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China Soy Sauce Industry Overview, 2017-2021

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Abstracts

Description

Soy sauce, a kind of condiment used for cooking East Asian cuisines, is made from soybeans. The ingredients of soy sauce are quite complicated. In addition to salt, it also contains various kinds of amino acids, carbohydrate, organic acid, spices, etc. The flavor of soy sauce is mainly salty and it can also be umami and aromatic.

Soy sauce can be classified by brewing technique, by raw material, by function and by usage. According to Chinese official standards, soy source can be classified into the brewed and the formulated by raw material; It can be produced by low-salt solid technique, leaching technique and high-salt liquid technique; It also can be categorized into supreme, first-class, second-class and third-class soy sauces by quality (i.e. amino acid nitrogen content).

Soy sauce is the leading product in China's condiment industry with the largest annual output volume, presenting huge potential for growth. In recent years, China's soy sauce output volume has been constantly increasing. It exceeded 10 million tons in 2016 according to CRI market research.

In the past few years, in terms of output volume, leading enterprises were Foshan Haitian Flavoring & Food Co., Ltd., Jonjee Hi-tech Industrial & Commercial Holding Co., Ltd., Jiajia Food Group Co., Ltd., Lee Kum Kee and Shanghai Totole Food Co., Ltd. They are all national enterprises with nationwide sales channels. There are also some regional soy sauce producers with regional sales channels. Currently, with specification of channels and products, leading enterprises in China's soy sauce industry are rapidly expanding through nationwide advertising, multi-channel marketing strategies, acquisitions and restructuring. They are becoming integrators of the industry based on diversified operations.

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In China, soy sauce is mainly produced in high-salt liquid and low-salt solid, and the former produces higher-quality soy sauce with rich flavors. Major consumers are from the catering industry and households. In recent years, with the improved consumption standards and nutrition awareness of Chinese consumers, demand for soy sauce with special features has been increasing. In addition, inexpensive soy sauce also enjoys a large market mainly in the third and fourth tier cities and rural areas. However, soy sauce products will move from the middle end to the high end and structural adjustment is a long-term trend given the overall consumption upgrading of the society.

From CRI analysis, China's soy sauce industry has huge room to grow. For one thing, catering industry's demand for soy sauce is stimulated because residents' income increases and the lifestyle changes and people eating out more often. For the other, demand for high-end soy sauce will continue to increase with the progress of China's soy sauce brewing techniques, the fusion of eastern and western catering cultures and consumers' growing health awareness.

Readers can obtain the following information or more through this report:

Development Environment of Soy Sauce Brewing Industry in China

Production and Demand of Soy Sauce in China

Competition in Soy Sauce Market in China

Top 5 Soy Sauce Producers in China

Price Trend of Major Raw Materials of Soy Sauce Brewing in China, 2013-2016

Major Driving Forces and Market Opportunities in Soy Sauce Industry in China, 2017-2021

Threats and Challenges in Soy Sauce Industry in China, 2017-2021

Forecast on Supply and Demand of Soy Sauce in China, 2017-2021

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