

Voluntary Report – Voluntary - Public Distribution

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Report Name: New Market Opportunities Open for US Potatoes in 2026

Country: Korea - Republic of

Post: Seoul

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Report Highlights:

In 2026, U.S. potatoes will enjoy expanded access to the Republic of Korea (ROK) market thanks to the addition of 11 new export-eligible states and the phase-out of seasonal tariffs on chipping potatoes. In January, the Animal and Plant Quarantine Agency (APQA) approved market access for U.S. chipping and table stock potatoes from 11 additional states (Arizona, California, Colorado, Maine, Michigan, Minnesota, Montana, Nebraska, New Mexico, North Dakota, and Wisconsin), a milestone the USDA Animal and Plant Health Inspection Service (APHIS) has worked toward since 2007. Combined with the elimination of seasonal tariffs under the U.S.-Korea Free Trade Agreement (KORUS) in 2026, U.S. potato exports to the ROK are poised to grow from 2025's total of \$12.8 million.

ROK Finalizes Market Access Expansion for Fresh U.S. Potatoes

On January 23, 2026, APQA, under the Ministry of Agriculture, Food and Rural Affairs (MAFRA), announced a notification on the exclusion criteria for the import ban on U.S. potatoes among prohibited plant imports ([APQA Notice No. 2026-6](#)). Following the agreement between each country's phytosanitary authorities, APQA revised the import quarantine requirements to include fresh potatoes from 11 U.S. states, in addition to the existing 3 U.S. states (Idaho, Washington, and Oregon). With the implementation of this notification, potato farms located in the following 11 U.S. states can now export fresh potatoes (table and chip stocks) to the Korean market:

Regions	Eligible United States
Western and Southwestern U.S.	Arizona, California, Colorado, Montana, New Mexico
North Central U.S. and Great Lakes	Michigan, Minnesota, Nebraska, North Dakota, Wisconsin
Northeastern U.S.	Maine

Source: APHIS & APQA

The revised notification includes a separate chapter outlining enhanced import quarantine requirements for chipping and table stock potatoes, including export facility registration, seed potato certification, application of integrated pest management methods, etc.

Interested potato exporters from these new states can contact the relevant APHIS export specialist for their region at <https://www.aphis.usda.gov/plant-exports/certification>; or APHIS phytosanitary export database (PExD) at <https://pcit.aphis.usda.gov/pcit/faces/signIn.jsf>.

Additionally, potato exporters may work with FAS Seoul and the Potatoes USA Korea office for information on potential importers and trade opportunities in the Korean market. Please contact FAS Seoul at AgSeoul@usda.gov.

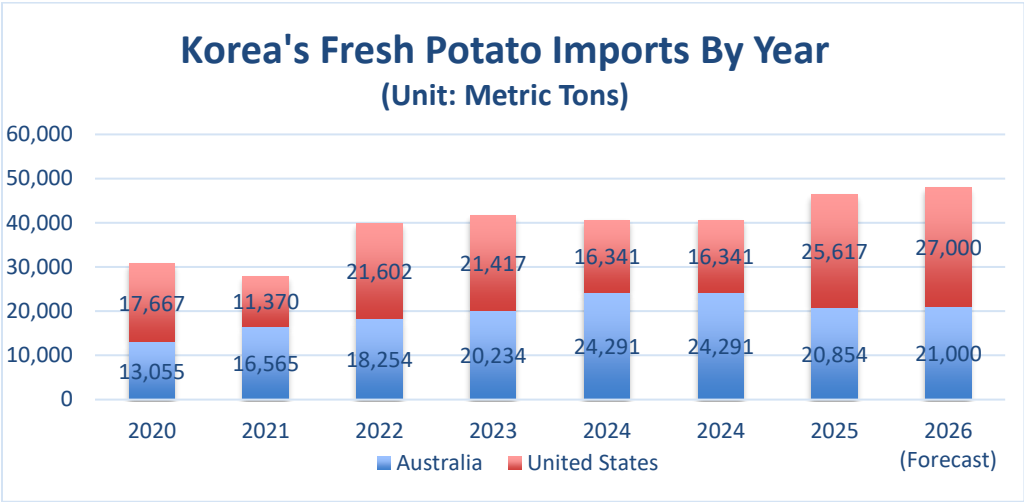
Market Access Expansion to Bump U.S. Exports

In 2026, FAS Seoul forecasts total ROK fresh potato imports will reach approximately 48,000 metric tons (MT) due to the addition of 11 U.S. states and phase-out of seasonal chipping potato tariffs. Of total imports, U.S. potatoes are expected to account for approximately 27,000 MT. In the coming years, post expects U.S. volumes to increase gradually depending on the quality and availability of potatoes from the 11 new states, especially California.

Since 2020, the export volume of U.S. fresh potatoes to Korea has varied from 11,000 to 25,000 MT annually, valued at \$9-\$16 million. A combination of tariff-related and phytosanitary restrictions has constrained total export volumes to Korea; these measures include a tariff rate quota (TRQ) limiting table stock potatoes, seasonal tariffs on chipping potatoes (phased out in

2026), and limited state export eligibility. Fresh U.S. potatoes represent approximately half of Korea’s \$30-34 million imported fresh potato market, indicating significant growth potential. By contrast, total U.S. processed potato product exports to the Korean market exceed \$150 million annually, with a 5-year average market share of 45 percent.

Graph 1
Annual Fresh Potato Imports by Origin



Source: TDM & FAS Seoul Forecast

Chipping Potatoes

Korea's fresh potato imports are primarily for chip processing. Until 2026, seasonal tariffs under KORUS restricted domestic chip processors' use of U.S. fresh potatoes. However, with the full phase-out of the KORUS seasonal tariffs starting in 2026 (year 15 of the agreement), U.S. fresh potatoes for chip processing are now allowed year-round with zero duty.

Korea's annual consumption of fresh potatoes for chips is approximately 70,000 tons, of which about 30,000-40,000 tons are supplied to processors through contract farming of domestic potatoes. Imported fresh potatoes are mainly from the United States and Australia and have been primarily used from November through May or June of the following year, during the off-season for domestic potatoes.

In recent years, deteriorating domestic potato yields due to increasingly frequent climate anomalies and reduced supply from farmers switching to other crops have increased demand for imported fresh potatoes, including U.S. potatoes, and market share is expected to continue rising. Korea's potato chip processing industry is dominated by three major companies (Orion, Haitai, and Nongshim), and each company is expected to continue increasing its use of imported fresh potatoes to maintain chip processing production facilities amid domestic production challenges. With the expanded market access for 11 new states, combined with the seasonal tariff phase-out, U.S. potatoes are now poised to capitalize on increased demand from the chipping sector.

Local industry sources suggest that states offering a complementary harvest season to the existing fresh potato supply regions in the Pacific Northwest will be most competitive in securing new processing potato supply contracts. Among the 11 newly added U.S. states, California-based potato farms are expected to benefit initially due to their geographic proximity and lower logistics costs. However, 2026 import volumes are expected to be limited to small quantities for quality testing purposes. This is because contracts needed to be finalized by December of the previous year to import California potatoes.

Table Stock Potatoes

U.S. table stock potatoes (those not for chip processing) remain limited by a TRQ under KORUS, with only a certain annual quantity permitted for duty-free import and no phase-out date. The import quota for 2026 is 4,538 metric tons (see Table 1), and this volume increases indefinitely by 3 percent annually. Although the out-of-quota tariff is 304 percent, historically, the U.S. table stock potato quota has not been fully allocated, indicating there is still room to grow this category of U.S. potato exports at zero duty. As of mid-June, 56 percent of the 2026 U.S. table stock potato quota remained unallocated, and only 31 percent has been filled according to customs clearance data. With the expansion of eligible states, high quality and diverse potato varieties could provide Korean consumers with more choices.

The ROK allocates the table stock TRQ through an import rights auction managed by the Korea Agro-Fisheries and Food Trade Corporation (aT). For more information on the allocation process, interested exporters may contact FAS Seoul at AgSeoul@usda.gov.

Table 1
Fresh Potato Import Duties under KORUS

	Chip Stock	Table Stock
Structure	<i>Seasonal duty with 15-year phase-out</i>	<i>Indefinite TRQ</i>
2025 Tariff Rate	12/1 – 4/30: 0 percent 5/1 to 11/30: 38 percent	In-quota: 0 percent Out-of-quota: 304 percent
2026 Tariff Rate	Year-round duty-free treatment	In-quota: 0 percent Out-of-quota: 304 percent
Quota	Unlimited	4,538 MT in 2026 increases by 3% per year
Phase-Out	2026 (15 th year of KORUS)	None

Source: Korea-U.S. Free Trade Agreement

Attachments:

No Attachments.