

Census analysis series No.9

Analysis of beef cattle management

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The number of Japanese cattle for breeding has begun to increase

Japanese beef production has seen a long-term decline in the number of cattle raised, largely due to the technical difficulties of increasing the scale of production and of encouraging new entrants into the industry, such that securing the necessary workforce has been challenging. This has occurred in the context of the aging population of Japan's small-scale cattle breeders. However, according to the latest Agricultural Census, the number of cattle raised has increased by 50,000 due to an increase in the price of veal calves and the setting of incentives for Japanese breeding cattle. The types of management that have contributed to this increase are analyzed below.

The management types are separated into six classifications: "Japanese cattle only," "Japanese cattle and other beef cattle," "Japanese cattle and dairy cattle," "Other beef cattle and dairy cattle," and "Other beef cattle only." "Japanese cattle only" is broken down further into "Breeding operation" which raises cows for breeding only, "Fattening operation" which involves only cattle in the process of fattening, and "Consistent management" which oversees both, for a total of eight different management classifications.

The table below presents the changes in the number of agriculture management entities and the number of Japanese cattle for breeding, according to the number of cattle raised, for the "breeding operation" and "consistent management" classifications. In the last five years, both management types have seen an increase in both the number of management entities and the number of cattle raised at large-scale operation ranges of 200–499 head of cattle and above 500 head of cattle. The growth in the number of cattle raised is particularly noticeable.

Conversely, the number of management entities and the number of cattle raised have continued to decline for both management types among small-scale operations of less than 20 head of cattle. However, "breeding operations" at the 20–49 head scale and "consistent management" operations at the 50–199 head scale have both begun to increase.

Table. Number of agriculture management entities and herd sizes, Japanese cattle breeding operations, and consistent management operations

	Herd size	Number of agriculture management entities (Management entities)			Breeding operations: Japanese cattle, number of cattle (1,000 cattle)			Rate of change, number of cattle (%)	
		2010	2015	2020	2010	2015	2020	2010-2015	2010-2015
Breeding operations: Japanese cattle	total	44,887	31,414	25,641	384	335	350	△12.8	4.5
	Less than 20 cattle	40,370	26,991	20,584	214	152	128	△28.7	△16.2
	20~49	3,746	3,522	3,895	108	104	115	△3.7	11.1
	50~199	743	865	1,105	53	63	80	19.0	27.3
	200~499	23	27	47	6	7	13	20.0	77.4
	More than 500 cattle	5	9	10	3	8	13	150.4	63.4
Consistent management: Japanese cattle	Less than 20 cattle	5,653	4,418	3,835	137	114	144	△16.4	26.3
	20~49	3,014	2,232	1,533	16	12	8	△25.6	33.9
	50~199	1,153	906	815	24	18	16	△23.9	10.8
	200~499	1,195	979	1,073	49	41	53	△16.5	27.8
	200~499	217	227	295	15	18	27	19.5	53.3
	More than 500 cattle	74	74	119	33	25	41	△22.5	60.1

Source: Compiled by the author from the Census of Agriculture and Forestry survey data.

Note: (1) This data only includes agriculture management entities whose census responses could be connected for each relevant year.

Accordingly, the number of agriculture management entities and herd sizes do not match those found in the Census of Agriculture and Forestry Report(Agricultural Management Sector - Beef Cattle Sector).

(2) Herd sizes depend on the number of cattle raised, excluding veal calves.

Approximately half of the small-scale consistent management operations have switched to breeding operations

The above increase in the number of cattle has not only been influenced by the expansion of individual agriculture management entities but has also by the movement away from other management types and new participants in the industry. The figure below shows the changes in management types for various operation sizes between 2015 and 2020 and indicates several noticeable trends.

Firstly, of those entities engaged in “consistent management” and those that managed less than 20 cattle or between 20 and 49 cattle in 2015, between 40 and 50% had become “breeding operations” in 2020. Furthermore, approximately 10% of the “fattening operations” of categories above 50 head of cattle had become “consistent management” operations, likely because farmers running fattening operations have purchased cows for breeding to secure veal calves.

In addition, looking at the “Japanese cattle and other beef cattle” and “Japanese cattle and dairy cattle” management types of less than 20 head of cattle, the proportion management entities “breeding operation” or “no cattle” has increased. It can be surmised that small-scale management entities raising Japanese and other cattle have either become “breeding operations” or have closed.

Finally, approximately 10% of the “other” entities, that were not raising Japanese cattle in 2015 have now switched to one of the management types incorporating Japanese cattle, indicating an increase in the introduction of Japanese cattle.

(Analysis by OHASHI, Megumi)

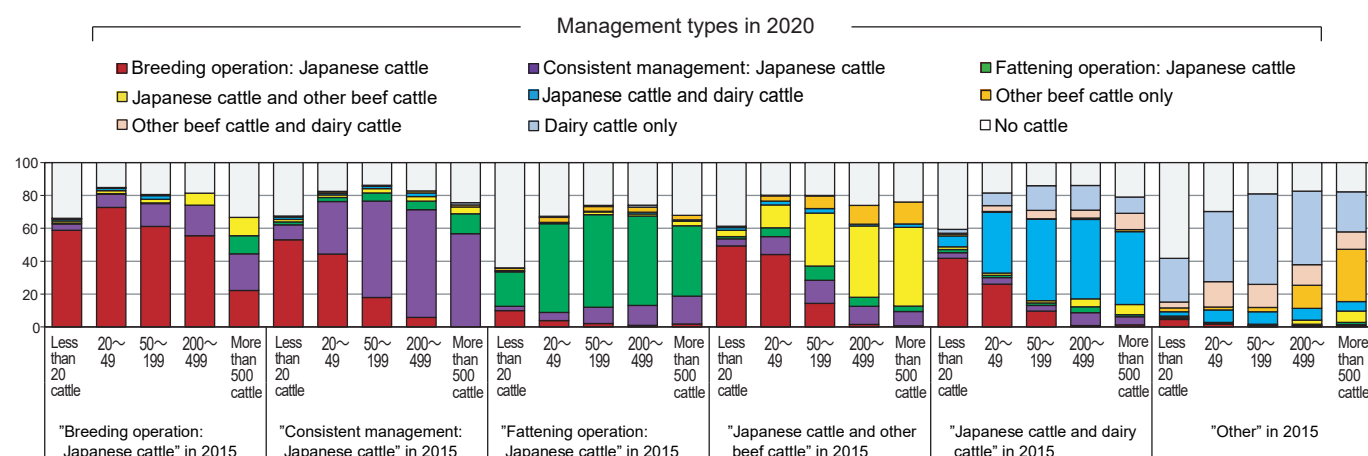


Figure. Changes in agriculture management entities within the main management types (by herd size) in 2015

Source: Compiled by the author from the Census of Agriculture and Forestry survey data.