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Organic Products Market Brief Update

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Product Brief

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Report Highlights:

As the wellbeing trend is set to become even more prominent in Korea – U.S. Equivalency Agreement (KORUS EA) implementation since July 2014, the prospects for imported organic food seem very bright. The Korean organic foods market, including fresh produce, field crops, and imported processed food has shown strong growth over the last several years. The total market for imported organic food was $78.6 million in 2013 at CIF prices, an increase of 14 percent compared to the previous year. However, new organic import regulations went into effect on July 1, 2014 as an implementation of Korea – US Equivalency Agreement and this may lead to a dramatic increase of imported organic processed products. Only about 10 percent of the organic products found in the Korean market are imported processed products while over 80 percent are manufactured in Korea using imported organic ingredients.

General Information:

SECTION I. SUMMARY

The Korean organic foods market, including fresh produce, field crops, and imported processed food has shown strong growth over the last several years. The total market for imported organic food was $78.6 million in 2013 at CIF prices, an increase of 14 percent compared to the previous year. However, new organic import regulations went into effect on July 1, 2014 as an implementation of Korea – US Equivalency Agreement (KORUS EA) and this may lead to a dramatic increase of imported organic processed products.

The organic market has done well in Korea because consumers are very health conscious and increasingly greater disposable incomes have led to more purchases by a larger segment of the population. Consumers worry about food safety and issues such as GMOs, BSE, AI and trans fats that are often mentioned in the media that leads to a greater interest in organic foods.

The majority of processed organic product offerings are imported brands that are sold in specialist channels such as ecofriendly-organic shops and health food shops as well as food corners in department stores. Only about 10 percent of the organic products found in the Korean market are imported processed products while over 80 percent are manufactured in Korea using imported organic ingredients. Nevertheless, as the wellbeing trend is set to become even more prominent in Korea with KORUS EA implementation since July 2014, the prospects for imported organic food seem very bright. Korean Ministry of Agriculture, Food and Rural Affairs (MAFRA) has established a 'Processed Organic Food Industry Countermeasure for Activation' and starts to push ahead from 2015. The target is $1 Billion sales including about 2 percent export of processed organic foods in 2020.

Table 1. Advantages vs. Challenges

Advantages	Challenges
Local production of processed organic products with domestic input is negligible.	Lack of knowledge of varieties of processed organic products in U.S. As a result, the variety of products is very similar from store to store in Korea.
Implementation of Korea-US Equivalency Agreement for Organic Processed Food encourages imports since July 2014.	Imports of organic products are usually purchased in consolidated shipments and importers lack information about U.S. organic product consolidators.
Korea imports 60-70 percent of total food and feed needs which includes most of ingredients for locally manufacturing organic processed food.	Third-country competitors are more aggressive and supportive toward Korean importers' supply demands.
Tariffs for processed organic products are relatively low and favorable by the Korea-US FTA implementation since March 2012.	U.S. exporters of organic products tend to be smaller suppliers with little international experience and little knowledge of the Korean market. In addition, many U.S. suppliers do not view the Korean market as an opportunity.
In general, consumers trust the USDA label. Koreans prefer the taste of U.S. organic foods to those from our competitors.	Fresh food sector is almost completely dominated by the domestic producers.
Consumers are increasingly aware of organic products and the demand is growing as health concern is expanding.	The shelf-life of imported organic processed products is very short and the products are difficult to sell. As a result, the products are priced 200-400 percent higher than conventional counterparts.

Table 2: Imports of Organic Processed & Unprocessed Agricultural Products by Year

Unit: Metric Tons (MT), Million (M)

Year		2008	2009	2010 (from U.S.)	2011 (from U.S.)	2012 (from U.S.)	2013 (from U.S.)
Imports Cases	Un processed	250	286	263	376 (45)	388 (58)	357 (80)
	Processed	3.629	2,613	3,728	3,798 (1,246)	4,137 (1,210)	3,820 (1,327)
	Total	3,879	2,899	3,991 (1,103)	4,299 (1,307)	4,525 (1,268)	4,177 (1,407)
Imports Weight (MT)	Un processed	7,300	5,600	7,060	8,195 (361)	9,653 (333)	7,974 (160)
	Processed	18,100	13,700	18,413	20,646 (3,457)	19,903 (4,099)	21,589 (3,273)
	Total	25,400	19,300	25,473 (3,417)	28,841 (3,818)	29,556 (4,432)	29,563 (3,433)
Imports Value ($ Mil)	Un processed	$7.4M	$7.6M	$10.7 (1.6)	$13.8 (2.1)	14.5 (1.7)	16.8 (1.8)
	Processed	$49.3M	$28.2M	$38.7 (11.4)	50.7 (13.6)	54.5 (16.5)	61.8 (15.6)
	Total	$56.7M	$35.8M	$39 (13)	64.5 (15.7)	69.0 (18.2)	78.6 (17.4)

Source: Ministry of Food & Drug Safety (MFDS) 2014

Note: Based on CIF Price. In general, the retail market price is 2.5-3 times higher than the CIF price.

Koreans perceive organic, low-chemical or other "natural" products as healthy products in line with the recent trend in Korea focusing on the so-called "well-being" lifestyle. As a result, the market for organic and "natural" foods is a segment that has been developing rapidly. Korean consumers also like natural, fresh food products, such as health foods, functional foods and diet foods. Koreans have always looked to their food to provide a functional or health benefit and additionally, foods made without the use of pesticides or insecticides appeal to Korean consumers.

Table 3: Processed Organic Products Market Prospect (Unit: $Million)

	2008	2011	2012	2015	2020	2025
Total	215.8	377.7	435.5	578.1	681.7	712.9
Local Production	184.3	321.9	371.2	493.7	586.7	616.7
(Only Local Ingredient)	29.6	48.0	54.9	79.0	120.3	143.9
(Only Imported Ingredient)	154.7	273.9	316.2	414.7	466.3	472.7
Finished Products Imports	31.5	55.8	64.4	84.4	95.0	96.3

Source: Food Distribution Year Book 2012, Korea Rural Economy Institute (KREI)2011

SECTION II. REGULATIONS AND POLICY

Organic Food

On June 1, 2012, Ministry of Agriculture, Food and Rural Affairs (MAFRA) and the National Assembly fully revised the Act on the Management and Support for the Promotion of Eco-Friendly Agriculture/Fisheries and Organic Foods (New Organic Act) by combining two existing Acts, the Environment-Friendly Agriculture Promotion Act and the Food Industry Promotion Act, after lengthy discussion on the two proposed bills, which were comprised of differing opinions on several issues including the scope of an equivalency agreement. The new Act, which was fully implemented on June 1, 2013, all domestic and imported organic produce and processed products were required to be certified by a MAFRA-accredited certifying agent. However, in lieu of certification by accredited certifying agents, the Act allowed MAFRA to have an equivalency agreement on processed organic products with foreign trade partners, which went into effect on January 1, 2014.

There was an agreement for Korea-US Organic Equivalency Agreement on behalf of processed organic products on July 1, 2014 as well as the same day of effectiveness. You may find for further information on the Agreement:
http://www.ams.usda.gov/AMSv1.0/getfile?dDocName=STELPRDC5108176

You may find more information on US-Korea Organic Equivalency Arrangement via this report on Food & Ag Import Regulation and Standards **(FAIRS GAIN Report KS1453)**

US-Korea Organic Equivalency Arrangement

The United States and Korea reached an equivalency arrangement on processed organic food products on July 1, 2014. Under the arrangement, as long as the terms of the arrangement are met, certified organic processed products in the U.S. may be sold as organic in the Korean market and display the Korean organic logo, and vice versa for Korean products. The scope of the arrangement is as below:

Beginning July 1, 2014, the arrangement covers products which:

- Are certified to the USDA or Korean organic regulations
- Are "processed products" as defined by the Korean Food Code
- Contain at least 95% organic ingredients
- Have their final processing(as defined in the Korean Food Code) occurs in the U.S. or Korea
- U.S. products: do not contain apples or pears produced with the use of antibiotics
- Korean products: do not contain livestock products produced with the use of antibiotics

For U.S. processed organic products exported to Korea must be accompanied by the National Agricultural Products Quality Management Service (NAQS) Import Certificate of Organic Processed Foods that includes the statement "Certified in compliance with the terms of the U.S. – Korea Organic Equivalency Arrangement." Also, a copy of USDA/NOP organic certificate shall be submitted for import inspection in Korea. Details about the certificate, labeling, etc. are available from the following link:
US-Korea Organic Equivalency

MAFRA's Certification and Labeling Requirements for Processed Organic Foods Not Covered by Equivalency

The Act on the Management and Support for the Promotion of Eco-Friendly Agriculture/Fisheries and Organic Foods (New

Organic Act) requires all domestic and imported organic processed products other than those covered by the equivalency to be certified by a MAFRA-accredited certifying agent. (Each product is required to get an organic certification in order to be sold as organic in Korea following the procedures listed below:

Certification Procedures for Organic Producers

Application for certification: A person who desires certification should apply to a certifying agency using the form in Attachment 3 of the Enforcement Rule of the New Organic Act accompanied by a copy of a food item manufacturing report, an organic handling plan, etc.

1. Documentation review: Once the documents have been submitted, the certifying agency reviews the documents to determine whether the content of the documents is in compliance with the standards set forth under the New Organic Act. If any non-compliance is identified during the review, the applicant is notified of the fact and requested to correct the non-compliance.
2. On-site inspection: If no problems are identified during the document review, the certifying agency sends inspectors to the applicant's production facility. An inspector should not have a conflict of interest with regard to the certification of the applicant. He or she conducts the evaluation based on objective facts to determine whether the organic handling system of the applicant's production facility complies with the standards set forth under the New Organic Act and then prepares a report on the results of the review.
3. Certification decision: Once the review report is submitted, the certifying agency takes into consideration the review report and all other relevant information from the applicant.
4. Certificate issuance: If the applicant is determined as having an organic handling system in compliance with the standards set forth under the New Organic Act at his/her production facility, the certifying agency issues a certificate. In the case of non-compliance, the applicant will be notified and another review will be conducted after corrections have been made. Depending on the severity of the non-compliance, other actions may be taken.
5. Annual inspections: After issuance of a certificate, the applicant's production facilities will need to be regularly inspected at least once every year. The procedures are the same as those of the initial certification. Two months before the validity of the certification expires, the applicant should submit a regular inspection application (using the form in Attachment 2 or 3 of the Enforcement Rule of the New Organic Act) with required documents to the head of the certifying agency.

To date, 14 Korean certifying agencies and four foreign certifying agencies have been accredited by NAQS for certification of organic processed food products. To date, no U.S. certifier has been accredited.

MAFRA's Labeling Regulations for Organic Agricultural Products

Under the Act on the Management and Support for the Promotion of Eco-Friendly Agriculture/Fisheries and Organic Foods (New Organic Act) an organic certification issued by Korea's accredited certifying agents is required for both fresh (unprocessed) produce and livestock products. The certification for organic produce is classified into two categories: organic and no-pesticide. For livestock products, two categories of certification are available: organic livestock and non-antibiotic livestock.

Organic agricultural produce and livestock products complying with the U.S. organic standards or international standards still require certification from a NAQS-accredited certification agency. The overall certification process is the same as shown above for processed organic products.

SECTION III. CONSUMPTION AND MARKET SECTORS

A.Consumption

Health and wellness is the main focus of the public and eating healthier foods has definitely increased. A recent survey indicated that about 60 percent of consumers purchased organic products due to concerns about their health and food safety. The trend can be seen in all food sectors, including fresh foods, packaged foods, and food service establishments.

In Korea, the population is rapidly aging and elderly consumers consider healthy eating to be a top priority. In the 50-60 year age group, home shopping channels and internet sales are growing faster than off-line shopping. Early seniors seem to be more interested in eating healthy foods and combined with a greater understanding on how to use the internet to shop for food; this segment may become a major purchaser of organic products in the future.

The age group with the most buying power for organic products is the late 30 to early 40 year old age group who earns and estimated $9,000 per month and spends about an average of $70 every time they go shopping on organic foods. They mostly shop at high end department stores and specialty shops.

Market Sectors

1. Organic Packaged Food Market in Korea

In Korea, a product must have an organic ingredient content of over 95% in order to obtain organic certification. For example, packaged food only needs to contain 75-90% organic ingredients in order to justify the use of 'organic'. However, different guidelines are applied regarding the use of the word 'organic' in packaging. Only when a product wants to state '100% organic,' does it need to be made of 100% organic ingredients.

Imported organic packaged food is also available in the market. Based on Korean government certification standards regarding organic packaged food, over 300 overseas institutions evaluating 'organic' certification are acceptable as 'organic' packaged food within Korea. Regional governments and the Korea Food and Drug Agency monitor safety issues for example, whether a certain imported organic packaged food contains any foreign object or banned additives or not.

Large packaged food manufacturers have been hesitant to introduce organic packaged food as it is hard to satisfy different preferences and they instead need to concentrate more on broader consumers who are still more focused on pricing. Even if demand for organic packaged food is increasing, higher retail prices represent a barrier to attracting more consumers.

Organic packaged food current value sales increased by 8% in 2013 to reach $130 million. From the point of view of manufacturers, it was beneficial to introduce organic packaged food and expand product items. The steadily recovering economy in Korea also boosted organic packaged food sales. More consumers are showing an interest in organic packaged food by a result of a series of food safety issues and increasing concerns about personal well-being.

The rise of organic packaged food can also be attributed to the increasing number of retailers selling organic and naturally healthy packaged food. On the other hand, membership based specialized retailers like Hansalim, ICoope Saenghyup, or JayeonDream are boosting sales of organic packaged food in Korea. Major retailing channels like hypermarkets and supermarkets have been hesitant to prepare specialized organic packaged food zones for consumers. Instead, displays continue to be dominated by ordinary packaged food. This kind of retailing channel is increasing steadily and more consumers are purchasing products from such companies.

Table 4: Sales of Organic Packaged Food by Category (Unit: $1,000)

Organic	2010	2011	2012	2013
Baby Food	4,886	4,578	4,439	4,366
Bakery Products	832	874	922	966
Confectionery	4,504	4,549	4,643	4,759
Dairy	39,210	46,787	53,017	59,147
Oils and Fats	6,623	6,847	7,023	7,147
Rice	34,586	37,353	40,155	42,970
Sauces	5,271	5,745	6,205	6,670
Spreads	3,943	4,022	4,070	4,152
Packaged Food	99,855	110,756	120,473	130,178

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Locally Manufactured Organic Packaged Food in the Market as Competitors

Maeil Dairies introduced organic baby snacks consisting of six different tastes, a new version of organic cheese for kids and ready meal organic oatmeal. As a leading dairy product producer in Korea, Maeil Dairies introduced organic products prior to other competing brands. Maeil Dairies led sales in 2013, recording a value share of 31%. For instance, the company's baby meal brand, 'Mamamil', added organic products in 2002 for the first time in Korea while its premium Sangha brand built organic line-ups systematically prior to other brands. In 2013, the company introduced a new version of its baby formula, 'Maeil Masterpiece' and organic baby snack, organic baby cheese etc. By adding new premium products, the company intended to convey a reliable brand image to existing and potential consumers.
Daesang Corporation introduced organic dressings in 2013 with four different flavors. The company ranked second in 2013 thanks to its stronger position within organic sauces, dressings and condiments in Korea. The company's 'OFood' brand was introduced in 2004 and offers organic sauces, dressings and condiments. Even if retailing price is 30% higher than that of ordinary packaged food, the company is planning to sustain this specialized organic brand in order to meet increasing demand for organic packaged food.

Most organic packaged food manufacturers are small and medium sized companies established by regional farmer cooperatives or regional governments. As they could supply safe and stable raw materials nearby, they could save time or cost more than large manufacturers. As a result, small and medium sized manufacturers have been introducing more diversified products for potential consumers. The fact that the main retail channel is specialized naturally healthy and organic packaged food market.

Prospects

Regardless of higher retailing price, more consumers are purchasing organic packaged food for their health and personal well-being. Organic packaged food has a positive outlook of 5% value increase due to increasing demand for safe and qualified food among consumers in these years.

According to the Korean government, organic packaged food should contain over 95% organic ingredients. However, with regard to the printing of the word 'organic' on packaging there is a different guideline. It is impossible to print 'organic 100%' on packaging if a product does not contain 100% organic raw ingredients. Packaged food containing 75-90% organic raw ingredients should not use the word 'organic' on packaging.

Table 5: Sales Prospects of Organic Packaged Food by Category (Unit: $1,000)

Organic	2013	2014	2015	2016	2017	2018
Baby Food	4,366	4,243	4,145	4,071	4,018	3,981
Bakery Products	966	986	1,009	1,037	1,068	1,103
Confectionery	4,759	4,764	4,793	4,841	4,904	4,977
Dairy	59,147	63,493	67,705	71,723	75,311	78,547
Oils and Fats	7,147	7,227	7,312	7,399	7,488	7,579
Rice	42,970	45,763	48,509	51,177	53,758	56,154
Sauces	6,670	6,944	7,200	7,438	7,654	7,838
Spreads	4,152	4,168	4,181	4,189	4,194	4,194
Packaged Food	130,178	137,588	144,854	151,875	158,371	164,372

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

2.Organic Beverages in Korea

Due to a lack of awareness, a large proportion of organic products are imported brands that are mostly sold through premium supermarkets or health and wellness specialists. Organic beverages have only been available for a short period of time and are mostly positioned as premium products with considerably higher retail prices. As a result, products in this category are mostly produced by smaller players.

Korean economic stagnation has affected overall consumption trends for locals and is a major reason for the slow-down of growth. Even though, younger mothers in Korea are known to be very particular about foods for their children and form a major group of consumers for organic foods and beverages in general. Organic beverage market potential is considered to be unstable under the current economic environment.

While organic juices are the only area with a sizable market, new products were launched within RTD tea during the year. One of niche and very small area, organic beverages continued to record positive growth in 2013. Woongjin Food added a new product called Organic Sky Barley for Kids in May. The company's Sky Barley has been a hit brand for many years and the addition is intended to expand its consumer base to include children. Kwang Dong Pharm also introduced a new type of Lemon Green Tea which is made from organic green tea grown in Jeju Island. Furthermore, the company has invested in acquiring farming lands in Jeju Island to grow healthy agricultural goods.

Growth in 2013 was slower than expectation, organic juices has recorded impressive growth since 2008, although the absolute size of the area is still minimal compared with juices overall. Many organic juice products are specifically targeted at young children and emphasis the health benefits of their ingredients as they relate to the required nutritional components for growing children. As organic beverages command a premium price, consumption is limited to more affluent consumers and mothers with young children.

Competition

Nokchawon is the leading manufacturer in organic green tea, account for 37% of value sales in 2013. The company leads overall organic beverages sales since organic green tea accounted 63% of total organic beverages current value sales in 2013. Nokchawon specializes in tea products and as organic soft drinks growth is picking-up, the sales share of Nokchawon may be diluted in the near future.

The presence of leading brands and companies is limited within organic soft drinks. The area is highly fragmented between multiple brands and it is difficult to gauge the performance of particular brands.

Due to a limited market and the highly premium nature of existing brands, there are no private label products or active promotional efforts visible for specific brands in this area.

Prospects

As an organic beverage develops further, new trends may be seen, even though unit prices will generally increase within organic beverages category. Premium areas such as organic beverages will be sustained by demand amongst a group of consumers prepared to spend more for extra value. However, as disposable incomes are limited among local consumers, the expansion of consumption outside this group will be difficult to achieve within near future.

Active new product launches are expected in the near future. The slow-down in growth within green tea has affected organic green tea. While organic green tea sales are still increasing, the rate of growth is not as significant. New products launched by major players in 2013 were confined to RTD tea, where retail prices are relatively reasonable due to a low content of local ingredients.

Supported by high interest in health and wellness among local consumers, organic beverages will record positive growth over the coming years. However, the rate of growth is expected to slow down gradually as economic prospects are not bright enough to support a booming market.

Table 6: Sales of Organic Beverages by Category (Unit: $1,000)

	2010	2011	2012	2013
Organic Hot Drinks (Organic Tea & Green Tea)	2,773	2,828	2,879	2,914
Organic Fruit/Vegetable Juice (100% Organic)	1,397	1,499	1,580	1,650
Organic Beverages	4,170	4,328	4,460	4,564

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 7: Distribution of Organic Beverages by Format (Unit: % of retail value)

	2010	2011	2012	2013
Store Based Retailing	90.9	90.7	90.4	90.5
• **Hypermarkets**	35.6	36.9	38.4	37.7
- **Supermarkets**	18.4	17.4	16.3	16.8

• **Convenient Stores**	7.0	7.3	7.7	7.5
• **Independent Small Grocers**	23.7	23.5	23.0	23.3
• **Forecourt Retailers**	0.3	0.3	0.2	0.2
• **Other Grocery Retailers**	5.8	5.2	4.7	4.9
• **Non-Grocery Retailers**	0.1	0.1	0.1t	0.1
Non-Store Retailing	9.1	9.3	9.6	9.5
- **Internet Retailing**	8.8	9.0	9.4	9.2
- **Direct Selling**	0.3	0.3	0.2	0.3

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 8: Forecast Sales of Organic Beverage Food by Category (Unit: $1,000)

Organic	2013	2014	2015	2016	2017	2018
Hot Drinks (Tea & Green Tea)	2,914	2,888	2,850	2,799	2,737	2,669
Soft Drinks (100% Fruit/Vegetable Juice)	1,650	1,691	1,730	1,765	1,795	1,822
Beverages	4,564	4,579	4,580	4,564	4,532	4,491

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

SECTION IV. PROMOTIONAL ACTIVITIES

Currently, there is one major show supported by ATO Seoul in Korea. **The Food & Hotel Korea 2015** (www.oakoverseas.com) will be held in Ilsan in the suburbs of Seoul, May 12-15, 2015. The show presents an excellent chance to explore possible market opportunities in Korea. This show is a trade only show and targets importers, wholesalers, distributors, retailers, hotels, restaurants, food processors, media, etc. It is the only "trade only" show in Korea. All other shows cater mostly to consumers. Another being considered is the **Café Show 2015** (www.cafeshow.co.kr) will be held in COEX in Seoul, November 12-15 2015. We believe this show may be another trade outlet to reach consumers willing to pay for special foods like organic.

Many Korean importers attending these shows are looking to establish reliable long-term trading relationships. Another way of finding potential importers is to participate in a local food show to showcase your products to a larger audience. Show participation enhances initial contacts with importers, agents, wholesalers, distributors, retailers and others in the food and beverage industry.

SECTION V. POST CONTACT AND FURTHER INFORMATION

For further information about the Korean agricultural market, please contact:

U.S. Agricultural Trade Office
Korean Address: Room 303, Leema Building
146-1, Susong-dong, Chongro-ku, Seoul, Korea
U.S. Mailing Address: U.S. Embassy Seoul, Unit 15550-ATO, APO, AP 96205-5550
Telephone: 82-2-6951-6848 Fax: 82-2-720-7921
E-mail: atoseoul@state.gov
Website: www.atoseoul.com

Agricultural Affairs Office
Korean Address: U.S. Embassy, 82, Sejong-ro, Chongro-ku, Seoul, Korea
U.S. Mailing Address: U.S. Embassy Seoul, Unit 15550-AgAff, APO, AP 96205-5550
Telephone: 82-2-397-4297 Fax: 82-2-738-7147
E-mail: agseoul@state.gov

For more information on how you can register for USDA/FAS' Supplier List:
The United States Department of Agriculture's Foreign Agricultural Service (USDA/FAS) offers information and services that can be beneficial to both new and experienced exporters. For example, the U.S. Suppliers Service is a searchable database of over 5,000 U.S. exporters and their products, which is used by USDA/FAS to help facilitate connecting potential buyers with U.S. suppliers. This database is used by more than 85 USDA FAS Overseas offices to help export agents, trading companies, importers and foreign market buyers locate U.S. suppliers. It is also used to recruit U.S. exporters to participate in market development activities sponsored by USDA and federal export programs.

You can register online for this service at
http://www.fas.usda.gov/agexport/exporter.html

AgConnections Team
AgExport Services Division, Foreign Agricultural Service, Washington, D.C.
Telephone: 202-690-4172 Fax: 202-205-2963
E-mail: joyce.estep@usda.gov
Website: www.fas.usda.gov/agx/agx.html

For information about activities by Strategic Trade Regional Groups, please contact:

Food Export Association of the Midwest USA
309 W. Washington St., Suite 600
Illinois 60606
Telephone: 312-334-9200 Fax: 312 334-9230
E-mail: thamilton@foodexport.org
Website: www.foodexport.org

Western United States Agricultural Trade Association (WUSATA)
2500 Main Street, Suite 110, Vancouver, WA 98660-2697, USA

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Website: www.susta.org

SECTION VI. OTHER RELEVANT REPORTS

You may find more information on Korean market reports at www.atoseoul.com:
Such as 1. Exporter Guide Annual 2014   2. Retail Food Sector Biannual Brief
3. FAIRS Country Report 2014