

Global Shoyu Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Shoyu market size was valued at US\$ 3550 million in 2025 and is forecast to a readjusted size of US\$ 4814 million by 2032 with a CAGR of 4.4% during review period.

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 is a detailed and comprehensive analysis for global Shoyu market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Shoyu market size and forecasts, in consumption value (\$ Million), sales quantity (Million Liters), and average selling prices (US\$/Liter), 2021-2032

Global Shoyu market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Million Liters), and average selling prices (US\$/Liter), 2021-2032

Global Shoyu market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Million Liters), and average selling prices (US\$/Liter), 2021-2032

Global Shoyu market shares of main players, shipments in revenue (\$ Million), sales quantity (Million Liters), and ASP (US\$/Liter), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Shoyu

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Shoyu market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

Shoyu market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Koikuchi Shoyu

Usukuchi Shoyu

Tamari Shoyu

Saishikomi Shoyu

Shiro Shoyu

Market segment by Production Method

Honjozo Soy Sauce

Mixed-Brewed Soy Sauce

Formulated Soy Sauce

Market segment by Flavor Positioning

Standard Umami-Salty Profile Shoyu

Light-Colored Delicate Profile Shoyu

Rich Aromatic Profile Shoyu

Other

Market segment by Application

Foodservice Kitchen Seasoning Use

Food Industrial Processing Use

Premium Gift and High-End Consumer Use

Others

Major players covered

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

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Shoyu product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Shoyu, with price, sales quantity, revenue, and global market share of Shoyu from 2021 to 2026.

Chapter 3, the Shoyu competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Shoyu breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales

quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Shoyu market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Shoyu.

Chapter 14 and 15, to describe Shoyu sales channel, distributors, customers, research findings and conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Shoyu Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Koikuchi Shoyu

1.3.3 Usukuchi Shoyu

1.3.4 Tamari Shoyu

1.3.5 Saishikomi Shoyu

1.3.6 Shiro Shoyu

1.4 Market Analysis by Production Method

1.4.1 Overview: Global Shoyu Consumption Value by Production Method: 2021 Versus 2025 Versus 2032

1.4.2 Honjozo Soy Sauce

1.4.3 Mixed-Brewed Soy Sauce

1.4.4 Formulated Soy Sauce

1.5 Market Analysis by Flavor Positioning

1.5.1 Overview: Global Shoyu Consumption Value by Flavor Positioning: 2021 Versus 2025 Versus 2032

1.5.2 Standard Umami-Salty Profile Shoyu

1.5.3 Light-Colored Delicate Profile Shoyu

1.5.4 Rich Aromatic Profile Shoyu

1.5.5 Other

1.6 Market Analysis by Application

1.6.1 Overview: Global Shoyu Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.6.2 Foodservice Kitchen Seasoning Use

1.6.3 Food Industrial Processing Use

1.6.4 Premium Gift and High-End Consumer Use

1.6.5 Others

1.7 Global Shoyu Market Size & Forecast

1.7.1 Global Shoyu Consumption Value (2021 & 2025 & 2032)

1.7.2 Global Shoyu Sales Quantity (2021-2032)

1.7.3 Global Shoyu Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Kikkoman

2.1.1 Kikkoman Details

2.1.2 Kikkoman Major Business

2.1.3 Kikkoman Shoyu Product and Services

2.1.4 Kikkoman Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Kikkoman Recent Developments/Updates

2.2 Yamasa

2.2.1 Yamasa Details

2.2.2 Yamasa Major Business

2.2.3 Yamasa Shoyu Product and Services

2.2.4 Yamasa Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Yamasa Recent Developments/Updates

2.3 San-J

2.3.1 San-J Details

2.3.2 San-J Major Business

2.3.3 San-J Shoyu Product and Services

2.3.4 San-J Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 San-J Recent Developments/Updates

2.4 Aloha Shoyu

2.4.1 Aloha Shoyu Details

2.4.2 Aloha Shoyu Major Business

2.4.3 Aloha Shoyu Shoyu Product and Services

2.4.4 Aloha Shoyu Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Aloha Shoyu Recent Developments/Updates

2.5 Chiba Shoyu

2.5.1 Chiba Shoyu Details

2.5.2 Chiba Shoyu Major Business

2.5.3 Chiba Shoyu Shoyu Product and Services

2.5.4 Chiba Shoyu Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Chiba Shoyu Recent Developments/Updates

2.6 Fundokin Shoyu

2.6.1 Fundokin Shoyu Details

- 2.6.2 Fundokin Shoyu Major Business
- 2.6.3 Fundokin Shoyu Shoyu Product and Services
- 2.6.4 Fundokin Shoyu Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.6.5 Fundokin Shoyu Recent Developments/Updates
- 2.7 Shoda Shoyu
 - 2.7.1 Shoda Shoyu Details
 - 2.7.2 Shoda Shoyu Major Business
 - 2.7.3 Shoda Shoyu Shoyu Product and Services
 - 2.7.4 Shoda Shoyu Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.7.5 Shoda Shoyu Recent Developments/Updates
- 2.8 Kamada Soy Sauce
 - 2.8.1 Kamada Soy Sauce Details
 - 2.8.2 Kamada Soy Sauce Major Business
 - 2.8.3 Kamada Soy Sauce Shoyu Product and Services
 - 2.8.4 Kamada Soy Sauce Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.8.5 Kamada Soy Sauce Recent Developments/Updates
- 2.9 Higashimaru Shoyu
 - 2.9.1 Higashimaru Shoyu Details
 - 2.9.2 Higashimaru Shoyu Major Business
 - 2.9.3 Higashimaru Shoyu Shoyu Product and Services
 - 2.9.4 Higashimaru Shoyu Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.9.5 Higashimaru Shoyu Recent Developments/Updates
- 2.10 Takesan
 - 2.10.1 Takesan Details
 - 2.10.2 Takesan Major Business
 - 2.10.3 Takesan Shoyu Product and Services
 - 2.10.4 Takesan Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.10.5 Takesan Recent Developments/Updates
- 2.11 Lee Kum Kee
 - 2.11.1 Lee Kum Kee Details
 - 2.11.2 Lee Kum Kee Major Business
 - 2.11.3 Lee Kum Kee Shoyu Product and Services
 - 2.11.4 Lee Kum Kee Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

- 2.11.5 Lee Kum Kee Recent Developments/Updates
- 2.12 Amoy Food
 - 2.12.1 Amoy Food Details
 - 2.12.2 Amoy Food Major Business
 - 2.12.3 Amoy Food Shoyu Product and Services
 - 2.12.4 Amoy Food Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.12.5 Amoy Food Recent Developments/Updates
- 2.13 Kimlan Foods
 - 2.13.1 Kimlan Foods Details
 - 2.13.2 Kimlan Foods Major Business
 - 2.13.3 Kimlan Foods Shoyu Product and Services
 - 2.13.4 Kimlan Foods Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.13.5 Kimlan Foods Recent Developments/Updates
- 2.14 Wan Ja Shan
 - 2.14.1 Wan Ja Shan Details
 - 2.14.2 Wan Ja Shan Major Business
 - 2.14.3 Wan Ja Shan Shoyu Product and Services
 - 2.14.4 Wan Ja Shan Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.14.5 Wan Ja Shan Recent Developments/Updates
- 2.15 Sempio
 - 2.15.1 Sempio Details
 - 2.15.2 Sempio Major Business
 - 2.15.3 Sempio Shoyu Product and Services
 - 2.15.4 Sempio Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.15.5 Sempio Recent Developments/Updates
- 2.16 Danyang Yihe Food
 - 2.16.1 Danyang Yihe Food Details
 - 2.16.2 Danyang Yihe Food Major Business
 - 2.16.3 Danyang Yihe Food Shoyu Product and Services
 - 2.16.4 Danyang Yihe Food Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
 - 2.16.5 Danyang Yihe Food Recent Developments/Updates
- 2.17 Pearl River Bridge
 - 2.17.1 Pearl River Bridge Details
 - 2.17.2 Pearl River Bridge Major Business

- 2.17.3 Pearl River Bridge Shoyu Product and Services
- 2.17.4 Pearl River Bridge Shoyu Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)
- 2.17.5 Pearl River Bridge Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: SHOYU BY MANUFACTURER

- 3.1 Global Shoyu Sales Quantity by Manufacturer (2021-2026)
- 3.2 Global Shoyu Revenue by Manufacturer (2021-2026)
- 3.3 Global Shoyu Average Price by Manufacturer (2021-2026)
- 3.4 Market Share Analysis (2025)
 - 3.4.1 Producer Shipments of Shoyu by Manufacturer Revenue (\$MM) and Market Share (%): 2025
 - 3.4.2 Top 3 Shoyu Manufacturer Market Share in 2025
 - 3.4.3 Top 6 Shoyu Manufacturer Market Share in 2025
- 3.5 Shoyu Market: Overall Company Footprint Analysis
 - 3.5.1 Shoyu Market: Region Footprint
 - 3.5.2 Shoyu Market: Company Product Type Footprint
 - 3.5.3 Shoyu Market: Company Product Application Footprint
- 3.6 New Market Entrants and Barriers to Market Entry
- 3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

- 4.1 Global Shoyu Market Size by Region
 - 4.1.1 Global Shoyu Sales Quantity by Region (2021-2032)
 - 4.1.2 Global Shoyu Consumption Value by Region (2021-2032)
 - 4.1.3 Global Shoyu Average Price by Region (2021-2032)
- 4.2 North America Shoyu Consumption Value (2021-2032)
- 4.3 Europe Shoyu Consumption Value (2021-2032)
- 4.4 Asia-Pacific Shoyu Consumption Value (2021-2032)
- 4.5 South America Shoyu Consumption Value (2021-2032)
- 4.6 Middle East & Africa Shoyu Consumption Value (2021-2032)

5 MARKET SEGMENT BY TYPE

- 5.1 Global Shoyu Sales Quantity by Type (2021-2032)
- 5.2 Global Shoyu Consumption Value by Type (2021-2032)
- 5.3 Global Shoyu Average Price by Type (2021-2032)

6 MARKET SEGMENT BY APPLICATION

- 6.1 Global Shoyu Sales Quantity by Application (2021-2032)
- 6.2 Global Shoyu Consumption Value by Application (2021-2032)
- 6.3 Global Shoyu Average Price by Application (2021-2032)

7 NORTH AMERICA

- 7.1 North America Shoyu Sales Quantity by Type (2021-2032)
- 7.2 North America Shoyu Sales Quantity by Application (2021-2032)
- 7.3 North America Shoyu Market Size by Country
 - 7.3.1 North America Shoyu Sales Quantity by Country (2021-2032)
 - 7.3.2 North America Shoyu Consumption Value by Country (2021-2032)
 - 7.3.3 United States Market Size and Forecast (2021-2032)
 - 7.3.4 Canada Market Size and Forecast (2021-2032)
 - 7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

- 8.1 Europe Shoyu Sales Quantity by Type (2021-2032)
- 8.2 Europe Shoyu Sales Quantity by Application (2021-2032)
- 8.3 Europe Shoyu Market Size by Country
 - 8.3.1 Europe Shoyu Sales Quantity by Country (2021-2032)
 - 8.3.2 Europe Shoyu Consumption Value by Country (2021-2032)
 - 8.3.3 Germany Market Size and Forecast (2021-2032)
 - 8.3.4 France Market Size and Forecast (2021-2032)
 - 8.3.5 United Kingdom Market Size and Forecast (2021-2032)
 - 8.3.6 Russia Market Size and Forecast (2021-2032)
 - 8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

- 9.1 Asia-Pacific Shoyu Sales Quantity by Type (2021-2032)
- 9.2 Asia-Pacific Shoyu Sales Quantity by Application (2021-2032)
- 9.3 Asia-Pacific Shoyu Market Size by Region
 - 9.3.1 Asia-Pacific Shoyu Sales Quantity by Region (2021-2032)
 - 9.3.2 Asia-Pacific Shoyu Consumption Value by Region (2021-2032)
 - 9.3.3 China Market Size and Forecast (2021-2032)

- 9.3.4 Japan Market Size and Forecast (2021-2032)
- 9.3.5 South Korea Market Size and Forecast (2021-2032)
- 9.3.6 India Market Size and Forecast (2021-2032)
- 9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
- 9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

- 10.1 South America Shoyu Sales Quantity by Type (2021-2032)
- 10.2 South America Shoyu Sales Quantity by Application (2021-2032)
- 10.3 South America Shoyu Market Size by Country
 - 10.3.1 South America Shoyu Sales Quantity by Country (2021-2032)
 - 10.3.2 South America Shoyu Consumption Value by Country (2021-2032)
 - 10.3.3 Brazil Market Size and Forecast (2021-2032)
 - 10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

- 11.1 Middle East & Africa Shoyu Sales Quantity by Type (2021-2032)
- 11.2 Middle East & Africa Shoyu Sales Quantity by Application (2021-2032)
- 11.3 Middle East & Africa Shoyu Market Size by Country
 - 11.3.1 Middle East & Africa Shoyu Sales Quantity by Country (2021-2032)
 - 11.3.2 Middle East & Africa Shoyu Consumption Value by Country (2021-2032)
 - 11.3.3 Turkey Market Size and Forecast (2021-2032)
 - 11.3.4 Egypt Market Size and Forecast (2021-2032)
 - 11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)
 - 11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

- 12.1 Shoyu Market Drivers
- 12.2 Shoyu Market Restraints
- 12.3 Shoyu Trends Analysis
- 12.4 Porters Five Forces Analysis
 - 12.4.1 Threat of New Entrants
 - 12.4.2 Bargaining Power of Suppliers
 - 12.4.3 Bargaining Power of Buyers
 - 12.4.4 Threat of Substitutes
 - 12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

- 13.1 Raw Material of Shoyu and Key Manufacturers
- 13.2 Manufacturing Costs Percentage of Shoyu
- 13.3 Shoyu Production Process
- 13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

- 14.1 Sales Channel
 - 14.1.1 Direct to End-User
 - 14.1.2 Distributors
- 14.2 Shoyu Typical Distributors
- 14.3 Shoyu Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

- 16.1 Methodology
- 16.2 Research Process and Data Source
- 16.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. Global Shoyu Consumption Value by Type, (USD Million), 2021 & 2025 & 2032

Table 2. Global Shoyu Consumption Value by Production Method, (USD Million), 2021 & 2025 & 2032

Table 3. Global Shoyu Consumption Value by Flavor Positioning, (USD Million), 2021 & 2025 & 2032

Table 4. Global Shoyu Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Table 5. Kikkoman Basic Information, Manufacturing Base and Competitors

Table 6. Kikkoman Major Business

Table 7. Kikkoman Shoyu Product and Services

Table 8. Kikkoman Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 9. Kikkoman Recent Developments/Updates

Table 10. Yamasa Basic Information, Manufacturing Base and Competitors

Table 11. Yamasa Major Business

Table 12. Yamasa Shoyu Product and Services

Table 13. Yamasa Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 14. Yamasa Recent Developments/Updates

Table 15. San-J Basic Information, Manufacturing Base and Competitors

Table 16. San-J Major Business

Table 17. San-J Shoyu Product and Services

Table 18. San-J Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 19. San-J Recent Developments/Updates

Table 20. Aloha Shoyu Basic Information, Manufacturing Base and Competitors

Table 21. Aloha Shoyu Major Business

Table 22. Aloha Shoyu Shoyu Product and Services

Table 23. Aloha Shoyu Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. Aloha Shoyu Recent Developments/Updates

Table 25. Chiba Shoyu Basic Information, Manufacturing Base and Competitors

Table 26. Chiba Shoyu Major Business

Table 27. Chiba Shoyu Shoyu Product and Services

Table 28. Chiba Shoyu Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter),

Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. Chiba Shoyu Recent Developments/Updates

Table 30. Fundokin Shoyu Basic Information, Manufacturing Base and Competitors

Table 31. Fundokin Shoyu Major Business

Table 32. Fundokin Shoyu Shoyu Product and Services

Table 33. Fundokin Shoyu Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. Fundokin Shoyu Recent Developments/Updates

Table 35. Shoda Shoyu Basic Information, Manufacturing Base and Competitors

Table 36. Shoda Shoyu Major Business

Table 37. Shoda Shoyu Shoyu Product and Services

Table 38. Shoda Shoyu Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. Shoda Shoyu Recent Developments/Updates

Table 40. Kamada Soy Sauce Basic Information, Manufacturing Base and Competitors

Table 41. Kamada Soy Sauce Major Business

Table 42. Kamada Soy Sauce Shoyu Product and Services

Table 43. Kamada Soy Sauce Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Kamada Soy Sauce Recent Developments/Updates

Table 45. Higashimaru Shoyu Basic Information, Manufacturing Base and Competitors

Table 46. Higashimaru Shoyu Major Business

Table 47. Higashimaru Shoyu Shoyu Product and Services

Table 48. Higashimaru Shoyu Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. Higashimaru Shoyu Recent Developments/Updates

Table 50. Takesan Basic Information, Manufacturing Base and Competitors

Table 51. Takesan Major Business

Table 52. Takesan Shoyu Product and Services

Table 53. Takesan Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 54. Takesan Recent Developments/Updates

Table 55. Lee Kum Kee Basic Information, Manufacturing Base and Competitors

Table 56. Lee Kum Kee Major Business

Table 57. Lee Kum Kee Shoyu Product and Services

Table 58. Lee Kum Kee Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 59. Lee Kum Kee Recent Developments/Updates

Table 60. Amoy Food Basic Information, Manufacturing Base and Competitors

- Table 61. Amoy Food Major Business
- Table 62. Amoy Food Shoyu Product and Services
- Table 63. Amoy Food Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 64. Amoy Food Recent Developments/Updates
- Table 65. Kimlan Foods Basic Information, Manufacturing Base and Competitors
- Table 66. Kimlan Foods Major Business
- Table 67. Kimlan Foods Shoyu Product and Services
- Table 68. Kimlan Foods Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 69. Kimlan Foods Recent Developments/Updates
- Table 70. Wan Ja Shan Basic Information, Manufacturing Base and Competitors
- Table 71. Wan Ja Shan Major Business
- Table 72. Wan Ja Shan Shoyu Product and Services
- Table 73. Wan Ja Shan Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 74. Wan Ja Shan Recent Developments/Updates
- Table 75. Sempio Basic Information, Manufacturing Base and Competitors
- Table 76. Sempio Major Business
- Table 77. Sempio Shoyu Product and Services
- Table 78. Sempio Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 79. Sempio Recent Developments/Updates
- Table 80. Danyang Yihe Food Basic Information, Manufacturing Base and Competitors
- Table 81. Danyang Yihe Food Major Business
- Table 82. Danyang Yihe Food Shoyu Product and Services
- Table 83. Danyang Yihe Food Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 84. Danyang Yihe Food Recent Developments/Updates
- Table 85. Pearl River Bridge Basic Information, Manufacturing Base and Competitors
- Table 86. Pearl River Bridge Major Business
- Table 87. Pearl River Bridge Shoyu Product and Services
- Table 88. Pearl River Bridge Shoyu Sales Quantity (Million Liters), Average Price (US\$/Liter), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 89. Pearl River Bridge Recent Developments/Updates
- Table 90. Global Shoyu Sales Quantity by Manufacturer (2021-2026) & (Million Liters)
- Table 91. Global Shoyu Revenue by Manufacturer (2021-2026) & (USD Million)
- Table 92. Global Shoyu Average Price by Manufacturer (2021-2026) & (US\$/Liter)
- Table 93. Market Position of Manufacturers in Shoyu, (Tier 1, Tier 2, and Tier 3), Based

on Revenue in 2025

Table 94. Head Office and Shoyu Production Site of Key Manufacturer

Table 95. Shoyu Market: Company Product Type Footprint

Table 96. Shoyu Market: Company Product Application Footprint

Table 97. Shoyu New Market Entrants and Barriers to Market Entry

Table 98. Shoyu Mergers, Acquisition, Agreements, and Collaborations

Table 99. Global Shoyu Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 100. Global Shoyu Sales Quantity by Region (2021-2026) & (Million Liters)

Table 101. Global Shoyu Sales Quantity by Region (2027-2032) & (Million Liters)

Table 102. Global Shoyu Consumption Value by Region (2021-2026) & (USD Million)

Table 103. Global Shoyu Consumption Value by Region (2027-2032) & (USD Million)

Table 104. Global Shoyu Average Price by Region (2021-2026) & (US\$/Liter)

Table 105. Global Shoyu Average Price by Region (2027-2032) & (US\$/Liter)

Table 106. Global Shoyu Sales Quantity by Type (2021-2026) & (Million Liters)

Table 107. Global Shoyu Sales Quantity by Type (2027-2032) & (Million Liters)

Table 108. Global Shoyu Consumption Value by Type (2021-2026) & (USD Million)

Table 109. Global Shoyu Consumption Value by Type (2027-2032) & (USD Million)

Table 110. Global Shoyu Average Price by Type (2021-2026) & (US\$/Liter)

Table 111. Global Shoyu Average Price by Type (2027-2032) & (US\$/Liter)

Table 112. Global Shoyu Sales Quantity by Application (2021-2026) & (Million Liters)

Table 113. Global Shoyu Sales Quantity by Application (2027-2032) & (Million Liters)

Table 114. Global Shoyu Consumption Value by Application (2021-2026) & (USD Million)

Table 115. Global Shoyu Consumption Value by Application (2027-2032) & (USD Million)

Table 116. Global Shoyu Average Price by Application (2021-2026) & (US\$/Liter)

Table 117. Global Shoyu Average Price by Application (2027-2032) & (US\$/Liter)

Table 118. North America Shoyu Sales Quantity by Type (2021-2026) & (Million Liters)

Table 119. North America Shoyu Sales Quantity by Type (2027-2032) & (Million Liters)

Table 120. North America Shoyu Sales Quantity by Application (2021-2026) & (Million Liters)

Table 121. North America Shoyu Sales Quantity by Application (2027-2032) & (Million Liters)

Table 122. North America Shoyu Sales Quantity by Country (2021-2026) & (Million Liters)

Table 123. North America Shoyu Sales Quantity by Country (2027-2032) & (Million Liters)

Table 124. North America Shoyu Consumption Value by Country (2021-2026) & (USD Million)

Million)

Table 125. North America Shoyu Consumption Value by Country (2027-2032) & (USD Million)

Table 126. Europe Shoyu Sales Quantity by Type (2021-2026) & (Million Liters)

Table 127. Europe Shoyu Sales Quantity by Type (2027-2032) & (Million Liters)

Table 128. Europe Shoyu Sales Quantity by Application (2021-2026) & (Million Liters)

Table 129. Europe Shoyu Sales Quantity by Application (2027-2032) & (Million Liters)

Table 130. Europe Shoyu Sales Quantity by Country (2021-2026) & (Million Liters)

Table 131. Europe Shoyu Sales Quantity by Country (2027-2032) & (Million Liters)

Table 132. Europe Shoyu Consumption Value by Country (2021-2026) & (USD Million)

Table 133. Europe Shoyu Consumption Value by Country (2027-2032) & (USD Million)

Table 134. Asia-Pacific Shoyu Sales Quantity by Type (2021-2026) & (Million Liters)

Table 135. Asia-Pacific Shoyu Sales Quantity by Type (2027-2032) & (Million Liters)

Table 136. Asia-Pacific Shoyu Sales Quantity by Application (2021-2026) & (Million Liters)

Table 137. Asia-Pacific Shoyu Sales Quantity by Application (2027-2032) & (Million Liters)

Table 138. Asia-Pacific Shoyu Sales Quantity by Region (2021-2026) & (Million Liters)

Table 139. Asia-Pacific Shoyu Sales Quantity by Region (2027-2032) & (Million Liters)

Table 140. Asia-Pacific Shoyu Consumption Value by Region (2021-2026) & (USD Million)

Table 141. Asia-Pacific Shoyu Consumption Value by Region (2027-2032) & (USD Million)

Table 142. South America Shoyu Sales Quantity by Type (2021-2026) & (Million Liters)

Table 143. South America Shoyu Sales Quantity by Type (2027-2032) & (Million Liters)

Table 144. South America Shoyu Sales Quantity by Application (2021-2026) & (Million Liters)

Table 145. South America Shoyu Sales Quantity by Application (2027-2032) & (Million Liters)

Table 146. South America Shoyu Sales Quantity by Country (2021-2026) & (Million Liters)

Table 147. South America Shoyu Sales Quantity by Country (2027-2032) & (Million Liters)

Table 148. South America Shoyu Consumption Value by Country (2021-2026) & (USD Million)

Table 149. South America Shoyu Consumption Value by Country (2027-2032) & (USD Million)

Table 150. Middle East & Africa Shoyu Sales Quantity by Type (2021-2026) & (Million Liters)

Table 151. Middle East & Africa Shoyu Sales Quantity by Type (2027-2032) & (Million Liters)

Table 152. Middle East & Africa Shoyu Sales Quantity by Application (2021-2026) & (Million Liters)

Table 153. Middle East & Africa Shoyu Sales Quantity by Application (2027-2032) & (Million Liters)

Table 154. Middle East & Africa Shoyu Sales Quantity by Country (2021-2026) & (Million Liters)

Table 155. Middle East & Africa Shoyu Sales Quantity by Country (2027-2032) & (Million Liters)

Table 156. Middle East & Africa Shoyu Consumption Value by Country (2021-2026) & (USD Million)

Table 157. Middle East & Africa Shoyu Consumption Value by Country (2027-2032) & (USD Million)

Table 158. Shoyu Raw Material

Table 159. Key Manufacturers of Shoyu Raw Materials

Table 160. Shoyu Typical Distributors

Table 161. Shoyu Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Shoyu Picture
- Figure 2. Global Shoyu Revenue by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Shoyu Revenue Market Share by Type in 2025
- Figure 4. Koikuchi Shoyu Examples
- Figure 5. Usukuchi Shoyu Examples
- Figure 6. Tamari Shoyu Examples
- Figure 7. Saishikomi Shoyu Examples
- Figure 8. Shiro Shoyu Examples
- Figure 9. Global Shoyu Revenue by Production Method, (USD Million), 2021 & 2025 & 2032
- Figure 10. Global Shoyu Revenue Market Share by Production Method in 2025
- Figure 11. Honjozo Soy Sauce Examples
- Figure 12. Mixed-Brewed Soy Sauce Examples
- Figure 13. Formulated Soy Sauce Examples
- Figure 14. Global Shoyu Revenue by Flavor Positioning, (USD Million), 2021 & 2025 & 2032
- Figure 15. Global Shoyu Revenue Market Share by Flavor Positioning in 2025
- Figure 16. Standard Umami-Salty Profile Shoyu Examples
- Figure 17. Light-Colored Delicate Profile Shoyu Examples
- Figure 18. Rich Aromatic Profile Shoyu Examples
- Figure 19. Other Examples
- Figure 20. Global Shoyu Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 21. Global Shoyu Revenue Market Share by Application in 2025
- Figure 22. Foodservice Kitchen Seasoning Use Examples
- Figure 23. Food Industrial Processing Use Examples
- Figure 24. Premium Gift and High-End Consumer Use Examples
- Figure 25. Others Examples
- Figure 26. Global Shoyu Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 27. Global Shoyu Consumption Value and Forecast (2021-2032) & (USD Million)
- Figure 28. Global Shoyu Sales Quantity (2021-2032) & (Million Liters)
- Figure 29. Global Shoyu Price (2021-2032) & (US\$/Liter)
- Figure 30. Global Shoyu Sales Quantity Market Share by Manufacturer in 2025
- Figure 31. Global Shoyu Revenue Market Share by Manufacturer in 2025
- Figure 32. Producer Shipments of Shoyu by Manufacturer Sales (\$MM) and Market

Share (%): 2025

Figure 33. Top 3 Shoyu Manufacturer (Revenue) Market Share in 2025

Figure 34. Top 6 Shoyu Manufacturer (Revenue) Market Share in 2025

Figure 35. Global Shoyu Sales Quantity Market Share by Region (2021-2032)

Figure 36. Global Shoyu Consumption Value Market Share by Region (2021-2032)

Figure 37. North America Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 38. Europe Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 39. Asia-Pacific Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 40. South America Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 41. Middle East & Africa Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 42. Global Shoyu Sales Quantity Market Share by Type (2021-2032)

Figure 43. Global Shoyu Consumption Value Market Share by Type (2021-2032)

Figure 44. Global Shoyu Average Price by Type (2021-2032) & (US\$/Liter)

Figure 45. Global Shoyu Sales Quantity Market Share by Application (2021-2032)

Figure 46. Global Shoyu Revenue Market Share by Application (2021-2032)

Figure 47. Global Shoyu Average Price by Application (2021-2032) & (US\$/Liter)

Figure 48. North America Shoyu Sales Quantity Market Share by Type (2021-2032)

Figure 49. North America Shoyu Sales Quantity Market Share by Application (2021-2032)

Figure 50. North America Shoyu Sales Quantity Market Share by Country (2021-2032)

Figure 51. North America Shoyu Consumption Value Market Share by Country (2021-2032)

Figure 52. United States Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 53. Canada Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 54. Mexico Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 55. Europe Shoyu Sales Quantity Market Share by Type (2021-2032)

Figure 56. Europe Shoyu Sales Quantity Market Share by Application (2021-2032)

Figure 57. Europe Shoyu Sales Quantity Market Share by Country (2021-2032)

Figure 58. Europe Shoyu Consumption Value Market Share by Country (2021-2032)

Figure 59. Germany Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 60. France Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 61. United Kingdom Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 62. Russia Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 63. Italy Shoyu Consumption Value (2021-2032) & (USD Million)

Figure 64. Asia-Pacific Shoyu Sales Quantity Market Share by Type (2021-2032)

Figure 65. Asia-Pacific Shoyu Sales Quantity Market Share by Application (2021-2032)

Figure 66. Asia-Pacific Shoyu Sales Quantity Market Share by Region (2021-2032)

Figure 67. Asia-Pacific Shoyu Consumption Value Market Share by Region (2021-2032)

Figure 68. China Shoyu Consumption Value (2021-2032) & (USD Million)

- Figure 69. Japan Shoyu Consumption Value (2021-2032) & (USD Million)
- Figure 70. South Korea Shoyu Consumption Value (2021-2032) & (USD Million)
- Figure 71. India Shoyu Consumption Value (2021-2032) & (USD Million)
- Figure 72. Southeast Asia Shoyu Consumption Value (2021-2032) & (USD Million)
- Figure 73. Australia Shoyu Consumption Value (2021-2032) & (USD Million)
- Figure 74. South America Shoyu Sales Quantity Market Share by Type (2021-2032)
- Figure 75. South America Shoyu Sales Quantity Market Share by Application (2021-2032)
- Figure 76. South America Shoyu Sales Quantity Market Share by Country (2021-2032)
- Figure 77. South America Shoyu Consumption Value Market Share by Country (2021-2032)
- Figure 78. Brazil Shoyu Consumption Value (2021-2032) & (USD Million)
- Figure 79. Argentina Shoyu Consumption Value (2021-2032) & (USD Million)
- Figure 80. Middle East & Africa Shoyu Sales Quantity Market Share by Type (2021-2032)
- Figure 81. Middle East & Africa Shoyu Sales Quantity Market Share by Application (2021-2032)
- Figure 82. Middle East & Africa Shoyu Sales Quantity Market Share by Country (2021-2032)
- Figure 83. Middle East & Africa Shoyu Consumption Value Market Share by Country (2021-2032)
- Figure 84. Turkey Shoyu Consumption Value (2021-2032) & (USD Million)
- Figure 85. Egypt Shoyu Consumption Value (2021-2032) & (USD Million)
- Figure 86. Saudi Arabia Shoyu Consumption Value (2021-2032) & (USD Million)
- Figure 87. South Africa Shoyu Consumption Value (2021-2032) & (USD Million)
- Figure 88. Shoyu Market Drivers
- Figure 89. Shoyu Market Restraints
- Figure 90. Shoyu Market Trends
- Figure 91. Porters Five Forces Analysis
- Figure 92. Manufacturing Cost Structure Analysis of Shoyu in 2025
- Figure 93. Manufacturing Process Analysis of Shoyu
- Figure 94. Shoyu Industrial Chain
- Figure 95. Sales Channel: Direct to End-User vs Distributors
- Figure 96. Direct Channel Pros & Cons
- Figure 97. Indirect Channel Pros & Cons
- Figure 98. Methodology
- Figure 99. Research Process and Data Source

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