

Japan's Latest Soybean Demand Trends



12 November 2024

MAFF

Ministry of Agriculture,
Forestry and Fisheries

農林水産省

**Food Manufacture Affairs Division,
Minister's Secretariat
New Business and Food Industry Department**

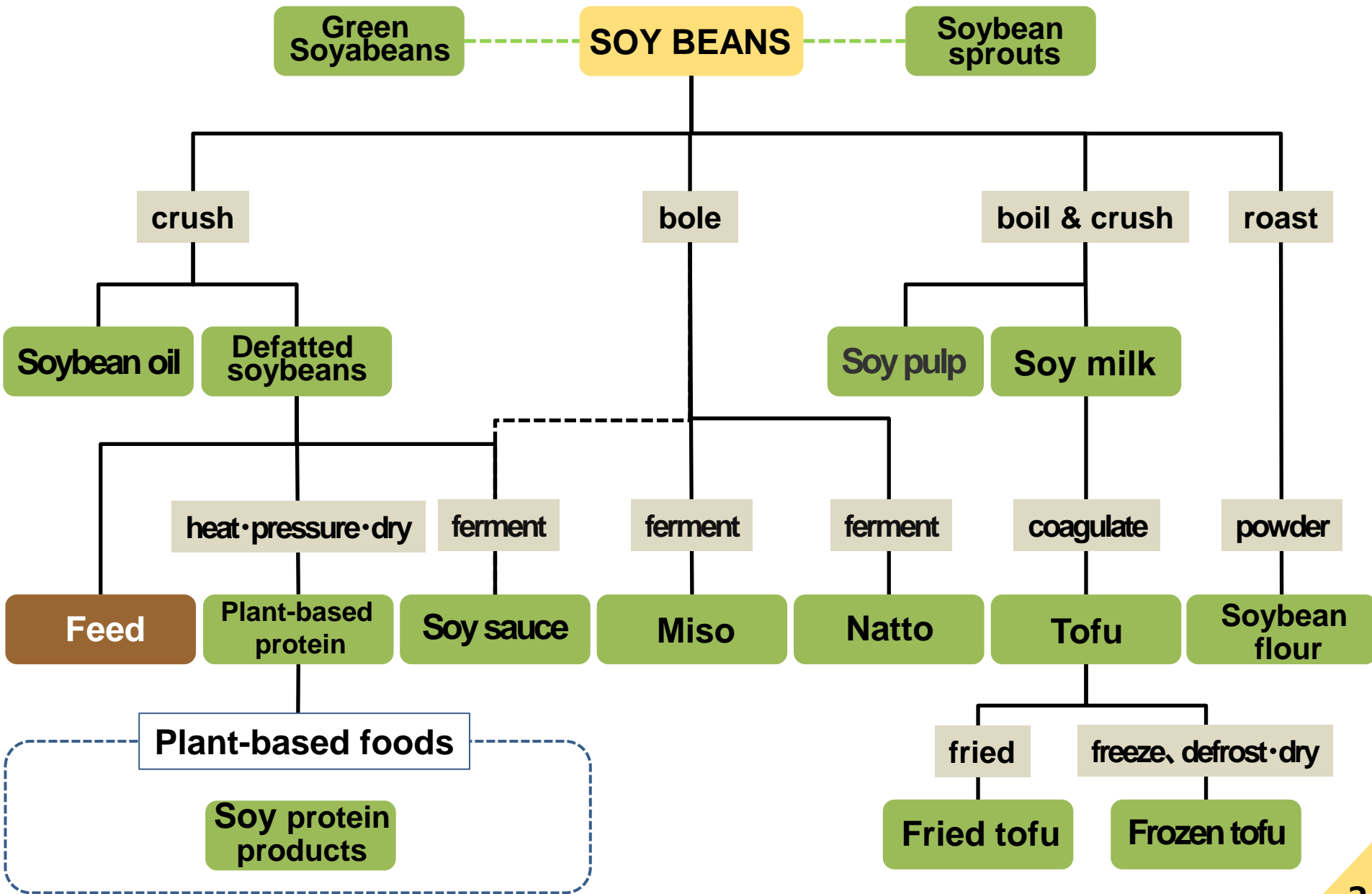
1 Japanese Supply / Demand for Soybean

(unit:1,000MT)

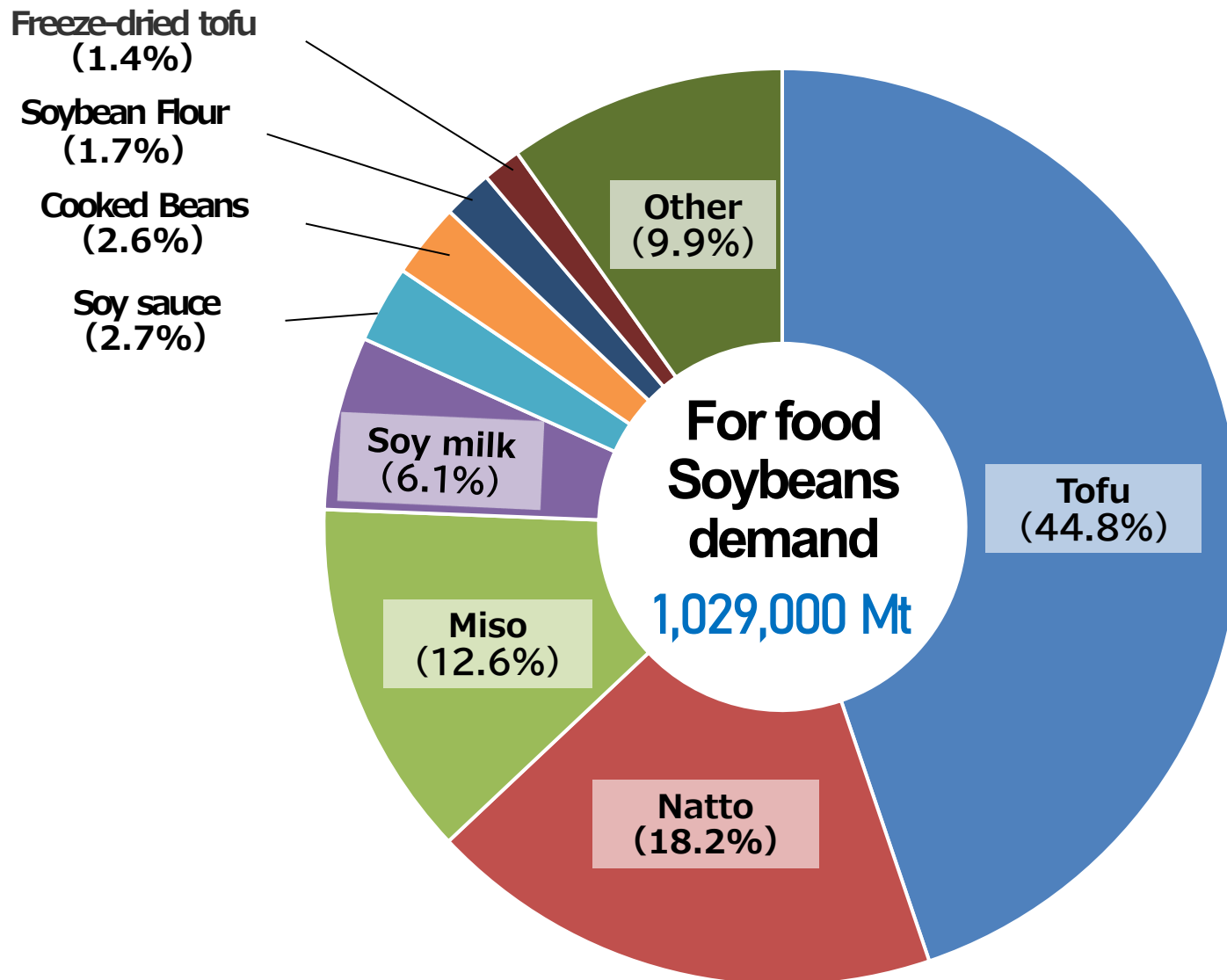
	2020	2021	2022	2023	2024F	2024 ^(a) (Jan/Sep)	
Demand	3,470	3,501	3,787	3,567	3,570	-	-
Crushing	2,324	2,414	2,695	2,453	2,451	1,770	(95.9)
for Food	1,053	998	999	1,029	1,035	-	-
for Feed	85	82	83	77	76	-	-
for Seed	8	8	9	9	8	-	-
Supply	3,381	3,490	3,750	3,398	3,563	-	-
Crop	218	219	247	243	261	-	-
Import	3,163	3,271	3,503	3,156	3,302	2,363	(97.7)
USA	2,376	2,482	2,576	2,168	-	1,575	(96.8)
Brazil	448	495	597	646	-	524	(101.5)
Canada	313	272	309	324	-	249	(95.8)
China	23	19	19	18	-	14	(94.0)
Others	4	2	2	0	-	0	(0.0)
Fluctuations in Stocks	▲ 89	▲ 11	▲ 37	▲ 169	▲ 7	-	-

(a) () : ratios to the same period in the previous year (%)

2 Soybean processing applications



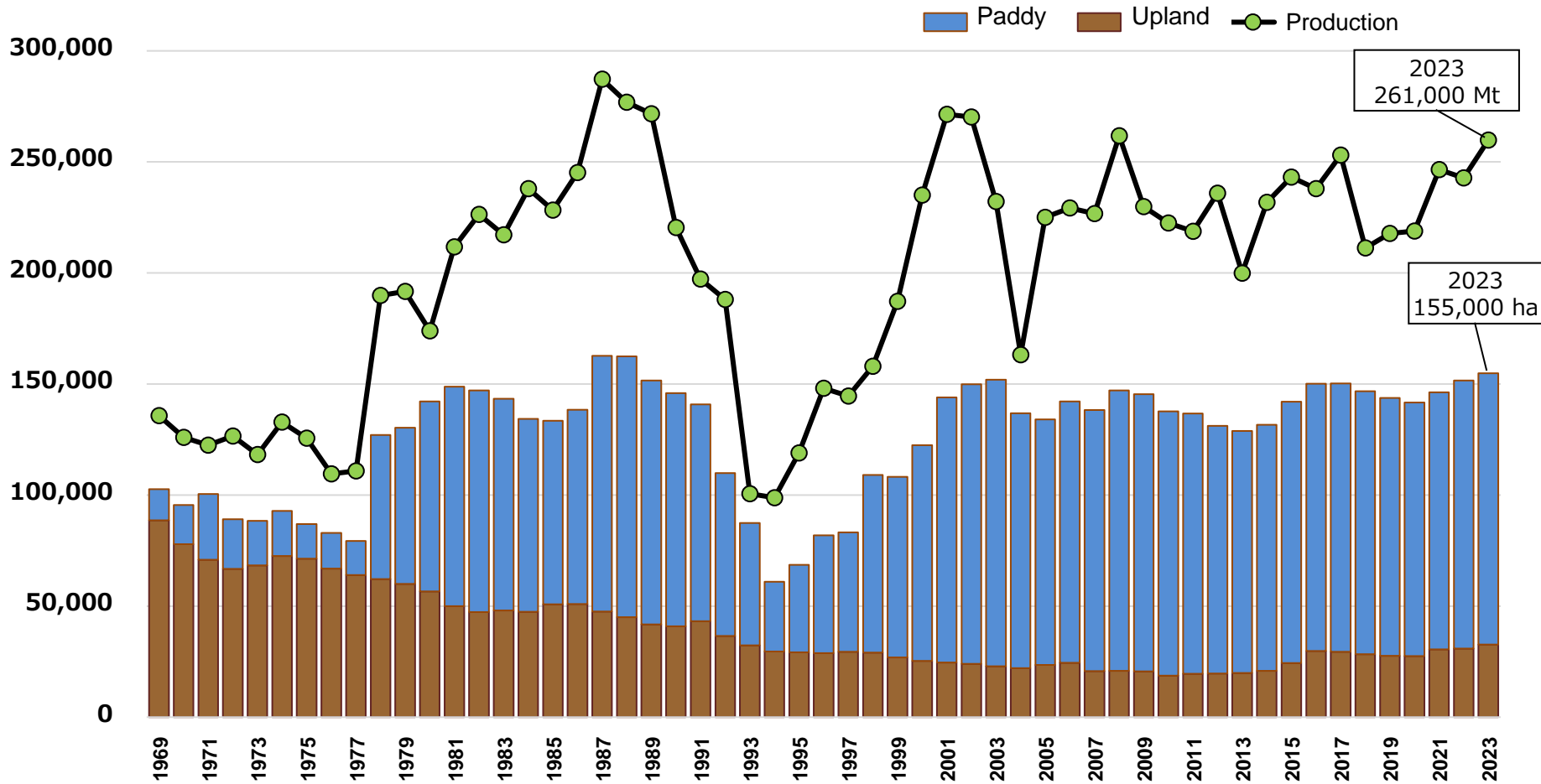
3 Supply Share of Soybean for food (2023)



Based on interviews with food-related organizations, the Food Manufacturing Division made an estimate.

4 Soybean Production and Planted Area in Japan

(ha, Mt)



DATA: Statistics Department Ministry of Agriculture, Forestry and Fisheries Japan "Crop Statics of Japan"

5 Characteristics & quality of soybeans required for food

Tofu

Quality/characteristic required for soybean

- High protein
- Contains a lot of Carbohydrates

Major Varieties in Japan:

/Toyomasari /Fukuyutaka /Satonohohoemi



Cooked Beans

Quality/characteristic required for soybean

- Large-sized soybeans
- Does not let the flavor escape when steamed

Major Varieties in Japan:

/Toyomasari /Hikariguro /Tanbaguro



Natto

Quality/characteristic required for soybean

- Good uniformity, High quality (few cracks)

Major Varieties in Japan:

/Toyomasari /Yukishizuka /Fukuyutaka



Miso

Quality/characteristic required for soybean

- The color tone is good when steamed

Major Varieties in Japan:

/Toyomasari /Fukuyutaka /Ryuhou



■ Commonly sought after soybean quality and sales trends of soybean products

Quality/characteristic required for soybean

- Stable quality and price
- Organic cultivation and other products with added value

Sales Trends

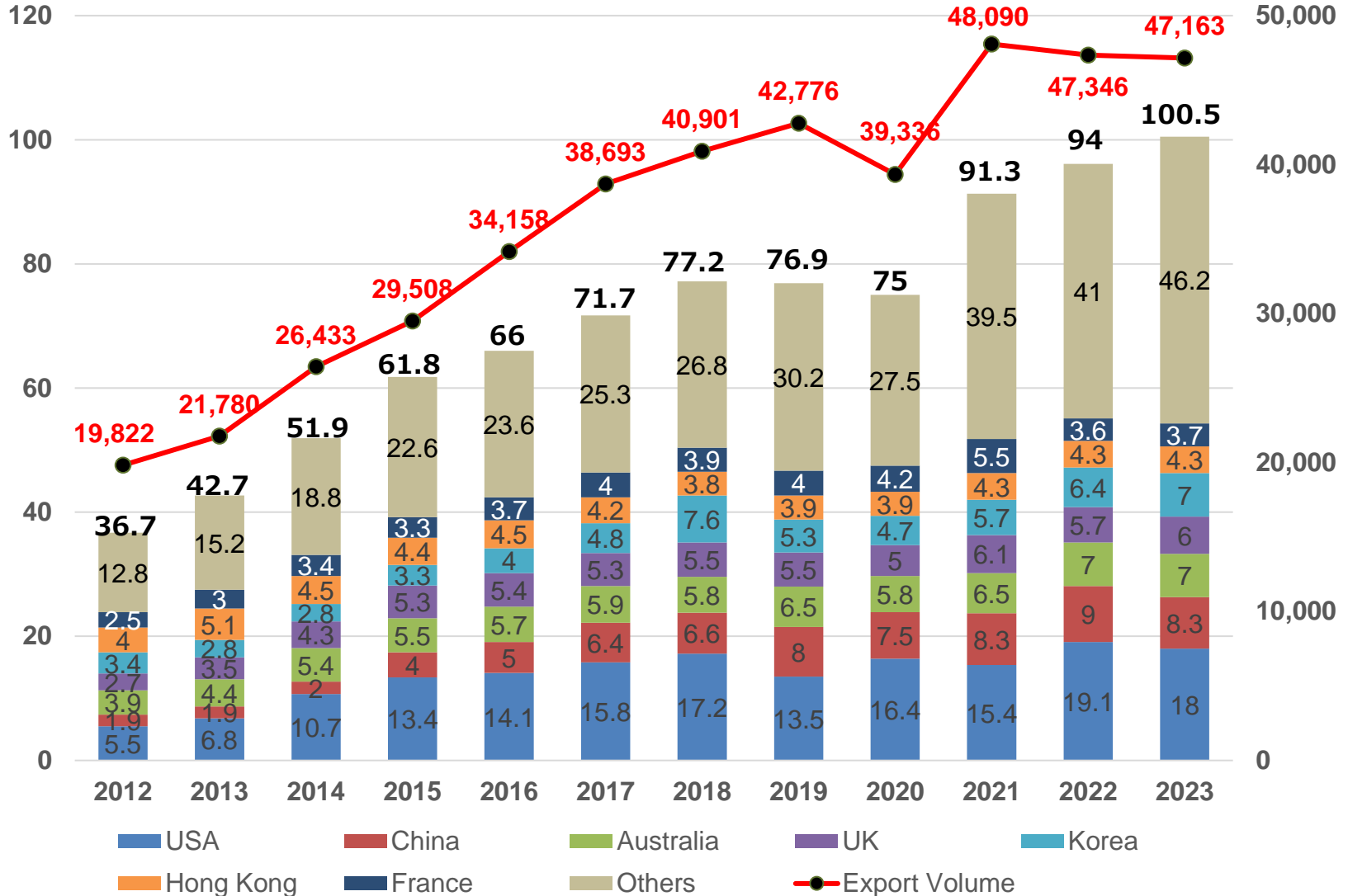
Domestic use is on the rise Growing demand for soy products due to rising health consciousness

Revitalization of towns using local soybean products

6 Export volume and amount of Soy sauce by country

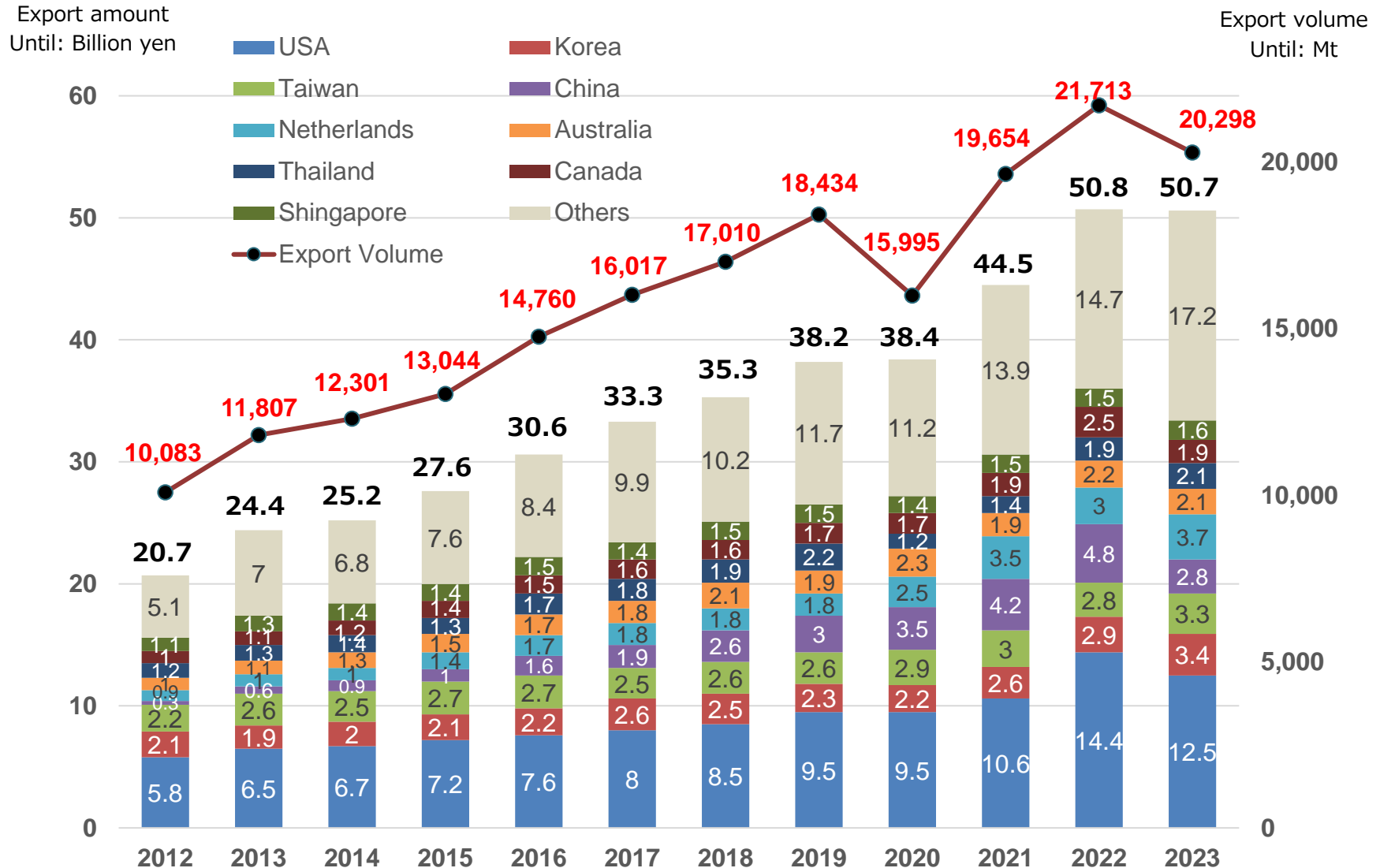
Export amount
Until: Billion yen

Export volume
Until: Mt



DATA: Ministry of Finance Japan "Trade Statistics of Japan"

7 Export volume and amount of Miso by country

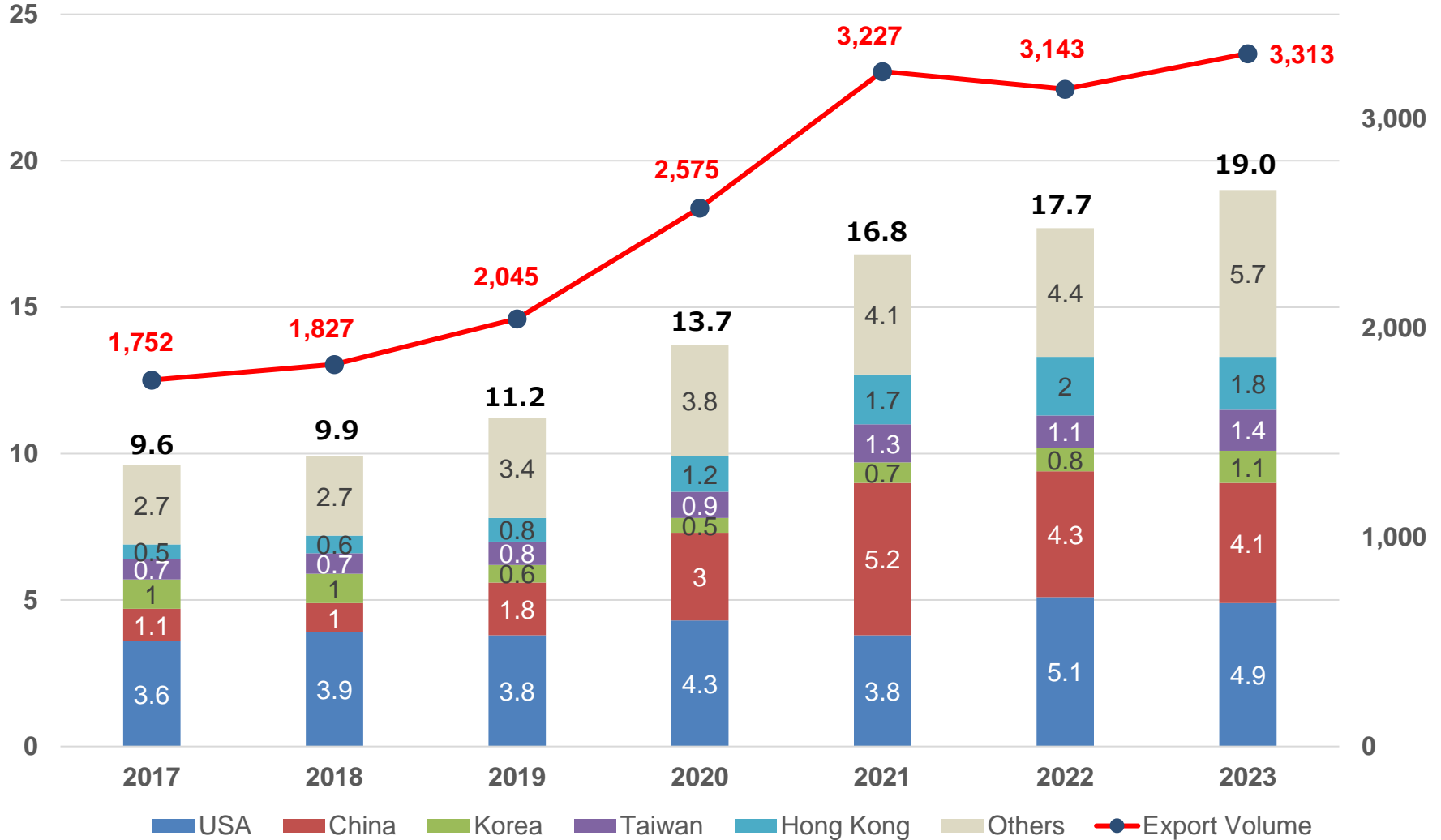


DATA: Ministry of Finance Japan "Trade Statistics of Japan"

8 Export volume and amount of Natto by country

Export amount
Until: Billion yen

Export volume
Until: Mt



DATA: Ministry of Finance Japan "Trade Statistics of Japan"

9 The 51st National Soy Sauce Competition

Purpose : By honoring high-quality soy sauce, we will improve the quality of soy sauce and optimize labeling, provide consumers with high-quality soy sauce, and contribute to the sound development of the industry.

History : since 1973

Division : Koikuchi (Common), Usukuchi (Light color), Tamaru, Saishikomi (Refermented), Shiro (Extra light color)

Awards : Minister's Award
Minister's Secretariat Chief's Award
Award of Excellence

Features : An award ceremony was held to coincide with the "Soy Sauce Day Gathering" event on October 1. The winners of the Minister's Prize were widely introduced by compiling videos of the winners' thoughts and processes on soy sauce production and broadcasting them at the venue.



Judging scene (Tokyo)



Winners: Wearing a blue-purple coat for the Minister's Award and red-purple for the Chief Cabinet Secretary's Award

Minister of Agriculture, Forestry and Fisheries Award



(株)木村醤油店
(山形)
味の司

(資)山形屋商店
(福島)
ヤマブン本醸造
特選醤油

イチビキ(株)第三工場
(愛知)
食品添加物無添加
国産しょうゆ

(資)西村商店
(三重)
スーパーミエマン

ヤマシン醸造(株)
(愛知)
ヤマシン



10 The 64st National MISO Competition

Sponsored by

Central MISO
Research Institute

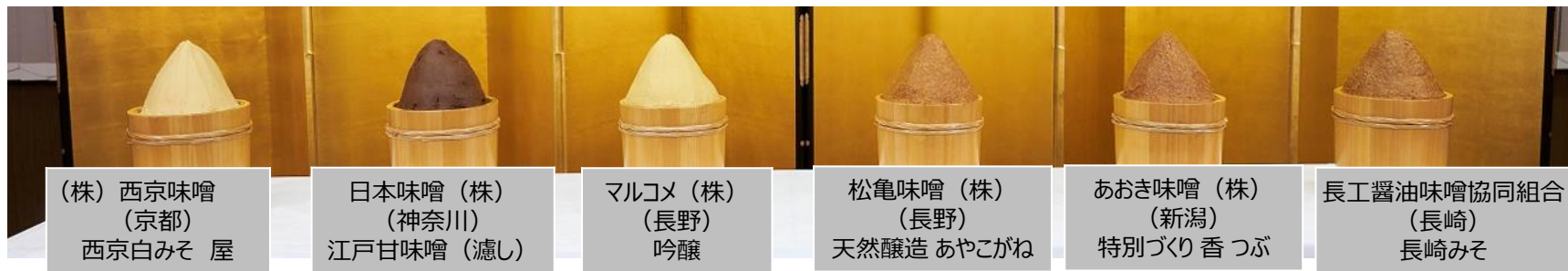
Purpose : With the aim of improving the quality of miso and improving technology, we will deepen consumer awareness and contribute to the improvement of dietary habits and the sound development of miso brewing technology.

Awards : Minister's Award
Minister's Secretariat Chief's Award
Japan Federation of Miso Manufacturers Cooperatives President's Award
Central MISO Research Institute President's Award
National MISO Appraisal Judges' Prize

History : since 1955

The 64st (2023.11.16 Award Ceremony)

■ Minister of Agriculture, Forestry and Fisheries Award



■ Minister's Secretariat Chief's Award (15)

むらた蔵 蔵の技 白みそ： 村田味噌(株) (大阪)	雪国の味： 丸久味噌(株) (新潟)	味わい最上： (株)星野本店 (新潟)
くらしき塩屋の甘口： (株)くらしき塩屋 (岡山)	雪の花みそ 華香： (株)杉田味噌醸造場 (新潟)	赤だし： マルサンアイ(株) (愛知)
金紋 江戸味噌： (株)日出味噌醸造元 (東京)	紅一点石狩 こし： 岩田醸造(株) (北海道)	フジジン夜明け麦白みそ： 二豊味噌協業組合 (大分)
さらしな味噌： (合) 高村商店 (長野)	特別仕込 御天領： (株)丸世醸造場 (長野)	米・麦合せ味噌： 高見味噌店 (岡山)
米こうじ： ひかり味噌(株) (長野)	匠の味 赤みそ： (株)越後一 (新潟)	フドーキン 生詰 あわせ： 大分みそ協業組合 (大分)



https://www.miso.jp/chumiken_kanpyokai.html

Judging scene (Tokyo)

11 The 8th National Tofu Competition

Purpose : With the aim of further improving the manufacturing technology and quality of Japan's tofu, it aims to serve as a place for tofu manufacturers to study, and to contribute to the promotion and development of the tofu industry and the promotion of the health of the people.

History : since 2016

Division : momen, kinugoshi, yose/oboro, Filling

Awards : Minister's Award
Minister's Secretariat Chief's Award
etc

Features : Award ceremony held in conjunction with the "Nppon Tofuya Summit" (This year : in Okinawa)

The 8th (2024.11.9 Award Ceremony)

■ Minister of Agriculture, Forestry and Fisheries Award



「特選寄せ豆腐」
(株) とうふ工房ゆう (Tokyo)



Judging scene (Tokyo)

■ U.S. Soybean Sustainability

Ambassador Award



「きぬこし (絹筒豆腐)」
Yuuki Food Co.,Ltd (pref.Kochi)

<https://tofuaward.jp/>

12 The 27st National Natto Competition

Purpose : With the aim of improving natto manufacturing technology and improving quality, we aim to provide hygienic and delicious natto and contribute to the health promotion of the people.

History : since 1955

Division : Small・Very small grains, large・Medium grains、
Hkiwari、U.S.Soybean

Awards : Minister's Award

Minister's Secretariat Chief of Staff Award

The 27st (2023.11.9 Judging Committee)

■ Minister of Agriculture, Forestry and Fisheries

Award



「大粒白糸納豆」

SUZUKI FOODS INDUSTRY CO.,LTD (pref.Mie)

- SSGA US Award
- US Soybean Sustainability Ambassador Award



「おちびさん つゆだく納豆」

KOSUGI FOODS CO.,LTD (pref. Mie)



Judging scene (Nagano)

<https://www.natto.or.jp/kanpyou/index.html>



Thank you

