

Global Shoyu Market Growth 2026-2032

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Abstracts

The global Shoyu market size is predicted to grow from US\$ 3375 million in 2025 to US\$ 4650 million in 2032; it is expected to grow at a CAGR of 4.7% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Shoyu Industry Forecast" looks at past sales and reviews total world Shoyu sales in 2025, providing a comprehensive analysis by region and market sector of projected Shoyu sales for 2026 through 2032. With Shoyu sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Shoyu industry.

This Insight Report provides a comprehensive analysis of the global Shoyu landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Shoyu portfolios and capabilities,

market entry strategies, market positions, and geographic footprints, to better understand these firms? unique position in an accelerating global Shoyu market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Shoyu and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Shoyu.

This report presents a comprehensive overview, market shares, and growth opportunities of Shoyu market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Koikuchi Shoyu

Usukuchi Shoyu

Tamari Shoyu

Saishikomi Shoyu

Shiro Shoyu

Segmentation by Production Method:

Honjozo Soy Sauce

Mixed-Brewed Soy Sauce

Formulated Soy Sauce

Segmentation by Flavor Positioning:

Standard Umami-Salty Profile Shoyu

Light-Colored Delicate Profile Shoyu

Rich Aromatic Profile Shoyu

Other

Segmentation by Application:

Foodservice Kitchen Seasoning Use

Food Industrial Processing Use

Premium Gift and High-End Consumer Use

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Shoyu market?

What factors are driving Shoyu market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Shoyu market opportunities vary by end market size?

How does Shoyu break out by Type, by Application?

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