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Report Highlights:

In 2024, Taiwan's Hotel, Restaurant, and Institutional (HRI) industry reached a record sales value of NT\$1.3 trillion Taiwanese dollars, approximately US\$33 billion. Although sales continued to rise, the number of businesses in this sector increased only slightly, reflecting the fierce competition in the industry. Taiwan's market reflects a strong and growing western palate, supported by a high per capita GDP and consumers' willingness to spend on food experiences. The United States continues to be the leading supplier of various food ingredients for the market, such as beef, poultry, fresh fruits, and vegetables.

Executive Summary

Taiwan has an upper-income economy with a GDP of US\$804 billion. Due to the limited arable and small agriculture sector, it relies heavily on imports of food and agricultural products and is a major importer in the global agricultural marketplace. Ranking as the eighth-largest market for U.S. agricultural exports, Taiwan imported US\$3.8 billion in agricultural and related products from the U.S. in 2024, representing 20.94 percent of the island's total imports.

Consumer-Oriented Agricultural Imports

In 2024, Taiwan imported US\$2.1 billion consumer-oriented agricultural products from the U.S., representing 22.72 percent of Taiwan's the total consumer-oriented import value. The top categories included beef, fruit, poultry, dairy and tree nuts.

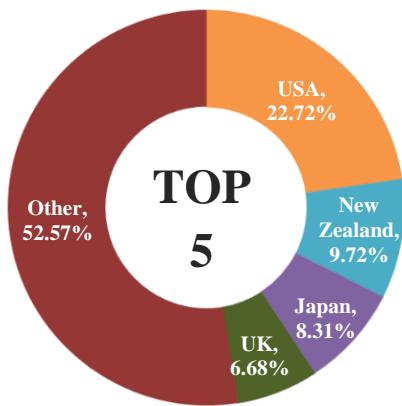


Chart 1: Top Exporting Countries to Taiwan

Food Retail Industry

Taiwan's food and beverage retail sales reached US\$8.9 billion in 2024. This strong performance reflects the island's exceptionally high density of convenience stores - over 10,000 stores island-wide - among the highest in the world. E-commerce is also booming, with supermarkets increasingly partnering with food delivery services, such as Uber Eats, to expand access to groceries.

Food Processing Industry

In 2024, Taiwan's food processing industry produced US\$30.5 billion in processed food and beverages, which accounted for 4.9 percent of the island's total manufacturing value. Consumer preferences for convenience and growing interest in food health and safety are driving innovation, particularly in easy-to-prepare meals, healthier options, and clean-label products.

Food Service Industry

In 2024, Taiwan's foodservice revenue reached US\$33 billion. The industry is seeing more growth in grab-and-go establishments than full-service restaurants.

Quick Facts CY2024

Imports of Consumer-Oriented Products

US\$2.1 billion

Top 10 Growth Products in Host Country

Beef	Poultry
Dairy products	Fresh Fruit
Tree Nuts	Fresh Vegetables
Seafood	Pet Food
Plant Protein	Coffee, Roasted

2024 Food Industry by Channel (US\$ billions)

Retail Food Industry	US\$8.9
Food Service-HRI	US\$33.0
Food Processing	US\$30.5
Food and Agriculture Exports	US\$5.8

Top 10 Taiwan Retailers

7-Eleven	Family Mart
PX Mart	Shin Kong Mitsukoshi
Costco	Far Eastern
Momo	Sogo
Carrefour	PChome

GDP/Population

Population (millions): 23.4

GDP (billions): US\$804.89

GDP Per Capita: US\$34,430

Source: Department of Statistics, Taiwan Ministry of Economic Affairs; Ministry of Agriculture; International Monetary Fund

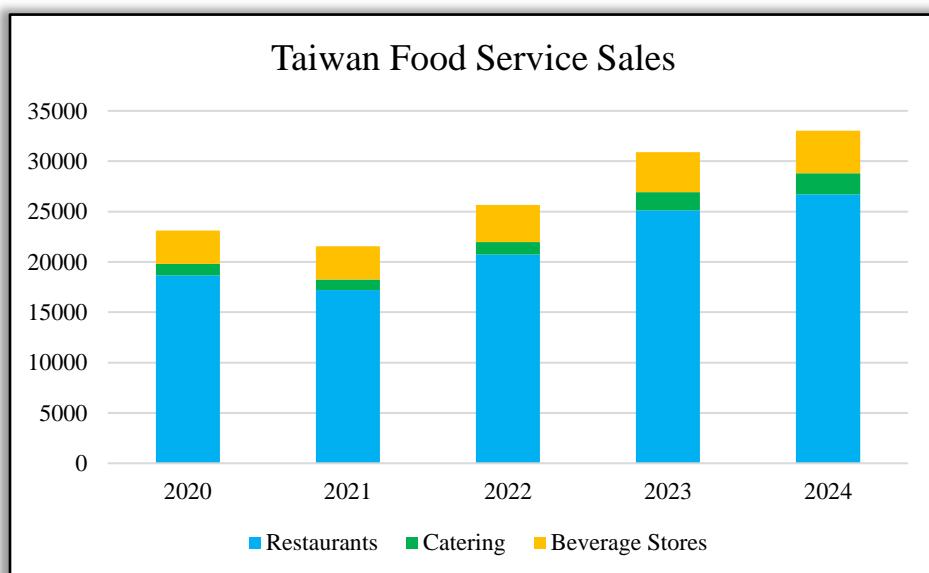
SWOT

Strength	Weakness
The U.S. remains the leading supplier of consumer-oriented products, which continue to demonstrate robust growth potential.	Many U.S. companies are reluctant to offer low-volume or consolidated shipments of high-value products, limiting market access for small importers.
Opportunity	Threat
There is increasing growth of fast-food chains and casual dining restaurants, boosting consumption of food ingredients.	Taiwan's FTA partners offer products at a lower cost, which dampens importers' interest in purchasing U.S. products.

Section 1: Market Summary

According to the Taiwan Ministry of Economic Affairs, the estimated economic output of Taiwan's food service sector in 2024 was US\$33 billion, which increased almost seven percent from the previous year.

The restaurant industry – comprising 62 percent full-service restaurants and 38 percent quick-service restaurants - grew six percent from last year to reach US\$26.7 billion. The beverage industry grew seven percent to reach US\$4.2 billion, driven by strong performance in boba shops, coffee shops, and ice-dessert shops. Bars experienced stagnant growth, while tea shops saw declines. The catering industry grew 17 percent to reach US\$2.1 billion, partially supported by increased demand from Taiwan's growing technology hubs.



Source: Ministry of Economic Affairs; Unit: US\$ million



Taiwan is a popular tourist destination for its food culture. Visitors can explore the bustling night markets across the island, where a wide array of sweet and savory street snacks beckon food lovers. For a more refined dining experience, travelers can consult the latest Michelin Guide to choose a fine-dining establishment in major cities such as Taipei, New Taipei, Hsinchu, Taichung, Tainan, or Kaohsiung.

The Michelin Guide debuted in Taiwan in March 2018, handing out stars to mid- to high-end restaurants in Taipei. The publication not only triggered fierce competition among fine-dining establishments but also encouraged Michelin-starred chefs from other markets to open their branches in Taiwan.

The 2025 edition of the Michelin Guide recommends 419 restaurants in Taiwan. The full list can be found [here](#).

Advantages and Challenges for US Exporters

Advantages	Challenges
U.S. food products have an excellent reputation among consumers.	Numerous food regulations and standards are not in line with U.S. or international standards.
Around 20 active USDA cooperators organize promotional programs in restaurants and hotels regularly to increase consumer awareness.	U.S. exporters are sometimes reluctant to change product specifications to comply with Taiwan's regulatory requirements or consumer preferences.
American holidays, culture, and lifestyle lead to promotional events hosted by restaurants and hotels throughout the year.	While Taiwan is one of the largest markets for U.S. agricultural exports, it is often overlooked by U.S. suppliers in favor of export directly to China.
The U.S. is a leader of trendsetting food brands and innovation that appeals to Taiwan's brand-conscious consumers.	Competitors have free trade agreements with Taiwan that drastically cut tariffs for their products.
Increasing growth of fast-food chains and casual dining restaurants provide more opportunities for western-style food.	A low birth rate and a rapidly aging population pose potential long-term challenges for Taiwan.

Section 2: Road Map for Market Entry

Entry Strategy

Food and beverage (F&B) managers and executive chefs working in major international hotels are the key decision-makers for procurement. Hotels employing foreign chefs or offering authentic international cuisines typically tend to use more items from importers than wholesalers or distributors.

Western and local fast-food chains usually either have their own distribution channels or contract an independent distribution center to purchase, process, and deliver food ingredients. These fast-food chains also maintain their own research and development teams or work in close collaboration with one or more contracted catering services to develop and refresh menus to meet consumer demand.

Mid-level, family-style chain restaurants often rely on a centralized purchasing department and centralized kitchens. The centralized kitchens prepare and deliver food items across all locations within the chain, ensuring consistency and efficiency.

HRI Distribution Channel Flow Diagram



Market Structure

Most HRI companies purchase most of their food products from importers, distributors, wholesalers, regional wholesale markets, wet markets, and hypermarkets. Imported items such as fresh produce, seafood, and beef are usually purchased and delivered directly from importers or through distributors or wholesalers. Consequently, U.S. companies should concentrate their efforts on establishing business relationships with reliable and efficient importers and distributors who supply directly to HRI end users.

A recent trend is the increasing use of retail outlets such as Costco by many small food services and HRI operators. These businesses often buy items in bulk at the lowest possible cost, reducing reliance on multiple importers. Costco's Taiwan operations continue to be some of the corporation's most profitable branches globally.

Sub-Sector Profiles

Hotels

Hotel restaurants and buffets are popular dining choices for Taiwanese consumers, making food service a significant source of revenue for hotels. Peak business periods include major local and western holidays, such as Lunar New Year, Valentine's Day, and Christmas. Promotions that correspond with international holidays, such as discounts on American cocktails during Independence Day and buy-one-get-one-free beer during Oktoberfest, are also widely observed in the market. In addition, hotels regularly develop gift boxes for gift-giving seasons, such as moon cakes for Mid-Autumn Festival and rice dumplings for Dragon Boat Festivals. These products heavily feature high-end ingredients and present great business opportunities for U.S. exporters to align their strategies with the local calendar.

Top 5-star Hotels by Food Service Sales		
Hotel	Location	2024 Sales (US\$ millions)
The Regent Taipei	Taipei	68.0
Sheraton Grand Taipei	Taipei	49.0
Grand Hyatt	Taipei	41.4
Marriott	Taipei	31.2
Marriott	Kaohsiung	30.9

Source: [Ministry of Transportation and Communications](#)

Restaurants

Most restaurants in Taiwan are casual dining. Most of the restaurants in this category are small businesses, and they purchase materials mainly from wholesalers and wet markets. Only larger chains and franchises tend to buy products from importers or import directly.

Company Name	Overview	Location
WowPrime Corp.	A local food service company operates 358 family-style restaurants in Taiwan and 92 restaurants in China under 29 brands.	Taiwan, China
TTFB Company Limited	A local restaurant chain that operates family-style Thai and Chinese food restaurants under nine brands with 151 locations.	Island wide
McDonald's	The largest western fast-food chain with 417 stores.	Worldwide
Gourmet Master Co., Ltd.	A local food service engaged in the operation of coffee and bakery chain stores under the brand 85 degrees C with more than one thousand stores worldwide, including in the US and Australia.	Worldwide
Starbucks Coffee	Operated by Uni President, there are 550 regular Starbucks stores and 25 Reserve stores in the market.	Worldwide
Louisa Coffee	A local cafe chain with 550 stores in Taiwan and plans to open stores in India, Malaysia, Japan and the US. The brand is also branching out from coffee and opening bakeries and restaurants.	Taiwan, Thailand

Section 3: Competition

The United States is a leading supplier of agricultural products and exports many high-valued consumer-oriented products, including beef, poultry, fresh fruit and vegetables, dairy, tree nuts, processed foods, and beverages used by food service operations. Other major competitors in the market include New Zealand, Australia, Thailand, Japan, Canada, and EU countries.

Product Category	2024 Gross Imports (US\$ millions)	1st Supplier	2nd Supplier	USA
Beef	1,343	USA 695 (52%)	Australia 259 (19%)	695 (52%)
Dairy	1,069	New Zealand 430 (40%)	USA 110 (10%)	110 (10%)
Fresh fruit	804	USA 255 (32%)	New Zealand 222 (28%)	255 (32%)
Wine	261	France 141 (54%)	USA 22 (8%)	22 (8%)

Section 4: Best Product Prospects

Top Consumer-Oriented Products Imported from the World

Product Category	2024 Imports from the World (US\$ millions)
Beef	1,343
Dairy	1,069
Distilled spirits	759
Soup and food prep	809
Fresh fruit	804

Top Consumer-Oriented Products Imported from the United States

Product Category	2024 Imports from the US (US\$ millions)
Beef	695
Poultry	268
Soup and food prep	282
Fresh fruit	255
Dairy	110

Products Present in the Market with Good Sales Potential (Unit: US\$ millions)

Product Category (HS Code)	2024 Imports from the US	2024 Total Imports	Key Constraints for Market Development	Market Attractiveness for US Exporters
Cheese (0406): cheddar, mozzarella, cream cheese, string cheese	US\$35	US\$180	Compliance with allowable levels of preservatives in processed cheese	Young market for dairy consumption with room to grow. Expanding consumption driven by ready-to-eat sector of convenience store chains
Tree Nuts (0802/080132): walnut, almond, pecan, pine, pistachio, macadamia, cashew	US\$77	US\$143	Price competition from Australia and Iran	Health-conscious market with versatile applications in snacks, beverages, and baked goods
Pork (0203)	US\$12	US\$288	Local and political perception that U.S. pork contains ractopamine	Strong market demand for intestines and other edible parts
Seafood (03)	US\$20	US\$1,453	Price competition from neighboring Asian countries	Local perception that U.S. seafood is high-quality and sustainable

Products Not Present in Significant Quantities with Good Sales Potential (Unit: US\$ millions)

Product Category (HS Code)	2024 Imports from the US	2024 Total Imports	Key Constraints for Market Development	Market Attractiveness for US Exporters
Frozen Fruit (081190): berries	US\$1.0	US\$15	Lack of awareness of U.S. suppliers	Growing demand from consumers
Whey Protein Concentrate (350290)	US\$3.7	US\$5.2	Lack of awareness about product specs and applications	Aging population demands added nutritional value
Concentrated Fruit Juice (2106907000)	US\$0.05	US\$2.6	Compliance with Taiwan's Chinese National Standards (CNS)'s classification of base fruits for concentrate juice uses	Expanding applications for beverage manufacturers in making not just fruit juices, but also flavored sparkling water

Product Not Present Due to Significant Barriers (Unit: US\$ millions)

Product Category (HS Code)	2024 Total Imports	Current Exporters	Key Constraints for Market Access	Market Attractiveness for US Exporters
Fresh Ginseng (12112040)	US\$5.0	Canada China	Certain MRLs have not been registered	Aging population is attracted to traditional medicine

Section 5: Key Contacts and Further Information

Name	Official Website
Taiwan Ministry of Agriculture	https://eng.moa.gov.tw/
Taiwan Food and Drug Administration	https://www.fda.gov.tw/ENG/index.aspx
Taiwan Food Industry Development Association	http://www.tfida.org.tw/
Food Association of Taiwan	http://www.foodtw.org.tw/
Taiwan Quality Food Association	https://www.tqf.org.tw/en
Taiwan Beverages Industry Association	http://www.bia.org.tw/zh-tw/a1-10647/English.html
Food Industry Research and Development	https://www.firdi.org.tw/En_Firdi_Index.ASPX

Please contact FAS offices for questions and assistance.

For Trade Policy/Market Access and General Agricultural Issues contact Agricultural Affairs Office at:

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Attachments:

No Attachments