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Report Highlights:

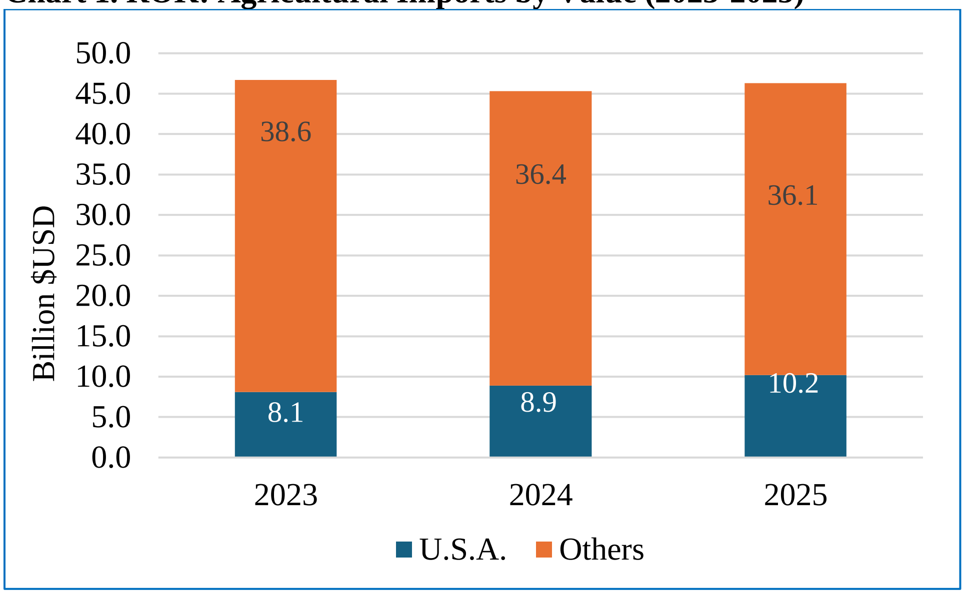
In 2025, U.S. agricultural and related products exported to the Republic of Korea (ROK), the fifth-largest overseas market for U.S. agricultural products, reached $10.2 billion, an increase of 14 percent from the previous year. The growth significantly outpaced the overall increase in Korea's agricultural and related products imports, which rose only 2.2 percent to $46.3 billion. As a result, the U.S. share of Korea's agricultural import market expanded from 19.6 percent in 2024 to 22 percent in 2025. This report highlights 2025 export performance of the U.S. agricultural products and underlying factors driving market changes.

I. Market Overview & U.S. Export Performance

Korea's agricultural import market remained relatively flat in 2025, expanding only 2.2 percent year-over-year to $46.3 billion. Despite the limited growth in overall import demand, U.S. agricultural exports increased by 14 percent, reaching $10.2 billion and substantially outperforming competing suppliers. The increase was driven primarily by strong gains in bulk commodities, particularly corn and wheat, which benefited from favorable pricing and supply conditions. Intermediate products delivered mixed results, while consumer-oriented products experienced a modest decline as weaker meat imports offset gains in dairy products and tree nuts. The trade data analysis demonstrates the continued competitiveness of U.S. agricultural products across multiple sectors and the ability of U.S. suppliers to respond to changing market conditions in Korea.

The following chart shows the trends in export performance of the United States versus other suppliers for the past three years.

Chart 1. ROK: Agricultural Imports by Value (2023-2025)



Source: www.fas.usda.gov/GATS, Trade Data Monitor (TDM)

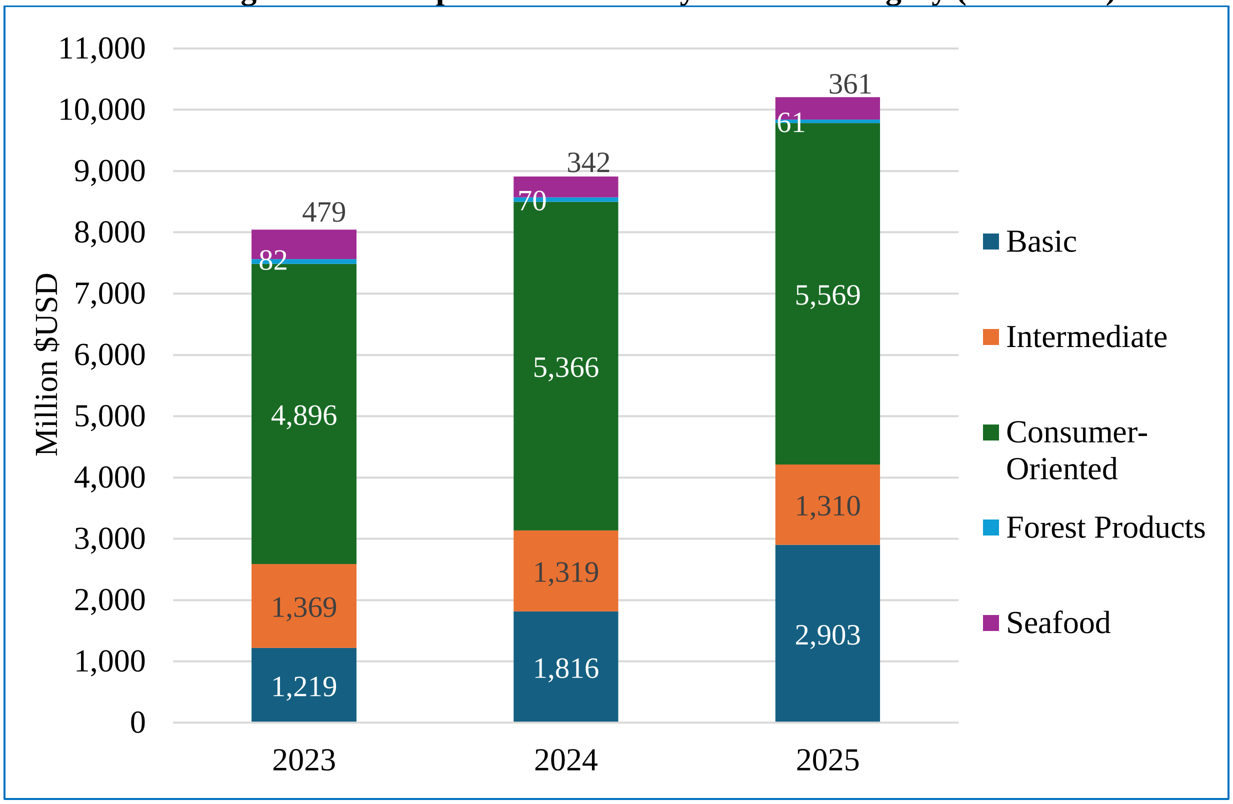
The U.S. market share increased from 19.6 percent in 2024 to 22 percent in 2025, indicating a significant gain in competitiveness. The expansion was driven largely by increased shipments of bulk commodities, particularly feed grains and wheat, as Korean importers responded to favorable U.S. pricing, reliable logistics, and diversified sourcing needs.

Although global commodity markets continued to experience volatility in 2025, including fluctuations in grain, oilseed, and food ingredient prices, Korean importers increasingly favored suppliers capable of providing stable supply and competitive pricing. The U.S. industry was well positioned to capitalize on these market conditions.

II. Sector Analysis and "Star" Products

In 2025, major U.S. trade wins were made by bulk commodities under basic category (see **Chart 2**). Follows below a brief analysis on the performances by 3 major agriculture and food product categories featuring "star" products.

Chart 2. ROK: Agricultural Imports from USA by Product Category (2023-2025)



Source: www.fas.usda.gov/GATS

1. Basic Products (Bulk Commodities): Corn and Wheat

Bulk commodity exports represented the strongest-performing category in 2025, increasing 60 percent year-over-year. Corn and wheat accounted for the majority of this growth. U.S. corn exports to Korea increased approximately 170 percent compared to 2024 despite a slight decline in Korea's total corn imports. The increase was driven by improved U.S. price competitiveness, favorable crop availability, and reduced export supplies from competing origins. Korean feed manufacturers and grain importers actively shifted purchases toward U.S. corn as part of cost-management strategies.

Similarly, U.S. wheat exports benefited from favorable market conditions and increased demand from Korea's milling industry and feed industry. These gains more than offset declines in several other bulk commodity categories. For more details, please refer to the FAS Seoul's Grain & Feed Annual.

2. Intermediate Products: Other Feeds and Soybean Oil

Intermediate product exports declined slightly overall, but several products recorded notable gains.

Although Korea's imports of traditional U.S. bulk feed ingredients such as hay and distiller's grains declined significantly in 2025, demand for diversified feed materials remained stable, allowing U.S. exports of other feeds, meals, and fodders to post 2 percent growth. While the ROK's cattle inventories declined, poultry and swine sectors maintained relatively stable production levels, supporting demand for specialized feed ingredients used in compound feed manufacturing. This shift helped sustain imports in the "other feeds, meals, and fodders" category despite overall weakness in several major feed ingredient segments.

Imports of U.S. soybean oil increased sharply from a relatively low base in 2024. While import volumes remained below the levels observed during 2019–2021, the increase appears to have been driven primarily by temporary inventory replenishment and short-term procurement opportunities, rather than any structural shift in Korea's edible oil market. South American suppliers and multinational agribusiness firms continue to dominate Korea's long-term soybean oil supply channels.

For more detailed information on oilseed products, please refer to the FAS Seoul's Oilseed Annual.

3. Consumer-Oriented Products: Mixed Performance but Still Strong Growth Leader

Imports of U.S. consumer-oriented products declined modestly by 1.6 percent in 2025. Lower imports of beef and pork reflected weaker consumer spending and increased competition within the protein sector. Nevertheless, gains in dairy products and tree nuts helped partially offset these declines.

3-1. Meat and Meat Products: Category Leader but Selective Gains

U.S. beef maintained a strong position in Korea's imported beef market due to consumer confidence in product quality and well-established distribution channels. While overall growth was limited, demand remained stable, particularly for frozen beef products.

U.S. pork exports declined by nearly 10 percent as stable domestic pork production reduced import demand. Despite the decline, the United States remained Korea's largest pork supplier with a market share exceeding 30 percent.

3-2. Dairy Products: Rising Demand for Ingredients

Dairy products were among the strongest-performing consumer-oriented categories in 2025. Rising consumption of Western-style foods, expansion of bakery and café chains, and increased demand from quick-service restaurants supported higher imports of cheese, butter, and dairy ingredients. Korean food manufacturers continue to rely on imported dairy products due to limited domestic supply and competitive pricing.

3-3. Tree Nuts: Exceptional Performance

Tree nuts delivered one of the strongest growth performances among consumer-oriented products, with U.S. exports increasing 25 percent year-over-year. Growth was supported by expanding demand for premium snacks, bakery products, confectionery applications, and innovative food products.

Pistachios emerged as a particularly strong performer due to the popularity of premium dessert concepts featuring pistachio-based ingredients. Continued consumer interest in healthy snacking also supported steady demand for almonds and walnuts.

III. Market Outlook & Conclusion

The 2025 trade results demonstrate the continued strength and adaptability of U.S. agricultural exports in Korea. While consumer-oriented products remain an important driver of long-term growth, the strongest gains in 2025 were generated by bulk commodities, highlighting the importance of maintaining competitiveness across all product categories.

Looking ahead, opportunities are expected to remain favorable in both ingredient-oriented and consumer-oriented sectors, particularly dairy products, tree nuts, food ingredients, and selected feed inputs. At the same time, Korean buyers are expected to remain highly price-sensitive, requiring U.S. suppliers to maintain competitive pricing and supply reliability.

Continued success in Korea will depend on the ability of U.S. exporters to respond quickly to fast-changing consumer preferences, evolving industry demand, and competitive pressures from both established and emerging suppliers.

IV. Post Contacts & Further Information

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Attachments:

No Attachments.