

Mapping the Japanese Rice Industry: Price, Contract, Inventory, Governance, and Explanatory Structures from Producers to Consumers, and the Limits of Public Traceability

Translation note: This English edition translates the Japanese version v1.0.1 without changing its analytical results, numerical values, evidence boundaries, or conclusions.

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<https://github.com/yokken0907/japanese-rice-industry-structure-audit>

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Abstract

This study reconstructs the Japanese rice industry not as a single price chain but as a multi-actor network in which goods, money, information, risk, authority, and explanations move at different speeds and levels of aggregation. Using public statistics, administrative and legal records, industry statements, and a purposively sampled media corpus, the audit fixed price stage, unit, period, product, and contract conditions before testing end-to-end traceability. Public sources provide substantial visibility into quantities, stage-level averages, production costs, inventory volumes, retail transaction prices, and policy outputs. They do not, however, permit continuous monetary tracing of the same contract, inventory cohort, or product. Four principal breaks were identified: the producer's final receipt, inventory acquisition cost, absolute wholesale selling prices, and product-level retail procurement, costs, and profits. Consequently, price-stage differences or bridge residuals cannot by themselves identify wholesale or retail profit, profiteering, or the contribution of a single actor. Policy responses since 2025 shifted from conditional auctions to downstream direct contracts, official self-review, and statistical and legal redesign, while the pure retail-price effect of reserve-rice releases and the practical effectiveness of the new reporting system remain unidentified. A staged transparency architecture is proposed as a design implication: common metadata and measurement

crosswalks, anonymous price-bridge pilots, and eventually an integrated six-flow and cohort infrastructure. The study does not determine a fair price, a profiteering actor, collusion, or a pure policy effect; it specifies what is observable, where public traceability breaks, and what evidence would update the conclusions.

Keywords: rice industry; price formation; traceability; supply chain; inventory; governance; Japan

1. Introduction

From the 2024 crop through 2025, public debate over rice in Japan expanded rapidly around sharp increases in retail prices, perceptions of scarcity, releases of government reserve rice, higher advance payments to producers, wholesale inventories, and the continuity of farm operations. Events at different stages were presented side by side as possible causes: 'shortage,' 'clogged distribution,' 'stockpiling,' agricultural cooperatives, wholesalers, and government policy. Yet the amount received by producers, collectors' contracts, inventory acquisition costs, wholesale selling prices, and retail procurement and transaction prices are not observations from the same statistical series. The more public attention converges on a single price, the easier it becomes to lose sight of which point in the industry that price actually measures. [6,18,22,34]

Rice is simultaneously an agricultural product, a staple food, a regional resource, a policy reserve, a processing input, a branded commodity, and a component of household expenditure. It is produced through farmland and irrigation, machinery, fertilizer, finance, and family labor, then passes through collection, pooled settlement, outright purchase, storage, milling, packaging, logistics, retail, and food service before consumption. Demand-and-supply forecasts, reserve systems, transaction records, price indicators, media reporting, and actor explanations also influence decisions at each stage. Understanding the rice industry therefore requires simultaneous attention not only to physical distribution but also to the flows of money, information, risk, authority, and explanation. [1,8,16,22]

The purpose of this study is not to select a 'culprit' for rising rice prices. First, it reconstructs the main actors and connections in the Japanese rice industry from upstream to downstream using public information. Second, it fixes what each price series measures and the conditions under which comparisons are valid. Third, it identifies how far monetary values can be traced as the same contract, inventory, and product, and where continuity breaks. Fourth, it returns policy decisions and actor explanations to their positions in the industry structure, separating observed facts, bounded interpretations, and unobserved elements.

The term traceability in this study is not synonymous with transaction records and origin-information transmission under Japan's Rice Traceability Act. A legal record may exist without being publicly available in a form that continuously links price, quantity, product, contract, ownership, and time. This paper asks whether a third party can reconstruct the same route using only publicly released materials. [1,6,10,11]

The question concerns not only the amount of disclosure but also the connectability of information. Even where many monthly publications exist, a large number of documents does not guarantee continuous tracing unless crop year, contract month, sales month, product form, and price stage are aligned. Conversely, not every individual transaction must be made public if anonymous distributions with common definitions are sufficient to test where prices and risks were transferred. The study therefore seeks the minimum connecting information needed for verification, rather than treating the issue as a binary choice between full disclosure and opacity.

The central finding can be stated in advance. Public sources make rice quantities, stage-level average prices, production costs, inventory volumes, POS prices, and policy implementation volumes substantially visible. The information needed to trace the same product monetarily from upstream to downstream is not continuous, however. The main breaks concern the producer's final receipt, inventory acquisition cost, absolute wholesale selling prices in yen, and product-level retail procurement, costs, and profits. This does not mean that distribution is wholly invisible. It means that visible information exists for different measurement purposes and at different levels of aggregation, preventing price differences from being converted directly into profit or the contribution of a single actor.

2. Audit Scope, Sources, and Methods

2.1 Scope

The audit covers production, distribution, consumption, and policy processes centered on domestically produced table rice. The main route extends from pre-production inputs, finance, farmland, and irrigation through producers, Japan Agricultural Cooperatives (JA) and private collectors, prefectural and national pooled settlements, storage, wholesale, milling, packaging, logistics, retail, food service, and consumers. Direct sales, e-commerce, self-consumption, informal transfers, specialty rice shops, drugstores, and other channels are recorded as important routes outside the main pathway and as limits of coverage. [1] This is not a price-determination model or causal estimate. It is a public-information traceability audit of the definitions, connectability, provenance, and claim boundaries of public statistics and official materials.

The analysis cutoff is, in principle, August 5, 2026. Crop year, calendar year, contract month, sales month, POS week, and the submission, passage, promulgation, and enforcement of legislation are distinguished. Dynamic statistics are fixed at the time of acquisition so that historical values are not silently overwritten by later publications. The policy process separates information available at the time from subsequent official self-review. [6,12,18,22,31,32]

2.2 Evidence Hierarchy

Evidence was divided into primary official statistics, primary administrative and legal materials, first-party explanations by actors, reporting and commentary, and audit-derived calculations. Primary official sources were prioritized for production costs, inventory volumes, POS data, household data, and policy implementation quantities. Statements by JA, wholesalers, retailers, and other actors were used as evidence of what those actors explained, not as independent proof that the explanations were true. Media sources were limited to records of events, quoted statements, and social framing, and the purposively sampled articles were not generalized to all reporting. [2,4,12,18,22,34,35,36,38,39,40]

Each conclusion was classified as one of five types: direct or strong conclusion, bounded conclusion, design implication, research hypothesis, or non-claim. Strong conclusions were based on official definitions or agreement across multiple stages. Bounded conclusions recorded alternative explanations and unobserved information in the same location. Mechanisms such as high-cost inventory that were plausible but could not be tested at national scale were treated as verifiable interpretations rather than established findings. Profit, collusion, fair price, and pure policy effects were designated as non-claims because the required connecting information was unavailable.

For reproducibility, source values, conversion rules, derived calculations, and claim boundaries were separated into machine-readable registers. Numerical values in the text retain the definitions of the original sources, while derived values record formulas and parameters. Third-party works such as source PDFs are retained for internal audit, whereas the public archive emphasizes URLs, acquisition dates, hashes, and derived tables, thereby separating redistributability from reproducibility.

2.3 Six Flows and Price Stages

The industry structure is described through six flows: goods, money, information, risk, authority, and explanation. The goods flow consists of movements of brown rice, milled rice, and packaged products. The money flow includes payments, settlements, costs, and prices. The information flow includes statistics, contracts, inventories, and supply-demand forecasts. The risk flow includes price fluctuation, inventory, credit, and waste. The authority flow includes contractual, legal, and policy intervention powers. The explanation flow consists of the meanings assigned by government, industry, media, and consumers.

Price stages are organized as production cost C0, advance payment (gaisankin) P0, producer's final receipt P1, negotiated transaction price P2, wholesale selling price P3, and retail transaction price P4. C0 is an economic cost; P0 and P1 are payments to producers; P2 is a transaction between shippers and wholesalers or similar actors; P3 is a sale from wholesale to retail or food service; and P4 is the price paid by consumers. Differences across stages mix quality, product transformation, freight, storage, milling, packaging, promotion, store costs, timing, product composition, and other factors. [2,3,6,7,13,14,15,18]

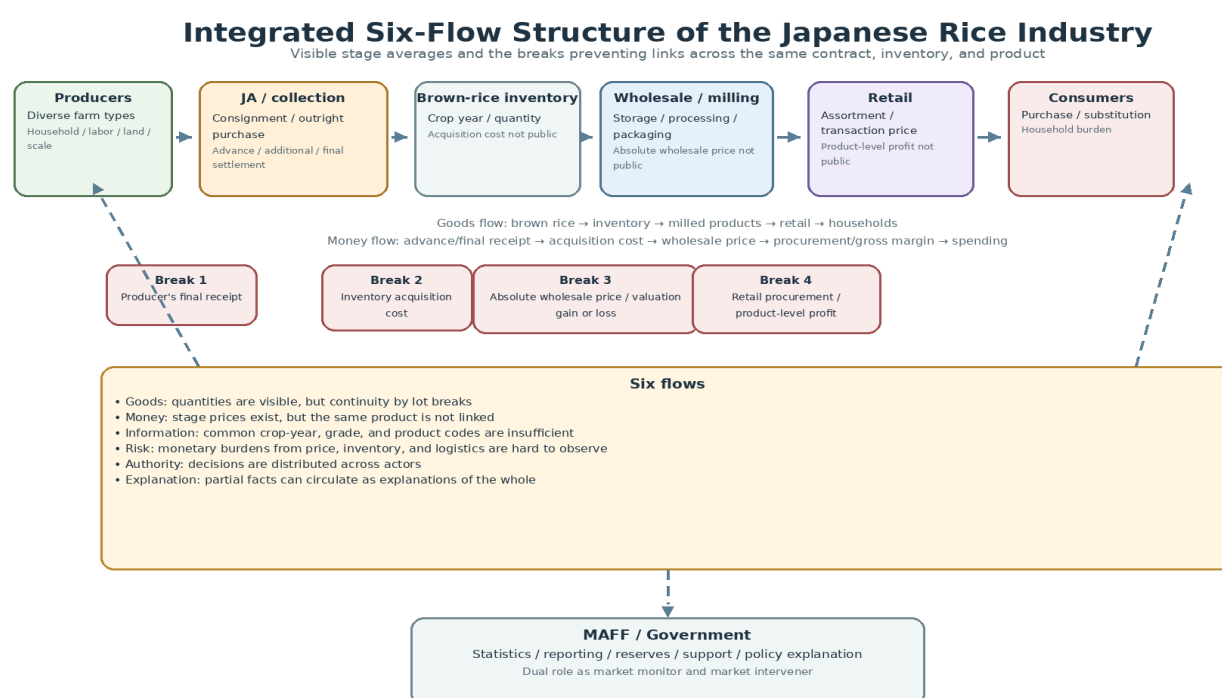


Figure 1. Main Pathway and Six Flows of the Japanese Rice Industry

Source and note: Prepared by the author. Principal structural sources are references [1,6,8,10,16,18,22].

2.4 Conversion and Comparison Contract

Conversions were classified as L0, which retains source values; L1, which converts kg, 60 kg, 5 kg, or an explicitly stated tax rate; L2, which uses source-backed parameters such as milling yield; and L3, which involves a model or imputation. The principal conclusions use L0-L2, while L3 is limited to sensitivity analysis or future research. Arithmetic conversion to the same unit is separated from economic comparability. [3,6,14,17]

For example, converting the June 2026 negotiated transaction price of JPY 31,305 per 60 kg of brown rice, including tax, to an equivalent 5 kg of milled rice at a milling yield of 88.8% gives approximately JPY 2,938. The national supermarket POS average for July 20-26, 2026 was JPY 3,311 per 5 kg of milled rice, including tax. The difference of approximately JPY 373 is not a difference for the same lot, product, or time. It is a price-bridge residual that may contain processing, quality, logistics, packaging, store costs, product composition, profit, timing, and other factors. It is not called profit or margin. [6,17,18]

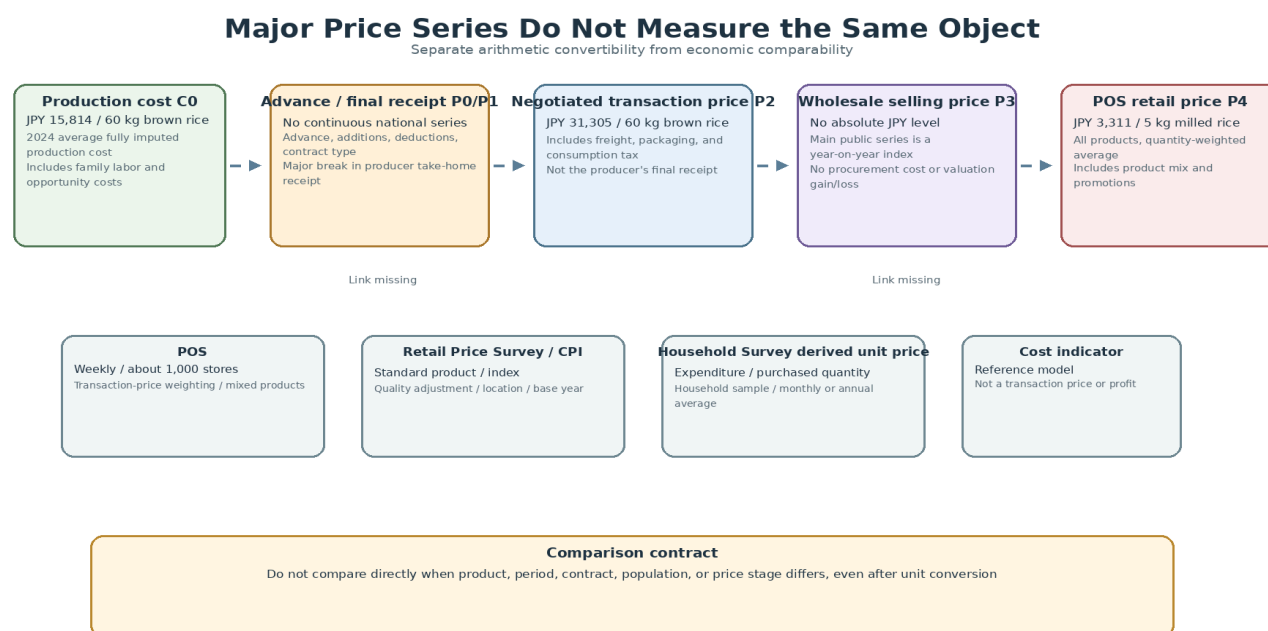


Figure 2. Major Price Series and Comparison Boundaries

Source and note: Prepared by the author. Numerical examples are based on references [2,6,13,14,18,19].

Table 1. Audit Scope, Actors, Sources, and Principal Limitations

Area	Principal actors and processes	Main public sources	Core limitation
Pre-production and production	Inputs, finance, farmland and irrigation, producers	Production costs, farm-type statistics, farm-management materials	Linkage to household accounts, assets and liabilities, and replacement investment
Collection and settlement	JA, ZEN-NOH, private collectors, direct sales	Advance-payment explanations, pooled-settlement cases, shipment contracts	National distribution of final receipts and contract types
Inventory, wholesale, and processing	Collection, wholesale, storage, milling, logistics	Private inventory, sales indices, milling yield, cost indicators	Acquisition cost, absolute selling prices, valuation gains and losses
Retail, food service, and consumption	Supermarkets, specialty rice shops, food service, households	POS, Retail Price Survey, CPI, Household Survey	Product-level procurement, promotion, profit, and household distribution
Policy and explanation	Government, councils, industry, media, consumers	Policy materials, laws, statements, articles	Pure causal effects, institutional effectiveness, representativeness

3. Structure of the Japanese Rice Industry from Upstream to Downstream

Rice does not move in a straight line from field to retail shelf. Before producers are seed, fertilizer, agricultural chemicals, fuel, machinery, facilities, finance, farmland, irrigation, and community resource management. After harvest come drying and preparation, inspection, shipping, storage, milling, grading, blending, packaging, logistics, shelf allocation, promotion, and cooking. Quantities change at each stage, as do the nature of costs and the actors who bear them. [1,2,3,16,17]

MAFF materials on distribution volumes by channel show not only routes through JA and other collection and shipping organizations but also direct sales to businesses, direct sales to consumers, self-consumption, informal transfers, and sales to food-service and prepared-food businesses. The negotiated transaction price for rice moving through JA therefore cannot be treated as the representative price for all rice transactions in Japan. At the same time, major statistics are designed mainly around large or principal channels, making small-scale, direct-sales, and multi-format routes relatively difficult to observe. [1,6]

The goods flow loses weight when brown rice is converted into milled rice. In the monthly milling survey for the 2025 crop, yields were generally 88.4-89.0%, and the June 2026 value was 88.9%. Weight conversion is a foundation of the price bridge, but yield differences depend on quality, raw material, equipment, and product composition. A standard yield cannot be applied mechanically to every transaction. [17]

The money flow does not move at the same time as the goods flow. Producers may receive an advance payment at shipment and an additional settlement after sales progress and costs are finalized. Under outright purchase, ownership and price risk transfer early; under consignment, the sales outcome is reflected in the later settlement. At wholesale and retail, the lag between procurement and sale creates inventory cost and profit or loss. Because of this time difference, a retail price in one month cannot be linked as the same cohort to an upstream price in that same month. [7,8,9,11]

Information flows are also asymmetric. Government separately observes collection, contracts, sales, inventories, POS data, and other series; businesses know their own contracts and costs; and consumers observe retail prices. The actors do not share the same information set. Even if policymakers hold aggregates beyond what is publicly released, a third party cannot reproduce the judgment unless definitions, timing, and coverage are disclosed. [6,10,12,13,18,22]

Risk is distributed across actors in the form of price fluctuation, yield, quality, inventory, credit, logistics, unsold goods, and institutional change. Without knowledge of ownership transfer and payment terms, it is not possible to determine who bore gains from price increases or losses from price declines. The relevant question is therefore not simply how high a price was but what contract applied and how long inventory was held. [8,11,12,15,16]

The authority flow includes the power to set contract terms, administer pooled settlements, require reporting, and release or repurchase reserve rice. The actor with authority is not necessarily the actor who bears gains and losses from price movements. Evaluating policy intervention requires separating whom the government asked to act, the node at which volume was injected, and the route by which it was expected to reach consumers. [22,23]

Unlike goods and money, explanations reconstruct the meaning of past events after the fact. Administrative self-review, industry rebuttals, media headlines, and consumer experiences assign different causal candidates to the same events. Returning each explanation to its place in the industry structure distinguishes observed facts from actor interpretation. [22,35,36]

4. Producer Operations, Collection, and Settlement

4.1 Production Costs and Scale

For the 2024 crop, fully imputed production cost per 60 kg by planted-area class was JPY 27,217 for farms below 0.5 ha, JPY 13,749 for 5-10 ha, and JPY 9,978 for 50 ha or more, showing a clear decline in unit cost with scale. Labor time likewise fell from 5.43 hours per 60 kg below 0.5 ha to 1.17 hours at 50 ha or more. These averages, however, smooth over land conditions, region, quality, machinery ownership, off-farm work, and family labor and therefore do not directly show the profitability of an individual farm. [2,3]

The average fully imputed production cost of JPY 15,814 per 60 kg includes JPY 7,601 in costs close to purchased or paid expenses, JPY 3,808 in imputed self-supplied costs centered on family labor, JPY 2,684 in depreciation, JPY 695 in paid interest and rent, and JPY 1,594 in imputed interest on own capital and rent on owned land. Fully imputed production cost is not current-year cash outflow. It is an economic cost that includes family labor, allocation of past investment, and the opportunity cost of own capital and owned land. The difference from a selling price cannot be interpreted directly as cash on hand or household income. [2,3]

For paddy-field farming in 2024, average gross agricultural revenue was JPY 5.279 million, agricultural operating expenses JPY 4.290 million, farm income JPY 0.989 million, and total planted area 312.4 ares. This farm income is neither total household income nor economic profit. Farms for which rice was the largest sales item include principal, semi-principal, supplementary, and corporate operations, and supplementary operations were numerous in the 2025 composition. Continuity cannot be judged from a single income indicator without linking off-farm income, pensions, land assets, family labor, and machinery renewal. [4,5]

Continuity of corporate farms also cannot be judged from operating profit alone. In the audited aggregation of rice-farming corporations, the average operating margin on sales for 2020-2024 was negative, while the ordinary profit margin was positive, indicating a large role for non-operating income. When equity ratios, reliance on borrowing, and capital turnover are considered, producer continuity depends on a combination of rice sales, subsidies and transfers, finance, land, employment, and capital renewal. Combining individual farms and corporations into one average category of 'farmers' conceals differences in cost and risk structure. [4,5]

Scaling up reduces cost and labor time per 60 kg, but expansion cannot continue without limit in every region. Field fragmentation, irrigation arrangements, slopes, farm roads, joint local management, and the availability of operators constrain scale. A statistical finding that small farms have higher costs does not by itself imply that exit is optimal; their roles in resource management, self-provision, and part-time farming require separate evaluation. [2,5]

4.2 Advance Payments, Additional Settlements, and Outright Purchase

The advance payment (gaisankin) is a provisional payment to the producer at shipment, not the final selling price. Under pooled settlement, storage, sales, freight, fees, and other costs are deducted from sales revenue, and an additional payment or final settlement may follow. Regional materials reveal some cost items and settlement structures, but no nationally standardized series was found that links a prefecture-wide pooled settlement through the JA stage to each producer's final receipt. [7,8,9]

The meaning of an advance payment or purchase price differs between consignment sales and outright purchase. Under consignment, sales outcomes and costs are settled later; under purchase,

ownership and price risk transfer to the purchaser. Under direct sales or advance contracts, producers may bear more product-development, sales, and credit risk. Comparing amounts without identifying the contract type places different risk bundles on the same price scale. [8,11]

For the 2025 crop, higher advance payments were widely reported and socially treated as a representative producer price. Yet a higher advance payment does not directly show the increase in the producer's final receipt, the profit of JA or another collector, or its contribution to the retail price. Verification of the final receipt requires an anonymous distribution linking advance payments, additions, deductions, and final totals by region, brand, grade, and contract type. [7,9,35,39]

Table 2. Boundaries of Producer-Operation and Collection-Settlement Indicators

Indicator	What can be observed	What is not directly known
Fully imputed production cost	Economic cost, averages by scale, cost items	Current-year cash flow, household income, individual profitability
Advance payment	Provisional payment at shipment; regional benchmarks	Final receipt, additions and deductions, profit
Pooled-settlement case	Regional examples of sales revenue and costs	National distribution, producer-level take-home receipt
Outright purchase price	Contract price at transfer of ownership	Risk-adjusted comparison with other contracts

5. Inventory, Wholesale, Milling, and Logistics

5.1 Inventory Volume and Ownership

Private inventory statistics show inventory quantities at the collection and sales stages, crop-year composition, and monthly movements. In the audited series, total inventory was 3.40 million tonnes at the end of December 2025 and 1.94 million tonnes at the end of June 2026, respectively 0.87 million and 0.72 million tonnes above the same month a year earlier. Quantity is highly visible, but acquisition price, acquisition month, ownership, sales contract, accounting method, and valuation gain or loss are not published. [12]

A large inventory volume does not directly prove high-cost inventory, withholding of sales, or price manipulation. It can also change because of seasonality, transition to a new crop, slower sales, safety stock, pending contracts, or changes in the reporting population. Conversely, the mechanism by which selling high-cost inventory at a lower price creates losses is economically plausible. Testing its national contribution requires anonymous cohorts linking crop year, acquisition month, price band, quantity, owner, and accounting method. [12,40]

The collection and sales stages in inventory statistics indicate position in the distribution chain, but they do not always identify legal ownership or the actor ultimately bearing price risk. Consigned goods, purchased goods, contracted inventory awaiting sale, and inventory awaiting processing have different economic characteristics. Unless contract status is added to the stage classification, one cannot determine whether inventory can be released to the market or who bears a loss when prices decline. [8,11,12]

5.2 Wholesale Selling Prices and Costs

The survey of rice-selling businesses publishes year-on-year indices for sales volume and selling prices to retail and to prepared-food and food-service buyers. In the audited period, the retail price index was approximately 1.7-1.9 times its year-earlier level in early 2025 and later declined, while

growth for prepared-food and food-service buyers remained high for longer. This shows different movements by use, but it does not provide absolute selling prices in yen per kg, procurement cost, inventory valuation, or profit. An absolute yen level or profit margin cannot be reconstructed from a year-on-year index. [13]

The rice cost indicator provides reference values for cost components across production, collection, wholesale, retail, and other stages. The 2026 all-stage standard value converted to 5 kg of milled rice was approximately JPY 2,816, and the sensitivity value using the observed 88.8% milling yield was approximately JPY 2,854. The indicator is not a transaction price, a particular company's accounting cost, or a fair price. Its difference from POS is an unexplained residual and is not used as a direct estimate of profit. [14,15,17,18]

5.3 Milling, Packaging, and Logistics

Brown rice loses weight during milling, and products differentiate by brand, grade, blend, private label, and package size. The survey of milling businesses shows input volume, product volume, and yield, but does not connect raw-material lots to priced products sold. Packaging materials, milling electricity, equipment, quality control, storage, delivery, returns, and other items are separate costs. [15,17]

In milled-rice logistics, ordering frequency, small-lot high-frequency delivery, pallets and containers, waiting time, joint delivery, and delivery conditions affect both cost and supply stability. Materials on logistics efficiency demonstrate that constraints exist, but no public series connects each product's logistics cost to its retail price. The residual between the negotiated transaction price and POS therefore cannot be treated collectively as the 'share taken by intermediaries.' [16]

Wholesale functions include not only trading margins but also coordination across origin, brand, grade, and use; temporal balancing of supply and demand; quality assurance; milling; inventory; credit; delivery; and avoidance of stockouts. Recognizing these costs and benefits does not unconditionally justify any price or conduct. The existence of a function and whether its cost and profit are reasonable are separate questions; the latter requires absolute prices and accounting links. [13,15,16]

6. Retail, Food Service, and Consumers

6.1 POS, Retail Prices, and CPI

POS data aggregate prices and quantities of products actually sold on a weekly basis and show retail changes quickly. For July 20-26, 2026, the all-product average was JPY 3,311 per 5 kg, branded rice JPY 3,363, and blended rice and other products JPY 3,130. POS is a quantity-weighted average across many products and incorporates changes in brand, crop year, private label, reserve-rice products, promotions, region, and store composition. [18]

The Retail Price Survey uses survey locations and representative products, the Consumer Price Index uses quality adjustment and a base year, and the Household Survey's derived unit price divides household expenditure by purchased quantity. For two-or-more-person households in 2025, rice expenditure of JPY 42,739 and purchases of 61.31 kg imply a derived price of approximately JPY 3,485 per 5 kg. POS differs in population, period, and product composition. The mere similarity or difference of values across series does not determine which is the correct price. [18,19,20,21]

6.2 Retail Price Bridge

Deriving retail profit from the retail price requires product-level procurement prices, standard and transaction prices, discounts, points, the allocation of promotional costs among manufacturers, wholesalers, and retailers, waste, returns, store logistics, gross margin, and selling, general, and administrative expenses. Public POS shows transaction prices but not procurement or costs, while the cost indicator is a reference model rather than product-level accounting. [14,15,18,37]

The difference between the all-POS average of JPY 3,311 and the standard cost indicator of JPY 2,816 is JPY 495; the difference from the observed-yield sensitivity value of JPY 2,854 is approximately JPY 457. These differences may contain not only profit but also product quality and brand, procurement timing, inventory valuation, promotions, logistics, and store operating costs. They are therefore not called 'retail profit' or a 'fair margin.' Different residuals for branded and blended rice also indicate the influence of product composition. [14,15,18]

Retail prices do not immediately follow upstream prices while the same procured inventory remains unsold. Standard prices, promotional prices, point rebates, advertised products, private-label products, and reserve-rice products coexist, and the funding of a price reduction may be shared by wholesalers, retailers, or other products. POS transaction prices are useful for measuring consumer burden, but they do not alone reveal the price-setting process or profit allocation. [18,37]

In food service and prepared foods, rice is one input into a final dish, and the share of rice cost in the final selling price differs by product. Even if the wholesale price index for prepared-food and food-service buyers moves differently from that for retail buyers, the effect on dish prices or business profit cannot be derived directly. Data separating raw rice, yield, cooking, waste, labor, and store costs are required. [13]

6.3 Household Burden

For two-or-more-person households in 2025, rice expenditure was approximately 3.75% of food expenditure and 1.13% of total consumption expenditure. These annual shares may appear small, but purchases create concentrated outlays for 5 kg or 10 kg at a time. An average that omits income, single-person and older households, purchase frequency, expenditure per purchase, and substitution toward food service or prepared foods cannot adequately evaluate perceived burden or effects on vulnerable households. [19,36]

Consumers observe the retail price, but not the advance payment, final settlement, inventory book value, wholesale price, or promotional cost allocation behind it. At the Food Committee, participants described feeling 'left behind' because they did not understand why prices rose or how rice moved through distribution. This statement is consistent with discontinuity in the price bridge, but the study does not establish that inadequate transparency causally produced distrust. [36]

7. Integrated Price Bridge and Six Flows

Listing prices from upstream to downstream produces the following values: production cost JPY 15,814 per 60 kg of brown rice; negotiated transaction price JPY 31,305 per 60 kg of brown rice, including tax; an equivalent of approximately JPY 2,938 per 5 kg of milled rice; and POS JPY 3,311 per 5 kg of milled rice, including tax. These are not continuous values for the same contract, lot, product, and time. Production cost is the 2024 crop average, the negotiated price is for June 2026, and POS is the July 2026 all-product average. Sequential subtraction does not produce a single profit-and-loss statement. [2,6,18]

The first break in public information is the producer's final receipt. Advance payments can be observed regionally, and examples of pooled settlement show cost items, but advance payments, additions, deductions, and final totals cannot be linked nationally with contract type. The second break is inventory acquisition cost. Inventory volume is known, but the actor, price, date of acquisition, and accounting method are not. [7,9,12]

The third break is the absolute wholesale selling price. Major public series are year-on-year indices and do not connect a yen price to procurement, processing, logistics, or valuation gain or loss. The fourth break is product-level retail procurement, costs, and profits. POS shows transaction prices but not procurement, promotion, waste, store costs, or profit. Because these four points are disconnected, stage differences cannot be converted into profit, profiteering, or the contribution of a single actor. [13,14,15,18,37]

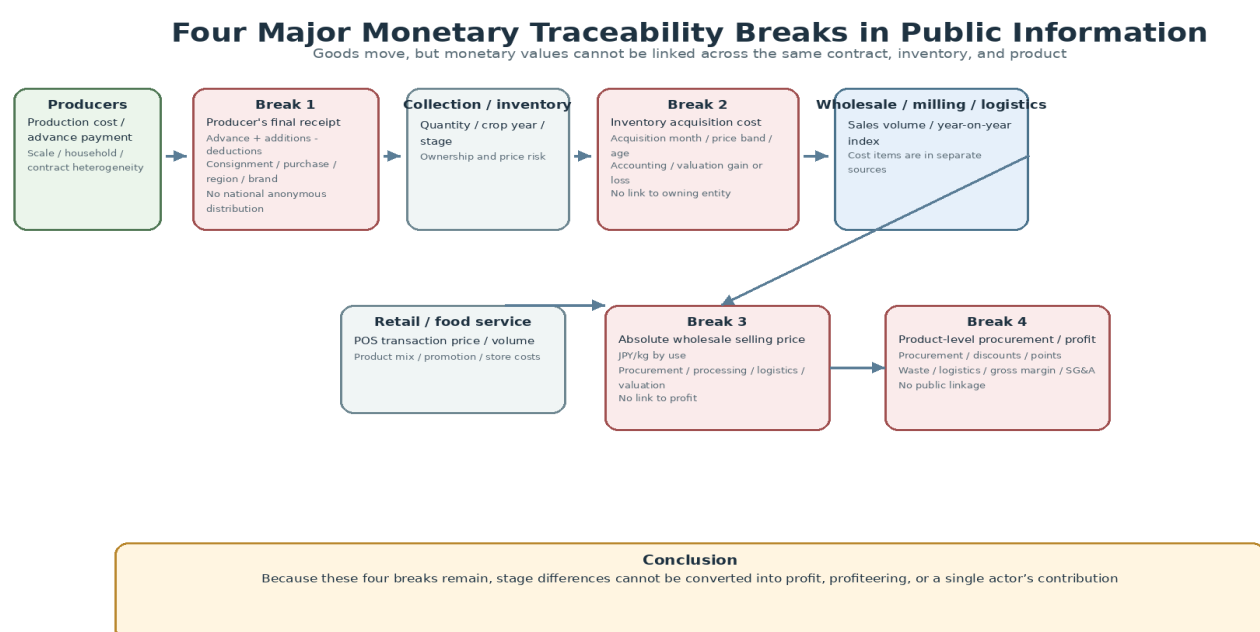


Figure 3. Four Major Price Breaks in Public Information

Source and note: Prepared by the author, based on references [7,9,12-15,18] and the RUN07 integrated audit.

Table 3. Four Price Breaks and the Misinterpretations They Invite

Break	Visible information	Missing connection	Misleading conclusion invited
Producer's final receipt	Advance payments, regional settlement cases	Additions, deductions, final total by contract	Advance payment = producer price
Inventory acquisition cost	Inventory by stage, crop year	Acquisition month, price band, ownership, valuation gain/loss	More inventory = withholding / high-cost inventory value
Absolute wholesale price	Sales volume, year-on-year price index	Yen price, procurement, costs, valuation gain/loss	Difference from negotiated price = wholesale profit
Product-level retail profit	POS transaction prices, retail prices, reference costs	Procurement, promotion, waste, SG&A, profit	Retail residual = retail profit

Note: A break does not mean that information does not exist; it means that public information cannot be connected under the same conditions.

From the perspective of the six flows, quantities are relatively continuous, while money and risk are most prone to disconnection. Information is dispersed across statistical systems; authority is embedded in contracts and policy; and explanations are issued from the position of each actor.

Transparency cannot therefore be improved merely by publishing one additional price. The design must connect price stage, contract, ownership, product, and time.

A price bridge has two uses. The first is to connect segments for which the same conditions are available. The second is to diagnose which information is missing where conditions do not align. The all-stage bridge in this study serves the second purpose; it does not reduce the total to a single price-formation equation. A blank that cannot be filled with a number is not a failure but a boundary in the design of public information.

For the same reason, the study does not assume that shortening distribution automatically transfers the eliminated difference to consumers or producers. Under direct sales, the costs of intermediate functions do not disappear; producers or sales platforms perform selection, packaging, inventory, credit, delivery, and customer service. A shorter route is not synonymous with lower total cost; the result depends on volume, frequency, and service level. [1,16]

8. Institutions, Administrative Judgment, and Reserve Rice

8.1 Demand Forecasting and the Initial Response

According to the government's subsequent review, demand projections were based on the prior declining trend and did not adequately capture lower milling yields, inbound tourism, changes in household purchasing, and other demand shifts. The review also identified problems in understanding distribution conditions, dialogue with market participants, and decisions on releasing reserve rice. The material therefore records an official acknowledgement that the price surge could not be explained by one supply-demand number alone. [22]

In January 2025, rice-industry associations reported a decline in volumes offered for sale, concerns about scarcity and stockouts, and requested use of reserve rice and improved public communication. In the initial phase, problems of collection, offered sales volumes, and distribution time were recognized in addition to physical production volume. Public sources, however, do not allow the contribution of each factor to be decomposed. [34]

8.2 From Conditional Auctions to Negotiated Direct Contracts

Under the conditional competitive auctions for government reserve rice, 141,796 tonnes were awarded in the first round, 70,336 tonnes in the second, and 100,164 tonnes in the third, for a cumulative 312,296 tonnes. Average successful bid prices declined across rounds. This was a policy output that transferred physical volume from government stocks to market actors, but the time required to reach retail, retail sales volume, and pure price effect were separate questions at the time of auction. [24,25,26]

The May policy package judged that retail distribution remained limited and price transmission slow after the auctions, and changed the instrument to negotiated direct contracts with retailers, specialty rice shops, and prepared-food and food-service users closer to the downstream market. This can be interpreted as policy adaptation to a mismatch between the intervention node and the retail transmission route, without fixing the internal political and operational causes as a single explanation. [23]

Final materials on the direct contracts reported retailer purchases of 268,615 tonnes and actual sales of 237,800 tonnes, together with purchases of 10,894 tonnes and use of 10,019 tonnes by prepared-food and food-service businesses. The difference between retailers' average purchase

price of JPY 10,638 per 60 kg excluding tax and average selling price of JPY 22,681 per 60 kg excluding tax includes milling, packaging, logistics, store costs, unsold inventory, and other items and cannot be interpreted as profit. [27,28]

The auctions and direct contracts differed in eligible actors, pricing, repurchase conditions, and supply routes, so their performance cannot be ranked by a simple unit-price comparison. Auctions can inject large volumes rapidly into existing distribution; direct contracts can connect government supply to actors closer to retail. Policy evaluation should separately measure procurement and contract completion, distribution time, actual sales, prices of covered products, and spillovers to other products. [23,24,25,26,27,28]

8.3 Self-Review, Legal Reform, and Effectiveness

After the official review, policy moved toward supply-demand monitoring for both brown and milled rice, forecasts reflecting yields and recent demand, reporting that included processing and prepared-food and food-service sectors, periodic monitoring of inventory, procurement, sales, prices, and milling, and reconsideration of the purposes of government and private reserves. The policy process can be reconstructed as routine monitoring, auctions, direct contracts, self-review, and institutional redesign. [22,29,30,31]

Submission of a bill, passage, promulgation, enforcement, operational implementation, and effectiveness are nevertheless different states. Even after amended legislation is enacted, one cannot assess how far the four price breaks have closed without information on covered businesses, thresholds, response rate, coverage, reporting delay, publication granularity, and nonresponse. The paper separates progress in institutional design from completion of the transparency problem. [31,32]

Price formation that considers reasonable costs under the Food System Act is a framework in which transaction parties consider costs; it does not automatically establish an administered price, guarantee profit, or certify that a specific price is fair. This paper addresses observation and traceability of prices and does not make a normative judgment about the correct price in yen. [33]

Rebuilding government reserves is also a decision that must address food security and market effects simultaneously. Faster restoration to the target stock increases the security buffer, but government purchases may affect market supply, demand, and prices. Repurchase volume, timing, upper limits, and stopping conditions should be announced in advance and audited separately from post-implementation market indicators, for both releases and rebuilding. [30,32]

Policy Decisions from the 2025 Rice-Price Response to 2026 Institutional Reform

Intervention shifted from upstream auctions to downstream contracts, while post hoc review moved toward permanent systems

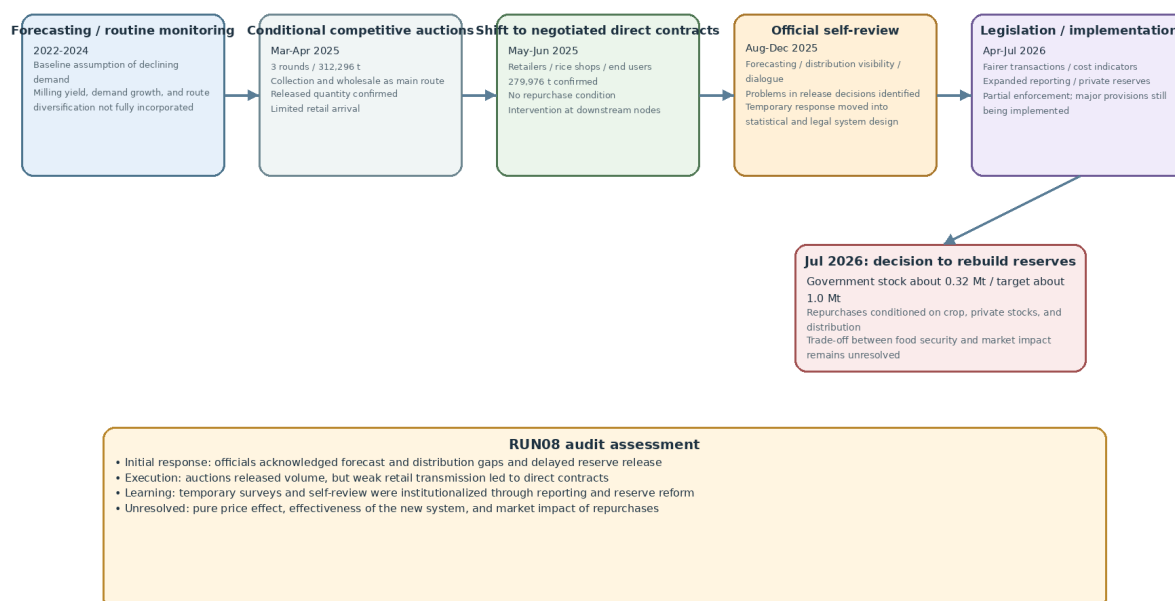


Figure 4. Policy-Decision Timeline, 2025-2026

Source and note: Prepared by the author. References [22-32].

Table 4. Separation of Policy Output, Transmission, Effect, and Implementation Status

Phase	Instrument or output	What can be confirmed	Unidentified or unresolved
Initial recognition	Supply-demand monitoring, industry requests	Scarcity and offered-volume concerns, official recognition	Contribution of each factor
Auctions	Three rounds; 312,296 tonnes awarded	Physical transfer from government stocks	Time to retail, pure price effect
Direct contracts	Direct supply to retailers and others; sales and use results	Purchase, sales, and use quantities	Cost-profit decomposition of price differences
Self-review	Review of forecasting, information, and judgment problems	Record of self-review and institutional change	Optimal counterfactual decision
Institutional redesign	Reporting, reserves, and price-formation legislation	Legal status and design	Response rate, coverage, effectiveness

9. Actor Explanations and Media Frames

9.1 What Each Actor Foregrounds

Producers discuss long periods of low prices, production costs, machinery, labor, farm exit, and succession. JA explains that advance payments are provisional and discusses competition with private collectors, consignment settlement, freight, and storage charges. Wholesalers discuss offered sales volumes, stable supply, inventory, milling, and logistics. Retailers describe being squeezed between procurement, labor, and store costs and the difficulty of passing costs through. Government discusses supply and demand, reserves, distribution facilitation, self-review, and institutional redesign, while consumers discuss retail prices, household burden, and lack of information. Each explanation describes a real constraint but does not fill the unobserved information at adjacent stages. [34,35,36,37]

JA's explanation treats the advance payment as a temporary payment and states that the remaining sales proceeds are settled with producers after costs are deducted. Some commentary treated the advance payment as the central mechanism fixing prices at a high level. The important point in comparing these accounts is that the same term, advance payment, appears in different contexts: provisional payment, competition for collection, price expectations, and final settlement. Without national linkage of final producer receipts, neither competing explanation fully shows producers' final take-home amount. [7,9,35]

9.2 Shifts in Media Framing

Across 26 purposively sampled actor statements, news reports, and commentaries, the central frame shifted from shortage and stalled distribution in early 2025, to record prices and policy outputs in spring, political drama, culprit-seeking, and the 'black box' in May-June, advance payments and agricultural continuity in autumn, high-cost inventory at year-end, and loss cutting and price decline in summer 2026. This describes the sampled corpus and does not measure frequency or bias across all Japanese reporting. [34,35,38,39,40]

Terms such as 'culprit,' 'mastermind,' and 'black box' compress a complex network into a short question. Some articles with strong headlines nevertheless placed producers, JA, private collectors, wholesalers, retailers, government, and consumers together in the body. Collecting headlines alone can underestimate the structural completeness of an article, so the audit distinguishes full-text review, headline-and-summary only, and video title only. [38,39]

The explanation of high-cost inventory reversed across market phases: during sustained high prices it was presented as a reason prices could not be cut, while during price decline it became an explanation for wholesale losses and loss cutting. This shows how the same economic mechanism can generate gains or losses in opposite directions depending on market conditions, but individual company cases cannot be generalized nationally. Without acquisition-cost cohorts, the scale of the reported mechanism cannot be quantified. [40]

Repeated frames are not evidence that industry, government, and media conspired to control a narrative. Similar frames can arise independently from the same statistical releases, press conferences, events, available interview subjects, and visually simple story lines. Public materials simultaneously contained conflicting explanations, including claims that JA caused the problem and JA rebuttals, suspicions of wholesale profit and reports of wholesale losses, and government supply explanations alongside official self-review. [22,35,38,39,40]

Actor explanations and reporting are indispensable to understanding the industry, but they are a different form of evidence from statistics. Individual producer or wholesaler cases reveal mechanisms of contract, emotion, and profit or loss that averages omit, but they are not nationally representative. Official statistics show a national picture but lose the history of individual cohorts. Rather than treating the two as competing sources, the distribution shown by statistics and the mechanisms shown by cases should be connected as separate layers. [38,39,40]

Shifts in Rice-Price Media Frames and Actor Explanations

The same industry structure is framed as different causal stories across phases

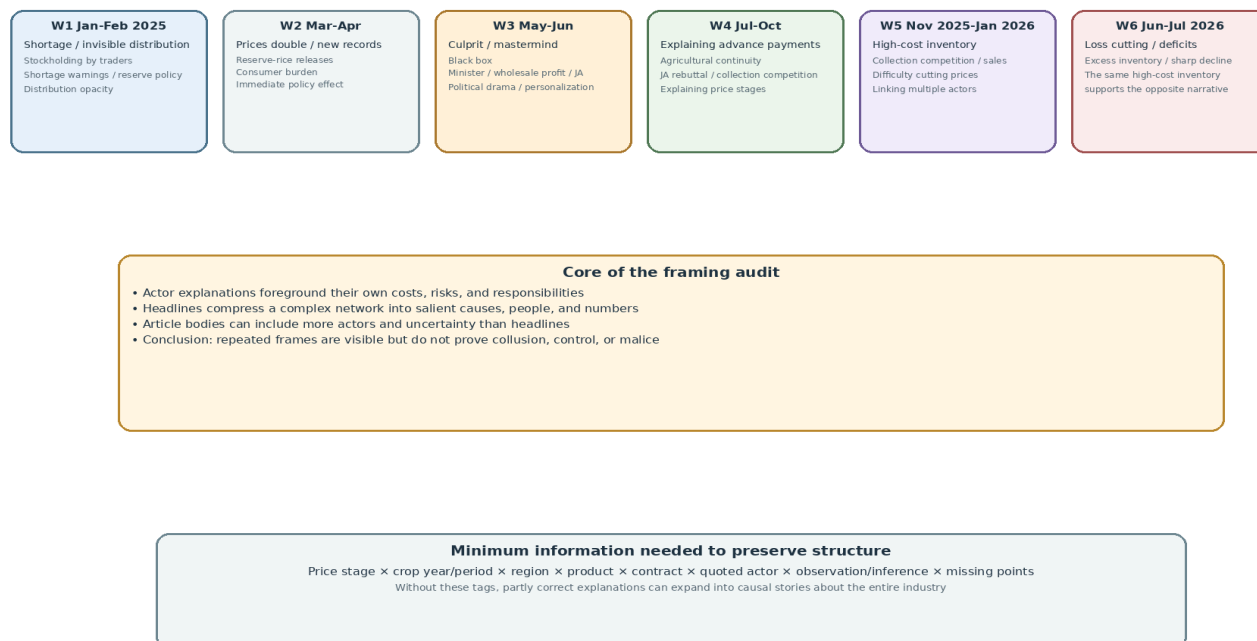


Figure 5. Changes over Time in Actor Explanations and Media Frames

Source and note: Prepared by the author. References [34-40] and the RUN09 corpus.

10. Structural Problems and Improvement Roadmap

The problems identified by the audit can be organized into five layers: definitions and measurement, price bridges, ownership and risk, institutional judgment, and public explanation. Inconsistent definitions prevent price bridges from connecting; absent contracts and ownership information prevent inventory risk from being understood; and where price bridges remain broken, policy effects and actor explanations cannot be verified.

10.1 Layer 1: Immediate Standardization

The first layer is minimum common metadata identifying price stage, contract type, crop year, product form, unit, tax, freight, region, period, observation versus inference, and unobserved points. It includes a measurement-series crosswalk that defines POS, retail prices, CPI, household data, negotiated prices, and cost indicators on the same screen; version control for demand forecasts; policy decision logs; and an implementation dashboard. These measures are relatively low cost and form the precondition for later data linkage.

10.2 Layer 2: Anonymous Pilots

The second layer experimentally connects the four price breaks through anonymous distributions. For the producer's final receipt, advance payments, additions, deductions, and final totals would be aggregated with contract type. Inventory cohorts would aggregate crop year, acquisition month, price band, quantity, owner, accounting method, and valuation gain or loss. Wholesale and retail would report yen selling prices, procurement, processing and logistics, promotions, waste, and SG&A as separate fields. Before national mandates, pilots should measure coverage, residuals, response burden, small-cell problems, and re-identification risk.

10.3 Layers 3 and 4: Integrated Infrastructure and Research Extensions

The third layer is an integrated dashboard that places existing statistics at the same nodes of the six flows and an infrastructure that connects crop year, acquisition month, product attributes, contract, owner, and price stage as anonymous cohorts. This could make lags in price transmission and transfers of risk testable, but it carries the greatest burdens of cost, confidentiality, access rights, and data quality. Combining large datasets before Layers 1 and 2 are complete could increase comparisons that appear precise but are conceptually false.

The fourth layer is a research extension: a representative census-style media corpus, video transcripts, and tests of effects on audience understanding, trust, and attribution of responsibility. The purposive RUN09 sample is useful for identifying questions but is separated from the evidentiary basis for representative institutional recommendations.

These improvement options are neither a unique policy solution nor a formal cost-benefit analysis. More transparency is not always better. Disclosure that allows individual contracts to be inferred can distort competition, while excessive reporting obligations can burden small businesses. Price-band aggregation, suppression of small cells, delayed publication, third-party aggregation, sampling, and phased introduction must be designed together.

Evaluation metrics should include not the number of published items but the coverage of connectable transactions and quantities, unexplained residuals, response rates, publication delay, correction rates, reporting time, numbers of suppressed small cells, and re-identification risk. Making transparency policy itself auditable can prevent a system from publishing more information that remains incomparable or from excluding only small actors.

Implementation also has multiple actors. Government sets definitions, reporting, and legal status; industry standardizes contract, product, and cost codes; statistical agencies design samples and confidentiality; and independent researchers evaluate institutional effects and audience understanding. Dividing roles avoids the false choice between government publication of individual profits and preservation of the status quo.

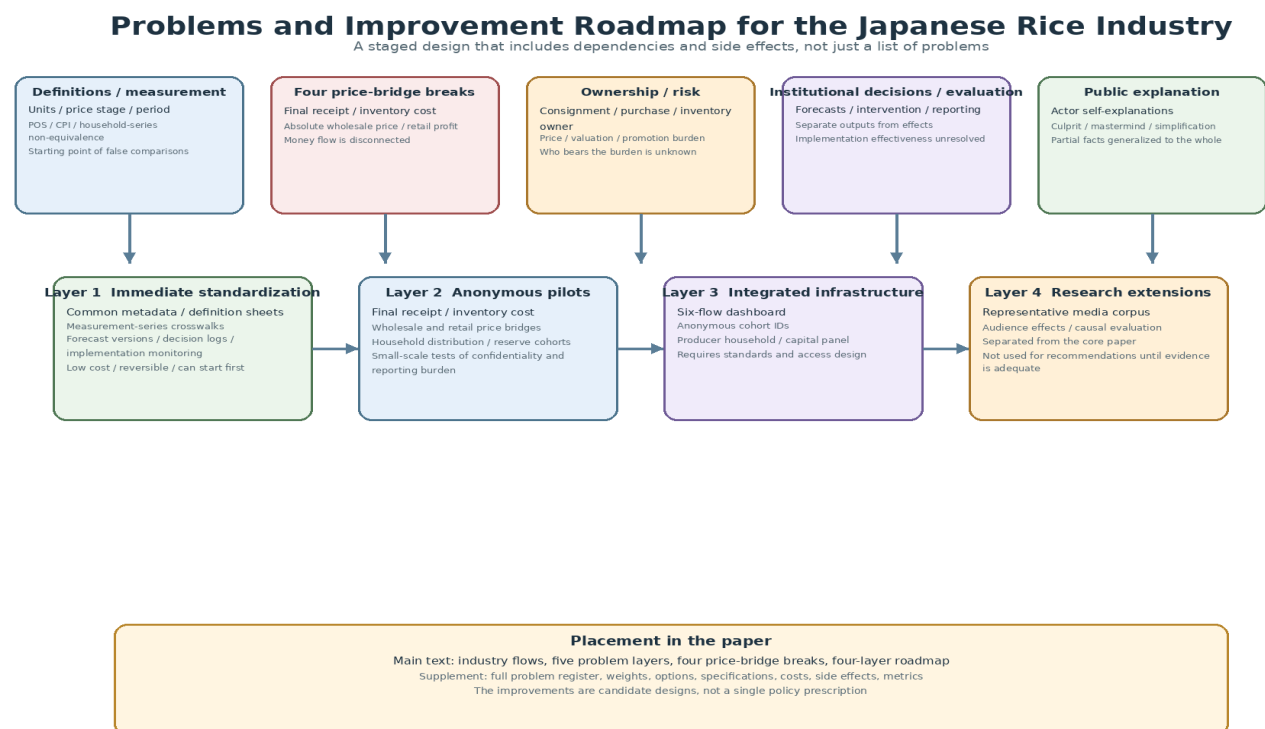


Figure 6. Five Problem Layers and Four-Layer Improvement Roadmap

Source and note: Prepared by the author. RUN10 integrated evaluation. Scores are not a formal cost-benefit Analysis.

11. Limitations, Alternative Explanations, and Falsifiability

11.1 Limits of the Public-Information Audit

First, the study covers public information and does not audit internal corporate or government contracts, accounting, inventory management, or decision records. Inability to connect information publicly does not imply that it cannot be connected internally. Second, because price-series timing and products do not match, the numerical price-bridge example is not a profit or loss for the same cohort. Third, coverage of small-scale, direct-sales, and multi-format routes; burden by household income; and farm household assets and liabilities is limited.

Fourth, public materials include preliminary, final, corrected, and revised values that may change later. The study fixes acquisition dates and file hashes, but does not treat the latest value at submission as a permanent truth. Fifth, derived conversions align units; they do not remove differences in quality, contract, or timing. Even after yield sensitivity, tax, and package size are stated, limits on economic comparison remain.

Sixth, the pure effect of policy requires a counterfactual. A price change after a reserve release does not identify a causal effect unless seasonality, the new crop, demand, inventory, competition, other policies, and product composition can be removed. Seventh, the actor-explanation and media analysis is purposively sampled and does not estimate population-wide frequency, bias, or audience effects.

11.2 Alternative Explanations

Public information may be discontinuous not only because of intentional opacity but also because of decentralized market transactions, differences in statistical purpose, product transformation, contract confidentiality, accounting, and reporting burden. Rising prices may reflect coexisting influences from production volume, forecasting error, milling yield, demand growth, competition for collection, inventory, logistics, policy judgment, and product composition. Current materials are insufficient to reduce these to one contribution rate. [10,12,16,22]

The residual between negotiated price and POS may include quality, milling, packaging, logistics, store costs, promotion, inventory valuation, and timing. Inventory growth may reflect seasonality, slower sales, safety stock, or transition between crop years. Omissions in actor explanations may arise from deception, but also from organizational remit, space limits, available data, or confidentiality. Retaining alternatives does not treat all explanations as equally correct; it identifies which additional evidence would distinguish them.

11.3 Falsification and Update Conditions

If national or representative-sample data were published that continuously linked producer receipts to retail accounts while preserving contract type, ownership, and product attributes, the four breaks would close or narrow. If procurement, processing, logistics, promotion, inventory valuation, SG&A, sales, and profit were connected for the same product and period, the conclusion that profit is unidentified would be replaced by direct testing.

If a counterfactual evaluation of reserve rice using a valid comparison group or structural model were published, the unidentified pure effect could be updated to an effect size with uncertainty. Accumulated information on reporting-system coverage, response rates, delays, and publication granularity would permit quantitative evaluation of institutional effectiveness. If the RUN09 shifts

were not reproduced in a representative media corpus, the conclusion would be narrowed to a description specific to the purposive sample.

Stating falsification conditions does not weaken the conclusions. Non-traceability in this study is not a permanent proposition; it is a finding about public information at the audit cutoff. Updating a conclusion from 'unobserved' to 'observable' when new systems and materials close a break is consistent with the purpose of the audit.

Table 5. Boundary between Final Conclusions and Non-Claims

Category	What this study concludes	What it does not conclude
Industry structure	A network of multiple actors, contracts, and series	Control by a single organization
Traceability	Four major monetary breaks	That internal information also does not exist
Profit	Cannot be calculated from stage differences alone	Existence or absence of profit; profiteering
Policy	Changes in instruments, self-review and institutional reform, pure effect unidentified	One-word success/failure judgment; a specific effect amount
Explanation	Foregrounding and frame changes within sampled materials	Generalization to all actors or all media; collusion
Normative judgment	Description of costs, prices, and burdens	Fair or unfair price

12. Conclusion

The Japanese rice industry is not a single price chain but a network in which producer types, contract forms, ownership, inventory, processing, products, sales routes, policy, and measurement series overlap. Public information makes quantities and stage-level averages substantially visible, but monetary values cannot be traced continuously as the same contract, inventory, and product.

The principal monetary breaks concern the producer's final receipt, inventory acquisition cost, absolute wholesale selling prices in yen, and product-level retail procurement, costs, and profits. Because these four points are disconnected, differences among negotiated prices, cost indicators, POS data, and other series cannot by themselves be used to calculate wholesale or retail profit, profiteering, or the contribution of a single actor. A claim that cannot be established from public information must not be converted into a claim that the phenomenon does not exist.

Since 2025, the administrative response has shifted from conditional auctions to downstream direct contracts, official self-review, and redesign of statistical and legal systems. This is consistent with policy adaptation and institutional learning, while the pure causal effect of reserve-rice releases on retail prices and the extent to which the new reporting system closes the price bridge remain unresolved.

The first step toward better transparency is not full publication of every transaction but presentation of price stage, contract, product, time, ownership, observation, and inference in a common format. The four price breaks should then be piloted through anonymous distributions, with benefits, residuals, reporting burden, and confidentiality risk measured. A six-flow dashboard and anonymous cohort infrastructure can be considered afterward. This sequence is a candidate design, not a unique policy solution.

The contribution of the study is not to determine the culprit behind rising rice prices or the correct price. It reconstructs the structure from producers to consumers and shows what is visible, where connection fails, and which additional information would change the conclusions. The final purpose of the audit is to leave a map that third parties can verify while keeping understanding of industry conditions separate from unconditional justification of individual conduct.

Declarations

Ethics

This study uses only public materials and includes no intervention involving human participants, collection of personally identifying information, or animal experimentation.

Data and Reproducibility Materials

Derived tables, definition contracts, claim registers, manifests, SHA-256 records, and source URLs and acquisition information are provided as Supplement-1_PDF, Supplement-2_XLSX, Supplement-3_ZIP, which is the machine-readable audit-data and provenance archive, and Supplement-4_PDF. Original PDFs created by third parties are not included in the public archive unless redistribution permission is confirmed.

AI Use Disclosure

OpenAI ChatGPT was used as an AI-assisted research and writing tool for source organization, analytical workflow support, code drafting, cross-source synthesis, and manuscript drafting and revision. AI-generated output was not treated as evidentiary material; scientific claims are grounded in the cited public sources, archived calculations, and audit records. The author directed the scope and claim boundaries, reviewed and approved the final manuscript, and remains responsible for its content.

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