

Western Europe, North America and South East Asia were the three leading sources of meat processing machinery. The value of imports from these regions were ¥2 225 million, ¥697 million and ¥59 million respectively. The dominance of Western Europe and North America as major suppliers is due to the long-established ties between West European meat processing machinery manufacturers and Japanese meat processors and the world-renowned tradition of meat processing in Europe and North America.

Meat processors rely almost exclusively on trading house to supply imported machines. Their proven capabilities in installation, after-sales support and maintenance service are considered to be reliable. Even in cases where a processor finds a new machine at a trade exhibition, he or she will request that a trading house handle the importation process.

According to industry sources, the top suppliers of imported industrial meat processing machinery are Kyokuto Boeki, Nakamura Sangyo and C. Itoh & Co. Other suppliers include Kaigai Tsusho, Terada Trading, Marubeni, Itoman Trading, The Tosho Co., Siber Kikai, and Okura & Co.

According to industry sources, the top importers of smoke houses and the foreign manufacturers they represent are Lieberman (Fessmann); Higashimoto Kikai (Autotherm); Onward (Maurer); Japan Provision (Reiche); Itoman & Co. Ltd. (Germos); and Higashiyama (Atmos).

## Exports

In 1988, Japan's meat processing machinery exports were ¥646 million, up 9 per cent over the previous year (see Table 8). South East Asia accounted for 67 per cent of these exports, Western Europe 16 per cent, North America 14 per cent, and the remaining 3 per cent by other regions. South East Asia's sizeable share of exports can be accounted for by increased expansionary efforts in this region by domestic meat processors.

**Table 8**

### Meat Processing Machinery Exports

Year	Value (¥ million)
1984	761
1985	1 751
1986	790
1987	592
1988	646

Source: Ministry of Finance.

### Machinery Selection Criteria

- *Reputation.* Switzerland is traditionally recognized as the main source for quality slicers while West Germany is renowned for its smoke houses.
- *Compactness, multi-functionality and cost efficiency.* At the industrial level, meat processing production lines are far from systematic when compared to their western counterparts. Consequently, industrial processors prefer equipment that is compact, multi-functional and cost-efficient — the latter two characteristics are of particular importance in view of the short shelf-life of processed meat products.
- *Small-lot production.* Japanese product labels carry both production and expiry dates. Consumers tend to base purchases on the former date, selecting "newer" products over "older" ones. Therefore, industrial processors must be capable of daily, small-lot production of a variety of products.
- *Pre-testing.* Industrial meat processors prefer to test new machines in their research and development sections prior to ordering to determine compatibility with existing production lines.