

ANIMAL WELFARE GROUP COUNTRY PROFILE

JAPAN



KEY METRICS

(All figures are approximate)



POPULATION



9,346,000



15,959



3,822,000



14,798



11%

of land area is used for agriculture.



25%

of total agricultural output is livestock.



1,056,000

cattle slaughtered in 2018.

BEEF CONSUMPTION



20.9
kgs/capita
(46 lbs/capita)



The objective of the country profiles is to provide an overview of the animal welfare landscape and the differences between regions. The information provided is general in nature and a summary of facts, it does not represent the opinion of Leather Working Group. The country profiles are living documents, that are reviewed and updated from time to time. While Leather Working Group has taken due care to ensure the information is accurate as of the date of publication, the information is provided on an "as is" basis and we make no representation or warranty as to its accuracy. Please note that examples of high-quality and low-quality animal welfare can be identified in every region. Leather Working Group is not liable to any person for any loss suffered or incurred as a result of reliance on the information.

This publication and the information contained in is a resource intended only for LWG members and it may not be copied or shared without prior written permission. Any reproduction permitted in accordance with the Copyright Act 1988 shall acknowledge the Japan Country Profile as the source of any selected passage, extract, diagram, or other information.



SUMMARY OF KEY ISSUES

Transport

- Japan imports a significant number of live animals, most of which come from Australia by sea.
- Animal welfare risk is known to be higher for sea transport, and standards will be governed by Australian requirements.
- There is some legislation governing the transport of livestock within Japan, stipulating that transport conditions must be hygienic and safe.

Traceability

- Japan's bovine traceability system is one of the most advanced in the world, and allows consumers to identify the individual animal from which beef products originate.
- The traceability system for porcine animals is less well developed but remains of good quality.
- The extent to which these advanced traceability systems is applicable to leather remains unclear.

Slaughter

- A significant number of animals are slaughtered in Japan, and there is a legislative requirement that animals are pre-stunned.
- Little unregistered slaughter occurs in Japan, and Halal slaughter is not commonplace.

Legislation

- There is legislation recognising animal sentience and outlawing the infliction of unnecessary harm.
- There are notable gaps in the legislation, for example relating to farm animals specifically, vehicle regulations, and maximum periods of travel.
- Japanese culture differs to western culture in the extent to which animals are valued.

Governance

- Infringements of animal welfare legislation is punishable by monetary fines or imprisonment.
- There is little evidence of corruption in Japan.

NGO Activity

- The concept of animal welfare is relatively new in Japan, and most NGOs are focused on companion animals and extreme events such as the Taiji dolphin drive
- Farm animal welfare receives very little attention.



Japan's geography means that it has a relatively small amount of land available for livestock grazing¹. As a result, intensive agricultural practices are undertaken in areas that can be farmed, and the country has a significant dependence on the import of animal-derived products (Japan is the world's 3rd largest beef importing country)². Livestock accounts for 25% of Japan's total agricultural output, and the most significant products are related to dairy, porcine meat, and bovine meat³. In contrast to the majority of Japan's agricultural products, sales in those derived from livestock have seen continued growth since 1960, partly due the westernisation of Japanese food consumption⁴. As a result, the average number of animals reared on cattle farms has grown to more than 30 head; 20 times more than in 1960, and the average pig farm now accommodates more than 1200 animals; 500 times greater than in 1960⁴. The average size of Japanese dairy farms has increased more than 17 times since 1965, and more than 200 times for farms rearing porcine species⁴. The Hokkaido prefecture is Japan's main livestock rearing region, containing 25% of the nation's arable area, and 21.5% of its livestock⁵. The average farm in Hokkaido is 17 times larger than those found elsewhere in Japan at 16.45 hectares, something which results in part from an absence of other industries competing with farms for land in the region⁴.

Japanese cattle farming focuses on three breeds: Wagyu, dairy and hybrid (produced by inseminating dairy cattle with semen from a male Wagyu)². Wagyu cattle comprise Japanese Black, Japanese Brown, Japanese Shorthorn, and Japanese Poll species². Japanese Black is the most common because it produces the highest quality meat⁶. Due to differences in the value of products from Wagyu and dairy/hybrid cattle, two distinctive farming systems have developed². Wagyu cattle are typically raised on breeding farms for the first nine months of life, before being sent to fattening farms for a further twenty months, at which point they are sent for slaughter². In the case of dairy and hybrid cattle, females are kept for the purposes of dairy farming, and may be sent for slaughter once milk yields begin to decline². Male dairy cattle and hybrids are sold to fattening farms or combined management farms (those undertaking breeding and fattening) at birth, before being sent to slaughter².

Japan contains more breeding than finishing farms, however finishing farms are usually larger in size². Moreover, farms rearing Wagyu cattle are typically smaller than those rearing dairy and hybrid cattle because farmers maximise their profits through improved meat quality, rather than increased production volumes². For that reason, on-farm profits are enhanced by focusing more effort on a smaller number of animals².

In 2018, total bovine slaughter was 1,056,000 animals (roughly 1/3 of total inventory) from which 475,000 tonnes of beef was produced⁷. An offtake rate of more than 30% is indicative of a highly developed and industrialised livestock rearing system. The country remains reliant on imports, and in 2018 beef imports totalled 865,210 tonnes, 51% of which originated from Australia and 41% from the USA⁷. Japan continues to place tariffs on beef imports, however in 2019 these were reduced to 26.6% for those countries involved in new trading agreements, namely the Trans-Pacific Partnership (CPTPP) which includes Australia, and the Japan-EU Economic Partnership Agreement (EPA)⁷. In comparison, tariffs are 38.5% for countries not included in these partnerships, meaning that products originating from countries covered by the CPTPP and EPA agreements are less expensive than those produced elsewhere⁷.

Japan imported 14,482 live dairy cattle in 2018, a number which has risen in recent years because the price of Japanese heifers is at a 5-year high⁷. Based on 2017 data, 97% of Japanese live bovine imports originated from Australia⁸. Japan does not export many live cattle, partly because the Wagyu species is one that Japanese farmers rear to a higher quality than in other countries.

The Japanese population derives more of its nutritional protein from pork than beef, and as a result the porcine population exceeds the bovine population by a ratio of nearly 3:1. In 2018, 1,284,000 tonnes of porcine meat was produced⁷. As with beef, Japan's domestic production is insufficient to meet domestic demand meaning that 1,481,000 tonnes of pork was imported in 2018⁷ (second highest quantity globally behind China⁹). 34% of this originated from the USA, while Canada and Mexico also contributed significant quantities⁷.

An ageing farmer population has led to a 6% reduction in the number of pig farmers since 2014 and there are now around 4,800 pig farms operating in Japan, most of which employ intensive farming strategies on an industrial scale¹⁰. There has been a particular reduction in the number of small- and medium-sized farms, meaning that the pig farming landscape has become increasingly centred on larger, industrialised facilities⁹.

Evidence specifically related to animal welfare of farm animals is not widely available, however there is some evidence that practices such as tail docking are legally permissible¹¹, as are veal crates and gestation crates¹². It is unclear whether there are any restrictions placed on practices such as hot branding, dehorning or mulesing. Available information suggests that farm animals are covered by some animal welfare legislation, but exempted from other elements that apply to companion animals¹³.



TRANSPORT

Japan imports a significant number of live animals, and given that the country is an island, this means that the majority are transported by sea. It is unclear whether Japan has passed any legislation explicitly focused on animal welfare in international transport, however Australia (the country from which Japan imports most of its live animals) has developed regulation for the export of live animals (Australian Standards for the Export of Livestock)¹⁴. The Standards provide guidance on how to establish whether an animal is fit for export (e.g. minimum body weight), and also suggest the most effective methods for loading livestock onto vessels, caring for animals during transit, and how to safely transport animals by air^{15,16}. While Australian legislation may lead to improved animal welfare standards during international transport, it remains unclear as to whether these standards are maintained once the animals enter Japan.

Live animals are also subject to internal transport in Japan, for example between breeding and finishing farms. The 'Standard about Breeding and Storage of Industrial Animals' (1987) establishes that there is a responsibility for those involved in the transport of livestock to ensure that suitable standards of hygiene and safety are maintained¹⁷. However, the legislation does not set specific rules regarding how such standards can be achieved, and an enforcement process does not appear to have been established¹⁷.

TRACEABILITY

Following the bovine spongiform encephalopathy (BSE) outbreak of 2001, Japan implemented an extensive traceability system that enables domestically produced beef products to be traced back to the individual animal from which they originated¹⁸. The system involves an animal being assigned a unique ten-digit identification code at birth which is attached to the animal via ear tag¹⁹.

Information regarding the animal's origin, locations on which it was raised, site of slaughter, and identification number of the animal's mother is stored centrally by the National Livestock Breeding Centre¹⁹. The ten-digit code is listed on every beef product sold within Japan, and there is an open-access online repository containing information for domestic cattle¹⁹. As such, it is possible for consumers to trace the entire life history of the bovine animal being consumed.

A traceability system exists for porcine species, although it is less developed than the bovine equivalent and focuses on tracing an animal's origin, locations of housing, and location of slaughter²⁰. Unlike the bovine system, there is no centrally held repository for this information, and the general public are not given access²⁰. In addition, participation with the porcine system is optional, while compliance with the bovine system is a legal requirement²⁰. Established in 2012, the porcine traceability system is overseen in part by the Japanese Pork Producers Association (JPPA) and while recent figures concerning participation are unavailable, 20% of JPPA members participated in the first year; a figure that is likely to have risen since²¹.

The Japanese beef traceability system is one of the most progressive and extensive systems available, however it is limited by its failure to account for imported products, and the system established for tracing porcine animals is less developed²². It remains unclear whether the traceability system will be extended in the future.



HIDES, SKIN & LEATHER

Japan exported US\$355 million of animal hides, skins and leather-based products in 2017⁸. Of this, US\$120.07 million was luggage (e.g. trunks and cases); US\$102.95 million was leather (excluding bovine and ovine) and US\$92 million was tanned bovine and equine hide⁸. Table 1 provides a summary of the key locations to which these products were exported⁸. While specific information regarding leather (excluding bovine and ovine) is not available, it is likely that the majority of this will be porcine, with some contribution by caprine and exotic leathers.

Table 1. Showing the key destinations of Japanese leather products

PRODUCT	EXPORT DESTINATION
Luggage (e.g. trunks and cases)	1. Hong Kong (15%)
	2. South Korea (12%)
	3. Myanmar (8.7%)
Leather (excl. bovine and ovine)	1. Thailand (70%)
	2. South Korea (4%)
	3. Vietnam (3.4%)
Tanned equine and bovine hides	1. China (34%)
	2. Hong Kong (16%)
	3. Thailand (14%)

Japan is a net importer of finished leather products. In 2017, the country imported US\$3.53 billion of luggage and US\$334 million of leather apparel, and China was the key source for both of these product types⁸.

The country is also a net importer of tanned bovine and equine hides. Of the US\$174 million Japan imported in 2017, 23% originated from Mexico, 17% from the USA, and 16% from Italy⁸. As such, some of the finished leather produced in Japan will originate from hides sourced elsewhere. In such instances the animal welfare risk will depend on the country in which the animal was raised and slaughtered.

Japan imports a significant amount of finished leather goods, and raw and semi-processed hides from Bangladesh⁸. Bangladesh has generally poor standards in animal welfare, meaning that there is additional risk associated with materials that originate from the country.

Based on the most recent figures, Japan produced 1071 million ft² of light bovine leather and 1.9 million ft² of light ovine and caprine leather in 2014²³. The country has seen a long-term decline in its domestic leather production, and light bovine leather showed a 60% reduction in production between 2000 and 2014²⁶. This reduction was 57% for light ovine and caprine leather²³.

SLAUGHTERING

1,056,000 bovine animals were slaughtered in Japan in 2018, while the figure for porcine animals was 16,430,000⁷. There are approximately 90 registered slaughterhouses in Japan, the largest of which has the capacity to process 350 animals per day²⁴. The slaughter process is covered by legislation stipulating that distress should be minimised as much as possible, and the Japanese Ministry for the Environment has established guidelines for ensuring the maintenance of animal welfare best-practice during slaughter¹³.

Prior to slaughter, all animals must first be rendered unconscious¹³. The most common method to achieve this is through percussion stunning, however the use of electric shock and carbon dioxide poisoning are also permissible¹³. Once the animal is desensitised, the animal is slaughtered through the process of exsanguination (a common slaughter technique that involves the cutting of an animal's throat and the draining of its blood)¹³.

Islam is a minority religion in Japan, and the country's total Muslim population is estimated to be between 70,000 and 120,000 people²⁵. Figures regarding the prevalence of halal slaughter in Japan are not widely available, however there are ongoing efforts to develop the Japanese halal food industry as a means of attracting a greater number of Muslim tourists²⁵. As such, it can be assumed that there is some halal slaughter undertaken in Japan.

LEGISLATION & REGULATION

The Act on the Welfare and Management of Animals (1973) sets the standard regarding animal welfare in Japan¹³. The legislation and its subsequent amendments recognise animal sentience and make it a criminal offence to kill, injure, or inflict needless suffering to, among other species, cattle, pigs, sheep, goats and horses¹³. Additional legislation exists for key animal welfare risk areas such as transport and slaughter.

The Shinsu Comfort Livestock Farm Certification Standard was released in 2007 and approves farms that meet certain standards of best practice (e.g. livestock rearing)¹. Distinctions are made for the individual needs of different livestock, including dairy cattle, beef cattle, and pigs¹. It is noted that the standards are not a legal requirement and are relatively undeveloped in comparison to those found in areas such as the EU, however they reflect the emergence of efforts to improve animal welfare standards in Japan¹.

Critics of Japanese animal welfare legislation note that its coverage is undeveloped, as evidenced by the absence of clear, specific guidance regarding issues such as the maximum time an animal can spend in transit, and space allowances¹. Equally, the majority of recent regulatory developments in the area of animal welfare are focused on companion animals such as cats and dogs, and legislation solely focused on farm animals does not exist^{25,12}.

GOVERNANCE

Infringements of the Act on the Welfare and Management of Animals (1973) are punishable with monetary fines, or in more severe cases, a 1-year prison sentence¹³. Instances of abandonment and cruelty by neglect may also be punished by monetary fines¹³. While there is the capability to punish instances of legislative violation, figures regarding the frequency with which such cases are pursued remains unclear. Similarly, guidance regarding slaughter and transport is covered by legislation that sits outside the jurisdiction of the Act on the Welfare and Management of Animals, and it is unclear whether there is a system by which misconduct is punished.

Transparency International's Corruption Perceptions Index is used as a means of gaining an objective appraisal of national governance²⁶. Japan is ranked as the 18th least corrupt country worldwide, a ranking which places it level with the Republic of Ireland and Estonia²⁶. As a result, it can be confidently asserted that there is an effective system of governance in Japan.

NGO ACTIVITY

The concept of animal welfare is relatively new in Japan. There is an assumption that consumers will begin to become more concerned with issues of animal welfare, however currently the public awareness of such issues remains limited^{25,27}.

There are a number of animal welfare advocacy groups operating in Japan, however most are focused on defending companion animals (e.g. cats and dogs) and certain practices that are the subject of international condemnation (e.g. Taiji dolphin drive)²⁵. Very few organisations are explicit in attempting to raise awareness of farm animal welfare issues (e.g. gestation crates).

Cultural perceptions towards animal welfare differ to many western attitudes, for example there is widespread international condemnation of the commercial whaling industry that remains legal in Japan.

FARM ASSURANCE SCHEMES

The Japanese authorities offer a number of schemes to support cattle farmers. A particular focus is on dairy farmers whose products are of less value, and subject to more international competition than Wagyu farmers⁴. For example, both national and local governments have set minimum price thresholds below which dairy farmers income is supplemented⁴.

The premium cost of Wagyu beef is justified by its quality, and the Japanese authorities have made efforts to ensure that products which originate from Japan can be differentiated from those produced elsewhere, and for that reason, domestic products can display the 'Unified Wagyu Logo'²⁸. Furthermore, Calf Registration Certificates are provided to those animals that are found to meet a minimum required standard with regards to quality, pedigree and provenance²⁹. Certification is viewed as a mechanism by which the standards of Wagyu products can be protected, and export prices maximised²⁹. Beef products are inspected post-slaughter and are graded according to standardised guidelines by an independent third party³⁰. The grading is listed on all products destined for export³⁰.



REFERENCES

Web links used as part of the research for this document are included below; due to the dynamic nature of web resources, accessibility to resources may change.

Where web links have been viewed as part of the research for this document the date accessed is logged. Documents may have been accessed over a period of four to six weeks however most recent view date is provided.

1. Seo, T., 2011. On-Farm Assessment of Animal Welfare in Japanese Dairy Cattle. JIFS, 8 : 35-40.
2. Godo, Y., 2014. The Beef Market and Beef Cattle Farmers in Japan [online]. Available at: http://ap.ftc.agnet.org/ap_db.php?id=279
3. ERS/USDA, 2014. Crops and Livestock in Japan [online]. Available at: <http://beef2live.com/story-crops-livestock-japan-0-108949>
4. OECD, 2009. Evaluation of Agricultural Policy Reforms in Japan [online]. Available at: <http://www.oecd.org/japan/42791674.pdf>
5. Government of Hokkaido Department of Agriculture, 2019. Agriculture in Hokkaido Japan [online]. Available at: http://www.pref.hokkaido.lg.jp/hsi/genjyou_english_3101.pdf
6. Wagyu International, 2013. A description of the Wagyu beef cattle breed [online]. Available at: <http://www.wagyuinternational.com/wagyu.php>
7. Imaizumi, A., 2019. Japan: Livestock and Products Semi-Annual [online]. Available at: https://gain.fas.usda.gov/Recent%20GAIN%20Publications/Livestock%20and%20Products%20Semi-annual_Tokyo_Japan_3-1-2019.pdf
8. The Observatory for Economic Complexity, 2019. Japan [online]. Available at: <https://atlas.media.mit.edu/en/profile/country/jpn/>.
9. Strak, J., 2016. Japan's market for imported pork is large [online]. Available at: <https://www.pigprogress.net/Finishers/Articles/2016/11/Japans-market-for-imported-pork-is-large-2909811W/>
10. Hunt, J., 2016. Agricultural Aftershocks: How Japan is Combatting a Decline in Farming [online]. Available at: <https://modernfarmer.com/2016/03/urban-farms-japan/>.
11. Nogami, F., 2002. A drastic change of agriculture in Japan. Available at: <http://www.alive-net.net/english/en-farm/farm-welfare.html>
12. ESDAW, n.d. Society and Animal Welfare – Japan [online]. Available at: <http://www.esdaw.eu/society-and-animal-welfare---japan.html>
13. World Animal Protection, 2014. Japan [online]. Available at: <https://api.worldanimalprotection.org/country/japan>
14. Animals Australia, 2010. Australia – New transport laws [online]. Available at: https://www.animalsaustralia.org/media/in_the_news.php?article=1246
15. Australia Government Department of Agriculture, 2019. Review of the Australian Standards for the Export of Livestock [online]. Available at: <http://www.agriculture.gov.au/animal/welfare/export-trade/review-asel>
16. Australia Government Department of Agriculture and Water Resources, 2018. Review of the Australian Standards for the Export of Livestock [online]. Available at: <http://www.agriculture.gov.au/SiteCollectionDocuments/animal/review-asel-working-draft-standard.pdf>
17. Government of Japan Ministry of the Environment, n.d. Standard about breeding and storage of industrial animals [online]. Available at: <http://www.env.go.jp/hourei/18/000113.html>
18. Charlebois, S., Sterling, B., Haratifar, S., et al., 2014. Comparison of Global Food Traceability Regulations and Requirements. Comprehensive Reviews in Food Science and Food Safety, 13: 1104-1129.
19. Godo, Y., 2015. The Beef Traceability System in Japan [online]. Available at: http://ap.ftc.agnet.org/ap_db.php?id=530.
20. Clemens, R., 2003. Meat Traceability in Japan [online]. Available at: https://www.card.iastate.edu/iowa_ag_review/fall_03/article2.aspx.
21. Shiota, T., n.d. Traceability of pork in Japan [online]. Available at: <http://www.angrin.tlri.gov.tw/English/2014Swine/p131-134.pdf>.
22. Food and Agriculture Organization of the United Nations, 2016. World statistical compendium for raw hides and skins, leather and leather footwear 1999-2015 [online]. Available at: <http://www.fao.org/3/a-i5599e.pdf>
23. T. Gotoh, H. Takahashi, T. Nishimura, K. Kuchida, H. Mannen, Meat produced by Japanese Black cattle and Wagyu, Animal Frontiers, 4(4): 46-54
24. Yildirim, C., 2015. Muslim population in Japan increases with Islamic demands [online]. Available at: <https://www.dailysabah.com/asia/2015/05/31/muslim-population-in-japan-increases-with-islamic-demands>
25. Kozuka, J., 2014. Animal Welfare in Japan Improving [online]. Available at: <https://japantoday.com/category/features/lifestyle/>



REFERENCES CONTINUED

- animal-welfare-in-japan-improving
26. Transparency International, 2019. Corruption Perceptions Index 2018 [online]. Available at: <https://www.transparency.org/cpi2018>
 27. Shoji, K., 2007. Japanese concept and government policy on animal welfare and animal experiments. AATEX 14, Special Issue, 179-181.
 28. Japanese Livestock and Export Council, n.d. Wagyu (Japanese Beef) [online]. Available at: <http://jlec-pr.jp/beef/unified-logo>
 29. Japanese Livestock and Export Council, n.d. Safety and high-quality beef from farm to table [online]. Available at: <http://nbkpro.com/beef/traceability/index2.html>
 30. Wagyu International, 2013. Wagyu around the World – Japan [online]. Available at: http://www.wagyuinternational.com/global_Japan.php

Front Cover Statistics

- Food and Agricultural Organisation of the United Nations, n.d. Japan [online]. Available at: <http://www.fao.org/countryprofiles/index/en/?iso3=JPN>
- Food and Agricultural Organisation of the United Nations, n.d. Live Animals [online]. Available at: <http://www.fao.org/faostat/en/#data/QA>
- Cook, R., 2019. World Beef Consumption Per Capita (Ranking of Countries) [online]. Available at: <http://beef2live.com/story-world-beef-consumption-per-capita-ranking-countries-0-111634>

Leather Working Group

T: +44 (0)1604 679800
E: info@leatherworkinggroup.com
www.leatherworkinggroup.com

The Pinnacle
170 Midsummer
Boulevard Milton Keynes
Buckinghamshire
MK9 1FE
United Kingdom

