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Japan

Grain and Feed Annual

2019 Grain and Feed Annual

Approved By:
Christopher Riker
Prepared By:
Keiko Fujibayashi

Report Highlights:
Demand for feed ingredients in Japan remains strong in MY2018/19 as livestock inventories have seen little change. Japanese corn imports are expected to hold steady at 15.6 million metric tons (MMT). Unfavorable weather in Japan in 2018 suppressed domestic wheat and barley production, leading to increased opportunities for imports. The weather also led to an increase in the number of smaller-sized rice grains resulting in increased market competition with imports. Japanese sorghum imports are expected to decline as feed mills continue to consume stocks held over from the summer of 2018.

Corn

Corn Production, Supply and Distribution

Corn	2017/2018		2018/2019		2019/2020	
Market Begin Year	Oct 2017		Oct 2018		Oct 2019	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	1	1	1	1	0	1
Beginning Stocks	1323	1323	1393	1391	0	1393
Production	2	2	2	2	0	2
MY Imports	15668	15666	15500	15600	0	15600
TY Imports	15668	15666	15500	15600	0	15600
TY Imp. from U.S.	12072	12071	0	0	0	0
Total Supply	16993	16991	16895	16993	0	16995
MY Exports	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0
Feed and Residual	12000	11900	11900	11900	0	11900
FSI Consumption	3600	3700	3600	3700	0	3700
Total Consumption	15600	15600	15500	15600	0	15600
Ending Stocks	1393	1391	1395	1393	0	1395
Total Distribution	16993	16991	16895	16993	0	16995
Yield	2	2	2	2	0	2
(1000 HA) ,(1000 MT) ,(MT/HA)						

Production

The Government of Japan (GOJ) has been incentivizing feed corn production in an effort to reduce its reliance on imported feed ingredients. As a result, roughly 4.8 million metric tons (MMT) of whole crop silage is produced on 95,000 ha in Japan.[1] Feed corn, however, is planted on significantly less land (reportedly only 240 ha and totaling 1,800 MT in 2017). Farmers face challenges in expanding feed corn production as the cultivation period is longer which leads to an increased risk of red rust disease and a larger volume of residuals (stalks, etc.). As a result, Japanese feed corn production remains quite limited.

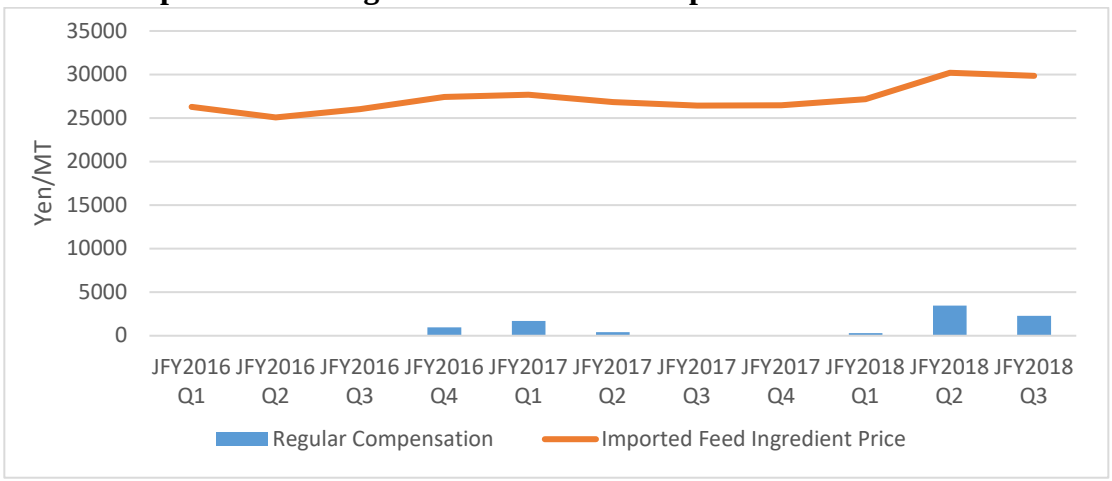
Consumption

Despite an increase in feed prices (see Chart 1), Japanese compound and mixed feed production remained strong in MY2017/18[2], reaching 23.9 MMT, the highest volume since MY2012/13 (see Table 1). Driven by strong demand from the poultry sector, feed production has gradually increased since MY2015/16. Despite a decline in the price of poultry meat and eggs due to increased supply, poultry production continues strong and inventories remain stable. Although continued growth in Japanese feed production may not be achievable, MY2018/19 demand is expected to remain unchanged from MY2017/18.

[1] The majority of Japanese corn is produced in Hokkaido as a rotational crop with wheat and beans on dry fields.

[2] The marketing year (MY) for corn runs from October to September.

Chart 1: Imported Feed Ingredient Price and Compensation

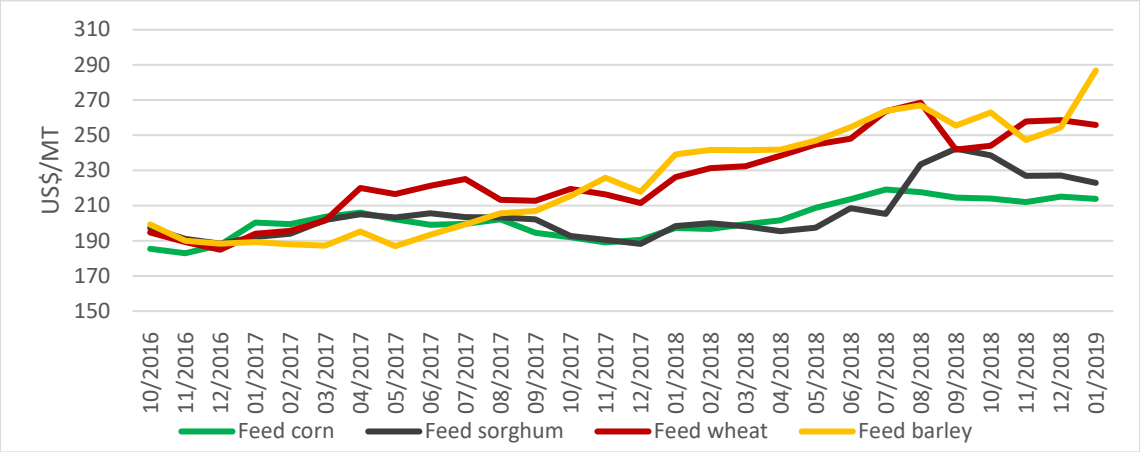


Source: MAFF
Regular compensation is made from the fund contributed by livestock farmers and feed mills.

Due to its relative price competitiveness (see Chart 2), coupled with a shortage of rice for feed (discussed in greater detail below), the composition ratio for corn in Japanese compound and mixed feed increased by 1.6 percent to 47.9 percent, the highest ratio seen since MY2008/09 (i.e., increasing by 460,000 MT to total 11.4 MMT in MY2017/18). Combined with on-farm and other uses, FAS/Tokyo estimates MY2017/18 feed and residual consumption to total 11.9 MMT. As feed demand in Japan is expected to remain stable in the coming year, FAS/Tokyo has maintained MY2018/19 feed and residual consumption at 11.9 MMT, and forecasts similar consumption levels for MY2019/20.

Food, Seed and Industrial (FSI) consumption has been steady, supported, in part, by strong demand from cornstarch producers who use nearly 3.4 MMT of imported corn annually. Based on healthy demand from the Japanese beverage sector, the Ministry of Agriculture, Forestry and Fisheries (MAFF) estimates cornstarch production increased 1.8 percent to 2.3 MMT (3.4 MMT corn equivalent) in MY2017/18. Moreover, as demand for other uses such as manufacturing snacks, flakes, distilled alcohol beverages is expected to remain robust, FAS/Tokyo has increased MY2017/18 FSI consumption to 3.7 MMT (100,000 MT more than the official USDA estimate). MAFF expects cornstarch production to remain relatively flat (down 0.7 percent) in MY2018/19, and FAS/Tokyo also expects demand for corn for other uses to remain unchanged. Accordingly, FAS/Tokyo forecasts FSI consumption to remain flat at 3.7 MMT in MY2018/19 and MY2019/20.

Chart 2: CIF Prices of Corn, Sorghum, Wheat and Barley for Feed



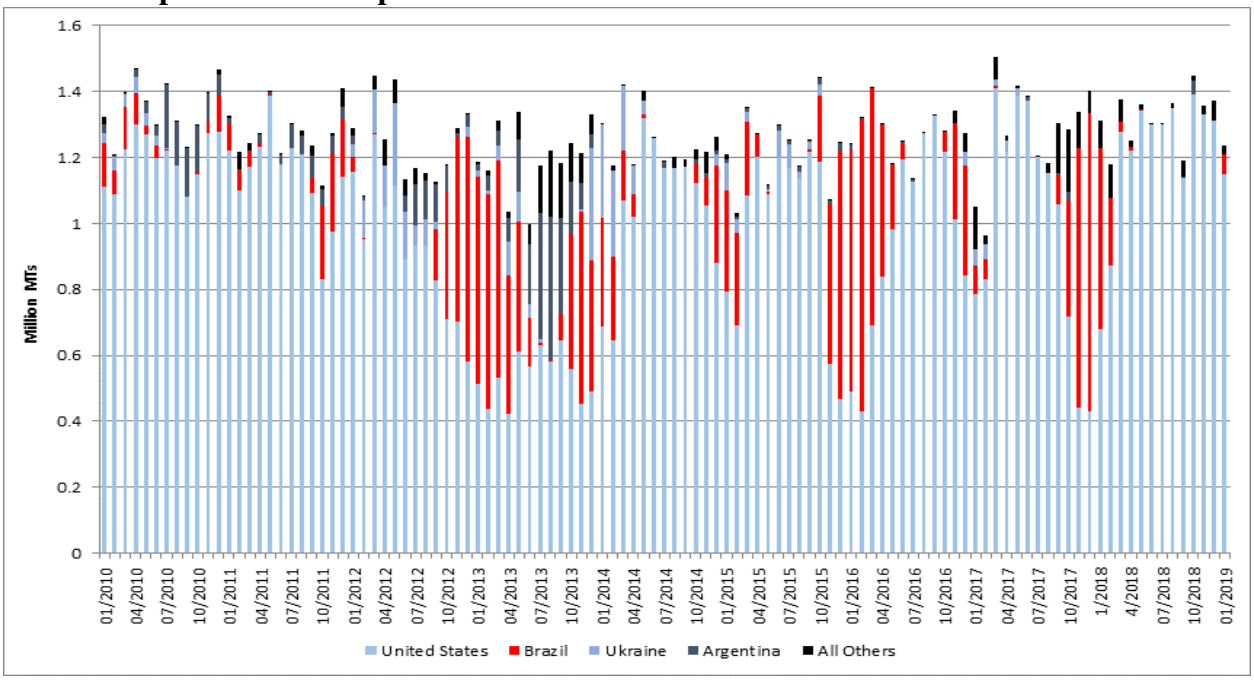
Source: Global Trade Atlas

Trade

The affordability of corn as a feed ingredient encouraged Japanese feed mills to use more corn in MY2017/18, resulting in a 3.3 percent increase in total Japanese corn imports (15.67 MMT) (Table 2). The United States accounted for 77.1 percent of total Japanese corn imports during the marketing year (12.07 MMT) -- down 10.5 percent from MY2016/17 -- due to the price competitiveness of Brazilian corn (imports of which increased 205.5 percent to 2.84 MMT).

However, the United States has significantly increased its share of corn imports thus far in MY2018/19. Through the first four months of the marketing year, the United States accounted for 96 percent of Japanese corn imports, compared to 42 percent during the same period of the previous marketing year. Brazil accounted for just one percent of Japanese corn imports in the first four months of MY2018/19, compared to 49 percent during the same period in MY2017/18 (see Chart 3). This four-month trend, however, may not continue given expected yield improvements in Brazil coupled with an expansion of Brazil's safrinha corn area (see e.g., BR1817).

Chart 3: Japanese Corn Imports



Source: Global Trade Atlas

As feed and FSI demand is expected to remain stable, FAS/Tokyo anticipates MY2018/19 and MY2019/20 imports to total 15.6 MMT.

Stocks

Corn accounts for the majority of the 850,000 MT of feed materials the GOJ holds for its contingency reserve program. Together with the operational stocks held at feed mills and starch plants, approximately 1.4 MMT 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 MY 2019/20 ending stocks are expected to remain at 1.4 MMT.

Sorghum

Sorghum Production, Supply and Distribution

Sorghum	2017/2018		2018/2019		2019/2020	
Market Begin Year	Oct 2017		Oct 2018		Oct 2019	
Japan	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	94	0	54
Production	0	0	0	0	0	0
MY Imports	594	592	600	500	0	540
TY Imports	594	592	600	500	0	540
TY Imp. from U.S.	330	253	0	0	0	0
Total Supply	646	644	652	594	0	594
MY Exports	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0
Feed and Residual	594	550	600	540	0	540
FSI Consumption	0	0	0	0	0	0
Total Consumption	594	550	600	540	0	540
Ending Stocks	52	94	52	54	0	54
Total Distribution	646	644	652	594	0	594
Yield	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA)						

Production

Sorghum production is negligible in Japan.

Consumption

Sorghum is often considered as a substitute to corn in the Japanese compound feed formula. Due to corn's price competitiveness and Japanese feed mill preference for corn over sorghum, the volume of sorghum consumed in compound and mixed feed in Japan has declined year-on-year since MY2013/14[3] (Table 1). As the use of sorghum in compound and mixed feed fell further in MY2017/18, FAS/Tokyo decreased its MY2017/18 feed and residual consumption forecast to 550,000 MT.

As some producers in the Japanese swine and poultry industries prefer to feed sorghum to make pork and chicken fat whiter and more attractive to consumers, consumption of sorghum as a feed ingredient is largely contingent upon demand from these sectors. With a small decline in Japanese swine inventories anticipated in MY2018/19 (see JA9023), MY2018/19 and MY2019/20 feed and residual consumption is expected to decrease marginally to 540,000 MT.

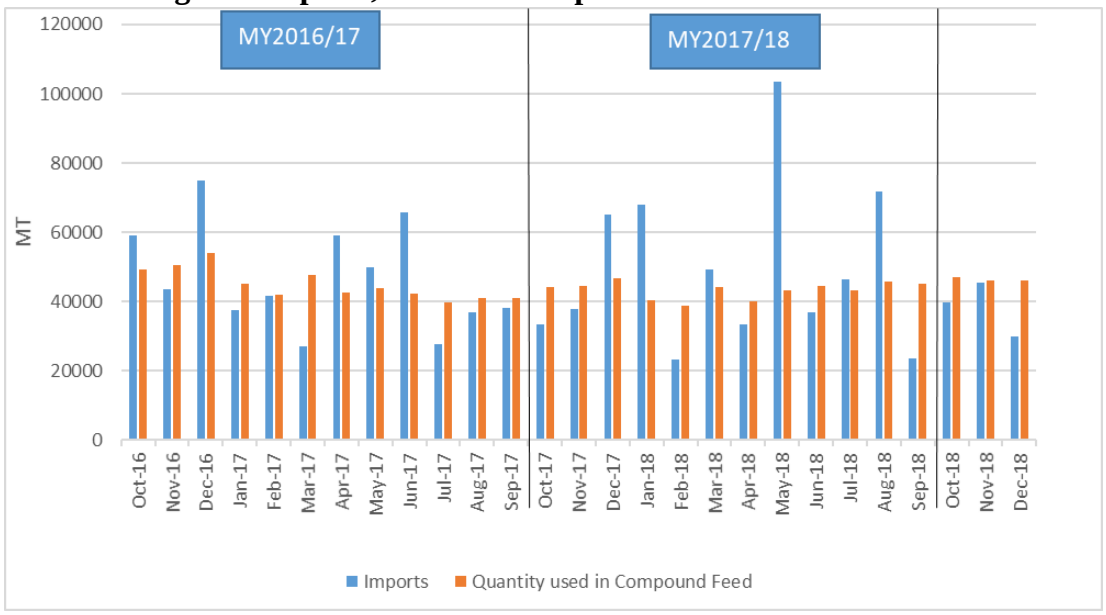
According to industry sources, sorghum for FSI consumption is fluctuating as prospective buyers test the grain's functionality in foods. Because of this, food grain consumption is estimated at approximately 350 MT in calendar year 2018. FAS/Tokyo expects FSI consumption will remain below 500 MT (reflected as zero in the PSD table due to rounding) in MY 2018/19 and MY 2019/20.

[3] The marketing year (MY) for sorghum runs from October to September.

Trade

Despite a decrease in sorghum consumption in feed, Japanese sorghum imports increased 5.6 percent to 592,479 MT in MY2017/18. This increase was attributable, in large part, to Japan's purchase of a 69,748 MT shipment of U.S. sorghum in May 2018 that was originally destined for China following China's temporary decision to impose additional duties on U.S. sorghum (see CH18029).

Chart 4. Sorghum Imports, Feed Consumption



Source: Global Trade Atlas, MAFF

While Argentina continued to be the largest supplier of sorghum to Japan in MY2017/18, accounting for 57 percent of Japanese imports, the United States increased its import share by 3.7 percent to 42.7 percent. Despite increased sorghum supplies, feed consumption declined, resulting in increased MY2017/18 ending stocks. FAS/Tokyo expects MY2018/19 imports to decrease to 500,000 MT as excess stocks are consumed (trade in the first four months of the marketing year was down 22.5 percent from previous marketing year's levels). However, given the eventual decline in stocks, and in order to meet demand, MY2019/20 imports are forecast to rebound to 540,000 MT.

Stocks

As sorghum imports increased while consumption decreased, operational stocks at feed mills and grain terminals swelled in MY2017/18. Accordingly, FAS/Tokyo increased its MY2017/18 ending stock estimate to 94,000 MT. However, as sorghum stocks are consumed in MY 2018/19 at the expense of imports, FAS/Tokyo forecasts a return to normal levels. MY2019/20 ending stocks are forecast to remain unchanged at 54,000 MT.

Barley

Barley Production, Supply and Distribution

Barley	2017/2018		2018/2019		2019/2020	
Market Begin Year	Oct 2017		Oct 2018		Oct 2019	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	61	61	62	61	0	61
Beginning Stocks	309	309	261	328	0	331
Production	186	186	178	173	0	180
MY Imports	1253	1253	1100	1260	0	1250
TY Imports	1253	1253	1100	1260	0	1250
TY Imp. from U.S.	34	28	0	0	0	0
Total Supply	1748	1748	1539	1761	0	1761
MY Exports	0	0	0	0	0	0
TY Exports	0	0	0	0	0	0
Feed and Residual	1107	1030	960	1030	0	1030
FSI Consumption	380	390	380	400	0	400
Total Consumption	1487	1420	1340	1430	0	1430
Ending Stocks	261	328	199	331	0	331
Total Distribution	1748	1748	1539	1761	0	1761
Yield	3.0492	3.0492	2.871	2.8361	0	2.9508
(1000 HA) ,(1000 MT) ,(MT/HA)						

Production

Barley is a conversion crop or a rotational crop planted after rice in Japan. Because the GOJ offers support payments to barley farmers (see JA8018 and JA7027), the planted area for barley in Japan has remained stable at roughly 61,000 ha per year since MY2014/15[4]. The MY2018/19 barley planted area in Japan fell slightly from MY2017/18 levels (down 0.5 percent) to 61,030 ha, but still fell within recent norms. Although the planting area decreased marginally, production levels fell 6.3 percent (to 173,200 MT) in MY2018/19 due to unfavorable weather conditions in Hokuriku, the major production region for six-row barley. Yields in Hokuriku fell 23 percent as heavy snow delayed the spring thaw resulting in fewer ears.

The planted area for naked barley increased 9.3 percent to 5,430 ha as farmers looked to take advantage of the increasing popularity of glutinous barley. As a result, Japanese glutinous barley production increased eight percent to 13,700 MT in MY 2018/19. Meanwhile, the planted area and production volume for two-row barley remained virtually unchanged.

With the continuation of the government's support payments for the production of barley, Japan's MY2019/20 planted area is expected to remain unchanged at 61,000 ha, and total production is projected at 180,000 MT (assuming normal weather conditions).

Consumption

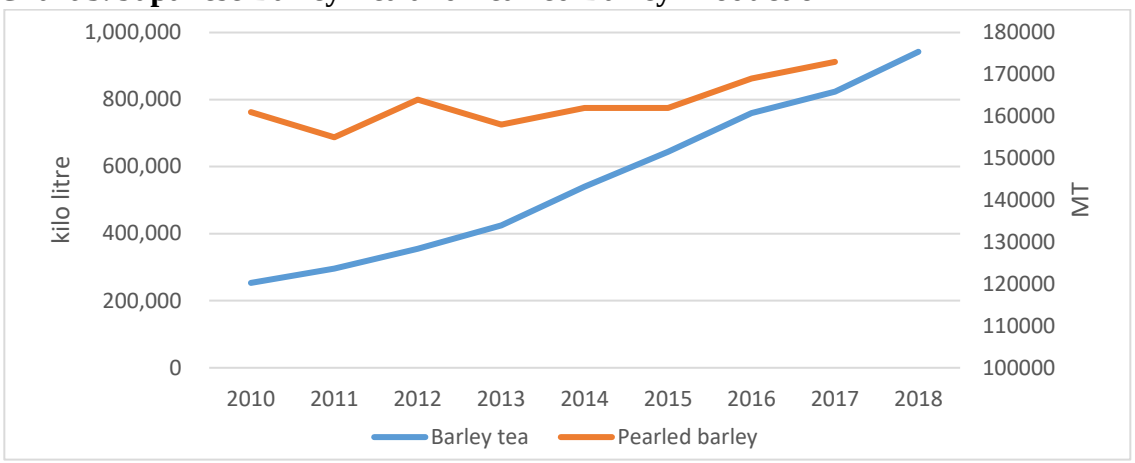
Despite increasing prices, feed consumption for barley remained strong in MY2017/18 and is estimated to have totaled 1.03 MMT. As production of Japanese beef cattle, the major consumer of barley for feed, is expected to remain flat in MY 2018/19 (see JA9023), FAS/Tokyo has

[4] The marketing year (MY) for barley runs from October to September.

forecast feed consumption unchanged at 1.03 MMT. MY2019/20 feed and residual consumption is also forecast unchanged.

Food, Seeds and Industrial (FSI) consumption was strong in MY2017/18, led by the continued growth in popularity of glutinous barley (mainly consumed as a rice extender), as well as increasing production of barley tea. Barley tea production has increased year-on-year since 2010 (see Chart 5), moving from a drink predominantly consumed in summer to one that is consumed year-round (MAFF data shows barley tea production increased 14.5 percent in 2018). The production of pearled (hull-less) barley, predominantly used as a rice extender, has also been on the rise. Based on increased production of barley tea and pearled barley, FAS/Tokyo has increased MY2017/18 FSI consumption 2.6 percent to 390,000 MT (10,000 MT higher than the most recent official USDA estimate). As FSI demand is expected to continue to grow slowly, FSI consumption is projected to increase to 400,000 MT in MY2018/19 and remain unchanged at 400,000 MT in MY2019/20.

Chart 5. Japanese Barley Tea and Pearled Barley Production



Source: MAFF

Trade

Reflecting strong demand, food barley imports increased 18.6 percent to 292,028 MT, and feed barley imports were up one percent to 960,658 MT in MY2017/18. As a result, total Japanese barley imports increased 4.7 percent to 1.25 MMT. In response to the reduction in MY2018/19 production, and given expected strong feed and FSI consumption, FAS/Tokyo expects MY2018/19 imports to increase to 1.26 MMT. MY2019/20 imports, however, are forecast to decrease to 1.25 MMT as domestic production recovers.

Australia has been the dominant supplier of both feed and food barley to Japan, accounting for 83 percent and 63 percent of imports, respectively, in MY2017/18 (followed by Canada at nine percent and 27 percent, respectively). As a glutinous barley supplier, the United States increased food barley exports to Japan in recent years, and its share of Japanese food barley imports increased significantly in the first four months of MY2018/19 (Table 5). However, the recently concluded Comprehensive and Progressive Agreement for Trans-Pacific Partnership agreement

(CPTPP) and Japan-EU Economic Partnership Agreement (EPA) has improved market access for U.S. competitors.

Barley within the WTO tariff rate quotas (TRQ) is imported duty-free under the state trading system, and the GOJ collects a mark-up when selling imported barley to buyers. Effective December 30, 2018, Japan established a CPTPP quota, which increases from 25,000 MT in Year 1 to 65,000 MT in Year 9 of the agreement. Japan also lowered the mark-up within the CPTPP quota, and reduced tariffs on barley products imported from CPTPP Member States. Similar mark-up and tariff cuts were made for European Union (EU) Member States when the Japan-EU EPA came into effect on February 1, 2019. A second round of mark-up/tariff cuts will come into effect April 1, 2019 for both CPTPP and EU Member States. Also, feed barley imports from the EU and CPTPP countries have been shifted from the state trading system to the private sector where a mark-up will no longer be collected. For more information on these mark-up and tariff reductions, see JA8042.

Stocks

Japanese feed mills reported they were holding 92,000 MT of barley as operational stocks as of September 2018. Combined with the stocks at port terminals, the GOJ's regular contingency reserve program, on-farm stocks, and food barley stocks at food processors, total Japanese ending stocks are forecasted at 331,000 MT in MY2018/19, and MY2019/20.

Rice

Rice Production, Supply and Distribution

Rice, Milled	2017/2018		2018/2019		2019/2020	
Market Begin Year	Nov 2017		Nov 2018		Nov 2019	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	1557	1557	1560	1550	0	1550
Beginning Stocks	2410	2410	2167	2228	0	1947
Milled Production	7787	7787	7700	7652	0	7800
Rough Production	10696	10696	10577	10511	0	10714
Milling Rate (.9999)	7280	7280	7280	7280	0	7280
MY Imports	685	686	685	685	0	685
TY Imports	670	670	685	685	0	685
TY Imp. from U.S.	0	324	0	0	0	0
Total Supply	10882	10883	10552	10565	0	10432
MY Exports	60	55	70	58	0	60
TY Exports	60	55	70	58	0	60
Consumption and Residual	8655	8600	8600	8560	0	8480
Ending Stocks	2167	2228	1882	1947	0	1892
Total Distribution	10882	10883	10552	10565	0	10432
Yield (Rough)	6.8696	6.8696	6.7801	6.7813	0	6.9123
(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

In MY2018/19[5], attracted by high table rice prices, Japanese farmers increased the planted area for table rice. However, Japan's total rice planted area decreased 0.5 percent (to 1.55 million ha) due to a decrease in the planted area for feed rice and rice for GOJ reserves (see Table 7).

Due to unfavorable weather during the growing season, MY2018/19 average yields declined 1.2 percent to 4.9 MT/ha. This in turn, led to a 1.7 percent decline in production (7.65 MMT). Yields were noticeably down in northern Japan where low temperatures coupled with a lack of sunshine from mid-June to mid-July decreased the volume of rough rice in Hokkaido. A lack of sunshine from mid-September until harvest also suppressed grain filling, and led to smaller grains and reduced yields in Akita, Yamagata and Niigata Prefectures. Additionally, the Kanto region suffered from a severe summer heatwave that thickened hulls and led to smaller grains.

The unfavorable weather generated a significant amount of middle-sized grains[6] in MY 2018/19, reportedly 10 percent more than in MY2017/18. Rather than being sold in single-variety table rice retail packages, middle-sized grains are traded at lower prices, blended with standard-sized grains, and often used by the foodservice and home meal replacement sectors. The increased availability of middle-sized grains suppressed demand for imported rice which can be a less expensive alternative to higher priced domestic rice.

As previously noted, Japanese farmers increased the planted area for table rice in MY2018/19, but an increase in total production was nullified by unfavorable weather. Nevertheless, as table rice prices remain high in Japan, MAFF is concerned about the possibility of an oversupply of table rice in MY2019/20 as farmers seek to again capitalize on prices. Accordingly, MAFF is increasing support payments to farmers to encourage them to plant other crops or rice for purposes other than table rice beginning in Japanese fiscal year (JFY) 2019 (April 1, 2019-March 31, 2020) (see Table 8 and JA8018). Nevertheless, FAS/Tokyo forecasts Japan's total MY2019/20 rice planted area to remain unchanged (at 1.55 million ha), and production to increase to 7.8 MMT (assuming normal weather).

Consumption

Table rice consumption has declined year-on-year in Japan since 1962. While MAFF has been promoting production and consumption of rice for purposes other than table rice (such as rice for feed, rice flour and exports), table rice still accounts for the majority of Japanese rice consumption (approximately 80 percent of the total supply). Because of rising prices, Japanese food manufacturers and the foodservice industry have reportedly decreased serving portions of rice in lieu of passing price increases on to their customers (which has helped to accelerate the decrease in consumption). With the declining Japanese population, MAFF estimates table rice

[5] The marketing year (MY) for rice runs from November to October.

[6] Japanese farmers separate rice into three categories by size: 1) standard, 2) middle-size, and 3) undersized and broken (smaller than 1.7 mm), which are distributed to separate markets. Normally standard rice is sold for retail, middle-sized grains are sold for the foodservice industry or for blends, and undersized grains are sold for processing.

consumption to decrease 36,400 MT (0.5 percent) to 6.7 MMT in MY2018/19, and by a further 91,000 MT (1.4 percent) to 6.6 MMT in MY2019/20.

MY2017/18 rice used in compound and mixed feed production decreased 25 percent to 824,000 MT (actual tonnage) as strong demand from manufacturers (for the production of crackers, miso, etc.) reduced the amount of rice available for feed in the GOJ's stocks. Together with on-farm use, feed and residual consumption is estimated to have totaled roughly 845,000 MT (actual tonnage) in MY2017/18. As the similar level of rice is anticipated to be supplied to feed, feed consumption is expected to remain unchanged in MY2018/19 and MY2019/20.

Based on projected decrease in table rice consumption, FAS/Tokyo forecasts total rice consumption in Japan will decline to 8.56 MMT in MY2018/19, and to 8.48 MMT in MY2019/20.

Trade

Demand for imported rice has been weak in JFY2018, with only 58,444 MT of the Simultaneous Buy and Sell (SBS) rice import quota having been filled as of March 6, 2019 -- 33,936 MT (58 percent) from the United States, followed by 13,203 MT (22.6 percent) from Australia, and 7,614 MT (13 percent) from Thailand (see Table 9)[7]. According to industry sources, demand for SBS rice was low because less expensive middle-sized grains are increasingly available in MY2018/19, and some importers and users are still consuming SBS rice imported in MY2017/18.

Although Japan's 100,000 MT SBS rice quota is not expected to be fully utilized this fiscal year, Japan is still expected to import nearly 700,000 MT of rice to meet its WTO commitments. In addition to the WTO-established minimum access quota, a 6,000 MT country-specific quota (CSQ) was established to import state-traded rice and rice products (such as rice flour) from Australia under CPTPP. Australia's JFY2018 CSQ volume totals 2,000 MT (prorated for four months until March 31, 2019) of which 1,120 MT was awarded as of March 15, 2019.

Though still small, Japanese commercial rice exports have grown year-on-year as MAFF continues its promotion efforts. MY2017/18 commercial exports increased 15.6 percent (to 13,452 MT), led by exports to Hong Kong, Singapore and the United States. Together with food aid exports of rice, MY2017/18 total rice exports are estimated at 55,000 MT. With MAFF's promotion efforts expected to continue, Japanese rice exports are expected to continue to increase (to 58,000 MT in MY2018/19 and to 60,000 MT in MY2019/20).

Stocks

The GOJ held 910,000 MT (actual tonnage) of domestically produced rice as a contingency reserve as of June 2018. In principle, the GOJ holds approximately one MMT[8] of domestically produced rice by purchasing 200,000 MT annually, holding it for five years, and selling the five-

[7] The unfilled SBS quota that remained after the March 6th SBS tender was awarded will be converted to OMA rice purchases.

[8] One MMT is considered the level that enables the GOJ to supply the necessary reserves to balance supply and demand (assuming a poor harvest in two consecutive years).

year-old rice for processing, feed, or donating it as food aid. For JFY2019, the GOJ intends to purchase 209,140 MT through tenders, increasing its purchase volume by 9,140 MT (to offset increased Australian imports resulting from the CPTPP)[9]. MY2018/19 and MY2019/20 ending stocks are expected to total roughly two MMT when combining GOJ-held ordinary market access (OMA) stocks and privately held stocks.

Wheat

Wheat Production, Supply and Distribution

Wheat	2017/2018		2018/2019		2019/2020	
Market Begin Year	Jul 2017		Jul 2018		Jul 2019	
Japan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested	213	212	213	212	0	212
Beginning Stocks	1210	1210	1181	1231	0	1211
Production	972	972	870	880	0	950
MY Imports	5876	5876	5800	5920	0	5850
TY Imports	5876	5876	5800	5920	0	5850
TY Imp. from U.S.	2994	2937	0	0	0	0
Total Supply	8058	8058	7851	8031	0	8011
MY Exports	277	277	270	280	0	280
TY Exports	277	277	270	280	0	280
Feed and Residual	750	750	680	740	0	730
FSI Consumption	5850	5800	5850	5800	0	5800
Total Consumption	6600	6550	6530	6540	0	6530
Ending Stocks	1181	1231	1051	1211	0	1201
Total Distribution	8058	8058	7851	8031	0	8011
Yield	4.5634	4.5849	4.0845	4.1509	0	4.4811
(1000 HA) ,(1000 MT) ,(MT/HA)						

Production

While Japan's MY2018/19[10] wheat planted area decreased marginally to 211,900 ha, production is estimated to have fallen 9.5 percent (to 880,000 MT) due to bad weather in Hokkaido (where over 60 percent of Japanese wheat is produced). Low temperatures from mid-June to mid-July coupled with a lack of sunshine hampered the ripening of winter wheat grains in Hokkaido, resulting in the island's yields falling 20 percent from MY2017/18 levels. Bad weather also affected the quality of wheat in MY2018/19. As of December 2018, MAFF's grade inspection results indicated 13.5 percent of the 2018 crop was classified as off-grade.

Because the GOJ is expected to continue support payments for wheat farmers (see JA8018, JA7027), and because domestic wheat remains popular in Japan , FAS/Tokyo forecasts Japan's MY2019/20 wheat planting area to remain unchanged in MY2019/20 at 212,000 ha. However, production is forecast to increase by nearly eight percent, to 950,000 MT (assuming average weather conditions).

[9] As a CPTPP countermeasure, the GOJ commits to purchase the CSQ-equivalent amount of domestic rice for the GOJ reserves in addition to its normal purchases, in order to mitigate the impact of increased imports on the Japanese table rice market.

[10] Wheat Marketing Year (MY) runs from July to June.

Consumption

Based on stable wheat flour production in Japan and unchanged wheat product import volumes, food wheat consumption is forecast to continue to total 5.8 MMT in MY2018/19 and MY2019/20.

Demand for feed wheat has also been strong. Based on the amount of wheat and wheat flour used in the production of compound and mixed feed as well as on-farm, MY2017/18 feed and residual consumption is estimated at 750,000 MT. However, because Japanese swine inventories are expected to marginally decline (see JA9023), and because swine are the primary livestock in Japan consuming feed wheat (65 percent of feed wheat), feed and residual consumption is forecast to decrease slightly to 740,000 MT in MY2018/19. MY2019/20 feed and residual consumption is forecast to total 730,000 MT (assuming swine inventories continue their marginal decline).

Trade

To counterbalance the nearly 10 percent reduction in MY2018/19 domestic wheat production, FAS/Tokyo increased its MY2018/19 wheat and wheat product[11] import forecast from 5.8 MMT to 5.92 MMT. Reflecting an anticipated recovery in production, however, MY2019/20 imports are forecast to decrease to 5.85 MMT.

Japanese wheat product exports[12], of which wheat flour accounts for more than 80 percent, totaled 277,000 MT (wheat equivalent) in MY2017/18, unchanged from the previous year. Based on a 2.2 percent increase in exports for the first seven months of MY 2018/19 (led by instant ramen and other noodles), FAS/Tokyo raised its marketing year wheat product export forecast to 280,000 MT. FAS/Tokyo forecasts MY2019/20 exports to remain at 280,000 MT.

Wheat is a state traded item, and imported by MAFF thorough tenders. MAFF imports wheat duty-free and sells wheat to flour millers at the imported price, plus a markup (and the markup is used to promote domestic wheat production). Effective December 30, 2018, Japan established country specific quotas for Canada and Australia (see JA7153 for details of the CSQs). Japan lowered the mark-up on state traded wheat, and reduced tariffs on wheat products imported from CPTPP Member States, including wheat competitors such as Canada and Australia. Similar tariff cuts were made for EU Member States when the Japan-EU EPA came into effect on February 1, 2019. A second round of cuts will come into effect April 1, 2019 for both CPTPP and EU Member States. Also, as is the case for feed barley, feed wheat imports from the EU and CPTPP countries have been shifted from the state trading system to the private sector where a mark-up will no longer be collected. For more information on wheat mark-up and tariff reductions, see JA7153.

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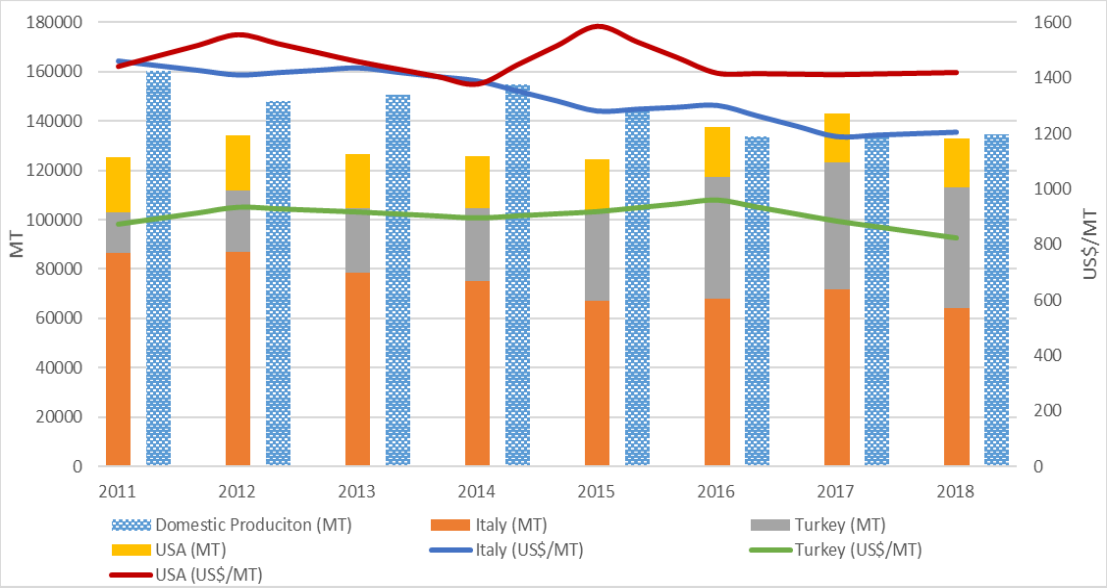
[11] Wheat products in this report are defined to include wheat flour (HS1101), uncooked pasta (HS190219), other pasta (HS190230), and couscous (HS190240).

[12] To facilitate wheat product exports, Japan allows wheat to be imported duty free when it is processed in Japan into wheat products for export.

As a state importer, MAFF sets the sales price for the five major classes of food wheat[13] and revises them twice a year (April-September and October-March) to reflect changes in international prices. From April to September 2019, MAFF will reduce the average sales price of the five major wheat classes by 1.7 percent to 54,630 yen/MT due to a decrease in freight costs and the reduction to the mark-up applied to Canadian and Australian wheat.

For wheat products, pasta (uncooked spaghetti and macaroni) accounted for over 90 percent of Japanese imports in MY 2017/18, totaling 143,393 MT. Italy accounted for 47 percent of Japan's past imports, followed by Turkey[14] at 34.7 percent, and then the United States at 14 percent. Recently, Turkey has increased its market share at the expense of Italy due to its price competitiveness. However, Italy's price competitiveness will improve as the current duty of 30 yen/kg will be phased out to eventually reach zero in Year 11 of the Japan-EU EPA. Japan produces approximately 135,000 MT of spaghetti and macaroni annually (consuming roughly 200,000 MT of imported durum wheat in the production process). In order to protect Japanese pasta manufacturers from foreign competition, however, the GOJ will substantially reduce the mark-up on state-traded durum wheat imports from all suppliers (including the United States). Furthermore, to mitigate the impact of the Japan-EU EPA, the GOJ will extend tax reductions to pasta, confectionary manufacturers (chocolate, candies, biscuits, etc) and "sugar producers" beginning in JFY2019[15].

Chart 6. Japanese Production, Imports and CIF Prices of Spaghetti and Macaroni



Source: Global Trade Atlas, Japan Pasta Association

[13] U.S. Western White (WW), U.S. Hard Red Winter (HRW), U.S. Dark Northern Spring (DNS), Canada Western Red Spring #1 (1CW) and Australia Standard White (ASW)

[14] Turkey and Japan are currently negotiating a bilateral Free Trade Agreement. See, e.g., https://www.mofa.go.jp/policy/economy/fta/index.html

[15] The Temporary Measures Law to Improve Management of Specific Agricultural Processing Industry will be revised to add pasta, sugar and confectionary manufacturers to the list of industries subject to support measures: 1) low interest loans by government affiliated financial institutions, 2) special depreciation (30%), and 3) reduction of the business facility tax which is levied according to the number of employees and the size of the facility.

While the total volume of Japanese wheat and wheat product imports is not expected to increase, the recently concluded trade agreements may influence both the countries that supply wheat and wheat products to Japan and the specific preparations that they supply.

Stocks

With the GOJ continuing to extend financial support to flour mills for storage costs for food wheat (i.e., for 1.8 months of the 2.3 months of stocks that flour mills hold for contingency purposes), ending stocks are forecast to remain at 1.2 MMT in MY2018/19 and MY2019/20.

Additional Data

Table 1. Japanese Compound and Mixed Feed Production

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%	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%	100.0%
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	990482	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%

Source: MAFF

Table 2. Japanese Corn Imports (Quantity)

	Quantity (MT)					Share %				
	MY2015/16	MY2016/17	MY2017/18	October 2017 - January 2018	October 2018 - January 2019	MY2015/16	MY2016/17	MY2017/18	October 2017 - January 2018	October 2018 - January 2019
United States	10,585,567	13,487,059	12,071,466	2,268,590	5,180,612	69.63	88.92	77.06	42.50	95.72
Brazil	4,483,494	929,730	2,840,339	2,591,101	60,267	29.49	6.13	18.13	48.54	1.11
South Africa	92	180,062	644,176	439,663	90,267	0.00	1.19	4.11	8.24	1.67
Russia	13,142	309,911	71,761	11,453	36,047	0.09	2.04	0.46	0.21	0.67
Argentina	75,633	15,821	27,874	23,382	40,061	0.50	0.10	0.18	0.44	0.74
Ukraine	35,142	215,163	-	-	-	0.23	1.42	0.00	0.00	0.00
All others	9,306	29,702	10,249	3,810	5,211	0.06	0.20	0.07	0.07	0.10
Total	15,202,376	15,167,448	15,665,865	5,337,999	5,412,465	100.00	100.00	100.00	100.00	100.00

Source: Global Trade Atlas

Table 3. Japanese Corn Imports (Value)

	Value (US$)					Share %				
	MY2015/16	MY2016/17	MY2017/18	October 2017 - January 2018	October 2018 - January 2019	MY2015/16	MY2016/17	MY2017/18	October 2017 - January 2018	October 2018 - January 2019
United States	2,163,139,200	2,783,381,773	2,396,959,800	459,149,255	1,120,793,806	69.63	91.14	76.74	44.05	95.65
Brazil	886,461,843	154,407,945	558,441,429	491,888,232	12,504,215	28.53	5.06	17.88	47.19	1.07
South Africa	69,257	105,426	144,229,526	82,511,914	19,381,645	0.00	0.00	4.62	7.92	1.65
Russia	2,361,771	60,413,797	12,832,975	2,160,331	7,424,608	0.08	1.98	0.41	0.21	0.63
Argentina	21,049,453	3,218,068	5,418,921	4,496,184	8,916,916	0.68	0.11	0.17	0.43	0.76
Ukraine	29037618	42131010	0	-	-	0.93	1.38	0.00	0	0
All others	4,716,291	10,154,670	5,800,132	2,147,836	2,686,935	0.15	0.33	0.19	0.21	0.23
Total	3,106,835,433	3,053,812,689	3,123,682,783	1,042,353,752	1,171,708,125	100.00	100.00	100.00	100.00	100.00

Source: Global Trade Atlas

Table 4. Japanese Sorghum Imports

	Quantity (MT)				Value (US$)			
	MY2015/16	MY2016/17	MY2017/18	October 2018 - January 2019	MY2015/16	MY2016/17	MY2017/18	October 2018 - January 2019
Argentina	575,287	333,714	337,480	42,208	112,097,184	64,855,973	64,911,012	8,858,840
United States	71,793	218,911	252,925	115,166	16,326,721	45,111,652	52,748,592	26,958,359
India	1,276	873	1,286	597	359,673	269,603	399,338	184,060
Australia	741	7,037	368	41	253,199	1,594,911	140,478	19,273
Al others	421	470	420	114	134,094	156,006	160,091	42,272
Total	649,518	561,005	592,479	158,126	129,170,871	111,988,145	118,359,511	36,062,804
U.S. share	11.1%	39.0%	42.7%	72.8%	12.6%	40.3%	44.6%	74.8%

Source: Global Trade Atlas

Table 5. Japanese Food Barley Imports

	Quantity (MT)				Value (US$)			
	MY2015/16	MY2016/17	MY2017/18	October 2018 January 2019	MY2015/16	MY2016/17	MY2017/18	October 2018 - January 2019
Australia	174,900	159,562	183,888	41,512	56,912,819	45,530,523	59,541,306	13,828,577
Canada	47,656	60,403	78,136	10,004	17,329,132	18,577,613	25,889,203	3,333,797
United States	6,378	24,032	27,920	11,537	3,355,939	11,600,737	16,133,171	6,727,862
All others	2,027	2,137	2,084	2	831,191	1,020,245	977,241	5,899
Total	230,961	246,134	292,028	63,055	78,429,081	76,729,118	102,540,921	23,896,135
U.S. Share	2.8%	9.8%	9.6%	18.3%	4.3%	15.1%	15.7%	28.2%

Source: Global Trade Atlas

Table 6. Japanese Feed Barley Imports

	Quantity (MT)				Value (US$)			
	MY2015/16	MY2016/17	MY2017/18	October 2018 - January 2019	MY2015/16	MY2016/17	MY2017/18	October 2018 - January 2019
Australia	566,195	917,666	797,920	126,577	113,169,107	178,338,416	195,294,986	35,279,123
Ukraine	186,049	10,233	87,389	67,011	39,564,969	1,876,835	20,828,805	16,264,566
Canada	23,531	-	50,579	119,445	4,422,754	-	11,897,799	30,781,965
Romania	37,753	1,159	19,130	-	8,173,312	244,575	4,115,521	-
Russia	40,820	16,558	4,592	16,061	9,053,844	2,892,849	958,926	3,726,325
All others	69,632	4,303	1,048	-	14,823,950	908,021	222,602	-
Total	923,980	949,919	960,658	329,094	189,207,936	184,260,696	233,318,639	86,051,979

Source: Global Trade Atlas

Table 7. Japanese Rice Planted Area (1,000 ha)

	Table rice	Rice for processing	Rice for feed	Rice for the GOJ reserves	Rice for flour	Rice for New Market Development eg. exports	Rice for other	Total
MY2014/15	1,474	49	34	45	3	1	3	1,609
MY2015/16	1,406	47	80	45	4	2	2	1,586
MY2016/17	1,381	51	91	40	3	1	3	1,570
MY2017/18	1,370	52	92	35	5	1	3	1,558
MY2018/19	1,386	51	80	22	5	4	2	1,550

Source: MAFF

Table 8. Support Payment to Facilitate Production Conversion from Table Rice
(Paid on a per 0.1 ha basis)

	Rice for feed and flour	Rice for new market development[1.] E.g., exports	Rice for processing	Rice for whole crop silage
Direct Payment for Strategic Crops	55,000 – 105,000 yen based on the yield		20,000 yen	80,000 yen
Direct Payment for the Creation of Production Regions	12,000 yen when planting high yield varieties	20,000 yen only for the primary crops[2.]		
-Additional payment for expansion of conversion crops [Began April 1, 2018 (JFY2018)]	10,000 yen Paid to Prefectures whose planted areas of other crops increased while the planted areas of table rice was reduced from table rice planted areas of JFY2017 or JFY 2018, whichever was smaller			
-JFY2019 emergency additional payment for expansion of conversion crops [Available only in JFY2019: April 1, 2019 – March 31, 2020]	5,000 yen Paid to Prefectures whose planted area of other crops increased while the planted area of table rice decreased from JFY2018			
-Additional payment for expansion of high profit earning crops[3.] [New program started in April 1, 2019 (JFY2019)]		20,000 yen Paid to prefectures whose planted areas of high profit earning crops increased from the previous year while the planted area of table rice decreased from JFY2018		
Total maximum payment	82,000 – 132,000 yen	55,000 yen	55,000 yen	95,000 yen

Source: MAFF

1. Paid to Prefectures when rice planted and intended for developing a new market in Japan or overseas.
2. Primary crops are the crop that a farmer produces during optimal growing conditions, and a farmer can only receive this support payment once per year.
3. High profit earning crops are defined as horticultural produce, rice for new market development, rice for processing, feed corn.

In addition to the above payment, 105,000 yen per 0.1 ha is paid to prefectures when rice paddies have been converted to dry field (only paid in the first year).

Table 9. Japanese Market Access Rice Tender Results (As of March 15, 2019)

		JFY2012	JFY2013	JFY2014	JFY2015	JFY2016	JFY2017	JFY2018
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	248,000
	Total	321,974	320,046	319,804	319,909	334,438	324,783	281,936
	Share	47.4%	47.1%	47.2%	47.2%	49.3%	47.8%	46.6%
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	238,704
	Total	250,434	312,106	295,770	305,734	333,558	234,814	246,318
	Share	36.9%	45.9%	43.6%	45.1%	49.2%	34.6%	40.7%
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%	2.2%
	CSQ							1,120
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%	10.1%
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	546,704
	Total	679,564	679,772	677,780	677,773	678,589	678,846	605,248
	CSQ							1,120

Source: MAFF

Table 10. Japanese Food Wheat Imports (Quantity)

	Quantity (MT)					Share %				
	MY2015/16	MY2016/17	MY2017/18	July 2017 - January 2018	July 2018 - January 2019	MY2015/16	MY2016/17	MY2017/18	July 2017 - January 2018	July 2018 - January 2019
United States	2,490,573	2,744,617	2,698,207	1,567,497	1,476,305	48.67	52.00	51.53	51.86	50.61
Canada	1,743,326	1,645,622	1,653,507	936,178	925,003	34.07	31.18	31.58	30.97	31.71
Australia	876,088	880,910	878,151	514,307	510,261	17.12	16.69	16.77	17.01	17.49
France	6,738	7,253	6,486	4,675	5,480	0.13	0.14	0.12	0.15	0.19
All others	148	155	68	44	67	0.00	0.00	0.00	0.00	0.00
Total	5,116,873	5,278,557	5,236,419	3,022,701	2,917,116	100.00	100.00	100.00	100.00	100.00

Source: Global Trade Atlas

Table 11. Japanese Food Wheat Imports (Value)

	Value (US$)					Share %				
	MY2015/16	MY2016/17	MY2017/18	July 2017 - January 2018	July 2018 - January 2019	MY2015/16	MY2016/17	MY2017/18	July 2017 - January 2018	July 2018 - January 2019
United States	661,216,126	661,575,483	719,706,964	411,333,547	421,796,941	48.18	48.42	48.69	48.80	48.46
Canada	462,641,294	471,833,200	503,506,527	284,733,075	279,763,485	33.71	34.54	34.06	33.78	32.14
Australia	244,621,983	228,755,251	251,204,381	144,185,161	165,635,432	17.83	16.74	16.99	17.11	19.03
France	3,706,557	3,892,822	3,669,785	2,574,045	3,041,032	0.27	0.28	0.25	0.31	0.35
All others	138,466	146,429	86,924	54,529	94,849	0.00	0.00	0.00	0.00	0.00
Total	1,372,324,426	1,366,203,185	1,478,174,581	842,880,357	870,331,739	100.00	100.00	100.00	100.00	100.00

Table 12. Japanese Feed Wheat Imports

	Quantity (MT)				Value (US$)			
	MY2015/16	MY2016/17	MY2017/18	October 2018 - January 2019	MY2015/16	MY2016/17	MY2017/18	October 2018 - January 2019
United States	13,585	84,567	210,082	134,671	3,102,886	18,283,479	48,367,962	36,106,084
Australia	21	64,550	60,026	6,345	7,659	14,207,229	13,725,038	1,703,660
Russia	9,662	47,993	53,396	13,916	2,118,507	9,029,398	11,532,440	3,330,917
Ukraine	156,177	54,101	31,680	68,640	33,996,205	10,391,985	6,770,416	16,169,495
Romania	7,994	56,918	14,098	-	1,779,104	11,433,091	3,243,736	-
All others	170,747	63,444	12,446	-	36,703,571	13,003,774	3,032,333	-
Total	358,186	371,573	381,728	223,572	77,707,932	76,348,956	86,671,925	57,310,157
U.S. share	3.8%	22.8%	55.0%	60.2%	4.0%	23.9%	55.8%	63.0%

Source: Global Trade Atlas

Table 13. Japanese Wheat Product Imports

	Quantity (MT)				Value (US$)			
	MY2015/16	MY2016/17	MY2017/18	July 2018 - January 2019	MY2015/16	MY2016/17	MY2017/18	July 2018 - January 2019
Italy	71,157	75,707	71,512	39,640	92,428,110	94,418,956	88,697,397	47,389,437
Turkey	45,516	50,880	49,389	29,566	41,232,707	46,581,550	42,861,840	23,116,396
United States	19,625	20,522	20,671	11,529	30,071,829	29,532,844	29,732,539	16,545,746
China	15,853	16,500	17,017	9,824	49,019,844	49,164,879	50,660,040	28,905,000
Korea South	5,893	6,911	9,528	6,549	17,836,335	22,186,024	30,805,450	22,971,221
All others	20,623	19,554	20,319	11,880	40,781,690	38,965,045	41,121,335	25,481,158
Total	178,667	190,074	188,436	108,988	271,370,515	280,849,298	283,878,601	164,408,958
U.S. share	11.0%	10.8%	11.0%	10.6%	11.1%	10.5%	10.5%	10.1%

Source: Global Trade Atlas