



Sauces, Dips and Condiments in Japan

November 2025

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Sauces, Dips and Condiments in Japan - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Population decline and inflation hinder volume sales

INDUSTRY PERFORMANCE

Rapid price increase and population decline leads to falls in volume sales in 2025

Dips leads value growth in 2025

WHAT'S NEXT?

Ready meal competition grows as Japan's population shrinks

Low-salt products to see strong consumer demand

Big players are launching vegan and vegetable friendly products

COMPETITIVE LANDSCAPE

House Foods leads. while Kewpie Mayonnaise celebrates 100 years in 2025

CHANNELS

Offline retail distribution dominance persists

While e-commerce expands, consumers continue to prefer store-based outlets

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Cooking Ingredients and Meals in Japan - Industry Overview

EXECUTIVE SUMMARY

Consumers cut back due to inflationary pressures

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Unit price hikes push value sales in 2025

Convenience demand intensifies, shaping innovation

Surging costs in rice result in consumer shift towards alternatives, impacting preferences in ingredients

WHAT'S NEXT?

Continued shift away from rice and towards alternative staples

Anticipated rising demand for ingredients suited to pasta and flour-based meals

COMPETITIVE LANDSCAPE

Domestic players dominate a highly fragmented landscape

Leading companies maintain stronghold through rapid response to evolving demand

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