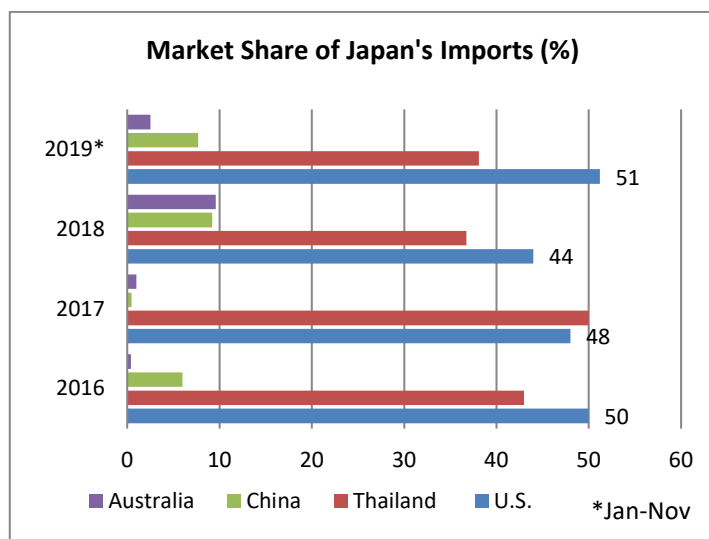


General Information

Population: 126.2 million

Population Growth Rate: -0.24% per annum

Per Capita Rice Consumption: 119 lbs.



Rice Trade Data (MT)

	2019*	2018	2017	2016
U.S. Exports	285,086	296,478	328,614	342,635
<small>Data Source: USDA GATS</small>				
Total Imports	639,508	671,782	679,108	685,943
<small>Data Source: USDA Global Trade Atlas</small>				

*Jan-Nov

U.S. Rice Imports (2019): Type and Form
94% MG milled; 4% broken rice; 2% SG milled

USA Rice Federation Budget (USD)	2018-2019	2017-2018	2016-2017	2015-2016
FAS Funds: MAP	168,500	424,500	424,500	424,500
FAS Funds: FMD	349,500	82,500	82,500	82,500
FAS Funds: ATP	30,000	0	0	0
Industry Funds	12,500	9,000	12,000	12,000
Total Budget Expenditure	560,500	516,000	519,000	519,000

Market Conditions:

- Japan is a high value, cash market and is the largest export market for U.S. japonica rice.
- Government policy severely restricts market access and market development efforts.
- Japan's domestic rice policy has resulted in a dearth of reasonably priced rice preferred by foodservice.
- U.S. rice was very successful in 2016-2018 SBS tenders.
- Rice was left out of the Phase 1 of U.S.-Japan bilats – Phase 2 discussions expected to begin in spring 2020.
- MRL and GE testing requirements are costly and time-consuming which are impediments for SBS rice sales.

Goals in this Market: Establish an image of U.S. rice as a high quality rice which is better suited for certain uses than domestic rice. Work with FAS and USTR to push MAFF to fulfill its MA and SBS requirements including purchasing the full 100,000 MT of SBS rice annually.

Marketing Related Issues:

1. Constraints

- a. Government policy denies meaningful market access.
- b. Lack of awareness of U.S. rice and its attributes among some in the trade and consumers generally.

2. Primary Target Group

Foodservice Operators and Consumers (through media).

3. Strategy

Develop a commercial market for U.S. rice to showcase its quality and attributes.

4. Activities

- Tie-in promotion campaign with supermarkets, hotels and restaurants, in-store promotions, menu presentations to foodservice, food shows, website, chef rice recipe competitions and blogger/consumer tasting events.
- Greater focus on sushi, the highest valued end use for rice, to build on SBS success.

Major change(s) from last year going into this year's UES

Expanded geographic reach of promotions program.