

SOUTH KOREA

SAMPLE REPORT PRELIMINARY DATA

TOP THOUGHTS

- Much of the South Korean biotics supplement market, from innovation to production and marketing, happens inside the country
- Obtaining claims is complicated and requires an in-country partner
- The combination of a heavy reliance on e-commerce and influencers as primary trend drivers should be considered by any brand attempting to gain traction

A country that is deeply familiar with fermented food, consistently keen on the next nutrition trend, and served by a robust e-commerce market closely connected to legions of wildly popular influencers would appear to be a prime market for biotics. South Korea is that prime market.

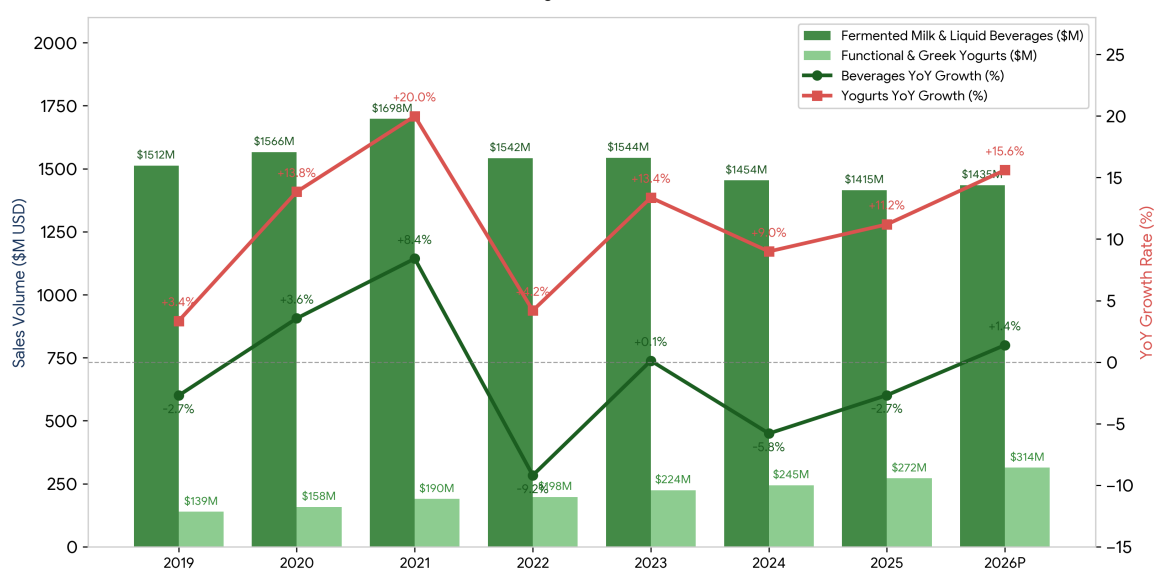
To a point.

Calling a market “prime” is different from calling it simple, and even farther from calling it easy. South Korea is a case in point. With functional food and beverage depending on the protein-driven strength of functional and Greek yogurts for growth while the biotic supplements market is buffeted by pre- and probiotics recovering slightly to balance on a tipping point between maturity and decline, the right bets on the right categories will be crucial for turning that prime promise into profits.

The bright spot in the South Korean biotics market overall is food and beverage, growing by a projected 3.68% in 2026 to hit \$1.75 billion at year's end. Within that market, functional and Greek yogurts are the even brighter spot, on their way to a projected 15.6% growth curve.

Meanwhile, postbiotics and synbiotics are doing the heavy lifting to nudge the biotics supplement market back to positive growth, though barely. Biotics supplements are projected to grow 0.88% in 2026, buoyed by postbiotics gaining 14.7% and synbiotics pulling ahead by 3.9%.

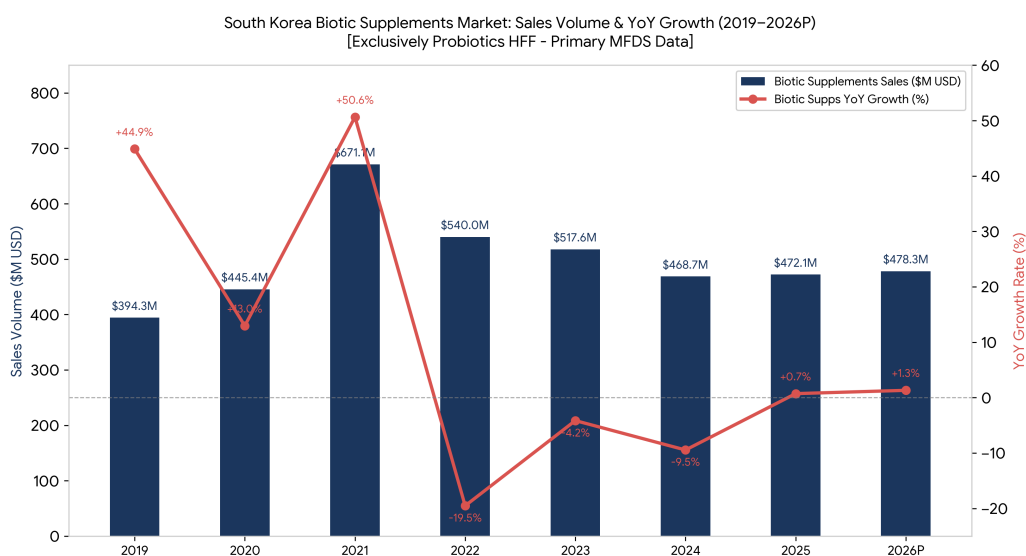
South Korea Functional F&B Biotics: Sales Volume & YoY Growth (2019–2026P)
[YoY Growth Lines Starting in 2019 Calculated vs. 2018 Baseline]



The move from supplements to food and beverages was not uncommon in other markets in the late 20teens, but the South Korean market got a boost from the adoption of the stick pack format, which pushed sales higher in 2019, driven by Chong Kun Dang Health's Lacto-Fit powder sticks, for which sales roughly doubled. The "COVID boom" that swept across the global supplement markets, arrived later for South Korea, with growth peaking in 2021 when the DELTA variant forced authorities to tighten restrictions. Biotic supplements shot up by 51% in USD.

That boom was short-lived for biotic supplements in South Korea, however. According to GNIJ estimates, total biotic supplements dropped by 23% between 2021 and 2025, a decline deepened in respect to USD by weakness in the Korean Won currency exchange. A rebound of sorts is in the works for 2026, with projections calling for a \$4.5 million gain.

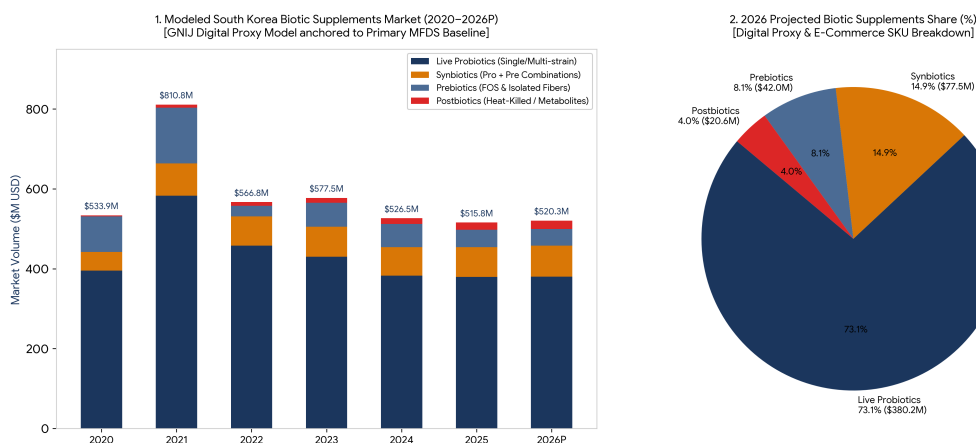
Without postbiotics and synbiotics, the early post-pandemic picture would have been even worse. The two subcategories gained \$4.6 million between 2021 and 2025, even as live probiotics and standalone prebiotics suffered heavy losses.



The difference between the biotics food and beverage market and the biotics supplement market is not entirely surprising, but there are trends worth noting here. Protein is on a trajectory that was hard to imagine in South Korea, and the acceleration in protein sales is well behind the protein boom that happened in the US when tubs of protein moved from the weight room into the grocery basket.

Protein is not, of course, something that really fits in a pill, a gummy or even a stick pack, and in beverages and yogurts it's an ideal platform for biotics to perform as the differentiator.

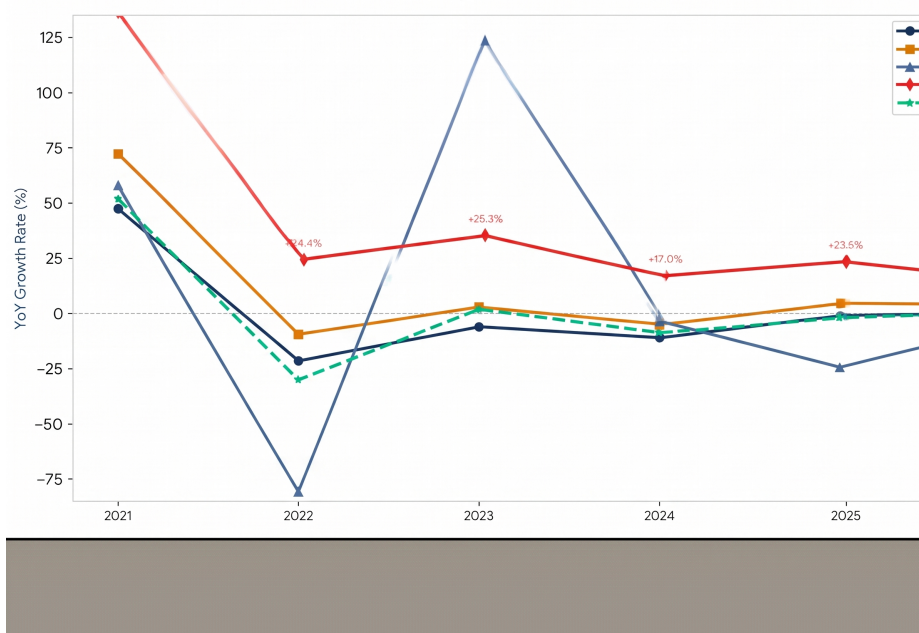
Supplements lack that pairing potential. It's easy to see famously busy South Korean office workers grabbing a functional protein drink rather than the stick packs that dominate the format range for biotics supplements, something unique to the South Korean market.



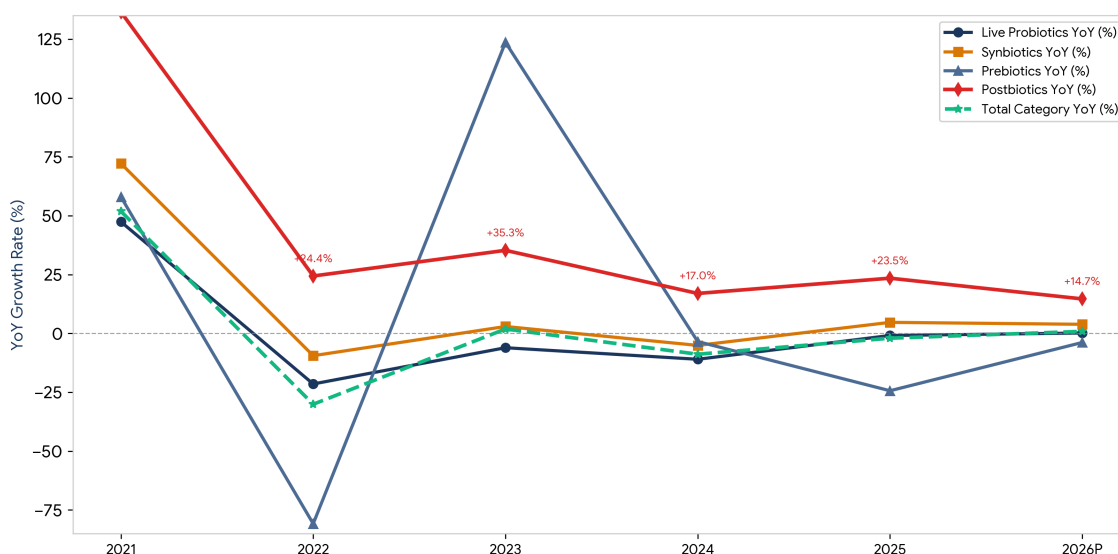
Against that growing challenge, the task of building supplement growth appears formidable. Except for a post-lockdown blip in 2022, functional food and beverage has shown steady growth, even as the biotics supplement market suffered.

It's not clear that innovation in supplements is a factor hindering growth here, but it bears discussing in a market that stands out in the global biotics market in a way that would seem unlikely anywhere else. An innovation pipeline rooted in a constellation of research universities feeds a domestic production infrastructure that in turn supplies products to a domestic market. South Korea-based companies like ILDONG Bioscience make the most of that sequence, producing raw material probiotics and also selling finished products, Bifido Co. standing out for its record of capitalizing on research and patents.

South Korea Biotic Supplements YoY Growth Rates by Subcategory (2021–2026P)
[Modeled Subcategories Anchored to Primary MFDS Total Baseline]



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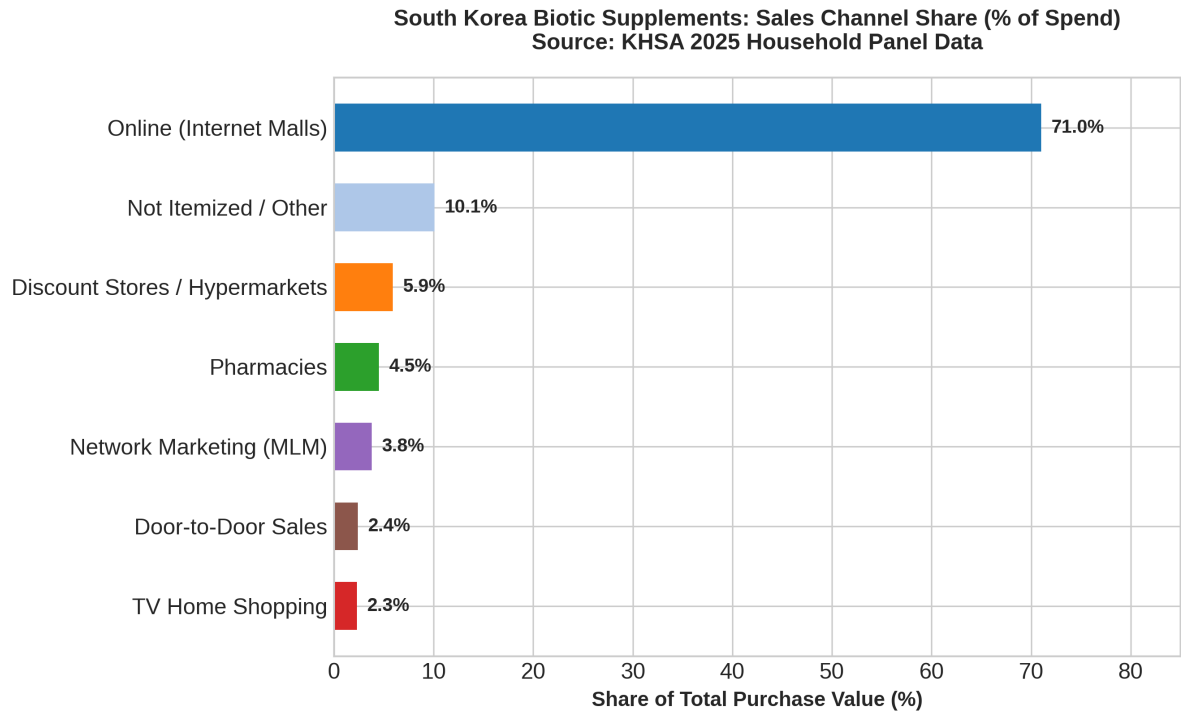


All of this happens largely within South Korea’s borders, however, with exports seemingly operating short of potential, and imports facing strict limits on claims that make market entry impossible without a South Korean partner. Without claims, products face a remarkable influencer equation that is especially important in a market where such a large share of products are bought online.

The role of influencers is profound. Consumers who are looking for beauty are not looking for products without those benefits called out on the label. Consumers seeking immunity want to see “immunity” spelled out. That is true everywhere, but influencers may be driving the discussion more broadly than in other markets. Yak-sa Go-Yak boasts 2 million subscribers on his “Pharmacist’s Story of Supplement Medicine YouTube channel where he often talks about US brands and biotics supplement. Jarrow and Now Foods biotics were mentioned on a recent show. Another YouTube channel, the “Pharmacist’s Daughter” brings biotics into the beauty from within conversation. In this environment, probiotics without specific claims struggle to get noticed.

On the claims front, ‘beauty-from-within’ is cited as an important component in the biotics market, but additional opportunities include immunity and weight control. Given the population’s “super ager” status, innovation-focused brands looking to invest in or partner with South Korean companies might keep an eye on healthy aging. The gut-aging axis is not well established, but the potential could be enormous.

Though imports represent a majority of raw ingredients supplying domestic brands, those imports are primarily generic strains that can offer very basic claims listed in South Korean regulations, and are not as likely to attract the attention of influencers on their own. South Korean brands are known to blend the commodity probiotics with patented strains developed in-country to make claims-ready finished products.



In countries where claims are not easy to obtain, even for domestic suppliers, market entry is never easy. The South Korean market is not alone in that. Partnering with in-country companies is essential.

Even with that requirement met, however, major probiotic companies have faced challenges. For those companies, the most interesting opportunity may go in the other direction.

While South Korea's consumer finished-product brands have historically stayed focused on the domestic market, the country is quietly building a global export foot-print in ingredient and contract manufacturing. What may be more interesting, however, is that South Korean ingredient companies are sitting on rich portfolios of novel, patented strains and advanced delivery formats similar to innovations increasingly being deployed in finished products in other markets. For global companies looking beyond domestic retail, B2B partnerships to license promising discoveries could be an overlooked opportunity with fewer regulatory obstacles.

Putting all of this together, South Korea exists as a market that could be described as complicated. So much of the action happens inside the country, with market entry far from easy, but that doesn't make it less attractive for the right company with the right strategy.

"Prime" doesn't mean "simple." And it's only prime when you make it so.

