

Global Shoyu Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Shoyu market size is expected to reach \$ 4814 million by 2032, rising at a market growth of 4.4% CAGR during the forecast period (2026-2032).

Japanese-style soy sauce is a Japanese-style fermented seasoning made from soybeans, wheat, salt, and water as basic raw materials through processes such as koji making, brine fermentation, pressing, pasteurization, filtration, and aging. Its fundamental differences from ordinary Chinese soy sauce, Korean ganjang, and Southeast Asian sweet soy sauce lie in the fact that its raw material ratio, fermentation microorganisms, aroma structure, color control, saltiness balance, and usage scenarios are all built around the Japanese culinary system. Typical Japanese-style soy sauce emphasizes a balance of saltiness, umami, slight sweetness, acidity, bitterness, and fermented aroma. It can be used directly as a dipping sauce for sushi, sashimi, cold tofu, and grilled dishes, and can also be used for simmered dishes, teriyaki, soup bases, pickling, and compound seasoning sauces. According to the Japanese Agricultural Standards, or JAS, Japanese-style soy sauce is mainly divided into five types: koikuchi soy sauce, usukuchi soy sauce, tamari soy sauce, saishikomi soy sauce, and shiro soy sauce. Among them, koikuchi soy sauce is the most common basic type, usukuchi soy sauce places greater emphasis on light-colored seasoning, tamari soy sauce highlights a stronger soybean aroma and richer mouthfeel, saishikomi soy sauce is mostly used for dipping and high-end seasoning, and shiro soy sauce is suitable for dashi and light dishes that need to preserve the original color of the ingredients.

Japanese-style soy sauce is a niche flavor product in the Chinese market, shaped around Japanese cuisine, Asian fusion dining, and mid- to high-end household seasoning needs. It provides users with umami, aroma, color, and a savory-salty

balance that are closer to the Japanese culinary system, and mainly serves usage scenarios such as sushi, sashimi, ramen, teriyaki, grilled dishes, sukiyaki, cold tofu, Japanese-style rice bowls, prepared Japanese meals, and compound seasoning sauces. China has a large basic soy sauce consumption market, and soy sauce remains one of the core categories in the condiment sector. In the first quarter of 2025, soy sauce accounted for a relatively high share of China's condiment category, while low-salt, low-sodium, and health-oriented soy sauce continued to be regarded as important growth directions. However, the growth logic of Japanese-style soy sauce differs from that of ordinary soy sauce. It depends more on the penetration of Japanese restaurants, the standardization of chain restaurants, imported food retailing, membership-based supermarkets, cross-border e-commerce, and young consumers' growing awareness of Japanese flavors. China was long one of the largest overseas markets for Japanese restaurants. In 2023, there were approximately 99,500 Japanese restaurants in China. Although the number has declined in recent years due to the economic environment and adjustments in the catering structure, the large existing restaurant base still forms the main demand foundation for Japanese-style soy sauce in the Chinese market.

The upstream supply chain of Japanese-style soy sauce in China mainly includes soybeans, defatted soybeans, wheat, salt, koji cultures, yeast, lactic acid bacteria, food additives, packaging materials, and cold-chain or ambient warehousing and logistics systems. The downstream market is concentrated in Japanese restaurants, sushi chains, ramen chains, bakery and convenience-store fresh food, central kitchens, prepared food companies, high-end retail, and household cooking. Compared with the Japanese domestic market, the Chinese market is characterized by more scenario-based demand, more segmented channels, and a wider price range. Imported Japanese-style soy sauce usually plays the role of brand endorsement and high-end consumption, while localized Japanese-style soy sauce provides cost-effective supply and bulk usage for foodservice channels. Prices of upstream soybeans and wheat, packaging costs, exchange rates, import duties, and international logistics all affect the price of imported products. Chinese domestic companies with fermentation production capabilities, seasoning R&D capabilities, and foodservice customer development capabilities can reduce costs and strengthen supply stability through local production. In terms of policy, China's Food Safety Law, national food safety standards, imported food supervision, allergen and labeling requirements, and the trend toward salt reduction and healthy consumption will all affect formula labeling, customs clearance, channel access, and product promotion for Japanese-style soy sauce in China. On the Japanese side, agricultural, forestry, fishery, and food export policies, together with overseas promotion of Japanese cuisine, will continue to improve category awareness of Shoyu. At the

same time, China's regulation of Japanese food imports and changes in consumer confidence will also encourage companies to place greater emphasis on localized production, transparent labeling, and stable supply.

In the future, Japanese-style soy sauce and sushi soy sauce used by mass-market restaurants will be affected by local substitutes, foodservice cost control, and platform channel competition, leaving limited room for price increases. By contrast, products such as original Japanese imports, naturally brewed soy sauce, organic soy sauce, low-salt soy sauce, gluten-free soy sauce, wooden-barrel fermented soy sauce, saishikomi soy sauce, white soy sauce, and sashimi-specific soy sauce will still have stronger premium potential. These products mainly target high-end Japanese restaurants, premium supermarkets, and household consumers who value flavor authenticity. In terms of output, the Chinese market will not mainly rely on growth in Japanese exports, but will instead form a structure in which imported brands maintain high-end recognition, local production expands mid-range supply, and foodservice customization drives bulk consumption. According to data compiled by Japan's Ministry of Agriculture, Forestry and Fisheries based on Ministry of Finance trade statistics, Japan's soy sauce exports reached JPY 13.88 billion in 2025, up 15.4% year on year. However, the main export destinations were Hong Kong, the United States, Singapore, Taiwan, and Thailand, while mainland China did not appear among the top five. This suggests that demand for Japanese-style soy sauce in mainland China may be met more through local sales systems, Hong Kong and Macau re-exports, cross-border channels, and localized production, rather than being determined entirely by direct exports from Japan. Therefore, Japanese-style soy sauce in China is unlikely to become a mass-market low-price soy sauce category, but it will benefit from the chain development of Japanese restaurants, diversification of household cooking, rising acceptance of Japanese flavors among younger consumers, and health-oriented trends such as low salt, organic products, and clean labels. It is expected to gradually evolve from a niche imported condiment into a growing specialty category with stable foodservice demand and mid- to high-end retail demand.

This report studies the global Shoyu production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Shoyu and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Shoyu that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Shoyu total production and demand, 2021-2032, (Million Liters)

Global Shoyu total production value, 2021-2032, (USD Million)

Global Shoyu production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Million Liters), (based on production site)

Global Shoyu consumption by region & country, CAGR, 2021-2032 & (Million Liters)

U.S. VS China: Shoyu domestic production, consumption, key domestic manufacturers and share

Global Shoyu production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Million Liters)

Global Shoyu production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Million Liters)

Global Shoyu production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Million Liters)

This report profiles key players in the global Shoyu market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Kikkoman, Yamasa, San-J, Aloha Shoyu, Chiba Shoyu, Fundokin Shoyu, Shoda Shoyu, Kamada Soy Sauce, Higashimaru Shoyu, Takesan, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Shoyu market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Million Liters) and average price (US\$/Liter) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Shoyu Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Shoyu Market, Segmentation by Type:

Koikuchi Shoyu

Usukuchi Shoyu

Tamari Shoyu

Saishikomi Shoyu

Shiro Shoyu

Global Shoyu Market, Segmentation by Production Method:

Honjozo Soy Sauce

Mixed-Brewed Soy Sauce

Formulated Soy Sauce

Global Shoyu Market, Segmentation by Flavor Positioning:

Standard Umami-Salty Profile Shoyu

Light-Colored Delicate Profile Shoyu

Rich Aromatic Profile Shoyu

Other

Global Shoyu Market, Segmentation by Application:

Foodservice Kitchen Seasoning Use

Food Industrial Processing Use

Premium Gift and High-End Consumer Use

Others

Companies Profiled:

Kikkoman

Yamasa

San-J

Aloha Shoyu

Chiba Shoyu

Fundokin Shoyu

Shoda Shoyu

Kamada Soy Sauce

Higashimaru Shoyu

Takesan

Lee Kum Kee

Amoy Food

Kimlan Foods

Wan Ja Shan

Sempio

Danyang Yihe Food

Pearl River Bridge

Key Questions Answered:

1. How big is the global Shoyu market?
2. What is the demand of the global Shoyu market?
3. What is the year over year growth of the global Shoyu market?
4. What is the production and production value of the global Shoyu market?
5. Who are the key producers in the global Shoyu market?
6. What are the growth factors driving the market demand?

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