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Report Highlights:

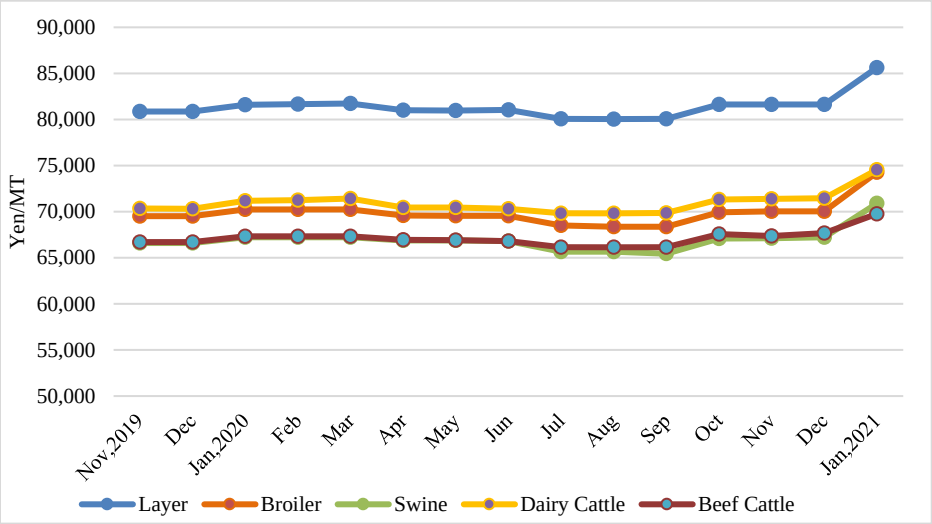
FAS Tokyo estimates stable feed demand in MY2020/21, but projects a slight shift from corn to rice, wheat, and barley in compound feed rations due to high corn prices. FAS Tokyo projects total MY2020/21 wheat imports to drop slightly to 5.55 million tons after consecutive bumper wheat crops and weakened demand for food wheat. FAS Tokyo estimates MY2020/21 total rice consumption to remain consistent with last year at 8.25 million tons, with an increase in feed consumption expected to offset continued declines in table rice consumption.

Executive Summary: Japan Feed Market

Compound and mixed feed production increased 0.8 percent to 24.1 million tons in MY2019/20, exceeding the 24 million metric tons mark for the first time since MY2012/13 (Appendix Table 1). Based on FAS Tokyo projections that livestock inventories will expand slightly in 2021, overall feed demand is projected to remain stable despite slight declines in layer and broiler inventories (Appendix Table 2) (JA2021-0026). Japanese cattle producers have increased herd size in recent years with the support of MAFF's "cattle increase program" (JA2019-0209), which is designed to help Japanese producers compete against imports and to increase exports for Japanese beef and dairy products.

A combination of bullish Chinese demand for grains and oilseeds and weak domestic demand for cornstarch and cooking oils is driving up input costs for Japanese feed mills. A large Japanese feed mill raised the retail compound feed price for January - March 2021 by 6.2 percent (3,900 yen/tons) from the previous quarter (October – December 2020). This is the largest increase since the October and December 2012 period when feed mills raised the compound feed price 4,350 yen/ton after severe drought in the United States resulted in a price surge for corn and other feed ingredients. Despite increasing prices for corn, FAS Tokyo expects feed mills to only shift roughly 100,000 tons of corn to other inputs and for a safety net program to mitigate the impact of price increases passed along to livestock producers.

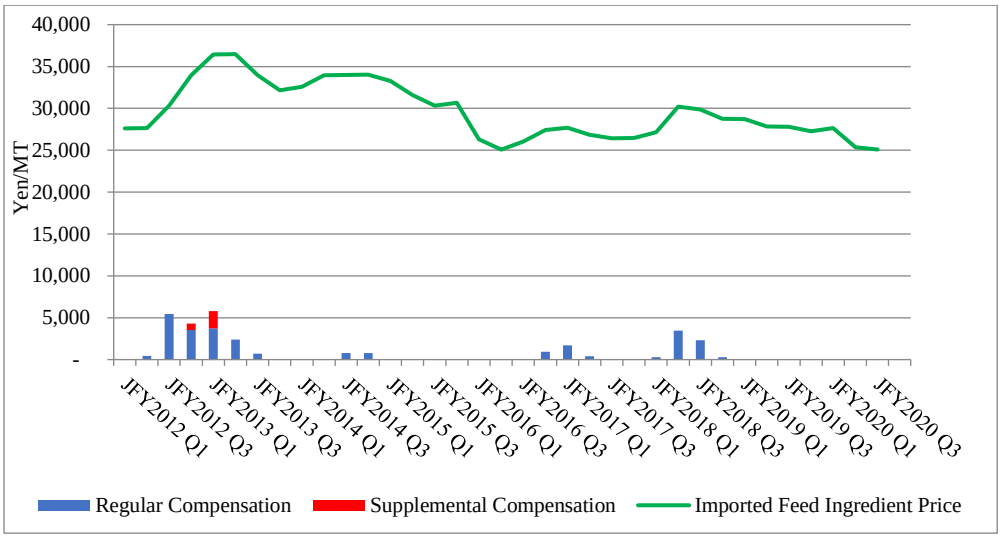
Chart 1. Retail Prices of Compound Feed in Japan



Source: MAFF

Japan operates a compound feed price stabilization system which consists of a "regular compensation program," and a "supplemental compensation program." When the average import price of ingredients (corn, sorghum, soybean meal, barley, and wheat) in a particular quarter exceeds the average import price of ingredients of the last 12 months (hereinafter referred to as "the standard price"), the program compensates livestock producers for the difference. Livestock producers and compound feed manufacturers both contribute to the fund used to compensate producers when prices increase. Livestock producers are compensated through the regular compensation program when feed prices are 115 percent of the standard price. Livestock producers are compensated through the supplemental fund when the average import price in a particular quarter exceeds 115 percent of the standard price, of which MAFF contributes 50 percent of available funding and industry the remaining 50 percent.

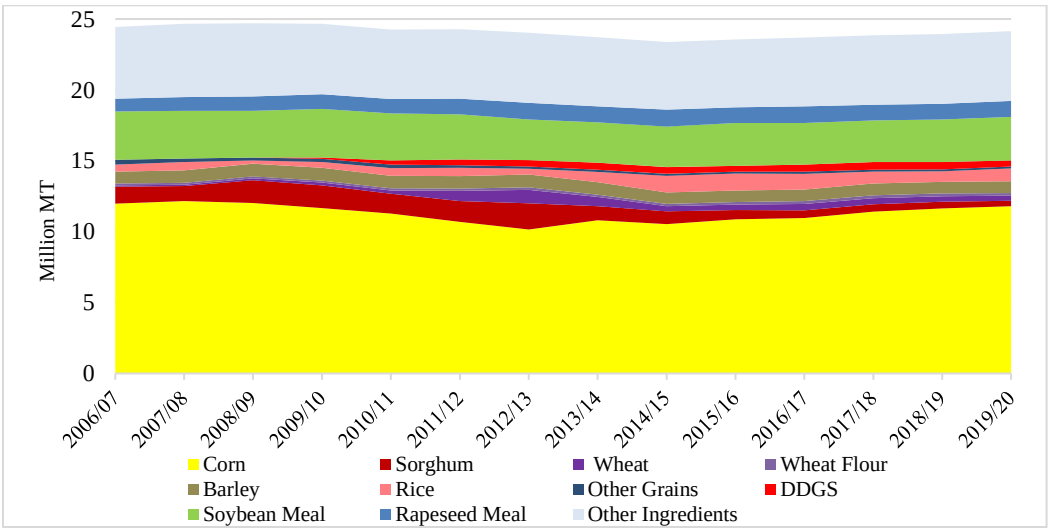
Chart 2. Compound Feed Price Stabilization Compensation Payments



Source: MAFF

The compound feed price stabilization program has not made any compensation payments since the first quarter of Japanese fiscal year (JFY)[1]2019. However, with the price for feed ingredients on the rise, industry sources expect the regular compensation payment to be triggered for the fourth quarter of JFY2020 (January – March 2021).

Chart 3. Japanese Compound and Mixed Feed Production



Source: MAFF

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

Corn

Production, Supply and Distribution

Corn	2019/2020		2020/2021		2021/2022	
Market Year Begins	Oct 2019		Oct 2020		Oct 2021	
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)	1445	1445	1385	1386	0	1340
Production (1000 MT)	2	3	3	4	0	4
MY Imports (1000 MT)	15888	15888	15600	15750	0	15900
TY Imports (1000 MT)	15888	15888	15600	15750	0	15900
TY Imp. from U.S. (1000 MT)	10051	0	0	0	0	0
Total Supply (1000 MT)	17335	17336	16988	17140	0	17244
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)	12300	12400	12000	12300	0	12350
FSI Consumption (1000 MT)	3650	3550	3650	3500	0	3550
Total Consumption (1000 MT)	15950	15950	15650	15800	0	15900
Ending Stocks (1000 MT)	1385	1386	1338	1340	0	1344
Total Distribution (1000 MT)	17335	17336	16988	17140	0	17244
Yield (MT/HA)	2	3	3	4	0	4

(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 2021/2022 = October 2021 - September 2022

Production

Japanese production of corn for grain is still negligible but has steadily increased in recent years. Harvested area and production increased to 693 hectares and 3,617 tons respectively in MY2020/21, up from 443 hectares and 2,927 tons in MY2019/20. MAFF includes corn for grain in support payment programs to encourage a production shift from table rice to other crops (JA2021-0031). FAS Tokyo forecasts corn for grain production to increase to 850 hectares and 4,400 tons and in MY2021/22.

Consumption

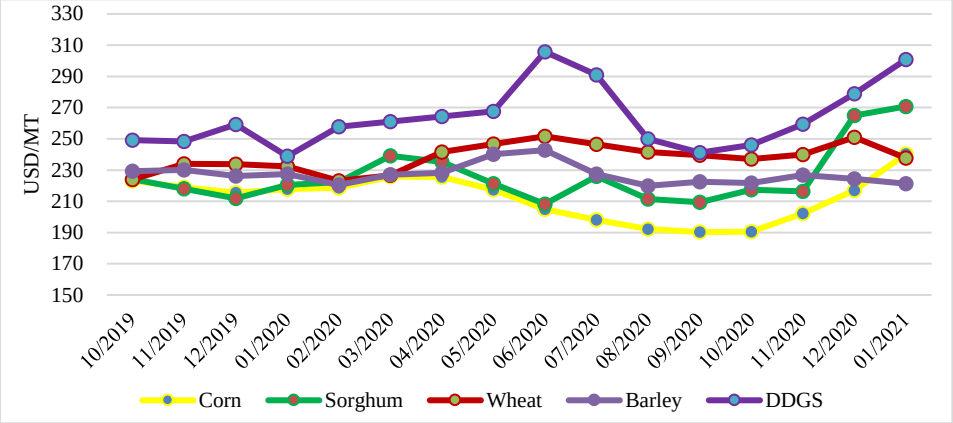
Driven by relative price competitiveness, corn used in compound and mixed feed production increased 1.3 percent to 11.8 million tons in MY2019/20 (Appendix Table 1), the most since MY2008/09. FAS Tokyo increases the MY2019/20 feed and residual consumption estimate, including compound, mixed, and on-farm feed, to 12.4 million tons.

Due to current high corn prices (Chart 4), industry sources expect Japanese feed mills to increase the use of wheat, barley, and rice at corn's expense and FAS Tokyo lowers the MY2020/21 feed consumption projection for corn to 12.3 million tons. FAS Tokyo forecasts an increase in MY2021/22 feed consumption to 12.35 million tons assuming a recovery in corn's price competitiveness.

FAS Tokyo lowers the MY2019/20 Food, Seeds, and Industrial (FSI) consumption estimate to 3.55 million tons due to reduced cornstarch demand. MAFF estimates high fructose corn syrup (HFCS) production decreased 3.5 percent in MY2019/20, reflecting stagnant soft drink consumption as a result of reduced vending machine and convenience store purchases and reduced opening hours of restaurants as a result of COVID-19 related restrictions. FAS Tokyo expects MY2020/21FSI consumption to fall

further to 3.5 million tons in based on dwindling cornstarch demand but forecasts consumption to recover slightly to 3.55 million tons in MY2021/22.

Chart 4. CIF Unit Prices for Feed Grains and Dried Distillers Grains with Solubles (DDGS)



Source: MAFF

Trade

MY2019/20 corn imports decreased one percent to 15.89 million tons from the previous year due mostly to diminished cornstarch demand. The United States and Brazil are the primary corn suppliers to Japan (Appendix Table 3). In MY2019/20, Brazil's market share jumped 26 percent to 37 percent on price competitiveness against U.S. corn, whose market share fell to 62 percent.

With rising U.S. corn price rises and planting delays in Brazil, Japanese importers may increase imports from other suppliers, such as South Africa, in MY2020/21. FAS Tokyo lowered MY2020/21 imports to 15.75 million tons due to anticipated suppressed feed use and weak FSI demand. With an anticipated recovery in feed and cornstarch demand, FAS Tokyo forecasts MY2021/22 imports to increase to 15.9 million tons.

Stocks

FAS Tokyo forecasts MY2020/21 and MY2021/22 ending stocks to remain stable at 1.34 million tons, including approximately 850,000 tons of the government's imported feed corn reserves.

Sorghum

Production, Supply and Distribution

Sorghum	2019/2020		2020/2021		2021/2022	
Market Year Begins	Oct 2019		Oct 2020		Oct 2021	
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)	21	21	22	37	0	27
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	426	426	400	320	0	320
TY Imports (1000 MT)	426	426	400	320	0	320
TY Imp. from U.S. (1000 MT)	226	214	0	0	0	0
Total Supply (1000 MT)	447	447	422	357	0	347
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)	425	410	400	330	0	320
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	425	410	400	330	0	320
Ending Stocks (1000 MT)	22	37	22	27	0	27
Total Distribution (1000 MT)	447	447	422	357	0	347
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 2021/2022 = October 2021 - September 2022

Production

Japan’s grain sorghum production is negligible.

Consumption

Feed millers process most of Japan’s imported sorghum into feed rations. FAS Tokyo lowers estimated MY2019/20 consumption to 410,000 tons based on a 17 percent decrease in sorghum use in compound and mixed feed production in MY2019/20 (Appendix Table 1) as its price was less competitive against corn (Chart 4). FAS Tokyo expects MY2020/21 consumption to decrease further to 330,000 tons based on high prices continuing to suppress demand. Feed mills are expected to substitute some sorghum with rice in compound feed production. MY2021/22 consumption is forecast at 320,000 tons.

Trade

FAS Tokyo expects MY2020/21 sorghum imports to drop to 320,000 tons on the projected decrease in demand for feed sorghum. FAS Tokyo forecasts MY2021/22 imports to remain at 320,000 tons. The United States and Argentina are Japan’s dominant sorghum suppliers, but Japanese importers may look to Australia for supplies as bullish Chinese demand pushes prices up on U.S. and Argentine sorghum.

Stocks

FAS Tokyo expects MY 2020/21 sorghum stocks to fall to 27,000 tons and then remain stable at 27,000 tons in MY2021/22 as demand for sorghum continues to fall.

Barley

Production, Supply and Distribution

Barley	2019/2020		2020/2021		2021/2022	
Market Year Begins	Oct 2019		Oct 2020		Oct 2021	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	61	61	62	62	0	64
Beginning Stocks (1000 MT)	281	281	294	318	0	268
Production (1000 MT)	220	224	250	220	0	195
MY Imports (1000 MT)	1253	1253	1150	1250	0	1250
TY Imports (1000 MT)	1253	1253	1150	1250	0	1250
TY Imp. from U.S. (1000 MT)	28	30	0	0	0	0
Total Supply (1000 MT)	1754	1758	1694	1788	0	1713
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	1050	1000	1150	0	1100
FSI Consumption (1000 MT)	410	390	410	370	0	380
Total Consumption (1000 MT)	1460	1440	1410	1520	0	1480
Ending Stocks (1000 MT)	294	318	284	268	0	233
Total Distribution (1000 MT)	1754	1758	1694	1788	0	1713
Yield (MT/HA)	3.6066	3.6721	4.0323	3.5484	0	3.0469

(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 2021/2022 = October 2021 - September 2022

Production

The 220,000 ton MY2020/21 barley harvest marked Japan's second consecutive bumper crop. Although yield was six percent lower than last year's record, favorable weather conditions drove yields 18 percent above the five-year average. The harvested area increased 2,150 hectares to 63,630 hectares on increased glutinous barley production. In recent years, Japanese producers have adopted new varieties of beta glucan-rich glutinous barley to meet domestic demand and reduce reliance on imports.[2] FAS Tokyo forecasts a small increase in MY2021/22 harvested area to 64,400 hectares driven by demand for glutinous barley, but a small drop in production to 195,000 tons, assuming a return to average yields.

The private sector trades domestic barley through pre-plant sales auctions and the spot market. Producer groups auction 30 - 40 percent of the planned production in September of each year and then processers purchase the remainder through the spot market prior to planting. Reflecting increased domestic production and stock from MY2019/20 and MY2020/21, demand was weak at the MY2021/22 crop auctions. Successful bid prices fell by 0.4 percent for six row barley, 7.8 percent for two row barley, and by 2.9 percent for hulless barley. However, since most barley is produced in rotation with rice and soybeans in paddy fields and supported by government backed safety net programs that compensate for lost revenue (JA2021-0031), the MY2021/22 planting area is expected to increase marginally, driven by glutinous barley production.

Consumption

Cattle are the predominant consumer of feed barley and based on expanding cattle inventories and barley's relative price competitiveness, FAS Tokyo expects feed demand to rise to 1.15 million tons in

[2] Japanese producers now plant two row, six row, and hulless varieties of beta glucan rich glutinous type barley.

MY2020/21. FAS Tokyo forecasts MY2021/22 feed consumption to decrease to 1.1 million tons assuming a drop in corn prices.

FAS Tokyo lowers the MY2019/20 FSI consumption to 390,000 tons as production of barley *shochu* (distilled liquor) fell due to weak demand from the food service industry. Use of barley as a rice extender also fell in line with declining rice consumption.[3] Production of barley *miso* (fermented soybean paste) also decreased. FAS Tokyo expects MY2020/21 FSI consumption to decrease further to 370,000 tons based on decreasing production of barley *miso,* barley tea, and use of barley as a rice extender. FAS Tokyo forecasts MY2021/22 FSI consumption to increase slightly to 380,000 tons as demand for *miso, shochu,* and barley tea recovers after COVID-19 related restrictions are lifted.

Glutinous barley demand has been on the rise since MY2016/17 as awareness for its health benefits spread in Japan. Glutinous barley popularity rose as a rice extender but is now common in noodles and bread. After consumption peaked in MY2018/19, glutinous barley consumption fell in the MY2019/20, but FAS Tokyo expects this established demand to remain stable in MY2020/21 and MY2021/22.

Trade

FAS Tokyo expects MY2020/21 total barley imports to be 1.25 million tons, unchanged from MY2019/20. Strong demand for feed is expected to balance out a drop in food barley imports, stemming from high ending stocks from MY2019/20. FAS Tokyo forecasts MY2021/22 total imports to remain flat at 1.25 million tons based on a balanced reversal in food and feed demand from MY2020/21.

Australia and Canada are the primary suppliers of food barley to Japan. Japanese imports of U.S. barley are predominantly glutinous barley, which totaled 29,813 tons in MY2019/20 after peaking at 35,910 tons in MY2018/19. Glutinous barley imports could face competition from domestic varieties as domestic production of glutinous barley increases.

Australia and Canada are also Japan's predominant feed barley suppliers and based on export availability and price competitiveness FAS Tokyo does not expect this to change in MY2020/21.

Free Trade Agreements

In addition to the 1.369 million ton WTO tariff rate quota (TRQ), Japan established TRQs for 1) food barley, 2) barley flour, groats, and pellets, and 3) food preparations of barley under the Japan-EU Economic Partnership Agreement (EPA) and the Comprehensive and Progressive Trans-Pacific Partnership Agreement (CPTPP) with reduced in-quota markups. Japan also applies the markup reduction to imports from CPTPP Member States and the EU within the WTO TRQ. There are no TRQs for barley products within the U.S.-Japan Trade Agreement (USJTA), but the same markup reduction applies to imports from the United States within the WTO TRQ.

In JFY2020 (by February 2021), Japan imported 20,000 of the 35,000 ton CPTPP TRQ for food barley from Australia.

MAFF no longer requires importers to import feed barley from Japan-EU EPA and CPTPP member states through the state trading enterprise. Since Canada and Australia are the dominant suppliers, the private sector now imports most feed barley.

[3] Barley rice extenders can contain both glutinous and non-glutinous barley.

Stocks

FAS Tokyo estimates that bumper crops increased MY2019/20 ending stocks to 318,000 tons. FAS Tokyo expects excess stocks to decline to 268,000 tons in MY2020/21 and to 233,000 tons in MY2021/22.

Malt

Japanese malt production is limited and Japan imports approximately 500,000 tons of malt each year, mainly from Canada, Australia, the United Kingdom, France and Germany. Imports decreased 9.6 percent to 452,000 tons in MY2019/20, reflecting both weak beer and whisky consumption and exports. Japan sets the WTO TRQ volume for malt imports semi-annually to meet demand. Imports within the WTO TRQ are duty free. In addition to the WTO TRQs, Japan established TRQs for malt under USJTA, the Japan-EU EPA, and CPTPP. Importers have not utilized these TRQs to date and continues to import all malt within the WTO TRQs.

Wheat

Production, Supply and Demand

Wheat	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jul 2019		Jul 2020		Jul 2021	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	212	212	212	213	0	213
Beginning Stocks (1000 MT)	1081	1081	1204	1204	0	1104
Production (1000 MT)	1100	1100	1100	990	0	920
MY Imports (1000 MT)	5682	5682	5600	5550	0	5750
TY Imports (1000 MT)	5682	5682	5600	5550	0	5750
TY Imp. from U.S. (1000 MT)	2680	2680	0	0	0	0
Total Supply (1000 MT)	7863	7863	7904	7744	0	7774
MY Exports (1000 MT)	289	289	280	290	0	290
TY Exports (1000 MT)	289	289	280	290	0	290
Feed and Residual (1000 MT)	650	650	600	700	0	650
FSI Consumption (1000 MT)	5720	5720	5700	5650	0	5700
Total Consumption (1000 MT)	6370	6370	6300	6350	0	6350
Ending Stocks (1000 MT)	1204	1204	1324	1104	0	1134
Total Distribution (1000 MT)	7863	7863	7904	7744	0	7774
Yield (MT/HA)	5.1887	5.1887	5.1887	4.6479	0	4.3192

(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 2021/2022 = July 2021 - June 2022

Production

MY2020/21 marked the second consecutive wheat bumper crop. Following the record yield in MY2019/20, MY2020/21 production decreased 10 percent to 990,000 tons on 212,600 hectares of harvested area. However, the MY2020/21 yield was still nearly five percent above the five-year average owing to favorable weather conditions. FAS Tokyo expects the harvested area to remain unchanged at 213,000 hectares in MY2021/2 and production to be 920,000 tons assuming a return to average yields. Domestic production meets only 15 percent of Japanese wheat and wheat product demand.

Similar to barley, the private sector trades domestic wheat through pre-plant sales auctions and the spot market. Producer groups auction 30 - 40 percent of the planned production volume by variety and the remaining volume will is on the spot market based prior to planting. Improving quality and consumer

preference for domestic products has driven increased demand and price for Japanese wheat each year since MY2016/17. However, domestic wheat stocks are high after consecutive bumper crops and because wheat product manufacturers are not able to easily substitute domestic wheat for imports due to differences in protein contents and qualities. This led to a 12.8 percent drop in the average successful bid price at auction for the MY2021/22 crop, although prices remained above where they were in MY2019/20 and preceding years. However, the planting area is forecast to remain unchanged as wheat is produced in rotation with other crops and reductions in producers are incentivized to expand wheat production (JA2021-0031).

In JFY2021 MAFF will implement a new support payment program, "Wheat, Barley, and Soybeans Profitability and Productivity Improvement Project," that will provide up to half the costs for building storage facilities and to purchase of equipment and machinery to improve production (JA2021-0031). Since crop rotation limits a significant expansion of wheat acres producer groups have facilitated yield increases through cultivar breed improvements and improvements in paddy field drainage.

Consumption

FAS Tokyo expects a small increase, to 700,000 tons, in MY2020/21 feed consumption as wheat becomes competitive against rising corn prices (Chart 4). MY2021/22 feed consumption is forecast to decrease to 650,000 tons assuming a future drop in corn prices.

FAS Tokyo expects MY2020/21 FSI consumption to fall 1.2 percent to 5.65 million tons as declines in in food service demand outpace strong household consumption. FAS Tokyo forecasts a marginal recovery to 5.7 million tons for MY2021/22 FSI consumption on projected increases in the food service sector after COVID-19 related restrictions are lifted.

Population declines and per-capita reductions in wheat consumption have driven a drop in overall consumption since MY2018/19. Domestic industry attributes three main factors related to the COVID-19 pandemic for accelerating this downward trend: (1) food service, which has experienced precipitous declines, generates more food waste than households, leading to greater consumption loss; (2) reduced exercise and movement leading to reduced calorie consumption; and (3) travel restrictions weakening demand for confectionaries and snacks commonly purchased as souvenirs by both foreign and Japanese travelers.

Demand for wheat products[4] such as pasta and instant noodles have been bullish despite overall declines in FSI consumption. With easy preparation, reasonable prices, and a long shelve life, pasta consumption grew 13 percent in MY2019/20. Consumption in the first half of MY2020/21 was 14 percent higher than the same period in MY2019/20. Industry credits expanded product lines of pasta sauces displayed on adjacent retail shelves as helping to stimulate pasta consumption. Pasta consumption is expected to level off as people consume stocked up supplies in the latter half of MY2020/21.

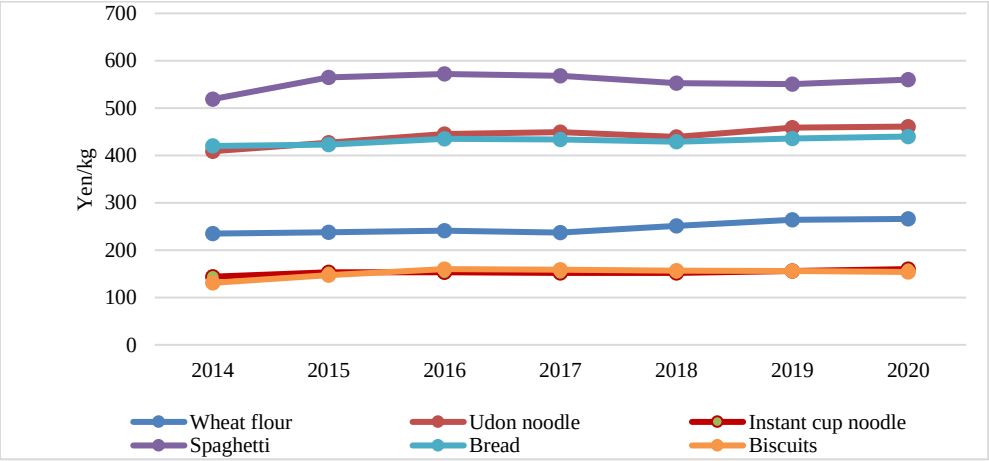
Price

Since Japan relies on imports to meet 85 percent of wheat demand, international prices, freight costs, and exchange rates have a significant effect on domestic market prices. MAFF, acting as a state trading enterprise, is the sole importer of food wheat and sets the wheat sales price every six months. For April

[4] For this report, wheat products includes pasta, wheat flour, and couscous.

– September 2021, MAFF raised the average price for the five major classes of wheat[5] by 5.5 percent, to 51,930 yen per ton, reflecting the increase of the international price and freight costs. Despite changes in wheat prices (Appendix Table 4), retail prices of wheat products have remained fairly stable (Chart 5) as the cost of wheat in the final products is relatively small, accounting for only six percent for loaf bread, one percent for instant noodles, and 24 percent for retail wheat flour. Accordingly, MAFF's wheat sales price increase will have only a marginal effect on wheat products prices.

Chart 5. Retail Prices of Wheat Products in Japan



Source: Ministry of Internal Affairs and Communications
Prices for instant cup noodle is per 77 grams and biscuit is per 100 grams.

Trade

Imports
FAS Tokyo lowers the MY2020/21 total wheat import estimate to 5.55 million tons, a 2.3 percent decrease from MY2019/20 as increased domestic production and weak FSI demand are projected to suppress overall import demand. FAS Tokyo does not anticipate an increase in feed wheat imports to offset a reduction in food wheat imports. FAS Tokyo expects wheat product imports to remain unchanged. With the projected recovery in FSI demand and a return to average yields in domestic production, FAS Tokyo forecasts MY2021/22 total imports to rebound to 5.75 million tons.

Following 18 percent growth in MY2019/20, pasta imports jumped 24 percent in the first half of MY2020/21 over the same period last year. Imports from Turkey and Italy increased 44 percent and 12.6 percent respectively. A strong Japanese Yen combined with tariff reductions under the Japan-EU EPA lowered prices as household consumption demand was on the upswing.

Domestic production and imports each account for roughly 50 percent of the Japanese pasta market. Japan imports approximately 200,000 tons of durum wheat annually from Canada and the United States to make pasta. Japan substantially reduces the markup on durum imports to support domestic pasta production. Despite an increase in demand for pasta, domestic production is operating at capacity and cannot expand production without expanding production lines. Consequently, the share of imports in the pasta market increased to 53 percent in MY2019/20 and to 57 percent in the first half of MY2020/21.

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

Japanese manufacturers produce low carbohydrate and quick-boil pasta to differentiate their products from imports.

Free Trade Agreements – TRQs and Tariff Reductions
Under USJTA, the Japan-EU EPA, and CPTPP, Japan reduced tariffs on various wheat products including pasta, noodles, and biscuits (Appendix Table 5). Japan is expected to increase imports of wheat products as the tariffs are reduced or phased out, reducing domestic production.

Japan also established TRQs and country specific quotas (CSQs) for food wheat and wheat products under these trade agreements. MAFF allocates TRQs and CSQs for state-traded products through tenders held throughout the Japanese fiscal year for, 1) food wheat, 2) wheat flour, pellets, rolled and food preparations, and 3) wheat products. For food wheat, importers utilized all TRQs and CSQs by December 2020 (Appendix Table 6). However, importers have not utilized any of the CPTPP wide TRQ and the EU TRQ for wheat flour, pellets, rolled and food preparations, and wheat products as of February 28, 2021. However, Japan imports approximately 4,400 tons of wheat flour, pellets, rolled and food preparations annually outside these TRQs.

For non-state traded wheat products, MAFF allocates TRQs three times a fiscal year - the first TRQ allocations are in March (for the next fiscal year), and if there are unfilled quotas, MAFF allocates the remaining quotas in July and December. The products include, 1) mixes, doughs and cake mixes, 2) food preparations made primarily of wheat, and 6) *udon, somen* and buckwheat noodles. Mixes, doughs and cake mixes from the EU and food preparations made primarily of wheat from CPTPP member states are in high demand with high TRQ fill rates.

In JFY2020, importers utilized only 17 percent of the USJTA CSQ for mixes, doughs, and cake mixes (Appendix Table 7) (JA2020-0205).

South Korea and China are the major suppliers of various wheat products and preparations to Japan. Under the Regional Comprehensive Economic Partnership Agreement, Japan did not make tariff concessions for wheat products.

MAFF no longer requires importers to import feed wheat from Japan-EU EPA and CPTPP member states through the state trading enterprise.

Exports
FAS Tokyo forecasts MY2020/21 and MY2021/22 exports to remain unchanged at 290,000 tons. Wheat imported for the manufacture of wheat flour, biscuits, and macaroni and spaghetti enters Japan duty and markup free in order to facilitate Japanese exports. MAFF reports that Japanese processors made and exported 156,116 tons of wheat flour, 1,546 tons of biscuit, and 404 tons of spaghetti and macaroni using duty and markup-free wheat in JFY2019.

Stocks

FAS Tokyo increases MY2019/20 ending stocks to 1.2 million tons after consecutive bumper crops. FAS Tokyo estimates stocks will drop to 1.1 million tons in MY2020/21 and in MY2021/22. The stocks include 930,000 tons of imported food wheat the private sector holds as a contingency reserve, equivalent to 2.3 months of demand, of which MAFF subsidizes the storage costs for 1.8 months demand.

Rice

Production, Supply and Demand

Rice, Milled	2019/2020		2020/2021		2021/2022	
Market Year Begins	Nov 2019		Nov 2020		Nov 2021	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1543	1543	1535	1533	0	1525
Beginning Stocks (1000 MT)	2046	2046	1980	2044	0	1966
Milled Production (1000 MT)	7611	7611	7620	7567	0	7580
Rough Production (1000 MT)	10455	10455	10467	10394	0	10412
Milling Rate (.9999) (1000 MT)	7280	7280	7280	7280	0	7280
MY Imports (1000 MT)	707	707	685	685	0	685
TY Imports (1000 MT)	676	676	685	685	0	685
TY Imp. from U.S. (1000 MT)	317	317	0	0	0	0
Total Supply (1000 MT)	10364	10364	10285	10296	0	10231
MY Exports (1000 MT)	34	70	80	80	0	90
TY Exports (1000 MT)	40	70	80	80	0	90
Consumption and Residual (1000 MT)	8350	8250	8270	8250	0	8230
Ending Stocks (1000 MT)	1980	2044	1935	1966	0	1911
Total Distribution (1000 MT)	10364	10364	10285	10296	0	10231
Yield (Rough) (MT/HA)	6.7758	6.7758	6.8189	6.7802	0	6.8275
(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 2021/2022 = January 2022 - December 2022						

The paper expresses rice quantity on a milled basis unless otherwise noted.

Production

MY2020/21 rice production decreased 43,000 tons to 7.57 million tons, and the harvested area decreased 8,700 hectares to 1.53 million total hectares. Like last year, the national average yield was slightly lower than the five years average, but significantly varied by region. Yields were higher in central to northern Japan, including Hokkaido, Tohoku, Hokuriku, and the Kanto regions. Yields were lower in Southwestern Japan as a lack of sunshine hampered grain filling. Brown planthopper and typhoons severely affected yields in Kyushu.

FAS Tokyo forecasts the MY2021/22 harvested area will decrease 7,800 hectares to 1.525 million hectares and production will increase marginally to 7.58 million tons, assuming a return to an average yield.

Rice production in Japan is almost entirely *Japonica* cultivars of short grain rice. As of December 2020, MAFF has graded 80.1 percent of the MY2020/21 crop has as first grade, close to the 80.3 percent five years average. Increased temperatures are affecting grain yield and quality as heat stress reduces grain filling and causses chalkiness in the grains of *Japonica* cultivars. National and prefectural research institutes have developed climate-resilient rice cultivars with an emphasis on heat tolerance for grain filling. These new cultivars performed well in MY2020/21 crop grading inspection demonstrating improved heat tolerance and quality.

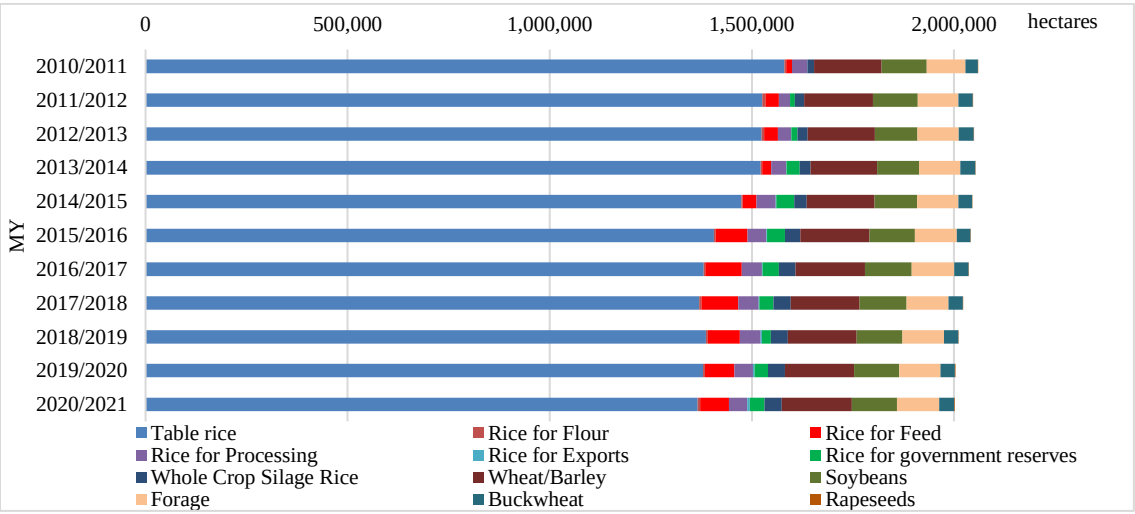
Koshihikari[6] has been the most popular cultivar produced in Japan since 1979, accounting for approximately 30 percent of the total harvested area in MY2020/21, followed by *Hitomebore, Akita Komachi,* and *Hinohikari*. These four cultivars account for 50 percent of the total harvested area. National and prefectural research institutes developed *Koshihikari, Akitakomachi and Hitomebore* cultivars for cold tolerance in northern Japan, but a gradual shift to new climate-resilient cultivars is expected in the coming years.

Policy

As table rice consumption has shrunk year-on-year, MAFF has incentivized a production shift from table rice to other crops, including rice for other purposes. As a result, over the last decade, the harvested area for table rice decreased 214,000 hectares, to 1.366 million hectares, while the harvested area for rice for other purposes increased 134,000 hectares, to 208,000 hectares, as shown in Chart 6. The harvested area for feed rice increased from 14,900 hectares in MY2010/11 to 91,500 hectares in MY2017/18 but then decreased to 71,000 hectares in MY2020/21. Harvested areas for crops other than rice, such as wheat, barley and soybeans have been fairly stable over the same time frame.

With dampened food service demand amid the COVID-19 pandemic further reducing demand for table rice, stocks have been on the rice. To prevent oversupply, MAFF estimates a 300,000 ton (brown rice) reduction in MY2021/22 table rice production is necessary, equivalent to approximately 57,000 hectares planted areas. To further shift production from table rice to other crops, MAFF is increasing conversion support payments for MY2021/22 (JA2021-0031). MAFF's first MY2021/22 planting intention survey published on March 1, 2021 indicates an increase in rice for feed, processing, and exports and a decrease in table rice production.

Chart 6. Crops Harvested Areas in Paddy Fields



Source: MAFF

Rice for government reserves are included in table rice for 2010/2011. Whole Crop Silage Rice is not included in the Production, Supply and Demand in this report. Harvested Areas include areas of double cropping.

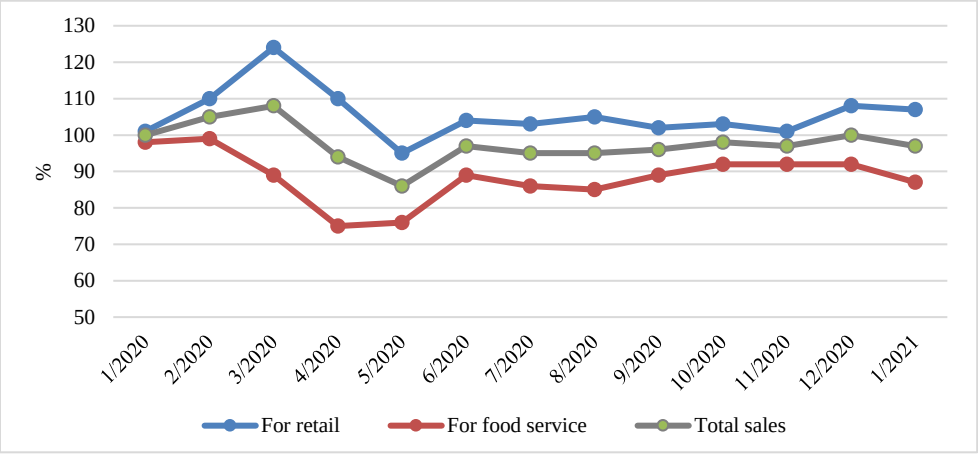
[6]*Koshihikari* is the cultivar name as well as the brand name registered in 1956. *Koshihikari* is easy to fall down and has no blast resistance.

Consumption

FAS Tokyo lowers MY2019/20 consumption to 8.25 million tons as a drop in table rice consumption was greater than earlier estimated, which more than nullified an increase in feed consumption. FAS Tokyo expects MY2020/21 consumption to stay flat at 8.25 million tons, with feed consumption increases offsetting a decrease in table rice and rice for processing consumption. FAS Tokyo forecasts MY2021/22 consumption to fall to 8.23 million tons as table rice consumption is anticipated to continue to decline while feed consumption is projected to remain stable.

MAFF estimates table rice consumption[7] has dropped 200,000 tons (brown) to 7.14 million tons (brown) in 2019/20 (July-June). MAFF attributes the decrease to a drop in food service consumption, which could not offset increased household consumption. As shown in Chart 7, total table rice sales had been recovering until December 2020, but started to decline in January 2021 when Japan instituted a second state of emergency in large cities.

Chart 7. Changes in Table Rice Sales Volumes by Wholesalers

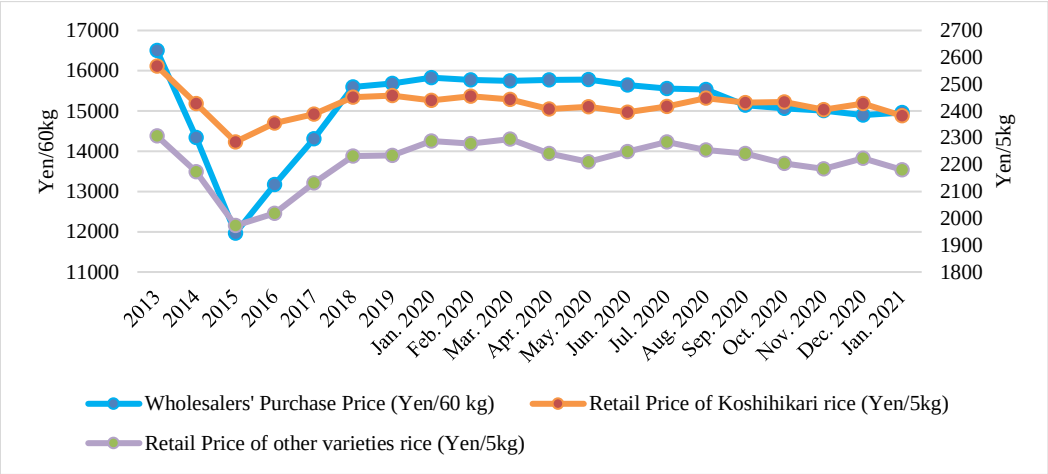


Source: MAFF
Change from the same month from last year

Stagnant table rice consumption has increased private stocks, which has in turn put downward pressure on price. The wholesale purchase price started to fall in June 2020 (Chart 8) and the retail price for cultivars other than *Koshihikari* followed, while the retail price for *Koshihikari* has remained fairly stable (Chart 8).

[7] MAFF defines table rice consumption is the consumption of domestically produced table rice not including imported rice.

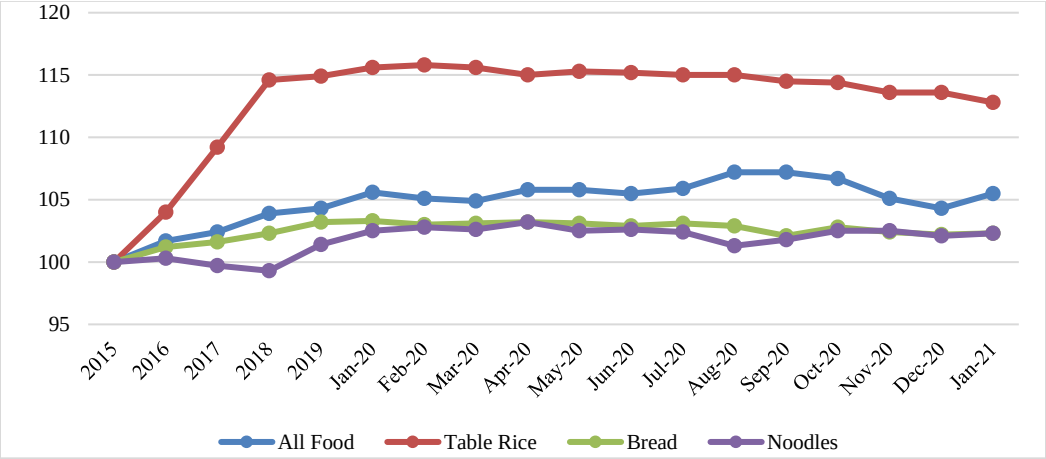
Chart 8. Wholesalers' Purchase Price and Retail Price for Table Rice



Source: MAFF

As shown in Chart 9, the consumer price index (CPI) for all foods excluding perishables increased 4.3 points in 2019 from 2015 while CPI increases for bread and noodles were more modest at 3.2 points and 1.4 points respectively. The CPI increase for rice is significantly high at 11.4 points in 2019, but started a decline in September 2020. A drop in rice prices will not necessarily shore up consumption, as demonstrated in MY2014/15 when the price dropped 17 percent but downward trends table rice consumption was not reversed.

Chart 9. Consumer Price Index (2015 = 100)



Source: Ministry of Internal Affairs and Communications

In CY2020, production of packaged microwavable rice continued to expand, and grew 7.9 percent to 197,185 tons (product base). The growth is attributable to strong household consumption and robust overseas demand. in CY2020, exports of packaged microwavable rice increased 18 percent, to 1,203 tons. Industry expects domestic demand for packaged microwavable rice to slow down as prices are comparatively higher than other cereals such as pasta and noodles.

In CY2020, production of glutinous rice cake (*mochi*) increased 8.7 percent to 66,181 tons (product base), marking the record high since 1999 (55,542 tons) since statistics became available. Industry

sources indicate this rise is due to the convenience and the long shelf life of the product being valued throughout the COVID-19 pandemic. Conversely, in CY2020, production of *nihonshu* (rice wine) decreased 11 percent as consumption fell due to the limited opening hours of restaurants under the COVID-19 state of emergency coupled with weak export demand.

FAS Tokyo estimates MY2019/20 feed consumption increased 16 percent to 1.06 million tons as a result of increased use of rice in compound feed production. Domestically produced rice for feed, government reserves, and Minimum Access rice are used to supply feed production. FAS Tokyo expects MY2020/21 feed consumption will increase further as rice replaces some sorghum and corn in compound feed. FAS Tokyo forecasts MY2021/22 rice for feed consumption will remain stable with the anticipated increase in MY2021/22 domestic feed rice production.

Trade

Imports
FAS Tokyo expects Japan to import approximately 682,000 tons of rice to meet its WTO commitments in JFY 2020. Reflecting bearish food service demand, Japan did not fill its 100,000 ton simultaneous-buy-sell (SBS) rice quota in JFY2020 (Table 8). After eight SBS tenders, 58,493 tons (actual tonnage) of the SBS quota has been filled – 40,321 tons (actual tonnage) (69 percent) from the United States, followed by 6,874 tons (actual tonnage) from Thailand, and 3,651 tons (actual tonnage) from Taiwan. Broken rice accounted for 31.5 percent of the SBS rice (58,493 tons), reflecting strong demand from the processing sector due to small generation of undersized grains rice in MY2020/21. MAFF will utilize the remaining SBS quota of 41,507 tons under the Ordinary Market Access.

Despite a decrease in domestic table rice prices, the markup on SBS rice remained unchanged from JFY2019 at 61 yen/kg (excluding tax) for whole grains and 42 yen/kg (excluding tax) for broken rice in JFY2020. As of March 5, Japan has only filled 595 of the available 6,000 ton Australia rice CSQ established in CPTPP due to Australia's limited export availability.

Exports
Japan exported 50,000 tons (actual tonnage) of rice as food aid in MY2018/19, the latest available MAFF data. Japan's commercial exports of table rice increased by 19.7 percent to 19,558 tons (actual tonnage) in MY2019/20. Assuming similar food aid exports, FAS Tokyo estimates MY2019/20 exports at 70,000 tons. Hong Kong, Singapore, and Taiwan have been the top three export destinations for commercial exports. In these markets, Japanese rice is predominantly consumed at Japanese restaurants and home meal replacement dishes such as rice balls and *sushi*. Exports to the United States and Australia have grown by 517 percent to 1,989 tons and by 293 percent to 1,074 tons respectively for the last five calendar years to CY2020. MAFF regards the United States and Australia as promising growth markets where retails sales dominate Japanese consumption, particularly in the United States where the prices of California short grain rice and Japanese rice have narrowed in recent years.

The GOJ established the Export Expansion Action Strategy for Agriculture, Forestry, Fisheries Products and Food (JA2020-0201) in which the target is set to increase export value of table rice, packaged microwavable rice, rice flour and rice flour products to 12.5 billion yen by CY2025. Exports of these products were 5.2 billion yen in CY2019. To facilitate exports, MAFF designated 34 export focused production areas led by local agricultural cooperatives, rice producers' groups, and rice mills to establish export plans. MAFF will provide assistance to these designated areas to realize their export plans.

Based on this initiative and sluggish domestic demand, FAS Tokyo expects MY2020/21 exports to increase to 80,000 tons assuming the similar food aid exports. As MAFF's first planting intention survey indicates the increase in production of rice for exports in MY2021/22, FAS Tokyo forecasts MY2021/22 exports to increase to 90,000 tons including food aid exports.

Stocks

Due to weak table rice consumption, private stocks increased in MY19/20. Together with MAFF's rice in reserve and OMA rice stocks, FAS Tokyo estimates aggregate ending stocks at 2.044 million tons in MY2019/20. With anticipated increase in feed consumption, FAS Tokyo expects MY2020/21 ending stocks to decrease to 1.966 million tons. MY2021/22 ending stocks are forecast at 1.911 million tons.

Appendix: Additional Data

Table 1. Japan's Compound and Mixed Feed Production

MY	Corn	Sorghum	Wheat	Wheat Flour	Barley	Rice	Other Grains	DDGS	Soybean Meal	Rapeseed Meal	Other Ingredients	TOTAL
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 Oct	1,033,194	29,418	32,276	14,557	73,060	88,669	12,120	37,272	274,900	95,594	414,615	2,105,675
	49.1%	1.4%	1.5%	0.7%	3.5%	4.2%	0.6%	1.8%	13.1%	4.5%	19.7%	100.0%
Nov	983,840	28,327	30,494	13,697	70,223	90,287	11,601	37,345	257,237	92,555	396,957	2,012,563
	48.9%	1.4%	1.5%	0.7%	3.5%	4.5%	0.6%	1.9%	12.8%	4.6%	19.7%	100.0%
Dec	1,123,947	31,948	34,115	16,012	81,798	97,724	13,496	43,149	291,755	106,720	460,329	2,300,993
	48.8%	1.4%	1.5%	0.7%	3.6%	4.2%	0.6%	1.9%	12.7%	4.6%	20.0%	100.0%

Source: MAFF

Table 2. Compound Feed Production by Species (MT)

	Layer	Broiler	Swine	Dairy Cattle	Beef Cattle
CY2018	5,778,326	3,812,657	5,585,415	2,984,424	4,448,606
Cy2019	5,801,586	3,841,660	5,579,169	3,012,807	4,480,357
CY2020	5,758,960	3,825,253	5,722,291	3,056,419	4,554,555
2020/2019	-0.7%	-0.4%	2.6%	1.4%	1.7%

Table 3. Japanese Corn Imports

	MY2017/2018			MY2018/2019			MY2019/20		
	Value (Million USD)	Quantity (MT)	CIF Unit Value (USD/MT)	Value (Million USD)	Quantity (MT)	CIF Unit Value (USD/MT)	Value (Million USD)	Quantity (MT)	CIF Unit Value (USD/MT)
United States	2,543.8	12,062,741	210.88	3,035.9	13,848,736	219.22	2,085.6	9,788,555	213.06
Brazil	541.0	2,838,838	190.56	378.4	1,744,395	216.95	1,233.5	5,889,746	209.43
South Africa	123.3	644,176	191.34	19.4	90,313	214.91	18.0	92,892	194.12
Russia	13.5	71,761	188.03	20.5	97,207	210.90	17.3	76,765	225.41
France	7.3	1,312	5573.34	6.0	1,035	5769.82	7.0	1,354	5175.62
Argentina	5.5	27,874	198.89	54.2	256,986	210.93	5.9	29,026	203.01
All others	10.8	10,893	-	12.6	11,519	-	11.2	9,704	-
Total	3,245.2	15,657,595	207.26	3,527.1	16,050,191	219.75	3,378.5	15,888,042	212.64

Source: Trade Data Monitor

Table 4. MAFF Wheat Sales Prices to Flour Mills

	Sales Price (Yen/MT)	Change
Oct 2014 - Mar 2015	58,330	-0.4%
Apr - Sep 2015	60,070	3.0%
Oct 2015 - Mar 2016	56,640	-5.7%
Apr - Sep 2016	52,610	-7.1%
Oct 2016 - Mar 2017	48,470	-7.9%
Apr - Sep 2017	50,690	4.6%
Oct 2017 - Mar 2018	52,510	3.6%
Apr - Sep 2018	54,370	3.5%
Oct 2018 - Mar 2019	55,560	2.2%
Apr - Sep 2019	54,630	-1.7%
Oct 2019 - Mar 2020	49,890	-8.7%
Apr - Sep 2020	51,420	3.1%
Oct 2020 - Mar 2021	49,210	-4.3%
Apr - Sep 2021	51,930	5.5%

Source: MAFF

Table 5. Japan Pasta, Noodle, and Biscuit Imports

	WTO	USJTA	Japan EU EPA	CPTPP	Imports from all others	Total Imports	Major supplier
Spaghetti and Macaroni							
FY2020 Tariff	30 yen/kg	24 yen/kg	21.82 yen/kg	24 yen/kg			Italy, Turkey, United States
CY2020 Imports		22,675	93,224	3	64,713	180,615	
CY2019 Imports		18,731	76,921	0	50,265	145,917	
Change 2020/2019		21.1%	21.2%	0.0%	28.7%	23.8%	
Pasta containing eggs							
FY2020 Tariff	30 yen/kg	20 yen/kg					Italy
CY2020 Imports		13	282	6	40	341	
CY2019 Imports		20	194	8	30	252	
Change 2020/2019		-35.0%	45.4%	-25.0%	33.3%	35.3%	
Pasta not containing eggs							
FY2020 Tariff	34 yen/kg	27.77 yen/kg	24.73 yen/kg	27.77 yen/kg			China, South Korea, Italy
CY2020 Imports		168	2,474	1,360	22,230	26,232	
CY2019 Imports		146	2,012	1,263	19,946	23,367	
Change 2020/2019		15.1%	23.0%	7.7%	11.5%	12.3%	
Stuffed Pasta							
FY2020 Tariff	5%, 21.3%, 23.8%		3.7%, 15.4%, 17.3%				China, South Korea, Vietnam
CY2020 Imports		36	2,415	301	9,293	12,045	
CY2019 Imports		54	2,027	244	9,148	11,473	
Change 2020/2019		-33.3%	19.1%	23.4%	1.6%	5.0%	
Pasta containing added sugar							
FY2020 Tariff	23.8%	17.3%					Thailand, South Korea
CY2020 Imports		0	6	0	134	140	
CY2019 Imports		0	136	1	282	419	
Change 2020/2019		-	-95.6%	-100.0%	-52.5%	-66.6%	
Instant Ramen and Noodles							
FY2020 Tariff	21.3%	15.4%	15.5%	15.4%			South Korea, Thailand
CY2020 Imports		305	2,327	1,083	18,456	22,171	
CY2019 Imports		578	1,435	392	12,118	14,523	
Change 2020/2019		-47.2%	62.2%	176.3%	52.3%	52.7%	
Biscuit							
FY2020 Tariff	20.4% 15.0% 13.0%	20.4% 7.5% 6.5%	14.8% 7.5% 6.5%	14.8% 7.5% 6.5%			Indonesia, China, Malaysia
CY2020 Imports		603	5,239	5,662	16,324	27,828	
CY2019 Imports		609	4,978	5,366	14,122	25,075	
Change 2020/2019		-1.0%	5.2%	5.5%	15.6%	11.0%	

Source: MAFF, Trade Data Monitor

Table 6. Japan's TRQ/CSQ Allocations for State-Traded Wheat and Wheat Products (MT)

	USJTA	Japan EU EPA	CPTPP			Imports from all others	Total Imports	Major Suppliers
			Canada	Australia	CPTPP Wide			
1. Food Wheat								
JFY2020 TRQ/CSQ	126,000	223	44,333	42,000	-			United States. Canada, Australia
Allocated Quota	126,000	223	44,333	42,000	-			
Fill Rate	100%	100%	100%	100%	-			
CY2020 Imports	2,554,260	7,527	1,672,819	797,212		23	5,031,841	
CY2019 Imports	2,404,673	6,028	1,757,362	888,862		22	5,056,947	
2. Wheat Flour, Pellets, Rolled and Food Preparations								
JFY2020 TRQ	-	3,900	-	-	6,000			Italy, France, India, South Korea
Allocated Quota	-	0	-	-	0			
Fill Rate	-	0%	-	-	0%			
CY2020 Imports	111	2,858			69	1,351	4,389	
CY2019 Imports	106	3,584			74	767	4,531	
3. Wheat Products								
JFY2020 TRQ	-	140	-	-	8,500			Turkey, Brazil, Italy
Allocated Quota	-	0	-	-	0			
Fill Rate	-	0%	-	-	0%			
CY2020 Imports	0	29			0	105	134	
CY2019 Imports	2	91			0	20	111	

Source: MAFF, Trade Data Monitor

Table 7. Japan's TRQ Allocations for Other Wheat Products in JFY2020 and JFY2021* (MT)

	USJTA	Japan EU EPA	CPTPP			Imports from all others	Total Imports	Major Suppliers
			Canada	Australia	CPTPP Wide			
4. Mixes, Doughs and Cake Mixes								
JFY2020 TRQ	11,100	11,920	-	-	7,280			France, South Korea, United States
Allocated Quota	1,900	8,797	-	-	2,421			
Fill Rate	17%	74%	-	-	33%			
JFY2021 TRQ	11,400	12,680	-	-	7,520			
Allocated Quota	1,379	10,294	-	-	2,892			
Fill Rate	12%	81%	-	-	38%			
CY2020 Imports	6,411	13,784			6,110	13,670	39,975	
CY2019 Imports	5,966	12,853			7,540	11,876	38,235	
5. Food Preparations Made Primarily of Wheat								
JFY2020 TRQ	-	2,400	-	-	18,000			South Korea, Singapore, New Zealand
Allocated Quota	-	549	-	-	16,118			
Fill Rate	-	23%	-	-	90%			
JFY2021 TRQ	-	2,600	-	-	19,500			
Allocated Quota	-	1,091	-	-	19,500			
Fill Rate	-	42%	-	-	100%			
CY2020 Imports	565	853			20,860	26,042	48,320	
CY2019 Imports	599	555			19,350	28,289	48,793	
6. Udon, Somen and Buckwheat								
JFY2020 TRQ	-	10	-	-	100			Australia, China
Allocated Quota	-	0	-	-	0			
Fill Rate	-	0%	-	-	0%			
JFY2021 TRQ	-	10	-	-	100			
Allocated Quota	-	0	-	-	0			
Fill Rate	-	0%	-	-	0%			
CY2020 Imports	0	0			16	5	21	
CY2019 Imports	0	0			47	40	87	

Source: MAFF, Trade Data Monitor

*For JFY2021, the first TRQ allocation was completed in March 2021.

Table 8. Japan's Minimum Access Rice Tender Results as of March 5, 20201 (actual tonnage)

		JFY2012	JFY2013	JFY2014	JFY2015	JFY2016	JFY2017	JFY2018	JFY2019	JFY2020
USA	SBS	40,974	20,046	3,804	19,909	56,438	58,783	33,936	55,343	40,321
	OMA	281,000	300,000	316,000	300,000	278,000	266,000	286,000	265,000	229,000
	Total	321,974	320,046	319,804	319,909	334,438	324,783	319,936	320,343	269,321
	Share	47.4%	47.1%	47.2%	47.2%	49.3%	47.8%	47.2%	47.2%	45.8%
Thailand	SBS	4,870	11,173	5,596	6,276	6,283	5,968	7,614	7,521	6,874
	OMA	245,564	300,933	290,174	299,458	327,275	228,846	273,616	276,692	202,030
	Total	250,434	312,106	295,770	305,734	333,558	234,814	281,230	284,213	208,904
	Share	36.9%	45.9%	43.6%	45.1%	49.2%	34.6%	41.5%	41.9%	35.5%
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	-	-	-
	Total	58,873	38,244	12,559	1,285	6,861	66,702	13,203	260	-
	Share	8.7%	5.6%	1.9%	0.2%	1.0%	9.8%	1.9%	0.0%	-
	CSQ							1,120	3,459	595
China	SBS	28,164	714	780	736	2,396	2,240	1,214	2,060	2,120
	OMA	13,000		48,000	49,000	-	48,000	60,000	60,000	99,000
	Total	41,164	714	48,780	49,736	2,396	50,240	61,214	62,060	101,120
	Share	6.1%	0.1%	7.2%	7.3%	0.4%	7.4%	9.0%	9.2%	17.2%
All others	SBS	2,119	2,662	867	1,109	1,336	2,307	2,577	11,359	9,178
	OMA	5,000	6,000	-	-	-	-	-	-	-
	Total	7,119	8,662	867	1,109	1,336	2,307	2,577	11,359	9,178
	Share	1.0%	1.3%	0.1%	0.2%	0.2%	0.3%	0.4%	1.7%	1.6%
Total	SBS	100,000	60,839	11,606	29,315	73,314	100,000	58,544	76,543	58,493
	OMA	579,564	618,933	666,174	648,458	605,275	578,846	619,616	601,692	530,030
	Total	679,564	679,772	677,780	677,773	678,589	678,846	678,160	678,235	588,523
	CSQ							1,120	3,459	595

Source: MAFF

Attachments:

No Attachments