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Country: Korea - Republic of

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Report Category: Market Promotion/Competition

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Report Highlights:

In 2024, the market size of the Republic of Korea (ROK)'s health function food industry reached 5.07 trillion Korean won (3.7 billion dollars). Among this, imported products took up 28.4 percent, and American products accounted for 43.4 percent, the largest share of those imports. Korean consumers highly value products' functionality, safety, and brand credibility, and American products are recognized for their strengths in these factors. As income levels continue to rise, Korean consumers' demand for health-focused products is expected to steadily grow, presenting excellent business potential for U.S. suppliers.

Section I. Market Summary

Health Functional Food (HFF) refers to foods manufactured and processed in various forms, such as a capsule, a pill, and liquid, with ingredients and components beneficial to the human body, based on the Health Functional Food Act of the Republic of Korea (ROK). The ROK's HFF industry has rapidly expanded over the past decade, becoming prevention and healthcare focused, shifting from its past focus on supplementing nutrition.

According to 'Food Production Performance in 2024' released by the Ministry of Food and Drug Safety (MFDS), in 2024, the market size of the ROK's HFF industry reached 5.07 trillion Korean won (3.7 billion dollars¹).

During the COVID-19 pandemic (2019-2021), growth accelerated as interest in improving immune system and managing fatigue strengthened. While the sector appears to have stabilized, consumer demand has broadened in various functional areas including overall health, inner beauty, sleep, and stress management.

Imported products consisted of about 30 percent of the market, in which the United States led the sector with the largest market share (over 43 percent). The key consumer segment has expanded to adults (in 20s-40s) and children from the typical key segment of adults in their 50s. Like many other consumer products, online distribution has become a dominant sales channel for the HFF sector as well.

Section II. Health Functional Food (HFF) Industry

In the ROK, HFF products are legally defined under the Health Functional Food Act. HFF products are manufactured and processed with ingredients and components beneficial to the human body, and distributed in forms such as a capsule, a pill and liquid among others. Unlike general food products, HFF products are subject to MFDS' approval² for ingredients to be able to claim their health-oriented function in product labeling. For the last decade, the focus of ROK's HFF industry has shifted to disease prevention and health management from basic nutrition supplement. In particular, the pandemic has heightened public awareness of overall healthcare and products in the category of immune system care have gained popularity. Nowadays, more diverse functional categories such as products for gut health, skin health, beauty-related care, and customized health care are available in the sector and appeal to consumers.

In 2024, the market size of the sector reached 5.07 trillion Korean won (3.7 billion dollars).³ It is down 1.7 percent from the prior year but grew by 1.8 times compared to 10 years ago (2.9 trillion Korean won

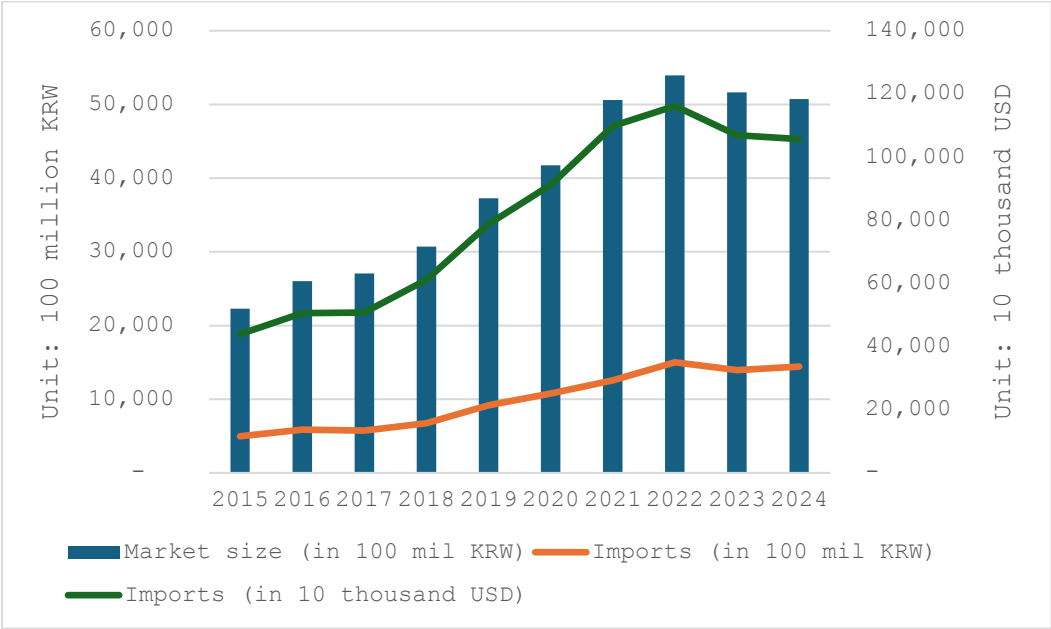
¹ 1,364 KRW/USD in 2024

² Further information is available in the Section 3. Products by Approval Category.

³ Source: 'Food Production Performance in 2024' by the Ministry of Food and Drug Safety (MFDS).

in 2015). It appears that the market grew explosively during the pandemic with high interest in products for immune system care, and then has reached a mature stage, gradually stabilizing. Chart 1 shows the market size and import trend over the last ten years.

Chart 1. Market Size and Import Trends (2015–2024)



Source: ‘Food Production Performance in 2024’ by the Ministry of Food and Drug Safety (MFDS).

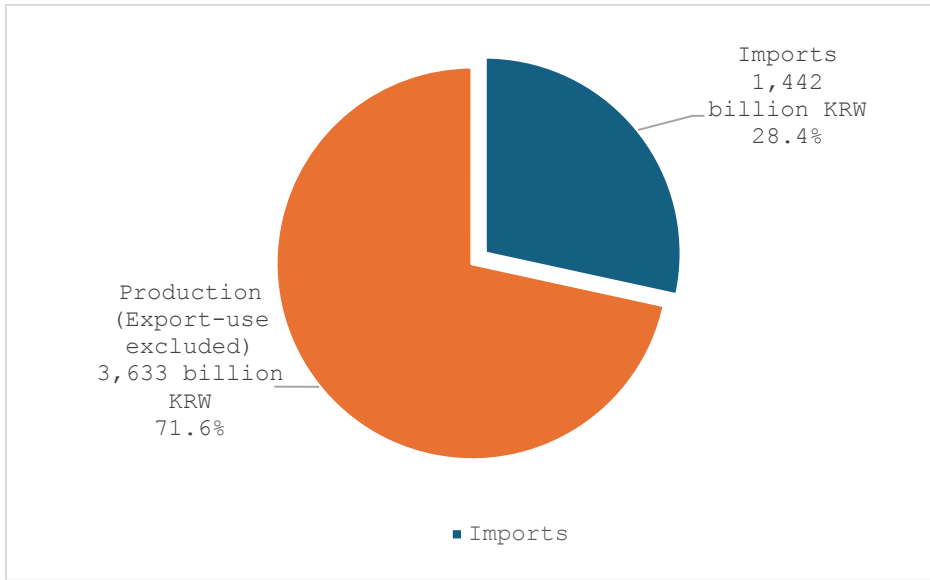
In 2024, imported products made up 28.4 percent (1.4 trillion KRW⁵, 1.57 billion USD⁶) of the market. The top five supplying countries accounted for nearly 80 percent of the imports in which the United States was the largest player (43.4 percent of market share) and recognized by consumers for high quality products and safety. Further details on the sector composition and import trend are depicted in Charts 2 and 3.

⁴ Figures for the market size vary by institutions as their methods of collecting data are different from one another. According to the survey conducted by the Korean Health Functional Food Association (KHFF), the 2024 market size is 6.44 trillion KRW. However, this report primarily uses data from MFDS, which is 5.07 trillion KRW.

⁵ A decrease of 1.1 percent from 2023 on the USD basis, and an increase of 3.4 percent on the KRW basis.

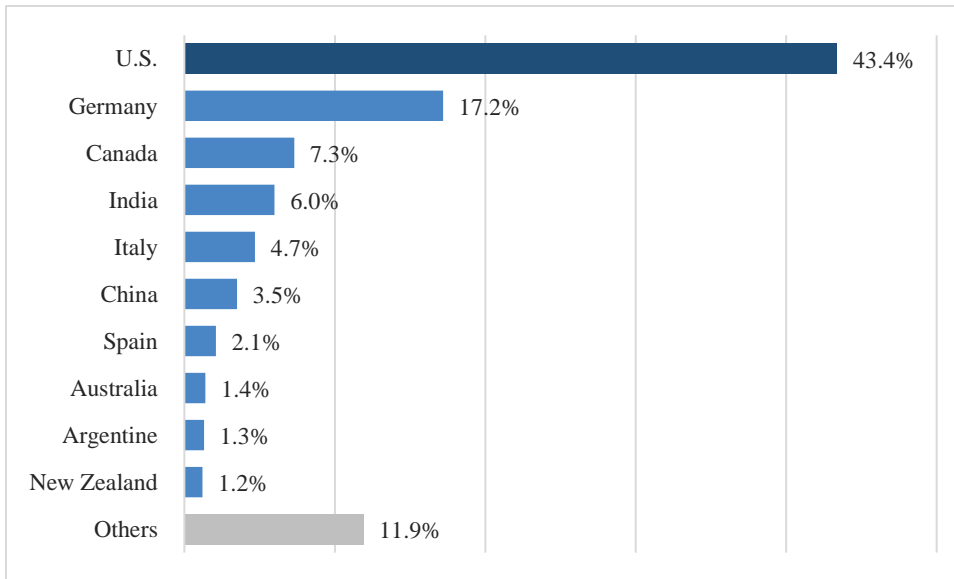
⁶ 1,364KRW/USD in 2024

Chart 2. 2024 HFF Market Composition: Imports vs Domestic Production



Source: 'Food Production Performance in 2024' by the Ministry of Food and Drug Safety (MFDS).

Chart 3. Import Share by Country (2024)



Source: 'Food Production Performance in 2024' by the Ministry of Food and Drug Safety (MFDS).

Section III. Products by Approval Category

In ROK, HFF products are divided into two categories depending on how the functional ingredients are approved by the Ministry of Food and Drug Safety (MFDS): 1) notified products and 2) individually approved products.

Notified products use functional ingredients that have already been approved and announced by the government. Common examples include red ginseng, vitamins and probiotics.

Individually approved products are made with ingredients of which approval was initiated by individual companies who prepare and submit clinical evidence to receive approval for specific ingredients. Examples include milk thistle, lutein, and theanine.

In 2024, notified products accounted for 85 percent of the market and individually approved products took 15 percent. As demand for premium HFF products continues to grow, the share of individually approved products is expected to expand further.

Section IV. Consumption and Product Trend

According to a 2024 HFF consumer survey by the Korean Health Functional Food Association (KHFF), eight out of ten households purchased HFF products at least once in 2024.

The primary consumer group was traditionally those in their 50s or older. However, it has expanded to adults in their 20s and 40s and children as well. This reflects a consumption trend that is evolving from basic nutrition supplementation for seniors to a healthcare lifestyle that covers a wide age group.

Demand for product categories focusing on skin and beauty related care, sleep quality improvement, stress relief, concentration improvement is growing fast. Collagen, glutathione, and hyaluronic acid supplements in the beauty category are especially popular for female consumers while steady selling products include red ginseng, probiotics, multi-vitamin supplements among others.

The most common forms of supplements are capsules, pills (tablet), and powders, though consumers are gradually becoming more familiar with gummy and liquid forms.

According to KHFF's 2024 consumer survey, consumers tend to purchase HFF products online (69.8 percent). Among online channels, open market and social commerce platform were most popular (32.3 percent). This indicates that online and contactless purchase have become common since the pandemic.

The following tables illustrate the product composition of the ROK's HFF market by category. Table 1 shows the overall domestic market, where Red Ginseng, Vitamin & Minerals, Individually Approved Products, and Probiotics account for 72 percent of the total market based on sales in 2024. Table 2 provides more details of Individually Approved Products, where the top three products cover over one third of the category. Table 3 focuses specifically on imported HFF products.

Table 1. Top selling HFF products within the market (based on sales in 2024)

| | Items | Share (%) |
|----|--------------------------------|------------------|
| 1 | Red ginseng | 21.5 |
| 2 | Vitamin & Minerals | 17.4 |
| 3 | Individually approved products | 17.2 |
| 4 | Probiotics | 15.9 |
| 5 | EPA & DHA containing oil | 6.0 |
| 6 | Milk thistle extract | 3.2 |
| 7 | Fructooligosaccharides (FOS) | 2.0 |
| 8 | Garcinia cambogia extract | 1.3 |
| 9 | Phosphatidylserine | 1.2 |
| 10 | MSM | 1.1 |
| 11 | Others | 13.1 |
| | Total | 100 |

Source: 'Food Production Performance in 2024' by the Ministry of Food and Drug Safety (MFDS).

Table 2. Top selling HFF Individually Approved Products (based on sales in 2024)

| | Items | Share (%) |
|----|---|------------------|
| 1 | Lutein Zeaxanthin complex extract | 12.6 |
| 2 | Complex extract including HemoHim, Angelica Gias etc. | 12.4 |
| 3 | Xylooligosaccharide powder | 10.7 |
| 4 | Complex including Astragalus extract (HT042) | 5.0 |
| 5 | Seaweed complex extract (Xanthigen) | 3.0 |
| 6 | Low molecular collagen peptide | 2.9 |
| 7 | Hovenia dulcis fruit extract powder | 2.2 |
| 8 | Green apple extract applephenon | 2.1 |
| 9 | Green lipped mussel oil complex | 1.7 |
| 10 | Respecta probiotics | 1.7 |
| 11 | Others | 45.6 |
| | Total | 100 |

Source: 'Food Production Performance in 2024' by the Ministry of Food and Drug Safety (MFDS).

Table 3. Top selling imported HFF products (based on import value in 2024)

| | Items | Share (%) |
|----|--|------------------|
| 1 | Complex nutrient products | 35.4 |
| 2 | Complex products including nutrient and functional Ingredients | 22.1 |
| 3 | Probiotics | 13 |
| 4 | EPA & DHA containing oil | 10.6 |
| 5 | Lactobacillus gasseri BNR17 | 4.2 |
| 6 | Protein | 4.2 |
| 7 | Vitamin C | 2.8 |
| 8 | Phosphatidylserine | 2.5 |
| 9 | Milk thistle extract | 1.9 |
| 10 | Chondroitin sulfate | 1.7 |
| 11 | Others | 1.6 |
| | Total | 100 |

Source: ‘Food Production Performance in 2024’ by the Ministry of Food and Drug Safety (MFDS).

Korean consumers place high value on product functionality, safety, and brand credibility. Given the increasing purchasing power of Korean consumers, demand for high quality healthcare products is expected to grow steadily. This makes the ROK market more attractive for U.S. exporters as U.S. products are well recognized by Korean consumers for their premium image, credibility and high quality.

Section V: Key Contacts and Further Information

U.S. suppliers seeking entry into the ROK need to check if their products meet Korean food regulations and standards. For assistance in identifying or resolving regulatory issues, please refer to [the Office of Agricultural Affairs \(OAA\) Seoul](#). The U.S. Department of Commerce’s [Country Commercial Guide](#) and [Market Intelligence on Health Functional Food](#) also contains useful information. Additionally, the socio-economic data can be found in the [CIA Factbook](#).

Host Country Government

[Ministry of Agriculture, Food and Rural Affairs \(MAFRA\)](#)

[Ministry of Food and Drug Safety \(MFDS\)](#)

USDA Office in Seoul

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|--|---|
| Agricultural Trade Office (ATO) Address: Room 303, Leema Building, 42 Jongro 1-gil, Jongro-gu, Seoul, Korea | Phone: +82-2 6951-6848 Email: atoseoul@usda.gov |
| Agricultural Affairs Office (AAO) Address: U.S. Embassy, 188 Sejong-daero Jongro-gu, Seoul, Korea | Phone: +82-2 397-4297 Email: agseoul@usda.gov |

<https://kr.usembassy.gov/agricultural-affairs/>

Animal Plant and Health Inspection Service (APHIS)

Address: Room 303, Leema Building, 42 Jongro
1-gil, Jongro-gu, Seoul, Korea

<http://www.aphis.usda.gov/>

Phone: +82-2 725-5495

Email: yunhee.kim@usda.gov

Attachments:

No Attachments.