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Grain and Feed Update

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Report Highlights:

Rice consumption continues to decline due to a shrinking population and reductions in per capita consumption. Price competitiveness is expected to continue driving increased demand for imported corn at the expense of sorghum, rice, wheat, and DDGS in livestock feed mixes and compounds. US wheat is maintaining its share in the market despite Japan's preferential trade agreements with competitors. Tight global supplies and high cost, insurance, and freight prices put downward pressure on feed barley imports, but demand remains strong for US varieties high in beta glucan for food consumption.

Commodities:

Barley
Corn
Rice, Milled
Wheat
Sorghum

Rice

Rice Production, Supply and Distribution

Rice, Milled Market Begin Year Japan	2017/2018		2018/2019		2019/2020	
	Nov 2017		Nov 2018		Nov 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	1557	1557	1550	1550	1550	1545
Beginning Stocks	2410	2410	2228	2223	1949	2005
Milled Production	7787	7787	7650	7657	7700	7800
Rough Production	10696	10696	10508	10518	10577	10714
Milling Rate (.9999)	7280	7280	7280	7280	7280	7280
MY Imports	686	686	685	690	685	690
TY Imports	670	670	685	690	685	690
TY Imp. from U.S.	274	324	0	0	0	0
Total Supply	10883	10883	10563	10570	10334	10495
MY Exports	55	60	58	65	60	70
TY Exports	55	60	58	65	60	70
Consumption and Residual	8600	8600	8556	8500	8480	8400
Ending Stocks	2228	2223	1949	2005	1794	2025
Total Distribution	10883	10883	10563	10570	10334	10495
Yield (Rough)	6.8696	6.8696	6.7794	6.7858	6.8239	6.9346

(1000 HA) ,(1000 MT) ,(MT/HA)

Note: The quantity of rice in this section is expressed on a milled rice basis, unless otherwise specified.

Production

The MY2019/20¹ total planted area for rice is estimated to decrease slightly to 1.545 million ha, but total production is expected to increase to 7.8 million metric tons (MT) based on a projected yield improvement from last year's crop. MY2019/20 production is expected to be similar to a normal year based on the Ministry of Agriculture, Forestry and Fisheries (MAFF)'s August 15 crop progress report. A lack of sunshine and low temperatures in July delayed rice ear emergence, but improved weather conditions in August accelerated growth and improved the yield outlook. MAFF expects a slightly better or a normal yield for the major rice producing regions of Hokkaido, Tohoku, and Hokuriku as high temperatures and abundant sunshine in May contributed to the increase in the number of rice ears. Extremely high temperatures in Kanto in August and September may negatively affect quality and result in high ratios of immature smaller kernels, similar to MY2018/19.

According to MAFF's June planting intension survey, reductions in the area planted for rice for feed and for processing is expected to offset an increase in the area planted for government

¹ The marketing year (MY) for rice runs from November to October.

reserves. In an effort to prevent oversupply of table rice in the domestic market, MAFF set a purchase price of the government reserve rice equivalent to the market price. However, most of the expanded reserve rice area came at the expense of feed rice and rice for processing, not table rice. The planted area for table rice is expected to only decrease slightly, by 0.4 percent. Despite a decrease in area planted, table rice production in MY2019/20 is expected to increase as yield is projected to improve from the previous year.

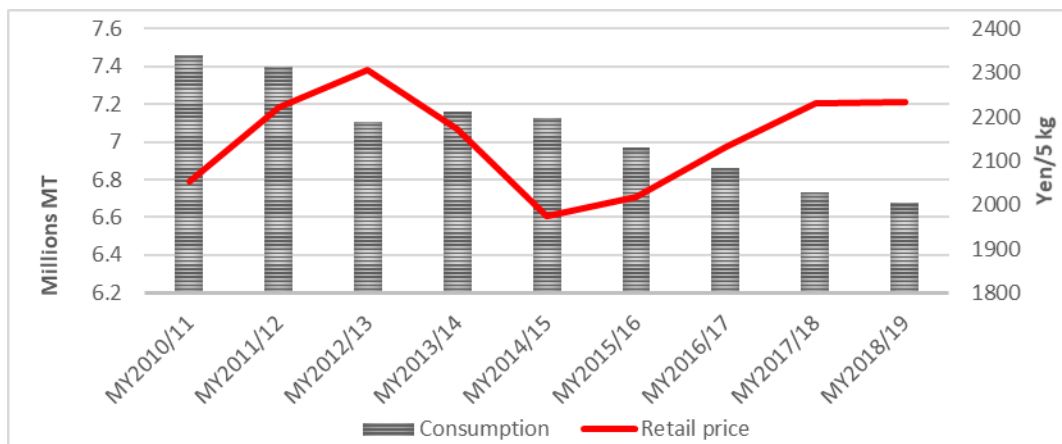
Consumption

MY2018/19 consumption is expected to decrease to 8.5 million MT due to an anticipated reduction in table rice consumption and feed use. A combination of population decline and a downward trend in per capita consumption is reducing overall table rice consumption. MAFF estimates that the pace of consumption decrease for table rice has accelerated in recent years, which is partly attributable to a year-on-year increase in the market prices of table rice since 2016 (see Chart 1).

Feed consumption is also expected to decrease in MY2018/19 due to decreased domestic feed rice production and decreased government sales of Minimum Access (MA) rice and reserves for feed. Processing continues to drive demand for MA rice and reserves. Due to continued declines in domestic feed rice production and sales of MA rice for feed, FAS/Tokyo forecasts MY2019/20 feed consumption to decrease further.

Seeking convenience, Japanese consumers are eating more ready to eat rice in lieu of preparing rice at home. Production of sterilized packaged cooked rice has been steadily increasing and increased 5.7 percent to 170,000 MT (product volumes) from 2017 to 2018. Overall, production of processed rice products increased 4.6 percent to 390,000 MT in 2018, up 20 percent from 2013. However, the trend of increased consumption of packaged rice is not expected to overturn overall table rice consumption declines. Demand for rice for processing has been stable as increases in exports of sake and rice crackers offset decline in domestic consumption of these products. Accordingly, FAS/Tokyo forecasts MY2019/20 rice consumption to decrease to 8.4 million MT as demand for table rice and feed is anticipated to weaken.

Chart 1. Table Rice Consumption and Retail Price



Source: MAFF

Trade

Demand for imported rice was weak during the 2018 Japanese Fiscal Year (JFY)² as a higher ratio of undersized kernels in MY2018/19 production suppressed demand for rice imported under the Simultaneous Buy and Sell (SBS) tender system. As a result, only 58,444 MT of Japan's 100,000 MT (58 percent) of SBS rice quota was utilized in JFY2018.

As table rice prices remain high, there is demand for reasonably priced imported rice, especially from the foodservice and home meal replacement industries. However, if overall table rice production increases and the ratio of undersized kernels is high in MY2019/20, the 100,000 MT SBS quota is not expected to be fully utilized in JFY2019. Japan is still expected to import 682,000 MT of rice to meet its WTO commitments (see Table 1). In addition to the WTO-established MA quota, a 6,000 MT country-specific quota (CSQ) was established to import rice and rice products from Australia under the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). By September 15, 2019, two SBS tenders for Australia's CSQ were held and 1,719 MT (actual tonnage) was successfully bid.

Through MAFF's promotion efforts, Japanese commercial rice exports continue to grow year-over-year. According to MAFF, commercial exports increased 23 percent to 7,777 MT (actual tonnage) in the first six months of CY2019 compared to the same period last year. Japan utilizes MA rice to donate as food aid which accounts for the majority of total Japanese rice exports. For the last five years, the annual quantity of MA rice exported as food aid varied from 30,000 MT to 60,000 MT depending on availability and demand from recipient countries. With the projected increase in the commercial rice exports, total exports are forecast to increase to 65,000 MT in MY2018/19 and to 70,000 MT in MY2019/20 assuming current levels of food aid exports remain unchanged.

Stocks

GOJ reserves, MA rice stocks, and private sector stocks are expected to total approximately 2 million MT in MY2018/19 and 2.025 MMT in MY2019/20.

² Japanese Fiscal Year (JFY) runs from April to March.

Wheat

Wheat Production, Supply and Distribution

Wheat Market Begin Year Japan	2017/2018		2018/2019		2019/2020	
	Jul 2017		Jul 2018		Jul 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	213	212	212	212	212	212
Beginning Stocks	1210	1210	1181	1229	971	1029
Production	972	970	880	860	950	960
MY Imports	5876	5876	5726	5726	5900	5850
TY Imports	5876	5876	5726	5726	5900	5850
TY Imp. from U.S.	3059	2937	2732	2723	0	0
Total Supply	8058	8056	7787	7815	7821	7839
MY Exports	277	277	286	286	280	285
TY Exports	277	277	286	286	280	285
Feed and Residual	750	750	680	700	700	650
FSI Consumption	5850	5800	5850	5800	5800	5800
Total Consumption	6600	6550	6530	6500	6500	6450
Ending Stocks	1181	1229	971	1029	1041	1104
Total Distribution	8058	8056	7787	7815	7821	7839
Yield	4.5634	4.5755	4.1509	4.0566	4.4811	4.5283
(1000 HA) ,(1000 MT) ,(MT/HA)						

Production

Improved from last year's poor crop, MY2019/20³ wheat production is estimated to increase to 960,000 MT. Although MAFF statistics are not yet released, better or normal yields have been reported in all regions except the Kanto region. A normal or better yield is expected in Hokkaido, where 60 percent of Japanese wheat is produced. A bumper crop was reported in Kyushu, Tokai, and Chubu due to consistently favorable weather conditions and limited rain during harvest. Demand for domestic wheat remains strong, however, expansion of production is constrained as wheat is produced as a rotational crop, or a conversion crop for rice paddies.

Consumption

Reflecting solid demand, annual wheat flour production has been stable at approximately 4.7 million MT. A warmer than normal summer led to a small, 0.6 percent, decrease of wheat flour used for bread production in MY2018/19, however this was nullified by an increase in noodle production. FAS/Tokyo anticipates food, seed and industrial (FSI) consumption of wheat to stay flat at 5.8 million MT for MY2018/19 and MY2019/20.

Emerging factors may put downward pressure on food wheat consumption over the long term. Manufacturers in the Japanese market are introducing new products to reflect a growing interest in low carbohydrate foods. Although still niche, low carbohydrate pasta, instant noodles, frozen udon, cake mix, and cookies have been introduced. Although still small, demand for rice flour has been gradually increasing since the establishment of the Rice Flour Standards by Use and Use Indications by MAFF in March 2017 (see [JA7094](#)).

³ Wheat Marketing Year (MY) runs from July to June.

MY2018/19 feed consumption is estimated to have dropped to 700,000 MT (6.7 percent) as feed mills replaced wheat with competitively priced corn. FAS/Tokyo forecasts feed wheat consumption to decrease to 650,000 MT in MY2019/20 as corn prices remain competitive and the potential for increased spread of hog cholera puts downward pressure on demand.

Trade

MY2018/19 total wheat and wheat products⁴ imports decreased to 5.7 million MT (2.6 percent). However, FAS/Tokyo forecasts MY2019/20 wheat and wheat products imports to recover to 5.85 million MT with a projected increase in food wheat and wheat products imports.

Under the CPTPP and Japan-EU Economic Partnership Agreement (EPA), which entered into force on December 31, 2018 and February 1, 2019 respectively, Japan lowered a mark-up on state traded wheat and wheat products imported from CPTPP and the EU member states (see [JA7153](#)). Japan also established CSQs for Canada and Australia, and an EU quota to import wheat and wheat products. As Japan's tariff schedule runs with its fiscal year, the mark-up was reduced further on April 1, 2019. However, due to its price competitiveness, U.S. wheat maintained a 47 percent share in the Japanese food wheat import market between January and July 2019 (see Table 2 and 3). The mark-up reduction for Canadian and Australian wheat has thus far had no significant impact on U.S. wheat.

In addition to wheat, Japan established quotas to import wheat flour, processed wheat, wheat preparations, and food preparations containing wheat under the CPTPP and the Japan-EU EPA. Tariffs were also eliminated within the quotas, but mark-ups were maintained. There have been no imports for these wheat products within the newly established quotas by September 17, 2019.

From October 2019 to March 2020, MAFF will reduce the average sales price of the five major wheat classes by 8.7 percent due to a reduction in international market prices and freight costs, the appreciation of the Japanese Yen, and the reduction to the mark-up applied to Canadian and Australian wheat.⁵ MAFF estimates that the 8.7 percent reduction in sales price will lower retail prices of wheat products by only 0.007 percent. MAFF explains that as the ingredient prices of wheat account for a small portion of the retail prices of wheat products such as bread and noodles, changes in MAFF's sales prices have little effect on consumers' lives.

Pasta accounts for the majority of wheat products imported into Japan. Under the Japan-EU EPA, a 30 yen/kg duty on pasta decreased to 26.67 yen/kg in the 1st year, to 24.55 yen/kg in the 2nd year, and will be phased out in Year 11 of the Japan-EU EPA. Under CPTPP, the duty reduced to 28 yen/kg in the 1st year, to 26 yen/kg in the 2nd year, and then to 12 yen/kg in Year 9 of CPTPP onwards. Between January and July 2019, pasta imports increased 0.2 percent from the same period in 2018 (see Table 4). Imports from the two dominant suppliers, Italy and Turkey increased 6.1 percent and 1.8 percent respectively as their CIF unit prices decreased 9.1 percent and 2.7 percent due to appreciation of the Japanese yen (see Table 5). Decreased CIF

⁴ Wheat products in this report are defined to include wheat flour (HS1101), uncooked pasta (HS190219), other pasta (HS190230), and couscous (HS190240).

⁵ U.S. Western White, U.S. Hard Red Winter, U.S. Dark Northern Spring, Canadian Western Red Spring #1, and Australian Standard White

prices for Italy and Turkey and the tariff reduction for Italy further improved their price competitiveness against the United States, which resulted in imports from the United States dropping by 21.4 percent despite a 2.1 percent decrease in the CIF price of U.S. pasta.

Japanese exports of wheat products increased 3.5 percent to 286,000 MT in MY2018/19. Japan allows duty-free wheat imports when it is processed in Japan into wheat products such as wheat flour for exports. MY2019/20 exports are forecast to stay flat at 285,000 MT.

Stocks

Japanese wheat flour mills hold 2.3 months of food wheat stocks, of which the GOJ extends financial support for storage costs for 1.8 months as a contingency. MY2018/19 ending stocks are estimated to have decreased to 1 million MT to supplement reduction in production and imports, however, MY2019/20 ending stocks are forecast to increase to 1.1 million MT due to the anticipated increase in imports.

Barley

Barley Production, Supply and Distribution

Barley Market Begin Year Japan	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	61	61	61	61	61	61
Beginning Stocks	309	309	261	348	194	343
Production	186	186	173	175	180	195
MY Imports	1253	1253	1100	1200	1100	1200
TY Imports	1253	1253	1100	1200	1100	1200
TY Imp. from U.S.	34	28	0	0	0	0
Total Supply	1748	1748	1534	1723	1474	1738
MY Exports	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0
Feed and Residual	1107	1000	960	980	960	1000
FSI Consumption	380	400	380	400	380	400
Total Consumption	1487	1400	1340	1380	1340	1400
Ending Stocks	261	348	194	343	134	338
Total Distribution	1748	1748	1534	1723	1474	1738
Yield	3.0492	3.0492	2.8361	2.8689	2.9508	3.1967
(1000 HA) ,(1000 MT) ,(MT/HA)						

Production

Driven by improved yields FAS/Tokyo estimates MY2019/20 barley production to increase 11 percent, to 195,000 MT.⁶ While MAFF has yet to publish planted area and production estimates, a bumper crop was reported in Western Japan as favorable weather continued throughout the growing season and harvest was not hampered by rain. The planted area is estimated to remain unchanged at 61,000 ha despite strong demand for domestic barley for food and tea consumption, as profitability for barley is lower than for rice and soybeans. Although the total area is estimated to remain unchanged, farmers increased the production of glutinous type

⁶ Barley Marketing Year (MY) runs from October to September.

of barley at the expense of non-glutinous barley to meet strong demand for beta glucan rich glutinous barley.

Consumption

MY2019/20 FSI consumption is forecast at 400,000 MT, to reflect demand for glutinous barley and barley tea. MY2019/20 feed consumption is forecast to increase to 1 million MT as beef cattle inventories are anticipated to recover.

FAS/Tokyo increased MY2017/18 food, seed, and industrial (FSI) consumption to 400,000 MT based on high demand for glutinous barley products and barley tea. The increased demand for glutinous barley products and barley tea are estimated to outweigh the decline of barley used in *shochu* (Japanese spirits), *miso* (bean paste) and soy source production. FAS/Tokyo estimates FSI consumption remain unchanged at 400,000 MT for MY2018/19 and forecasts the same for MY2019/20 to reflect ongoing demand for glutinous barley and barley for tea.

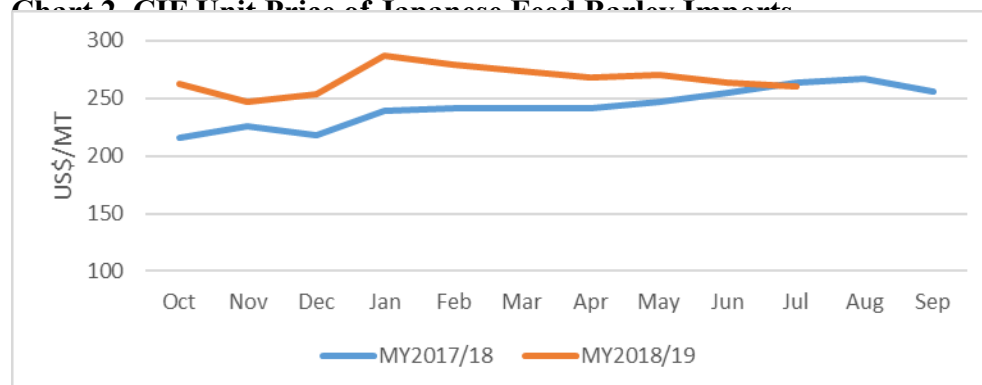
Beef cattle consume approximately 85 percent of barley used in compound and mixed feed production. Based on barley used in compound and mix feed and on-farm production, FAS/Tokyo lowered MY2017/18 feed consumption to 1 million MT. In accordance with a slight decline in beef cattle inventories, MY2018/19 barley for feed demand is estimated to drop slightly to 980,000 MT. However, beef cattle inventories are forecast to recover (see [JA9105](#)) and FAS/Tokyo forecasts MY2019/20 barley for feed consumption to grow to 1 million MT.

Trade

MY2018/19 total barley imports are expected to decrease 4 percent, to 1.2 million MT, based on a slower pace of imports over the first 10 months of MY2018/19. Increased CIF prices, reflecting tight global supplies, and a slight decrease in feed demand are driving Japan's decline of barley imports (see Chart 2). However, MY2019/20 imports are forecast to recover to 1.2 MMT with the projected recovery in feed demand.

Similar to wheat, barley is a state traded item. Under CPTPP and the Japan-EU EPA import quotas were established for state-traded food barley and the mark-up for in-quota barley is gradually reduced (see [JA8042](#)). In addition, separate quotas for barley flour, groats and pellets, and barley food preparations were established and in-quota tariffs were eliminated immediately, but the mark-up is maintained. The mark-up reduction for state-traded food barley has not to date resulted in increased imports from CPTPP and EU countries or increased their share of the market. In fact, between January and July 2019, food barley imports from the United States surged 40 percent compared to the same time period in 2018, while imports from Australia and Canada declined (see Table 6). The CIF unit price of U.S. food barley is approximately 60 percent higher than Canadian and Australian food barley, as the majority of food barley imports from the United States is waxy hull-less barley, which is highly popular beta glucan rich glutinous barley (see Table 7). There have been no imports of barley flour, groats and pellets, and barley food preparations in the newly established CPTPP and Japan-EU EPA quotas by September 17, 2019.

Chart 2. CIE Unit Price of Japanese Feed Barley Imports



Source: Global Trade Atlas

Stocks

MY2018/19 and MY019/20 ending stocks are expected to remain unchanged at approximately 340,000 MT.

Corn

Corn Production, Supply and Distribution

Corn Market Begin Year Japan	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	1	1	1	1	1	1
Beginning Stocks	1323	1323	1393	1291	1395	1293
Production	2	2	2	2	2	2
MY Imports	15668	15666	15800	16000	15600	16050
TY Imports	15668	15666	15800	16000	15600	16050
TY Imp. from U.S.	12072	12063	0	0	0	0
Total Supply	16993	16991	17195	17293	16997	17345
MY Exports	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0
Feed and Residual	12000	12000	12100	12300	11900	12300
FSI Consumption	3600	3700	3700	3700	3700	3750
Total Consumption	15600	15700	15800	16000	15600	16050
Ending Stocks	1393	1291	1395	1293	1397	1295
Total Distribution	16993	16991	17195	17293	16997	17345
Yield	2	2	2	2	2	2

(1000 HA) ,(1000 MT) ,(MT/HA)

Production

While feed corn production is limited, Japan produced 4.5 million MT of whole crop silage corn on 94,600 ha in 2018. In July 2019, the first outbreak of fall armyworm (FAW) was confirmed in southwestern Japan and initial reports from MAFF indicate silage corn is expected to bear the brunt of the outbreak (see [JA9111](#)). However, damage to the overall silage corn crop is expected to be limited. FAW has not been confirmed in Hokkaido, which accounts for 60 percent of production, and MAFF has provided a number of resources to producers to combat FAW related

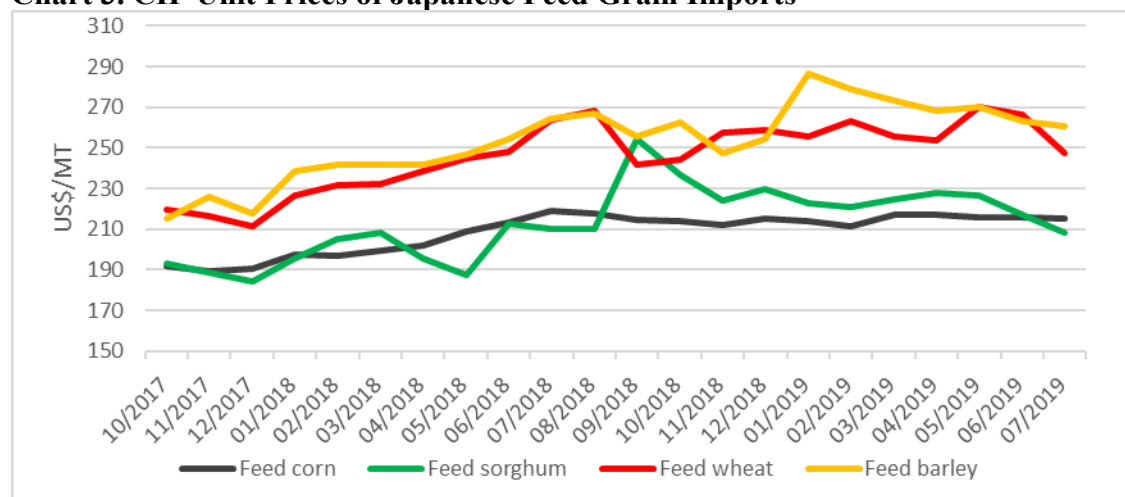
crop damage. MAFF expects most cattle farmers to substitute corn silage with other forages, such as hay or hay silage and compound feed to balance out the diet for their herds.

Consumption

Due to price competitiveness, corn for feed demand remained strong and consumption is expected to rise 3.4 percent, to 12.3 million MT in MY2018/19, at the expense of sorghum, rice, wheat, and distiller’s dried grains with solubles (DDGS) (see Chart 3 and Table 8).⁷ Feed demand is forecast to remain unchanged at 12.3 million MT in MY2019/20.

FAS/Tokyo maintains MY2018/19 food, seed and industrial (FSI) consumption at 3.7 million MT as cornstarch, which accounts for the majority of FSI consumption and is used to make High Fructose Corn Syrup (HFCS), production remains stable. MAFF expects cornstarch production to increase 24,000 MT, to 2.338 million MT, next year to meet a projected increase in demand for soft-drinks during the 2020 Tokyo Olympic and Paralympic Games. Accordingly, MY2019/20 FSI consumption is forecast to increase slightly to 3.75 million MT.

Chart 3. CIF Unit Prices of Japanese Feed Grain Imports



Source: Global Trade Atlas

Trade

Reflecting bullish feed demand, MY2018/19 is expected increase 2 percent, to 16 million MT, based on a 2.1 percent increase in imports for the first 10 months of MY2018/19. MY2019/20 imports are forecast to increase slightly to 16.05 MMT to meet a projected increase for cornstarch demand.

Stocks

As Japan relies heavily on feed grain imports, the GOJ provides support payments to feed mills which hold 850,000 MT of feed grains for contingency, of which corn is the majority.

⁷ Corn Marketing Year (MY) runs from October to September.

Combined with the operational stocks at feed mills and starch plants, approximately 1.3 million MT of corn is estimated to have been held in Japan at the end of MY2017/18. With the continuation of the GOJ's contingency reserve program, MY2018/19 and MY2019/20 ending stocks are expected to remain at 1.3 million MT.

Sorghum

Sorghum Production, Supply and Distribution

Sorghum Market Begin Year Japan	2017/2018		2018/2019		2019/2020	
	Oct 2017		Oct 2018		Oct 2019	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	0	0	0	0	0	0
Beginning Stocks	52	52	52	79	52	59
Production	0	0	0	0	0	0
MY Imports	594	577	500	460	500	480
TY Imports	594	577	500	460	500	480
TY Imp. from U.S.	330	244	0	0	0	0
Total Supply	646	629	552	539	552	539
MY Exports	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0
Feed and Residual	594	550	500	480	500	480
FSI Consumption	0	0	0	0	0	0
Total Consumption	594	550	500	480	500	480
Ending Stocks	52	79	52	59	52	59
Total Distribution	646	629	552	539	552	539
Yield	0	0	0	0	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)

Production

While grain sorghum production is negligible, silage sorghum (or sorgo) is produced throughout in Japan. Approximately 618,000 MT of silage sorghum was produced on 14,000 ha in 2018.

Consumption

MY2018/19 feed consumption is expected to decrease to 480,000 MT, down 70,000 MT from last year as corn use in compound and mix feed production has been increasing at the expense of sorghum (See Table 8).⁸ FAS/Tokyo forecasts MY2019/20 sorghum consumption to remain stable at 480,000 MT.

The majority of sorghum is consumed as an ingredient of compound feed in Japan. Due to price competitiveness of corn, feed mills increased use of corn in compound and mixed feed production predominately to replace sorghum. MY2018/19 sorghum feed consumption is estimated to decrease to 480,000 MT as the composition ratio for sorghum in compound and mixed feed production has dropped from 2.3 percent in MY2017/18 to below 2 percent since February 2019. FAS/Tokyo maintains MY2019/20 feed consumption at 480,000 MT because sorghum is used to ensure the preferred white fat in domestic swine and broiler production. FSI consumption is expected to remain below 500 MT in MY2018/19 and MY2019/20.

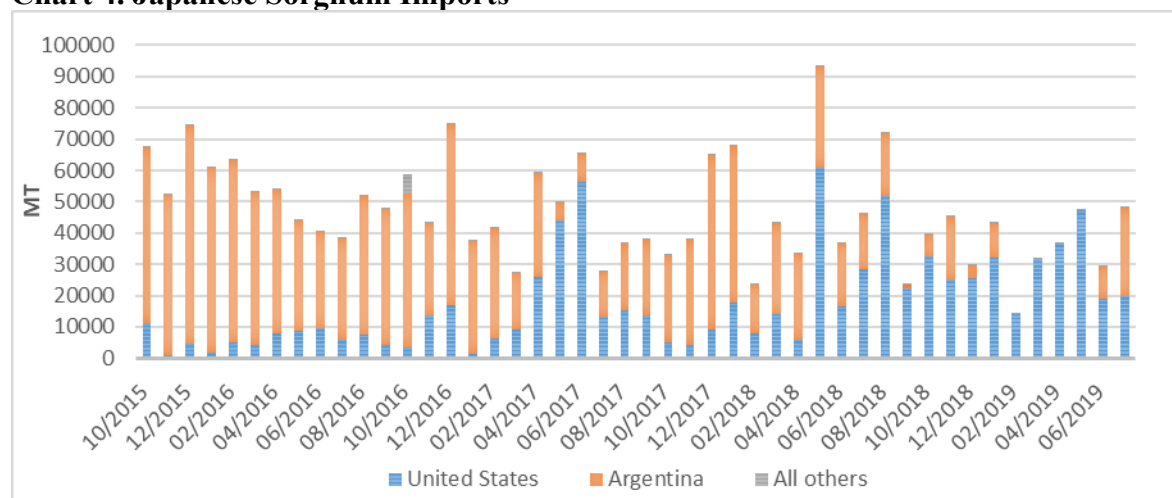
⁸ Sorghum Marketing Year (MY) runs from October to September.

Trade

FAS/Tokyo decreased MY2018/19 imports to 460,000 MT to reflect weaker feed demand and feed mills have been consuming the increased MY2017/18 ending stocks (see [JA9028](#)). MY2019/20 imports are forecast to recover slightly to 480,000 MT.

Argentina had been a dominant sorghum supplier to Japan, however, due to its limited availability, imports from Argentina has decreased while imports from the United States has increased particularly since May 2018 (see Chart 4).

Chart 4. Japanese Sorghum Imports



Source: Global Trade Atlas

Stocks

MY2017/18 ending stocks were raised to 79,000 MT as MY2017/18 imports increased, despite a decline in consumption. As stocks were gradually consumed during MY2018/19 at the expense of imports, FAS/Tokyo expects MY2018/19 ending stocks to return to a normal level at 59,000 MT. MY2019/20 ending stocks are forecast to remain unchanged at 59,000 MT.

Additional Trade Data

Table 1. Japanese Minimum Access Rice Imports

(actual tonnage)

		JFY2012	JFY2013	JFY2014	JFY2015	JFY2016	JFY2017	JFY2018	JFY2019
USA	SBS	40,974	20,046	3,804	19,909	56,438	58,783	33,936	
	OMA	281,000	300,000	316,000	300,000	278,000	266,000	286,000	
	Total	321,974	320,046	319,804	319,909	334,438	324,783	319,936	
	Share	47.4%	47.1%	47.2%	47.2%	49.3%	47.8%	47.2%	
Thailand	SBS	4,870	11,173	5,596	6,276	6,283	5,968	7,614	
	OMA	245,564	300,933	290,174	299,458	327,275	228,846	273,616	9,376
	Total	250,434	312,106	295,770	305,734	333,558	234,814	281,230	
	Share	36.9%	45.9%	43.6%	45.1%	49.2%	34.6%	41.5%	
Australia	SBS	23,873	26,244	559	1,285	6,861	30,702	13,203	
	OMA	35,000	12,000	12,000	-	-	36,000		
	Total	58,873	38,244	12,559	1,285	6,861	66,702	13,203	
	Share	8.7%	5.6%	1.9%	0.2%	1.0%	9.8%	1.9%	
	CSQ							1,120	1,719
China	SBS	28,164	714	780	736	2,396	2,240	1,214	
	OMA	13,000		48,000	49,000	-	48,000	60,000	
	Total	41,164	714	48,780	49,736	2,396	50,240	61,214	
	Share	6.1%	0.1%	7.2%	7.3%	0.4%	7.4%	9.0%	
Other	SBS	2,119	2,662	867	1,109	1,336	2,307	2,577	
	OMA	5,000	6,000	-	-	-			
	Total	7,119	8,662	867	1,109	1,336	2,307	2,577	
	Share	1.0%	1.3%	0.1%	0.2%	0.2%	0.3%	0.4%	
Total	SBS	100,000	60,839	11,606	29,315	73,314	100,000	58,544	-
	OMA	579,564	618,933	666,174	648,458	605,275	578,846	619,616	9,376
	Total	679,564	679,772	677,780	677,773	678,589	678,846	678,160	-
	CSQ							1,120	1,719

Source: MAFF

Table 2. Japanese Food Wheat Imports between January and July

	January - July						
	Quantity (MT)			% Share			% Change
	2017	2018	2019	2017	2018	2019	2019/2018
United States	1,754,509	1,467,168	1,386,979	54.22	46.99	46.95	- 5.47
Canada	947,266	1,159,421	1,036,015	29.28	37.13	35.07	- 10.64
Australia	529,058	493,441	528,228	16.35	15.80	17.88	7.05
France	4,726	2,510	2,556	0.15	0.08	0.09	1.83
Germany	40	20	146	0.00	0.00	0.00	630.00
All others	51	8	15	0.00	0.00	0.00	87.5
Total	3,235,650	3,122,568	2,953,939	100.00	100.00	100.00	- 5.40

Source: Global Trade Atlas

Table 3. CIF Unit Prices of Japanese Food Wheat Imports between January and July

	January - July			
	Unit Value (US\$/MT)			% Change
	2017	2018	2019	2019/2018
United States	248.24	272.51	278.87	2.33
Canada	310.31	307.9	291.94	- 5.18
Australia	249.56	298.47	305.64	2.40
France	552.24	562.45	551.06	- 2.03
Germany	727.57	1100.39	619.36	- 43.71
World	267.09	290	288.5	- 0.52

Source: Global Trade Atlas

Table 4. Japanese Pasta Imports between January and July

	January - July						
	Quantity (MT)			% Share			% Change
	2017	2018	2019	2017	2018	2019	2019/2018
Italy	44055	39206	41609	41.60	39.14	41.45	6.13
Turkey	30790	28779	29292	29.08	28.73	29.18	1.78
China	9603	9755	9340	9.07	9.74	9.30	- 4.26
United States	11378	11524	9060	10.74	11.51	9.02	- 21.38
All others	10071	10894	11088	9.51	10.88	11.05	87.5
Total	105897	100158	100389	100.00	100.00	100.00	0.23

Source: Global Trade Atlas

Table 5. CIF Unit Prices of Japanese Pasta Imports between January and July

	January - July			
	Unit Value (US\$/MT)			% Change
	2017	2018	2019	2019/2018
Italy	1187.49	1244.51	1132.18	- 9.03
Turkey	2989.59	2935.56	2889.83	- 1.56
China	895.11	862.59	838.93	- 2.74
United States	1407.73	1420.48	1390.63	- 2.10
World	1374.46	1426.58	1366.62	- 4.20

Source: Global Trade Atlas

Table 6. Japanese Food Barley Imports between January and July

	January - July						
	Quantity (MT)			% Share			% Change
	2017	2018	2019	2017	2018	2019	2019/2018
Australia	77,645	96,877	78,744	55.99	59.57	53.68	- 18.72
Canada	40,937	48,740	46,920	29.52	29.97	31.98	- 3.73
United States	18,060	14,946	21,031	13.02	9.19	14.34	40.71
All others	2,034	2,076	6	0.00	0.00	0.00	87.5
Total	138,676	162,639	146,701	100.00	100.00	100.00	- 9.80

Source: Global Trade Atlas

Table 7. CIF Unit Prices of Japanese Food Barley Imports between January and July

	January - July			
	Unit Value (US\$/MT)			% Change
	2017	2018	2019	2019/2018
Australia	276.43	337.57	334.32	- 0.96
Canada	301.85	334.36	332.81	- 0.46
United States	450.64	563.42	531.51	- 5.66

Source: Global Trade Atlas

Table 8. Japanese Compound and Mixed Feed Formula

(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	-	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	-	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	-	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%	1.0%	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%
Oct	1,015,014	47,058	38,245	17,480	73,183	69,825	12,500	46,346	261,744	98,955	442,653	2,123,003
	47.8%	2.2%	1.8%	0.8%	3.4%	3.3%	0.6%	2.2%	12.3%	4.7%	20.9%	100.0%
Nov	990,482	46,145	36,690	16,500	69,957	69,583	12,137	45,793	266,006	96,712	423,231	2,073,236
	47.8%	2.2%	1.8%	0.8%	3.4%	3.4%	0.6%	2.2%	12.8%	4.7%	20.4%	100.0%
Dec	1,062,121	46,103	36,671	17,985	74,560	71,055	12,887	49,040	271,333	103,093	449,577	2,194,425
	48.4%	2.1%	1.7%	0.8%	3.4%	3.2%	0.6%	2.2%	12.4%	4.7%	20.5%	100.0%
2019 Jan	956,358	39,050	32,410	15,653	66,606	63,203	11,000	44,931	244,625	91,370	396,413	1,961,619
	48.8%	2.0%	1.7%	0.8%	3.4%	3.2%	0.6%	2.3%	12.5%	4.7%	20.2%	100.0%
Feb	912,859	36,073	30,211	14,715	64,213	59,953	10,602	43,176	230,516	87,110	381,648	1,871,076
	48.8%	1.9%	1.6%	0.8%	3.4%	3.2%	0.6%	2.3%	12.3%	4.7%	20.4%	100.0%
Mar	975,026	38,441	32,315	15,677	68,376	64,875	11,119	46,195	245,512	92,819	409,078	1,999,433
	48.8%	1.9%	1.6%	0.8%	3.4%	3.2%	0.6%	2.3%	12.3%	4.6%	20.5%	100.0%
Apr	1,013,882	38,244	32,387	16,081	72,748	60,507	12,106	42,938	259,101	96,794	434,308	2,079,096
	48.8%	1.8%	1.6%	0.8%	3.5%	2.9%	0.6%	2.1%	12.5%	4.7%	20.9%	100.0%
May	988,210	36,477	31,468	14,875	68,530	57,924	11,227	41,856	253,244	92,655	416,674	2,013,140
	49.1%	1.8%	1.6%	0.7%	3.4%	2.9%	0.6%	2.1%	12.6%	4.6%	20.7%	100.0%
Jun	911,685	34,078	28,914	13,558	63,715	53,181	10,224	37,824	233,902	84,570	381,862	1,853,513
	49.2%	1.8%	1.6%	0.7%	3.4%	2.9%	0.6%	2.0%	12.6%	4.6%	20.6%	100.0%

Source: MAFF