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# **Report Name:** Grain and Feed Annual

**Country:** Japan

**Post:** Tokyo

**Report Category:** Grain and Feed

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**Report Highlights:**

FAS Tokyo projects Japan's overall demand for feed grain to remain robust in MY2021/22 and MY2022/23 as livestock production expands. FAS Tokyo anticipates corn imports to decrease in MY2021/22 and MY2022/23 as feed millers increase the ratio of low-cost rice at the expense of corn in compound feed. FAS Tokyo estimates reduced food wheat imports for MY2021/2022 as Japan's contracting population and declining per capita wheat consumption, coupled with increasing domestic production, limits demand for imported wheat. FAS Tokyo projects an increase in MY2021/22 and MY2022/23 rice consumption as growing rice for feed consumption outpaces declines in table rice consumption. The Black Sea region is not a significant supplier of grain and feed to Japan.

**Executive Summary**

FAS Tokyo forecasts Japan's import dependent grain and feed market to remain largely stable despite uncertain grain supplies from the Black Sea region, ongoing global supply chain disruptions, and high global prices for grain. The Black Sea region is not a significant supplier of grains to Japan and Japanese importers do not anticipate substantial changes to total grain imports due to supply uncertainty in the region (Appendix Table 3). For contingency purposes, the Government of Japan stores approximately one million tons of rice and partially incentivizes storage costs for feed grains and imported food wheat. The Government of Japan does not intend to expand contingency grain reserves.

FAS Tokyo anticipates feed demand to remain robust throughout MY2021/22 and MY2022/23 to meet the needs of growing poultry flocks and swine herds (JA2022-0023 and JA2021-0122). In Japan, poultry and swine consume over 65 percent of compound feed. The poultry and swine sectors are rebuilding flocks and herds following sporadic avian influenza and classical swine fever outbreaks in 2021. Cattle inventories have increased over the last five years with support from MAFF to increase cattle herds and service the bullish *Wagyu* (Japanese cattle breed) beef exports.

FAS Tokyo anticipates corn imports to decline to 15.2 million tons in MY2021/22 and MY2022/23 as high corn prices push feed mills to increase rice in favor of corn in compound feed rations. Similarly, sorghum demand is expected to decrease in favor of rice. FAS Tokyo forecasts feed demand for barley and wheat to remain steady in MY2021/22 and MY2022/23.

FAS Tokyo projects wheat imports to fall to 5.3 million tons in MY2021/22 and MY2022/23 as declining population and contracting per capita consumption, coupled with increased wheat production, lowers demand for imported food wheat.

Table rice consumption continues to decline in Japan, resulting in high stocks and low prices in MY2020/21. Consequently, FAS Tokyo anticipates rice for feed consumption to grow and more than offset declines in table rice consumption in MY2021/22 and MY 2022/23.

## Corn

### Corn Production, Supply and Distribution

| Corn | 2020/2021 | | 2021/2022 | | 2022/2023 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Oct 2020 | | Oct 2021 | | Oct 2022 | |
| Japan | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Area Harvested** (1000 HA) | 1 | 1 | 1 | 1 | 0 | 1 |
| **Beginning Stocks** (1000 MT) | 1386 | 1386 | 1469 | 1419 | 0 | 1375 |
| **Production** (1000 MT) | 4 | 5 | 5 | 6 | 0 | 9 |
| **MY Imports** (1000 MT) | 15479 | 15478 | 15600 | 15200 | 0 | 15200 |
| **TY Imports** (1000 MT) | 15479 | 15478 | 15600 | 15200 | 0 | 15200 |
| **TY Imp. from U.S.** (1000 MT) | 11210 | 10972 | 0 | 0 | 0 | 0 |
| **Total Supply** (1000 MT) | 16869 | 16869 | 17074 | 16625 | 0 | 16584 |
| **MY Exports** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **TY Exports** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Feed and Residual** (1000 MT) | 11900 | 12000 | 12300 | 11800 | 0 | 11750 |
| **FSI Consumption** (1000 MT) | 3500 | 3450 | 3550 | 3450 | 0 | 3500 |
| **Total Consumption** (1000 MT) | 15400 | 15450 | 15850 | 15250 | 0 | 15250 |
| **Ending Stocks** (1000 MT) | 1469 | 1419 | 1224 | 1375 | 0 | 1334 |
| **Total Distribution** (1000 MT) | 16869 | 16869 | 17074 | 16625 | 0 | 16584 |
| **Yield** (MT/HA) | 4 | 5 | 5 | 6 | 0 | 9 |
| | | | | | | |

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

## Production

Japanese corn for grain production is negligible but has steadily increased in recent years. In MY2021/22, Japanese corn production totaled 6,477 tons on 992 hectares, up 23 percent and 26 percent respectively from the previous year. FAS/Tokyo forecasts MY2022/23 production and area harvested to expand to 8,500 tons and 1,300 hectares respectively. The Ministry of Agriculture, Forestry and Fisheries (MAFF), in response to surging prices for imported corn, increased support payments for grain corn produced in paddy fields. Growers typically use the corn on farm for animal feed or sell it locally.

## Consumption

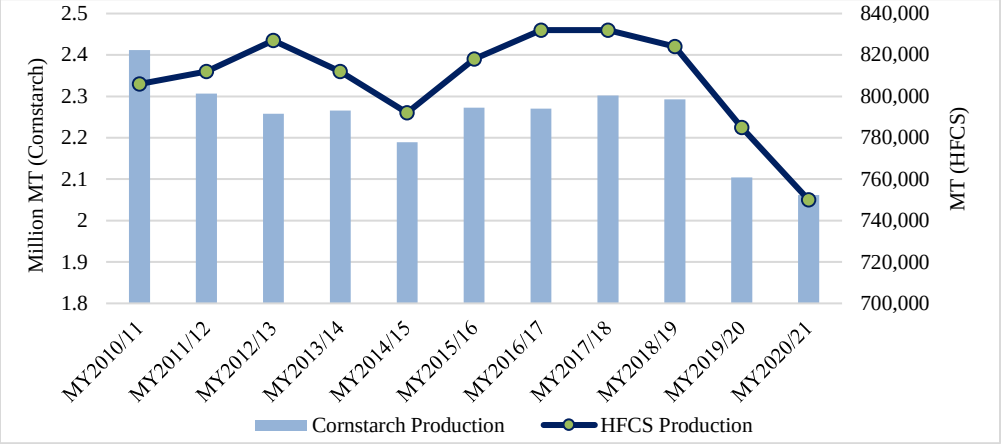
*FSI Consumption*

FAS Tokyo revised both the MY2020/21 and MY2021/22 Food, Seeds and Industrial (FSI) consumption estimate down to 3.45 million tons as corn starch demand remains sluggish. MY2020/21 corn starch production declined two percent from the previous year, an approximately 60,000 tons corn equivalent decrease (Chart 1). FAS Tokyo forecasts the MY2022/23 FSI consumption to increase slightly to 3.5 million tons reflecting a gradual recovery of cornstarch demand in line with an overall economic recovery in Japan.

In Japan, cornstarch accounts for approximately 90 percent of FSI consumption. Manufacturers use over half of the cornstarch to produce high fructose corn syrup (HFCS), half of which is then used for the manufacture of soft drinks. COVID-19 related restrictions have reduced demand for soft drinks in Japan, resulting in declining cornstarch production. FAS Tokyo anticipates cornstarch demand to remain weak in MY2021/22, but to gradually recover in MY2022/23 in line with an overall return to normal

economic activity. However, industry sources expect the preference of Japanese consumers for low-sugar and sugar-free drinks to hamper a full recovery in cornstarch demand to MY2018/19 levels.

**Chart 1. Japan Cornstarch and HFCS Production**




Source: MAFF

*Feed Consumption*

FAS Tokyo lowers its MY2021/22 corn for feed consumption estimate to 11.8 million tons as feed mills continue to increase rice as a substitute for expensive corn in compound feed production. FAS Tokyo forecasts MY2022/23 feed consumption to decline further to 11.75 million tons as feed mills continue to increase the ratio of rice in compound feed. Feed millers reduced corn in feed rations by 1.6 percent, to 11.6 million tons in MY2020/21 (Appendix Table 1).

Japanese feed mills have increased purchases of rice for feed at the expense of corn as its price per energy unit costs have become more price competitive.

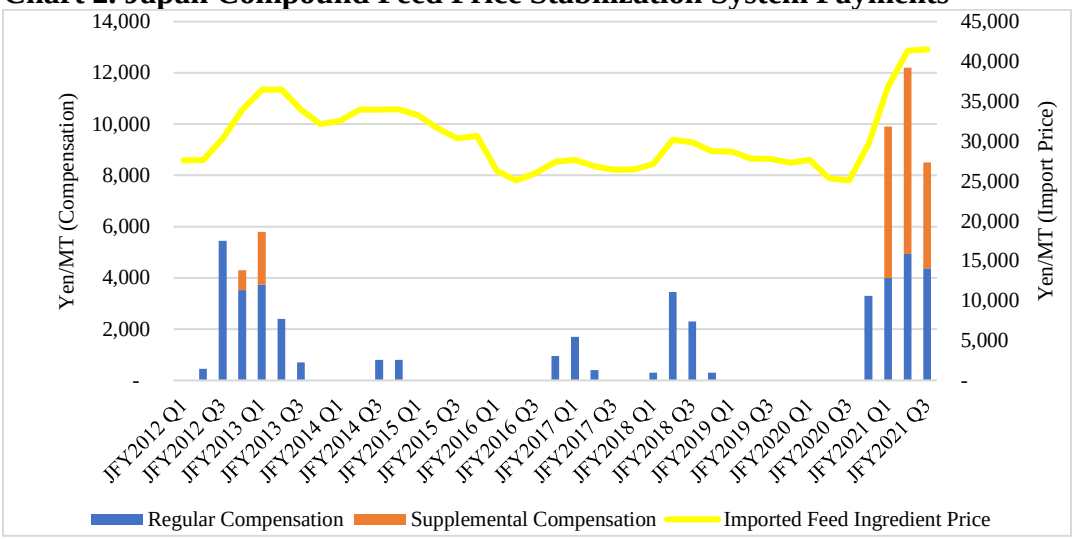
*Feed Prices*

Japan's feed self-sufficiency ratios for concentrates and roughage are 12 percent and 76 percent respectively, so feed millers rely heavily on imported feed grains. Over the last decade, corn has accounted for between 42 percent and 49 percent of the approximately 24 million tons of compound and mixed feed produced annually in Japan.

Increases in corn and oilseed prices, a weak Japanese Yen, and rising freight costs have led to a surge in feed prices. In October 2021, the average retail price of compound feed hit a record high, 20 percent higher than the previous year and has plateaued since then. To mitigate the impact of this cost increase, the "Compound Feed Price Stabilization System[1]" has provided livestock producers regular compensation payments since the January - March 2021 quarter and supplemental compensation since April - June 2021 quarter (Chart 2). Despite surging prices, livestock production continues to drive robust feed demand. However, overtime the compound feed price supports become less effective at keeping prices down and lingering high prices may have significant effects to Japan's livestock sectors.

[1] See JA2021-0128 for Compound Feed Price Stabilization System details.

**Chart 2. Japan Compound Feed Price Stabilization System Payments**



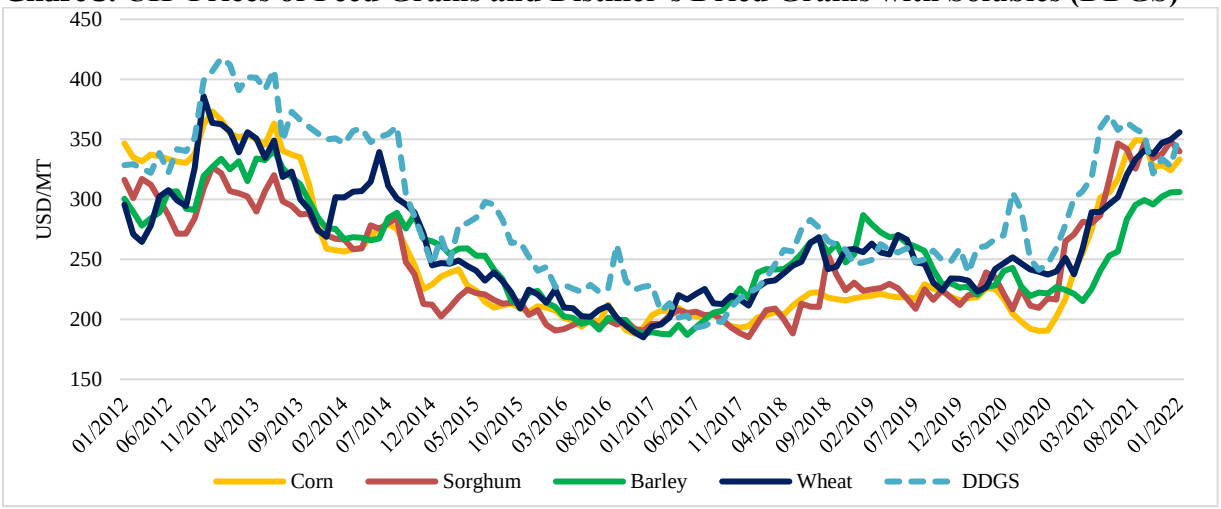

Source: MAFF

**Trade**

FAS Tokyo projects MY2021/22 imports at 15.2 million tons, reflecting projected declines for corn in feed consumption. FAS Tokyo forecasts MY2022/23 imports to remain at 15.2 million tons as a slight increase in FSI consumption balances out lower feed demand.

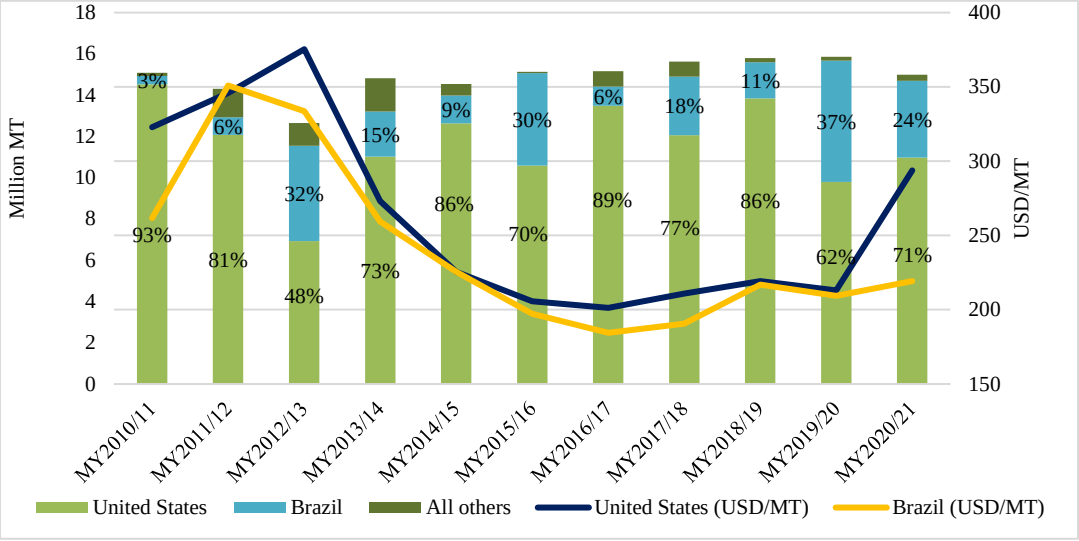
MY2020/21 corn imports decreased 2.6 percent to 15.48 million tons from the previous year as high prices and diminished economic activity decreased demand from feed mills and cornstarch manufacturers. In August 2021, the price of imported corn hit its highest amount since November 2012 and continues to hover near record prices (Chart 3). Despite a surge in U.S. corn prices, U.S. corn market share increased 9 percent, up to 71 percent in MY2020/21 (Chart 4). A weak Brazilian Real made Brazilian corn price competitive, but strong demand in Brazil and a smaller harvest curtailed Brazil's export availability and forced Japan to rely on increases U.S. corn purchases in MY2020/21.

**Chart 3. CIF Prices of Feed Grains and Distiller's Dried Grains with Solubles (DDGS)**




Source: Trade Data Monitor

**Chart 4. Japan Total Corn Imports**




Source: Trade Data Monitor

**Stocks**

FAS Tokyo estimates MY2021/22 ending stocks at 1.375 million tons and forecasts MY2022/23 ending stocks at 1.334 million tons, including approximately 850,000 tons of imported feed corn held by the private sector for which MAFF subsidizes storage costs as contingency reserves.

## Sorghum

### Sorghum Production, Supply and Distribution

| Sorghum | 2020/2021 | | 2021/2022 | | 2022/2023 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Oct 2020 | | Oct 2021 | | Oct 2022 | |
| Japan | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Area Harvested** (1000 HA) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Beginning Stocks** (1000 MT) | 37 | 37 | 26 | 26 | 0 | 26 |
| **Production** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **MY Imports** (1000 MT) | 299 | 299 | 320 | 250 | 0 | 200 |
| **TY Imports** (1000 MT) | 299 | 299 | 320 | 250 | 0 | 200 |
| **TY Imp. from U.S.** (1000 MT) | 30 | 37 | 0 | 0 | 0 | 0 |
| **Total Supply** (1000 MT) | 336 | 336 | 346 | 276 | 0 | 226 |
| **MY Exports** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **TY Exports** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Feed and Residual** (1000 MT) | 310 | 310 | 320 | 250 | 0 | 200 |
| **FSI Consumption** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Total Consumption** (1000 MT) | 310 | 310 | 320 | 250 | 0 | 200 |
| **Ending Stocks** (1000 MT) | 26 | 26 | 26 | 26 | 0 | 26 |
| **Total Distribution** (1000 MT) | 336 | 336 | 346 | 276 | 0 | 226 |
| **Yield** (MT/HA) | 0 | 0 | 0 | 0 | 0 | 0 |
| | | | | | | |

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Sorghum begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

### Production
Grain sorghum production is negligible.

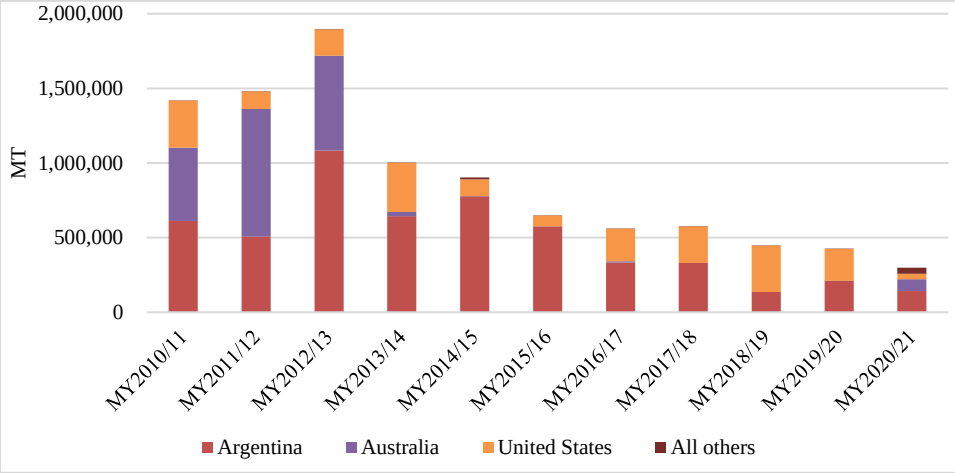
### Consumption
MY2020/21 sorghum use in compound feed declined due to high prices and a resulting shift from sorghum to rice (Annex Table 1). FAS Tokyo projects this trend to continue throughout MY2021/22 and MY2022/23 and for consumption to decrease to 250,000 tons and then to 200,000 tons.

Feed millers account for almost all sorghum use in Japan. Typically, feed mills use sorghum as a substitute for corn when price competitive. In addition to comparatively high import prices, sorghum shipments incur additional costs as it typically arrives in Japan on bulk vessels in mixed consignments and is then delivered to feed mills in smaller vessels.

### Trade

FAS Tokyo anticipates MY2021/22 and MY2022/23 imports at 250,000 tons and 200,000 tons respectively, in line with reduced demand for sorghum in feed. MY2020/21 sorghum imports fell 30 percent, to 299,443 tons, as high sorghum prices shrunk demand. In MY2020/21, Japan imported sorghum from Australia for the first time since MY2013/14, and Mexico and Brazil for the first time since MY2014/15 (Chart 5). Japan’s imports from the United States dropped 83 percent, to 24,291 tons, in MY2020/21 as U.S. sorghum exports to China reduced availability for Japanese importers.

**Chart 5. Japan Sorghum Imports**




Source: Trade Data Monitor

**Stocks**

FAS Tokyo projects MY2021/22 and MY2022/23 ending stocks to decline to 26,000 tons.

## Barley

## Barley Production, Supply and Distribution

| Barley | 2020/2021 | | 2021/2022 | | 2022/2023 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Oct 2020 | | Oct 2021 | | Oct 2022 | |
| Japan | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Area Harvested** (1000 HA) | 64 | 64 | 65 | 63 | 0 | 65 |
| **Beginning Stocks** (1000 MT) | 318 | 318 | 251 | 212 | 0 | 165 |
| **Production** (1000 MT) | 222 | 222 | 240 | 233 | 0 | 230 |
| **MY Imports** (1000 MT) | 1131 | 1132 | 1250 | 1200 | 0 | 1200 |
| **TY Imports** (1000 MT) | 1131 | 1132 | 1250 | 1200 | 0 | 1200 |
| **TY Imp. from U.S.** (1000 MT) | 16 | 0 | 0 | 0 | 0 | 0 |
| **Total Supply** (1000 MT) | 1671 | 1672 | 1741 | 1645 | 0 | 1595 |
| **MY Exports** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **TY Exports** (1000 MT) | 0 | 0 | 0 | 0 | 0 | 0 |
| **Feed and Residual** (1000 MT) | 1050 | 1080 | 1150 | 1100 | 0 | 1100 |
| **FSI Consumption** (1000 MT) | 370 | 380 | 380 | 380 | 0 | 380 |
| **Total Consumption** (1000 MT) | 1420 | 1460 | 1530 | 1480 | 0 | 1480 |
| **Ending Stocks** (1000 MT) | 251 | 212 | 211 | 165 | 0 | 115 |
| **Total Distribution** (1000 MT) | 1671 | 1672 | 1741 | 1645 | 0 | 1595 |
| **Yield** (MT/HA) | 3.4688 | 3.4688 | 3.6923 | 3.6984 | 0 | 3.5385 |
| | | | | | | |

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Barley begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

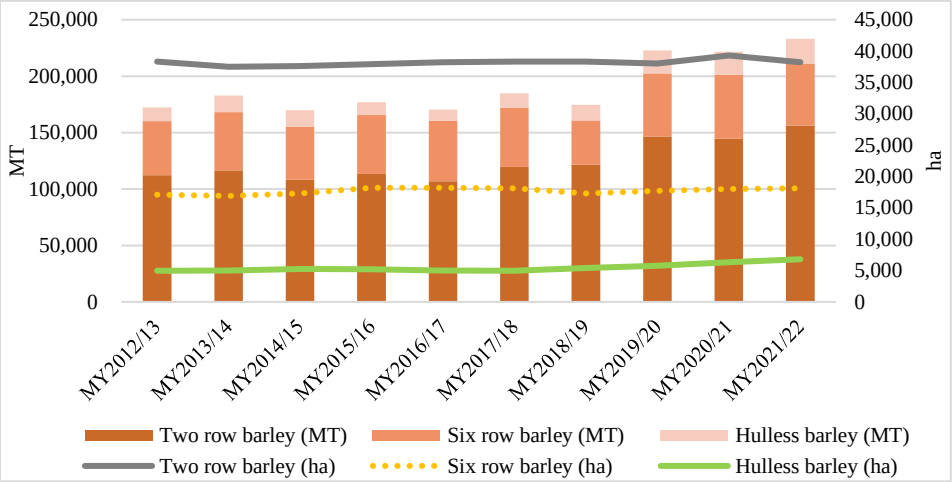
## Production

FAS Tokyo forecasts MY2022/23 barley area harvested to expand to 65,000 hectares and for production to total 230,000 tons, assuming a four percent yield decrease from record yields in MY2021/22. In MY2021/22, the area harvested decreased by 0.8 precent, to 63,110 hectares, but production increased 18.4 percent, to 233,000 tons, due predominantly to high yields for two row barley.

Pre-plant auction results for MY2022/23 crop in October 2021 indicate that producers plan to expand barley acreage. Japanese barley growers have had high yields for the last consecutive three years (Chart 6) and increased supplies lowered pre-planting auction prices for the MY2022/23 crop. Despite price declines, producers are shifting acreage from rice to barley in MY2022/23 due to the drop in prices for table rice and increases in MAFF support payments for barley production. Most barley is produced in paddy fields as part of a three-crop rotations along with rice and soybeans. In western Japan it is cultivated as a second crop after the rice harvest.

Favorable weather conditions, new seed varieties, and improved input application techniques have all contributed to improved barley harvests in recent years. Industry reporting shows that barley growers completed the 2021/22 MY planting season on time and under favorable weather conditions.

**Chart 6. Japan Barley Acreage and Production**




Source: MAFF

## Consumption

FAS Tokyo estimates MY2021/22 feed consumption to increase to 1.1 million tons based on projected marginal expansion of beef cattle inventories (JA2022-0023). FAS Tokyo forecasts MY2022/23 feed consumption to remain at 1.1 million tons.

Based on a five percent increase in barley used in feed rations, FAS Tokyo revised the MY2020/21 feed and residual consumption up to 1.08 million tons (Appendix Table 1). Barley is an essential ingredient for fattening and marbling beef cattle for Japanese *Wagyu* producers. MAFF support payment programs to increase cattle herds and bullish *Wagyu* beef exports have pushed expansion of beef cattle inventories over the last five years.

FAS Tokyo forecasts MY2021/22 and MY2022/23 FSI consumption to remain at 380,000 tons. FAS Tokyo raised the MY2020/21 FSI consumption estimate to 380,000 tons based on a 28 percent increase in Calendar Year (CY) 2021 barley tea production. In addition, to utilize increased domestic production, food manufactures are increasing incorporation of barley into an array of products, such as cereal, granola, energy bars, noodles, and flours to spur consumption.

In Japan, barley is used to make malt, *shochu* (distilled liquor), barley *miso* (fermented bean paste) barley tea, and rice extender. “Domestic Barley,” labels are a popular marketing tool for Japanese barley product manufactures and helps to drive demand for domestic barley. The number of craft beer products labeled with “malt produced from domestic barley” have also been on the rise as manufacturers try to differentiate their products in a growing marketplace. Japan imports nearly 90 percent of the malt needed for beer and spirits production. While overall beer consumption has been trending down, craft beer production has been growing in recent years, and industry sources expect demand for malt made from domestic barley to gradually increase in coming years (JA2021-0137).

## Trade

FAS Tokyo anticipates MY2021/22 imports to rise to 1.2 million tons as feed barley imports more than offset expected reductions in food barley imports. FAS Tokyo forecasts MY2022/23 imports to remain at 1.2 million tons.

In MY2020/21, an increase in domestic production lowered import demand, falling nearly 10 percent, to 1.13 million tons (Table 1). Food barley imports dropped 34 percent, and imports from the United States more than halved. Since mid-2016, demand for beta glucan rich glutinous barley has been on the rise. Initially, Japan imported glutinous barley, mainly from the United States and Canada, to meet demand. However, over the last 5 years Japan has also been increasing production of glutinous varieties, suppressing demand for imports.

FAS Tokyo forecasts feed barley imports to remain robust in MY2021/22 and MY2022/23. Australia and Canada are the dominant feed barley suppliers to Japan. When supply from these two countries is limited, Japan diversifies suppliers to secure amounts necessary to feed *Wagyu*. In MY2020/21, imports from Australia jumped 72 percent over the previous year, aided by high Chinese tariffs on Australian barley, Australia's recovery from drought leading to a return to normal production, and a below average barley harvest in Canada.

**Table 1. Japan Barley Imports (MT)**

| | MY2015/16 | MY2016/17 | MY2017/18 | MY2018/19 | MY2019/20 | MY2020/21 | Change |
|---|---|---|---|---|---|---|---|
| **Total** | **1,155,082** | **1,196,213** | **1,252,841** | **1,157,869** | **1,253,340** | **1,131,879** | **-9.7%** |
| Barley for feed | 923,980 | 949,919 | 960,658 | 916,018 | 980,906 | 952,315 | -2.9% |
| Australia | 566,195 | 917,666 | 797,920 | 249,708 | 520,463 | 893,379 | 71.7% |
| Canada | 23,531 | 0 | 50,579 | 570,001 | 299,918 | 58,936 | -80.3% |
| Russia | 40,820 | 16,558 | 4,592 | 16,061 | 0 | 0 | - |
| Ukraine | 186,049 | 10,233 | 87,389 | 67,011 | 0 | 0 | - |
| Romania | 37,753 | 1,159 | 19,130 | 13,227 | 62,043 | 0 | - |
| All others | 69,632 | 4,303 | 1,048 | 10 | 98,482 | 0 | - |
| Barley for FSI | 231,102 | 246,294 | 292,183 | 241,851 | 272,434 | 179,564 | -34.1% |
| Australia | 174,900 | 159,562 | 183,888 | 126,725 | 136,118 | 111,449 | -18.1% |
| Canada | 47,658 | 60,403 | 78,144 | 79,069 | 106,385 | 54,560 | -48.7% |
| United States | 6,431 | 24,069 | 27,972 | 35,910 | 29,813 | 13,537 | -54.6% |
| All others | 2,113 | 2,260 | 18 | 147 | 118 | 18 | -84.7% |

Source: Trade Data Monitor

## Stocks

FAS Tokyo projects MY2021/22 ending stocks to decline to 165,000 tons and to further decrease to 115,000 tons in MY2022/23.

## Wheat

## Wheat Production, Supply and Distribution

| Wheat | 2020/2021 | | 2021/2022 | | 2022/2023 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Jul 2020 | | Jul 2021 | | Jul 2022 | |
| Japan | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Area Harvested** (1000 HA) | 213 | 213 | 213 | 220 | 0 | 225 |
| **Beginning Stocks** (1000 MT) | 1205 | 1205 | 1048 | 1148 | 0 | 1028 |
| **Production** (1000 MT) | 1000 | 1000 | 1100 | 1130 | 0 | 1150 |
| **MY Imports** (1000 MT) | 5493 | 5493 | 5600 | 5300 | 0 | 5300 |
| **TY Imports** (1000 MT) | 5493 | 5493 | 5600 | 5300 | 0 | 5300 |
| **TY Imp. from U.S.** (1000 MT) | 2429 | 2469 | 0 | 0 | 0 | 0 |
| **Total Supply** (1000 MT) | 7698 | 7698 | 7748 | 7578 | 0 | 7478 |
| **MY Exports** (1000 MT) | 300 | 300 | 300 | 300 | 0 | 300 |
| **TY Exports** (1000 MT) | 300 | 300 | 300 | 300 | 0 | 300 |
| **Feed and Residual** (1000 MT) | 650 | 650 | 625 | 750 | 0 | 700 |
| **FSI Consumption** (1000 MT) | 5700 | 5600 | 5675 | 5500 | 0 | 5500 |
| **Total Consumption** (1000 MT) | 6350 | 6250 | 6300 | 6250 | 0 | 6200 |
| **Ending Stocks** (1000 MT) | 1048 | 1148 | 1148 | 1028 | 0 | 978 |
| **Total Distribution** (1000 MT) | 7698 | 7698 | 7748 | 7578 | 0 | 7478 |
| **Yield** (MT/HA) | 4.6948 | 4.6948 | 5.1643 | 5.1364 | 0 | 5.1111 |
| | | | | | | |

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2022/2023 = July 2022 - June 2023

## Production

FAS Tokyo forecasts MY2022/23 area harvested to expand to 225,000 hectares and for production to rise to 1.15 million tons, assuming a marginal decrease in yield after a record yield in MY2021/22. In MY2021/22, the area harvested increased 7,500 hectares to 220,000 hectares, and production was up 12 percent, to 1.12 million tons, due to a 10 percent yield increase. In addition to favorable weather, improved varieties and input applications have led to bumper crops.

Three consecutive years of large harvests have increased supplies and lowered pre-planting auction prices for the MY2022/23 crop. Despite auction price declines, industry sources indicate that producers have increased planned wheat acreage in MY2022/23 due to increased MAFF support payments for wheat grown in paddy fields combined with a drop in table rice prices. Paddy fields accounted for 5,000 of the 7,500 hectares increase in area harvested in MY2021/22.

Hokkaido, the northern island of Japan, is the major wheat producing region, accounting for nearly 60 percent of national acreage and 66 percent of national production. In Hokkaido, producers grow wheat in a three-crop rotation with potatoes and sugar beets or a four-crop rotation with the addition of beans, mostly in upland fields. Producers plant most the remaining acres throughout Japan in paddy fields in rotation with rice and soybeans. Paddy and upland fields make up 55 percent and 45 percent respectively of national wheat acreage. This composition has not changed over the last decade while wheat acreage has increased five percent, to 220,000 hectares. FAS Tokyo expects wheat acres to continue to grow as producers look to meet demand for domestic wheat and take advantage of MAFF support programs.

**Consumption**

FAS Tokyo lowered the MY2021/22 FSI consumption estimate to 5.5 million tons based on Japan's declining population, diminishing per capita consumption, and weak demand from the food service and tourism industries. FAS Tokyo forecasts MY2022/23 FSI consumption to remain at 5.5 million tons as high wheat prices lead to dampened demand for retail food products, nullifying a projected recovery in food service and tourism demand. FAS Tokyo revised MY2020/21 FSI consumption estimate down to 5.6 million tons based on a drop in wheat flour sales.

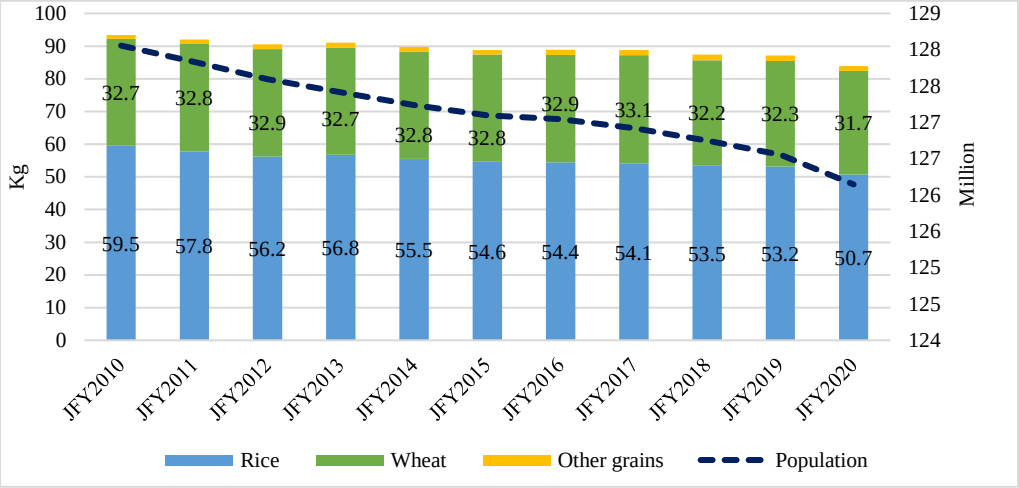
Wheat flour sales decreased 2.5 percent, to 4.48 million tons, in MY2020/21 following a 0.5 percent decrease in MY2019/20. Japan's population has been decreasing annually at 0.2 percent since 2011, and per capita wheat consumption has dwindled since MY2018/19 in favor of higher protein diets (Chart 7). In addition, weak demand from the food service and tourism sectors further suppressed FSI demand. The pasta boom that developed during Japan's COVID-19 related movement restrictions and restaurant closures has since cooled. Pasta consumption surged by 20 percent in CY2019 and CY2020, but CY2021 consumption returned to CY2018 levels.

Prospects for a MY2021/22 FSI consumption recovery are bleak as rising wheat prices coincide with the Government of Japan reinstituting a COVID-19 quasi state of emergency in many prefectures in late January 2022.

Food wheat is a state-traded product and MAFF sells imported wheat to flour mills at prices MAFF sets semi-annually. MAFF bases their price on international wheat prices, freight costs, and exchange rates over the previous six months. MAFF raised the average sales price for the April – September 2022 window for the five classes of wheat to 72,530 yen ($636)[2] /ton, a 17.3 percent increase from the previous six months, and a 39.7 percent increase from a year ago.[3] MAFF explains this increase will raise the retail price of a loaf bread by 1.5 percent and wheat flour by 4.4 percent. Manufacturers usually change their product prices three months after MAFF revises the sales price. Retail prices of flour-based products have been on the rise since December 2021 (Chart 8). Industry sources expect retail prices to continue to rise as uncertainty about the availability of Black Sea wheat on global market grows. FAS Tokyo anticipates this to further suppress FSI demand in MY2021/22 and MY2022/23.

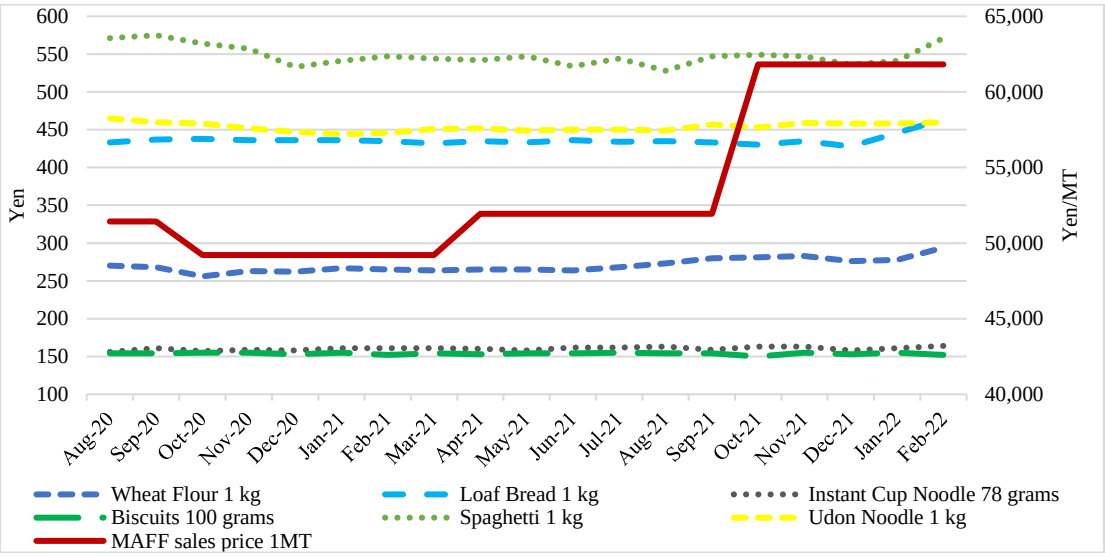
[2] The exchange rate used in this report is 114 yen/USD.
[3] U.S. Dark Northern Spring, U.S. Hard Red Winter, U.S. Western White, Canadian Western Red Spring and Australian Standard White.

**Chart 7. Japan Per Capita Grain Consumption and Total Population**




Source: MAFF, Ministry of Internal Affairs and Communications

**Chart 8. MAFF Wheat Sales Price and Retail Prices of Wheat Flour-Based Products in Japan**




Source: MAFF, Ministry of Internal Affairs and Communications

FAS Tokyo raised MY2021/22 feed consumption to 750,000 tons based on feed millers' robust use of wheat in the national compound feed formula so far this year (Appendix Table 1). FAS Tokyo anticipates MY2022/23 feed consumption to decrease to slightly 700,000 tons as inexpensive rice replaces some wheat in compound feed.

**Trade**

FAS Tokyo lowered the MY2021/22 imports to 5.3 million tons based on a five percent decrease in imports over the first seven months of the marketing year. Although strong, feed wheat imports are not on pace to offset weak food wheat and pasta imports. FAS Tokyo forecasts MY2022/23 imports to remain level at 5.3 million tons as FSI consumption remains sluggish.

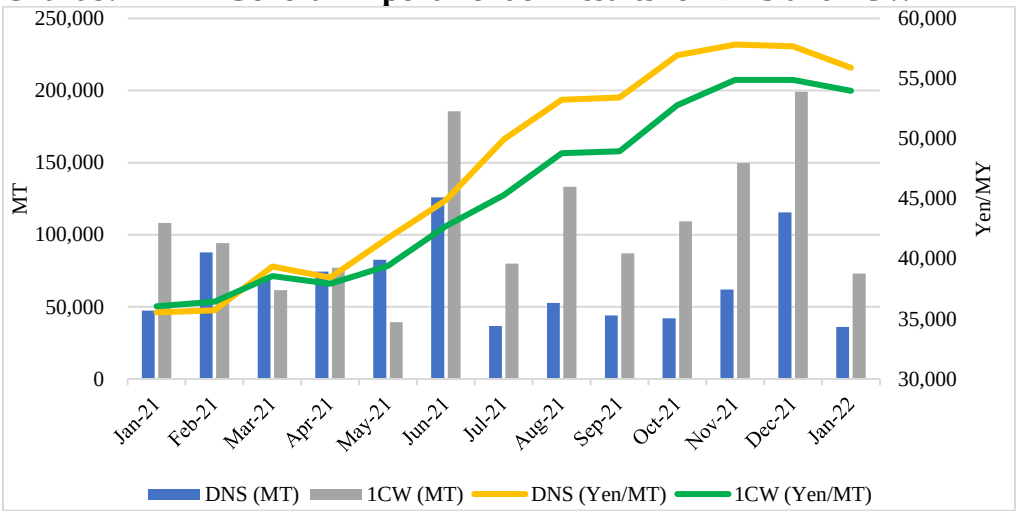
Japan imports of food wheat are predominantly from the United States, Canada, and Australia through the MAFF state-trading system. The five major classes of wheat account for most imports.[4] Over the first seven months of MY2021/22, food wheat imports fell 7.8 percent as declining consumption and increased domestic production lowered import demand (Table 2). Imports from the United States decreased 10 percent. Industry sources indicate that the decrease in U.S. wheat imports is due to the price difference between 1CW and DNS, both used for making bread. As Chart 9 shows, 1CW has been price competitive against DNS since March 2021 and more successfully bid than DNS in MAFF's general import tenders.

**Table 2. Japan Food Wheat Imports for July – January (MT)**

| | MY2019/20 | MY2020/21 | MY2021/22 | Change |
|---|---|---|---|---|
| Total | 2,910,132 | 2,847,482 | 2,625,126 | -7.8% |
| United States | 1,432,273 | 1,404,520 | 1,257,957 | -10.4% |
| Canada | 989,081 | 962,951 | 874,768 | -9.2% |
| Australia | 483,925 | 476,861 | 488,843 | 2.5% |
| All others | 4,853 | 3,150 | 3,558 | 13.0% |

Source: Trade Data Monitor

**Chart 9. MAFF General Import Tender Results for DNS and 1CW**




Source: MAFF

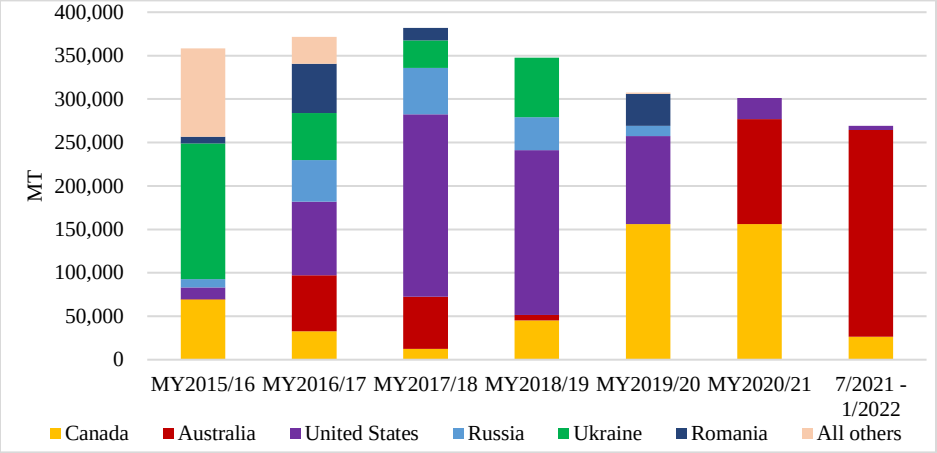
Unlike food wheat, Japan purchases feed grade wheat from a wider range of suppliers, including Ukraine and Russia (Chart 10). Imports from drought-recovered Australia increased in MY2020/21 and dominated the market for the first seven months of the marketing year. Industry expects rising prices of Australian wheat to slow down imports for the reminder of the marketing year.

FAS Tokyo anticipates MY2022/23 exports to remain steady at 300,000 tons. Hong Kong, Singapore, Malaysia, and China are Japan's major destinations. While wheat flour accounts for nearly 80 percent of

[4] U.S. Dark Northern Spring (DNS), U.S. Hard Red Winter (HRW), U.S. Western White (WW), Canadian Western Red Spring (1CW) and Australian Standard White (ASW).

Japan's exports, exports of pasta have gradually increased over the last six years. Japan does not assess a duty on imported wheat when it used in the manufacture of wheat flour, pasta, and biscuits for export.

**Chart 10. Japan Feed Wheat Imports**




Source: Trade Data Monitor

**Stocks**

FAS Tokyo estimates MY2020/21 ending stocks to be 1.018 million tons. FAS Tokyo expects MY2021/22 ending stocks to decrease slightly, to 978,000 tons. These privately-held stocks include a contingency stock of approximately 880,000 tons of imported food wheat, equivalent to 2.3 months of demand, for which MAFF subsidizes the storage costs for 1.8 months equivalent demand as contingency reserves.

## Rice

### Rice Production, Supply and Distribution

| Rice, Milled | 2020/2021 | | 2021/2022 | | 2022/2023 | |
|---|---|---|---|---|---|---|
| Market Year Begins | Nov 2020 | | Nov 2021 | | Nov 2022 | |
| Japan | USDA Official | New Post | USDA Official | New Post | USDA Official | New Post |
| **Area Harvested** (1000 HA) | 1533 | 1533 | 1526 | 1520 | 0 | 1510 |
| **Beginning Stocks** (1000 MT) | 1980 | 1980 | 1870 | 1937 | 0 | 1952 |
| **Milled Production** (1000 MT) | 7573 | 7570 | 7560 | 7640 | 0 | 7550 |
| **Rough Production** (1000 MT) | 10402 | 10398 | 10385 | 10495 | 0 | 10371 |
| **Milling Rate (.9999)** (1000 MT) | 7280 | 7280 | 7280 | 7280 | 0 | 7280 |
| **MY Imports** (1000 MT) | 647 | 647 | 685 | 685 | 0 | 685 |
| **TY Imports** (1000 MT) | 662 | 662 | 685 | 685 | 0 | 685 |
| **TY Imp. from U.S.** (1000 MT) | 314 | 320 | 0 | 0 | 0 | 0 |
| **Total Supply** (1000 MT) | 10200 | 10197 | 10115 | 10262 | 0 | 10187 |
| **MY Exports** (1000 MT) | 80 | 110 | 70 | 110 | 0 | 120 |
| **TY Exports** (1000 MT) | 80 | 110 | 70 | 110 | 0 | 120 |
| **Consumption and Residual** (1000 MT) | 8250 | 8150 | 8200 | 8200 | 0 | 8250 |
| **Ending Stocks** (1000 MT) | 1870 | 1937 | 1845 | 1952 | 0 | 1817 |
| **Total Distribution** (1000 MT) | 10200 | 10197 | 10115 | 10262 | 0 | 10187 |
| **Yield (Rough)** (MT/HA) | 6.7854 | 6.7828 | 6.8054 | 6.9046 | 0 | 6.8682 |
| | | | | | | |

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2022/2023 = January 2023 - December 2023

Note: This section assumes a milled rice basis unless otherwise noted.

### Production

FAS Tokyo forecasts MY2022/23 area harvested to be 1.51 million hectares, down 10,000 hectares from MY2021/22, and production to be 7.55 million tons, down 90,000 tons. The exit of aging farmers from rice production and MAFF's push to shift acreage out of table rice are driving acreage declines.

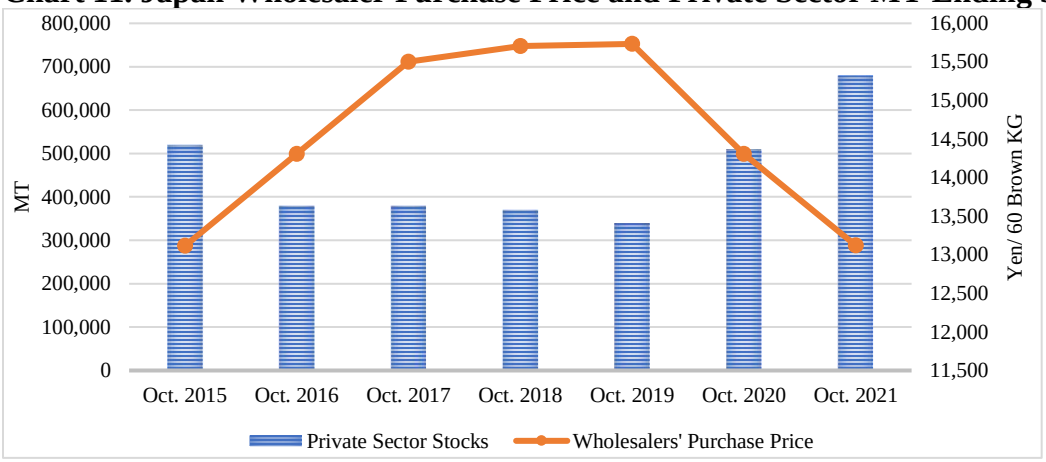
FAS Tokyo estimates the MY2021/22 national average yield to be 6.9 MT/ha, three percent higher than last year, with above average yields throughout Japan except in the Hokuriku region. The yield in Hokuriku was down 3.5 percent from the previous year as typhoons and a lack of sunshine hampered grain filling in August and September. Niigata Prefecture, in Hokuriku and Japan's largest rice producing prefecture, saw a 5.2 percent yield decrease. Producers in southwestern Japan (Kyushu, Shikoku, and Chugoku regions) dealt with typhoons, a prolonged rainy season, and a lack of sunshine in August, but weather recovered in time for improved yields. Hokkaido, the second largest rice producing prefecture, experienced favorable weather, promoting a 2.8 percent yield increase. The yield in Tohoku region was down slightly down from the previous year's bumper crop but still above average. FAS Tokyo raises its estimate for MY2021/22 production to by 0.9 percent, to 7. 6 million tons, despite a 0.8 percent decrease in are harvested to 1.53 million hectares. The quality of MY2021/22 crops is improved over the previous four years and MAFF classified 83.1 percent of the harvest as first grade.

Dwindling table rice consumption increased MY2019/20 private sector ending stocks to 510,000 tons (brown) (Chart 11). In response, MAFF raised support payments for producers to shift production from table rice to wheat, barley, soybeans, horticulture products, rice for exports, and rice for processing in

Japanese Fiscal Year (JFY) 2021.[5] Producers responded by shifting from table rice to feed rice. In MY2021/22, table rice area planted decreased by 63,000 hectares, to 1.3 million hectares, and the planted areas of feed rice increased 45,000 hectares, to 116,000 hectares (Chart 12). In many cases, producers planted table rice varieties and switched shipping destinations from table rice to feed rice despite an effort by MAFF to encourage high-yield varieties for feed rice to lower prices.

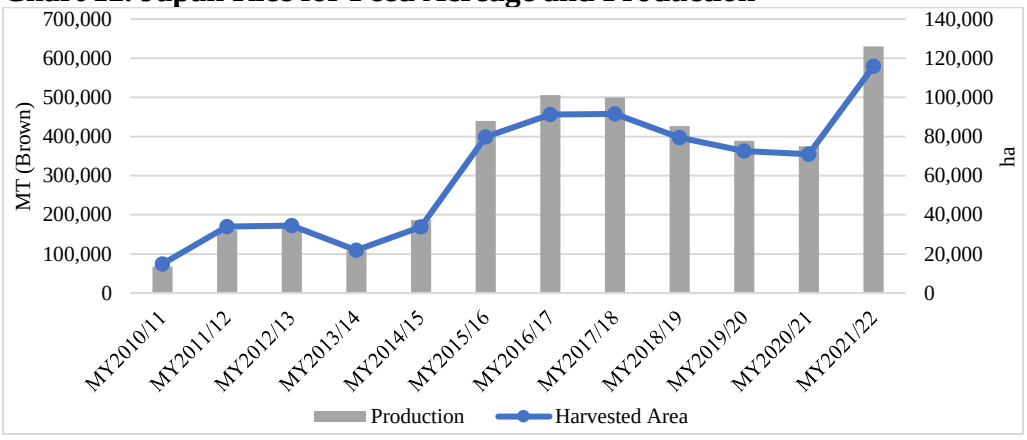
As table rice consumption continues to decline, MY2020/21private sector ending stocks increased further to 680,000 tons (brown). In JFY2022, MAFF again revised support payments to encourage acreage shifts to wheat, barley, soybeans, horticulture products, rice for exports, and rice for processing. However, many producers are unwilling to invest in equipment and inputs necessary to produce new crops, industry sources expect feed rice to remain the preferred alternative. In addition, demand for feed rice is on the rise and easy to commercialize. Accordingly, FAS Tokyo expects acreage to continue shifting from table rice to feed rice in MY2022/23, helping to maintain total rice acreage. In addition to increasing support payments to shift acres out of table rice, MAFF also increased support payments to store MY2021/22 crops in the JFY2022 budget (JA2022-0008).

**Chart 11. Japan Wholesaler Purchase Price and Private Sector MY Ending Stocks**




Source: MAFF

**Chart 12. Japan Rice for Feed Acreage and Production**




Source: MAFF

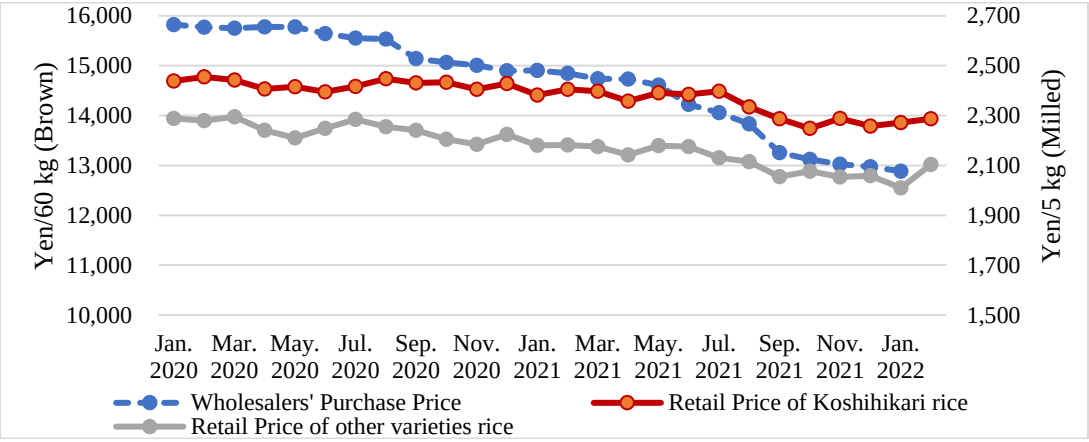
[5] Japanese Fiscal Year (JFY) runs from April 1 to March 31.

## Consumption

FAS Tokyo projects MY2021/22 total rice consumption to be 8.2 million tons, as increases in feed consumption offset declines in table rice consumption. FAS Tokyo forecasts MY2022/23 total consumption to rise to 8.25 million tons as rice for feed demand again outpaces the decline in table rice consumption. FAS Tokyo revised MY2020/21 consumption down to 8.15 million tons as MY2020/21 private sector ending stocks were larger than estimated.

Japan's shrinking population and per capita table rice consumption continues to drive declines in overall consumption of table rice (Chart 7). Bearish food service and tourism demand amid the COVID-19 pandemic has accelerated declines in table rice consumption, resulting in high stocks and lower prices (Chart 13). One bright spot for rice consumption is the growth in popularity of microwavable packaged rice, which rose 4.6 percent in CY2021. Manufacturers use approximately 950,000 tons (actual tonnage) of rice and imported rice flour preparations to produce products such as *sake* (rice wine), rice crackers, *miso*, rice flour, and glutinous rice cakes. Production for these products has been steady due to increased exports.

**Chart 13. Japan Table Rice Wholesaler Purchase Price and Retail Price for Table Rice**




Source: MAFF

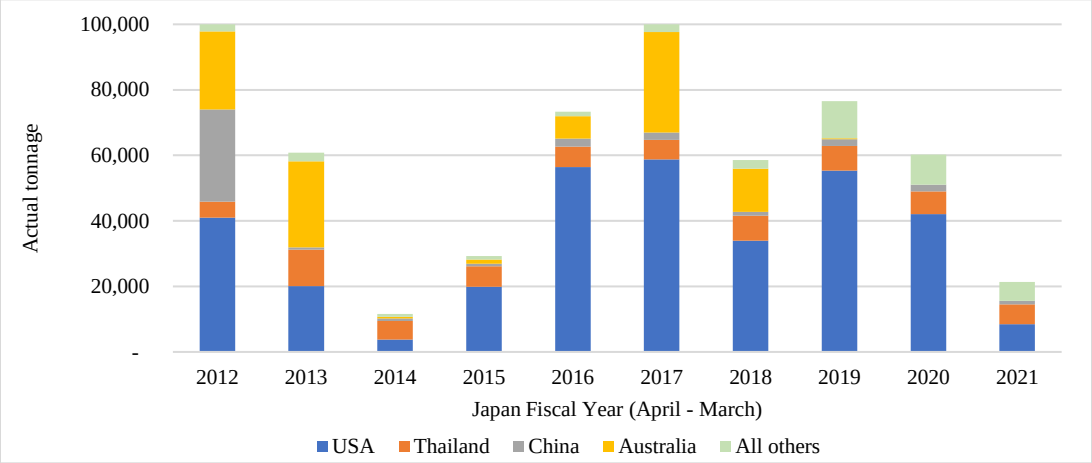
Rice for feed demand has been on the rise due to price competitiveness against corn. Rice used in compound feed production increased 26 percent, to 1.15 million tons (actual tonnage), in MY2020/21. Feed mills use a mix of domestic rice for feed, government contingency reserve rice[6], and imported WTO Minimum Access (MA) rice to meet demand. FAS Tokyo expects rice supplies available for feed to increase to as much as 1.4 million tons (actual tonnage) in MY2021/22 based on increases in feed rice production and increasing availability of MA rice as rice product manufacturers shift from MA rice to competitively priced domestic rice for processing and undersized grain rice.[7] FAS Tokyo anticipates the availability of rice for feed to further increase to as much as 1.5 million tons (actual tonnage) in MY2022/23 as these trends continue.

[6] MAFF sells five-year old government contingency reserve rice for manufacturing processed products and feed.
[7] MAFF sells MA rice for manufacturing processed products and feed.

## Trade

*Imports*
FAS Tokyo expects Japan to import 682,000 tons of rice in MY2021/22 and MY2022/23 in line with its WTO commitment. Imports of Australian rice, for which Japan sets a country specific quota through the Comprehensive and Progression Transpacific Partnership (CPTPP), are limited. As of March 14, MAFF has awarded successful bids for 320 of the 6,240-ton quota for JFY2021. In JFY2021, with low prices for Japanese rice and high global rice prices, MAFF awarded only 21,386 tons (actual tonnage) of rice through the WTO simultaneous buy and sell (SBS) tender system (Chart 14). MAFF transferred the remaining 78,614 tons of the 100,000-ton SBS quota to imports under the Ordinary Market Access (OMA) tenders to fulfill the 682,000-ton WTO TRQ.

**Chart 14. Japan SBS Rice Imports Tender Results**

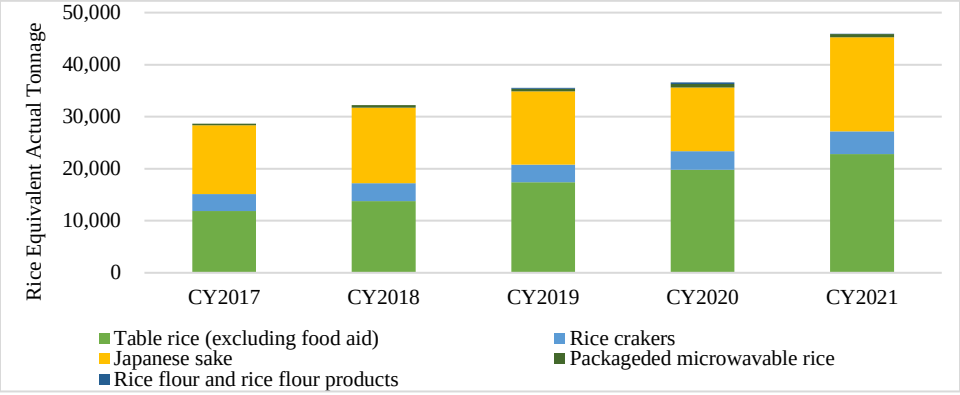



Source: MAFF

*Exports*
FAS Tokyo raised MY2020/21 exports to 110,000 tons based on revised estimates of approximately 90,000 tons of food aid exports and 20,000 tons of commercial exports. FAS Tokyo estimates food aid exports at 90,000 tons based on the average food aid exports between MY2015/16 and MY2019/20. FAS Tokyo forecasts MY2022/23 exports to rise to 120,000 tons as commercial exports continue to grow.

Japan's commercial rice exports grew 15 percent, to 22,833 tons (actual tonnage), in CY2021. Exports to the top three destinations, Hong Kong, Singapore, and the United States increased 28 percent, 35 percent, and 13 percent respectively. In line with the global economic recovery, *sake* (rice wine) exports surged by 47 percent, to 32,053 kiloliters (18,054 tons rice equivalent), in CY2021. Top destinations for *sake* were the United States, China, and Hong Kong.

**Chart 15. Japan Export of Rice, Rice Products, and *Sake***




Source: MAFF

**Stocks**

FAS Tokyo expects MY2021/22 ending stocks to be 1.952 million tons. FAS Tokyo forecasts MY2022/23 stocks to drop to 1.817 million tons, reflecting an increase in consumption. The ending stocks include government contingency reserves of 910,000 tons (actual tonnage) and MA rice stocks.

## Appendix 1. Compound Feed Production (MT)

| MY | Corn | Sorghum | Wheat | Wheat Flour | Barley | Rice | Other Grains | DDGS | Soybean Meal | Rapeseed Meal | Other Ingredients | TOTAL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2006/07 | 11,968,822 | 1,207,666 | 95,022 | 128,407 | 841,067 | 501,410 | 339,008 | 0 | 3,403,270 | 905,696 | 5,059,301 | 24,449,669 |
| | 49.0% | 4.9% | 0.4% | 0.5% | 3.4% | 2.1% | 1.4% | 0.0% | 13.9% | 3.7% | 20.7% | 100% |
| 2007/08 | 12,151,595 | 1,061,836 | 99,070 | 140,704 | 864,290 | 604,450 | 247,691 | 0 | 3,363,196 | 954,442 | 5,187,245 | 24,674,519 |
| | 49.2% | 4.3% | 0.4% | 0.6% | 3.5% | 2.4% | 1.0% | 0.0% | 13.6% | 3.9% | 21.0% | 100% |
| 2008/09 | 12,032,218 | 1,599,366 | 131,179 | 142,216 | 886,989 | 240,408 | 196,327 | 0 | 3,292,571 | 1,024,726 | 5,157,186 | 24,703,186 |
| | 48.7% | 6.5% | 0.5% | 0.6% | 3.6% | 1.0% | 0.8% | 0.0% | 13.3% | 4.1% | 20.9% | 100% |
| 2009/10 | 11,663,020 | 1,605,491 | 203,985 | 133,065 | 904,803 | 396,061 | 230,738 | 96,210 | 3,428,260 | 1,032,870 | 4,977,265 | 24,671,768 |
| | 47.3% | 6.5% | 0.8% | 0.5% | 3.7% | 1.6% | 0.9% | 0.4% | 13.9% | 4.2% | 20.2% | 100% |
| 2010/11 | 11,287,696 | 1,380,159 | 245,857 | 145,289 | 889,928 | 537,274 | 245,270 | 284,154 | 3,326,471 | 1,020,434 | 4,892,547 | 24,255,079 |
| | 46.5% | 5.7% | 1.0% | 0.6% | 3.7% | 2.2% | 1.0% | 1.2% | 13.7% | 4.2% | 20.2% | 100% |
| 2011/12 | 10,688,501 | 1,461,639 | 732,039 | 152,292 | 882,497 | 589,640 | 191,402 | 400,836 | 3,178,883 | 1,095,688 | 4,897,908 | 24,271,325 |
| | 44.0% | 6.0% | 3.0% | 0.6% | 3.6% | 2.4% | 0.8% | 1.7% | 13.1% | 4.5% | 20.2% | 100% |
| 2012/13 | 10,154,181 | 1,856,711 | 942,885 | 176,433 | 910,896 | 397,406 | 169,561 | 443,993 | 2,862,672 | 1,183,477 | 4,943,907 | 24,042,122 |
| | 42.2% | 7.7% | 3.9% | 0.7% | 3.8% | 1.7% | 0.7% | 1.8% | 11.9% | 4.9% | 20.6% | 100% |
| 2013/14 | 10,794,681 | 1,006,553 | 649,448 | 160,815 | 870,127 | 732,983 | 151,688 | 512,652 | 2,827,948 | 1,143,199 | 4,860,209 | 23,710,303 |
| | 45.5% | 4.2% | 2.7% | 0.7% | 3.7% | 3.1% | 0.6% | 2.2% | 11.9% | 4.8% | 20.5% | 100% |
| 2014/15 | 10,530,414 | 901,173 | 366,510 | 161,019 | 805,315 | 1,172,993 | 148,034 | 476,786 | 2,848,515 | 1,196,650 | 4,773,182 | 23,380,591 |
| | 45.0% | 3.9% | 1.6% | 0.7% | 3.4% | 5.0% | 0.6% | 2.0% | 12.2% | 5.1% | 20.4% | 100.0% |
| 2015/16 | 10,868,266 | 650,398 | 398,723 | 177,880 | 798,662 | 1,206,845 | 136,642 | 405,308 | 3,018,163 | 1,115,233 | 4,784,547 | 23,560,667 |
| | 46.1% | 2.8% | 1.7% | 0.8% | 3.4% | 5.1% | 0.6% | 1.7% | 12.8% | 4.7% | 20.3% | 100% |
| 2016/17 | 10,963,813 | 537,868 | 451,748 | 198,078 | 822,410 | 1,113,796 | 137,883 | 501,962 | 2,929,498 | 1,188,101 | 4,839,950 | 23,685,108 |
| | 46.3% | 2.3% | 1.9% | 0.8% | 3.5% | 4.7% | 0.6% | 2.1% | 12.4% | 5.0% | 20.4% | 100% |
| 2017/18 | 11,423,194 | 520,789 | 413,442 | 203,771 | 828,412 | 838,915 | 138,958 | 543,956 | 2,929,230 | 1,118,223 | 4,900,850 | 23,859,742 |
| | 47.9% | 2.2% | 1.7% | 0.9% | 3.5% | 3.5% | 0.6% | 2.3% | 12.3% | 4.7% | 20.5% | 100% |
| 2018/19 | 11,650,310 | 464,960 | 390,898 | 186,242 | 822,948 | 746,394 | 137,063 | 516,466 | 2,989,815 | 1,111,783 | 4,932,988 | 23,949,867 |
| | 48.6% | 1.9% | 1.6% | 0.8% | 3.4% | 3.1% | 0.6% | 2.2% | 12.5% | 4.6% | 20.6% | 100.0% |
| 2019/20 | 11,796,346 | 383,653 | 361,064 | 175,347 | 836,561 | 907,750 | 139,825 | 429,848 | 3,065,662 | 1,125,880 | 4,919,902 | 24,141,838 |
| | 48.9% | 1.6% | 1.5% | 0.7% | 3.5% | 3.8% | 0.6% | 1.8% | 12.7% | 4.7% | 20.4% | 100.0% |
| 2020/21 | 11,609,634 | 305,656 | 406,815 | 169,629 | 878,353 | 1,133,973 | 137,585 | 435,612 | 3,066,096 | 1,141,458 | 4,910,010 | 24,194,821 |
| | 48.0% | 1.3% | 1.7% | 0.7% | 3.6% | 4.7% | 0.6% | 1.8% | 12.7% | 4.7% | 20.3% | 100.0% |
| 2021 Oct | 947,966 | 22,665 | 42,939 | 14,196 | 75,847 | 104,252 | 11,529 | 36,269 | 257,772 | 96,701 | 409,086 | 2,019,222 |
| | 46.9% | 1.1% | 2.1% | 0.7% | 3.8% | 5.2% | 0.6% | 1.8% | 12.8% | 4.8% | 20.3% | 100.0% |
| Nov | 989,172 | 23,911 | 42,407 | 14,545 | 77,704 | 116,625 | 11,841 | 38,279 | 270,197 | 101,091 | 425,705 | 2,111,477 |
| | 46.8% | 1.1% | 2.0% | 0.7% | 3.7% | 5.5% | 0.6% | 1.8% | 12.8% | 4.8% | 20.2% | 100.0% |
| Dec | 1,068,384 | 24,664 | 43,956 | 16,293 | 86,065 | 125,763 | 12,556 | 41,735 | 290,055 | 107,164 | 462,813 | 2,279,448 |
| | 46.9% | 1.1% | 1.9% | 0.7% | 3.8% | 5.5% | 0.6% | 1.8% | 12.7% | 4.7% | 20.3% | 100.0% |

Source: MAFF
MY: October – September

**Appendix Table 2. Japan SBS Rice Import Tender Results (As of March 14, 2022)**

| | | JFY2012 | JFY2013 | JFY2014 | JFY2015 | JFY2016 | JFY2017 | JFY2018 | JFY2019 | JFY2020 | JFY2021 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| USA | SBS | 40,974 | 20,046 | 3,804 | 19,909 | 56,438 | 58,783 | 33,936 | 55,343 | 42,101 | 8,420 |
| | OMA | 281,000 | 300,000 | 316,000 | 300,000 | 278,000 | 266,000 | 286,000 | 265,000 | 278,500 | 298,800 |
| | Total | 321,974 | 320,046 | 319,804 | 319,909 | 334,438 | 324,783 | 319,936 | 320,343 | 320,601 | 307,220 |
| | Share | 47.4% | 47.1% | 47.2% | 47.2% | 49.3% | 47.8% | 47.2% | 47.2% | 47.3% | 46.2% |
| Thailand | SBS | 4,870 | 11,173 | 5,596 | 6,276 | 6,283 | 5,968 | 7,614 | 7,521 | 6,874 | 6,054 |
| | OMA | 245,564 | 300,933 | 290,174 | 299,458 | 327,275 | 228,846 | 273,616 | 276,692 | 240,341 | 260,848 |
| | Total | 250,434 | 312,106 | 295,770 | 305,734 | 333,558 | 234,814 | 281,230 | 284,213 | 247,215 | 266,902 |
| | Share | 36.9% | 45.9% | 43.6% | 45.1% | 49.2% | 34.6% | 41.5% | 41.9% | 36.5% | 40.1% |
| Australia | SBS | 23,873 | 26,244 | 559 | 1,285 | 6,861 | 30,702 | 13,203 | 260 | - | - |
| | OMA | 35,000 | 12,000 | 12,000 | - | - | 36,000 | - | - | - | 24,000 |
| | Total | 58,873 | 38,244 | 12,559 | 1,285 | 6,861 | 66,702 | 13,203 | 260 | - | 24,000 |
| | Share | 8.7% | 5.6% | 1.9% | 0.2% | 1.0% | 9.8% | 1.9% | 0.0% | - | 3.6% |
| | CSQ | | | | | | | 1,120 | 3,459 | 595 | 320 |
| China | SBS | 28,164 | 714 | 780 | 736 | 2,396 | 2,240 | 1,214 | 2,060 | 2,120 | 1,110 |
| | OMA | 13,000 | | 48,000 | 49,000 | - | 48,000 | 60,000 | 60,000 | 99,000 | 60,000 |
| | Total | 41,164 | 714 | 48,780 | 49,736 | 2,396 | 50,240 | 61,214 | 62,060 | 101,120 | 61,110 |
| | Share | 6.1% | 0.1% | 7.2% | 7.3% | 0.4% | 7.4% | 9.0% | 9.2% | 14.9% | 9.2% |
| All others | SBS | 2,119 | 2,662 | 867 | 1,109 | 1,336 | 2,307 | 2,577 | 11,359 | 9,178 | 5,802 |
| | OMA | 5,000 | 6,000 | - | - | - | - | - | - | - | - |
| | Total | 7,119 | 8,662 | 867 | 1,109 | 1,336 | 2,307 | 2,577 | 11,359 | 9,178 | 9,179 |
| | Share | 1.0% | 1.3% | 0.1% | 0.2% | 0.2% | 0.3% | 0.4% | 1.7% | 1.4% | 1.4% |
| Total | SBS | 100,000 | 60,839 | 11,606 | 29,315 | 73,314 | 100,000 | 58,544 | 76,543 | 60,273 | 21,386 |
| | OMA | 579,564 | 618,933 | 666,174 | 648,458 | 605,275 | 578,846 | 619,616 | 601,692 | 617,841 | 643,648 |
| | Total | 679,564 | 679,772 | 677,780 | 677,773 | 678,589 | 678,846 | 678,160 | 678,235 | 678,114 | 665,034 |
| | CSQ | | | | | | | 1,120 | 3,459 | 595 | 320 |

Source: MAFF

**Appendix Table 3. Japan Grain Imports and Top Three Suppliers**

| | MT | | | Share % | USD | | | Share % |
|---|---|---|---|---|---|---|---|---|
| | MY2018/19 | MY2019/20 | MY2020/21 | MY2020/21 | MY2018/19 | MY2019/20 | MY2020/21 | MY2020/21 |
| **Corn** | | | | | | | | |
| Total | 16,050,191 | 15,887,903 | 15,479,904 | | 3,527,063,208 | 3,377,963,598 | 4,315,039,456 | |
| United States | 13,848,736 | 9,788,421 | 10,971,520 | 70.9 | 3,035,929,267 | 2,085,304,300 | 3,223,478,714 | 74.7 |
| Brazil | 1,744,395 | 5,889,741 | 3,716,629 | 24.0 | 378,449,015 | 1,233,248,788 | 814,729,082 | 18.9 |
| Argentina | 256,986 | 29,026 | 496,584 | 3.2 | 54,206,388 | 5,892,463 | 171,511,929 | 4.0 |
| **Sorghum** | | | | | | | | |
| Total | 448,592 | 426,457 | 299,443 | | 100,315,045 | 93,378,687 | 88,240,733 | |
| Argentina | 136,219 | 210,173 | 141,670 | 47.3 | 28,393,749 | 43,869,013 | 38,683,240 | 43.8 |
| Australia | 305 | 745 | 79,070 | 26.4 | 179,459 | 319,386 | 26,768,002 | 30.3 |
| United States | 310,254 | 214,276 | 37,127 | 12.4 | 71,116,216 | 48,697,797 | 10,405,269 | 11.8 |
| **Barley** | | | | | | | | |
| Total | 1,157,869 | 1,253,340 | 1,131,879 | | 329,186,374 | 321,020,343 | 299,152,517 | |
| Australia | 696,726 | 436,036 | 1,004,828 | 88.8 | 194,603,850 | 116,288,276 | 260,689,423 | 87.1 |
| Canada | 328,777 | 626,848 | 113,496 | 10.0 | 92,095,938 | 151,228,032 | 30,862,451 | 10.3 |
| United States | 35,910 | 29,813 | 13,537 | 1.2 | 19,465,355 | 16,594,729 | 7,577,560 | 2.5 |
| **Wheat** | | | | | | | | |
| Total | 5,385,173 | 5,328,281 | 5,052,526 | | 1,604,454,830 | 1,506,509,264 | 1,513,397,680 | |
| United States | 2,543,185 | 2,512,681 | 2,434,938 | 48.2 | 731,099,822 | 680,046,875 | 716,191,746 | 47.3 |
| Canada | 1,802,139 | 1,855,825 | 1,761,927 | 34.9 | 539,937,891 | 532,601,761 | 533,081,379 | 35.2 |
| Australia | 1,031,960 | 950,904 | 850,016 | 16.8 | 328,998,475 | 288,883,932 | 260,608,295 | 17.2 |
| **Rice** | | | | | | | | |
| Total | 631,890 | 707,996 | 647,264 | | 455,386,972 | 526,833,164 | 494,913,757 | |
| United States | 304,853 | 342,234 | 296,739 | 45.9 | 269,310,171 | 311,045,981 | 276,635,048 | 55.9 |
| Thailand | 246,851 | 278,369 | 277,705 | 42.9 | 113,360,828 | 137,068,629 | 149,343,583 | 30.2 |
| China | 61,296 | 74,128 | 62,047 | 9.6 | 54,932,343 | 65,588,950 | 57,001,521 | 11.5 |

Source: Trade Data Monitor

**Attachments:**

No Attachments