

Contents

Foreword	i
Tables	ix
Figures	x

I. General Introduction and Summary

—Changes in Agriculture and Food Consumption in Japan Created by Increased Imports of Agricultural Products—

Hiroyoshi Toda

1. Japan, a Large Food-Importer	1
(1) Major Themes of This Chapter in Relation to Food Imports of Japan	1
(2) Meats as the Top Imported Agricultural Products in Japan, and USA as the Top Agricultural Exporter to Japan	3
2. Expansion of Imports as if Driven by a Three Stage Explosion Rocket-type Force	5
(1) Wheat, Barley, Feed Grains and Soybeans: Main Imported Commodities	5
(2) Trade Liberalization for Pork and Expansion of the Import Quota for Beef	8
(3) Import Liberalization for Beef, Oranges and Fruit Juice	11
3. Imports of Agricultural Products Influencing Dietary Habits	12
(1) Changes in Dietary Habits Caused by Agricultural Imports	12
(2) Economics and Culture in relation to Food and Dietary Habits	15
4. Imports of Agricultural Products and Domestic Agricultural Production	18

(1) A Narrowing Down of the Domestic Agricultural Areas Economically Feasible for Production	18
(2) Decline of Domestic Agriculture and the Environmental Conservation	20
5. Expansion of Imports and the Domestic Agricultural Market	23
(1) Expanded Imports and a Lowering of the Price Received by Agricultural Producers	23
(2) Importation of Agricultural Products and the Agricultural Price Support System	26
6. Prospects for the Importation of Agricultural Products and Two Kinds of Food Security	28
(1) Import Slowdown and Self-Sufficiency Ratios	28
(2) Safety of Imported Agricultural Products	31
(3) Food Security and the Protection of Good Farmlands	32
7. Summary	34
(1) Vegetables	34
(2) Fruits	35
(3) Meats	37
(4) Milk and Dairy Products	38

II. Vegetables

Koji Fujishima

1. Imported Vegetables Reached One-Fourth of the Total Amount in Domestic Distribution	41
(1) Definition of Vegetables in This Chapter	41
(2) A Sharp Increase in Vegetable Imports Starting in the Mid-80's	42
(3) The Share of Imported Vegetables Rapidly Rising since the Mid-80's	44
2. Yearly Increase in Frozen Vegetable Imports and the Main Factors Involved	45
(1) Types of Processed Vegetables	45

(2) A Rapid Increase in Frozen Vegetable Imports Starting in 1985	47
(3) Effects of the Yen Appreciation after the "Plaza Agreement" and the Emergence of China as a Major Supplier to Japan	48
3. A Rapid Increase in Fresh Vegetable Imports and the Main Factors Involved	51
(1) Continuous Massive Imports Starting in 1988	51
(2) Tangible Decline in Domestic Vegetable Production Capacity	53
4. Changes in the Domestic Market Caused by an Increase in Imports	56
(1) Decline in the Role of Wholesale Markets in Vegetable Distribution	56
(2) Stabilization of Vegetable Prices at a Low Level	59

III. Fruit

Takashi Toyoda

1. Trade Liberalization and Import Expansion	65
(1) Trade Liberalization—from the Japan-US Agreement to the WTO System	65
(2) A Big Fall in the Self-Sufficiency Ratio	67
(3) Imports of Fresh Fruit by Item	68
(4) Imports of Processed Fruit Products by Item	69
2. Changes in Fruit Demand and the Consumption a la Japan	70
(1) Fruit Consumption a la Japan and the Consumption Trend of Youth	70
(2) High Quality and Everyday Fruit	72
(3) Growth of High Value-Added Products in the Changing Food System	73
3. Pricing and Marketing Methods Affected by Increased Imports	74
(1) Pricing of Domestically Grown Fresh Fruit	74

(2) Pricing of Imported Fresh Fruit	76
(3) Pricing of Imported Fruit Juice	77
(4) Change in Marketing Methods	79
4. Structural Change in Domestic Production	79
(1) Decline of Fruit Growing for Processing and Predominance of Leading Fresh Fruit Areas	79
(2) Structure of Fruit Farming and the System of Labor Saving Techniques with Low Height Fruit Trees	81
(3) Quest for a Resource Recycling Industry	83
5. Problems Resulting from Increased Imports	83
(1) Positive and Negative Aspects of the Japanese Consumption Style of High Quality Fruit	83
(2) Increased Imports and Food Safety	84

IV. Meat

Shinichi Kobayashi

1. Themes of This Chapter	87
(1) Problems Facing the Livestock Industry, a Paragon of the Agricultural Basic Law	87
(2) Vanishing of Factors Contributing to the Livestock Industry, and the Direction toward Its Sustainable Development	89
2. Meat Consumption Trend	91
(1) Meat Consumption Tending toward Stagnancy	91
(2) Pork, Chicken and Beef, Vying with Each Other for Per Capita Consumption, Once Led by Pork	93
(3) Meat Consumption Relying Increasingly on the Food Service Industry Based Mainly on Imported Meat	95
(4) Future Prospect for Meat Consumption	98
3. Increasing Imports and Their Backgrounds	103
(1) Broilers	103
(2) Eggs	104

(3) Pork	104
(4) Beef.....	106
4. Effects of and Responses to Growing Imports	109
(1) Effects of Growing Imports	109
(2) Managerial Responses on Farms	112
1) More Farms Discontinuing Livestock Raising while the Remaining Farms are Enlarging Their Scale of Operation	112
2) Increase in Crossbreed Fattening and Problems of Dairy Farmers	113
3) Brand Naming	115
5. Conditions for Sustainable Development of Livestock Farming	118
(1) Role of Livestock Farming in the Recycling of Resources	118
(2) The Direction toward Developing Land-Using-Type Livestock Farming	122

V. Milk and Dairy Products

Kohei Kobayashi

1. Trend of Production of Raw Milk and Dairy Products in Japan and That of Imported Dairy Products	127
(1) Increased Production Amount of Raw Milk, Drinking Milk and Dairy Products	127
(2) Changes in the Dairy Product Import System Resulting from the Uruguay Round Agreement	130
(3) Imports of Dairy Products after the UR Agreement	133
2. Changes in Consumption of Milk and Dairy Products	140
3. Domestic Marketing of Imported Dairy Products	145
4. Influence of Imported Dairy Products on Pricing and Marketing	148
5. New Policy Principles for Dairy Farming and the Milk Industry	150
6. Concluding Remarks	151