

# **Soybean supply and demand trends in Japan**



**11 November 2025**



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

# 1 Japanese Supply / Demand for Soybean

(unit:1,000MT)

|                                    | 2021  | 2022  | 2023  | 2024  | 2025F(a) | 2025 <sup>(b)</sup><br>(Jan/Sep) |
|------------------------------------|-------|-------|-------|-------|----------|----------------------------------|
| <b>Demand</b>                      | 3,493 | 3,778 | 3,558 | 3,496 | 3,563    | -                                |
| Crushing                           | 2,414 | 2,695 | 2,453 | 2,376 | 2,414    | 1,905 (107.7)                    |
| for Food                           | 998   | 999   | 1,029 | 1,045 | 1,076    | - -                              |
| for Feed                           | 82    | 83    | 77    | 75    | 73       | - -                              |
| Export                             | 0     | 0     | 0     | 0     | 0        | 0 (201.0)                        |
| <b>Supply</b>                      | 3,425 | 3,680 | 3,335 | 3,369 | 3,564    | - -                              |
| Crop                               | 219   | 247   | 243   | 261   | 252      | - -                              |
| Import                             | 3,271 | 3,503 | 3,156 | 3,171 | 3,380    | 2,434 (103.0)                    |
| USA                                | 2,482 | 2,576 | 2,168 | 2,084 | -        | 1,630 (103.5)                    |
| Brazil                             | 495   | 597   | 646   | 741   | -        | 521 (99.4)                       |
| Canada                             | 272   | 309   | 324   | 330   | -        | 269 (107.6)                      |
| China                              | 19    | 19    | 18    | 17    | -        | 15 (106.6)                       |
| Others                             | 2     | 2     | 0     | 0     | -        | 0 (108.3)                        |
| Loss                               | ▲ 65  | ▲ 70  | ▲ 63  | ▲ 63  | ▲ 68     | - -                              |
| <b>Ending Stocks<sup>(c)</sup></b> | 212   | 226   | 138   | 195   | -        | - -                              |

(a) forecast as of July 2025

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

(c) ending stocks of oil companies only(reference data)

## 2 Japanese Supply / Demand for Soya Meal



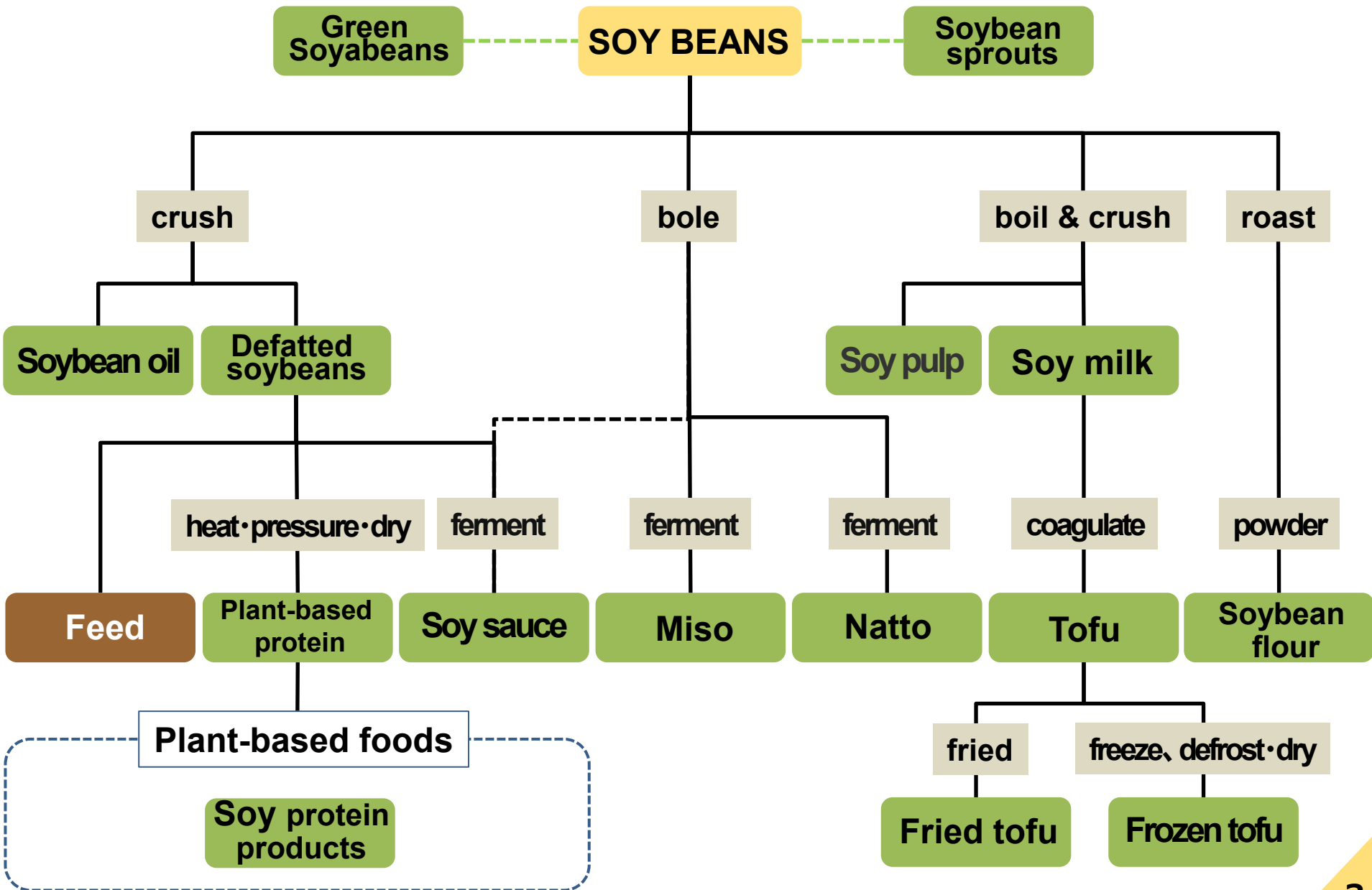
(unit:1,000MT)

|                      | 2021  | 2022  | 2023  | 2024  | 2025F(a) | 2025 <sup>(b)</sup><br>(Jan/Sep) |
|----------------------|-------|-------|-------|-------|----------|----------------------------------|
| <b>Demand</b>        | 3,555 | 3,525 | 3,512 | 3,399 | 3,397    | - -                              |
| for Feed             | 3,092 | 3,097 | 3,077 | 3,048 | 3,048    | - -                              |
| for Others           | 462   | 427   | 435   | 350   | 349      | - -                              |
| Export               | 1     | 0     | 0     | 1     | 0        | 0 (91.1)                         |
| <b>Supply</b>        | 3,653 | 3,631 | 3,611 | 3,508 | 3,506    | - -                              |
| Open'g Stocks        | 106   | 99    | 107   | 99    | 109      | - -                              |
| Production           | 1,817 | 2,017 | 1,844 | 1,778 | 1,806    | 1,438 (108.6)                    |
| Import               | 1,730 | 1,516 | 1,660 | 1,631 | 1,591    | 1,225 (95.5)                     |
| <b>Ending Stocks</b> | 99    | 107   | 99    | 109   | 109      | - -                              |

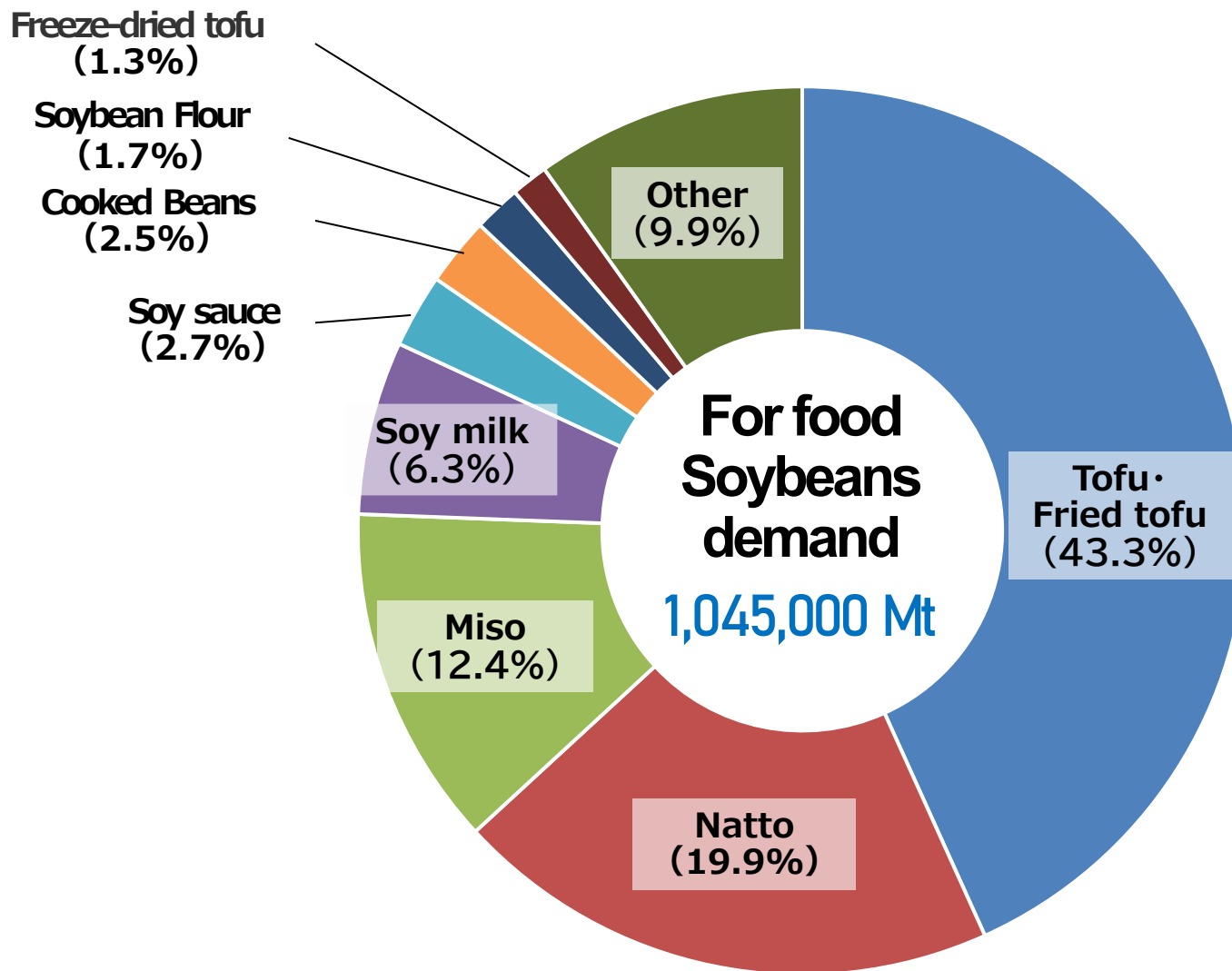
(a) forecast as of July 2025

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

# 3 Soybean processing applications



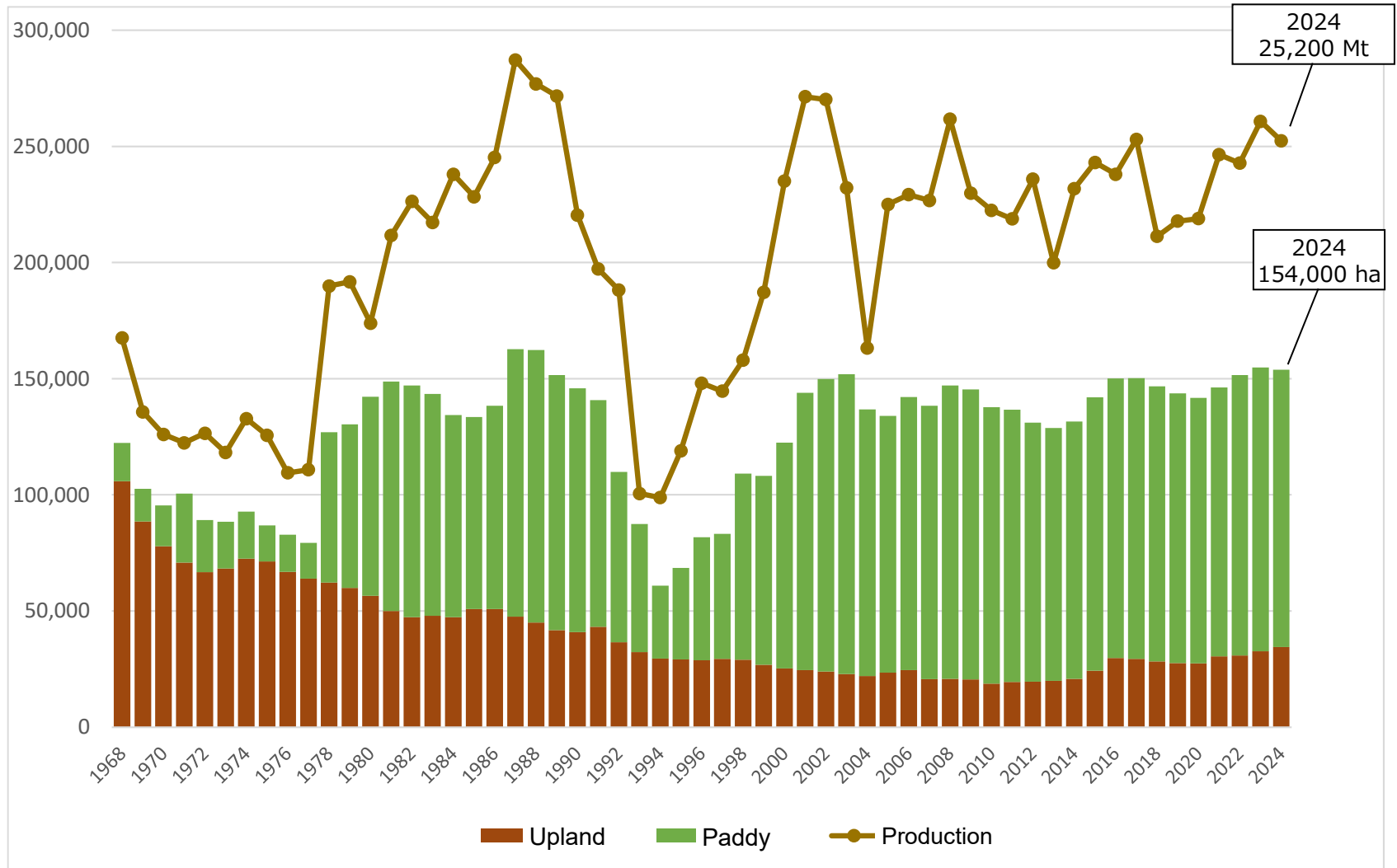
## 4 Supply Share of Soybean for food (2024)



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

# 5 Soybean Production and Planted Area in Japan

(ha, Mt)



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

# 6 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

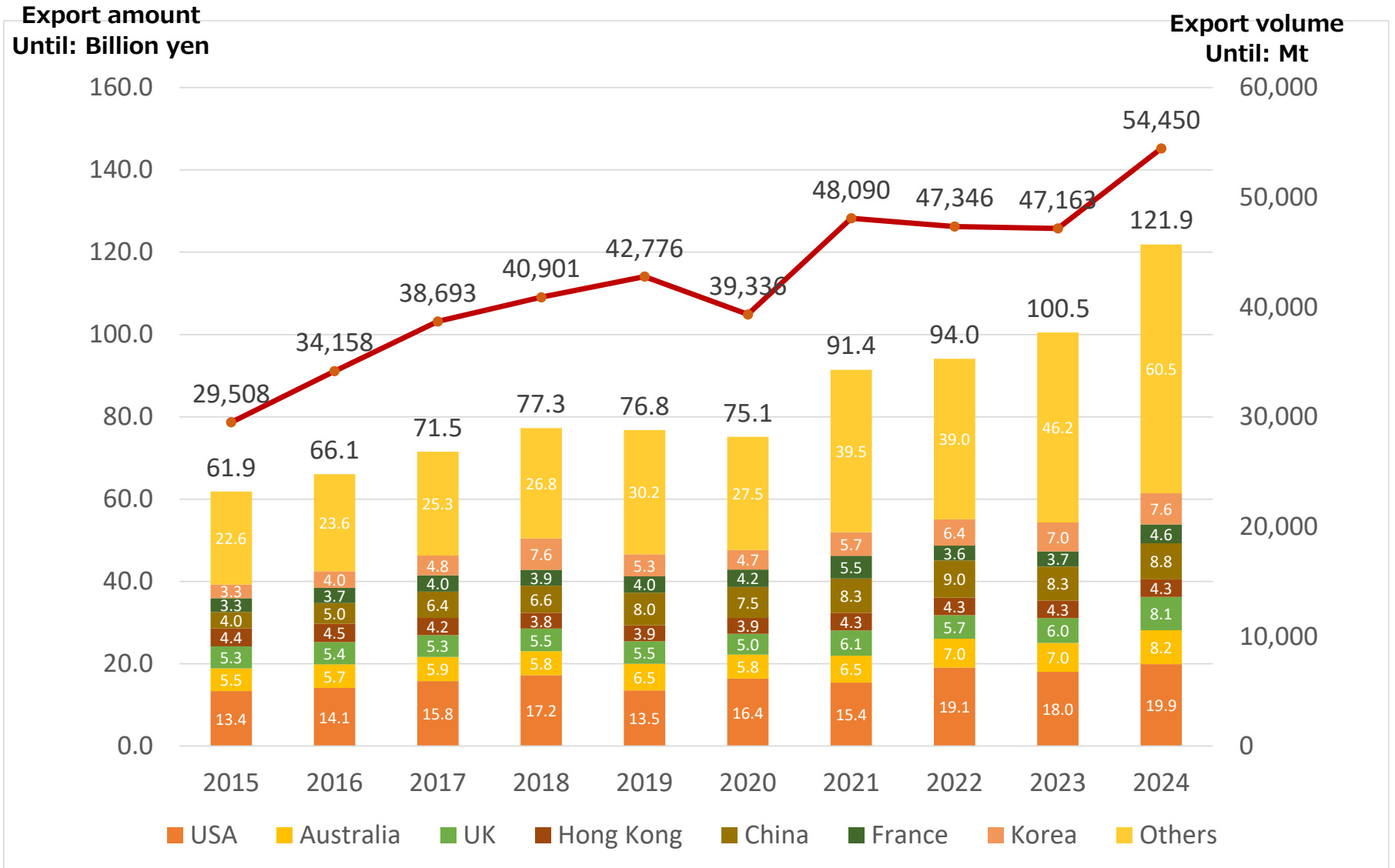
- Stable quality and price
- Organic cultivation and other products with added value

### Sales Trends

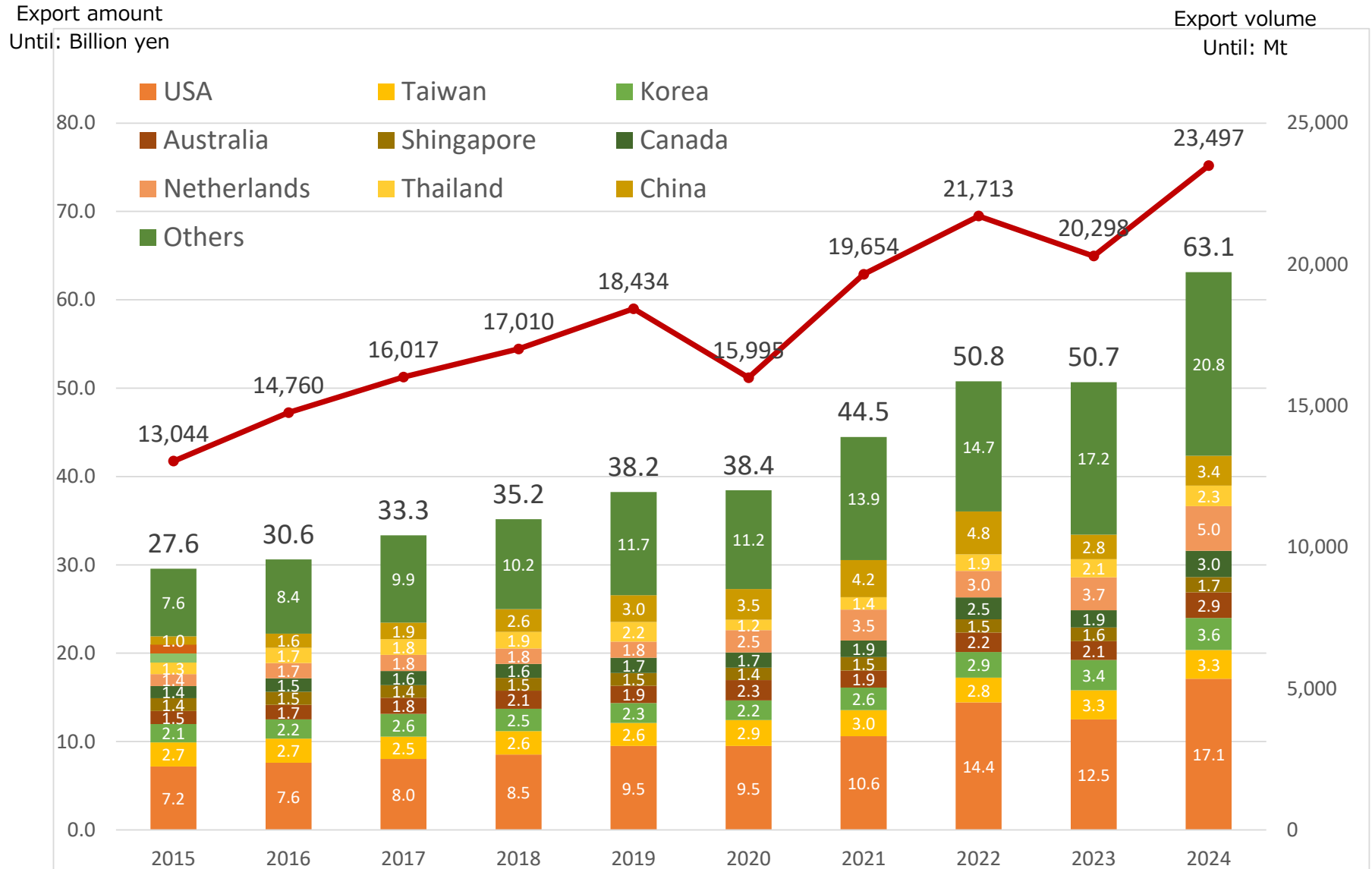
Domestic use is on the rise      Growing demand for soy products due to rising health consciousness

Revitalization of towns using local soybean products

# 7 Export volume and amount of Soy sauce by country

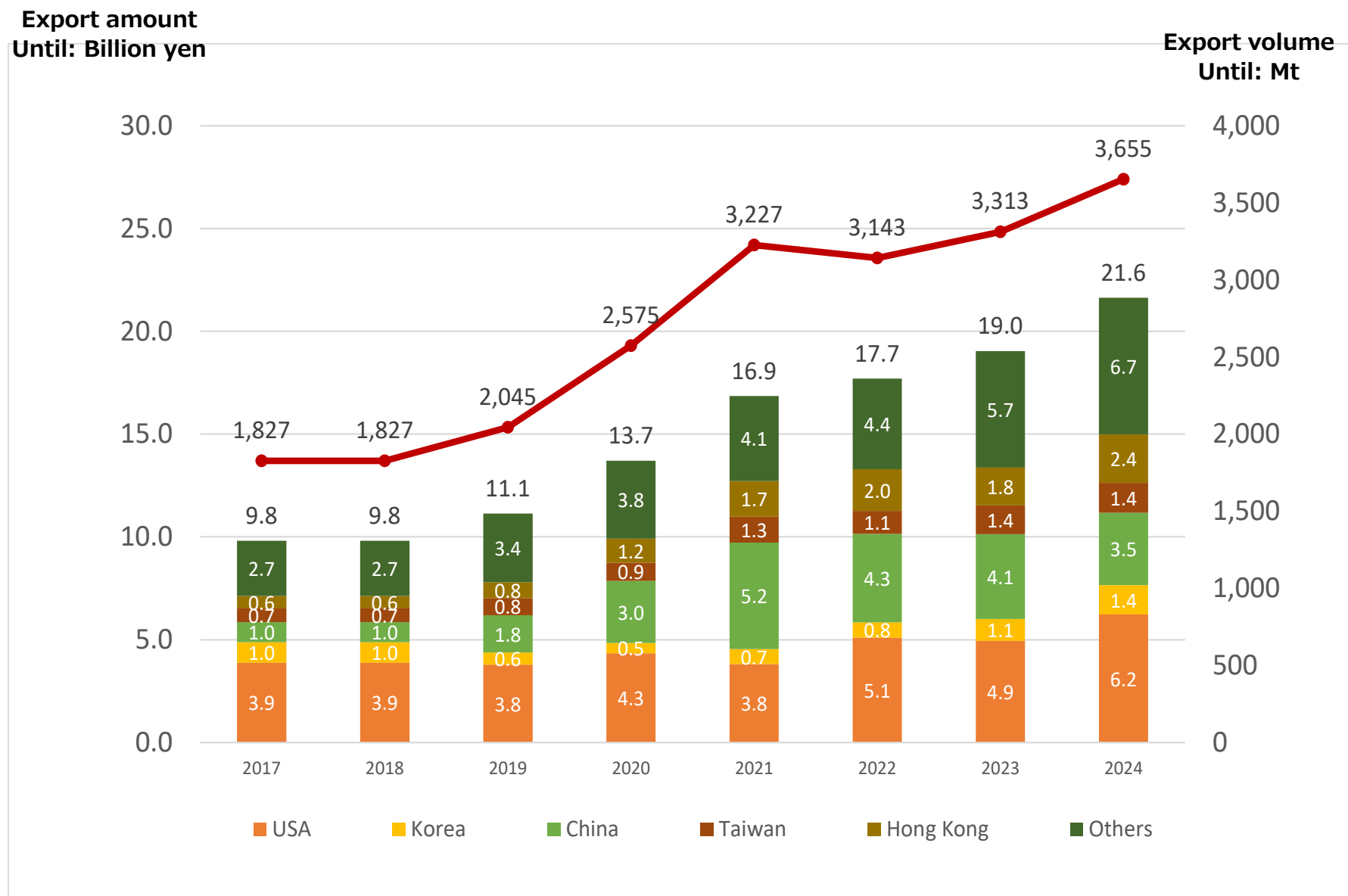


# 8 Export volume and amount of Miso by country



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

# 9 Export volume and amount of Natto by country



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

# 10 The 52<sup>st</sup> 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), Tamari, 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 "SoySauce 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.



<https://www.soyssauce.or.jp/fair>



52nd Award Ceremony October 1, 2025

## Minister of Agriculture, Forestry and Fisheries Award



ヤマカノ醸造(株)  
(宮城)  
純正



(有)今野醸造  
(宮城)  
吟醸



(資) 山形屋商店  
(福島)  
ヤマブン本醸造特選醤油



ちば醤油(株)  
(千葉)  
味特しょうゆ



ヤマシン醸造(株)  
(愛知)  
さしみたまり



# 11 The 65<sup>st</sup> 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

## 65th Awards (Award Ceremony November 21, 2024)

### ■ Minister of Agriculture, Forestry and Fisheries Award



[https://www.miso.jp/chumiken\\_kanpyokai.html](https://www.miso.jp/chumiken_kanpyokai.html)

Judging scene (Tokyo)

# 12 The 9th National Tofu Competition

Sponsored by National Federation  
of Tofu

**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 "Nippon Tofuya Summit" ( This year : in Kagawa)



Judging scene (Tokyo)

## The 9th Award Ceremony November 2, 2025

### ■ Minister of Agriculture, Forestry and Fisheries Award



「特選よせとうふ」  
(株) とうふ工房ゆう (東京都)

### ■ U.S. Soybean Sustainability

#### Ambassador Award



「なめらか絹とうふ」  
三好食品工業株式会社 (福岡県)

<https://tofuaward.jp/>

# 13 The 28<sup>th</sup> 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 、Hikiwari、 U.S.Soybean

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



Judging scene (Osaka)

## 28th Judging Committee (November 22, 2024)

### ■ Minister of Agriculture, Forestry and Fisheries Award



「みのり納豆 ほのか」  
有限会社 ミドリヤ (福島県)

### ■ U.S. Soybean Sustainability Ambassador Award



「からしも旨い納豆」  
株式会社 カジノヤ (東京都)

### ■ SSGA U.S. Award

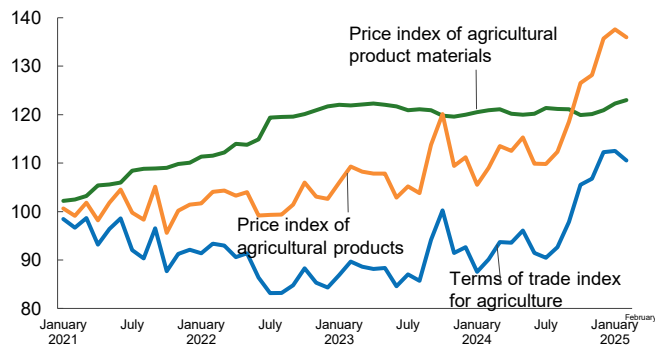


「仙台納豆」  
株式会社 三浦商店 (千葉県)

# 14-1 【topic】 Integrally considering price formation that takes into account reasonable costs and the establishment of sustainable food systems

- The price index of agricultural product materials has been rising since 2021 due to soaring prices of fertilizer, feed, etc. and has leveled off and remained high since 2023.
- On the other hand, the price index of agricultural products, which had been almost leveled off since 2021, has been on an upward trend together with the terms of trade index for agriculture since the latter half of 2024 due to the large increase in the prices of rice and vegetables.
- In order to create a framework for rational price formation, it is important to conduct transactions that take costs into account throughout the food system from production to consumption. In August 2023, the “Council for Fair Price Formation” was established, with members from all levels of the food system, to start discussions.
- In addition, in order to realize a sustainable food supply, it is important not only to facilitate price formation that takes costs into account but also to promote initiatives by food business operators to increase added value. The “Study Group for the Sustainable Development of the Food Industry” was launched in August 2023 to start discussions.
- Based on discussions at said Council and the Study Group, the Ministry of Agriculture, Forestry and Fisheries (MAFF) will examine price formation that takes reasonable costs into account and the establishment of sustainable food systems in an integrated manner.

Price indices of agricultural product materials and agricultural products as well as the terms of trade index for agriculture



Source: MAFF “Statistical Survey on Commodity Prices in Agriculture.”

Notes: 1) Figures for each month/year are based on the average price for 2020 as 100.

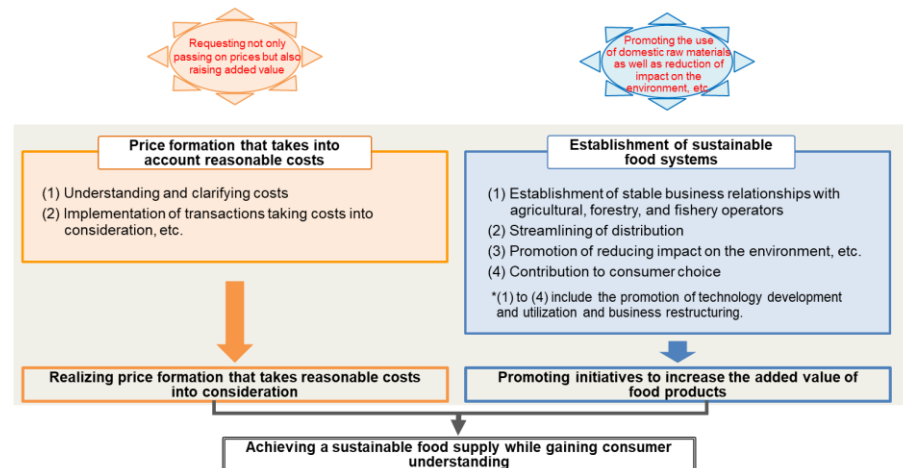
2) Estimates for 2024 and 2025.

3) Terms of trade index for agriculture = Price index of agricultural products / Price index of agricultural product materials × 100

4) The terms of trade index for agriculture are calculated from figures for each month/year based on the average value for 2020 as 100.

## Integrated consideration of price formation that takes into account reasonable costs and establishment of sustainable food systems

- In discussions on price formation that takes reasonable costs into consideration, there are calls for not only simply promoting price pass-through along with cost increases but also **promoting value added** by utilization of domestic raw materials and by **reducing environmental impact** through organic farm products.
- To this end, consideration is also given to **price formation that takes into account reasonable costs and the establishment of sustainable food systems** as an integrated approach.



# 14-2 • The Act on Achieving Sustainable Food Supply (Food Systems Act) has been enacted.

- Initiatives aimed at fostering consumer understanding are promoted.

- The "Act on Rationalizing Distribution and Improving Transactional Propriety for Food and Other Products and the Wholesale Market Act" [provisional translation] was enacted in June 2025.
- While the Act stipulates the role of food business operators in the food system in the provisions of purpose, it specifies the following measures to be taken:

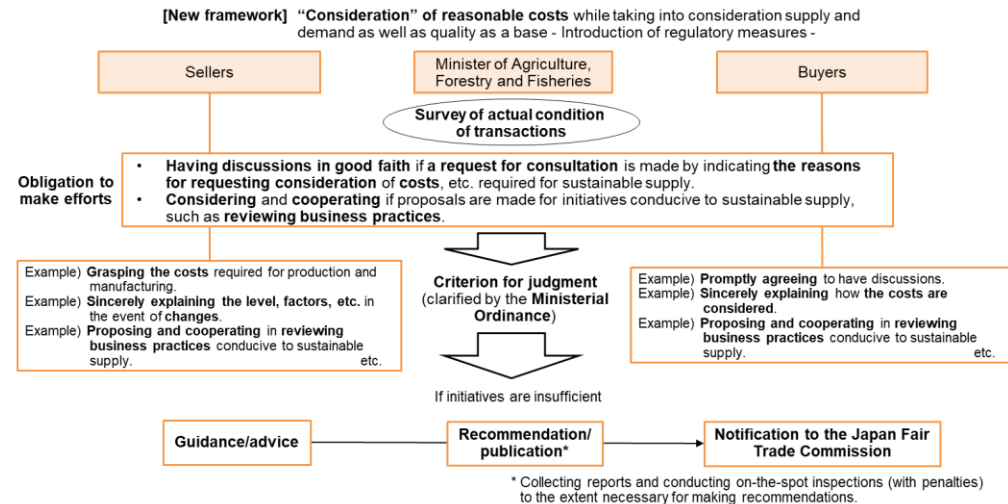
## (1) For the sustainable development of the food industry,

- ✓ Establishing a certification system for food business operators that systematically work for strengthening collaboration between the agriculture, forestry, and fisheries industries and the food industry; and reducing the impact on the environment.
- ✓ Financial support and tax exemptions for certified projects

## (2) For the price formation that takes costs into account,

- ✓ Establishing the measures for the obligation to make efforts by buyers and sellers and the code of conduct on the obligation.
- ✓ If the initiatives are insufficient, the Minister of Agriculture, Forestry and Fisheries provides guidance/advice or recommendation/publication (notification to the Japan Fair Trade Commission).
- ✓ Designating items for which costs are usually difficult to recognize in transactions and certifying organizations that create cost indicators.

### Specific measures for appropriate transactions



Source: Prepared by MAFF.

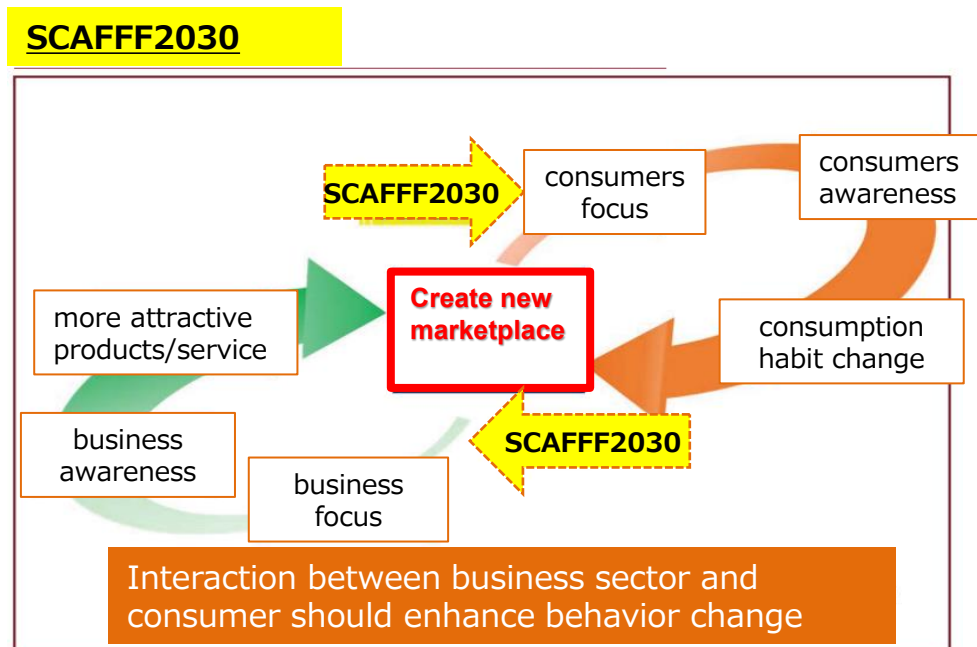
- In order to foster consumer understanding of food price formation, the "Fair Price Project," a public relations campaign to convey the actual conditions at sites of production, etc. and the background of rising costs in an easy-to-understand manner, is continuously implemented.

# 15 Direction

- ✓ In order for future generations to inherit food resource and a pleasant environment, we need to pay attention to various issues surrounding the natural environment, such as climate change and the biodiversity loss.
- ✓ In order to allow consumers to choose products produced in a healthy environment, the value of healthy and environmentally friendly activities needs to be visualized.
- ✓ A healthy and sustainable system cannot be created by an individual activity, therefore, each good activity needs to be connected throughout the food chain.
- ✓ The Ministry of Agriculture, Forestry and Fisheries is working on the "Consortium for Agriculture, Forestry and Fisheries and Food Sustainability 2030" ("SCAFFF2030"), a consortium of companies and organizations working to achieve sustainability in food and agriculture, visualize value, and promote environmentally friendly consumption.  
( [https://www.maff.go.jp/j/kanbo/kankyo/seisaku/being\\_sustainable/sustainable2030.html](https://www.maff.go.jp/j/kanbo/kankyo/seisaku/being_sustainable/sustainable2030.html) )

Visualization import supply chain

Import Food Commodity





**Thank you**