

**Voluntary Report** – Voluntary - Public Distribution

**Date:** August 20, 2024

**Report Number:** KS2024-0001

**Report Name:** South Korea Pet Food Report

**Country:** Korea - Republic of

**Post:** Seoul ATO

**Report Category:** Product Brief, Market Development Reports

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**Report Highlights:**

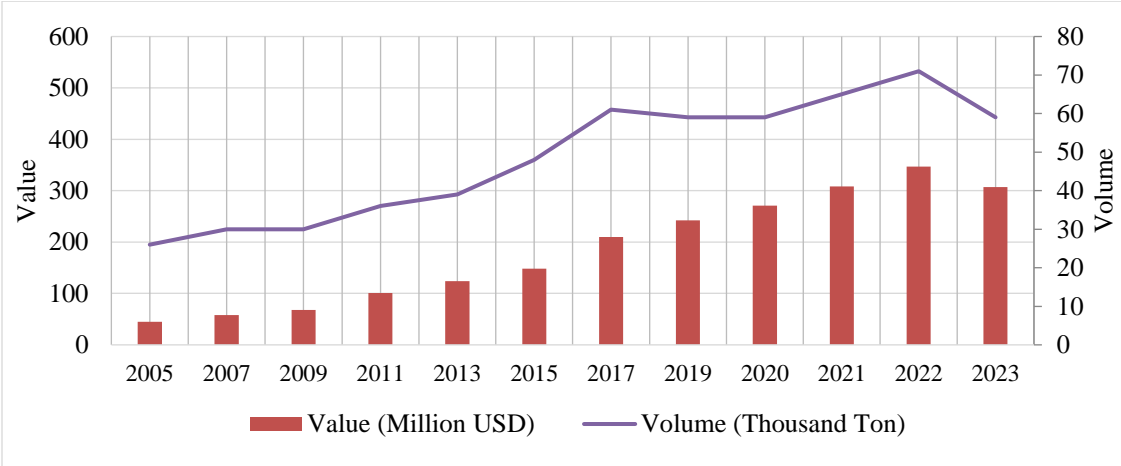
Korea's pet food market has been growing strongly. But, while imported products have traditionally dominated the market, imports declined in 2023 for the first time in over a decade. Local competition likely contributed to the decline in imports. In 2023, the United States was the second largest supplier for imported dog and cat food, with 15.96 and 18.12 percent by of the market by value and volume, respectively. As the pet humanization trend continues, demand for premium products such as pet food with high-quality ingredients will grow further.

**I. KOREA'S PET FOOD SECTOR OVERVIEW**

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF  
AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

In 2023, Korea’s imports of dog and cat food reached 307 million USD with a year-on-year decrease of 11.45 percent. On a volume basis, Korea imported 59,392 tons of dog and cat food, down 16.47 percent from the previous year. This decline in imports is unusual considering the imported pet food sector had consistently seen annual growth in both value and volume for over a decade. The sector has traditionally been led by imported products, holding two-thirds of the market<sup>1</sup>. A consumer survey<sup>2</sup> also indicated that consumers preferred imported pet food (70.5 percent of the respondents) rather than locally produced ones (29.5 percent). However, local companies have been enhancing their pet food businesses, expecting the pet food industry to grow further which appears to have contributed to the decline in imports in 2023.

**Chart 1. Korea’s Dog and Cat Food Import from the World**

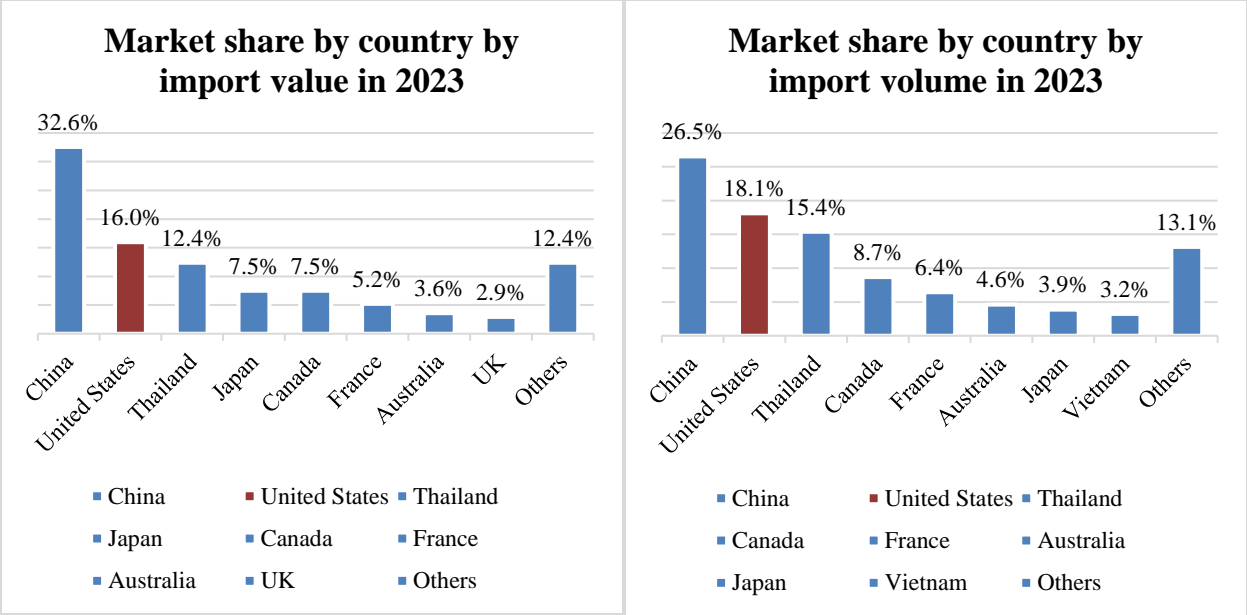


Source: Korean Government Import Data ([www.kita.net](http://www.kita.net), CIF Value<sup>34</sup>)

Korea’s pet food market has grown strongly in recent years. In 2022, the market size<sup>5</sup> for dog and cat food was 1.69 trillion KRW (1,308 million USD<sup>6</sup>) up 71 percent compared to the number from 2017 of 988 billion KRW (874 million USD<sup>7</sup>). The market expansion is expected to continue as more people have pets and are willing to pay more for them. Also, some local companies with human food manufacturing experience are entering the pet food market to tap into the business potential - following the pet food premiumization trend while leveraging their expertise.

**Chart 2. Korea’s Dog and Cat Food Market Share by Country in 2023**

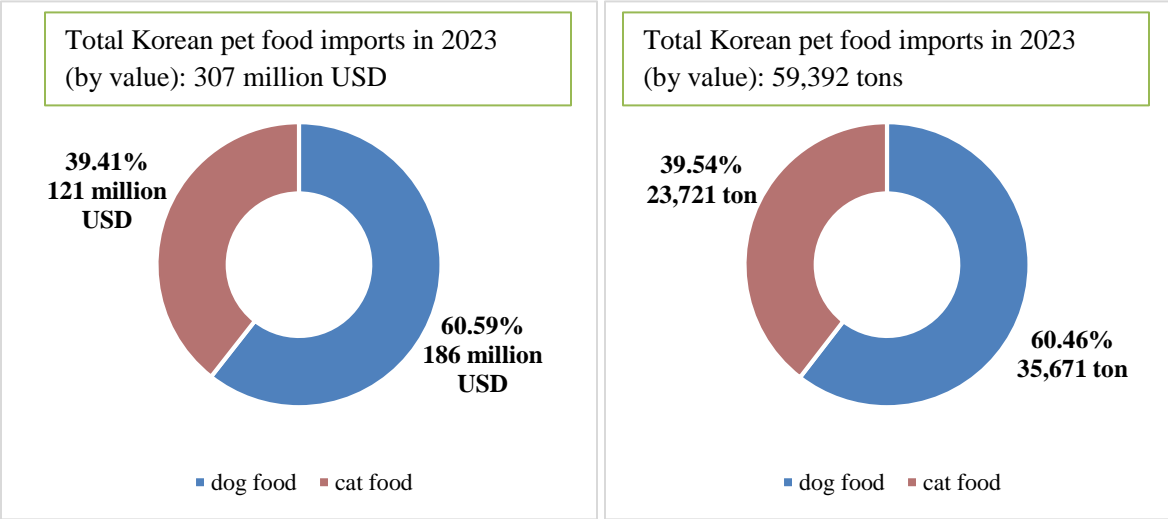
<sup>1</sup> News article by Economic Review, quoting a report released by MAFRA (Ministry of Agriculture, Food and Rural Affairs), in February 2021  
<sup>2</sup> Study on labeling and distribution of pet food in Korea, conducted by Korea Consumer Agency (KCA) in 2021  
<sup>3</sup> CIF is the export price upon arrival in a port in Korea inclusive of insurance and freight cost.  
<sup>4</sup> HS Code 230910: Dog and cat food  
<sup>5</sup> News article by Asia Times, quoting data from Euromonitor, in May 2023  
<sup>6</sup> Calculated at the average exchange rate in 2022 of 1,291.95 KRW/USD  
<sup>7</sup> Calculated at the average exchange rate in 2017 of 1,130.84 KRW/USD



Source: Korean Government Import Data ([www.kita.net](http://www.kita.net))

Chart 2 illustrates key countries from which Korea imports pet food. The top four countries accounted for nearly 70 percent of the sector (68.40% by value, and 68.72% by volume) in 2023. These countries include China with a 32.57 percent market share, the United States with 15.96 percent, Thailand with 12.38 percent, and Japan with 7.49 percent by value. By volume, the first three countries remained the same (26.54 percent, 18.12 percent and 15.38 percent respectively) but the fourth was Canada with 8.68 percent of the market. The ratio of dog to cat food in imported pet food is approximately 60 percent versus 40 percent, as seen in chart 3.

**Chart 3. Korea’s Dog and Cat Food Import by Category in 2023**



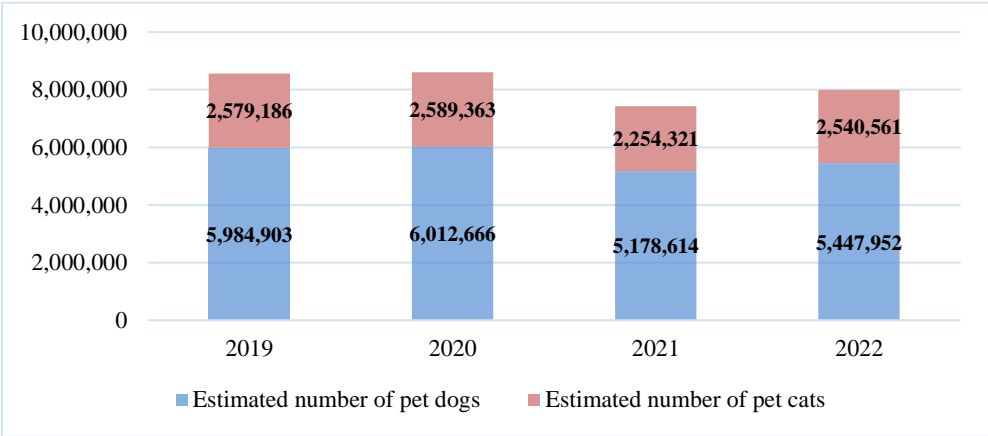
Source: Korean Government Import Data ([www.kita.net](http://www.kita.net))

**II. CONSUMPTION**

According to the results of a survey on public perception of animal welfare, conducted by the Ministry of Agriculture, Food and Rural Affairs (MAFRA) in 2022, 25.4 percent of the survey respondents owned pets<sup>8</sup>. Among the pet owners, 75.6 percent had dogs and 27.7 percent had cats. Fish (7.3 percent) were the third most commonly owned pets. Out of the respondents who owned pets, 61.9 percent had dogs only, and 15.4 percent had cats only. 15 percent had two species or more of pets, and the rest responded they had one pet, which was neither dogs nor cats.

Based on the survey results, the population of those having pets in 2022 is estimated to be 6.02 million households (approximately 1.3 million people<sup>9</sup>). The estimated number<sup>10</sup> of pet dogs and cats was 7.98 million in total in 2022, with the number of dogs (5.45 million) doubling the number of cats (2.54 million)<sup>11</sup>, as indicated in chart 4.

**Chart 4. Estimated Numbers of Pet Dogs and Pet Cats in Korea**

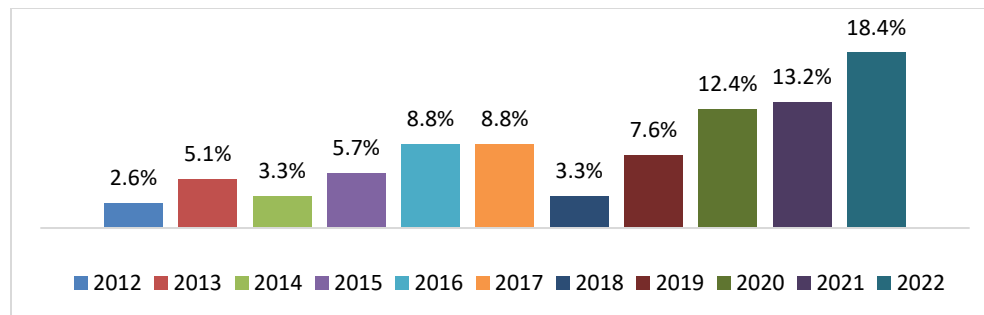


Source: Survey on public perception of animal welfare in 2022<sup>12</sup> (Unit: head)

More people are expected to have pets, and their budgets for taking care of pets are increasing. The reasons behind such increases include 1) more people seek for companionship as an average household size is getting smaller, and 2) more people consider pets as family members and are willing to take the best care of them. The pandemic was another factor that boosted the growing pet ownership. According to a survey<sup>13</sup> conducted by KB Financial Group in 2023, the percentage of respondents who adopted pets increased between 2020 and 2022, compared to previous years. Chart 5 illustrates the percentages of those who responded that they adopted pets each year.

<sup>8</sup> Multiple replies were allowed.  
<sup>9</sup> News article, quoting estimation based on data from MOIS (Ministry of the Interior and Safety of South Korea)  
<sup>10</sup> News article by Asia Economy, quoting statistics of MAFRA, in January 2024  
<sup>11</sup> Please bear in mind that estimation of pet numbers can differ a lot depending on the government agencies conducting surveys each time.  
<sup>12</sup> Survey conducted by MAFRA (Ministry of Agriculture, Food and Rural Affairs) and EPIS (Korea Agency of Education, Promotion & Information Service in Food, Agriculture, Forestry & Fisheries) in 2022.  
<sup>13</sup> Report on Korea pet animals 2023, by KB Financial Group

**Chart 5. Percentages of people adopted pets between 2012 and 2022**



Source: Survey for ‘Report on Korea pet animals 2023’ by KB Financial Group (Unit: Percentage of respondents)

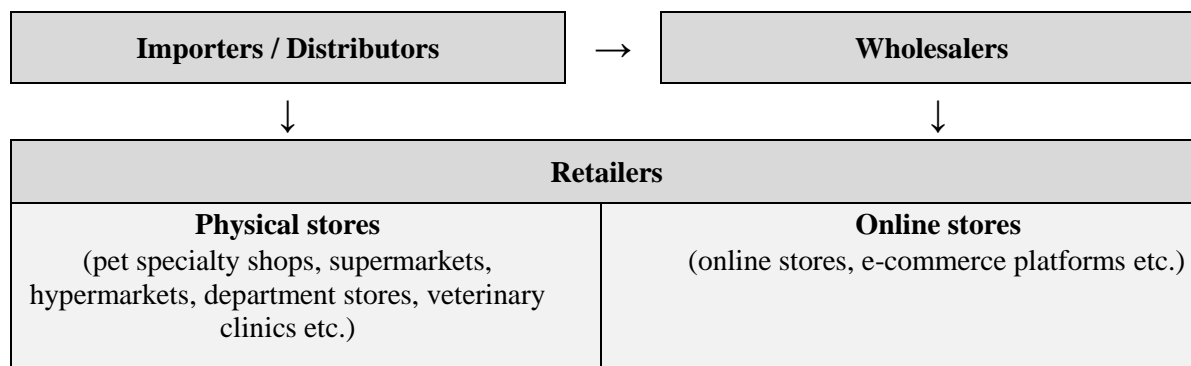
As the trend of pet humanization evolves in Korea, companies are actively showcasing premium products, including human-grade pet food and functional foods to meet the growing demand. The human-grade food refers to food that is clean and safe enough even for humans to consume. Although it is not a term officially authorized by the government or academia, the ‘human-grade’ term is widely noticed by consumers, along with the ‘HACCP’ mark when advertised for pet food. While dry pet food dominates the pet food sector, demand for wet pet food, often considered as more nutritious, is growing along with the expanding trend of premiumization.

Korean consumers predominantly purchase pet food via e-commerce platforms (63.0 percent), followed by pet shops (18.8 percent), hypermarkets (12.1 percent), veterinary clinics (5.4 percent), department stores (0.1 percent), and others (0.6 percent), according to a survey conducted by Korea Consumer Agency (KCA) in 2021.

### **III. MARKET STRUCTURE AND MARKET ENTRY STRATEGY**

Multiple stakeholders are involved when bringing imported pet food to market in Korea. As illustrated in chart 6, importers source pet food products from international suppliers, and the products are transported to warehouses, mostly after customs clearance. Then, the imported pet food products are sold to retailers with physical and/or online stores. In some cases, wholesalers purchase pet foods in bulk and then supply them to smaller retailers who may not have direct relationships with distributors or importers, or who may want to purchase in small quantities.

**Chart 6. Import and Distribution Process of Pet Food Products**



It is important not only to understand distribution channels and market size but also the taste profile and packaging aesthetic preferred by Korean consumers. It may be necessary to modify the recipe or design of the product to better appeal to Korean consumers. Participating in trade shows is a good strategy to obtain hands-on knowledge while showcasing pet food samples, interacting with Korean consumers, and developing contacts with potential business partners.

Korean buyers attend pet food trade shows across the globe including those in the United States, such as [SuperZoo](#) in Nevada. Trade shows in Korea in which U.S. pet food suppliers may consider participating include the November [MEGAZOO](#), which claims to be the largest-scale event in the pet food sector in Korea; it is a merged version of several [K-Pet Fairs](#). There are over 20 of small and medium sized pet shows taking place throughout the country, including ‘[Seoul Pet Show](#)’, ‘[Seoul Cat Show](#)’, ‘[Kanajimo Show](#)’, ‘[GDPP Cat Festa](#)’ in Busan, in Ilsan, at Seoul aT center, at Seoul SETEC, and ‘[K-Pet Fair](#)’ in Dajeon, in Suwon, in Busan, at Seoul SETEC, in Ilsan among others. It is also worth noting that pet food shows in Korea display a relatively stronger emphasis on public interaction, different from business-focused shows in the United States.

It is essential to stay informed on changes in regulations in Korea as they tend to change often with short notice. FAS Seoul provides comprehensive information on the regulations through annually published ‘[FAIRS Annual Country Report](#)’ and ‘[FAIRS Export Certificate Report](#)’. Further guidelines, particularly on pet food, can be found on [the animal health section at APHIS website](#). Additionally, Korean business partners can provide important information on market changes and regulations to U.S. suppliers.

When exporting to Korea, it is strongly advised to prepare all the requested documents, including but not limited to an invoice, a packing list, and an export health certificate, to match the actual products. Discrepancies between the actual products and the document description, such as the name of the product, number of packages, weight, name of vessel or aircraft, and date of shipment, among others, can result in delays or rejection in the clearance process.

Furthermore, U.S. pet food exporters are strongly recommended to note that export health certificates<sup>14</sup> for shipments to Korea must be endorsed before the shipping date. All new-to-market pet food products are subject to mandatory laboratory testing conducted by one of the three laboratories designated by the Ministry of Agriculture, Food and Rural Affairs, which takes up to 10 days. The three laboratories are Korea Feed Association, Korea Feed Ingredients Association and National Agricultural Cooperative Federation. Subsequent shipments of products that have passed their first laboratory testing will be exempt from additional arrival testing for one year.

All animal-origin materials used in pet food must originate from the United States, and this applies to mammalian and avian-origin ingredients, not to fish ingredients. Currently, Korea prohibits imports of pet food containing ruminant-origin proteins (excluding milk, rawhide, and other dairy ingredients) from the United States.

#### **IV. KEY CONTACTS FOR FURTHER INFORMATION**

- **[Agricultural Trade Office \(ATO\), FAS, U.S. Embassy Seoul](#)**  
Phone: +82 2 6951 6848, Email: [atoseoul@usda.gov](mailto:atoseoul@usda.gov)
- **[Agricultural Affairs Office \(AAO\), FAS, U.S. Embassy Seoul](#)**  
Phone: +82 2 397 4297, Email: [agseoul@usda.gov](mailto:agseoul@usda.gov)
- **[Animal Plant and Health Inspection Service Seoul \(APHIS\), U.S. Embassy Seoul](#)**  
Phone: +82 2 725 5495, Email: [yunhee.kim@usda.gov](mailto:yunhee.kim@usda.gov)

#### **Attachments:**

No Attachments.

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<sup>14</sup> The terms 'Export Health Certificate' and 'Veterinary Sanitary Certificate' can be used interchangeably.