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Research Report on Condiment Industry in China, 2011-2020

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Abstracts

Description

Condiments in the report include soy sauce, vinegar, monosodium glutamate, essence of chicken, ketchup and compound condiments.

In 2015, market size of condiments in China surpassed CNY 200 billion. Annual growth rate has remained above 15% in recent years.

Soy sauce is the most important condiment in China with output volume exceeding 9 million tons. There are hundreds of soy sauce manufacturers in China. Chinese soy sauce industry is in the phase of bipolar differentiation. Major enterprises, such as Haitian and Lee Kum Kee, occupy most market shares in China. Other enterprises become regional brands or merged with large enterprises.

In China, monosodium glutamate industry is highly homogeneous. Manufacturers are faced with pollution problems with different requirements of environment protection from local governments. Moreover, as health concern increases, Chinese consumers gradually transfer from using monosodium glutamate to chicken essence and compound condiments. Therefore, Chinese monosodium glutamate industry is faced with difficulties. The chicken essence industry is mostly monopolized by leading enterprises in China. Totole is very popular in East China and North China while Knorr dominates the market in South China. Enterprises have huge potential for growth in chicken essence market due to the large market space for chicken essence products. Therefore it is possible that some competitive enterprises will rise in the chicken essence market.

Market of paste and sauce products grows rapidly with uneven development in China. Most fastest- growing enterprises are located in South China and East China. Sauce products with large sales volumes are chili sauce, meat paste, tomato paste and bean paste.

The downstream of condiment industry includes catering industry, household consumption and food processing industry. As market competition becomes intense, some foreign- funded enterprises upgrade their marketing models, shifting focus onto diet planning (professional solutions for catering industry). Unlike the sales of traditional condiments, diet planning is about providing professional advice on kitchen management, assist in designing menus and developing new cuisines for restaurants, instructing chefs on the use of standard condiments so as to enhance efficiency. The sales of condiment products will be improved as the enterprises maintain close relations with the chefs and restaurants.

For traditional Chinese condiments such as soy sauce and vinegar, sales differ extensively in different regions in China. Therefore, it is difficult for cross- national companies to compete with renowned local brands and regional brands in China. Only by providing differential services for catering industry and avoiding direct competition with local enterprises, can they increase their market shares.

The demand for condiments keeps increasing as the economy develops in China. Meanwhile, the product structure is constantly upgrading, for example, monosodium glutamate is giving way to chicken essence, oyster sauce has occupied part of the soy sauce market and compound condiments are more prevailing. It is estimated that condiment industry in China will further integrate in the next few years with market concentration rate continuing to rise.

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

Government Policies for Condiment Industry in China

Development Status of Sub- industries of Condiments in China

Sales Channels of Condiments in China

Analysis on Major Enterprises and the Operation Status in Condiment Market in China

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Competition in Condiment Market in China

Import and Export Status of Condiments in China

Development Trend of Condiment Industry in China

The following enterprises and people are proposed to purchase this report:

Manufacturers of Condiments

Suppliers of Raw Materials for Condiments

Catering Enterprises

Food Manufacturers

Investors/Research Institutes Concerned about Condiment Industry in China

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