

2024年12月度 市場動向資料集

December 2024 Market Trends

日本八ム株式会社
NH Foods Ltd.
January 27, 2025



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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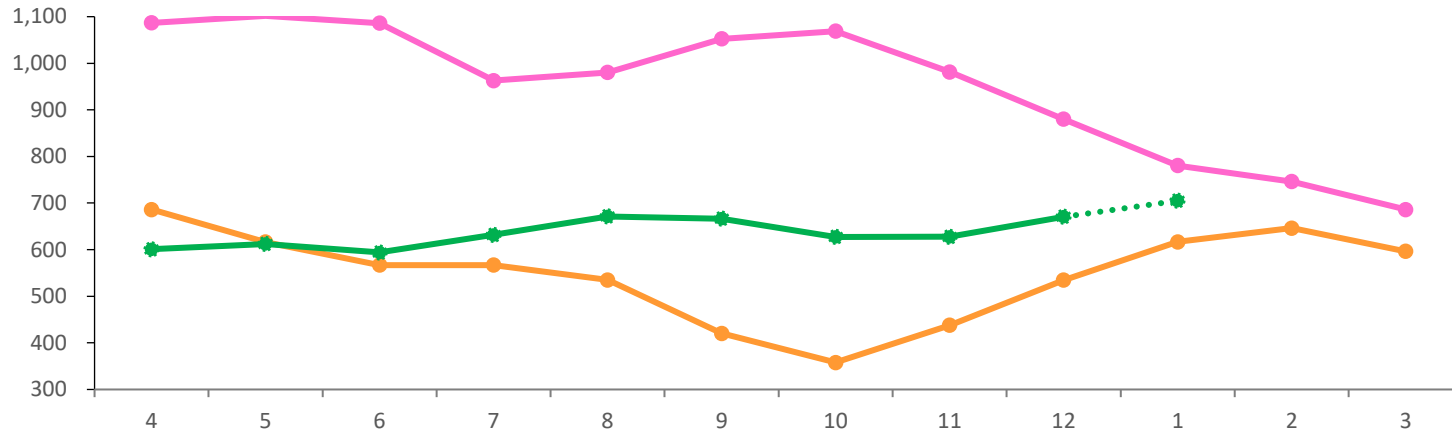
【豪州産 若齢牛価格(生産者販売価格) (現地価格)】

Eastern Young Cattle Indicator (EYCI)

(豪セント/kg)
(A ¢/kg)

FY2023/3 FY2024/3 FY2025/3

※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
135.7	42.6

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

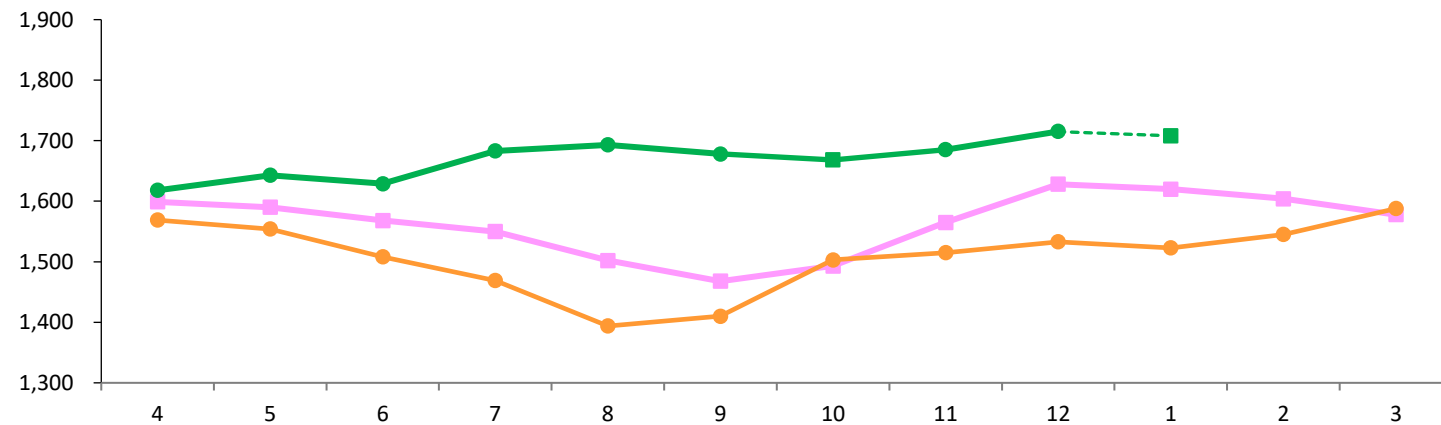
【豪州産チルドビーフ ショートグレインフルセット価格 (日本国内価格)】

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

(¥/kg)

FY2023/3 FY2024/3 FY2025/3

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



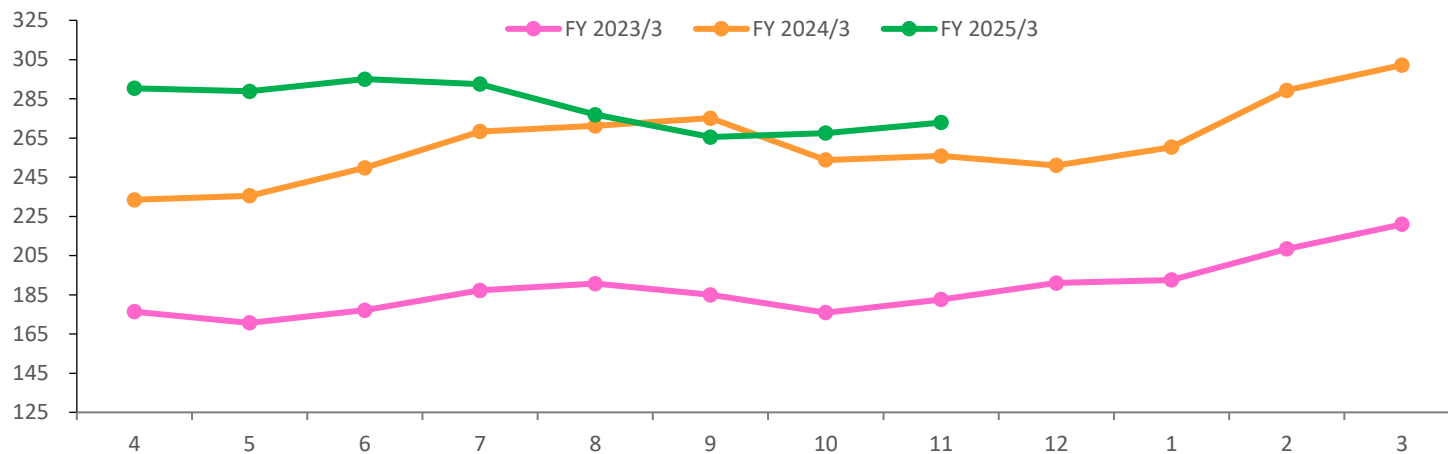
ショートグレイン: 穀物肥育期間 100日以上
Short Grain Fed: Grain Fed period 100 days or more
フルセット: セット販売(基本12部位) ⇔ パーツ販売
Full Set: Set Price of primal 12 items ⇔ Single item Sales

(¥/kg)

前期差 Year-on-year	前月差 Month-on-month
182.0	30.0

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

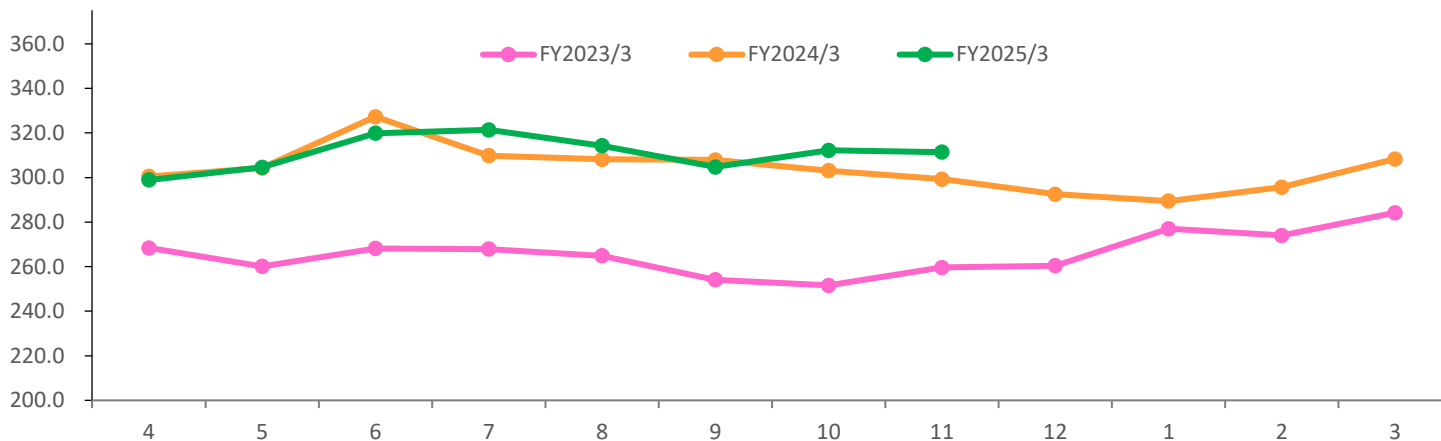


(US \$/cwt)

前期差 Year-on-year	前月差 Month-on-month
17.1	5.4

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)

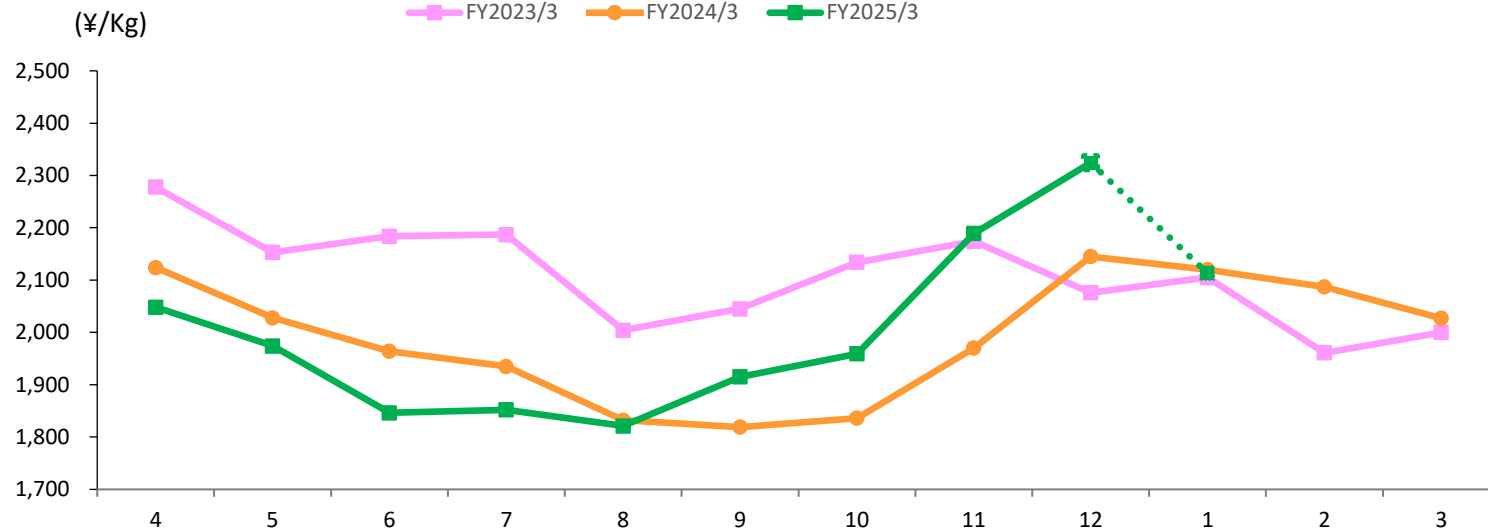
前期差 Year-on-year	前月差 Month-on-month
12.1	-0.8

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

【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

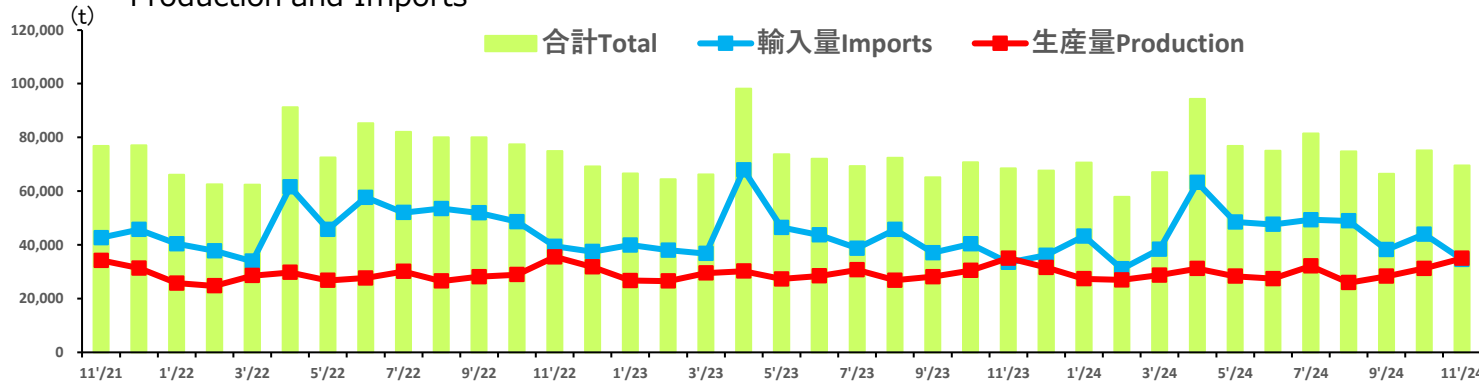


前期差 Year-on-year		前月差 Month-on-month	
179.0		135.0	

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

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

【生産量と輸入量】
Production and Imports

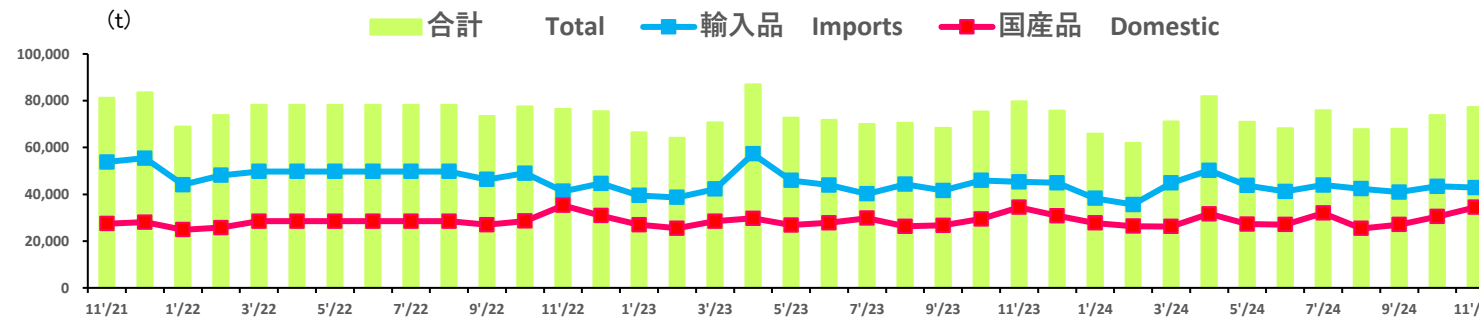


グラフ資料出所：農畜産業振興機構
Source: Agriculture & Livestock Industries Corporation

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	1,165	103%	-9,359	79%
生産量 Production	-46	100%	3,774	112%

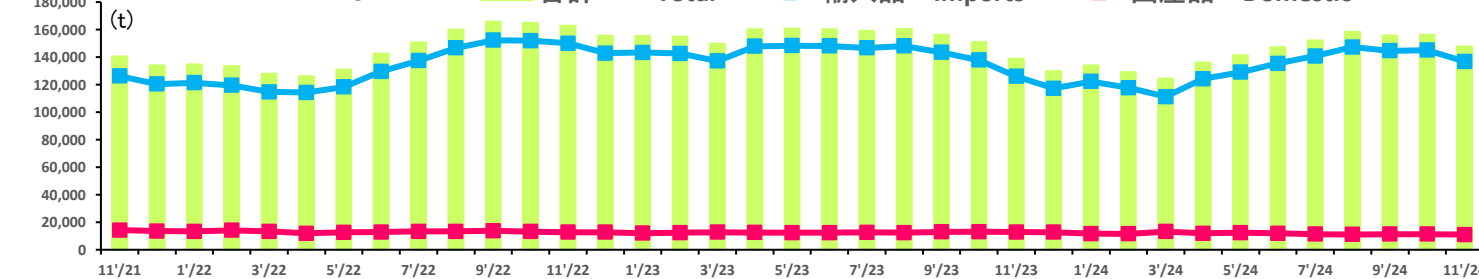
【推定出回り量】
Estimated Marketing Quantity



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

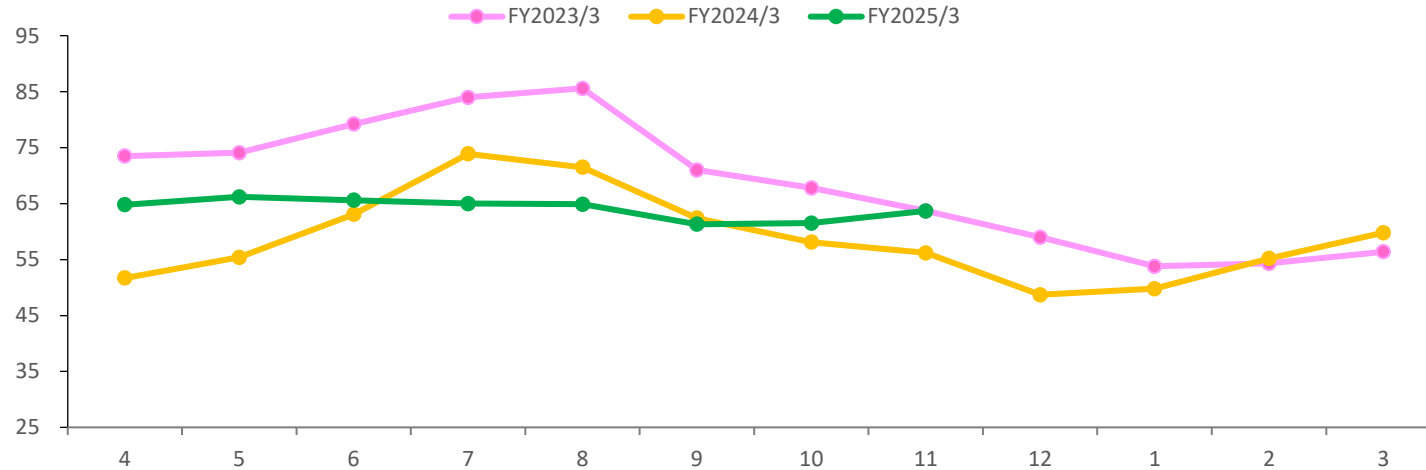
	前期差 Year-on-year	前期比 Rate of change	前月差 Month-on-Month	前月比 Rate of change
輸入量 Imports	-2,423	95%	-544	99%
国産品 Domestic	8	100%	3,948	113%

【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	10,815	109%	- 8,287	94%
国産品 Domestic	-1,938	85%	-363	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)

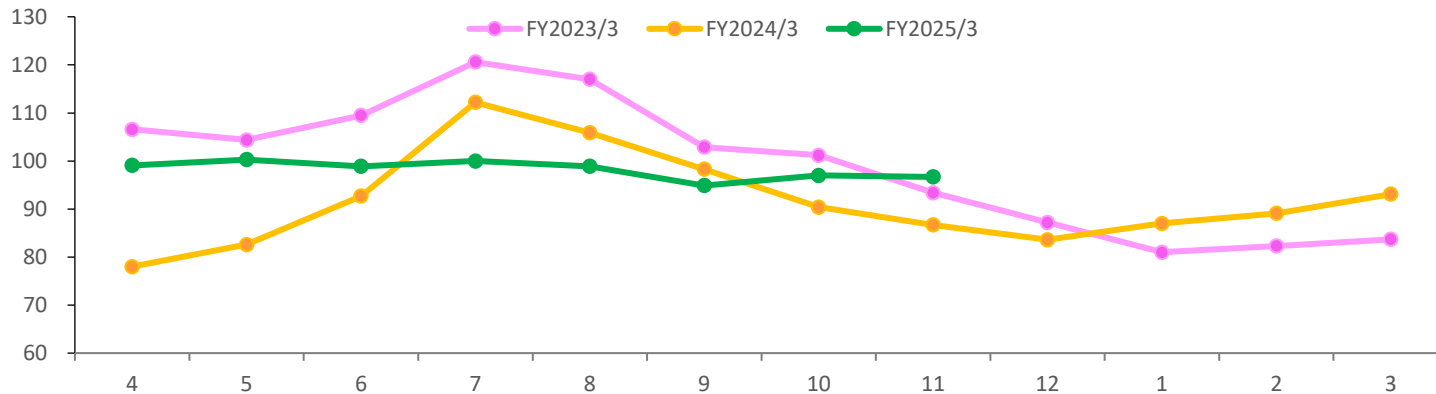


(セント/ポンド)
(US ¢/lb)

前期差 Year-on-year	前月差 Month-on-Month
7.5	2.2

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)

【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)

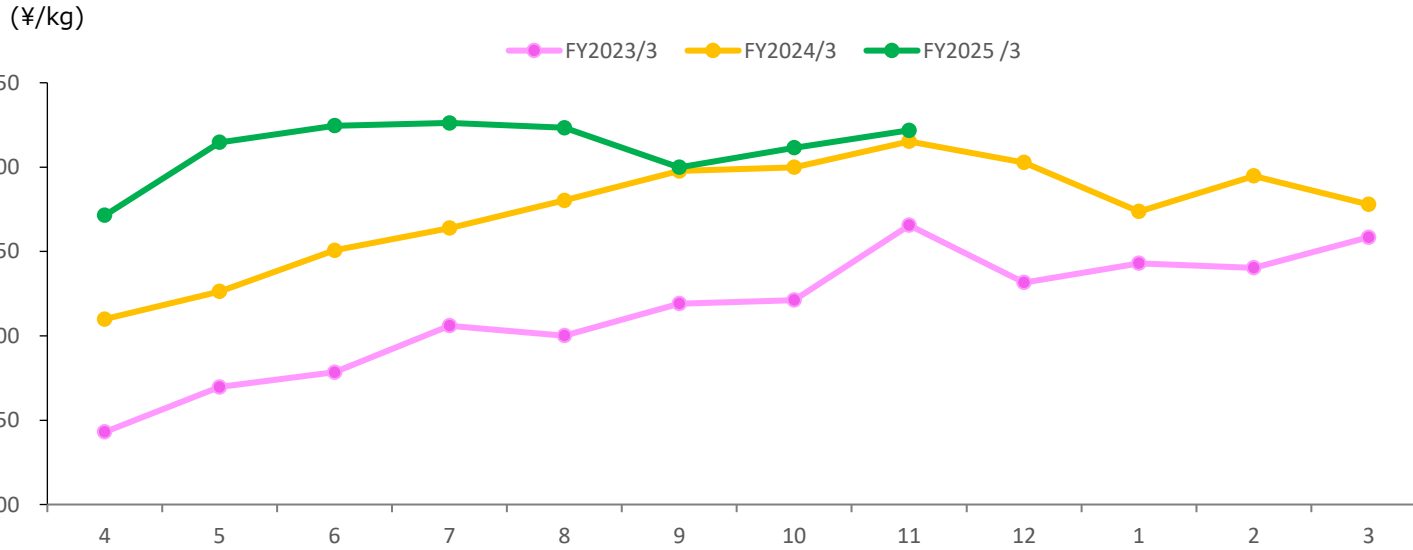


(ドル/100ポンド)
(US \$/cwt)

10前期差 Year-on-year	前月差 Month-on-Month
10.0	-0.3

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)

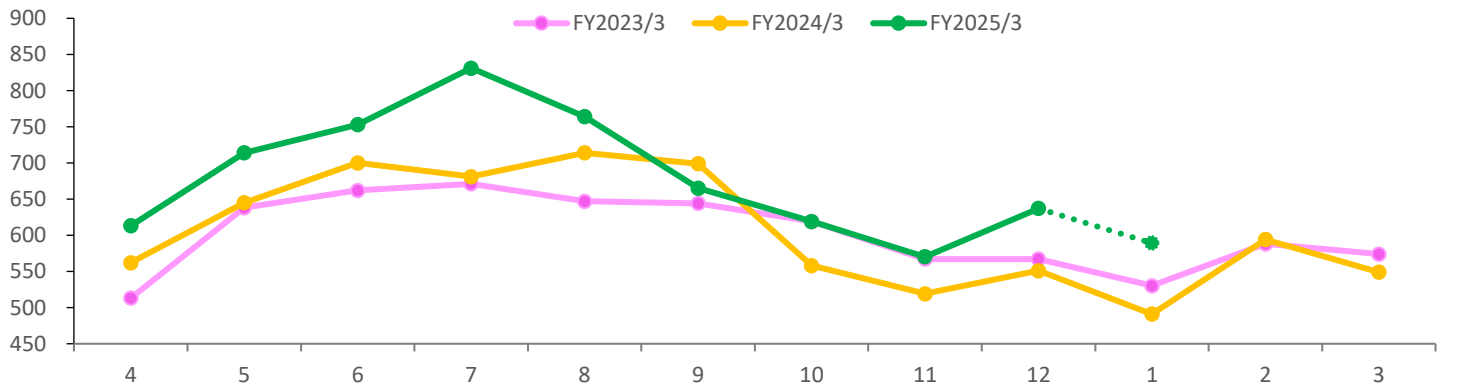


シーズンドポーク (豚肉調整品):主にソーセージ等の加工原料用
Mainly used for sausages

前期差 Year-on-year		前月差 Month-on-month	
6.5		10.3	

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)



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

上物：等級(極上、上、中、並、等外)

前期差 Year-on-year		前月差 Month-on-month	
86.0		67.0	

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

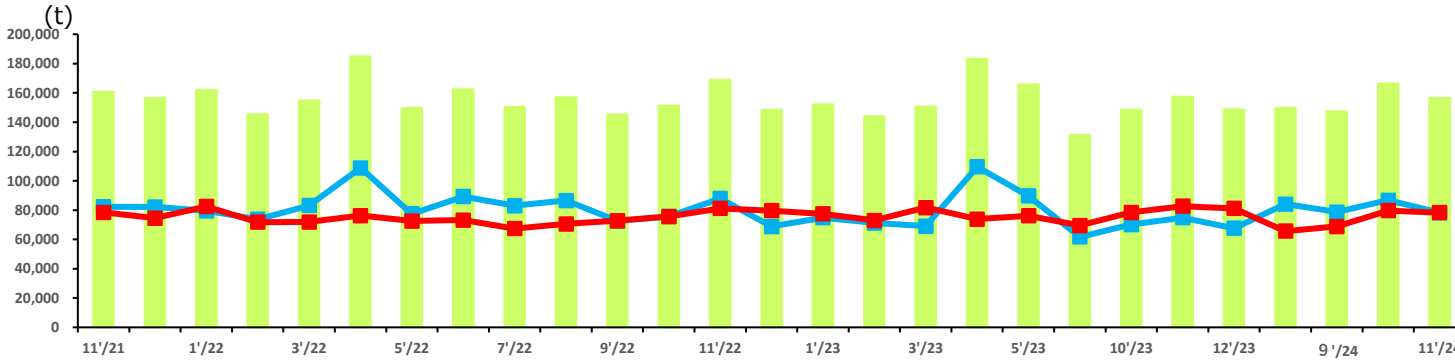
豚肉需給量推移 / Pork Supply and Demand Trends

【生産量と輸入量】
Production and Imports

合計 Total 輸入量 生産量 Production

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

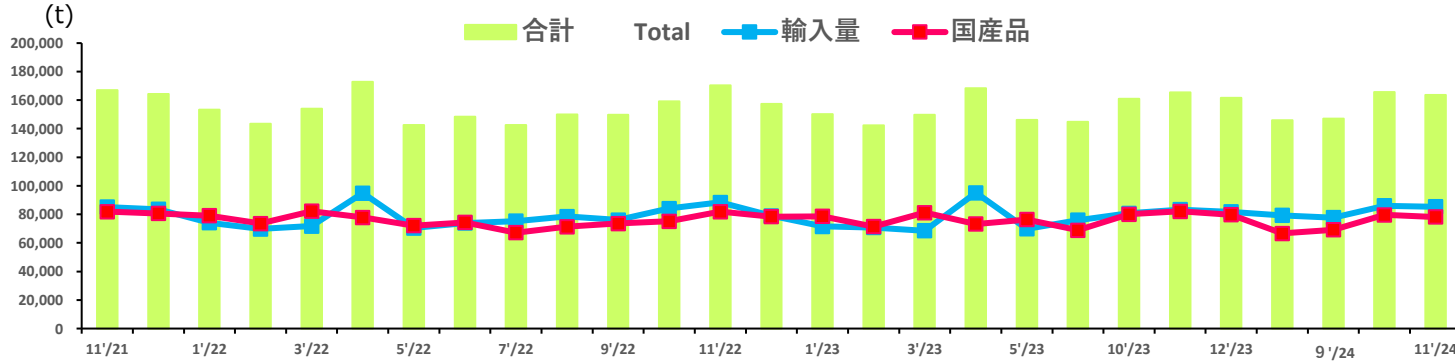


	前期差 Year-on-year	前期比 Rate of change	前月差 Month-on-Month	前月比 Rate of change
輸入量 Imports	3,403	105%	-8,526	90%
生産量 Production	-4,289	95%	-1,264	98%

【推定出回り量】
Estimated Marketing Quantity

合計 Total 輸入量 国産品

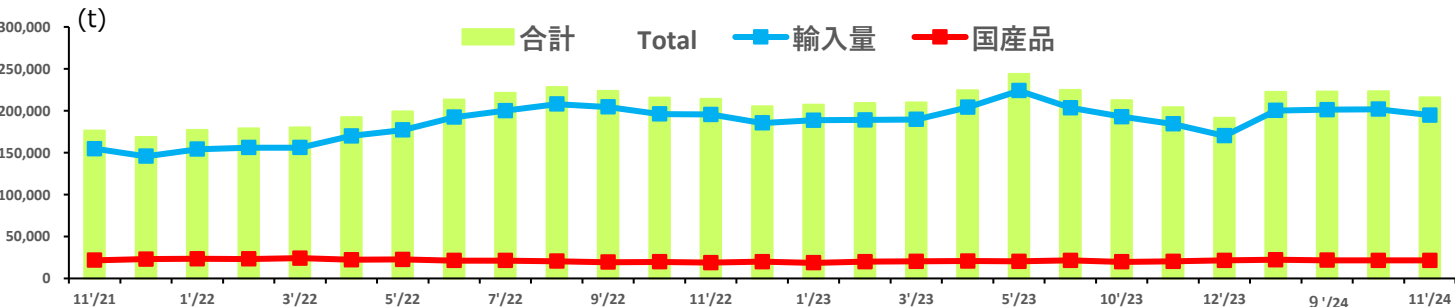
推定出回り量：推定期首在庫+生産量+輸入量-輸出量-推定期末在庫
Estimated marketing quantity: Estimated beginning stock stock + Production+Imports-Exports-Estimated ending stock



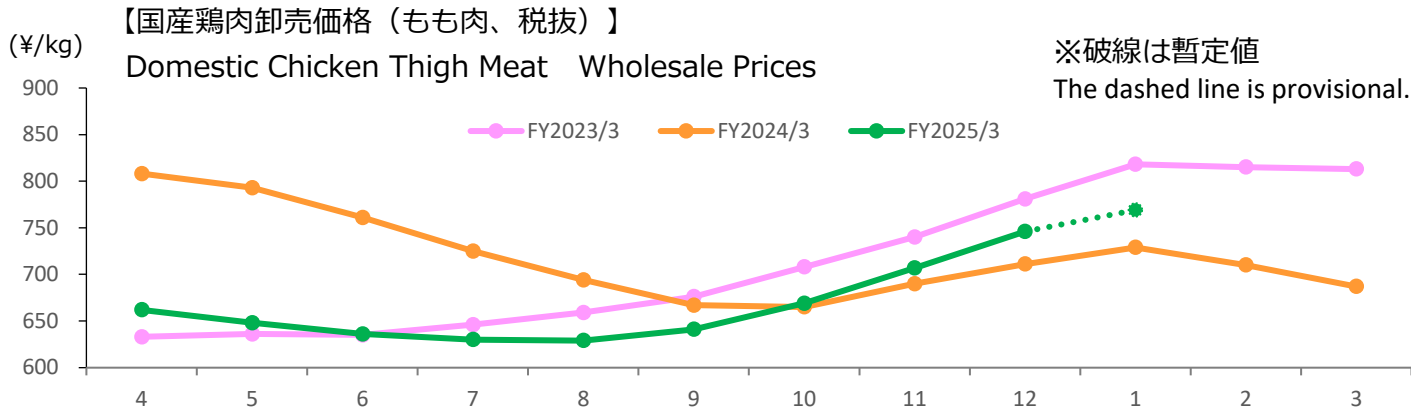
	前期差 Year-on-year	前期比 Rate of change	前月差 Month-on-Month	前月比 Rate of change
輸入量 Imports	1,969	102%	-676	99%
国産品 Domestic	-3,835	95%	-1,450	98%

【推定期末在庫】
Estimated Ending Stock

合計 Total 輸入量 国産品



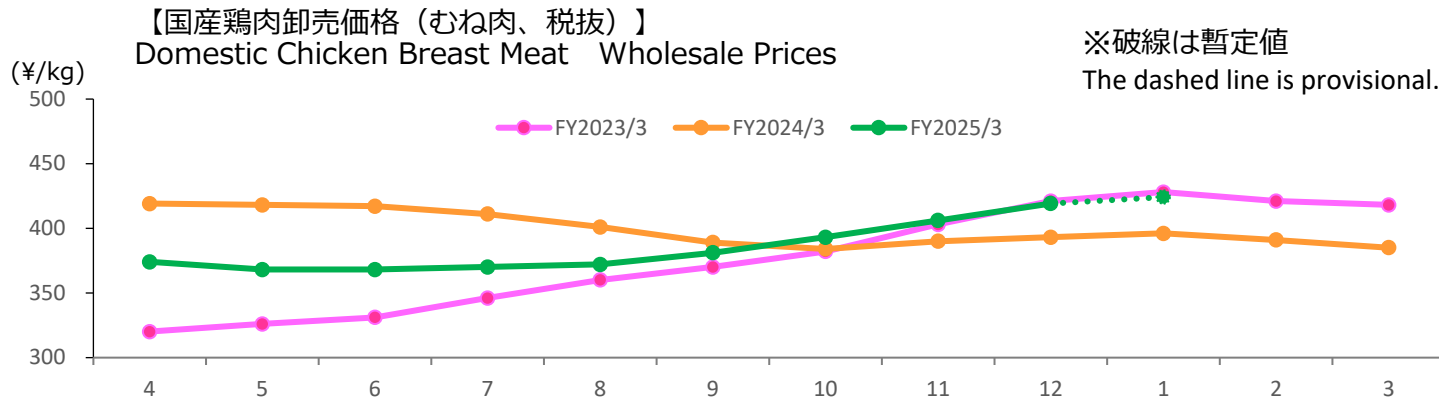
	前期差 Year-on-year	前期比 Rate of change	前月差 Month-on-Month	前月比 Rate of change
輸入量 Imports	10,544	106%	-7,125	96%
国産品 Domestic	1,235	106%	5	100%



前期差 Year-on-year	前月差 Month-on-monh
35.0	39.0

(¥/kg)

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"



前期差 Year-on-year	前月差 Month-on-monh
26.0	13.0

(¥/kg)

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"

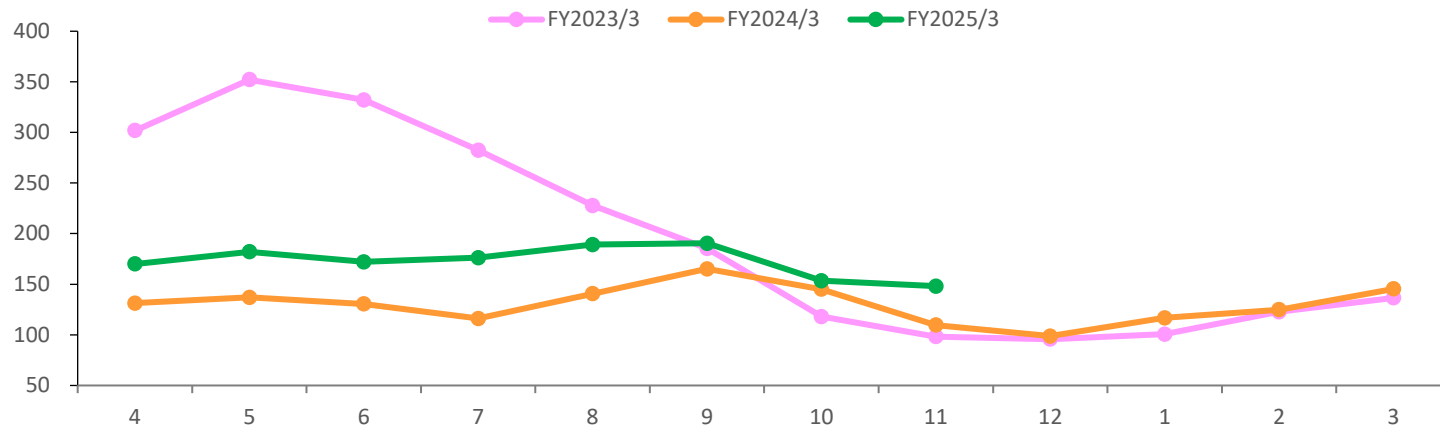


前期差 Year-on-year	前月差 Month-on-month
-45.0	0.0

(¥/kg)

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)

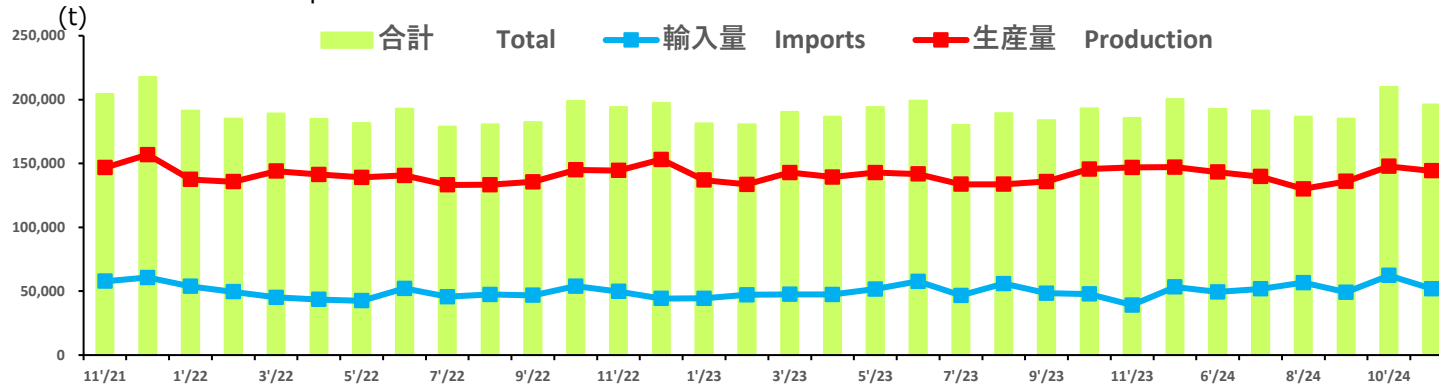


(セント/ポンド) (US ¢/lb)	
前期差 Year-on-year	前月差 Month-on-month
38.5	-5.4

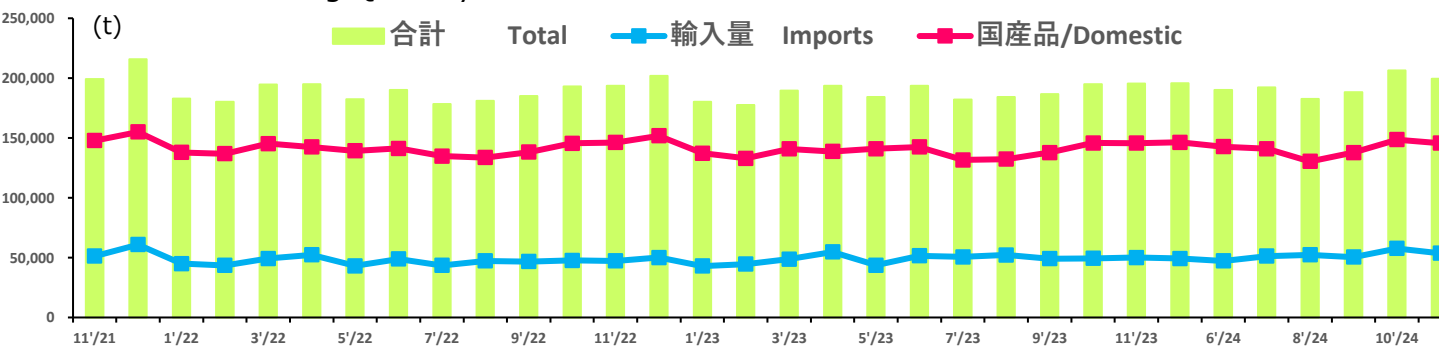
グラフ資料出所：農畜産業振興機構
 Source: Agriculture & Livestock Industries Corporation

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

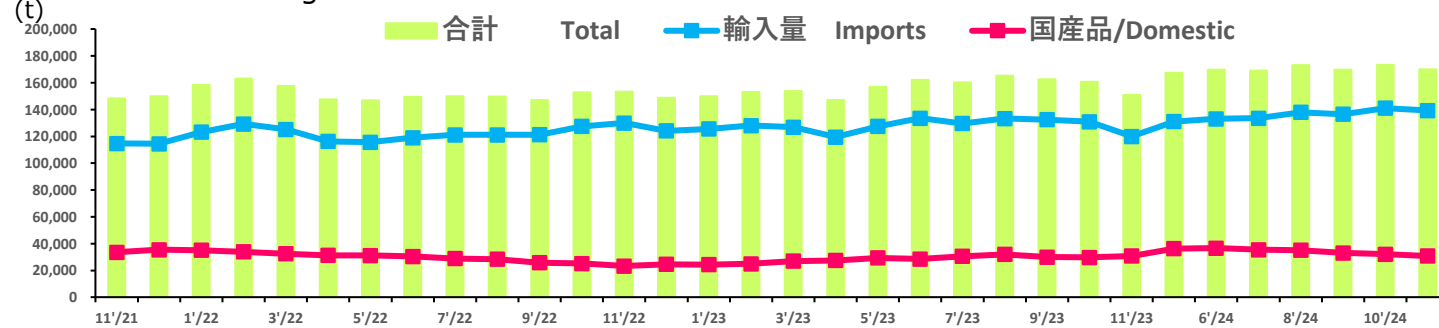
【生産量と輸入量】
Production and Imports



【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: 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.

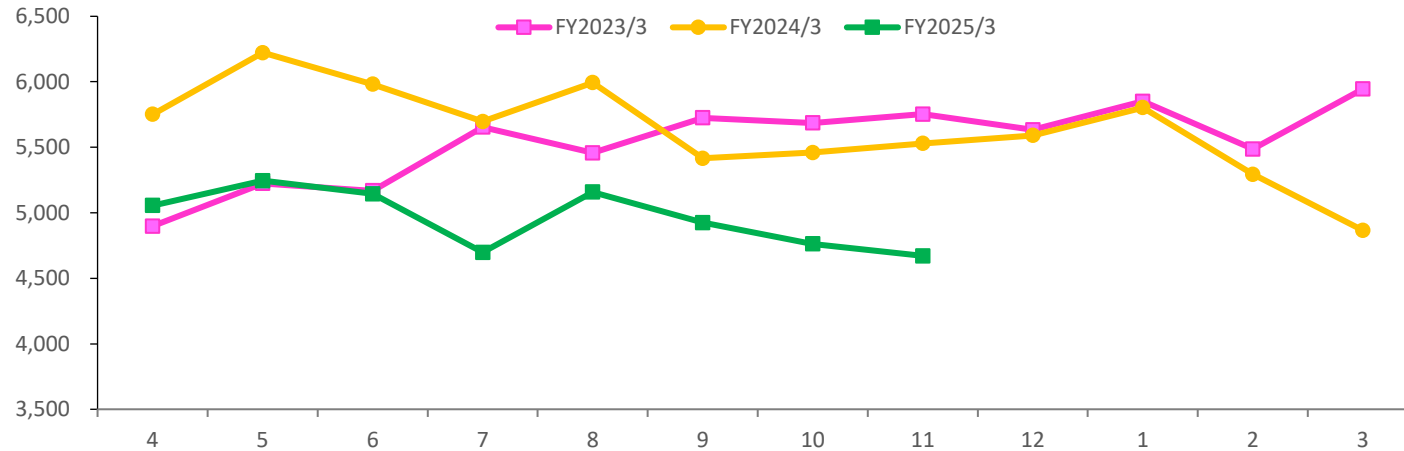
	前期差 Year-on-year	前期比 Rate of change	前月差 Month-on-Month	前月比 Rate of change
輸入量 Imports	12,786	133%	-10,356	83%
生産量 Production	-2,566	98%	-3,446	98%

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 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	3,609	107%	-3,973	93%
国産品 Domestic	-25	100%	-2,976	98%

	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	19,363	116%	-1,789	99%
国産品 Domestic	-93	100%	-1,422	96%

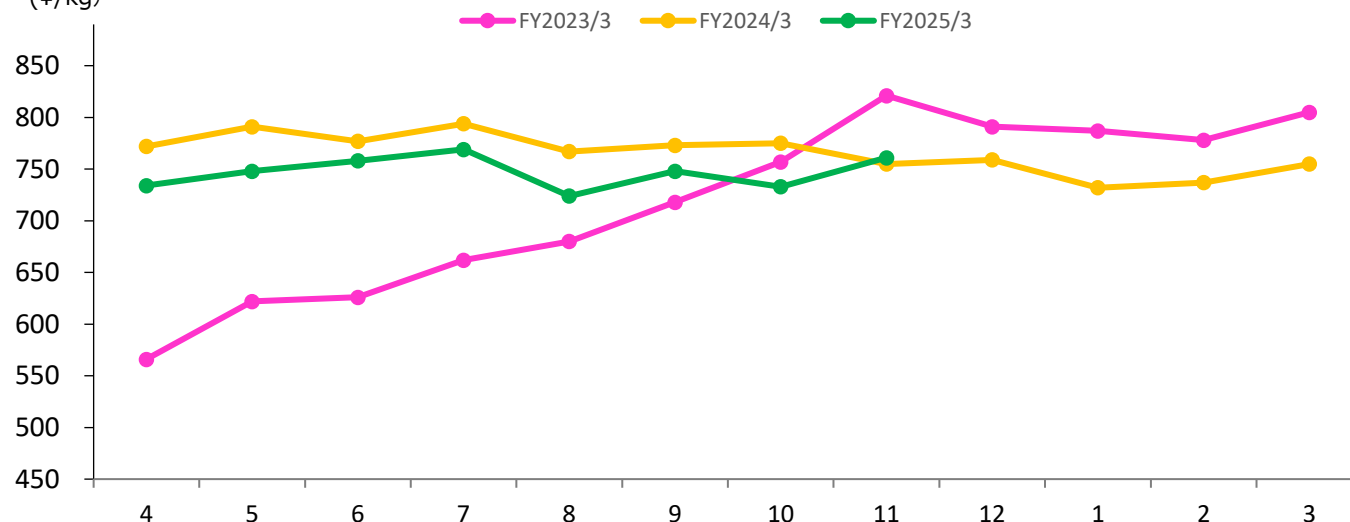
【天然腸輸入価格】 ※主に羊腸(豚腸・牛腸等も含む)
 Natural Casing Import Price (CIF) Mainly seep casing including pork & beef casing
 (¥/kg)



(¥/kg)	
前期差 Year-on-year	前月差 Month-on-month
-858	-92

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)

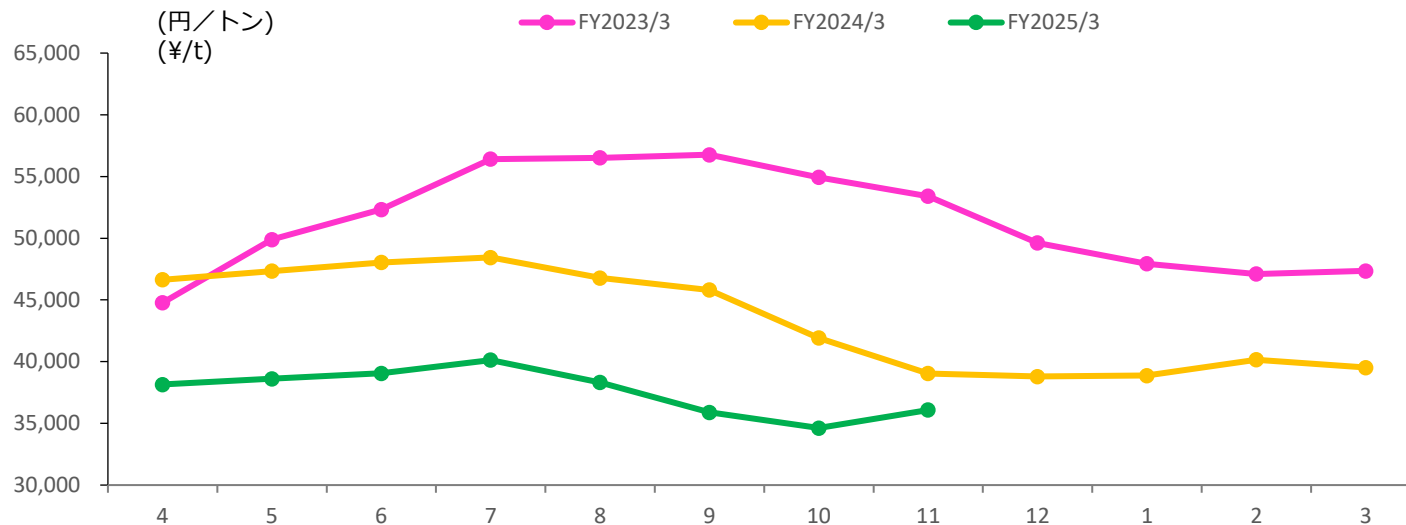


(¥/kg)	
前期差 Year-on-year	前月差 Month-on-month
6	28

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

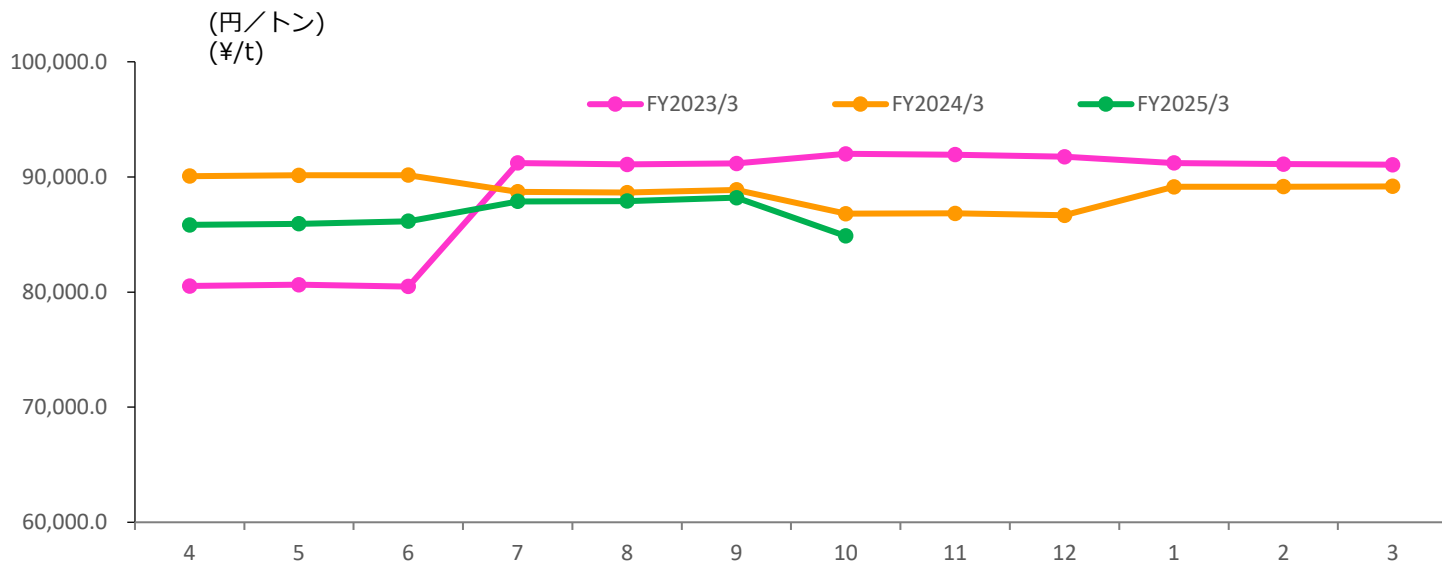


(円/トン) (¥/t)	
前期差 Year-on-year	前月差 Month-on-month
-2,956	1,457

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

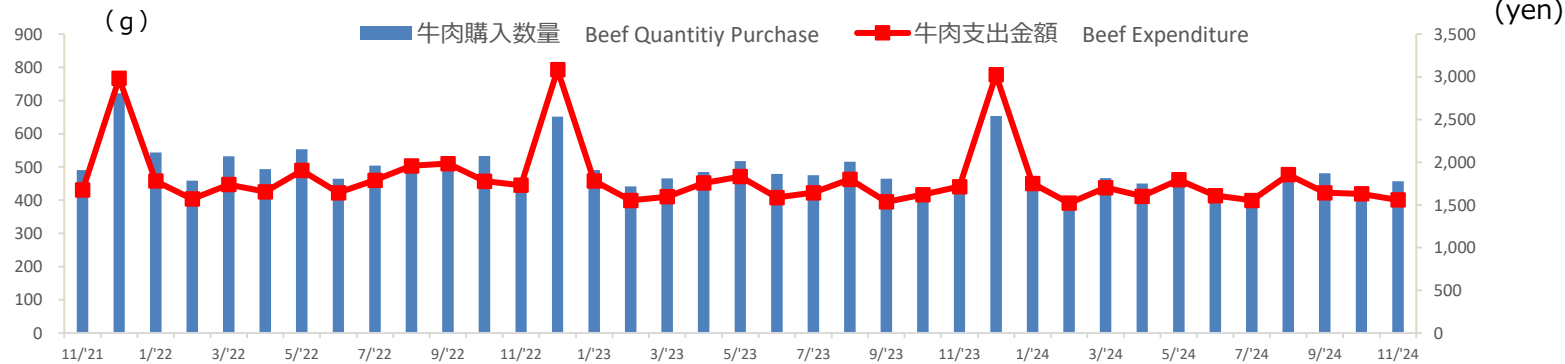


配合飼料の約半分はとうもろこしが占める

(円/トン) (¥/t)	
前期差 Year-on-year	前月差 Month-on-month
-1,943	-3,328

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)

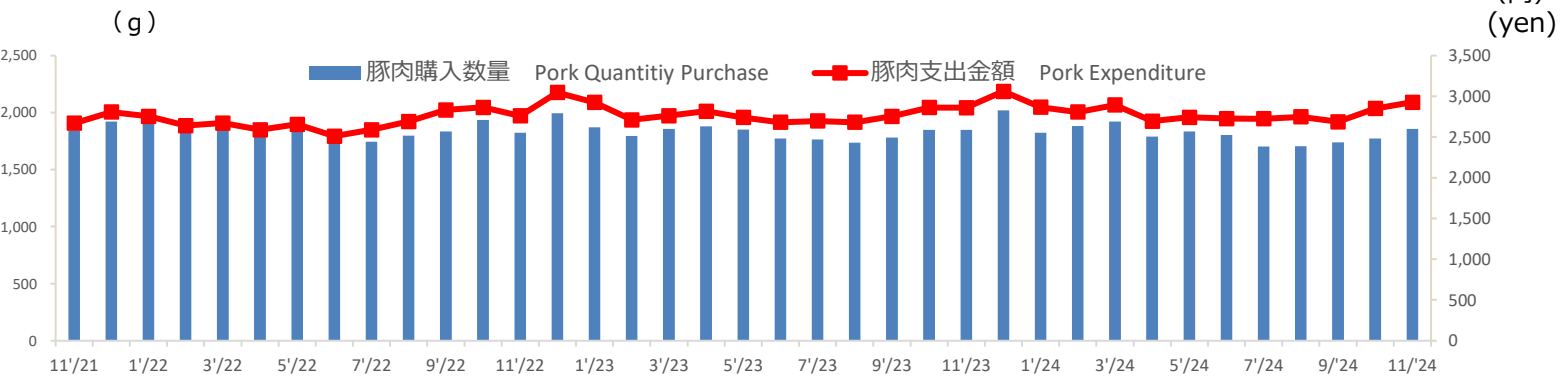
【牛肉】 Beef



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)

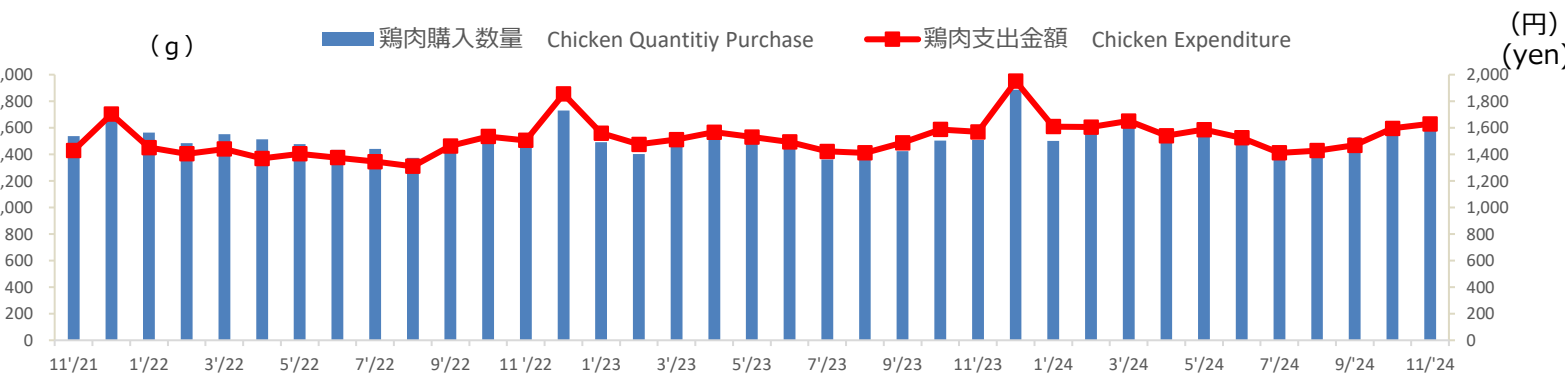
	前期差 Year-on-year	前月差 Month-on-month
購入数量(g) Quantity Purchase(g)	12	35
支出金額(円) Expenditure (yen)	-155	-71

【豚肉】 Pork



	前期差 Year-on-year	前月差 Month-on-month
購入数量(g) Quantity Purchase(g)	8	82
支出金額(円) Expenditure (yen)	67	77

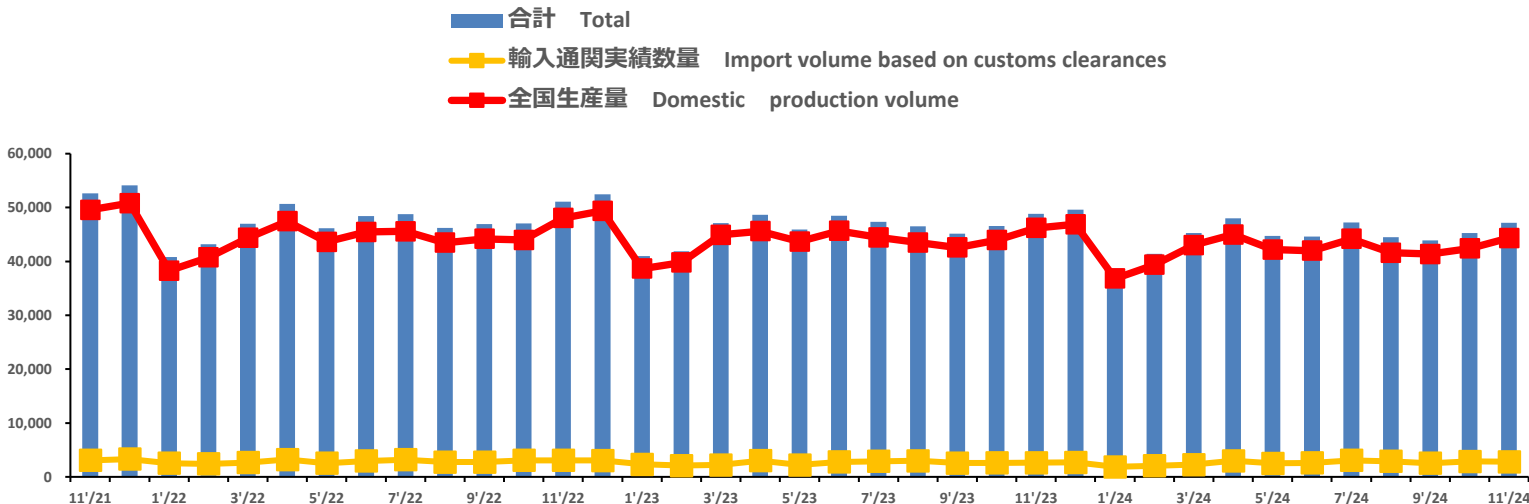
【鶏肉】 Chicken



	前期差 Year-on-year	前月差 Month-on-month
購入数量(g) Quantity Purchase(g)	78	2
支出金額(円) Expenditure (yen)	60	34

【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

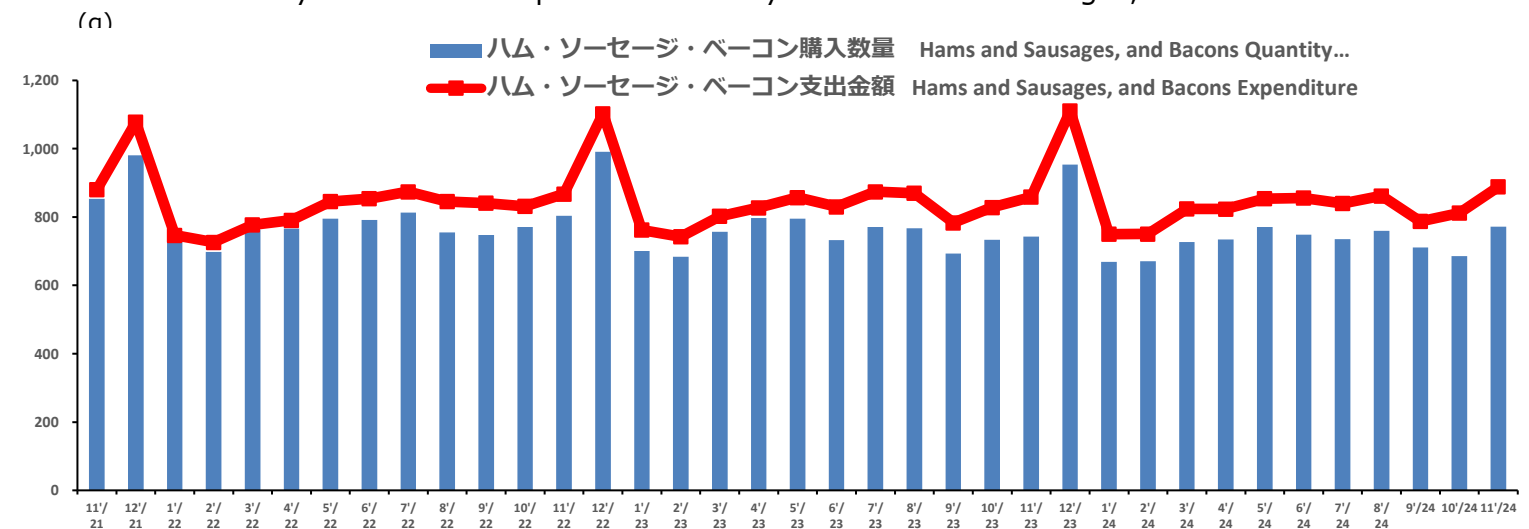


	前期差 Year-on-year	前月差 Month-on-month
輸入量 Imports	174	-56
生産数量 Production	-1,876	1,928

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



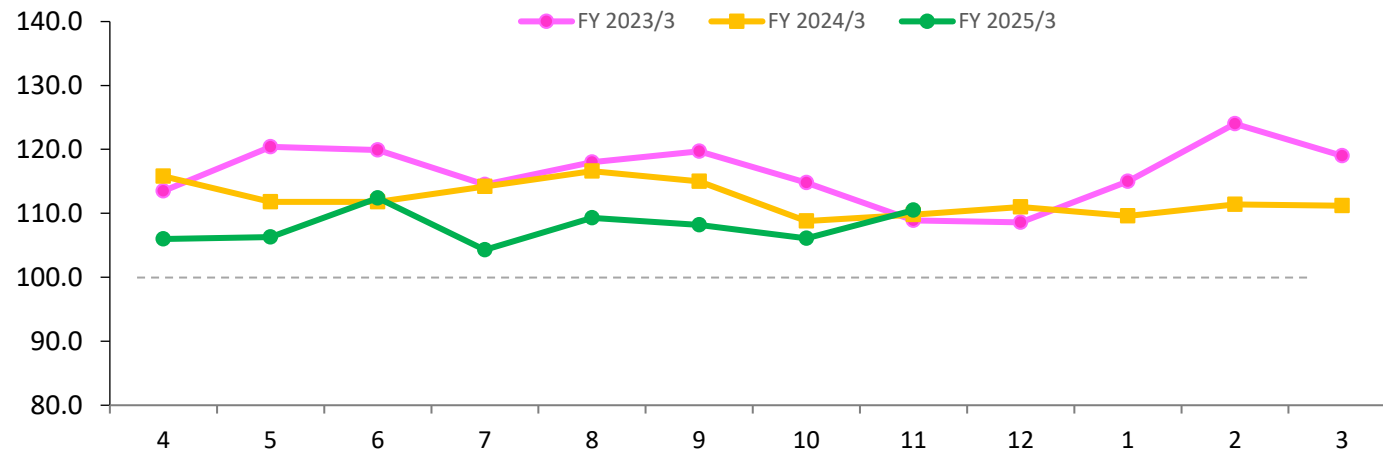
	前期差 Year-on-year	前月差 Month-on-month
購入数量(g) Quantity Purchase(g)	29	86
支出金額(円) Expenditure (yen)	45	115

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

(%)



(%)

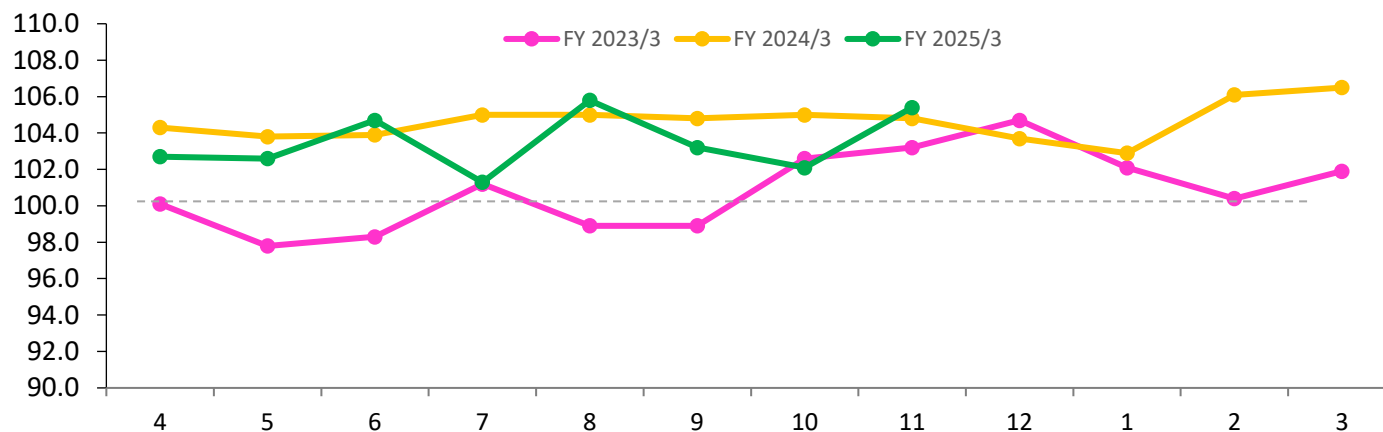
前期差 Year-on-year	前月差 Month-on-month
0.7	4.4

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

(%)



(%)

前期差 Year-on-year	前月差 Month-on-month
0.6	3.3

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)

	4	5	6	7	8	9	10	11	12	1	2	3	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	627.4	627.6	670.2	* 704.8			633.5

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)

	4	5	6	7	8	9	10	11	12	1	2	3	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	1,668	1,685	1,715	* 1,708			1,668

米国産 肥育素牛(生産者販売価格)(現地価格)

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

(US\$/cwt)

	4	5	6	7	8	9	10	11	12	1	2	3	Average
FY 2023/3	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
FY 2024/3	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
FY 2025/3	290.4	288.8	295.0	292.5	276.9	265.5	267.5	272.9					281.2

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)

	4	5	6	7	8	9	10	11	12	1	2	3	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	304.7	312.2	311.4					310.9

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)

	4	5	6	7	8	9	10	11	12	1	2	3	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	1,959	2,189	2,324	* 2,113			1,992

○豚肉相場/Pork Prices(

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)

	4	5	6	7	8	9	10	11	12	1	2	3	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	46.5
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	69.7
FY2025/3	64.8	66.2	65.6	65.0	64.9	61.3	61.5	63.7					64.1

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)

	4	5	6	7	8	9	10	11	12	1	2	3	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	94.9	97.0	96.7					98.2

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)

	4	5	6	7	8	9	10	11	12	1	2	3	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	599.9	611.5	621.8					611.7

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 Inclu

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

	4	5	6	7	8	9	10	11	12	1	2	3	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	619	570	637	* 589			685

○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"

	4	5	6	7	8	9	10	11	12	1	2	3	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	669	707	746	* 768			663

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"

	4	5	6	7	8	9	10	11	12	1	2	3	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	393	406	419	* 424			384

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

出所:食品産業新聞社畜産日報掲載分から単純平均単価

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

	4	5	6	7	8	9	10	11	12	1	2	3	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	371	390	390	* 390			393

米国 むね肉価格(ボンレス)(現地価格)

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

	4	5	6	7	8	9	10	11	12	1	2	3	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	190.5	153.5	148.1					177.9

○飼料価格相場/Market Trends in Grain Feed Prices (P.13)

とうもろこしの輸入価格(円/トン)/Imported Corn Prices (P14)

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)

	4	5	6	7	8	9	10	11	12	1	2	3	Average
FY2023/3	44,770	49,888	52,330	56,414	56,519	56,763	54,931	53,401	49,618	47,934	47,111	47,357	51,420
FY2024/3	46,636	47,332	48,038	48,435	46,775	45,813	41,912	39,035	38,799	38,866	40,158	39,515	43,443
FY2025/3	38,142	38,616	39,058	40,126	38,316	35,888	34,622	36,079					37,606

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)

	4	5	6	7	8	9	10	11	12	1	2	3	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	87,895	88,193	84,865						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	4	5	6	7	8	9	10	11	12	1	2	3	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	4	5	6	7	8	9	10	11	12	1	2	3	Total
供給量/Supplied Quantity	98,128	73,754	72,081	69,364	72,450	65,124	70,757	68,439	67,648	70,578	57,914	67,058	853,295
うち生産量/Production	30,207	27,295	28,418	30,671	26,782	28,101	30,423	35,030	31,556	27,314	26,904	28,696	351,397
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	4	5	6	7	8	9	10	11	12	1	2	3	Total
供給量/Supplied Quantity	94,326	76,782	74,992	81,431	74,782	66,444	75,143	69,558	0	0	0	0	613,458
うち生産量/Production	31,124	28,270	27,418	32,089	25,885	28,276	31,210	34,984					239,256
うち輸入量/Imports	63,202	48,512	47,574	49,342	48,897	38,168	43,933	34,574					374,202
推定出回り量/Estimated Marketing Quantity	81,839	71,007	68,258	75,914	67,761	67,929	73,874	77,278	0	0	0	0	583,860
うち国産品/Domestic	31,618	27,283	27,030	31,955	25,425	27,023	30,469	34,417					235,220
うち輸入品/Imported	50,221	43,724	41,228	43,959	42,336	40,906	43,405	42,861					348,640
推定期末在庫/Estimated Ending Stock	136,045	141,267	147,229	151,998	158,254	155,848	156,308	147,658	0	0	0	0	-
うち国産品/Domestic	11,835	12,269	11,885	11,271	10,966	11,298	11,230	10,867					-
うち輸入品/Imported	124,210	128,998	135,344	140,727	147,288	144,550	145,078	136,791					-

○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	4	5	6	7	8	9	10	11	12	1	2	3	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	4	5	6	7	8	9	10	11	12	1	2	3	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	4	5	6	7	8	9	10	11	12	1	2	3	Total
供給量/Supplied Quantity	177,756	170,270	147,970	157,834	149,729	147,439	166,367	156,577	0	0	0	0	1,273,942
うち生産量/Production	78,976	76,183	66,310	71,679	65,651	68,773	79,625	78,361					585,558
うち輸入量/Imports	98,780	94,087	81,660	86,155	84,078	78,666	86,742	78,216					688,384
推定出回り量/Estimated Marketing Quantity	170,157	152,741	144,121	156,883	145,992	146,978	165,716	163,590	0	0	0	0	1,246,178
うち国産品/Domestic	79,317	74,520	65,692	73,101	66,675	69,219	79,699	78,249					586,472
うち輸入品/Imported	90,840	78,221	78,429	83,782	79,317	77,759	86,017	85,341					659,706
推定期末在庫/Estimated Ending Stock	196,729	214,164	217,906	218,756	222,398	222,777	223,306	216,186	0	0	0	0	-
うち国産品/Domestic	22,670	24,239	24,750	23,227	22,108	21,580	21,384	21,389					-
うち輸入品/Imported	174,059	189,925	193,156	195,529	200,290	201,197	201,922	194,797					-

○鶏肉需給動向(P.12)

出所：農畜産業振興機構

注：数量は骨付き肉ベース。成鶏肉を含む。輸入量には鶏肉以外の家禽肉を含まない。

Source: Agriculture & Livestock Industries Corporation

Notes:1.Bone in cuts equivalent

2.Figures for stocks are estimated by ALIC

3.The production quantity and the estimated marketing quantity on the domestic one are made public only until February,2010.

(t)

FY 2023/3	4	5	6	7	8	9	10	11	12	1	2	3	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	4	5	6	7	8	9	10	11	12	1	2	3	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	4	5	6	7	8	9	10	11	12	1	2	3	Total
供給量/Supplied Quantity	198,417	200,427	192,542	191,508	186,726	185,041	210,004	196,202	0	0	0	0	1,560,867
うち生産量/Production	146,411	147,168	143,169	139,730	130,029	135,916	147,681	144,235					1,134,339
うち輸入量/Imports	52,006	53,259	49,373	51,778	56,697	49,125	62,323	51,967					426,528
推定出回り量/Estimated Marketing Quantity	201,832	195,686	190,072	192,220	182,753	188,404	206,362	199,413	0	0	0	0	1,556,742
うち国産品/Domestic	147,773	146,411	142,724	140,970	130,403	137,856	148,633	145,657					1,140,427
うち輸入品/Imported	54,059	49,275	47,348	51,250	52,350	50,548	57,729	53,756					416,315
推定期末在庫/Estimated Ending Stock	162,563	167,304	169,774	169,062	173,035	169,672	173,314	170,103	0	0	0	0	-
うち国産品/Domestic	35,506	36,263	36,708	35,468	35,094	33,154	32,202	30,780					-
うち輸入品/Imported	127,057	131,041	133,066	133,594	137,941	136,518	141,112	139,323					-

○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)

	4	5	6	7	8	9	10	11	12	1	2	3	Average
FY2023/3	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
FY2024/3	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
FY2025/3	5,055	5,245	5,144	4,698	5,158	4,925	4,763	4,671					4,957

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)

	4	5	6	7	8	9	10	11	12	1	2	3	Average
FY2023/3	566	622	626	662	680	718	757	821	791	787	778	805	718
FY2024/3	772	791	777	794	767	773	775	755	759	732	737	755	766
FY2025/3	734	748	758	769	724	748	733	761					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)

	4	5	6	7	8	9	10	11	12	1	2	3	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)

	4	5	6	7	8	9	10	11	12	1	2	3	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)

	4	5	6	7	8	9	10	11	12	1	2	3	Total
国内生産量/Production	44,987	42,187	41,979	44,172	41,596	41,357	42,411	44,339					343,028
輸入量/Imports	2,999	2,525	2,614	3,073	2,899	2,532	2,862	2,806					22,310
合計/Supplied Quantity	47,986	44,712	44,593	47,245	44,495	43,889	45,273	47,145	0	0	0	0	365,338

○「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 Expenditure Survey"

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

(g)

2022	1	2	3	4	5	6	7	8	9	10	11	12
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	1	2	3	4	5	6	7	8	9	10	11	12
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	1	2	3	4	5	6	7	8	9	10	11	12
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	711	686	772	
牛肉購入数量/Beef	452	413	467	450	477	429	411	484	481	422	457	
豚肉購入数量/Pork	1,823	1,883	1,921	1,791	1,835	1,804	1,702	1,707	1,740	1,774	1,856	
鶏肉購入数量/Chicken	1,501	1,584	1,614	1,509	1,569	1,568	1,385	1,399	1,526	1,584	1,586	

○「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 Expenditure Survey"

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

(yen)

2022	1	2	3	4	5	6	7	8	9	10	11	12
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	1	2	3	4	5	6	7	8	9	10	11	12
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	1	2	3	4	5	6	7	8	9	10	11	12
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	1,181	1,218	1,333	
牛肉 支出金額//Beef	1,752	1,522	1,704	1,602	1,795	1,610	1,554	1,855	1,644	1,631	1,560	
豚肉 支出金額/Pork	2,866	2,808	2,893	2,695	2,742	2,727	2,724	2,749	2,688	2,850	2,927	
鶏肉 支出金額/Chicken	1,608	1,605	1,650	1,539	1,585	1,524	1,411	1,427	1,467	1,595	1,629	

○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

(%)

	4	5	6	7	8	9	10	11	12	1	2	3	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	108.2	106.1	110.5					107.9

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

(%)

	4	5	6	7	8	9	10	11	12	1	2	3	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	102.1	105.4	* 104.5				103.5

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