

Japan Wagyu Beef Market- Trend Analysis & Forecast to 2030

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Abstracts

Japan Wagyu Beef Market Overview

In 2023, Japan's Wagyu beef production reached 165.80 thousand tonnes, with 506.65 thousand heads of Wagyu cattle slaughtered. The domestic Wagyu beef market was valued at US\$ 10.98 billion. Despite its strong domestic production, Japan exported approximately 8 thousand tonnes of Wagyu beef to international markets. Japan meets 40% of its beef demand through domestic production, with the remaining 60% sourced from imports, primarily from Australia and the USA.

Japan is the birthplace of Wagyu, a breed renowned for its exceptional marbling, tenderness, and rich flavor. The country's Wagyu beef market is a critical part of its agricultural sector and holds a leading position in the global beef industry. Japan's breeding practices and culinary techniques set global standards, influencing the market worldwide and maintaining Wagyu's prestigious reputation.

Primary Areas/ Elements of Research & Analysis

The report provides comprehensive and valuable insights into the supply and demand dynamics of the Japan wagyu beef market. Below are the variables considered and analyzed in the report:

Supply-demand trends, market growth, and trade (exports & imports)

Market structure, conduct, and performance analysis

Historical and forecasted market size (volume & value)

Trade analysis, including key partners, quantities, values, and price trends

Supply chain mapping, pricing, and regulatory framework

Competitive landscape profiling major players

Factors influencing market performance, including sustainability trends

Report Coverage

The report provides historical market data (2015-2023) with projections to 2030, covering supply & demand analysis, trade patterns, and competitive dynamics. It also assesses key barriers, technological advancements, and industry evolution within the Japan Wagyu beef market.

Wagyu Beef Production & Demand Trends

Wagyu beef production in Japan blends traditional breeding practices with modern technological advancements. The quality of Japanese Wagyu is maintained through strict regulations and certification systems, ensuring that it meets the growing global demand. In 2022-2023, Japan's beef consumption reached 880.43 thousand tonnes, with 540.03 thousand tonnes imported, while domestic production increased by 3.96% to 340.40 thousand tonnes. Wagyu beef continues to grow in popularity, especially in high-end restaurants, luxury hotels, and among home cooks seeking premium ingredients.

Market Growth Drivers

Several factors are driving the growth of the Japan Wagyu beef market:

Rising Global Demand: Increasing global affluence and a preference for high-quality meats are boosting Wagyu beef consumption.

Culinary Tourism: Japan's thriving tourism industry further propels the demand for authentic Wagyu beef.

Health Consciousness: Growing awareness of the health benefits of leaner

Wagyu cuts is expanding the market.

Market Restraints & Challenges

While the Wagyu beef market is expanding, there are some challenges:

Limited Supply: The specialized breeding process and strict regulations make it challenging to meet rising demand.

Price Sensitivity: Wagyu's premium pricing makes it inaccessible to budget-conscious consumers.

Competition: Wagyu faces stiff competition from other premium meats, including Kobe and Angus beef, as well as from international Wagyu producers in Australia and the USA.

Supply Chain Bottlenecks

The supply chain for Wagyu beef faces several bottlenecks:

Breeding Regulations: Strict rules surrounding breeding practices limit the number of eligible cattle, affecting supply.

Premium Feed Availability: Wagyu cattle require specialized feed, and competition for these feed sources can drive up costs.

Processing Challenges: The butchering and aging processes require skilled labor and specialized facilities to maintain the beef's exceptional quality.

Price Setting Power

Japan has significant price-setting power in the global Wagyu market, with its prices often used as benchmarks worldwide. Japan's cautious approach to exporting Wagyu beef, including legislation to criminalize the unauthorized export of Wagyu sperm or eggs, helps protect its premium reputation. However, the premium nature of Wagyu beef means its prices are susceptible to market conditions and fluctuations.

Wagyu Beef Trade (Export & Import)

Japan exports approximately 7-8 thousand tonnes of Wagyu beef annually, with major markets in the USA, Australia, and Europe. Despite its domestic production, Japan imports a large portion of its beef to meet demand. Notable importers of Wagyu beef from Japan include Tajimaya UK (UK), Giraudi Group (Monaco), and Wagyu Master USA (USA).

Competitive Landscape

The Japanese Wagyu beef market is competitive, with various companies involved in the production, processing, and distribution of Wagyu beef. Leading players in the market include:

Kobe Livestock Co., Ltd.

S Foods Inc.

Miyazaki Wagyu

Matsusaka Beef

Starzen Co., Ltd.

Ohmi Beef

Kagoshima Wagyu

Gunma Wagyu

These companies are responsible for ensuring the health and productivity of Wagyu herds, maintaining stringent quality standards during processing, and distributing the premium beef to domestic and international markets.

Future Outlook

Japan's Wagyu beef market is expected to grow as global demand for premium meat

products continues to rise. The Japanese government plans to double Wagyu beef production to 300 thousand tonnes by 2035 to boost exports and address declining domestic demand. This strategy will require investments in breeding programs, technology, and infrastructure, as well as supportive policies to facilitate market access. With these efforts, Japan aims to maintain its leadership in the global Wagyu market while catering to evolving consumer preferences worldwide.

Scope of the Report:

Historical Years: 2015-2022

Base Year: 2023

Forecast Period: 2024-2030

Units: Value (US\$ Million) and Volume (Tonnes)

Report Coverage: Production, Consumption, Export, and Import

Segments Covered:

By Breed (Black Wagyu, Brown Wagyu, Shorthorn Wagyu, and Polled Wagyu)

By Cut Type (Chuck, Brisket, Sirloin, Round, and Others)

By Type (Domestic Produced and Imported)

By Sales (Domestic Consumption (Household and Food Service) and Exports)

Companies Profiled: The market players include, Kobe Livestock Co., Ltd., S Foods Inc., Miyazaki Wagyu, Matsusaka Beef, Starzen Co. Ltd., Ohmi Beef, Kagoshima Wagyu, Gunma Wagyu, Mie Matsusaka Meat Corporation Co., Ltd., NIKUJILLE, Itoham Food Inc. (Sankyomeat Inc.), ZEN-NOH International Corporation, and Others.

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