

**The XIII International Rice Conference, 2018**  
**Piura, Peru**

# **How Is the Global Sushi Boom Influencing the Japonica Rice Markets in the World?**

**Shoichi Ito, *Ph.D., Professor Emeritus***

**[s.ito.250@m.kyushu-u.ac.jp](mailto:s.ito.250@m.kyushu-u.ac.jp)**

***Kyushu University, Japan***

**<http://worldfood.apionet.or.jp>**

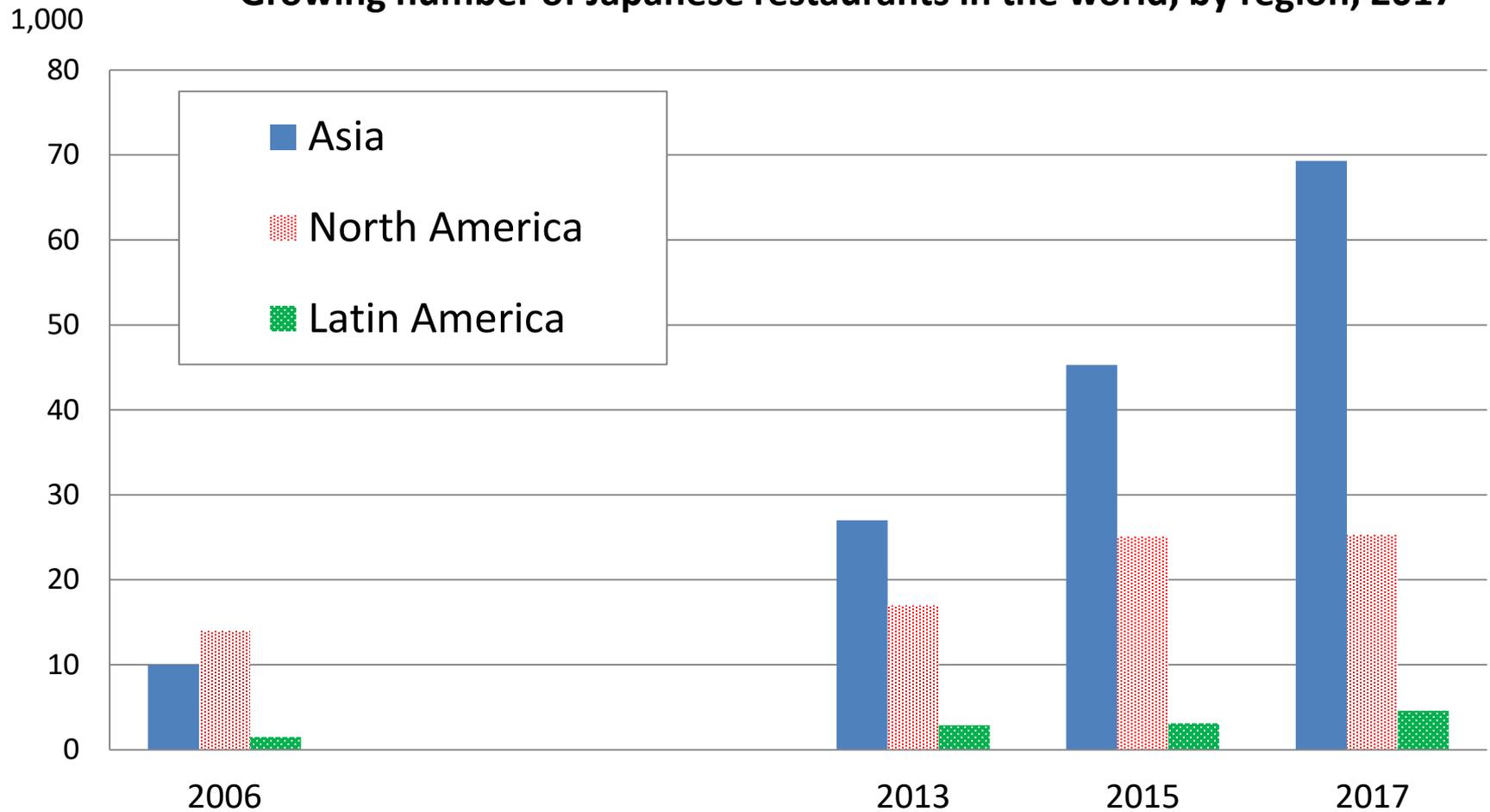
**May 15, 2018**

## - Today's Features -

- Global booming of Sushi and Japanese restaurants
- Characteristics of japonica vs. indica rice prices
- Japonica rice production in the world
- California rice dominates the global markets
- Retail prices of japonica rice
- Japonica rice exports from Japan...
- What to expect for the future?

**Global booming of  
Japanese restaurants...**

## Growing number of Japanese restaurants in the world, by region, 2017



Source: Ministry of Agriculture, Forestry and Fisheries, August 2017

## Growing number of Japanese restaurants in the world, by region, 2017

	Asia	Russia	EU	North America	Latin America	Middle East	Africa	Oceania	World Total
2006	10,000	1,000	2,500	14,000	1,500	100	50	1000	30,150
2013	27,000	1,200	5,500	17,000	2,900	250	150	700	54,700
2015	45,300	1,850	10,550	25,100	3,100	600	300	1,850	88,650
2017	69,300	2,400	12,200	25,300	4,600	950	350	2,400	117,500
Increasing rate 2017/2015	153%	130%	116%	101%	148%	158%	117%	130%	133%

Source: Ministry of Agriculture, Forestry and Fisheries, August 2017

citibank

# MARUKAI MARKET

3832

3842

♿  
PARKING  
ONLY  
NO STOP

NO PARKING

6CRF844



**SALMON**  
RICE BALL

\$1.29 NET WT. 3.5 OZ (100 G)

INGREDIENTS: COOKED PINK SALMON, SALAD DRESSING

**SPICY TUNA MATUNO**

\$1.29 NET WT.

**PICKLED P**

\$1.29 NET WT.

**BENTO**  
お弁当

**SPAM MUSUBI**  
(PLAIN)

\$1.79 NET WT. 4.5 OZ (128 G)



\$ 6.50



85  
\$ 7.00



85  
\$ 9.00

85  
\$14.00

KIRIKOMA  
NATURALS  
SUSHI





Everyday Low Price  
**TAMAKI GOLD 15lb**  
15LB  
**\$33.88**  
No Membership Required  
Dept#: 210



Our cashier is on right.



Our cashier is on right.



Side Items  
Will Differ From  
Display



牛丼  
Beef Bowl  
23 \$7.25



カン丼  
Pork Collar Bowl  
24 \$7.25



とんかつ定食  
Pork Cutlet Plate  
5 \$9.50



カキフライ定食  
Fried Chicken Plate  
7 \$9.50



チキンカツ定食  
Chicken Katsu Plate  
6 \$9.25



キカレーライス  
Curry Rice  
28 \$8.50



サケ塩焼き定食  
Baked Fish Plate  
12 \$9.75



鶏肉カレーライス  
Chicken Curry Rice  
27 \$8.00

WATEISHOKU KANEDA  
Menu listing various items and prices.



焼肉定食  
BBQ Beef Plate  
2 \$9.25



鶏唐揚げ定食  
Chicken Karaage Plate  
10 \$8.25



豚骨定食  
Pork Bone Soup  
4 \$8.75



Sakura Ya

73-05

Sakura Ya

73-05

Sakura Ya

Miele

NO PARKING

ALL INFORMATION  
HEREIN IS UNCLASSIFIED  
DATE 08-11-2010 BY 60322  
UCBAW/STP/STP/STP/STP/STP

5-14-747A



WHITE	10LB	10.99
WHITE	5LB	5.99
BROWN	10LB	9.99
HAIRA	5LB	5.99
HAIRA	10LB	10.99
WHOLE GRAIN	10LB	10.99
BROWN	5LB	5.99
TAMASHIKI	10LB	10.99
WHITE	5LB	5.99
MOZON	10LB	10.99
WHITE	5LB	5.99
MITOMEGONE	10LB	10.99
WHITE	5LB	5.99
FUKUKA DENMAI	10LB	10.99
BROWN	5LB	5.99
SALE	10LB	10.99
SUKOTAKA DENMAI	10LB	10.99
BROWN	5LB	5.99
TAMAKI	10LB	10.99
WHITE	5LB	5.99
HAIRA	10LB	10.99
HAIRA	5LB	5.99
MATSURI	10LB	10.99
WHITE	5LB	5.99
SALE	10LB	10.99
GRAND	10LB	10.99
HAIRA	5LB	5.99
HORARI	10LB	10.99
WHITE	5LB	5.99
SALE	10LB	10.99
GRAND	10LB	10.99



**Beef Bowl**  
**\$4.99**

**Chicken Bowl**  
**\$4.59**

**Pork Bowl**  
**\$4.99**

**Fel Bowl**  
**\$5.99**

**Tempur**  
**\$4.**

**Salmon Teriyaki**  
**\$3.29**

**Mackerel Teriyaki**  
**\$3.99**

CAUTION HOT SURFACE AVOID CONTACT

CAUTION HOT SURFACE AVOID CONTACT

ポテトサラダ

中華わかめ

春雨サラダ



**RICE BALLS \$ 1.99**

★ SHRIMP  
★ TEMPURA  
★ えび天むす

★ SPICY SHRIMP  
★ TEMPURA  
★ スパイシー天むす

★ FR  
★ CHICKEN  
★ チキン唐揚げ

★ SALMON  
★ スパイシー鮭



**Bohemia**  
ECLECTIC CLOTHING DECOR

**HIBACHI**  
EXPRESS

**Bagel Boys**  
Cafe

105

**Bohemia**  
ECLECTIC CLOTHING DECOR

100%

9-10pm  
9-10pm - 6.50pm  
Sunday  
6-10pm / 5.00pm

**OPEN**

**P**  
FIRE LANE

104

Japanese Cur  
Hamp  
Seafood

104

Bohemia  
20%  
OFF  
TODAY



The sign for 'Lobster House SUSHI & HIBACHI' is mounted on the upper part of the building's facade. It features a stylized red and white lobster logo on the left. The words 'Lobster House' are in a large, purple, serif font, while 'SUSHI & HIBACHI' is in a smaller, grey, sans-serif font below it.

# Lobster House

## SUSHI & HIBACHI

10890

108 0







# HIBACHI

## BUFFET & GRILL

7045





NOTIFICATION TO ALL VISITORS:  
HELADOS SOLO PARA COMER EN EL LOCAL.  
PARA LLEVAR UN \$1 CADA UNO.  
GRACIAS. :)

ALL ICE CREAMS ARE FOR  
DINE-IN ONLY.  
FOR TAKE OUT \$1 EACH.  
THANK YOU. :P

Landscaping & Maintenance  
(770)333-9152









veg sushi platter  
₹1050



asparagus sushi  
₹350



avocad  
cucumbe  
₹350





Article No: 53002808  
30500000085581  
BUSHIMORE TUNA TARTARE ROLL  
400

**KIKKOMAN**  
Soy Sauce  
NATURALLY BREWED

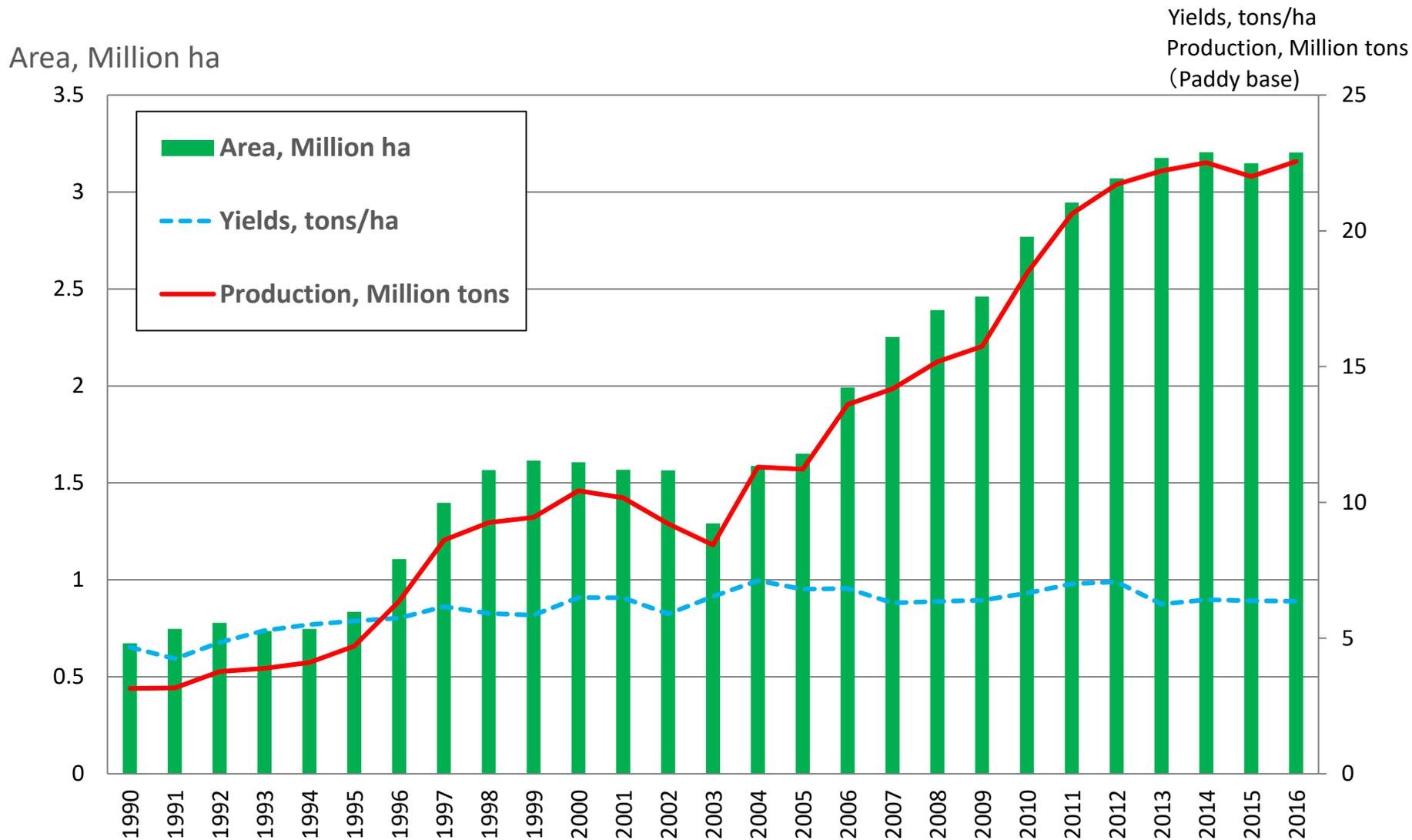
tuna tartare sushi  
₹400

PREPARED

# Who grows japonica rice in the world?

- **China**
  - About half of their rice production of 146 million metric tons (MMT, milled basis)  
Namely, about 60 MMT
  - Japonica rice production takes over indica rice.
- **Japan**
  - About 8 MMT
  - Production is decreasing gradually due to less domestic consumption.
- **S. Korea**
  - About 4 MMT
  - Production is also decreasing gradually due to less domestic consumption.
- **California/U.S.**
  - About 1.5 MMT
  - Production is unstable due to unfavorable weather.
- **Taiwan**
  - About 1.2 MMT
  - Production is stable for domestic consumption.
- **Italy, Egypt**
  - Potential to increase is large....
- **Southeast countries. and others**
  - Thailand, Vietnam, Myanmar, etc.
  - Also, potential is large.
  - Rio Grande do Sul, Brazil, ...

# Rice production in Heilongjiang Province, China, with areas and yields, 1990-'16

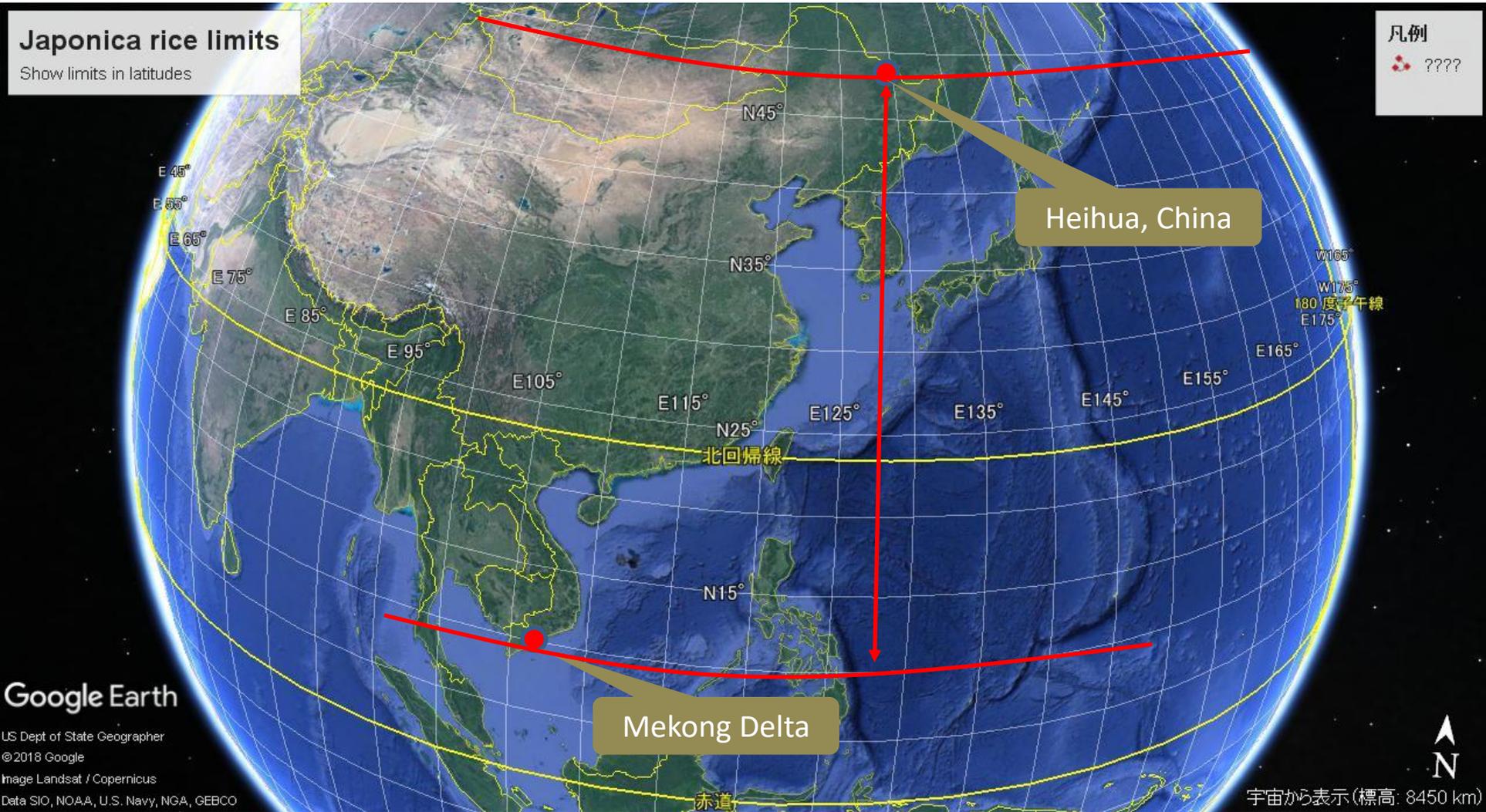


Source: China Rural Statistical Yearbook and National Bureau of Statistics of China (Several issues)

# Geographical limits in latitude for japonica rice

- **North**
  - Heihua, China: 47 degree, North
- **South**
  - Mekong River Delta, Vietnam: 10 degree, North

# Geographical limits in latitude for japonica rice

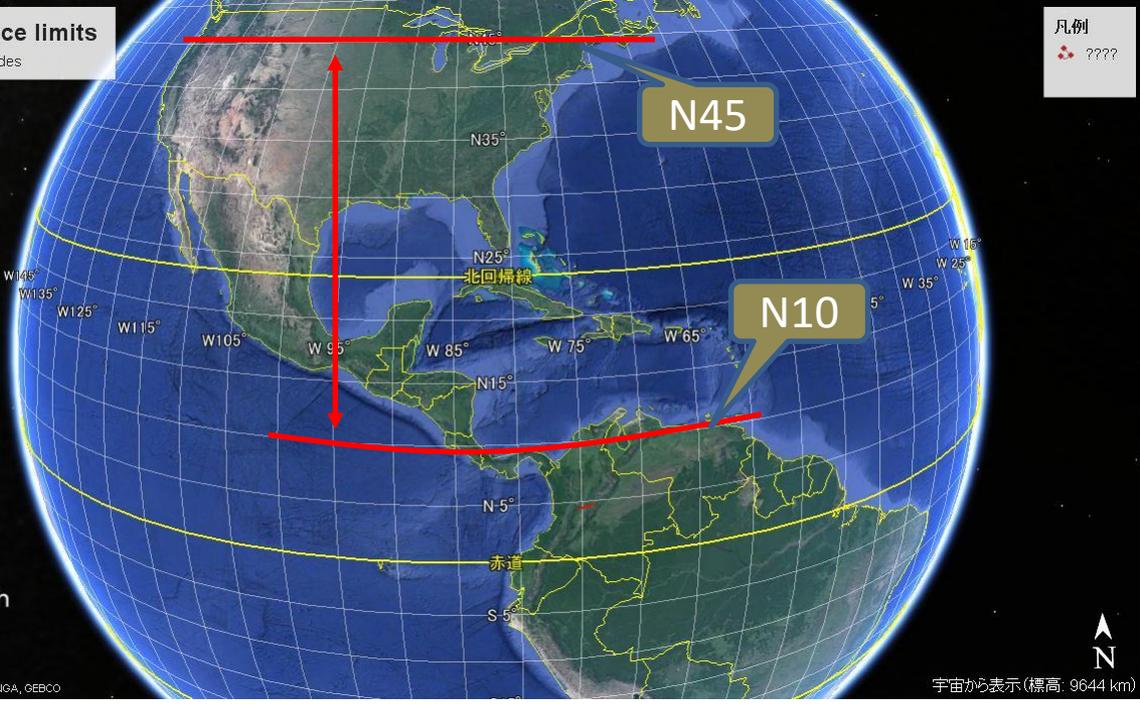


- **North**
  - Heihua, 47 degree, North
- **South**
  - Mekong Delta, Vietnam, 10 degree, North

# Japonica rice limits

Show limits in latitudes

凡例  
????

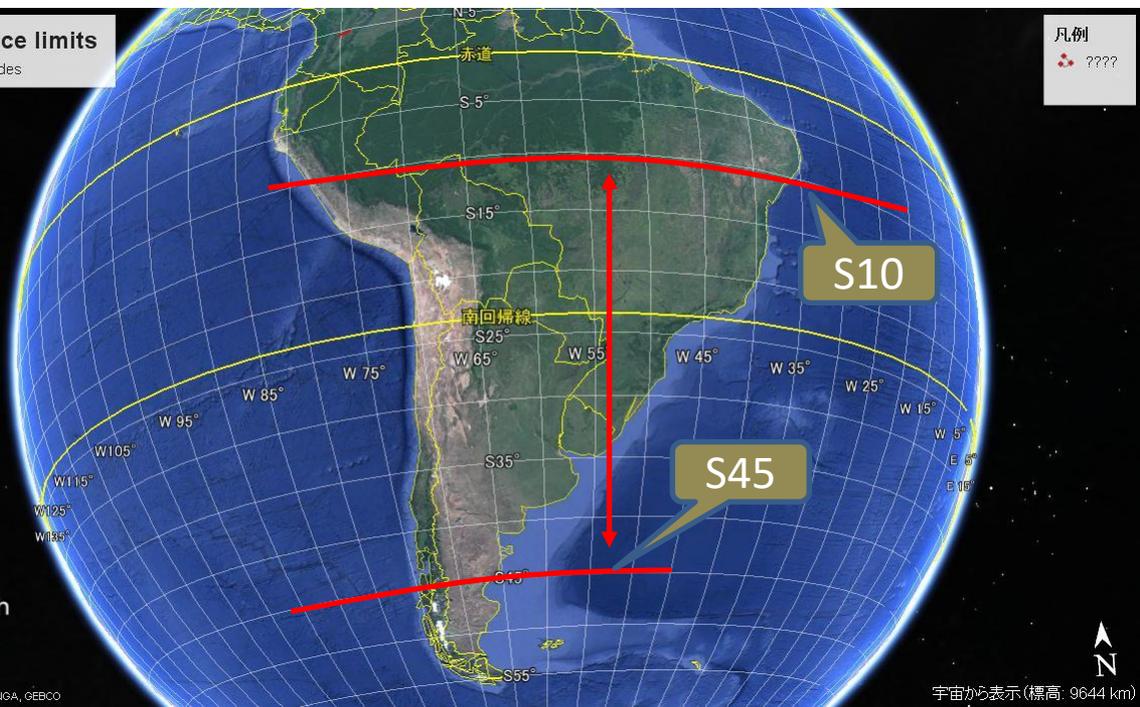


Google Earth  
US Dept of State Geographer  
©2018 Google  
Image Landsat / Copernicus  
Data SIO, NOAA, U.S. Navy, NGA, GEBCO

# Japonica rice limits

Show limits in latitudes

凡例  
????

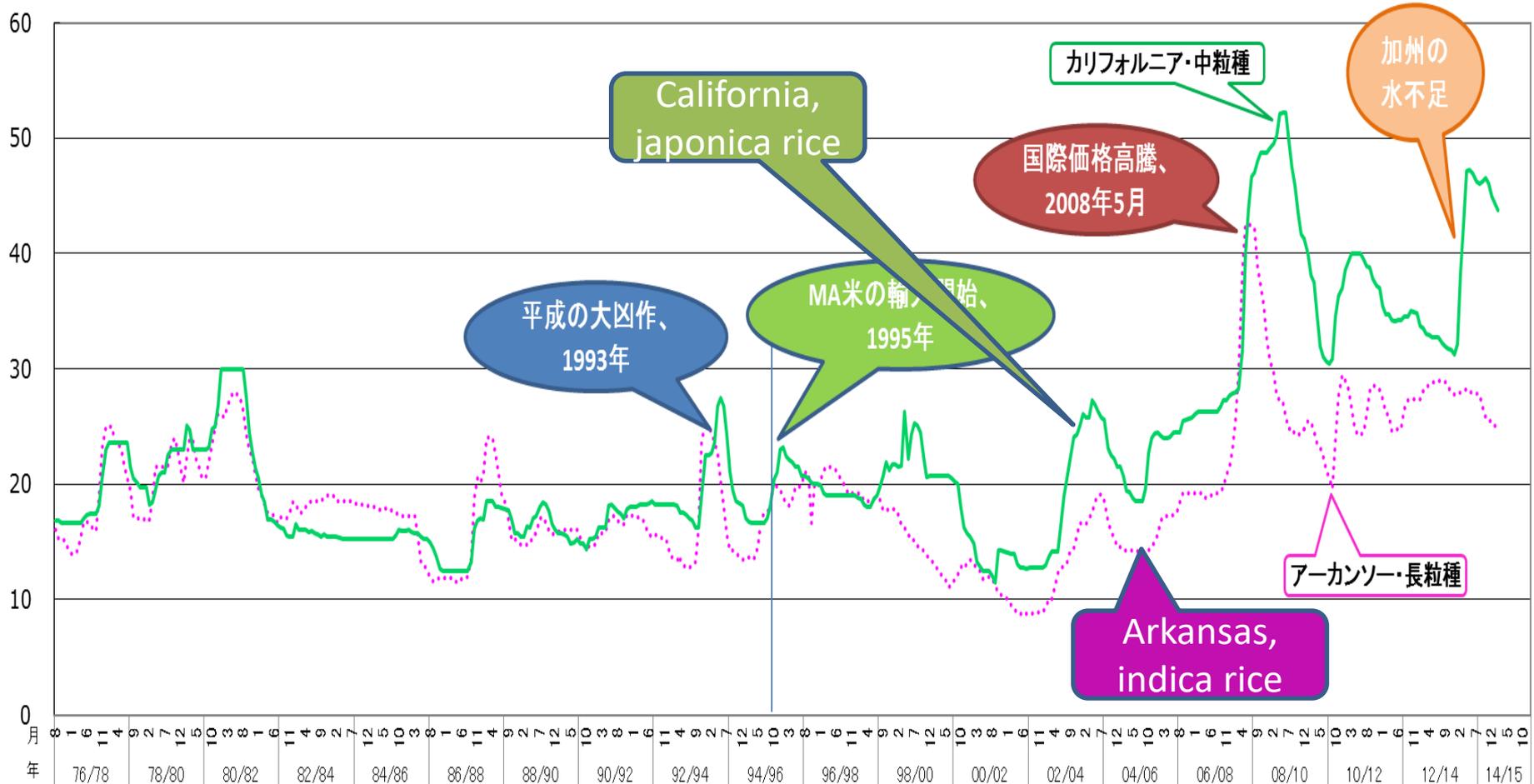


Google Earth  
US Dept of State Geographer  
©2018 Google  
Image Landsat / Copernicus  
Data SIO, NOAA, U.S. Navy, NGA, GEBCO

# **Characteristics of japonica vs. indica rice prices...**

# Price differences of japonica and indica rice in the U.S., FOB prices (Aug. 1976 – Feb. 2015)

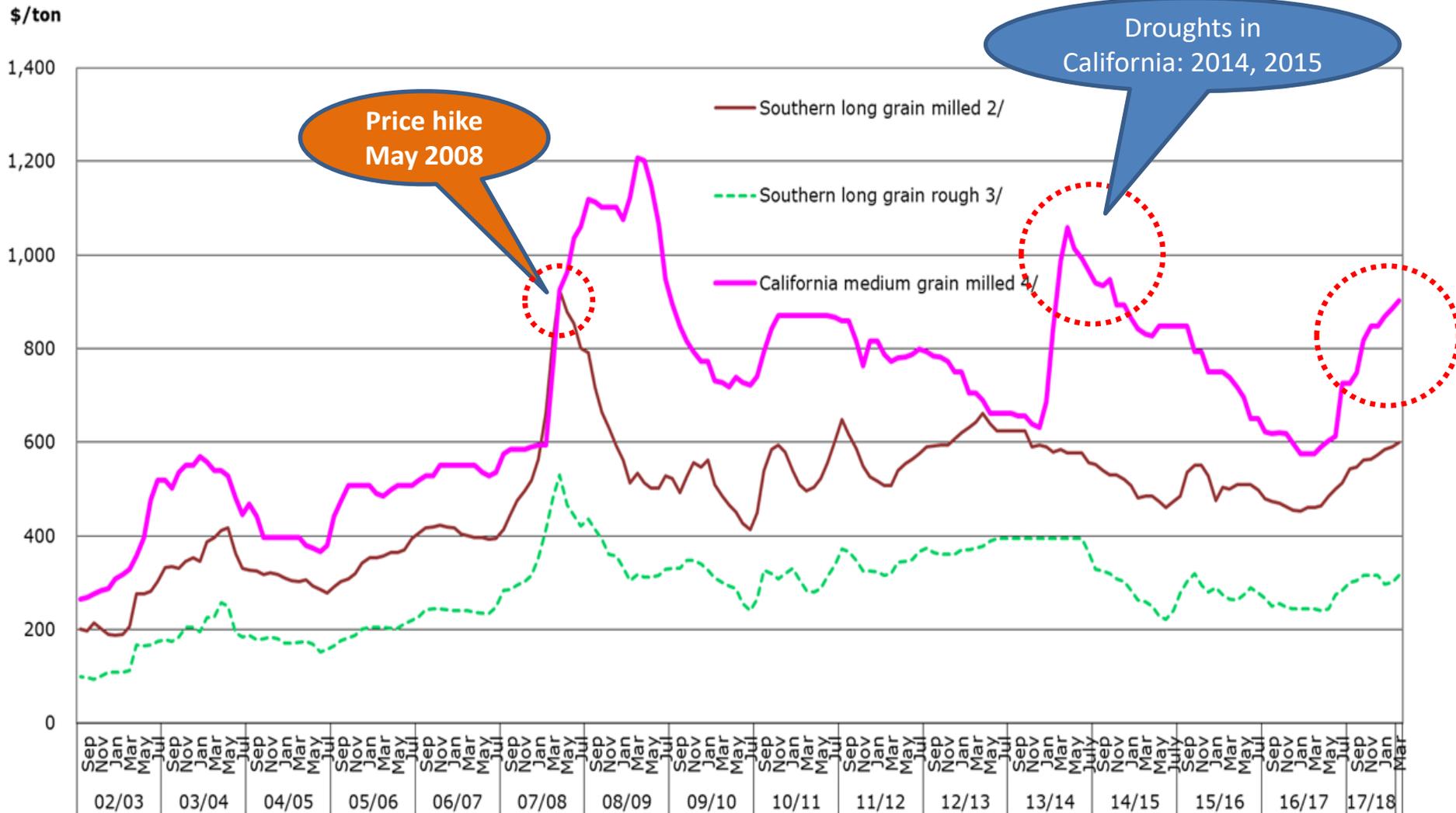
(\$/cwt, bagged)



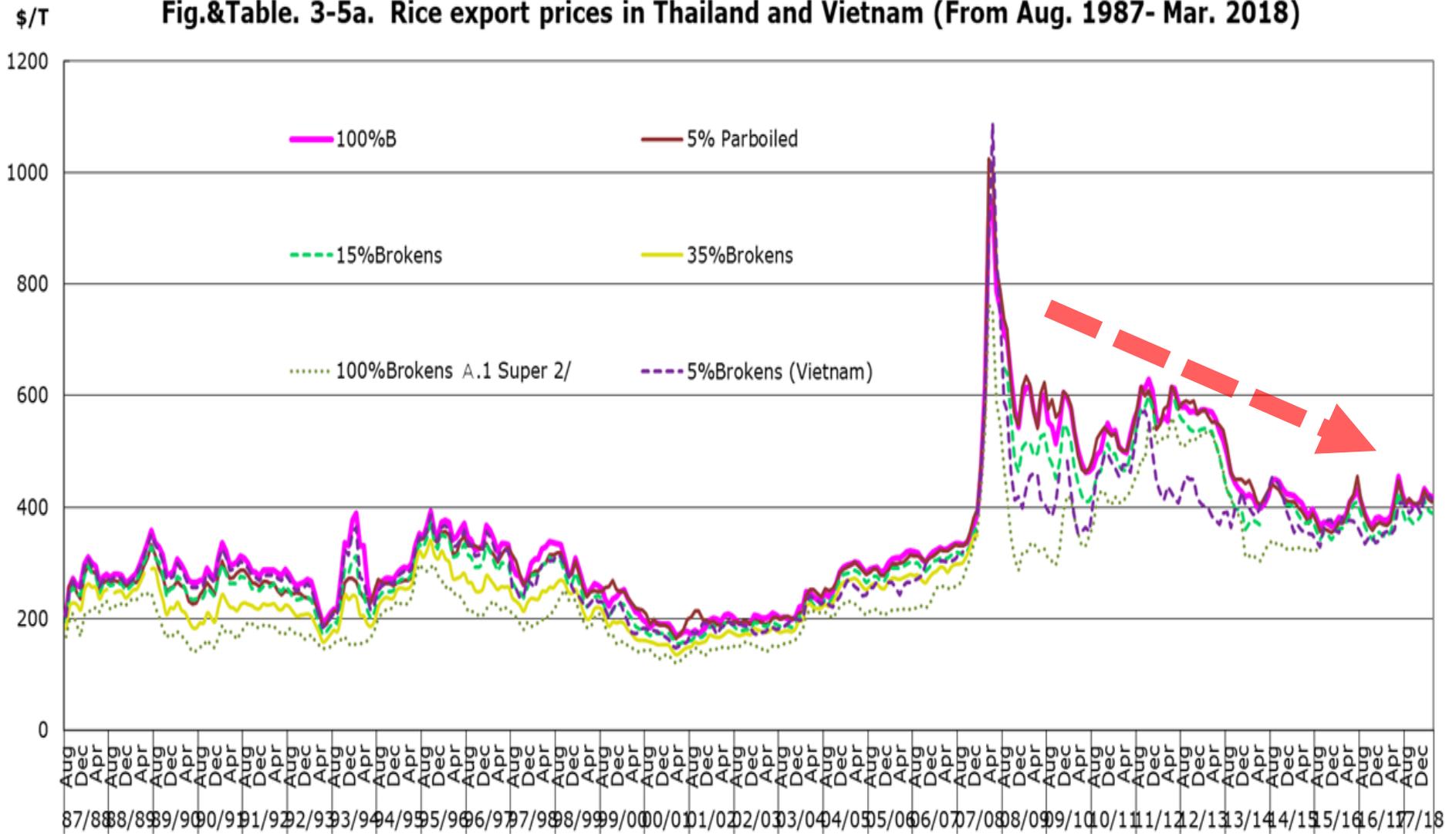
ソース: Rice Yearbook : Dataset, USDA, Agricultural Marketing Service, Rice Market News.  
伊東正一 <http://worldfood.apionet.or.jp/riceprice/ricepriceJ.htm>, June 2015

1995, Japan begins  
rice imports

**Fig.&Table 3-3. U.S. prices of milled rice (Aug. 2002 - Mar. 2018)**



**Fig.&Table. 3-5a. Rice export prices in Thailand and Vietnam (From Aug. 1987- Mar. 2018)**



NA=Not available. 1/ Simple average of weekly price quotes. Includes cost of bags. 2/ 100-percent broken.  
 Source: Thailand Grain and Feed Weekly Rice Price Update, U.S. Embassy, Bangkok. Last updated May 19, 2007,  
 Source: Aug. 1997~ Aug. 2004 (USDA): Rice Situation and Outlook Yearbook Aug. 2004~, Rice Outlook, Mar. 12, 2018  
 S. Ito, Department of Agricultural and Resource Economics, Faculty of Agriculture, Kyushu University, Japan

**Retail prices of japonica rice.....**

Table 8 Retail prices of japonica rice in the U.S. (Los Ang. Area)  
(Milled rice, August 2015)

SJ&SAC in June 2017

	US\$/15 lbs.(6.8kg)	US\$/10kg	Yen/10kg	Marukai's Yen/10kg	Oto's Yen/10kg
Tamaki Gold	33.88	49.82	5,730	4,055	5,748
Nishiki, white/Brn.	17.88	26.29	3,024	3,026	2,366
Nozomi	26.98	39.68	4,563	4,732	4,057
Tamanishiki	25.88	38.06	4,377	4,546	4,226
Koshihikari	18.97	27.90	3,208	4,717	4,226
Matsuri	24.98	36.74	4,225		3,888
Kagayaki	29.98	44.09	5,070		
Botan (Calrose rice)	12.98	19.09	2,195		
Hitomebore					4,226

注1: 米国の小売価格はロサンゼルス近郊のスーパー、SJ及びSACはサンノゼ市及びサクラメント市。

注2: 為替レートは1ドル115円として計算した。

## Retail prices of japonica rice in Milan, Italy

Brand names	Weight	Price, Euro	Yen/10kg
Yumenishiki	10kg	38.2	4,966
Yumenishiki	1kg	5.0	--
Akai Suren	10kg	13.9	1,807
Riso per Sushi	10kg	16.8	2,184
Riso per Sushi	1kg	2.0	--
Sushi Rice	10kg	14.5	1,885
Okome-san	1kg	3.4	--
Nishiki	40kg	49.9	1,622

(K shop in Milan, Oct. 2, 2017)

1 Euro = 130 Japanese yen

**California dominates the global  
japonica rice markets.....**

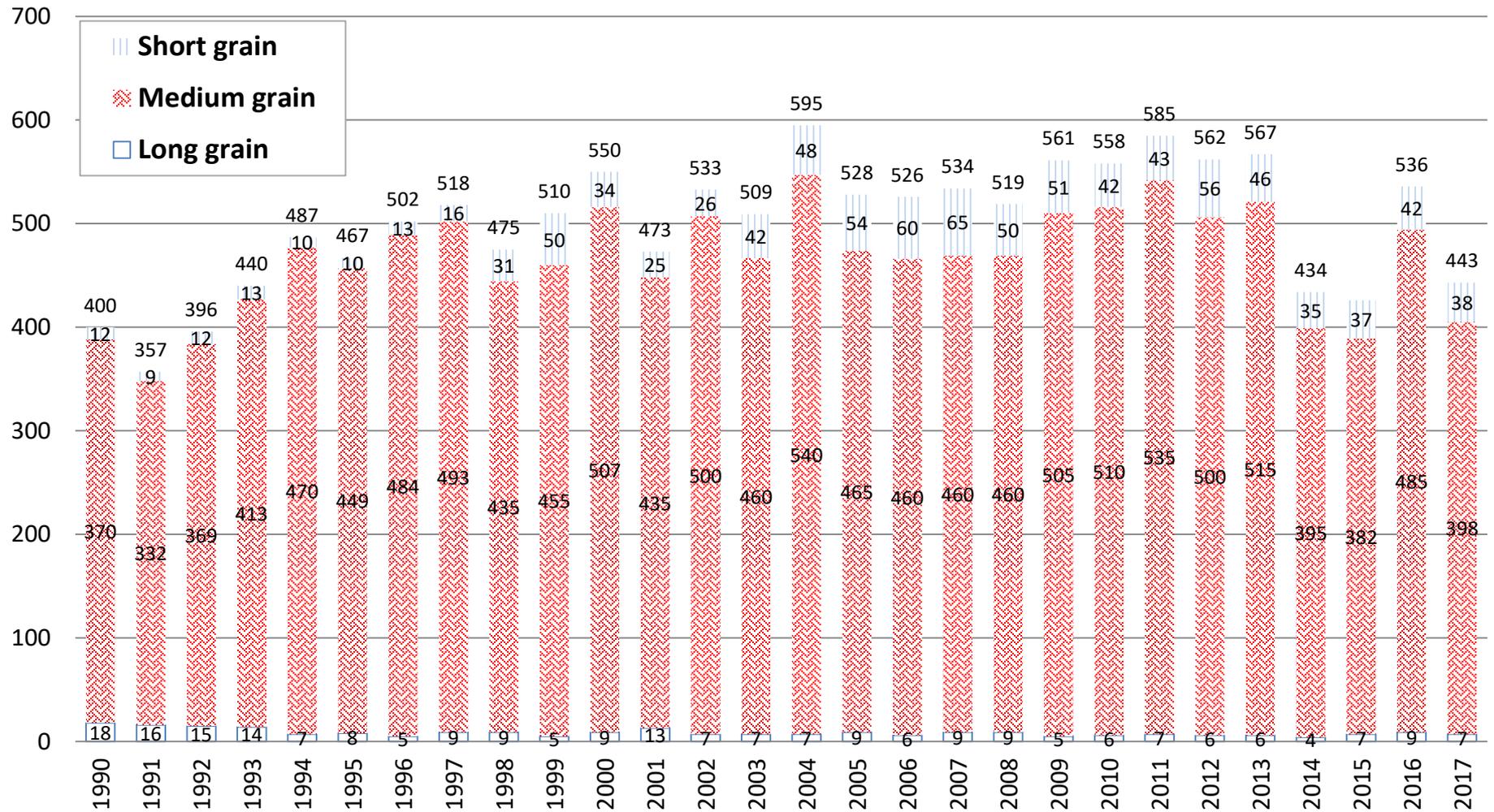
# Rice in California, Prod., Distrib'n., 2011

(million tons, milled basis)



Source: USDA: Rice Outlook, Feb. 2012

1,000 Acres **Rice planted areas by type, long/medium/short grains, 1990 - 2017**



Source : USDA Rice Yearbook(Several issues including May 2018 issue.)

# Does Japan export rice?

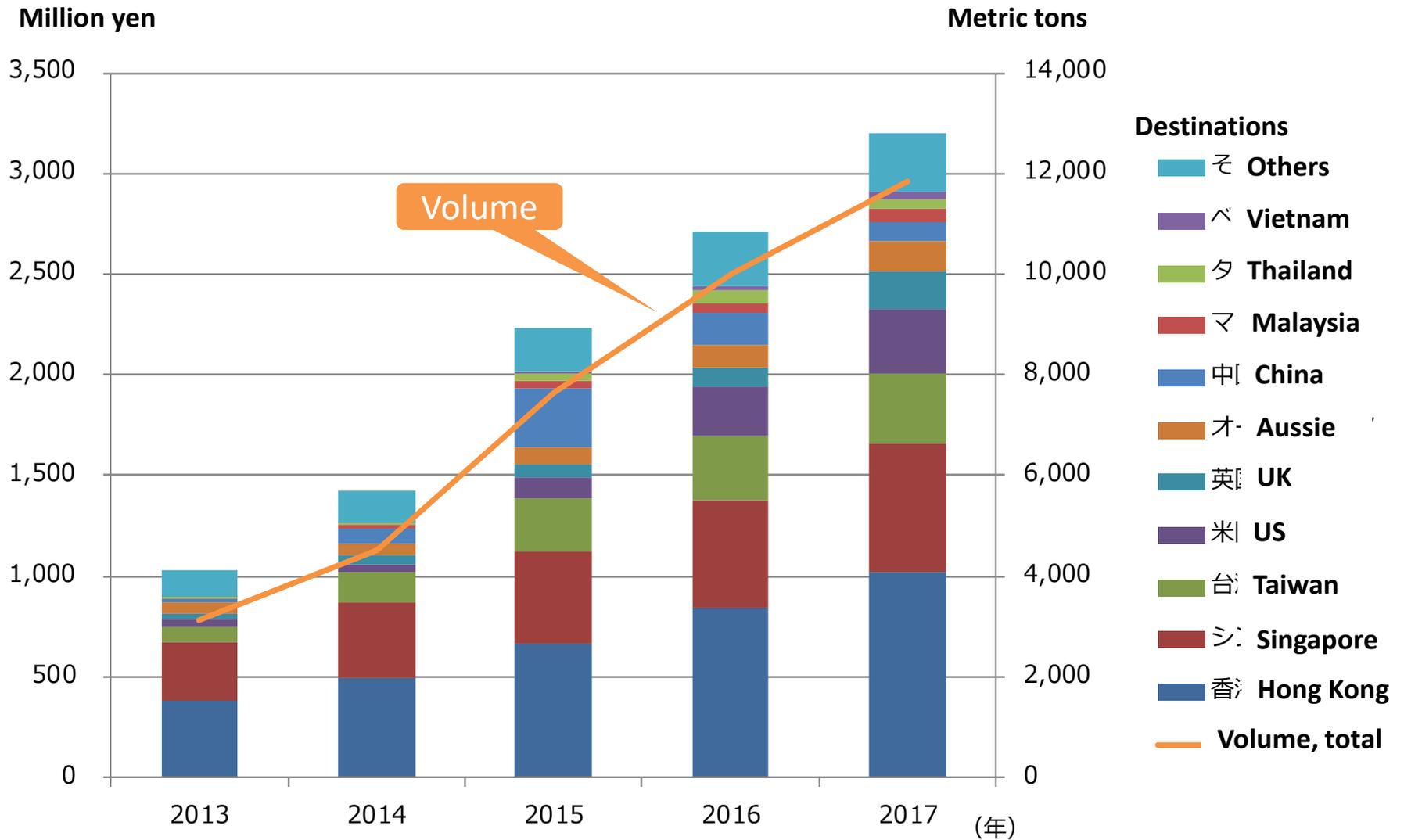
**YES!! But, out of 8 million tons of production**

**Only 0.1% !!**

**Huge barriers to export...**

**Inappropriate policies  
(Subsidies for feed-rice production, etc.)**

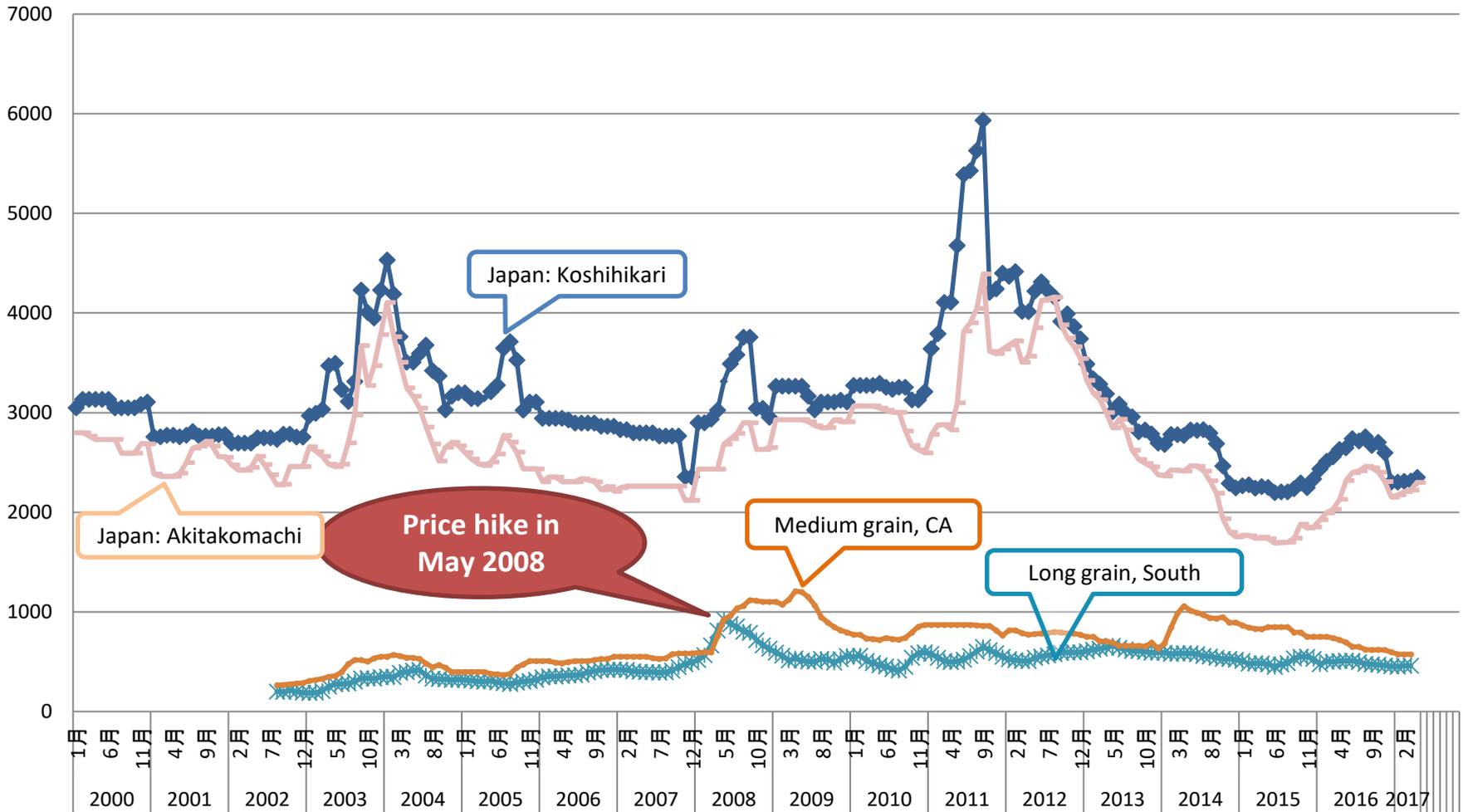
# Rice exports from Japan, commercial only (2013 – '17)



# Comparison of rice market prices between the U.S. and Japan

(Jan. 2000 – Apr. 2017)

\$/MT (milled basis)



Sources: Nikkei Shimbun Journal and USDA

Exchange Rates(monthly averages) are from Mitsubishi UFJ Research and Consulting

# What to expect in japonica rice markets for the future?

- **Japanese food booming will possibly continue next two decades....**
  - The booming in the U.S., where it started, still goes on...
  - The rest of the areas are growing really fast,
  - Globally, more people enjoy Japanese restaurants....
- **Japan, S. Korea or Taiwan cannot increase export much**
  - They are very slow to increase due to unfamiliarity of ag. export business and policies.
  - Production is decreasing gradually due to less domestic consumption.
- **California/U.S. either...**
  - Water limitation: water is in the market, sell water or grow rice...
  - In the South, they cannot grow California varieties due to protection.
- **Italy, Egypt**
  - Potential to increase is large....
- **Southeast Asian countries. and others**
  - Thailand, Vietnam, Myanmar, etc.
  - Also, potential is large.
  - Rio Grande do Sul, Brazil, ...



Let's eat more rice!!

Thank you for your attention!

# Announcement for

- 3<sup>rd</sup> International Rice Conference in Kyoto, Japan
- Once in 10 years, organized by Tsuno Food-Functions Industry Corp'n.
- November 29-30, 2018