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The South Korean Consumer

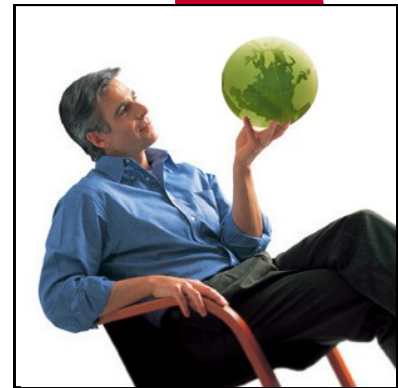
Behaviour, Attitudes and Perceptions Toward Food Products



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The South Korean Consumer

Behaviour, Attitudes and Perceptions Toward Food Products



▶ OVERVIEW

The lifestyle of today's sophisticated South Korean consumer blends both traditional and contemporary elements. Traditionally, South Korean consumers were homogeneous in nature, however they now appear to be rapidly embracing international influences, particularly with respect to food. Higher levels of education, travel abroad, international tourists, and technology, have all helped to broaden horizons and open the door to new and innovative products. In fact, Zagat has noted this expanding diversity by adding South Korea to its list of surveys and remarking on the diverse range of popular cuisines available in Seoul, in addition to its traditional Korean cuisine. South Korea is only the third Asian country to be covered by Zagat, after Japan and China (see sidebar "Zagat", page 17).

The Republic of Korea, more commonly referred to as South Korea, is divided into nine provinces, of which Jeju Province is a special autonomous region. The other provinces are: South Chungcheong, North Chungcheong, Gyeonggi, Gangwon, South Jeolla, North Jeolla, South Gyeongsang and North Gyeongsang. In addition to the nine provinces are major administrative districts consisting of a special city – Seoul – and six metropolises: Busan, Daegu, Incheon, Gwangju, Daejeon and Ulsan (Statistics Korea 2010).

Population demographics are expected to have an impact on the nature of food consumption in the coming years. One-person households are expected to represent one in every five households by 2015. As well, South Korea's population is aging rapidly. Coupled with increased life expectancies, seniors are expected to account for over 20% of the population by 2026 (Statistics Korea 2010). These factors could lead to increased demand for food products in smaller, convenient package sizes.

South Korea imports approximately 60-70% of its food requirements, and enjoys relatively good trade relations with Canada. In 2010, top Canadian exports to South Korea were cereals, meat, raw furskins, fish and seafood, and rapeseed. As South Korea's key imports in that period were cereals, fish, seafood meat, animal feeds, soybeans and other oilseeds, there may be additional opportunities for good quality Canadian products in these areas.

This report was prepared based on multiple sources of information and is intended to assist the reader in understanding who the South Korean consumer is, and the factors that influence their food-purchasing decisions. This general overview may be useful in supporting Canadian companies in the evaluation and design of a marketing strategy for entering this market for the first time, or expanding their existing position.

▶ INSIDE THIS REPORT

OVERVIEW	2
GLOBAL TRADE POSITION	3
DEMOGRAPHICS	3-6
Population	3
Ethnicity	4
Education	4
Households	4
Health and Lifestyle	5
Economy	5
CONSUMPTION AND EXPENDITURES	6-9
Expenditures Overview	6
Consumption Expenditures	9
KOREAN CUISINE	10-14
<i>Hansik</i> —Korean Food	10
Dining	11
Regional Cuisines	12
Preferences	13
TRENDS	15-21
Royal Cuisine	15
Health Cuisine	15
Street Food	16
Vegetarian and Temple Cuisine	16
International and Fusion Cuisine	17
Health and Wellness	18
Private Label	19
Internet Usage and Social Media	20
Environment	21
CONCLUSION	22
KEY RESOURCES	23-27



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▶ GLOBAL TRADE POSITION

The following section provides a brief overview of Canada's trade with South Korea. Unless otherwise noted, these statistics are sourced from Statistics Canada and Global Trade Atlas (2010), and the figures are stated in Canadian dollars.

- ▶ South Korea imports 60-70% of its food requirements and runs a significant food trade deficit. Its agri-food and seafood trade deficit was \$15.9 billion.
- ▶ Canadian agri-food and seafood exports to South Korea were valued at \$598.3 million.
- ▶ South Korea's key agri-food and seafood imports were cereals, fish and seafood, meat, animal feed, soybeans and other oilseeds.
- ▶ Key supplying countries were the United States, China, Australia, Brazil and Japan.
- ▶ Canada was South Korea's 6th largest supplier of agri-food and seafood products with 2.7% market share.
- ▶ South Korea ranked as the 6th largest market for Canadian agri-food and seafood exports.
- ▶ Canada had a large agricultural trade surplus of \$534.7 million with South Korea.
- ▶ Canada's top agri-food exports to South Korea were cereals, meat, raw furskins, fish and seafood and rapeseed.
- ▶ Free trade agreement negotiations between Canada and South Korea are currently underway.



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▶ DEMOGRAPHICS

POPULATION

The population of South Korea is estimated to be over 48 million (July 2010), almost three-quarters of whom are between 15 and 64 years of age. A further 11% are 65 years of age and over. The World Fact Book estimates the population breakdown as of July 2010 to be as follows (millions of persons):

Age	Male	Female
1-14 years	4.3	3.8
15-64 years	17.9	17.2
65 years and over	2.1	3.1

As in many countries, the senior demographic is expected to increase. By 2016, the number of seniors is expected to exceed the number of children under 15, and is expected to account for over 20% of the population in 2026 (Statistics Korea, 2009).

According to Statistics Korea, the life expectancy of the Korean male is 76.1 years (2007 estimate), which is equivalent to the Organization for Economic Cooperation and Development (OECD) average. For Korean women, the average is 82.7 years, which is almost a year more than the OECD average of 81.8 years. However, Euromonitor (January 2009) notes that Korean males are becoming more concerned about their health, which is increasing their life expectancy more rapidly than that of females. Conversely, Korean women are working more often, and adopting some of the unhealthier habits in which their male counterparts were engaged. This, in turn, has slowed the rate at which their life expectancy is increasing.

As of 2008, approximately 81% of the total population lived in urban areas (The World Fact Book, 2010).



ETHNICITY

The population of South Korea is very homogeneous where culture and language are concerned. Virtually all its people are of Korean descent, except for a Chinese minority of about 20,000. All South Koreans speak the same language and share a common cultural heritage (CIA, 2010). Nonetheless, various parts of the country are known for their different dialects, such as the Jeju dialect of Jeju Island and the Gyeongsang dialect spoken around the cities of Busan and Daegu (Korean Language).

EDUCATION

Education is highly regarded by the South Korean government and supported by the parents. As of 2008, 99% of school-age children attend elementary schools (Statistics Korea). Approximately 70% of high school graduates continue on to college or university. As a result, a high school diploma has become a minimum requirement, and a college education is becoming a common achievement.

According to the CIA World Fact Book, in 2007 South Koreans attended school on average for 17 years. The average for males is 18 years, while for females is 15 years. English is widely taught in junior and high school. However, Lonely Planet notes that in actual practice, written English is better understood by most Koreans than spoken English.



Source: Shutterstock

HOUSEHOLDS

Statistics Korea (2009) indicates that while the number of ordinary households¹ has increased from 6.6 million in 1975 to 14.3 million in 2000 and 15.9 million in 2005, the average number of household members has decreased from 5.0 in 1975 to 4.5 in 1980, 3.1 in 2000 and 2.9 in 2005. This is expected to further decrease to 2.7 persons by 2020. The number of households with less than 3 persons will increase, while those with more than 4 will decrease.

The biggest change is expected to be seen in the number of one-person households, which are forecast to account for one out of every five households in 2015 (Park, Kim and Ko, 2002). Two-generation households still remain the most common type. One-generation or one-person households are rapidly increasing, while the number of three-generation households is declining steadily. Euromonitor International attributes some of this change to higher divorce rates. Its data indicates that the number of divorced persons increased by almost 59% between 2000 and 2007 (Euromonitor, January 2009).

The changes in household structure are also affected by a trend towards later marriage. South Koreans are waiting longer to marry for the first time – the average age of women was 27.9 years in 2007 increasing from 25.4 years in 1995, while men were 30.7 years of age in 2007 up from 28.4 years in 1995 (Euromonitor, January 2009).

Not only are household sizes declining, but lifestyles are becoming increasingly busy. While Korean women are working more and longer hours outside of the home, they remain key purchasers of groceries and household goods, and are often responsible for decisions relating to education for their children. Indeed, the stresses of time scarcity and work-life balance, and the pressure to appear successful in the eyes of society, are keenly felt by South Koreans.

¹ Statistics Korea defines ordinary households as households consisting of family members, households consisting of both family members and 5 persons and less without blood relationship, households with 5 members and less without blood relationship, and one-person households.



Findings from Datamonitor Consumer Surveys, August 2008 and April/May 2009, showed that only 26% of South Koreans were satisfied with their work-life balance and amount of leisure time, compared to a global average of 43% and 49% in the U.S. As a result, it is not surprising that for 52% of South Koreans, convenience is viewed as a major consideration in their choice of food and beverage products (Datamonitor, September 2009). In light of this, one can expect an increased demand for foods in smaller package sizes and for foods featuring time savings in preparation, or convenience of use – particularly for households with busy lifestyles.

HEALTH AND LIFESTYLE

Disease is one of the health-related risks that is of increasing concern to health-conscious Korean consumers. As in many western countries, some of the leading causes of death and mortality are cancer, cerebrovascular diseases, heart diseases and diabetes. A 2008 study of 15 Asian countries conducted by Pfizer showed that among males and females in South Korea, stomach cancer had the highest incident rate. It was also the most common cancer found among females in China, and the most common among males in Japan.

Statistics Korea attributes a greater interest in health to increases in income and the accompanying improved living standards, in addition to better understanding, promotion and education about health-related risks. As a result, fresh and healthy foods and their preparation in healthy ways, such as using less fat and salt, are becoming increasingly important to South Korean consumers (Euromonitor, January 2009).

Busier lifestyles are also impacting consumers. Time-challenged households cope by consuming more packaged foods and take-away meals, often combining healthy packaged food options that are made with quality ingredients, with prepared vegetables and meat (Euromonitor, January 2009).



Source: Planet Retail Ltd.



Source: Planet Retail Ltd.

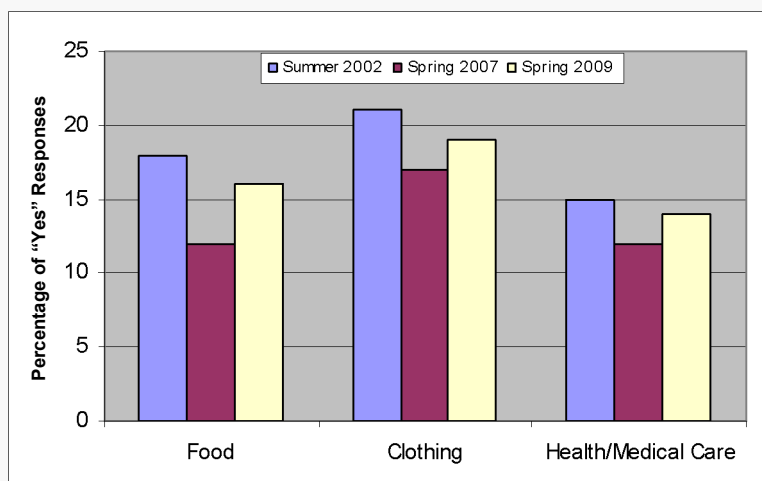
ECONOMY

The agriculture share of South Korea's gross domestic product (GDP) is small at 3%, but the sector still employs about 7% of the labour force. Agriculture is declining in economic importance due to growth in the service and manufacturing sectors. Approximately two-thirds of farm income comes from subsidies or trade protection. South Korea's agriculture industry has many inherent challenges. It is a mountainous country with only about 17% arable land and less rainfall than most other neighboring rice-growing countries. With a relatively affluent population of over 48 million, South Korea offers a large market for agri-food products (CIA World Fact Book).

The 2009 Pew Global Attitudes Project report shows increased optimism over 2008 regarding South Koreans' views of their personal economic situation. Those who view their situation as good or very good increased from 31% in spring 2008 to 39% in spring 2009; those viewing their situations as somewhat bad to very bad decreased from 67% to 59%. Despite the optimism, about one out of five South Koreans have had occasions in the past year where they did not have enough money to purchase food, clothing or medical and health care needed by their families. While lower than in 2002, these levels are higher than those noted in 2007 (Figure 1).



Figure 1: Percentage of population who did not have enough money to purchase specific necessities for their families



Source: *The Pew Global Attitudes Project, July 23, 2009*

► CONSUMPTION AND EXPENDITURES

EXPENDITURES OVERVIEW

The living standard and food consumption patterns of Korea have seen rapid changes as a result of improvements to the economic status of Korean households, increases in personal incomes and the adoption of western lifestyles.

Analyses of Korean national nutrition survey data from 1969 to 1995 by Jin Soon Ju (2000) and Sook Mee Son (2003) noted decreases in daily per capita consumption of rice and cereals. While vegetable consumption was relatively stable over the same time period, the intake of fruit, meat, eggs, milk and fish increased dramatically, ranging from a 3-fold increase for fruit to a 22-fold increase for milk.

According to Statistics Korea, annual per capita rice consumption for households in the 2009 food grain year (November 1, 2008-October 31, 2009) was 74.0 kg, a decrease of 1.8 kg (2.4%) over the previous year. Overall, annual per capita rice consumption has declined by 22.9 kg since 1999. This downward trend is partly explained by agricultural policies undertaken by the government in the 1970's in an attempt to attain rice self-sufficiency. As a result of these policies, rice production and consumption were limited at times; consumers were encouraged to consume less rice, and to mix barley and wheat with rice to further conserve rice use. Furthermore, the use of rice for most processing purposes was forbidden. Government control of rice stocks meant no imports or exports of rice for several years. Over time, this led to higher consumption of wheat-based products (Statistics Korea, 2010; D Gordon Development, 2010).

Today's South Korean consumers are very conscious of the quality of their rice and now pay more for domestic rice than they would for high-quality imported rice (United States Department of Agriculture, Economic Research Service [USDA ERS], 2010). Indeed, most people still prefer to eat steamed rice at least once a day, which is made possible in time-challenged households by the use of electric rice cookers (Euromonitor, January 2009). As a result, the ever-increasing variety of processed foods and rice substitutes, such as bread and noodles, and the convenience that these alternatives offer to time-challenged households, make them increasingly popular choices (Lee, Hyo-sik, 2010).



However, in 2003, the South Korean Ministry for Food, Agriculture, Forestry and Fisheries and the Korea National Council of Consumer Organizations commenced quality control evaluations of local rice brands in order to increase per-capita rice consumption. This has given rise to innovative new rice brands with specific health or environmental benefits. For example, rice from Muan County in South Jeolla Province, which is treated with a coating made from onions and other herbs effective in lowering cholesterol, and Cheongwon Rice from North Chungcheong Province that is grown in an environmentally-friendly way, using freshwater snails instead of pesticides (Kim, Hee-sung, 2009).

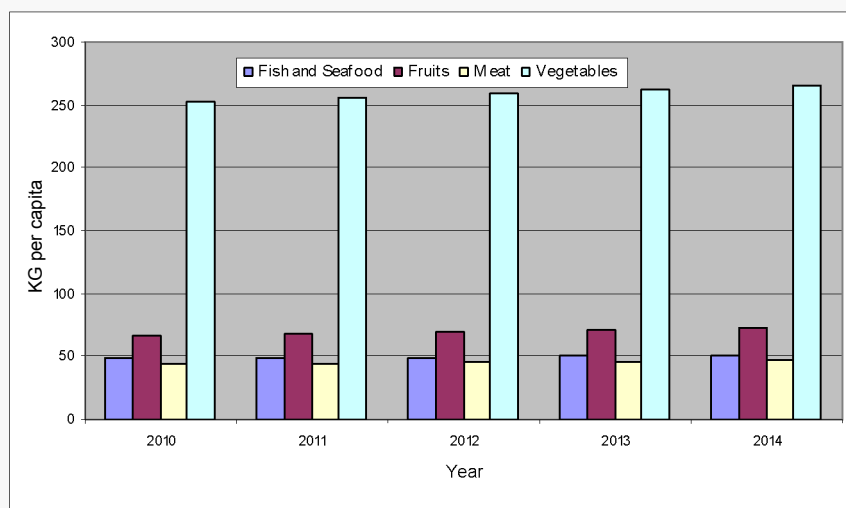


Source: Planet Retail Ltd.

In contrast, vegetable consumption has trended in the opposite direction. An analysis of the 1998, 2001 and 2005 Korean National Health and Nutrition Examination Surveys in the British Journal of Nutrition (Lee and Kim, 2010) showed that the proportion of daily vegetable consumption in relation to total food intake increased from 24.0% in 1998 to 24.8% in 2001, and 27.2% in 2005. In that timeframe, daily vegetable consumption by men increased by 23.2 grams (g), and by 20.7 g for women. With respect to meals, consumption did not change for breakfast, but did increase for lunch and dinner for both men and women. In addition, the vegetable consumption ratio at restaurants and in cafeterias increased by similar amounts for men and women in 2001 and 2005 over 1998. Not surprisingly, findings showed that Koreans consume a large proportion of fermented vegetables. The national staple and most famous of South Korean dishes is *kimchi*, which is a pungent mixture of fermented vegetables and spices (see sidebar, “*Kimchi*,” page 11). Daily intakes of *kimchi* in 1998, 2001 and 2005 were 131.8 g, 136.3 g, and 129.1 g, respectively.

Lee and Kim’s study noted that although the ratio of daily consumption of *kimchi* to total vegetable consumption had decreased, it was accompanied by an increase in fresh vegetable consumption over time. This is consistent with per-capita sales data from Euromonitor International. Sales of vegetables from 1998 through 2009 also show an upward trend of 203.6 kg to 250.0 kg, respectively. Sales projections for 2010 to 2014 show a steady per-capita increase for vegetables, as well as for fish and seafood and meat, and fruit (Figure 2). Sales of pulses have been constant at 1.7 kg per-capita from 2004 through 2009, and are expected to remain constant through 2014.

Figure 2: Projected Sales of Fish and Seafood, Fruits, Meat and Vegetables, 2010-2014



Source: Euromonitor International 2010



Pork is the most popular meat consumed by Korean diners, often as *bulgogi* (barbecued marinated meat) or *galbi* (barbecued ribs); chicken is also popular. Although less commonly consumed and more expensive (USDA ERS, 2009), beef is commonly used in *bulgogi* and *galbi*, and also forms the basis for the popular *seolleongtang* (ox bone soup) (Morell and Enig; Korea Tourism Organization, 2008a).

In May 2003, South Korea imposed a ban on imports of Canadian beef as a result of an outbreak of Bovine Spongiform Encephalopathy (BSE). Prior to the ban, Canada was South Korea's fourth-largest supplier of beef and beef products, after the United States, Australia and New Zealand (Global Trade Atlas). At their peak in 2000, Canadian beef exports to South Korea were worth just approximately \$84.3 million (Statistics Canada, 2011).

The USDA's Foreign Agricultural Service (FAS) noted that approximately half of the 545,000 metric tons of beef consumed in South Korea in 2009 was imported. Domestic beef consumption is expected to continue an upward trend, spurred on by factors such as beef traceability and country-of-origin labelling in restaurants and the increasing popularity of butcher-shop style restaurants (GAIN Report KS1003).

Koreans enjoy a variety of beverages in their diets, from teas, such as *Insam cha* (Korean ginseng tea), *Saenggang cha* (tea made from ginger root) and *Bori cha* (roasted barley tea), to liquors such as *Soju* (a clear spirit made from grain or sweet potatoes, where the grain-based *Soju* is considered to be a superior product) and *Yakju* (a refined pure liquor fermented from rice). The best known liquor is *Soju* (New World Encyclopedia, 2009).



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CONSUMPTION EXPENDITURES

Overall annual consumption expenditures for households of two or more members increased from 2007 to 2008 in all categories except for the culture and entertainment category which saw a decrease of 2.2%, and communications, which decreased 1.5%. The greatest expenditure increases were seen in education and fuel (8%), and light and water charges (6.3%). Expenditures for food overall increased by 5.3% from 555,600 won (CAD\$593) to 584,800 won (CAD\$624), while expenditures for eating out increased 3.7% from 257,900 won (CAD\$275) to 267,400 won (CAD\$285) (Table 1, Statistics Korea 2009).

Table 1: Summary of Annual Consumption Expenditures for Households of Two or More Members, 2007-2008

Category	1,000 won		CAD\$		% change
	2007	2008	2007	2008	
Total Consumption Expenditures	2,211.6	2,290.4	2360.88	2445.00	3.6
Food	555.6	584.8	593.10	624.27	5.3
(Eating Out)	257.9	267.4	275.31	284.45	3.7
Housing	75.2	76.9	80.28	82.09	2.3
Fuel, Light and Water Charges	107.8	114.5	115.08	122.23	6.3
Furniture and Utensils	97.3	98.6	103.87	105.26	1.3
Clothing and Footwear	114.6	115.3	122.34	123.08	0.6
Medical Care	118.7	119.7	126.71	127.79	0.8
Education	256.4	276.8	273.71	295.48	8.0
Culture and Entertainment	107.8	105.4	115.08	112.51	-2.2
Transportation and Communications	385.9	394.4	411.95	451.02	2.2
(Communications)	133.5	131.5	142.51	140.38	-1.5
Other Consumption Expenditure	392.4	404.1	418.89	431.38	3.0
(Miscellaneous)	301.9	313.0	322.28	334.13	3.7

Source: Statistics Korea, 2009

Note: CAD\$ conversion rate = 0.0010875, 2-year average of Bank of Canada Year Average of Exchange Rates for (0.001156) and 2008 (0.000979)

While the highest proportion of total consumption expenditure is spent on food by households where the head of household is age 60 or over (29.1%), the highest proportion spent on eating out is by households where the head of household is age 29 or under (13.5%), followed by age 50-59 (12.1%) (Table 2, Statistics Korea, 2009).

Table 2: Food Share (%) of Total Consumption Expenditure by Age of Household Head, For Households of Two or More Members, 2007 and 2008

	Age of Household Head				
	29 or Under	Age 30-39	Age 40-49	Age 50-59	60 or Over
Food	25.3	24.8	24.8	25.7	29.1
(Eating Out)	13.5	11.9	11.9	12.1	9.2

Source: Statistics Korea, 2009



HANSIK - KOREAN FOOD

Korean food is commonly called *hansik*. With the evolutions in dining afforded by new food offerings, breakfast for today's urban Korean consumer may consist of Western-style foods such as toast, eggs and milk. The following historical overview is outlined by Korea Agro-Fisheries Trade Corporation (2008). Traditionally, a light meal known as *Juksang* was often served at daybreak. Pungent and salty foods are not usually served with this meal. Foods that are liquid in texture, such as porridge, mild broth and thin gruel, are usually served with foods that are not as pungent, like watery *kimchi*, salted-fish juice soup and dry salt dishes (dried fish and beef jerky, for example).



Source: Shutterstock

Lunch is often a meal of noodles – *Jangguksang*. The main dish is often warm noodles, cold noodles, rice cake soup or dumpling soup. This is typically accompanied by vegetables with mustard sauce, *Japchae* (sweet potato noodles mixed with sliced beef and vegetables), sliced boiled meat, pancakes, cabbage *kimchi*, radish *kimchi* and raw vegetables.

Where liquor is served, side dishes are determined by the type of liquor served and the preference of the guest. For an ordinary liquor table, one would normally serve pancake, sliced boiled meat, raw vegetables, *kimchi* and a few dry foods. When refined rice wine is served, one can expect to dine on dry foods such as beef jerky, fish jerky, dried fish and roe, one or two spicy dishes such as pancake, sliced boiled meat, steamed dish, *sinseollo* (royal hot pot) and stew, in addition to raw vegetables, *kimchi* and fruit. Hot soups such as spicy red pepper paste stew, spicy fish stew and hot pots can be added depending on diner preference.

Kimchi

The one thing that many Koreans declare they cannot live without is *kimchi*, which is likely the most famous of South Korean dishes. Known for its spicy flavouring and pungent smell, this national staple is made by fermenting vegetables, such as salted cabbage or daikon radish, with seasonings that may include garlic, ginger and red-pepper powder (Korea Tourism Organization, 2010). Originally developed as a way to preserve vegetables over the long winter, *kimchi* is eaten daily, in some cases at every meal. Vegetables such as nappa cabbage, turnip, cucumbers and spring onions seasoned with pepper and fish paste were once fermented in clay pots buried in the soil, but now *kimchi* refrigerators are used (Korea4Expats.com, 2010).



Source: Shutterstock

Kimchi has a history of over 4,000 years, and its popularity ranges from Japan to Korea and from northwest and southeast Asia, where it is said that each person consumes between ten and fifteen kilograms of *kimchi* a year. Historically, families would make enough to last all winter, storing the earthenware jars of *kimchi* underground to allow it to ferment – a practical and social activity. The recipe for each family's distinctive flavour of *kimchi* would be handed down from generation to generation. Indeed, the quality of *kimchi* was often the basis on which to evaluate one's housekeeping skills (AsianInfo.org, 2010). Today, the numerous recipes present a challenge to modern-day food processors that attempt to make portable versions of this iconic dish to meet the increasing demand for prepared *kimchi*. Indeed, Rodriguez (2008) points out that the demand for prepared *kimchi* is much higher than the supply, part of which is currently being imported from China. A similar challenge was faced by researchers in the development of a specially sterilized version for use by South Korea's first person in space (Demick, 2006).



Source: Planet Retail Ltd.

Korea's love for *kimchi* and its importance as a cultural icon is very evident in The *Kimchi* Museum, which was originally built in Pil-dong, Jung-gu in 1986 by Pulmuone Inc., a South Korean producer of perishable foods such as tofu and soybean sprouts. Here, one can find exhibits on the history, types, making and storing, and nutritional aspects of Korea's best known food (Korea Tourism Organization, 2009b).

In addition to its cultural importance, *kimchi* was recognized as one of the world's five healthiest foods in 2008 by Health Magazine, along with olive oil, yogurt, soy and lentils. As *kimchi* is primarily made of fermented cabbage, it is rich in lactobacilli which help digestion. It also contains high levels of vitamins A, B, and C, and has a high fibre content which aids bowel function (Demick, 2006).



For *Gyojasang*—special occasions such as holidays, feasts or large gatherings of people—numerous dishes prepared with high-quality ingredients are not always the norm. In such instances, meals are not planned for quantity of dishes, but for an overall harmony of colour, ingredients, cooking methods and nutrition of select core main dishes, in addition to a few accompanying dishes.

DINING



Source: Shutterstock

In South Korea, dining is not a simple activity. Meals are planned using a colour scheme representing the five elements to achieve optimal attractiveness, with respect to the visual appeal of the dish, as well as health. Water, wood, fire, metal and earth are represented by food colours yellow, green, red, white and black, respectively. Janet Shin (February 2010) describes the five elements as “hidden codes of Korean culture. They are well known and ingrained in Koreans’ daily lives, instead of being learned as a difficult philosophical concept.” The basic tastes of a food, referred to as seasonings, are also grouped into five categories: salty, sweet, sour, spicy and bitter (Korea Tourism Organization, 2008d).

Garnishes are used to enhance the attractiveness of a dish and stimulate one’s appetite. The basic colours are incorporated into daily meals and banquet cuisines. Traditional Korean foods are steeped in historical significance. An average meal normally consists of *bap* (steamed rice) or *juk* (porridge), *guk* (soup) and typically an odd number of side dishes, known as *banchan*. For those who have limited resources or access to food, there would usually be three side dishes, not including the rice, soup, *kimchi*, sauce and stew, while five side dishes would be common for those who are more prosperous. Side dishes may include *jjigae* (stew), hot pot, raw or cooked vegetables, roasted and/or hard-boiled meat or fish, pancakes, dried food or salted fish (Korea Agro-Fisheries Trade Corporation; Korea Tourism Organization, 2008b; Allo’ Expat South Korea, 2010).

In addition to *kimchi*, a number of Korean dishes are popular in countries around the world. The following are some of the most well-known dishes:

- ▶ **Bibimbap**: Cooked rice served in a hot or cold bowl, topped with a colourful variety of vegetables, meats and egg, and mixed with hot pepper sauce.
- ▶ **Bulgogi**: Thinly-sliced beef or pork seasoned in a soy sauce marinade, and then grilled.
- ▶ **Galbi**: Beef or pork ribs sliced into easy-to-eat portions, marinated and grilled.
- ▶ **Samgyetang**: An invigorating soup made from a chicken that has been stuffed with glutinous rice, ginseng, jujube (Chinese red dates) and garlic.
- ▶ **Naengmyeon**: *Pyeongyang* style *naengmyeon* are buckwheat noodles in a cold beef broth, while *Hanheung* style *naengmyeon* noodles are made from potato starch or sweet potato starch.
- ▶ **Japchae**: This dish, which is popular at feasts or during festive days, is made by combining pan-fried vegetables with sweet potato noodles (*dangmyeon*).
- ▶ **Sinseollo**: A variety of ingredients in a kind of hot pot, cooked by pouring broth and boiling them together.
- ▶ **Haemultang**: A stew made from various seafood which are boiled with red pepper paste and red pepper powder.



Source: Shutterstock

The versatile soybean is extensively used in numerous forms throughout South Korean cuisine, as well as other Asian cuisines, including whole soybeans, *dubu* (tofu), *kongnamul* (soybean sprouts), and soy milk. In addition, soybeans also form the basis for fermented condiments collectively called *jang*, the most popular of which include the soybean pastes *doenjang* and *cheonggukjang*, a chili pepper paste known as *gochujang*, and a soy sauce called *ganjang* (Soyfoods Canada; Sunchang, 2008).



REGIONAL CUISINES

While the population of South Korea is homogeneous in its ethnic background, there are nationwide differences in food preferences and cooking styles. This culinary diversity reflects historical provincial boundaries that preserved local food and culinary traditions, in addition to considerations of climate and the availability of fresh ingredients. The following briefly outlines some of the distinguishing characteristics of the regional cuisines (Kim, Yong-ja, 2010; Vegetarian Times, 2003; SouthTravels.com; Haikou Foreign and Overseas Chinese Affairs Office; Korea Tourism Organization, 2008a).

Gangwon province

- ▶ Cuisine in Gangwon province is characterized by plain and simple dishes, typically made with potato, corn, buckwheat or seafood.
- ▶ These crops are reflected in regional dishes such as *japgokbap* (steamed rice with a variety of grains), *Chuncheon makguksu* (*Chuncheon* style cold buckwheat noodles with vegetables), *sujebi* (soup with pulled dough morsels), *songpyeon* (half-moon rice cake) or buckwheat *chongtteok* (rolls of pan-fried buckwheat dough filled with seasoned radish).



Source: Shutterstock

Gyeonggi province

- ▶ Gyeonggi province borders Seoul, and residents obtain fish and seafood from the Yellow Sea in the west, and vegetables from the mountains surrounding Seoul. Mountain vegetables are historically Korea's functional foods – wild mountain plants, such as bellflower roots, wild asters and fernbracken sprouts have been consumed for their health benefits since ancient times.
- ▶ Popular dishes include *joraengi* (rice cake soup), *beombeok* (thick mixed-grain porridge), *kalguksu* (hand-made noodles), and *naengkongguk* (cold soybean soup).

Seoul

- ▶ As the seat of the royal court, Seoul was the centre of dishes that demonstrated the riches of the country's agricultural products, earning a reputation for elaborate dishes and precise dining etiquette. While many seasonings may be used, dishes are generally mild in taste.
- ▶ Typical dishes include *seolleongtang* (ox bone soup with rice), *sinseollo* (royal hot pot), *gujeolpan* (eight varieties of meat and vegetables that are served with thin pancakes in a nine-sectioned dish, and *tangpyeongchae* (mung bean jelly mixed with vegetables and beef).

North and South Chungcheong provinces

- ▶ Chungcheong benefits from its geographical diversity with the availability of fresh seafood from the Yellow Sea and the production of grain crops, such as rice and barley.
- ▶ Local cuisine is mildly seasoned and simple in appearance. A freshwater shellfish known as *olgaengi* is often enjoyed in various soups or stews, or boiled and seasoned when served with drinks. Dishes enjoyed here include *cheonggukjang* (thick soybean paste soup) and *eoriguljeot* (oysters that have been stored in salt and seasoned with fine chili powder).

North and South Jeolla provinces

- ▶ This cuisine is known for a rich and sumptuous style often compared to that of Kaesong cuisine, one that preserves the unique culinary tradition of the *Yangban* (noble class) of the Joseon Dynasty.
- ▶ Close to the Yellow Sea and East China Sea, in addition to the fertile Honam Plain, the location provides a range of available foods, from a diversity of fresh seafood to grains and mountain vegetables.
- ▶ The food here is known for its spicy, salty and pungent seasonings, such as salted fish, chili powder and spices.
- ▶ Typical dishes include *Jeonju bibimbap* (*Jeonju* style mixed rice with vegetables), *Jeonju* bean sprout soup with rice, and *hongtaksamghap* (fermented thornback fish, sliced boiled pork and sour *kimchi*).



North and South Gyeongsang provinces

- ▶ Although these provinces each border the Sea of Japan and the East China Sea, different types of fish and seafood are harvested in each province.
- ▶ *Hoe* (raw seafood) is frequently enjoyed, as well as fresh ocean fish which is served raw as sashimi, or served steamed, broiled or cooked in soups.
- ▶ Gyeongsang cuisine is generally salty, spicy, pungent and sweet, and often combined with herbs and Chinese pepper for a unique aroma. Bean pastes, such as *makjang* and *dambukjang*, are also popular seasonings.
- ▶ Popular dishes include *bibimbap* (rice mixed with vegetables), *Dongrae pajeon* (seafood and green onion pancake), and loach soup.

Jeju Island

- ▶ Rice farming on Jeju Island is limited by the lack of fresh water. Instead, barley, millet, barnyard millet, buckwheat and sweet potatoes are more commonly produced. As a result, grain dishes are popular, such as *japgokbap* (steamed multiple grains).
- ▶ Abalone and mandarin oranges are considered specialty products of Jeju Island.
- ▶ Jeju cuisine uses few seasonings but is generally salty, likely to prevent food from spoiling in the warm weather. Jeju residents do not need to prepare large amounts of *kimchi* to preserve vegetables to last through the winter, as their climate is not as harsh as in the northern regions of the country.
- ▶ Typical dishes include *jeonbokjuk* (porridge made with abalone), *okdomjuk* (porridge made with Red tilefish), and *bingtteok* (pan-fried rolls of buckwheat dough filled with white radish slices).



Source: Shutterstock

PREFERENCES

The Pew Global Attitudes Project 2009 shows that 92% of South Koreans agreed that trade and business ties are good for their country. Despite this support for globalization, respect for tradition and ingrained cultural thinking is also reflected in the concern expressed by South Koreans that their way of life needs to be protected against foreign influence. A statement expressing this concern in the Pew study shows a 9% increase in agreement in 2009 (79%) over 2007 (70%).

Yu-Na Kim Honorary Ambassador of Korean Food

On February 25, 2010, the eyes of the world were trained on Vancouver's Pacific Coliseum as Yu-Na Kim captured South Korea's first ever Olympic figure skating title (AFP, February 25, 2010). Soon afterwards, she was also recognized as one of TIME Magazine's 100 Most Influential People in the World for 2010. As a much-beloved national celebrity, Yu-Na Kim was named an honorary ambassador of Korean food by the Ministry for Food, Agriculture, Forestry and Fisheries during the 2010 International Food Industry Exhibition held in Ilsan, South Korea. She is known to prefer Korean food when travelling, particularly "*galbi*" and "*kimchi jigae*" — braised short ribs and pot stew made with *kimchi* (Kim, Tae-gyu, 2010). After her Olympic gold-medal win, the 19-year old sports icon is often referred to as "Queen Yu-Na" by the media, and her popularity makes her a very influential spokesperson for Korean food.

While this viewpoint demonstrates that the population is essentially homogeneous in nature, tastes are nevertheless evolving, and consumers are becoming increasingly sophisticated and open to adventurous or international influences. Datamonitor found that in a period of six months, about one-third of consumers (34%) claimed that they had tried food and drinks that they hadn't tried before, and almost one in five (18%) had made efforts to try new food and drinks. The major influencing factor for over half of consumers (56%), and a medium influence for an additional 40%, was the choice and availability of a range of products from which to choose (Datamonitor, December 2009c).



In its *Global Consumer Trends: Comfort* survey, Datamonitor (September 2009) also found that grocery products of local origin figure prominently in consumer choice, despite the increasing popularity of experiencing new food and drinks. Almost eight out of ten (78%) South Korean consumers feel it is important or very important to know the origin of the grocery products they purchase, as opposed to the rating given by their global counterparts of 64%. Moreover, 55% of South Koreans consider country of origin to have a high or very high amount of influence on their choice of food and beverage products, versus only 35% of global consumers.



Source: Planet Retail Ltd.

As a result, choosing grocery products produced locally in the region where they live is considered to be important or very important to almost half of consumers (49%), while almost seven in ten consumers (68%) considered this knowledge to be more or significantly more important than it was two years ago. These figures are relatively consistent with the overall global ratings of 55% and 59%, respectively (Datamonitor, September 2009).

However, with an estimated 60-70% of all consumed food being imported, the ability to purchase locally produced food is limited. This may explain why only one in five South Korean consumers (21%) typically attempts to buy locally produced food and drink products, all or most of the time. Despite this low tendency, only 14% of consumers consider imported food products and ingredients to be completely or somewhat trustworthy, lower than the overall global average of 24% (Datamonitor, September 2009).

In March 2010, the South Korean government launched a voluntary tracking system to provide information on where imported cattle was born, raised and butchered. This beef traceability system became mandatory at the end of 2010, and consumers can access this information through a state-run website (Abey, 2010). A similar mandatory traceability system for domestic beef has been used since June 2009.

A 2007 study by Hyun Joung Jin noted that changes in consumers' preferences for meat coincided with two major events – a 2001 BSE outbreak in Japan, and the Asian financial crisis of 1998. The demand for meat was also adversely affected by the 2003 BSE outbreak in Canada and the United States (previously major suppliers of beef to South Korea), the 2001 BSE outbreak in Europe, as well as by the financial crisis experienced by South Korea in November 1997. Despite these setbacks, meat consumption has slowly increased from 42 kg per-capita in 2003 to 43.7 kg per-capita in 2009.



Source: Shutterstock

In addition to a preference for locally produced foods, Datamonitor found that food or drink that is marketed as authentic, home-made or original is considered to be appealing by 57% of South Korean consumers, and that 25% would make more or significantly more effort to choose such products (Datamonitor, December 2009b). Canadian food products that meet the food safety and quality expectations of South Korean consumers have a good possibility of acceptance in this challenging market.



ROYAL CUISINE

Michael Pettid, author of *Korean Cuisine: An Illustrated History*, explained to Julia Moskin of the New York Times, that Royal or court cuisine has become trendy in the past few years as more people can afford to eat foods once reserved for the elite. In addition to consumer prosperity, South Korea has experienced a resurgence of interest in Royal Cuisine and Health Cuisine, also as a result of the very popular television drama *Dae Jang Geum* (English title: *A Jewel in the Palace*, 2003-2004). This is the story of the first and only woman in history to successfully rise to the position of physician to the king of the Joseon Dynasty, breaking through the rigid hierarchy and male-dominated social structure, and highlighting the importance of Health Cuisine.

While this story in itself is notable, the series showcased that era's traditional food use through visual presentations of food preparations for the Royal Court and in royal cooking competitions, and through storylines that highlighted the importance of Health Cuisine, featuring food as an integral element of health and medicine. Royal Cuisine is not the only aspect of Korean culture to benefit from the popularity of this series; the drama has been translated into several languages and broadcast in several countries around the world, drawing tourist fans to the filming locales (Korea Tourism Organization 2009a). The renewed popularity of Royal Cuisine was showcased in a special exhibition of Royal Court Food presented at the 2005 Asia-Pacific Economic Council meeting in Busan (Lee, Hyo-won, March 2008) and at a Korean Food Festival at the United Nations headquarters in New York in 2007 (The East Journal, 2009).



Source: Shutterstock

Royal dining is not simply a matter of rich and expensive foods. As a matter of course, the king's meals would consist of foods and dishes from various regions of the country. More than just a showcase, the foods were an indication of the conditions of the crops and the land over which he governed. The food would be mildly seasoned, even bland, in order to bring out their natural flavours, and to enable the king to sample each of the numerous dishes at each meal. The Institute of Korean Royal Cuisine was established to continue the traditions of Royal Cuisine through education and promotion (Oh, 2010). Modern versions of *sinseollo* (royal hot pot) and *gujeolpan* (eight varieties of meat and vegetables that are served with thin pancakes in a nine-sectioned dish) continue to be enjoyed in many regions of Korea (Korea Tourism Organization, 2008a, 2008e). In addition, the opulence and intricacy of dining in the Royal Court fashion can be experienced in high-end restaurant banquets (Allo' Expat South Korea, 2010).



Source: Shutterstock

HEALTH CUISINE

Health Cuisine, which lies at the heart of Korean cooking, is guided by the belief in the medicinal properties of a variety of food, beverages, seasonings and spices, mineral water and liquors. For example, their abilities to prevent certain health conditions, maintain good health, or treat specific health issues, such as diabetes. While Royal Cuisine ranges from simple to elaborate, the perceived health attributes of the foods consumed are never far from mind. It is believed that health can be achieved by consuming food that is a harmonious combination of the blessings of nature, as represented by the five elemental colours. Dishes and ingredients are often selected with the health benefits and their compatibility with other foods in mind (Chon, 2002). Korean ginseng is the most well-known of foods consumed for its

health benefits, and has been cultivated and consumed for centuries in Korea for restorative rather than curative purposes. It is reputed to strengthen organs, stimulate the heart, protect the stomach, enhance stamina and calm nerves (Korean Overseas Information Service).



Source: Shutterstock



Source: © Joanne Treidlinger, 2010

STREET FOOD

On the informal side of dining, South Koreans often go to the *pojangmacha* (street vendor) for quick snacks that are eaten on the spot, or wrapped to take home. At night, these vendors sell food from small tents that fill the streets; others sell from carts, trucks or vans that can be easily relocated. The wide food selection ranges from typical Korean foods to fusion foods, from foods on sticks known as “finger foods” that are made to be easily consumed while standing, to foods that are more easily consumed while seated, or foods accompanied by drinks. Popular options include Korean sausage stuffed with rice cake, buttered squid, Korean BBQ Chicken Skewers, Korean Chicken Donairs, and Turkish Ice Cream. *Pojangmachas* emerged as a result of the Asian economic crisis around 1997, but street dining has developed into an informal social activity. Street foods are often inexpensive and are increasingly popular with busy consumers and tourists alike (Korean Restaurant Guide, 2003; Tan, 2009; Mijune, 2010).

VEGETARIAN AND TEMPLE CUISINE

South Korean cuisine offers many vegetable dishes, made from daikon radish, nappa cabbage, sweet potato, spinach, zucchini, mushrooms, soybeans and lotus root, just to name a few. *Dubu* is a mainstay of many vegetarian dishes, popular for its high protein content and availability in a variety of forms, and from soft to firm textures (Korea Tourism Organization, (n.d.); Soyfoods Canada).

Vegetarian dining can sometimes pose a challenge, however, because contrary to their name, “meatless” dishes may be prepared with seafood, as it is not considered to be meat by Koreans. Also, in many parts of Asia, “vegetarian” only refers to dishes without red meat, so they may be found to contain pork or chicken, or may even be garnished with small amounts of meat or fish. Even *kimchi* can be made with fish sauce. However, increased interest in vegetarian dining is helping to raise the popularity of Korean temple or monastery cuisine restaurants. According to the Jogye Order of Korean Buddhism, temple cuisine does not use any animal products except milk and milk products. Also excluded are alcohol and the “five pungent vegetables,” which are onions, garlic, chives, green onions and leeks (Ellenbogen, 2010; Jogye Order of Korean Buddhism).



Source: © Joanne Treidlinger, 2010



Source: Planet Retail Ltd.



INTERNATIONAL AND FUSION CUISINE

The availability of modern transportation and foreign foods has allowed regional cuisines to overlap and evolve, while maintaining the integrity of many unique traditional dishes. The historical, geographical and cultural influences of Chinese, Japanese and American cuisines can be seen in “fusion” food. In fact, one of the most popular Korean dishes is *Budae-chigae*. Its origin is attributed to the American army camps set up during the Korean War. At that time, food was scarce, and meat was scarcer still, but Spam and hot dogs were available from the army camps - when seasoned with red pepper paste and combined with *kimchi*, vegetables and noodles, a spicy stew was created - perhaps the original “fusion” food (Miller, 2009). Another South Korean dish, *Jajangmyeon*, was adapted from a Chinese noodle dish consisting of wheat noodles, a black soybean paste, diced meat or seafood, and vegetables. It is so popular that a new museum honouring *Jajangmyeon* is being established in Incheon City’s Chinatown in 2011 (The Chosun Ilbo, 2009).

The New World Encyclopedia (2009) notes that Chinese, northern Italian, French and Indian fusion restaurants are becoming popular in South Korea, while vegetarian restaurants can be found in most cities.

January 2010 saw the inclusion of South Korea in the Zagat survey (see sidebar, this page), the third Asian country after Japan and China to be covered (Lee, Hyo-won, 2010). A new guide features 287 diverse restaurants in Seoul, ranging from traditional Korean cuisine to the most popular (Ganga’s Indian cuisine), best ambiance (Naos Nova in Yongsan), and best service (Continental), while Ristorante Eo (Italian food in Cheongdam-dong) received ratings for best food. Ratings by 4,398 Seoulites formed the basis of this Zagat survey, which is another indication of the growing acceptance of international cuisines in South Korea.



Source: Planet Retail Ltd.

The Zagat Survey

Started in 1979, the Zagat Survey is a world-renowned guide for travel and food information. Rather than relying on the opinions of one or two critics, its reviews are based on the shared opinions of thousands of consumers who provide information on where they eat, drink, stay and play worldwide. Zagat guides now cover restaurants, hotels and other leisure categories in over 100 countries around the globe, and reviews are accessible through several media platforms including mobile devices, internet, TV and radio (Zagat, 2010).



Source: Planet Retail Ltd.



HEALTH AND WELLNESS

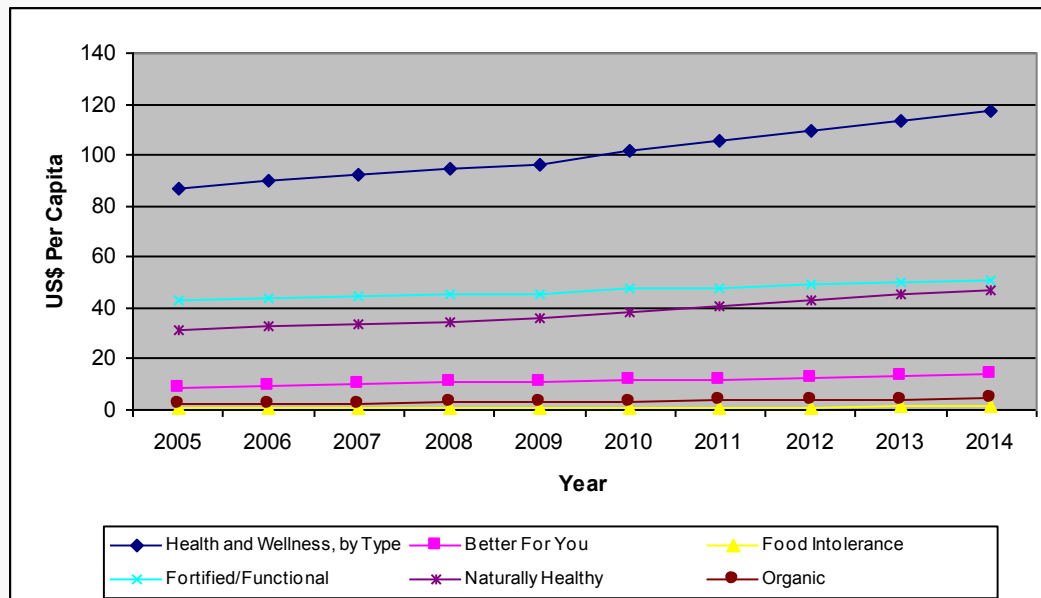
In addition to foods traditionally consumed to prevent, maintain, or mitigate certain health conditions, South Korean consumers have access to a wide variety of food products that are geared toward changing interests and modern lifestyles. As a result of past food safety issues, such as BSE and melamine-contaminated milk in China, among others, South Korean consumers are increasingly concerned about the quality and safety of food ingredients and products. However, with their long history of consuming food for its health benefits, the modern concept of foods that are healthy and better-for-you resonates with South Korean consumers.

Organic food products are popular with health-conscious consumers and are viewed favourably as they are seen to be free from pesticides, chemicals and biological contaminants. Domestically produced and processed organic foods include yogurt, green tea, ginger powder, milk and strawberry jam (Department of Primary Industries, 2009).

The recession had a mixed impact on organic food products. While over half (54%) of South Korean consumers made no more or less effort to save money by reducing usage of organic food and drink products and ingredients, 27% made more effort and 19% made less effort in this regard (Datamonitor, June 2009). Sales of organic rice, however, remain strong and continue to rise as locally produced organic rice is perceived to be of premium quality (Euromonitor, 2010c).

However, organic packaged food experienced strong retail value sales growth in 2009, although this growth was slower than in previous years. Organic products are increasingly available from local manufacturers through large grocery retail outlets. Demand for organic milk is increasing, led by sales of organic cheese. Organic packaged food products are now available in frozen or chilled processed food, canned processed food, noodles and ready-meals, to name a few (Euromonitor, 2010c).

Figure 6: Sales of Health and Wellness Food Products by Type 2005-2014 (Estimate)



Source: Euromonitor International, from trade sources/national statistics

Note: 2010 data is provisional, 2011-2014 data is estimated



The Korean functional food regulatory system requires that individual ingredients are reviewed to determine whether a product is a “general food” or “health functional food” regardless of the product’s form (e.g., tablets, capsules, liquid, powder, processed food), and only health functional foods are permitted to use a “specific health” or “structure/function” claim (Kim, Lee & Yoon, 2010).



According to Euromonitor (2009), the South Korean fortified/functional packaged food market continues to grow. Products in this category saw a 2% retail value growth resulting primarily from an increased demand for dairy products which made up about 78% of overall sales. Along with pro/prebiotic yogurt, fortified/functional reduced fat milk and fortified/functional cheese were identified as products with strong growth in 2009, and sales of fortified/functional yogurt products remained high (Figure 6) (Euromonitor, 2010b).



There is a lot of overlap in the market of health and wellness products, as many new products carry attributes from one or more product categories, such as organic products that are also fortified with functional ingredients, fortified/functional products that are promoted on the basis of a health benefit, and organic products made with naturally healthy ingredients. For example, fortified/functional yogurt products are primarily identified as being able to improve digestive health. As a result, increased sales are often at the expense of products in other areas, such as organic or better-for-you products, and vice versa. Nonetheless, consumer interest in new products and brands in these areas is expected to remain high, particularly for products that provide health benefits geared towards the health-conscious consumer (Euromonitor, 2010b).

Source: Mintel

PRIVATE LABEL

Private label food products are growing in popularity. A December 2009(a) Datamonitor report indicates that almost 6 in 10 South Korean consumers gave up some of their favourite brands to save money because of the economic downturn. Nonetheless, slightly more consumers indicated that choosing brands that match their attitudes and outlook on life remained an important consideration. South Korean consumers are also looking for good value-for-money, particularly in recessionary times. This is a difficult concept to define for consumers, as well as for any consumer products industry sector, as it is a very subjective decision, depending on the individual consumer – what they consider to be good quality in relation to a product’s cost and their circumstances at the time. Indeed, today’s consumer is better equipped to research product attributes as well as prices in order to make informed decisions (Datamonitor, June 2009).

It should be noted that while value is increasingly important to South Korean consumers, quality remains an important consideration. Results from a 2008 Datamonitor survey showed that while more than half (53%) of respondents had increasingly purchased food and beverages on the basis of value or cost, only 6% had purchased higher quality products less often, as opposed to 51% who had done so more often. The top factors cited in purchasing decisions aside from price were health attributes, taste or flavour, country of origin and convenience. Private label products of better quality and with a strong image, can appeal to consumers seeking good value-for-money. An April 2009 Datamonitor survey showed that 16% of South Korean consumers viewed private label food products to be of superior quality to famous brands, while 53% considered them to be identical in quality (June 2009).



Source: Planet Retail Ltd.



INTERNET USAGE AND SOCIAL MEDIA

Use of the internet and social media not only as a networking resource but as a shopping resource, is popular and growing in Korea. Online shopping is becoming very popular with South Korean internet users. According to the results of the May 2009 *Survey on the Internet Usage* by the Korea Internet and Security Agency (KISA), internet usage increased by 0.7% over the previous year to reach 77.2%. Of internet users aged 12 and over, 62.3% are internet shopping users who have purchased goods or services over the internet in the last year, an increase of 1.7% over the previous year. While 63.7% of internet shoppers purchased clothing, footwear, sporting goods and accessories, 13.2% purchased food and groceries, including health foods (KISA, November 2009). These results are summarized in Table 3 below.

Internet retailing continues to grow and most grocery retailers and hypermarket companies have internet stores. Euromonitor estimates that food and drink internet retailing increased from 966.2 billion Won (US\$839.6 billion) in 2005 to 2,177.0 billion Won (US\$1,891.7 billion) in 2009, and is projected to increase to 4,114.8 billion Won by 2014 (US\$3,575.5 billion). In 2009, internet retailing as a whole was up 13% in current value growth (Euromonitor, March 2010). A Nielsen study conducted between October and November 2007 found that 99% of South Korean internet users have shopped online; 79% of South Korean internet users made an online purchase in the last month, making them the most frequent online shoppers of the 48 markets surveyed in Europe, North America, Asia Pacific and the Middle East (Nielsen, 2008). In South Korea, free delivery is commonly provided for most purchases from department and grocery stores. The popularity of internet shopping is no doubt linked to timely and free home delivery of internet purchases, from groceries to prepared foods, clothing to household items, which provides convenience and time savings to busy South Korean consumers (Lee, Hyo-sik, October 2010).

In addition to frequent online shopping, one-third of South Korea's entire population is registered on the social networking platform *Cyworld* (McKinsey Quarterly, 2010). According to internet research company, Nielsen KoreanClick, in December 2010, Cyworld was the 4th ranked site by domain (22 million unique visitors); Naver was the most popular (31 million), followed by Daum (29 million) and Nate (24 million). Furthermore, a 2010 Nielsen survey shows that 74% of the world's internet population visits a social networking or blogging site, spending an average of 6 hours per month; by April 2009, 96% of Koreans accessed some form of social networking. Every month, 95% of South Korean internet users visit the country's main social networking site,

Table 3: Internet Use by Population Group, 2008-2009

Population Group by Age	% of Population Group	
	2008	2009
Total	60.6	62.3
Males	54.1	55.6
Females	68.2	70.3
12-19 years	61.0	68.0
20s	87.3	88.65
30s	72.4	73.5
40s	41.7	44.1
50s	27.0	30.1
60 and over	13.9	16.0

Source: KISA, November 2009

O'ngo Food Communications

O'ngo Food Communications works with organizations to promote Korean food, food customs, and culture in Korea and around the world, and also to introduce international foods to Korea (www.ongofood.com). Among some of the tools developed by O'ngo are:

- ▶ an iPod application for a Korean Food Dictionary featuring 130 different Korean foods that you can search for by category, name, taste, or photo, as well as recipes for Korean food favourites and a helpful phrases section;
- ▶ a multilingual Korean Menu Project (a dictionary to define 124 Korean dishes); and
- ▶ an illustrated how-to book on Korean Food whose illustrations and step-by-step directions were developed for use by both the general public and in Korean restaurants.

O'ngo also provides regular updates on food in Seoul and other items of interest at www.seouleats.com/.

Naver, which alone produces over 50% of total consumer-generated media. In Asia Pacific, online product reviews are the third-most trusted source of information, after friends and family. Reliance on online reviews and opinions regarding food ranked fourth, after consumer electronics, cosmetics, and cars (Nielsen; NielsenWire, 2010). As such, social networking and the internet provide additional tools that the food industry can use to better promote new products to prospective Korean consumers. O'ngo Food Communications is one such resource that provides references and practical tools related to Korean food that consumers can access online (see sidebar "O'ngo Food Communications," above).



ENVIRONMENT

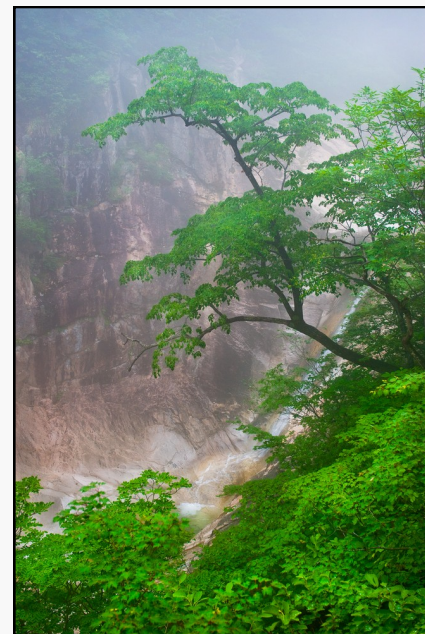
According to Statistics Korea (2009), the South Korean Government is increasing efforts to reduce environmental pollution and reuse waste as an energy resource. In 2006, 57.2% of disposed waste was recycled, an increase from 45.2% in 2003. Consumer recycling accounted for a 40.3% reduction in landfills, up from 25.8% during the same time period.

In 2005, the Korean government passed a law requiring public institutions to purchase environmentally-friendly goods. While the purchase of such goods reached 69.3% in 2007, the Korean government planned to reach 80% by 2010. Furthermore, the government restricts the use of disposable cups, plates, cutlery, synthetic resin containers, bags, shopping bags and packaging materials, in efforts to reduce the wasteful use of resources (Ministry of Environment).

South Koreans rank slightly higher than the global average of those who believe that protecting the environment is important or very important, at 82% versus 80% (Datamonitor, January 2010). According to the 2009 Pew Global Attitudes Project survey, a majority of consumers in 15 of 25 countries surveyed believe that global warming is a very serious problem, including South Korea with 68%. A similar proportion (69%) of South Koreans agreed that people should be willing to pay higher prices in order to address global climate change; 26% disagreed.

The Greendex 2009 tracking survey on environmentally sustainable behaviour also showed that about two-thirds of South Koreans (68%) agree that people need to consume less in order to improve the environment for future generations (National Geographic and Globescan, 2009a). Despite a fall in overall ranking in 2010, South Korea improved its ranking with respect to food consumption moving up to second place, behind India, (National Geographic and Globescan, 2009b; National Geographic and Globescan, 2010).

In 2009, South Koreans tied with Brazilians as the largest consumers of convenience foods, with almost three out of four South Koreans (74%) consuming convenience foods at least once a week (National Geographic and Globescan, 2009a). Although in 2010 less than one-third of South Koreans report that they consume locally grown food at least several times a week, its ranking was bolstered by the decreased consumption of fish and seafood. As in most countries, South Korean consumers report a preference for reusable over disposable products, and half of South Koreans report recycling "all of the time" or "often" (National Geographic and Globescan, 2010).



Source: Shutterstock

Greendex 2010: Consumer Choice and the Environment - A Worldwide Tracking Survey

Since 2008, National Geographic has partnered with Globescan Research in an international research project called Greendex. It consists of an annual study that asks 17,000 consumers in 17 countries (14 in 2008), about behaviours that have an affect on environmental sustainability. This includes food sources, energy use and conservation, as well as transportation choices. Once scored, the responses are tallied by country and compared to its past performance, as well as to the other countries in the study. The lower the score, the better the performance (National Geographic and Globescan, 2010).



▶ CONCLUSION

Today's South Korean consumer is a sophisticated mixture of traditional culture and values with international influences, who is interested in new and different experiences.



Source: Shutterstock

South Koreans enjoy an increased life expectancy, the society overall is aging rapidly and the number of smaller households is increasing. With higher education rates, increases in income and improved living standards, South Korean consumers are also increasingly health-conscious, seeking food products that are healthy or have specific health attributes. South Korea has a long tradition of food use in medicine, and the popularity of these kinds of food products remains strong.

South Korea's consumers are avid users of technology to research and purchase goods and services, including using the internet to make reservations and purchase food and groceries. In 2008, overall spending on food and eating out showed an increase over 2007. Euromonitor internet sales projections for 2010 through 2014 show an upward trend for fruit, vegetables, fish and seafood, and meat.

Having received a controlled risk status from the World Organization for Animal Health in 2007, Canada has been negotiating with South Korea to resume imports of Canadian beef and beef products. While Korean consumers' preference is for domestic beef, imports from Australia and the United States, the dominant players in the import beef market, have soared. That market grew significantly with the 2010-2011 domestic outbreak of foot and mouth disease. Canadian beef will have to rebuild its reputation since it has been out of the market since 2003, and there will be some lingering negative consumer perceptions resulting from the BSE outbreak.

While *kimchi* is still the first- and best-loved food, international influences are gradually winning over Koreans' palates. The South Korean consumer's preference for local or domestic food products is evolving, as tastes are becoming more sophisticated and accepting of international influences. While consumer preference for domestic or locally produced food products remains high as a result of food safety concerns, South Korea imports 60-70% of its food requirements. Opportunities for good quality Canadian food products that are able to win the trust of South Korean consumers may be expected in the future.



Source: Shutterstock



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