

## Seasonings, Spices and Other Ingredients

December 27, 2011

SEASONINGS, SPICES AND OTHER INGREDIENTS PREPARED  
SEASONINGS (COMBINED SEASONINGS) ARE INCREASING

Let's begin by looking at the consumption trend of home-use spices and seasonings from the data for household consumption expenditure during the first half of 2011 by Ministry of Internal Affairs and Communications. The amount of expenditures spent on spices & seasonings during the first half of the year per household in Japan was 17,653 yen, and this was a 2.2% increase from the same period last year. Seeing this in a half year span, there was a small drop for the first time in 4 years during the first half of last year, and since the latter half also decreased, there were worries for the down trend of spices. But there was a plus in January for the first time in 11 months, and this continued in February. In March, after the Great East Japan Earthquake, there was a return of home cooking that caused a 6% rise, and this tendency continued after April. Overall, the latter half of the year made a 2.2% increase. The amount of spending marked the highest in 10 years, even though the number of members in each household is decreasing.

On an item basis, Japanese seasonings such as miso and soy sauce was a minus, but dressing, jam, curry roux (mixture to make curry sauce) were a plus. Worcestershire sauce made growth in value. Also, looking at the items on a value basis, soup, sauce, flavor seasonings, and prepared seasonings made stable growth. This is because these ingredients make cooking easy, and this had been the trend. In addition to this, the change in eating habits after the 3.11 Earthquake could be another possibility.

In household consumption, Japanese basic seasonings are not making much progress, but spices & seasonings that make cooking easier such as "soup, sauce" are increasing. Many Western seasonings are connected with dishes using vegetables such as salad. This has been increasing with the background of people having the tendency to eat more vegetables. Although dressing increased 2.1% (volume) during the first half of this year, mayonnaise, sauce, and ketchup all decreased in volume. Jam increased a little because of the increasing variety of bread.

"Other seasonings" that accounts for about 30% of all seasonings became a leading force in the seasoning market with an increase of 4.8%. This category includes spices, and prepared seasonings (combined seasoning) that makes cooking easier is the reason for its increase. In addition to combined seasonings for Chinese food, which has been the most popular, there are Japanese soy sauce based seasonings or Western tomato or demiglass sauce based seasonings from many companies. Products using microwave for cooking is increasing too. Also, there are products that help you make fried, stewed, soup, and

steamed dishes very easily. Working wives support these products since they can make homemade foods easily. In addition to this, the companies place emphasis on eating vegetables, which help their growth. Seasonings that make cooking easy are increasing its demand.

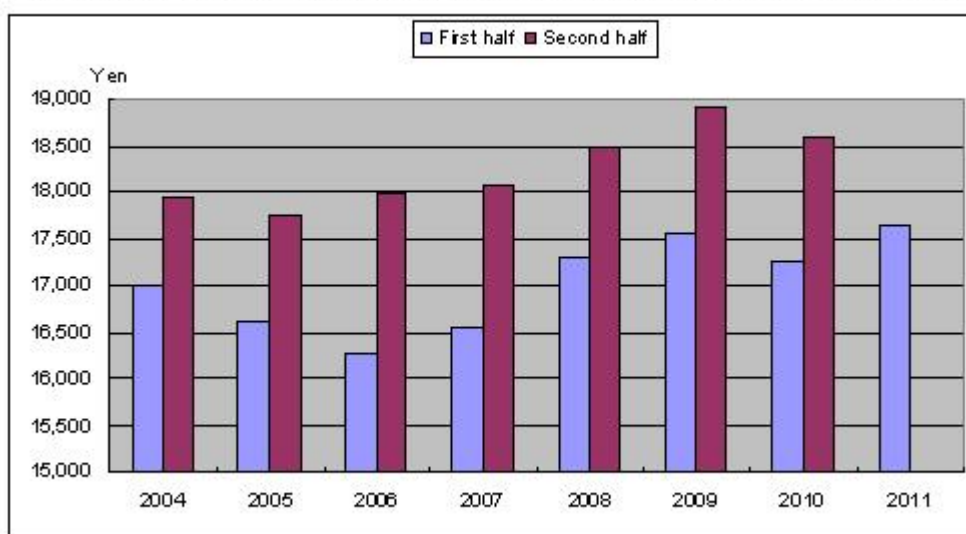
"Chili oil that you can eat" is one of the trends within Japan. It is a side dish-type seasoning packed in a glass container. It could be used as an accent in many types of dishes, and it could also be used for an accompaniment for rice. Also, some are used in bread. Chili oil is the pioneer, but there are also products using curry, soy sauce, wasabi, tomato, and Japanese pepper as the basic ingredient by many companies. In all cases, the products include small pieces of chopped vegetables and other ingredients, but in order to have an abundant meal, it is important to have larger ingredients and this will become a key in making a category. As for market needs, smaller containers are one of the trends. Due to the rise of households with fewer members such as elder couples, more people are looking for "amounts that could be eaten while fresh with 2 people." Each major company has succeeded in creating smaller sizes of soy sauce, miso, sauce, and dressing.

**Household Consumption Expenditures for Spices & Seasonings**

Items	unit	Per household nationwide							Jan-Jul. accumulated	
		Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Jan-Jul.	YY
Spices as a whole	JPY	2,842	2,799	3,126	2,819	2,990	3,077	2,984	20,637	101.8
Salt	JPY	33	31	38	39	46	63	56	305	94.7
	g	138	147	157	166	235	305	271	1,419	91.6
Soy sauce	JPY	142	152	180	166	156	167	205	1,168	99.0
	g	482	526	603	572	512	484	677	3,856	98.0
Miso	JPY	184	194	229	215	202	190	186	1,400	94.1
	g	498	493	596	557	549	427	491	3,611	94.2
Sugar	JPY	101	114	121	97	113	166	110	822	102.2
	g	473	570	569	469	530	635	550	3,786	97.9
Vinegar	JPY	81	80	90	97	109	134	127	718	97.2
	g	154	190	187	154	192	296	322	1,495	98.0
Sauce	JPY	65	66	71	71	71	62	59	465	101.1
	g	130	152	157	145	144	135	136	999	98.7
Ketchup	JPY	45	46	54	49	53	50	42	339	99.4
	g	120	124	142	139	148	133	117	923	98.4
Mayonnaise	JPY	86	97	115	107	122	120	114	761	96.9
	g	176	195	232	221	248	244	245	1,561	99.1
Dressing	JPY	111	124	147	158	180	190	182	1,092	102.2
	g	120	134	159	164	184	207	190	1,158	101.4
Jam	JPY	91	92	112	112	115	96	91	709	99.9
	g	98	91	124	120	125	97	95	750	100.4
Curry roux	JPY	118	122	151	133	144	142	145	955	103.2
	g	140	137	175	144	166	153	173	1,088	102.9
Dried soup	JPY	252	232	275	187	183	178	149	1,466	111.1
Flavor seasonings	JPY	157	165	182	146	163	156	131	1,100	103.0
Seasoned dried spices	JPY	121	115	154	127	128	125	135	905	101.9
Soup, sauce	JPY	373	310	295	308	346	326	390	2,348	102.8
Others	JPY	884	858	911	806	861	912	861	6,093	103.4

Note) Annual Census on Households by Ministry of Internal Affairs and Communications.

### Household Consumption Expenditures of Seasoning & Spices for Half-year Term



Note) Annual Census on Households by Ministry of Internal Affairs and Communications.

## Prepared Seasonings

As for prepared seasonings, seasonings for Chinese menus such as fiery hot tofu were made around 40 years ago under the concept of easy home cooking. At that time, it was the period where there was diversification in eating such as eating outside, and people started to eat something that was not Japanese at home. Since there were many Chinese noodle restaurants in Japan, Chinese food was familiar to Japanese people. But it was challenging to make Chinese food at home, since you needed special seasonings. Since prepared seasonings allow you to make those challenging dishes very easily, many customers supported it right away. More companies joined this field, menu variation expanded, and soon it became one of the categories of seasonings.

Soon after, they started selling Korean flavored seasonings, and now, they also have Japanese and Western. In addition to this, the ways of cooking is also thought out, and there are steamed dishes and microwave cooking as well. The market grew to 50 billion yen in Japan.

It is estimated that general home made dishes decreased. Decrease of home cooking is negative for the eating culture and the health of children. Some say that prepared seasonings will help overcome this issue. You just need to prepare the basic ingredients, and most dishes could be made with a single pan or a pot. Since special seasonings are ingredients that are difficult to find are already contained in the seasonings, so all you need are the ordinary ingredients that you usually use or that you have in your refrigerator and make a delicious dish. There are types that you cook using the microwave, and this could be used with cooking equipments for microwaves that are

spreading right now.

Dishes that you make by using prepared seasonings are in the middle of a general cooking and already made food. In the time where either already made food or home cooking is growing, prepared seasoning is a product that could strengthen its sales.