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THE BEEF MARKET IN JAPAN (MERCADO DE LA CARNE EN JAPON), paper presented at SEMINARIO・INTERNATIONAL …… MODERNIZACION DEL SECTOR CARNE BOVINA: PRODUCCION, INDUSTRIA, MERCADO[1]; CONCEPCION・CHILE, 16, 17, 18 NOVIEMBRE, 1993

by Hiroshi Mori

§1 Introduction

The key concept of my presentation today is "quality" (calidad), as your customers

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perceive it or as it is manifested in the market, but not as you or your scientists conceive it. For example, Japan imports a large quantity of canned tuna fish from Thailand and exports live cats to that country in return. Japan imports canned tuna from Thailand for cat food. When Thailand first exported canned tuna to Japan, it did not sell well there, because most Japanese cats did not care for it. Then clever Thai businessmen began to import live cats from Japan to use in taste panels for quality control.

In contrast, I spent one year in New Zealand (N.Z.) from 1991 to 1992. When I was there, one N.Z. agricultural college carried out an extensive consumer panel study to find out whether people could tell the difference between locally produced grass-fed beef and grain-fed beef which was produced in the United States and Australia. This group of scientists found out statistically that the majority of people they surveyed could not tell the difference and, even more importantly, that more people liked grass-fed beef than grain-fed. But as you'll see later from my presentation, N.Z. has not been doing well in her beef export business to Japan in competition with the U.S. and Australia.

I would argue that this is partly because they chose their local farmers who came to the Agricultural Fair to serve on their consumer panels instead of using Japanese nationals, unlike the Thai tuna fish exporters have done. Japan is a complex country where "beef is not beef"[2] and even tuna for cats cannot be treated as a homogeneous fish. Today, I am going to elaborate on this point.

§ 2 Basic Statistics of Japan's Socio-Economy

As is shown in Table 1, Japan has a population of approximately 125 million, about half that of the United States. The GNP was 471 trillion yen in Japanese currency ($ 3,744 billion in US currency), in the Japanese fiscal year (JFY) 1992, ended March 31, 1993, with a *per capita* GNP at approximately US $ 30,000 in 1992 and (somewhat greater in 1993 in dollar terms, mainly due to the stronger yen). Until recently, Japan's economy made rapid and steady growth since the 1960s, with the real GNP up more than 300 percent from 1965 to 1992. Despite a prolonged bearish economy in recent years, the unemployment rate was much lower in Japan at 2.2 percent in 1992 and 2.7 percent in 1993 than in most Western nations. Inflation has been quite moderate during the past

twenty-odd years, except for the two oil crises in 1972/73 and 1979.

Compared to most other OECD countries, and some developing countries, in particular, income distribution has been quite moderate in Japan. As a consequence, the Japanese socio-economy has been known for its stability and homogeneity.

With very limited natural resources relative to its population, Japan has traditionally been heavily dependent upon foreign trade: imports for materials and exports for processed products. For example, Japan exported US $ 340 billion worth of products, accounting for nearly 10 percent of the GNP in 1992 and imported US $ 233 billion from overseas in the same year.

The main exports are machinery and equipment, including automobiles and electrical and electronic products, which accounted for 75.5 percent of total exports in 1992. Textiles and textile goods were the biggest export items in the 1950s to 1960s, which accounted for 30 percent of all exports in 1960, for example. Today, textiles and textile goods account for less than 3 percent of total exports, whereas metal products and chemical products account for a much larger share (see Table 1 for details).

On the other hand, mineral fuels, i.e., crude oil, liquified natural gas, etc. are the major import items, accounting for 23 percent of all imports in 1992. Non-metal raw materials such as lumber, feed grains, textile materials, etc. and metal ores and scrap are still major imports, accounting for 7.9 and 3.3 percent of total imports in 1992, respectively. All these fuels and raw materials accounted for as much as 66 percent of all imports in 1960. Imports of finished products, machinery and equipment and textile products are on the increase in importance, accounting for 19 and 7 percent of all import, in 1992, respectively.

Major destinations for exports in 1992 include the USA ($ 95.8 billion), followed by the EC ($ 42.9 billion), Taiwan ($ 21.7 billion), Hong Kong ($ 20.7 billion), etc. Exports to South America as a whole have been increasing in recent years but still are much smaller than those to Singapore alone (see Table 1 for details). Major sources of imports in 1992 are the USA ($ 52.2 billion), the EC ($ 31.3 billion), China ($ 17.0 billion), etc. Imports from South America are on the increase, exceeding $6 billion in 1992, but still smaller than those from Taiwan ($ 9.4 billion).

The trade imbalance between the USA and Japan and the EC and Japan has been

Table 1. Basic Statistics on the Japanese Socio-Economy

−Population :	124,452,000, as of 1992
−Unemployment rate :	2.2 % (of 65,800,000 work force)
−GNP :	471 trillion yen, 1992 Fiscal Year (4/1-3/31), (US$ 3,774 billion)
−Currency :	Yen (US$ 1.0 = 124.80 yen, 1992 FY ; US$ 1.0 = 108 yen, Nov. 1993)
−Average annual inflation rate, 1988-1992 :	2.3 %
−Total exports :	US$ 340 billion, 1992
−Total imports :	US$ 233 billion, 1992
−Major export items :	Machinery & Equipment ($ 256.8 b.); Metal Products ($ 21.3 b.); Chemicals ($ 19.1 b.); Textiles ($ 8.6 b.), etc. for 1992
−Major import items :	Mineral Fuels ($ 52.7 b.); Machinery & Equipment ($ 42.9 b.); Food Stuff ($ 21.3 b.); Non-metal Raw Materials ($ 18.4 b.); Chemicals ($ 17.4 b.), etc. for 1992
−Major destinations for exports, 1992 :	U.S.A. ($ 95.8 b.), EC ($ 62.5 b.), Taiwan ($ 21.7 b.), Hong Kong ($ 20.7 b.), S. Korea ($ 17.8 b.), Singapore ($ 13.0 b.), China ($ 12.0 b.), ..., South America (*) ($ 4.0 b.)
−Major sources of imports, 1992 :	U.S.A. ($ 52.2 b.), EC ($ 31.3 b.), China ($ 17.0 b.), Indonesia ($ 12.2 b.), S. Korea ($ 11.6 b.), Saudi Arabia ($ 10.2 b.), Taiwan ($ 9.4 b.), ..., South America (*) ($ 7.0 b.)

(*) - 1991

conspicuous in recent years, culminating to the world economic and political disputes on various occasions. As a consequence, Japan has been internationally under heavy political pressure to import more, especially to import more finished products from these regions. Japan's contention is that: "You can bring a horse to water but can not force it to drink water", that is, politics cannot dictate what people buy, unless they are offered attractive products and that the huge trade deficits of the USA has been caused by its fiscal deficits and its "excessive" domestic consumption and/or "too little" demestic savings.[3]

§ 3 Japan's Food Consumption, with Emphasis on Meats.

Compared to most Western nations, Japan's food consumption is typified by a considerably larger quantity of cereals, much less livestock products, meats and milk and dairy products and appreciably more fish and shell-fish (fish, hereafter). *Per capita* consumption of cereals was a little over 100kg in Japan in 1991, approximatoly 35 percent more than most Western nations. On the other hand, consumption of meats was about 30kg in 1991, less than 1/3 of that in the latter. Consumption of milk and dairy products is also very low at 85kg per year, about 1/3 that of the Western nations. Less consumption of livestock products is partly compensated by a consiberably larger amount of fish consumption, i.e., 36kg per year, as compared to approximately 8kg in the USA and West Germany, for example (see Table 2 for more information).

It is often said that Japanese food consumption has gradually become "Westernized"

Table 2. Japanese per capita Food Consumption by Major Food Categories, in Comparison with Selected Western Nations (kg./year)

	Japan (1991)	U. S. A. (1988)	W. Germany (1988)	N. Z. (1982)
	kg.	kg.	kg.	kg.
Cereals	103. 3	75. 9	77. 7	72. 6
Potatos	36. 5	33. 5	73. 0	57. 1
Sugar	20. 9	60. 3	38. 6	31. 7
Pulses	9. 6	7. 2	4. 2	3. 4
Vegetables	105. 2	92. 2	87. 7	98. 1
Fruits	34. 9	62. 8	138. 8	85. 9
Meats	28. 9	120. 3	104. 0	107. 8
Eggs	17. 3	14. 5	16. 0	15. 4
Fish	35. 9	8. 2	8. 3	5. 0
Milk & Dairy Products	84. 8	254. 3	297. 6	322. 5
Fat	14. 0	26. 0	20. 2	9. 1

Sources : MAFF, *Food Balance Sheet* for Japan and OECD, *Food Consumption Statistics* for other nations.

in the post-war period, i.e., less and less rice and more and more livestock products. For example, rice accounted for as high as 37 percent of total daily caloric intake in 1970. Starchy food, including pulses was the major source of energy, accounting for 55 percent of daily caloric intake in 1970. Rice consumption has steadily declined with other starchy food items remaining unchanged. In 1991, rice supplied only 1/4 of the total caloric intake. On the other hand, consumption of meats and milk and dairy products has steadily increased (to partially offset the decrease in rice consumption) from 1970 to 1991. Fat intake has also increased noticeably during the same period, implying that the Japanese diet has been shifting toward the fatty Western-style from the traditional rice and salty pickles-miso soup diet. As a matter of fact, it is estimated that *per capita* farm household daily intake of salt, (NaCl) decreased from 21.0 grams (g) in the early 1970s to 13.5 g in the early 1990s (the Ministry of Agriculture, Forestry and Fisheries).

It should be noted from Table 3 that the total caloric intake increased only very moderately from 2,529 kilo calories (KC) in 1970 to 2,622 KC in 1991, apparently much lower than in most Western nations which average 3,200~3,300 KC per day.

Japanese, both male and female, have become significantly taller in the last 50 years or so. For example, males at age 20 increased in height from 163.7 cm in 1937 to 169.4 cm in 1977 and 171.4 cm in 1991 and females at age 20 increased from 152.3 cm to 156.7 and 158.4 cm in the same period. It might be of more than passing interest to note that the average weight of females increased only slightly from 49.5kg to 51.1kg, whereas that of males increased more noticeably from 55.6kg to 63.9kg. As can be seen from Table 4, the sitting height of people at age 20, both male and female, stayed almost the same at 90.0 cm for males and 84.0 cm for females during the same period, implying that younger Japanese are becoming more "Westerized" even in their physical structure. As mentioned earlier, consumption of meats has more than doubled in the past 20 years or so. Pork, chicken and beef are the three major classes of meat in Japan, with horse meat, sheep meat and whale meat insignificant in consumption. *Per capita* consumption of pork increased from 5.3kg (per year) in 1970 to 11.5kg in 1991 and it is commonly assumed to have reached a saturation point, and that of chicken increased more sharply from 3.7 kg in 1970 to 10.4kg in 1991 and is estimated to grow moderately to 12~13kg toward the end of the century[4].

Table 3. Changes in Japanese Food Consumption by Major Food Categories, 1970 to 1991, in Terms of Daily Caloric Intake

	1970	1980	1985	1991
	KC	KC	KC	KC
Rice	927.6	770.0	727.3	680.1
Wheat	310.3	325.0	319.7	319.0
Potatoes	39.2	41.3	45.3	48.9
Pulses	115.2	97.4	104.5	110.2
Meats	80.5	138.3	154.9	182.4
Milk & Dairy Products	82.3	107.4	116.1	146.0
Eggs	64.4	63.5	66.0	76.5
Sugar	282.6	244.8	227.2	218.7
Vegetables	77.7	79.3	80.4	79.2
Fruits	53.2	53.6	52.9	53.5
Fish	102.2	133.4	135.7	130.6
Fat	227.1	319.5	353.8	354.1
Others	75.8	110.5	134.4	152.2
Total	2,529.0	2,561.5	2,592.0	2,622.0

Sources : MAFF, *Food Balance Sheet*, various issues.

Per capita consumption of beef increased sharply from 2.2kg (boneless weight) to 3.5 kg in 1980 and to 6.2kg in 1991 (Table 5). Unlike pork, beef is believed to be still growing in consumption and reach levels of 8.0 to 9.0kg, at the minimum, by the year 2000[5]. It is widely accepted that demand for beef in Japan is both price-and income-elastic[6], implying that its consumption will increase significantly as the price is lowered and the economy continues to grow.

Table 4. Changes in Average Height and Weight of Japanese Males and Females at Age 20, 1937 to 1991

	Male		Female	
	Height	Weight	Height	Weight
	cm	kg	cm	kg
1937	163.7 (89.5)	55.6	152.3 (84.0)	49.5
1955	165.5 (90.1)	56.0	154.3 (84.0)	49.9
1977	169.4	60.5	156.7	50.6
1991	171.4 (90.5)	63.9	158.4 (84.3)	51.1

Notes : Figures in parentheses denote sitting height.
Sources : Asahi Shimbun, JAPAN ALMANAC 1994, Tokyo, p.218.

Table 5. Changes in Japanese per capita Annual Meat Consumption[1] by Major Categories, 1970 to 1991

	1970	1980	1985	1991
	kg.	kg.	kg.	kg.
Meat Total	13.4	22.5	25.1	29.2
Beef	2.2	3.5	4.4	6.2
Pork	5.3	9.6	10.3	11.5
Chicken	3.7	7.7	9.1	10.4

Notes : 1) Boneless weight.
Sources : *Food Balance Sheet*, op cit.

§ 4 Sources of Beef Supply: Domestic Production and Imports

In the early 1970s when Japanese consumption of beef was still very low, Japan was almost self-sufficient in beef supply, with the domestic production accounting for more than 80 percent of the total requirement. As the consumption of beef increased, the

domestic production increased from a 200 kilo ton (kt) level in the early 1970s to a nearly 400 kt level in the late 1980s, whereas imports were increased dramtically from a 50 kt level to a 350 kt level during the same period. In 1989 to 1990, shortly before the beef trade was liberalized in April 1991, Japan's self-sufficiency in beef was down to 50 percent, with imports accounting for half of the total requirement (Table 6).

It is not certain whether domestic production will continue to grow any further or even to decline on the contrary. It is, however, unlikely that an increase, if any, in domestic production should be sufficient to fill any expected increase in demand for beef in the future. It might be generally agreed that imports should cover most of any future demand increase.

Table 6. Japan's Beef (and Veal) Production and Imports JFY[1] 1970 to 1992

JFY	Production (Boneless Weight[2])	Imports (Boneless Weight)
	1,000 mt	1,000 mt
1970	197	26
1975	235	64
1980	302	120
1985	389	158
1988	398	285
1989	377	364
1990	388	384
1991	407	327
1992	417	427

Notes : 1) April 1 to March 31.
2) Carcass weight converted by a factor of 0.70.

Sources : MAFF, *Meat Statistics*, March 1993, and *LIPC Monthly*, various issues.

There are basically two sources of beef production in Japan, i.e., fed Wagyu, a beef breed and fed dairy steers and heifers and dairy culls. Wagyu is an indigenous beef breed[7] which has been bred to marble extremely well, a quality requirement for traditional Japanese cuisine such as *suki yaki* and *shabu shabu*[8]. Male dairy calves which used to be sent for slaughter immediately after birth until the late 1960s are now grain-fed for 13 to 15 months to the average live-weight of 710~730kg, a carcass weight of approximately 420kg. Wagyu steers are normally grain-fed for 22 months or so to the average live-weight of nearly 700kg, a carcass weight of 420kg.

It should be mentioned here that the slaughter weight of both dairy steers (and heifers) and Wagyu steers (and heifers) has increased appreciably over the past 20 years or so, partly due to technological improvements and to a desire to produce better meat, as conceived by Japanese consumers. The average carcass weight of dairy steers increased from approximately 300kg in the early 1970s to 430kg in the early 1990s and that of Wagyu steers increased from around 310kg to a little over 420kg during the same period. It may not be likely, however, that this past trend will continue in the next decade, possibly due to physiological constraints of bovine animals.

As is shown in Table 7, beef from the dairy sector, about 20 to 25 percent of which is

Table 7. Japan's Beef and Veal Production by Types of Cattle, Boneles Weight, JFY 1970 to 1992

JFY	Total	Wagyu Beef	Dairy Beef
	1,000 mt	1,000 mt	1,000 mt
1970	197	108	84
1975	235	91	142
1980	302	93	208
1985	389	141	242
1990	388	135	242
1991	407	142	250
1992	417	149	255

Sources : The same as Table 6.

estimated to come from cull cows[9], exceeds beef from the Wagyu sector in tonnage, i. e., changing from a ratio of 2 to 1 in the early 1980s and to a ratio of 5 to 3 in the early 1990s. As the demand for milk and dairy products seems to have reached a saturation point or will grow much more slowly than that for beef, beef from the dairy sector is not likely to increase. On the other hand, it is technically possible to expand the Wagyu herd gradually but it is not yet certain whether the Wagyu beef production will continue to increase, because of worsning economic conditions brought about by the beef trade liberalization in 1991. As will be stated later, the domestic dairy beef sector has been hit much more severely by the trade liberalization than the Wagyu sector, because imported beef is said to compete more directly with dairy beef than Wagyu beef in terms of quality. Some dairy farmers are producing Wagyu-dairy F1 beef or 3/4 Wagyu beef, and Wagyu embryo-transfers into dairy cows are reported to have passed experimental stage[10].

§ 5 Changes in Beef Import Policies

Until April 1, 1991, Japan's beef imports had long been subject to import quotas, about 80 percent of which were allotted to the Livestock Industry Promotion Corporation (LIPC), a quasi-government agency. The LIPC was created in 1961 to administer the government's price stabilization program for various livestock products which included dairy products and pork (from 1961 on) and beef (from 1975 on). At the beginning of each fiscal year, the government would set the price stabilization bands for Wagyu and other (dairy) beef carcasses. The LIPC was then assigned the task of keeping the wholesale prices of domestic beef within these price bands by regulating purchases and sales of imported beef from overseas. It is open to question whether the LIPC was wholly successful in stabilizing domestic beef prices[11], but there is no question that the prices of imported beef had been kept quite high in the Japanese market relative to its import CIF prices, thus allowing for enormous amounts of profits to the LIPC and other imported beef related organizations.

Tariff equivalents of quotas and other non-tariff barriers which included the involvement of the LIPC in the beef import business were estimated to be at around 100 percent

in 1987 to 1988[12], appreciably higher than the prevailing *ad valorem* tariff of 25 percent.

As is shown in Table 8, import quotas were set at relatively low levels around 135 kt from 1980 to 1982. At the 1983 Multilateral Trade Negotiations with the U.S. and Australia, Japan agreed to increase quotas by 9.0 kt every year over the five year period of 1983 to 1987. Actual imports were increased by almost 30 kt in 1986 and 1987, respectively. This was done to politically conform to the mounting domestic pressure for cheaper agricultural products, in particular beef, in the wake of a dramatically strength-

Table 8. Changes in Import Quotas, Tariffs and the Involvement of LIPC[1], JFY 1980 to 1992

JFY	MTN[2] Agreed Imports Quotas	Actual Imports[3]	Tariff	LIPC Involvement
	1,000 mt	1,000 mt	%	
1980	134	124	25.0	Active
81	127	121	〃	〃
82	135	139	〃	〃
83	(+ 9.0)	146	〃	〃
84	(+ 9.0)	149	〃	〃
85	(+ 9.0)	158	〃	〃
86	(+ 9.0)	188	〃	〃
87	(+ 9.0)	224	〃	〃
88	(+60.0)	285	〃	Weaker
89	(+60.0)	364	〃	〃
90	(+60.0)	384	〃	〃
91	Removed	327	70.0	Absent
92		423	60.0	〃
93		500?	50.0	〃

Notes : 1) Livestock Industry Promotion Corporation, a quasi-government agency. See the text for more information.
2) Multilateral Trade Negotiations, between Japan and the U.S. and Australia.
3) Imports were increased beyond agreed quotas in some years.

ened Japanese yen against currencies in exporting countries[13].

In June 1988, the Japanese government finally conced to the persistent demands for free market access by the governments of US and Australia, i.e., to replace import quotas and the involvement of the LIPC in beef imports by higher tariffs, starting in JFY 1991. During the three year phasing-out period, it was agreed that quotas were to be increased by 60 kt each year from the base line of 214 kt of JFY 1987. It was also understood that the LIPC would expand Simultaneous Buy Sell (S/B/S) system to allow for Japanese end-users to negotiate with exporters more freely on specification of cuts and prices.

In compliance with the 1988 agreement, beef imports were increased by 61 kt in 1988 and 79 kt in 1989, up almost 30 percent over the previous year's level, respectively. The stocks of imported beef held by the LIPC and the private sector ballooned from 58 kt in March 1989 to over 100 kt in the year-end and stayed at this high level throughout JFY 1990 until the quotas were finally removed in April 1991. Because of a weak market aggravated by the presence of huge stocks, imports in 1990 fell short of the agreed quota level of 394 kt by 10 kt, as shown in Table 8.

In JFY 1991, ended March 1992, imports were 327 kt, 15 percent below the JFY 1990 level, largely due to the huge inventory of frozen beef which had to be disposed of before the tariff was scheduled to decline from 70 percent in 1991 to 60 percent in 1992 with a further decline to 50 percent in 1992[14].

Despite the economic recession after the long "bubbling" boom from 1987 to 1991, beef imports recovered past trends of increase to 423 kt in JFY 1992 and is quite likely to be a little over 500 kt in JFY 1993, ending March 31, 1994. Conceivable reasons are 1) the tariff was lowered by 10 percentage points twice in 1992 and 1993, of equal important, 2) the Japanese yen appreciated steadily against currencies in beef exporting countries, i.e., from 135.52 yen against the US dollar in 1991 to 127.67 yen and a little below 110 yen in 1992 and 1993, respectively and from 106.86 yen against the Australian dollar to 95.27 yen and approximately 75 yen, respectively during they same period. Finally, the author presumes, that 3) the Japanese meat trade and the final consumers as well have become accustomed to imported beef while exporters have learned to tailor their products for Japanese tastes.

§ 6 Major Sources of Imports

In the early 1970s when imports were low, accounting for less than 20 percent of the total requirement, Australia was the dominant supplier. From 1975 to 1990, imports were increased fivefold from 64 to 384 kt in total whereas those from the US increased as high as 23-fold, and those from New Zealand only twofold (Table 9). As a consequence, the US market share in the Japanese beef imports rapidly rose from 1.5 percent in 1970 to 20.0 in 1980, 31.5 in 1985 and 42.7 percent in 1990, respectively mainly at the sacrifice of Australia. In 1990, New Zealand's share was only 3.5 percent, followered by Canada, Mexico and others all of which accounted for 2.1 percent of total imports.

Table 9. Japan's Beef and Veal Imports by Major Countries of Origin, JFY 1970 to 1992

JFY	Total	U.S.A.	Australia	N.Z.
	1,000 mt	1,000 mt	1,000 mt	1,000 mt
1970	26.3	0.4	23.0	2.6
1975	63.8	6.9	51.5	4.4
1980	120.2	24.0	89.8	4.6
1985	157.7	49.7	97.4	6.2
1988	285.4	118.7	148.3	11.3
1989	364.0	151.7	189.9	13.5
1990	384.2	164.2	198.5	13.3
1991	326.9	141.5	176.0	5.3
1992	423.4	182.9	227.6	8.9

Sources : The same as Table 6.

This remarkable increase in the US share in the Japanese beef imports market can be ascribed to (not necessarily in the order of importance): 1) the alleged, increasing preference of Japanese end-users for grain-fed beef as opposed to grass-fed beef traditionally shipped from Oceania, 2) Japanese import policies manipulated politically in favor of the US[15], and 3) the aggressive market development programs initiated by the US

Meat Export Federation (MEF) and US meat packers.

In April 1991 beef trade was liberalized with import quotas and the involvement of the LIPC replaced by a higher tariff of 70 percent. The first year imports declined by 15 percent as mentioned earlier. Imports from the two major sources fell nearly equally in terms of percentage and those from NZ fell 60 percent. In the second year of post-liberalization, total imports exceeded the pre-liberalization level by about 10 percent, with both Australia and the US gaining 15 and 11 percent, respectively. The share of NZ fell from 3.5 to 2.1 percent and that of other ccuntries from 2.1 to 1.0 percent, respectively from 1990 to 1992. The author assumes that it might have been easier for the less marketing-oriented exporters to sell to Japan through the LIPC, a semi-government organization, than under free-market competition. At the government formal tender, price is often the dominant determinant in procuring business rather than quality, packaging, etc.

As shown in Table 10, beef imports in chilled form kept rising significantly since 1986 whereas those in frozen form seem to have peaked in 1989-90 and levelled off or even slightly declined. In JFY 1986, for example, chilled beef accounted for approximately 25 percent of total imports, with the remaing 75 percent imported in frozen form (about 3 percent in boiled form). Chilled beef accounted for 1/3 of total imports in 1989 and exceeded frozen beef in volume in 1991-1992, as is shown in Table 10.

Table 10. Japan's Imports of Chilled Beef by Major Countries of Origin, Boneless Weight, JFY 1986 to 1992

JFY	Chilled Total	U.S.A.	AUS	N.Z.	Frozen Total
	1,000 mt	1,000 mt	1,000 mt	1,000 mt	1,000 mt
1986	48.3	2.4	45.0	0.8	134.5
1987	60.7	6.8	52.9	0.8	156.2
1988	80.3	11.9	66.8	1.1	197.3
1989	120.6	22.6	96.2	1.2	235.7
1990	149.9	28.7	119.2	1.4	230.0
1991	170.1	47.6	121.3	0.8	151.4
1992	216.9	61.6	152.6	2.3	202.4

Sources : Custom Bureau, *Japan Exports and Imports*, various issues.

Up to 1986-87, chilled beef imports from the US were insignificant, with the majority supplied by Australia. Chilled beef from the US increased dramatically from 2.4 kt in JFY 1986 to 11.9, 28.7 and 61.6 kt, respectively in JFY 1988, 1990 and 1992. Chilled beef imports from New Zealand have been insignificant for the entire period. It is said that the shelf-life of US chilled beef has remarkably improved lately on the one hand and most US packers can ship selected cuts to Japanese buyers instead of full set[16] as has been the case of Australian packers, on the other hand.

Australia was traditionally a grass-fed beef exporter. As the demand for grain-fed beef or HQ beef has become conspicuously stronger in Japan, Australia started to produce grain-fed beef for shippment to the Japanese market. According to the Australian Meat and Live-Stock Corporation (AMLC), grain-fed beef exported from Australia to Japan in chilled form[17] increased from 4 kt in 1987 to 22, 46 and 57 kt, respectively in 1989, 1991 and 1992, accounting for more than 25 percent of its total exports to Japan in 1992 (*The Daily Meat News*, March 16, 1993).

§ 7 Striking Features of the Japanese Beef Market: "Beef is not Beef in Japan"

In one of big supermarkets in Santiago, the author was amazed to find that locally produced wine was selling from 600 pesos per bottle to 1,200, 2,000 and up to 8,000 pesos[18] (wine from France even higher) whereas beef was selling in a much narrower price range, e.g., ground beef for 500 to rib-eye steak approximately 1,000 pesos per kilo, regardless of the type or class of beef such as Angus steers, dairy cows, etc. In this sense, it can be said that *wine is not wine* whereas *beef is beef* in Chile.

As mentioned earlier, there are two types of beef domestically produced in Japan, i.e., Wagyu and dairy beef. Beef carcases are graded by the Japan Meat Grading Association (JMGA) into yield grades, A, B and C, with A being the highest, and quality grades 1 to 5, with 5 being the best. Quality grade is determined by four quality attributes on equal footing, i.e., marbling, meat color and gloss, meat texure and firmness and fat color and gloss[19].

Table 11 illustrates the price variation of beef carcasses by types of cattle and grades

at wholesale level in Japan. It is widely accepted that the Tokyo Market represents the entire nation and it may be proper to add that the year 1991 should represent a rather weak market condition immediately after trade liberalization. At any rate, it can be noticed that Wagyu beef is generally about 50 percent higher in wholesale prices than dairy beef when the same quality grades are compared and that very wide price differentials exist between quality grades even for the same type of beef, e.g., Wagyu steers A5 is more than twice as high as the same class of steers A2 and dairy steers B4 is also twice as high as B2 and dairy females B3[20] is three times as high as females C1.

Table 12 illustrates differentials in wholesale carcass prices by types of cattle and grades in Australia. Steers, over 550kg in liveweight, exportable to Japan are higher than steers of lighter weight but by only 10 to 15 percent and heifers are only 20 percent higher in price than thin cull cows. Such narrow price differentials in Australia should be compared to the wide price differences between Wagyu steers A5~A4 and dairy females B2 or C1 in Japan. Rightly, *beef is beef* in Australia whereas *beef is not beef* in Japan.

When the price of Wagyu beef, A5 or A4 is directly compared to that of heavy steers in Australia, one might conclude that beef in Japan is almost ten times more expensive than in Australia. However, the wholesale price of beef in Japan should be 70 to 80 percent higher than that in Australia, when dairy females of C1 grade are compared to cows, fat score 3 & 4 in Australia.

As one might guess, quantity is more important than quality when people are near

Table 11. Average Wholesale Beef Carcass Prices by Types of Beef and Grades, Tokyo Market, 1991

Grade	A5	A4	A3	A2	
Wagyu Steers (Yen/kg.)	2,709	2,201	1,792	1,232	
Grade		B4	B3	B2	C1
Dairy Steers (Yen/kg.)		1,404	1,152	886	409
Dairy Females (Yen/kg.)		1,484	1,096	704	345

Sources : MAFF, *Meat Marketing Statistics*, 1991.

Table 12. Wholesale Beef Carcass Prices by Types of Cattle and Grades in Queensland, Australia, 16 October 1991

Category	Liverweight	Fat Score	Price Range
	kg.		Cents/kg.
Steers	Over 550	4	220 - 225
Steers	450 - 550	3 & 4	190 - 215
Steers	370 - 450	3 & 4	190 - 205
Heifers	370 - 450	3 & 4	185 - 195
Yearlings	280 - 370	3	190 - 205
Cows	Over 420	3 & 4	177 - 195
Cows	Over 320	1 & 2	160 - 170
Bulls	Over 540	1	185 - 205

Sources : AMLC, *Market Notes*, 18 October, 1991.

Table 13. Changes in Wholesale Price Differentials among Different Types of Cattle and Grades with Dairy Steers 2nd as 100, 1970 to 1990

	Grade[1]	Superior	1st	2nd	3rd	Average
	1990	[214]		178	151	177
Wagyu	1987	200	171	146	121	159
Steers	1980	185	163	139	111	153
	1975	148	133	116	100	127
	1970	160	137	123	101	129
	1990		122	100	86	96
Dairy	1987		128	100	90	95
Steers	1980		121	100	91	96
	1975		112	100	90	94
	1970		112	100	90	95

Notes : 1) As the new grading was put into effect inApril 1988, a consistent comparison over time is not possible. However, 2nd and 3rd grades may roughtly correspond to new quality grades 3 and 2.

Sources : MAFF, *Meat Marketing Statistics*, various issues.

starvation or foods are scarce. As foods become more plentiful and people eat the more, people generally tend to become the more concerned about quality because the human stomach is limited in capacity in spite of increased incomes.

The case of Japanese beef seems to substantiate the above hypothesis. As shown in Table 13, 2nd grade Wagyu steers were around 20 percent higher in price than dairy steers of the same grade in 1970-1975 and the price differentials between the two seem to have widened lately, i.e., Wagyu steers of the 2nd grade are a nearly 80 percent higher in price than 2nd grade dairy steers and those of the 1st grade are more than 100 percent higher than the control. In the 1970s, Wagyu steers of the 3rd grade were traded for the same price as dairy steers of the 2nd grade but are around 50 percent higher in 1990 and have continued to be so lately.

It has often been assumed that imported grain-fed beef, especially from the US, is comparable in quality to domestic dairy beef, 2nd grade or the new grade B3[21]. As far as the author's experience goes, it seems almost impossible for the ordinary Japanese consumers to tell the differences between imported and domestically fattened dairy beef, when properly handled and cooked. However, as shown in Table 14, imported beef, either grain-fed US or grass-fed Australian beef, has been conspicuously discriminated

Table 14. Wholesale Prices of Selected Boneless Primal Cuts by Types of Beef, JFY 1991 Average, Tokyo Area

	Striploin	Shoulder (Clod)	Silverside (Top Round)
	Yen/kg.	Yen/kg.	Yen/kg.
Wagyu Steers			
Grade 3	6,425	2,363	2,186
Dairy Steers			
Grade 3	3,562	1,361	1,332
US Grain-fed			
Frozen	1,629	812	1,040
Chilled	2,500	1,110	1,350
AUS Grass-fed			
Frozen	1,370	639	710
Chilled	1,620	930	740

Sources : MAFF, *Meat Marketing Statistics*, March 1993, and '93 *Shokuniku Sangyo*, Shokuniku Tsushin-sha, December 1992, Tokyo.

from domestic dairy beef in price, not to speak of Wagyu beef. According to regular LIPC monthly surveys, apparent distinctions in retail price are observed between domestic Wagyu and dairy beef and imported US and Australian beef, e.g., the average sales price of domestic Wagyu and dairy sirloin cuts was 938 and 483 yen per 100 g, respectively as against 364 and 308 yen for the same cut of US and Australian beef, respectively in October-December 1992 (Table 15).

Again one might want to ask whether ordinary consumers can tell the difference between these types of beef. The author's response to this question would be, "Yes, quite likely between Wagyu and imported beef but it is not so certain for differences between domestic dairy and imported beef when both are sold fresh or chilled. It is, however, very important to note that such price differentials between domestic and imported beef as observed above have persisted since the LIPC started its retail price survey in July 1991[22].

Some may still want to argue that beef would become a more "homogeneous commodity"[23] in Japan as people eat much more beef. According to meat consumption surveys of Japanese families living in Oceania conducted by Chadee and the author in 1992, it is obvious that ordinary Japanese will not eat more than 10 to 12kg per year even if the price is lowered to international levels and their incomes are substantially larger than now. The author is more inclined to surmise that beef in Japan will continue to be like wine in Chile or brandy in France, i.e., *calidat* would never end to be a major concern for Japanese beef consumers.

Table 15. Average Retail Sales Prices of Selected Cuts by Type of Beef, Oct-Dec 1992 (LIPC Survey)

	Sirloin (*Saroin*)	Clod (*Kata*)	Round (*Momo*)
	yen/100g	yen/100g	yen/100g
Wagyu	938	442	486
Dairy	483	206	331
AUS	308	178	179
US	364	182	218

Sources : *LIPC Monthly,* '93.3, No.42

ENDNOTES

(1) The seminar was attended by nearly one hundred people, approximately 1/3 government, 1/3 academic and 1/3 industry representation, respectively. The theme and objectives, organizer and sponsors and agenda of the meeting are as follows (in the original Spanish).:

Tema y Objectivos: La producción de la came de vacuno en Chile representa un segmento de la economía nacional de gran importancia, ya que implica el uso racional de alrededor de 13,000,000 de hectáreas, con una masa bovina del orden de 3,550,000 animales, 12 mataderos de alta capacidad, más de 200 mataderos pequeños a medianos, con un sistema de distribución a consumidores representado por miles de carnicerías y decenas de supermercados, y una población de más de 13 milliones de chilenos que consumen un promedio de 18kg. de carne de vacuno por habitante.

El sector carne bovina antes señalado requiere una urgente modernización, con adopción de tecnologías de punta, que coloquen a un nivel de alta competitividad a productores, industriales y distribuidores, que permita satisfacer las necesidades y demandas del país, y entrar con probabilidades de éxito al mercado de exportación de carnes rojas de alta calidad.

Por lo anteriormente expuesto, el presente seminario está dirigido a ejecutivos y profesionales que actúan en los diferentes segmentos de la cadena de la carne, especialmente industriales, supermercados y productores.

Organiza: Instituto de Investigaciones Agropecuarias Estacion Experimental Quilamapu.

Sponsors: Ministerio de Agricultura; Sociedad Chilena de Producción Animal; Colegio de Ingenieros Agrónomos de Ñuble A.G.

PROGRAMA

MARTES 16 DE NOVIEMBRE

15 : 00−19 : 00 : Inscripciones

POLITICAS PECUARIAS

19 : 00−20 : 00 : POLITICAS PECUARIAS Y PERSPECTIVAS DEL SECTOR CARNE BOVINA

Juan Agustín Figueroa Yávar, Ministro de Agricultura.

20 : 00—21 : 00 : POLITICAS MACROECONOMICAS PARA EL SECTOR CARNE BOVINA

Jorge Rodríguez Grossi, Subsecretario de Hacienda

21 : 00 : Cóctel

MIERCOLES 17 DE NOVIEMBRE

08 : 30—09 : 00 : Inscripciones

INDUSTRIA

09 : 00—10 : 00 : MAQUINARIA PARA LA INDUSTRIA DE LA CARNE, VENTAJAS Y NUEVOS DISEÑOS.

Bob Mills. Director División de Ingeniería, Instituto de Investigaciones de la Industria de la Carne (**MIRINZ**) Nueva Zelandia.

10 : 00—11 : 00 : DIVERSIFICACION DE LA INDUSTRIA DE LA CARNE.

A.M Pearson, Universidad de Oregon, U.S.A.

11 : 00—11 : 30 : Café

11 : 30—12 : 15 : TIPOS DE ESTIMULADORES ELECTRICOS: VENTAJAS Y COSTOS.

Bob Mills. Director División de Ingeniería, Instituto de Investigaciones de la Industria de la Carne (**MIRINZ**) Nueva Zelandia.

12 : 15—13 : 15 : MESA REDONDA

Moderador: **Donald Long.**

Consultor Internacional de Asesorías Arkansas Ltda. Director Empresas FRIMA/PROCARNE.

13 : 15—15 : 00 : Almuerzo

PRODUCCION

15 : 00—15 : 40 : POTENCIALIDAD DE CHILE PARA LA PRODUCCION DE CARNE BOVINA.

Germán Klee. Coordinador Programa Producción Carne Bovina, INIA.

15 : 40—16 : 20 : SISTEMAS DE PRODUCCION DE CARNE BOVINA PARA DIFERENTES CONDICIONES AGROECOLOGICAS.

Ljubo Goic. Programa Producción de Carne Bovina, INIA.

16 : 20−16 : 50 : Café

16 : 50−17 : 30 : ANALISIS ECONOMICO DE SISTEMAS DE PRODUCCION.

Humberto Navarro. Coordinador Programa Economía, INIA.

17 : 30−18 : 10 : FACTORES QUE INFLUYEN EN LA CALIDAD DE LA CARNE A NIVEL DE PRODUCTORES.

Eduardo Porte. Facultad de Agronomía, Universidad de Chile.

18 : 10−18 : 40 : MESA REDONDA

Moderador: Ignacio Ruiz, Programa Praderas, INIA.

JUEVES 18 DE NOVIEMBRE

MERCADO NACIONAL E INTERNACIONAL

09 : 00−09 : 40 : ANALISIS DEL MERCADO DE LA CARNE EN CHILE.

Horacio Bórquez, Gerente General, Faenadora de Carnes Ñuble.

09 : 40−10 : 40 : MERCADO ESTADOUNIDENSE DE LA CARNE

Donald Long. Consultor Internacional de Asesorías Arkansas Ltda. Director Empresas FRIMA/PROCARNE

10 : 40−11 : 10 : Café

11 : 10−12 : 10 : MERCADO INTERNACIONAL DE LA CARNE VACUNA: SITUACION ACTUAL Y PERSPECTIVAS.

Ignacio Iriarte. Director "Informe Ganadero", Argentina.

12 : 10−13 : 10 : CALIDAD COMO INSTRUMENTO DE MARKETING

István Wessel. Carnes Wessel. Brasil.

13 : 10−14 : 45 : Almuerzo

14 : 45−15 : 45 : MERCADO DE LA CARNE EN JAPON

Hiroshi Mori. Department of Economics, Senshyu University, Japón.

15 : 45−16 : 45 : COMERCIALIZACION INTERNACIONAL DE CARNE BOVINA.

David List. Depto. Procesamiento de Carnes. Instituto de Investigaciones de la Industria de la Carne (MIRINZ) Nueva Zelandia.

16 : 45−17 : 15 : Café

17 : 15−18 : 00 : MESA REDONDA

Moderador: Mario Maino.

Facultad de Ciencias Veterinarias, Universidad de Chile.

CLAUSURA

(2) "Obviously beef is far from a homogeneous commodity in Japan.…… Due to data limitations, researchers have been forced to estimate these market parameters for a single composite commodity 'beef' rather than for each market segment" (Longworth, p.21). *Beef is not beef in Japan* has been refered to the author by variou sources lately since the editor of *Food Policy* put the heading, "When beef is not beef" to Mori's review of Longworth's book, BEEF IN JAPAN in its February 1986 issue, Vol 11/No. 1.

(3) R. Komiya, "Should Japan's Current Surplus in International Balance of Payments Be Reduced ?" and comments by R. Koo, K. Harada, T. Akabane and Y. Ishiyama in subsequent issues along with Komiya's rejoinder.

(4) Ministry of Agriculture, Forestry and Fisheries, "Longterm Prospects of Demand and Production of Agricultural Products (The Year 2000)," January 1990.

(5) Ibid.

(6) Dyck, J.D., "Demand for Meats in Japan: A Review and an Update of Elasticity Estimates," ERS Staff Report No. AGE 5880525, USDA, August 1988 and Mori, H. and B-H Lin, "Japanese Demand for Beef by Class: Results of Almost Ideal Demand System Estimation and Implications for Trade Liberalization," *Journal of Rural Economy,* Vol 61, No 4 , 1990, Tokyo.

(7) See Longworth's BEEF IN JAPAN, especially Chapter 4, "The Wonderful Wagyu".

(8) How marbling is evaluated in the market place is measured with hedonic price analysis by Mori and Lin.

(9) Dairy females accounted for approximately 45 percent of the total dairy beef production in 1990-1991. According to the Japan Meat Grading Association, roughly 50 percent of dairy females were graded 1, the lowest quality grade in the same period.

(10) James Simpson and his Japanese colleagues anticipated in 1985 that the ET would become as popular as AI in the early 1990s in Japan. Their prediction has not yet come true.

(11) Under the conditions of close substitutability between domestically produced beef and imported beef, the LIPC could have regulated the price of domestic beef. This close substitutability was questioned by Mori and T. Inaba and Mori and Lin (1990).

(12) Wahl et al. (1991) estimated the tariff equivalents, as of November 1988, at 190 percent. Mori et al. (1990) estimated them at around 100 percent for 1987-1988.

(13) The US dollar-Japanese yen ratio declined from 239.60 yen to the dollar in 1985 to 169.55 and 145.66 yen, respectively in 1986 and 1987. That of the Australian dollar also declined from 170.06 yen to 116.07 and 103.92 yen, respectively during the same period.

(14) At the GATT-Uruguay Round negotiations, it was reported that Japan would lower the beef import tariff from 50 percent in 1995 gradually to 38.5 percent toward 2000 with some safe-guard measures when imports threaten to increase dramatically above the trigger level (*The Daily Meat News*, December 1, 1993).

(15) Past beef trade talks have been negotiated virtually between the two countries, i.e., the US and Japan, albeit under the name of GATT Multilateral Trade Negotiations. At the US-Japan 1977/78 negotiations, it was basically understood that the quantity of high quality (HQ) beef was to be increased from around 16,800 mt in 1978 to 30,800 mt by JFY 1983. At the 1983 agreement, it was stipulated that Japan should increase import quotas by 9,000 mt each year, 6,900 mt of which was assigned to HQ beef. HQ beef was defined as beef from cattle grain-fed for 100 days or longer and thus could have been shipped by any country. But in actuality, it was regareded as synonimous with USDA Choice (grade) beef.

(16) "Full set" shipments of boneless beef consist of most primal cuts other than shanks and some plates. The proportion of each primal cut in the shipment is the same as in the proportion of that cut in the original carcasses. Since Australia does not have its own domestic market for the type of beef preferred by Japanese end-users such as meat from heavy steers or grain-fed cattle, Australian exporters expect Japanese to import "full set" beef.

(17) The vast majority of grain-fed beef is shipped in chilled form rather than in frozen form. According to the AMLC, only 1.6 kt out of 48.1 kt of grain-fed exports to Japan was in frozen form in 1991. When the market softens, however, some of chilled beef is snap-frozen into "aged" or "Chil-Fro" beef after landing at the Japanese ports.

(18) As of November 1993, Chilean pesos are around 405 pesos to the US dollar.

(19) See Lin and Mori, "Values of Beef Carcass Characteristics in Japan" for more

information about the Japanese beef grading system.

(20) The author was told by some livestock experts that the yield or dressing ratio is the most important factor when live cattle are traded in Chile. It was found that the price differencials between carcass yield grades A and B in Japan are not as great as quality attributes such as marbling and meat texture and firmness which are key, decisive factors in determing wholesale prices.

(21) Longworth equated chilled grass-fed beef from Australia to domestic dairy beef, 2nd grade (Longworth, p 20 and p 197) but he seems to have overestimated the quality of Australian grass-fed beef. Ohga and a group of researchers of the Meat Export Research Center, Iowa State University assumed that imported grain-fed beef was almost identical with domestic dairy beef in their econometric simulations of Japanese beef trade liberalization (Ohga; Wahl et al.).

(22) The retail sales price of sirloin averaged 965, 489, 361 and 299 yen per 100 g for Wagyu, dairy, US and Australian beef, respectively and that of clod 436, 287, 189 and 171 yen, respectively for July-September 1991, for example.

(23) Longworth, op cit, p.21.

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あとがき

9月下旬、かつて奉職していた農水省・農業総合研究所から話しがあり、南米のチリーで11月中旬に牛肉関係の国際セミナーが開かれるので、日本の牛肉市場について報告してくれないかと打診された。B. H. リン氏との共著、*Japanese Beef Market……Distinctly Unique* が校了したところでもあり、GATT やOECD 関係のような政治のからむ会議でもなさそうなので、快く引き受けることにした。

何らかの手違いで大会のプログラムが届いたのが出発間際だったことなどもあり、幾分いらいらさせられ、腰をすえた準備は出来なかったが、おかげ様で無事務めを終え、大した時差ボケにもならず帰国することができた。前出農総研の中川光弘氏、現地でいろいろお心遣いいただいたJICA（国際協力事業団）の鈴木茂博士チームの方々、表その他のタイプに労を惜しまなかった義妹、Fumiko Cosentino 他の諸氏に厚く御礼申し上げたい。

以下はセミナーでOHP を使って説明した幾つかの表に、手短かな解説を加えたものである。英語は導入部をワシントン州立大学のR.ジュソウム氏にみてもらった他は、私の“ジャングリシュ(1)”で、立派なものとは思えない。それでも口頭による発表の際は、同時通訳者がスペイン語に直して、参会者の多くも一応わかったような顔をしてくれたから、手が付けられぬ程ひどいものではないことを願っている。

それにしても今回の国際セミナーを主催されたチリー国立農業研究所・キラマプ試験場の場長（Director, Estacion Experimental Quilamapu, Instituto de Investigaciones Agropecuarias, Chilán-Chile）イサック・マルドナドー・I(2)氏は、初日ホテルに訪ねてこられた冒頭、“I am very sorry that I do not speak English well”. と言われた。日本人そっくりである。氏だけでなくサンチャゴ郊外のラ・プランティナ農試の場長ダニエル・クラロ・M氏との間でもそうであったが、牛肉の事だけでなく果物関係の事でも、僅かな言葉で互にぴんぴん理解し合え、今後の相互交流について気持の良い展望を持つことが出来た。その点英語が変に上手で、思い込みの強いニュー・ジランド（NZ）の人達より何ぼか見込みがある。

今回のセミナーにもNZ のある研究所から2人の専門家がみえていたが、その1人は私に、2日目の会合のあとの夕食の席で、“Women generally love to talk but you also love to talk”（御婦人は一般におしゃべり好きだけど、貴兄も（男のくせに……筆者）よくしゃべる）と皮肉を言った。私のおしゃべり・「長談議」は身内ではつとに知られているが、但しそれは日本語で、自分の好きな領域に限られるのであり、ネイティブ相手に英語では残念ながらそういう訳にはいかない。事実その日も、朝食や昼食の時、また個別報告後のラウンド・

テーブル・ディスカッションの際も、分量ではその男の方が私の5倍はしゃべっている。しかし話のイニシアティブは概して私が握っていたのだが。というのも話題の中心が日本の畜産物需要の事だったし、居合わせた米国ミシガン州立大学の肉の専門家ピアソン元教授が、折りにふれ適確に技術的立場から私をサポートしてくれたからでもある。それにしても大人しい筈の日本人の、下手くそな英語に耳を傾けねばならないのは、これ迄の経験からしても彼のプライドを傷つけたのであろう。

私は1991年秋から92年夏までNZへ、牛肉の対日輸出に関する仕事の手伝いで出向いたが、共同研究者のドリン・チャディー（カナダで教育を受けたモーリシャス人）以外には私に耳を傾けてくれた人はいなかった。アメリカ人に比べると一般に遠慮深いNZ人も、英語だとむこうの方がしゃべるのである。文化的にも先進国であるという思いと、ネイティブとしての英語が組合わされると始末が悪い。特に牛肉については、自分達の方が歴史的にもずっと長期間、しかも現在でも幾倍も沢山食べているから良く知っているという思い込みがある。従って「後進」の日本人の言うことないし言おうとすることなどに耳を傾ける気持ちにはなり難い。だから毎日のティ・ブレイクの際も私に質問なり非難をあびせかけるということにはならないし、折角招待しておきながら研究会で報告をしてくれということも一度もなかった。それは私にとって気が楽でむしろ有難い事であったが、資源の有効利用という観点からは問題があったように思われる。

われわれも「外人」が英語なりフランス語でしゃべってくると神妙にきくが、同じ発言内容でも日本語でやられると、アクセントや珍妙な言い廻しに気が散って、ついつい小馬鹿にしたり、軽視したりする傾向がある。その「外人」が白人でなく、韓国や途上国の人達だったりするとその傾向は一層強くなる。このところ10年間くらいもっぱら英語圏の連中と仕事をしてきた。いつも十分きいてもらえない口惜しさ、わかってもらえないもどかしさはあるが、余計な事を言って際限なく話を拡げることも少なくなったし(3)、第一この年で謙虚になり、おかげで自らの世界が拡がったような気がしている。これが外国語を学び、仕事の上でも外国語でやりとりする利点の一つではなかろうかと思うこの頃である。

注(1) 井上ひさし『ニホン語日記』「Janglishについて」文芸春秋社、平成5年。悔蔑的な響を持つJaplishに対して造られた言葉だそうだが、和製英語がかなり珍妙なことに変りない。

(2) フル・ネームはIsaac Maldonado Ibarraで、最後のIbarraは母方の姓。例えばゴンザレスのようにありふれた姓の場合、first nameと姓の組合せだと同姓同名が多数生れるが、これに母方の姓を加えると確定しやすいので合理的であるとの事。前出Daniel Claro Minica氏からきいた。

(3) かつて（昭和46～47年）経済審議会流通研究委員会、食品部会の主査をしていた時、「長話しの森」、「脱線の森」というあだ名を付けられたのは、委員長の上野幸七氏（関西電力）に代って毎回研究委員会に出られた上野錠二氏（関西電力）であった。英語だととてもそうはなれない。

＜編集後記＞

日本がキャッツ・フードをタイから多く輸入していることは知っていたが，タイの輸出企業が日本の猫の口に合うツナカンを作るために日本の猫を輸入して研究したというのには驚かされた。商品の品質競争が人間の世界だけでなく猫の世界にも及んでいたとは……。日本では外国牛肉と和牛肉の価格バリエーションが広すぎて，「牛肉が牛肉でない」という。確かにほぼ同じ味覚の牛肉でも，我々にとって外国牛肉は少し気味が悪く，高くても和牛肉を買いたいと思う人が多いだろう。所得が高まればなおさらであろう。これをみても国際商品市場の価格調整機能のむずかしさを考えさせられた。素人意見であるが，そもそも「日本の消費者はアメリカより何倍も高い牛肉（あるいは米）を食べさせられている」という議論はおかしいのではないだろうか。日本人の好みと，それにもとづく諸商品の相対価格こそが重要であるような気がする。

地球の裏側まで出かけていって講演なされた森所員，ご苦労様でした。　　(K.K.)

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