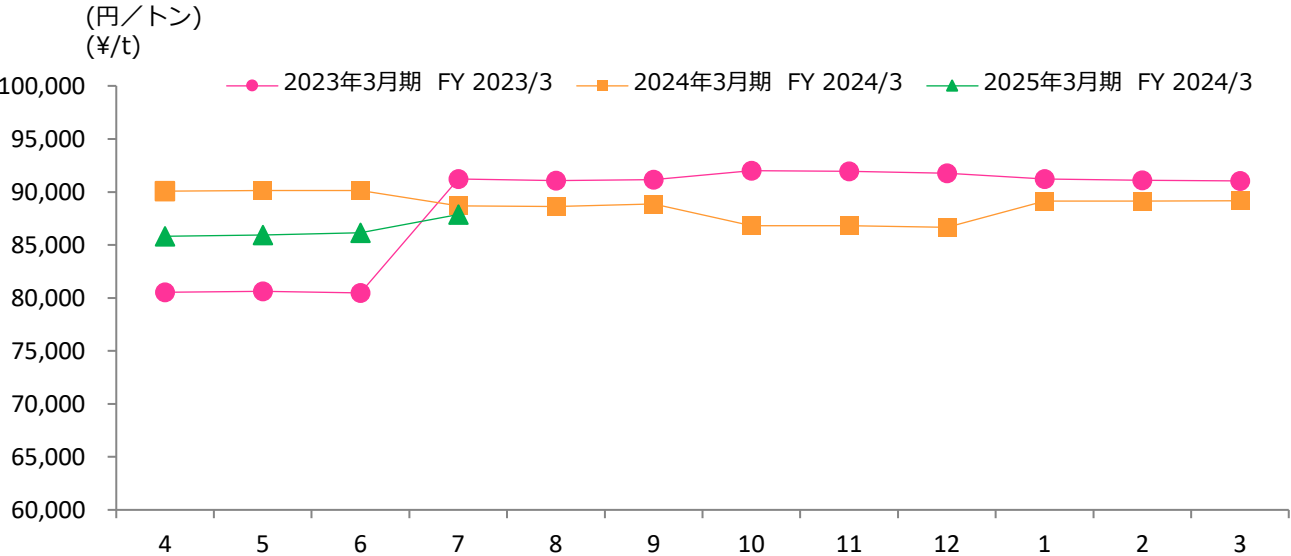
前期差 Year-on-year	前月差 Month-on-month
-43	-45

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



【配合飼料の価格】
Mixed Feed Prices



(円/トン)
(¥/t)

前期差 Year-on-year	前月差 Month-on-month
-8,459	-1,810

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)

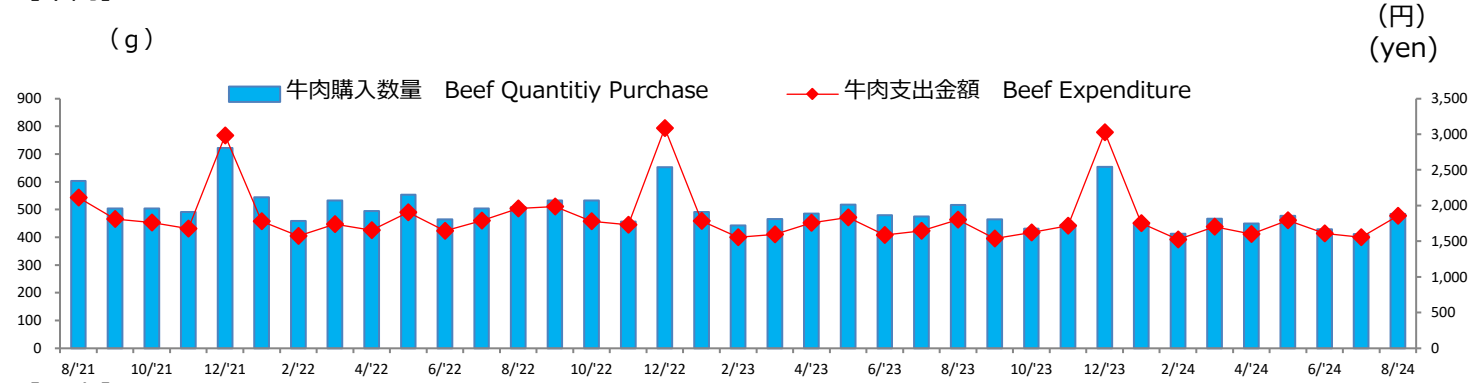
配合飼料の約半分はとうもろこしが占める

(円/トン)
(¥/t)

前期差 Year-on-year	前月差 Month-on-month
-829	1,722

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)

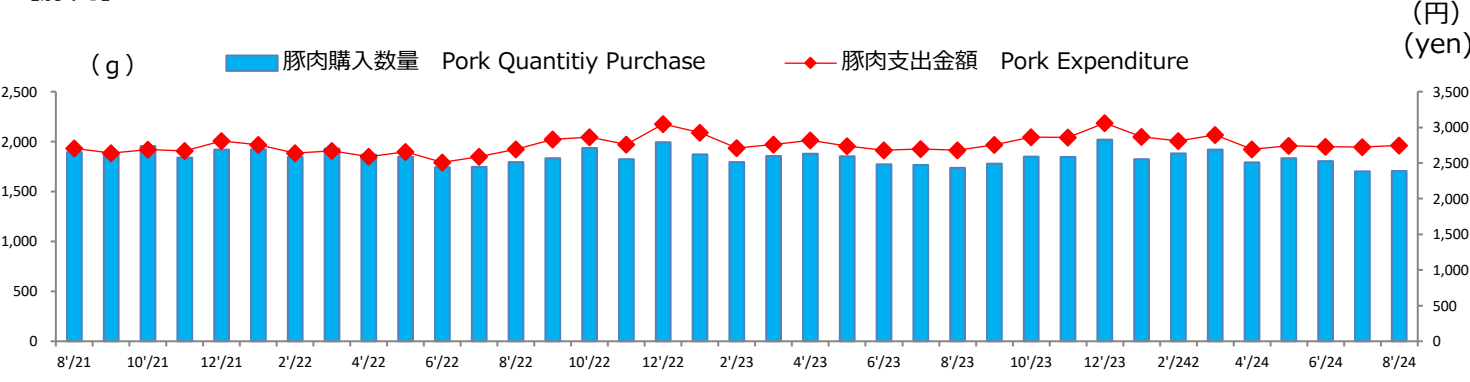
【牛肉】 Beef



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)

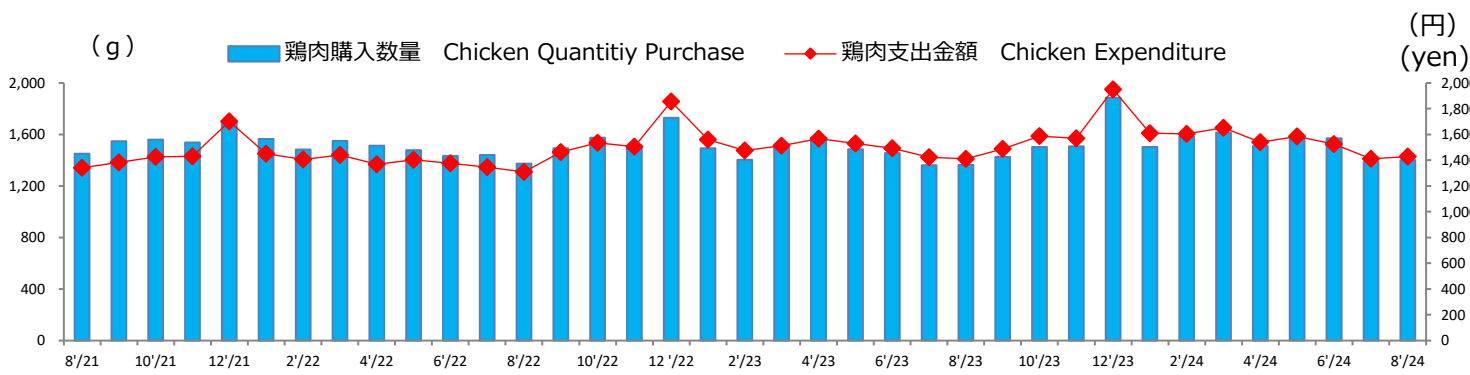
	前期差 Year-on-year	前月差 Month-on-month
購入数量(g) Quantity Purchase(g)	-32	73
支出金額(円) Expenditure (yen)	55	301

【豚肉】 Pork



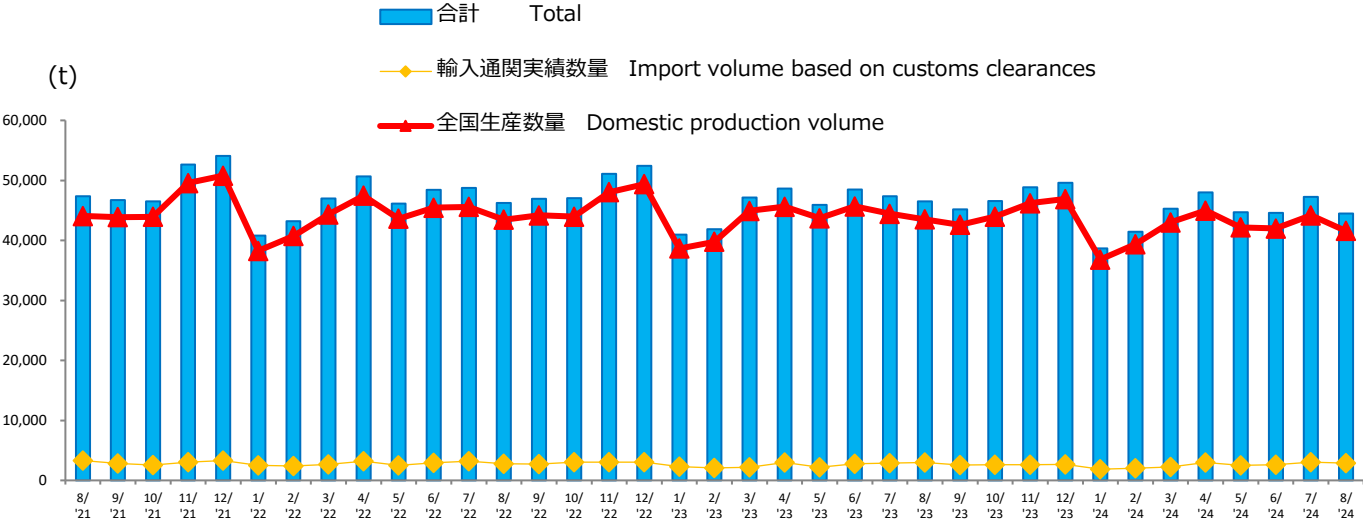
	前期差 Year-on-year	前月差 Month-on-month
購入数量(g) Quantity Purchase(g)	-30	5
支出金額(円) Expenditure (yen)	68	25

【鶏肉】 Chicken



	前期差 Year-on-year	前月差 Month-on-month
購入数量(g) Quantity Purchase(g)	36	14
支出金額(円) Expenditure (yen)	16	16

【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

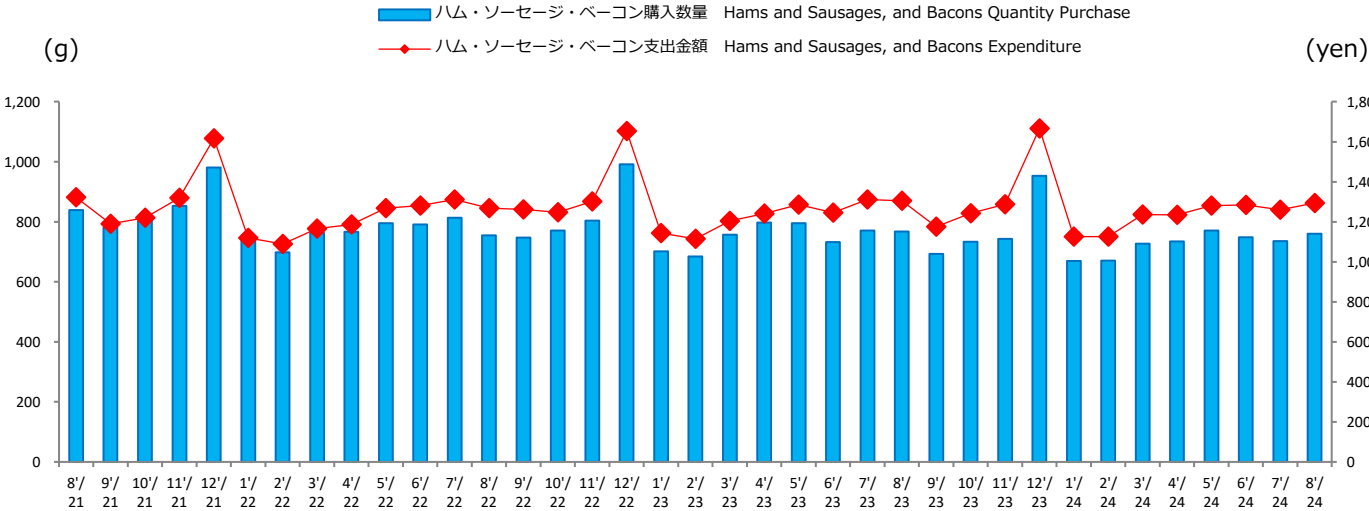


(t)

	前期差 Year-on-year	前月差 Month-on-month
輸入量 Imports	-101	-174
生産数量 Production	-1,916	-2,576

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

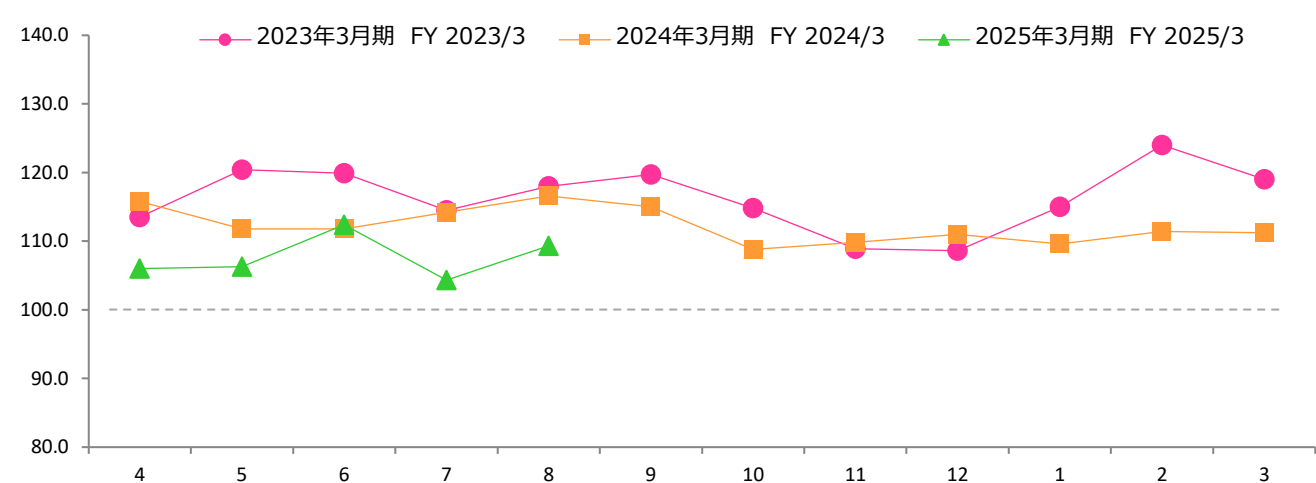


	前期差 Year-on-year	前月差 Month-on-month
購入数量(g) Quantity Purchase(g)	-7	25
支出金額(円) Expenditure (yen)	-12	33

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
(%)



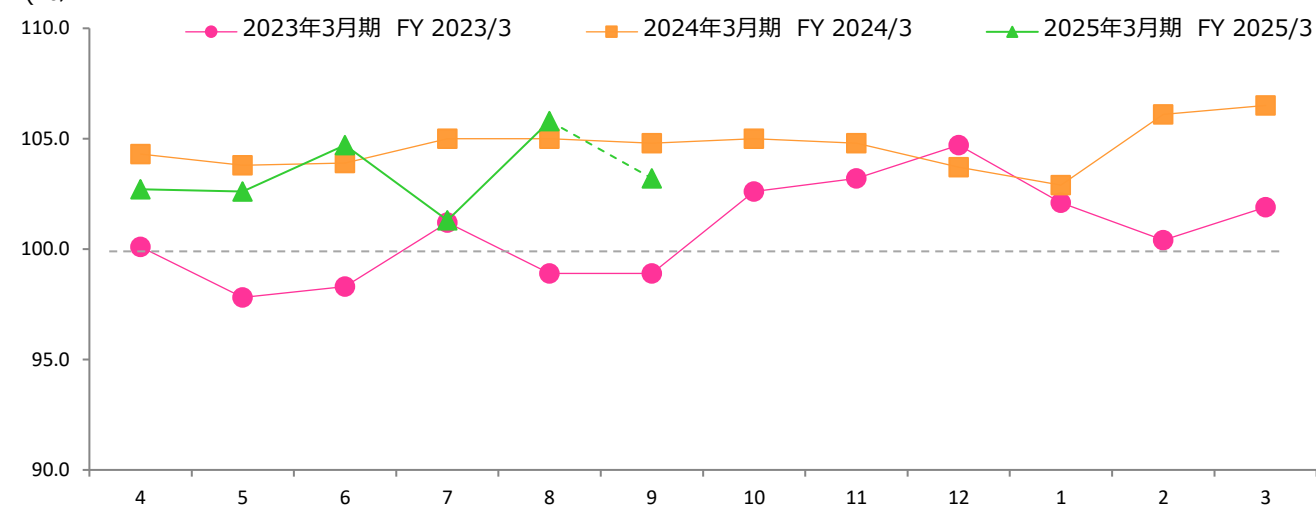
(%)

前期差 Year-on-year	前月差 Month-on-month
-7.3	5.0

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 Year-on-year	前月差 Month-on-month
0.8	4.5

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	600.9	612.1	594.1	631.7	671.3	666.4	*626.8						629.4

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: 食品産業新聞社畜産日報掲載分から単純平均単価(全て単純平均単価)
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	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	1,394	1,410	1,503	1,515	1,533	1,523	1,545	1,588	1,509
FY2025/3	1,618	1,643	1,629	1,683	1,693	1,678	*1,680						1,657

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
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	302.2	262.2
FY2025/3	290.4	288.8	295.0	292.5	276.9								288.7

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: 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
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	308.3	303.9
FY2025/3	298.9	304.6	319.9	321.4	314.3								311.8

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/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	2,048	1,974	1,846	1,852	1,821	1,915	*1,948						1,909

○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 average price) (US \$ /lb)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
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	59.8	58.8
FY2025/3	64.8	66.2	65.6	65.0	64.9								65.3

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: 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
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	93.1	91.6
FY2025/3	99.1	100.3	98.9	100.0	98.9								99.4

シーズンドボーク(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
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	577.9	574.5
FY2025 /3	571.5	614.7	624.6	626.2	623.3								612.1

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	613	714	753	831	764	665	*618						723

○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: 農畜産業振興機構、農林水産省「食鳥市況情報」

Source: Agriculture & Livestock Industries Corporation, MAFF “Survey of Broiler Wholesale price”

(yen/kg)

	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	662	648	636	630	629	641	*665						641

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

出所: 農畜産業振興機構、農林水産省「食鳥市況情報」

Source: Agriculture & Livestock Industries Corporation, 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	374	368	368	370	372	381	*392						372

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(全て単純平均単価)

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	390	410	410	400	390	*365						398

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/Source: Agriculture & Livestock Industries Corporation

(US ¢ /lb)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
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	145.3	130.1
FY2025/3	170.1	182.0	172.1	176.2	189.1								177.9

○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 price) (yen/t)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
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	40,158	39,515	43,441
FY2025/3	38,142	38,616	39,058	40,126	38,316								38,852

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 price) (yen/t)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
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	90,148	88,701	88,638	88,875	86,808	86,825	86,660	89,143	89,150	89,180	88,695
FY2025/3	85,830	85,935	86,150	87,872									86,447

○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 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	98,128	73,754	72,081	69,364	72,450	65,124	70,757	68,440	67,648	70,578	57,914	67,058	853,296
うち生産量/Production	30,207	27,295	28,418	30,671	26,782	28,101	30,423	35,031	31,556	27,314	26,904	28,696	351,398
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	38,362	501,898
推定出回り量/Estimated Marketing Quantity	86,959	72,777	71,721	69,951	70,521	68,377	75,370	79,693	75,694	65,945	61,967	71,058	870,033
うち国産品/Domestic	29,694	26,851	27,806	29,809	26,275	26,740	29,463	34,409	30,833	27,712	26,385	26,259	342,236
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	44,799	527,797
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	124,337	—
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	13,108	—
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	111,229	—

FY 2025/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	94,326	76,782	74,992	81,431	74,782	0	0	0	0	0	0	0	402,313
うち生産量/Production	31,124	28,270	27,418	32,089	25,885								144,786
うち輸入量/Imports	63,202	48,512	47,574	49,342	48,897								257,527
推定出回り量/Estimated Marketing Quantity	81,839	71,007	68,258	75,914	67,761	0	0	0	0	0	0	0	364,779
うち国産品/Domestic	31,618	27,283	27,030	31,955	25,425								143,311
うち輸入品/ Imported	50,221	43,724	41,228	43,959	42,336								221,468
推定期末在庫/Estimated Ending Stock	136,045	141,267	147,229	151,998	158,254	0	0	0	0	0	0	0	—
うち国産品/Domestic	11,835	12,269	11,885	11,271	10,966								—
うち輸入品/Imported	124,210	128,998	135,344	140,727	147,288								—

〇豚肉需給動向/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 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	150,716	1,866,255
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	81,689	901,111
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	149,791	1,835,107
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	81,215	903,441
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	183,361	165,845	154,797	143,095	144,037	131,227	148,567	157,463	148,815	152,310	142,085	151,684	1,823,286
うち生産量/Production	73,791	76,116	73,486	68,264	70,175	69,500	78,467	82,650	81,152	80,283	77,558	77,333	908,775
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	74,351	914,511
推定出回り量/Estimated Marketing Quantity	168,406	146,244	153,933	146,898	146,021	144,899	160,830	165,456	161,570	149,722	148,866	149,436	1,842,281
うち国産品/Domestic	73,309	76,372	73,928	66,926	69,796	68,945	80,065	82,084	79,774	80,748	76,853	75,518	904,318
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	73,918	937,964
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	189,236	－
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	23,117	－
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	166,119	－

FY 2025/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	177,756	170,270	147,970	157,834	149,729	0	0	0	0	0	0	0	803,559
うち生産量/Production	78,976	76,183	66,310	71,679	65,651								358,799
うち輸入量/Imports	98,780	94,087	81,660	86,155	84,078								444,760
推定出回り量/Estimated Marketing Quantity	170,157	152,741	144,121	156,883	145,992	0	0	0	0	0	0	0	769,894
うち国産品/Domestic	79,317	74,520	65,692	73,101	66,675								359,305
うち輸入品/ Imported	90,840	78,221	78,429	83,782	79,317								410,589
推定期末在庫/Estimated Ending Stock	196,729	214,164	217,906	218,756	222,398	0	0	0	0	0	0	0	－
うち国産品/Domestic	22,670	24,239	24,750	23,227	22,108								－
うち輸入品/Imported	174,059	189,925	193,156	195,529	200,290								－

○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 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	190,453	2,244,114
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	142,908	1,679,084
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	189,643	2,247,865
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	140,838	1,684,528
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	186,718	194,566	199,441	180,349	189,658	184,169	193,357	185,982	206,379	194,780	199,947	196,472	2,311,818
うち生産量/Production	139,306	142,849	141,735	133,663	133,703	135,797	145,552	146,801	155,398	140,093	144,552	143,802	1,703,251
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	52,670	608,567
推定出回り量/Estimated Marketing Quantity	193,570	184,771	194,075	182,343	184,543	186,955	195,223	195,829	208,001	186,962	197,971	189,499	2,299,742
うち国産品/Domestic	138,808	141,053	142,480	131,657	132,309	137,746	145,847	145,682	152,720	142,492	140,836	141,802	1,693,432
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	47,697	606,310
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	165,978	–
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	36,868	–
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	129,110	–

FY 2025/3	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
供給量/Supplied Quantity	198,417	200,427	192,542	191,508	186,733	0	0	0	0	0	0	0	969,627
うち生産量/Production	146,411	147,168	143,169	139,730	130,036								706,514
うち輸入量/Imports	52,006	53,259	49,373	51,778	56,697								263,113
推定出回り量/Estimated Marketing Quantity	201,832	195,686	190,072	192,220	182,760	0	0	0	0	0	0	0	962,570
うち国産品/Domestic	147,773	146,411	142,724	140,970	130,410								708,288
うち輸入品/ Imported	54,059	49,275	47,348	51,250	52,350								254,282
推定期末在庫/Estimated Ending Stock	162,563	167,304	169,774	169,062	173,035	0	0	0	0	0	0	0	–
うち国産品/Domestic	35,506	36,263	36,708	35,468	35,094								–
うち輸入品/Imported	127,057	131,041	133,066	133,594	137,941								–

○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 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	4,866	5,633
FY 2025/3	5,055	5,245	5,144	4,698	5,158								5,060

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 average price) (yen/kg)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Average
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	755	766
FY 2025/4	734	748	758	769	724								747

○ハムソーセージ需給動向/Hams and Sausages(P.16)

出所:日本食肉加工協会/Source:Japan Meat Processor Association

FY 2023/3 (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 2024/3 (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	36,829	39,364	43,011	521,788
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	2,260	30,587
合計/Supplied Quantity	48,636	45,898	48,457	47,350	46,512	45,166	46,560	48,847	49,576	38,685	41,417	45,271	552,375

FY 2025/3 (t)

	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total
国内生産量/Production	44,987	42,187	41,979	44,172	41,596								214,921
輸入量/ Imports	2,999	2,525	2,614	3,073	2,899								14,110
合計/Supplied Quantity	47,986	44,712	44,593	47,245	44,495	0	0	0	0	0	0	0	229,031

〇「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」 二人以上の世帯(農林漁家世帯を除く)

Source:Ministry of Internal Affairs and Communications “Family Income and Expendicure Survey”
Two-ormore-person Households(Not including aguricultural,forestry and fisheries households) (9)

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	727	734	771	748	735	760				
牛肉購入数量/Beef	452	413	467	450	477	429	411	484				
豚肉購入数量/Pork	1,823	1,883	1,921	1,791	1,835	1,804	1,702	1,707				
鶏肉購入数量/Chicken	1,501	1,584	1,614	1,509	1,569	1,568	1,385	1,399				

〇「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」 二人以上の世帯(農林漁家世帯を除く)

Source:Ministry of Internal Affairs and Communications “Family Income and Expendicure Survey”
Two-ormore-person Households(Not including aguricultural,forestry and fisheries households) (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	1,236	1,235	1,281	1,284	1,260	1,293				
牛肉 支出金額//Beef	1,752	1,522	1,704	1,602	1,795	1,610	1,554	1,855				
豚肉 支出金額/Pork	2,866	2,808	2,893	2,695	2,742	2,727	2,724	2,749				
鶏肉 支出金額/Chicken	1,608	1,605	1,650	1,539	1,585	1,524	1,411	1,427				

○ 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 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	111.2	112.3
FY 2025/3	106.0	106.3	112.4	104.3	109.3								107.7

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 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	106.5	104.7
FY 2025/3	102.7	102.6	104.7	101.3	105.8	*103.2							103.4

〒141-6013 東京都品川区大崎2-1-1
ThinkPark Tower
日本ハム株式会社 広報IR部
電話：03-4555-8024
mail: nhfoods.ir@nipponham.co.jp

Public & Investor Relations Department
NH Foods Ltd.
ThinkPark Tower
2-1-1 Osaki, Shinagawa-ku, Tokyo 141-6013
Tel: +81-3-4555-8024
mail: nhfoods.ir@nipponham.co.jp



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