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# The Snack Food Market in South Korea

July 1997

*(Également disponible en français sous le titre,  
Le marché des aliments de collation en Corée du Sud)*

Prepared by the

**Team Canada Market Research Centre  
and the  
Canadian Trade Commissioner Service**



Department of Foreign Affairs, International Trade  
Ministère des Affaires étrangères  
et du Commerce international



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**The Government of Canada has prepared this report based on primary and secondary**

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## **THE SNACK FOOD MARKET IN SOUTH KOREA**



### **EXECUTIVE SUMMARY**

This report examines the market for snack food in South Korea, including potato chips, extruded snacks, and processed nuts. It is intended to provide Canadian exporters with market information. The information contained in this report was drawn from secondary sources and from the Canadian Embassy in Seoul.

South Korean sales of snack food reached C\$924 million in 1995, an increase of 25% since 1991. Within this market, potato chips have an approximate market share of 50%, followed by extruded snacks with 30% and nuts at 20%. As with other countries in the region, the snack food market is dominated by local producers, of which the four largest have 85% of the market. Imports of potato chips and nuts have been low, and totalled C\$12 million and C\$21 million respectively in 1995. Euromonitor forecasts indicate that the overall volume of snack food sales will increase 11% by 2000 but value will actually fall slightly due to intense price competition.

Canada does not have a large market presence in the South Korean snack food market. Some opportunities do, however, exist for a dedicated exporter.

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## **MARKET OVERVIEW**

### **Market size and projections**

The South Korea snack food market is the largest in Southeast Asia. Sales in 1995 reached C\$924 million, up 25% since 1991. Potato chips have the largest share of the snack food market and represented C\$462 million in sales or 50% of all snack food sales in 1995. This amounted to an increase of 24.7% over 1991 sales but no change in market share. Extruded snacks did experience a slight increase in market share, moving from 28% in 1991 to 30% in 1995, at the expense of the nut sector.

The overall size and growth of the snack food market is supported by rapidly improving economic conditions in South Korea. In 1995, the average income was C\$13 500 and is expected to climb to C\$20 000 by 2000. As income levels improved through the 1980s and early 1990s, South Koreans had more money to spend on non-necessities such as snack food. Additionally, the overall economy has experienced explosive growth, with GDP growing 96% between 1991 and 1995 to reach C\$480 billion.

### **Table 1 Snack food sales in South Korea, 1991 to 1995 and projections to 2000**

	<u>Chips</u>		<u>Extruded Snacks</u>		<u>Nuts</u>	
	Value (in C\$ millions)	Volume (in tonnes)	Value (in C\$ millions)	Volume (in tonnes)	Value (in C\$ millions)	Volume (in tonnes)
1991	\$370.52	45 300	\$208.52	24 700	\$162.00	20 700
1992	392.98	46 400	224.56	25 300	168.42	21 100
1993	420.25	47 600	240.60	25 900	179.65	21 700
1994	441.10	48 900	256.64	26 600	184.46	22 100
1995	461.95	50 200	272.68	27 300	189.27	22 400
1996	na	51 600	na	28 800	na	22 700
1997	na	53 000	na	28 70	na	23 000
1998	na	54 500	na	29 500	na	23 400
1999	na	56 100	na	30 400	na	23 600
2000	na	57 800	na	31 300	na	23 900

**Growth:**

1991-						
1995	24.7%	10.8%	30.8%	10.5%	16.8%	8.2%
1996-	na	12.0%	na	8.7%	na	5.3%
2000						

Source: Euromonitor, *The Market for Packaged Foods in South East Asia*, 1996

**The competitive environment**

The South Korean snack food market is dominated by four domestic producers — Hatai, Nong Shim, Lotte, and Crown — who together control 85% of the market. Hatai Confectionery is the market leader and produces an assortment of snack foods including potato snacks, shrimp flavoured snacks, corn puffs and wheat puffs. Each of these companies are part of larger conglomerates (known as *chaebols* in South Korea) and, as such, have relatively strong distribution systems in place and strong brand names. This makes it more difficult for foreign brands to capture significant market shares. Recently, however, a number of international brands have appeared in South Korea.

Historically, imported goods have been taboo for Korean Consumers in the belief that the purchase of foreign goods over domestically produced goods had a negative effect on the overall economy. In addition, some imported foods have been falsely accused of being unsafe by Korean consumer groups.

Acceptance of foreign foods is growing, however, as South Korean consumers look for higher quality and greater variety. Nevertheless, importers should be aware of a few criteria South Koreans tend to use when purchasing food items. First, South Koreans are wary of the shelf life date printed on products. If it is close to the date of expiry, consumers are likely to pick another product. Second, they are extremely wary of additives in processed foods and may avoid products with excessive additives. Finally, when imported goods are believed to be of higher quality, South Koreans expect them to command a premium price.

**Table 2. Snack food market shares in South Korea, 1995**

	<b>Sector Share (% value)</b>
Haitai Confectionery	30
Nong Shim Co.	25
Lotte Confectionery	20
Crown Confectionery	10
Bing-Grae Co.	5
Samyang Foods	3
Tong Yang Dairy	2
Others	5

Source: Euromonitor, *The Market for Packaged Foods in South East Asia*, 1996

Snack food imports grew considerably between 1991 and 1995, but still only represent a small portion of overall sales. Imports of nuts in particular experienced explosive growth, growing 306.5% to reach C\$20.7 million in 1995. The United States and China have historically exported the majority of nuts to South Korea, but Vietnam has recently surpassed both of these countries. Potato chip imports have also experienced some growth, increasing from C\$7.1 million in 1991 to C\$11.9 million in 1995. The United States, Spain, and the Netherlands are the major sources of imported chips. No data was available on extruded snack imports.

**Table 3. Top five exporters of potato chips to South Korea, 1995 (in C\$000s)**

<b>Supplier</b>	<b>1991</b>	<b>1992</b>	<b>1993</b>	<b>1994</b>	<b>1995</b>
World	7 109	11 562	11 087	8 228	11 897
United States	3 779	5 617	5 831	5 743	7 796
Spain	1 635	3 902	2 146	1 294	1 724
Netherlands	69	154	326	378	1 147
Italy	-	998	2 751	586	924
Japan	-	-	23	94	239
Canada	-	-	-	25	-

Source: International Trade Data Bank, TIERS

**Table 4. Top five exporters of nuts to South Korea, 1995 (in C\$000s)**

<b>Supplier</b>	<b>1991</b>	<b>1992</b>	<b>1993</b>	<b>1994</b>	<b>1995</b>
World	\$5 090	5 126	6 474	8 983	20 692
Vietnam	-	-	-	505	9 138
United States	3 835	4 070	5 099	6 076	6 340
China	378	784	123	2 173	2 811
Japan	169	59	43	3	774
Philippines	-	-	-	125	601
Canada	-	-	-	-	74

Source: International Trade Data Bank, TIERS

### **The Canadian position**

Canadian exports of snack food to South Korea were very low between 1991 and 1995, totalling

C\$99 000.

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## **DISTRIBUTION CHANNELS**

### **Overview of distribution system**

The South Korean distribution system has been described as fragmented and inefficient. Very few companies have a national distribution system in place and therefore importers generally have to deal with a large number of wholesale distributors. Such inefficiencies add to the costs incurred by the consumer. Canadian exporters might consider it best to concentrate on certain regions rather than try to obtain nationwide coverage. As imported foods are generally most popular in urban centres where, 70% of the population resides, they are likely the best targets for Canadian exporters.

### **Importers and intermediaries**

To gain long term success in this marketplace, it is strongly recommended to obtain South Korean representation. When making initial contact with potential buyers in South Korea, the Canadian exporter should ensure that they provide as much information about their products as possible. This should be followed up with a personal visit so as to provide the potential agent with further information such as price and shipping time, and to gain additional market information. Locating an agent should be undertaken with extreme caution and no supplier should select an agent without this personal contact. When formulating a contract, the Canadian exporter should ensure that there is a favourable escape clause for them should the agent prove to be unreliable.

Most Canadian companies enter into an arms-length relationship with agents in South Korea. A good local representative will provide a working relationship with government agencies and with local South Korean firms who have well-developed distribution networks.

Importers and distributors both generally get margins of 10 to 20 percent for imported foods. As many domestic producers ship directly to retailers, they avoid these mark-ups, making their products substantially cheaper than imported goods.

### **Retail distributors**

In South Korea, there are over 2200 supermarkets which represent the majority of food product sales. Competition from more than 1800 chain convenience stores and 30 discount warehouse stores is increasing steadily. To combat this increasing competition, a number of supermarket chains have invested in discount supermarkets. Most retail distributors get margins of 20 to 30 percent above the prices they pay for goods from distributors.

Despite the large number of retail outlets in South Korea, only a few companies have national distribution systems in place. These are large, diversified Korean companies called *chaebols*. They are, however, generally reluctant to import foods for fear of negative repercussions from anti-import groups. At the same time, small- to medium-sized Korean companies are eager to import food items but often lack the marketing expertise or distribution network to promote new merchandise. As most local food producers distribute their products directly to retailers, wholesalers have played a relatively small role in Korea and are underdeveloped when compared to some other countries in the region. This is gradually changing as the retail and wholesale

market opens to foreign investors and local companies develop their distribution systems to prepare for new market entrants.

### **Foodservice operators**

The Korea Tourist Hotel Supply Centre (KTHSC) orders products on behalf of the major tourist hotels in Korea. This private organization usually receives orders from tourist hotels and then solicits offers from suppliers and selects the lowest tender. Hotels can also specify a particular source for their products and KTHSC will source from that supplier. This organization is listed in Appendix D. Alternatively, Canadian exporters can deal with foodservice outlets directly.

### **Promotional considerations**

Foreign snack food suppliers can increase their product recognition and brand awareness through effective advertising, attractive packaging, quality, and the actions of local agents. The advertising of snack food is permitted, although the use of television (with the exception of cable television) for advertising is prohibited under current law. A new system will soon be introduced where all ad buyers will be sold air time in order of application, making it easier for foreign firms in the marketplace to place ads.

Print media is an important forum for advertising. South Korea has 23 major daily newspapers; thirteen of these are located in Seoul (they are all distributed throughout the nation) including two English language papers, *The Korea Herald* and *The Korea Times*. South Korea also has a wide range of weekly and monthly magazines with circulation ranging from an estimated 10 000 to 240 000. Many of these magazines are aimed at women.

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## **CONSIDERATIONS FOR MARKET ENTRY**

### **Local standards and regulations**

#### **Health and food safety**

Aside from regular quarantine and customs clearance procedures, there are no specific health requirements for snack food if packaging and labelling requirements meet Korean standards.

At present, the South Korean government prescribes a pre-determined shelf-life for confectionery products. The short shelf lives assigned, accompanied with sometimes lengthy quarantine periods, often result in inadequate time for distribution and sale. The government has, however, removed shelf-life regulations on various food items.

#### **Packaging and labelling**

Korean and the language of the product's country of origin must be used in labelling. Stickers may be used in place of labels, but they should not be easily removable. The label should include the following:

- name of product;
- type of product;
- name of the importer, address and telephone number;

- importer's business registration number;
- dates of manufacturing or date of import (not mandatory);
- shelf life;
- country of origin;
- net weight or measurement;
- names of ingredients with percentages in descending order; and
- storage instructions.

Labelling should be completed before quarantine inspection at the port of arrival, although labelling may be applied in a bonded warehouse.

The Government is in the process of making bar codes a requirement for all products and already 80% of packaged food items have bar codes. However, less than 10% of retail outlets have installed scanner systems.

## **Documentation and procedures**

### **Required documentation**

Every company wishing to trade with Korea must obtain an Import-Export Company Licence from the Ministry of Trade and Industry. Without such a licence, firms are not allowed to import into Korea. Licensed traders must prepare documentation for each import transaction. The minimum documentation requirements include the following: import permit, offer sheet, description of the product, purchase order and other documents as required by the terms of the letter of credit. Exporters should contact their local agent in order to get precise documentation requirements. Finally, special attention needs to be taken to ensure that all documentation related to imported products is complete and accurate. As these documents are subject to intense scrutiny, the smallest discrepancy may be grounds to refuse entry.

#### a) Import licence

All imports require licences. Import licences are granted only to registered traders.

Import licences are issued by the foreign exchange bank which issues the letter of credit or by the Ministry of Trade, Industry and Energy. Each item requires a licence, although one import licence can cover several shipments and one shipment can be under several permits. If the item is not listed on the import licence it may not be imported.

A pro-forma invoice is required in order to obtain an import license and opening a letter of credit. It must contain the following:

- a full description of goods in question;
- f.o.b. value of goods;
- insurance and freight, individually and totalled;
- issued in duplicate and authorized by a chamber of commerce (they require an additional notarized file copy); and
- two copies are presented to the South Korean Consulate for legalization.

#### b) Food registration

All food imports must be approved through a process of self specification, according to the Food Sanitary Law of South Korea. The first step in this procedure is have the product tested by the Korea Advanced Food Research Institute (KAFRI). KAFRI requires the following for each test



conducted:

- Application form- 1 copy;
- Sample of product- 4 of each;
- Ingredient information- 1 copy;
- Result of testing already conducted- 1 copy; and
- Manufacturing process- 1 copy.

If the products pass this process, KAFRI issues a Testing Certificate. There is no cost involved in the testing procedure undertaken at the national testing institute, other than a revenue stamp or copying cost.

After the Testing Certificate is acquired, the importer must apply for a Self Specification Approval Certificate from the National Institute of Health (NIH) which requires:

- Application form- 3 copies;
- Testing Certificate- 3 copies;
- Ingredient information- 1 copy;
- Result of testing already conducted- 1 copy; and
- Manufacturing process- 1 copy.

This testing can take anywhere from one to three months to complete.

#### c) Shipping documents

The following shipping documents must be presented to customs officials by the agent/importer upon the entry of exported goods into South Korea:

- Packing list - one copy enclosed in the pertinent package and one sent with other documents. Must contain a full and concise description of items in the shipment;
- Documents from the seller that correspond exactly with the import permit (changing the model, type, specification or generation of a product after obtaining an import permit could make the permit invalid);
- Commercial invoice - must be signed and issued by the seller. A minimum of three copies must be certified by a chamber of commerce (one copy for its files). Two copies of the invoice and certificates of origin are then legalized for \$2 per document (the Consulate keeps one and returns the original); and
- Certificates of origin - certified by a chamber of commerce and presented to the South Korean Consulate. Method of payment must be shown on the certificate. If this is not by a letter of credit then this must be stated. If a letter of credit is used, then the credit number must appear and a copy of credit must be attached. The certificate of origin must also include the following:
  - description of goods;
  - quantities;
  - value;
  - name and address of importer;
  - name and address of exporter;
  - marks and number; and
  - name of carrier etc.

### **Customs duties, tariffs and taxes**

Importers must pay for 100% of the cost of imports including freight, insurance and customs duties before the products are released from customs. Most snack foods incur a tariff rate of 8%. All food products are also subject to 10% value added tax.

The Ministry of Finance will soon submit a bill to parliament to simplify customs clearance. Customs clearance can be a lengthy process in South Korea, especially for first time imports, which can take up to three months to clear through customs. Most products enter without problems or delays, but clearance of a first shipment does not necessarily mean that further shipments will clear without impediment. A typical clearance time is 15 days. The Government is now implementing a system to reduce this to two to three days. This new system will enable traders to import and export simply by filing a report with the customs authorities rather than acquiring formal permits.

### **Transportation and storage**

South Korea has 62 936 kilometres of roads, of which 13 476 are national highways. It also has 3106 kilometres of railway, and 1609 km of inland waterways. Pusan, Inchon, Mokpo and Ulsan are the major shipping ports. Currently, there are over 100 licensed commercial bonded warehouses in South Korea; the maximum storage period allowed is 24 months.

South Korea is a member of the TIR Customs Convention. This means that freight shipments from other member nations are permitted to cross international borders without discharging cargo from road vehicles or containers at border points for customs inspection.

Shipping cases should bear the mark of the consignee, including port mark, and should be numbered unless the contents of the packages being shipped are easily identifiable without numbers. Special marking requirements are as follows:

- consignee;
- contract number;
- end-user;
- port of discharge;
- item number and, if applicable, package numbers in sequence;
- commodity description;
- net and gross weight, cubic measurements; and
- shippers marks and/or trade marks, caution marks (if applicable) and any other marks required under contract.

### **Export financing and payment**

The Korean government encourages an irrevocable and confirmed sight letter of credit, opened before shipment, as a method of payment for imports by Korean importers. Banks require most importers to pay 100% of the value of a letter of credit prior to issuance of the letter of credit.

### **Cultural and business practices**

Canadian Exporters should be aware of the cultural nuances of doing business in South Korea. Face to face contact with a consistent representative is essential for Koreans. Also, the exchange of business cards plays an essential role in initial meetings and it is recommended that one side be printed in Korean. The Canadian Embassy can arrange to have business cards translated and back-

printed in Korean at cost with a minimum three day turn-around time. It is important to create an official title even if one does not have one, as a lack of title is considered a puzzling omission by most Koreans.

Expect communication to fail frequently as Korean businesses are not accustomed to keeping associates informed. Fax customers daily until a reply is received. If there is still a lack of response contact the Canadian Embassy and request that it phone your Korean contact on your behalf. It is also advisable to rely on written communication, such as the fax machine followed by a letter, rather than the telephone.

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Department of Foreign Affairs and International Trade, *Legal Guide to Business in Korea*, June 1993 (InfoCentre code 410CA English, 410CF français).

Euromonitor International, *The Market for Packaged Foods in South East Asia*, Great Britain, 1996.

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## APPENDIX A — STATISTICAL TABLES

### Potato chip exports to South Korea, 1991-1995 (in C\$000s) (SITC 5676)

Supplier	1991	1992	1993	1994	1995
World	7 109	11 562	11 087	8 228	11 897
United States	3 779	5 617	5 831	5 743	7 796
Spain	1 635	3 902	2 146	1 294	1 724
Netherlands	69	154	326	378	1 147
Italy	-	998	2 751	585	924
Japan	-	-	23	94	239
Singapore	-	-	-	-	22
Switzerland	-	-	1	10	10
Australia	-	-	-	-	6
United Kingdom	1 133	780	-	-	-

China	453	110	-	-	-
Canada	-	-	-	25	-
Other	40	1	7	160	186

Source: International Trade Data Bank, TIERS

### Exports of nuts to South Korea, 1991-1995 (in C\$000s) (SITC 5892)

Supplier	1991	1992	1993	1994	1995
World	5 090	5 126	6 473	8 982	20 692
Vietnam	-	-	-	504	9 138
United States	3 834	4 070	5 098	6 076	6 340
China	378	783	1 232	2 172	2 810
Japan	169	59	42	2	774
Philippines	-	-	-	125	600
Indonesia	-	-	-	6	431
France	-	-	20	19	166
India	1	2	1	-	140
Germany	4	11	11	12	114
Canada	-	-	-	-	74
Netherlands	-	-	-	-	50
Thailand	-	1	30	4	24
South Africa	1	72	33	33	16
Australia	547	111	1	1	4
Other	154	13	2	24	5

Source: International Trade Data Bank, TIERS

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## APPENDIX B — TRADE SHOWS AND PROMOTIONAL VENUES

Event/Venue	Description	Organizer
Seoul Food Seoul International Food Technology Exhibition	Korea Exhibition Centre in Seoul, Korea May 7-10, 1997	Korea Trade Promotion Corporation 159 Samsdung-dong Kangnam-gu Seoul 135-729 Korea Tel:(82-2) 551-4414 Fax: (82-2) 557-5784 Contact: Jong-Soo Lee

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## APPENDIX C — SNACK FOOD IMPORTERS IN SOUTH KOREA

Amfarco Limited  
Contact: Chung Young  
C.P.O. Box 4628

Seoul, South Korea  
Telephone: (82-2) 752-2231  
Facsimile: (82-2) 757-2231

Doosan Industrial Company  
Contact: Kim Joon-Kyung  
Kwanghwamun, P.O. Box 280  
Seoul 110, Korea

Telephone: (82-2) 759-6114  
Facsimile: (82-2) 754-6160

East West Korea Corporation  
Contact: Hong Sa Kwang  
401 Boeun Building 354-20, Seokyo-D  
Mapo-Ku 121-210, Seoul, Korea  
Telephone: (82-2) 338-9280  
Facsimile: (82-2) 333-9635

Na-Re Industrial Company Limited  
Contact: S.L. Lim  
Su Un Building, 88 Kyung Un-Dong  
Jong Ro-Ku, 110-31, Seoul, Korea  
Telephone: (82-2) 722-0500  
Facsimile: (82-2) 734-0707

Samah International Corporation  
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Seoul, 100-636, Korea  
Telephone: (82-2) 571-3097  
Facsimile: (82-2) 579-2574

Tae Jin Corporation  
C.P.O. Box 10115  
Seoul, Korea  
Telephone: (82-2) 778-7818  
Facsimile: (82-2)

Young Jin Company Limited  
3FL, 170-11, Garak-Dong  
Songpa-Ku, Seoul, 138-160, Korea  
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18FL, 125 Byucksan BD, 12-5 DO  
Yongsan-Ku, Seoul, 140-170, Korea  
Telephone: (82-2) 727-6091  
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East Gate Corporation  
Contact: Bang Young-Soo  
K.P.O. Box 1365  
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Telephone: (82-2) 784-1801  
Facsimile: (82-2) 784-6558

Jewon International Corporation  
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Sungbo Trading Company  
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## **APPENDIX D — KEY GOVERNMENT CONTACTS AND SUPPORT SERVICES**

### **Canadian government contacts**

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Seoul 100-170, Republic of Korea  
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Facsimile: (011)(82-2) 755-0686

Agriculture and Agri-Food Canada  
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151 O'Connor St  
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Korea Trade Promotion Corporation  
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Toronto, Ontario, M5H 2M5  
Telephone: (416) 368-3399  
Facsimile: (416) 368-2893

Association of Foreign Trading Agents of Korea  
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1, Choongang-Dong, Kwachon, Kyonggi-Do  
Republic of Korea  
Telephone: (82-2) 503-7200  
Facsimile: (82-2) 504-6658

Bureau of Customs and Tariff  
Ministry of Finance  
1, Joongang-Dong, Gwachun  
Republic of Korea  
Telephone: (82-2) 503-92-96  
Facsimile: (82-2) 503-93-24

Ministry of Trade  
1, Choongang-Dong  
Kwachon, Kyonggi-Do  
Republic of Korea  
Telephone: (82-2) 503-7171  
Facsimile: (82-2) 504-9496

### Chambers of commerce and industry associations

Seoul Chamber of Commerce  
45, Namdaemunno 4-ga  
Chung-gu, Seoul, Republic of Korea  
Telephone: (82-2) 757-0757  
Facsimile: (82-2) 776-8213

The Industrial Bank of Korea  
50 Ulchiro 2-ka, Chung-ku, Seoul  
Republic of Korea  
Telephone: (82-2) 729-4475  
Facsimile: (82-2) 729-7002

The Korea Development Bank  
10-2 Kwanchul-Dong  
Chongro-ku, Seoul, Republic of Korea  
Telephone: (82-2) 398-6335  
Facsimile: (82-2) 723-4475

Association of Foreign Trading Agents of Korea  
218, Hangeangro 2-Ka  
Yongsan-Ku, Seoul, Korea  
Telephone: (82-2) 792-1581  
Facsimile: (82-2) 780-4337

Consultation Office for Overseas Companies  
 KOEX Building, 159 Samsong-dong  
 Kangnam-Ku, Seoul 135-1311, Korea  
 Telephone: (82-2) 551-1115, 551-1127  
 Facsimile: (82-2) 555-7414, 551-1311

Korea Cold Storage Ltd.  
 13-8 Noryangjin-Dong  
 Dongjak-Ku, Seoul, Korea  
 Telephone: (82-2) 815-9331  
 Facsimile: (82-2) 812-8808

Korea Tourist Hotel Supply Centre  
 Contact: Mr. Yoo Hyo-Hee, President  
 255-5, Nung-Dong  
 Sugdong-k, Seoul, Korea  
 Telephone: (82-2) 458-3291  
 Facsimile: (82-2) 454-2547

Finance and Economic Board  
 1 Jungang-Dong, Kwachon  
 Kyunggi-do, Korea  
 Telephone: (82-2) 500-5424  
 Facsimile: (82-2) 503-9273

Korea Restaurants Supply Centre  
 168-26 Samsung-Dong  
 Kangnam-Ku, Seoul, Korea  
 Telephone: (82-2) 554-9092  
 Facsimile: (82-2) 554-9093

### Canadian banks in South Korea

The Bank of Nova Scotia  
 C.P.O. Box 7783 / 9th Floor,  
 The Korea Chamber of Commerce  
 and Industry Building  
 #45, 4-ka, Namdaemoon-ro, Chung-ka  
 Seoul, Korea  
 Telephone: (82-2) 757-7171  
 Facsimile: (82-2) 752-7189

National Bank of Canada  
 K.P.O. Box 584  
 6th Floor, Leeman Building  
 146-1 Soosong-dong, Chongro-gu  
 Seoul, Korea  
 Telephone: (82-2) 733-5012  
 Facsimile: (82-2) 736-1508

The Royal Bank of Canada  
 C.P.O. Box 5374  
 #1, 1-ka, Chung-Ro, Chung-gu  
 Seoul, Korea 110-121  
 Telephone: (82-2) 730-7791  
 Facsimile: (82-2) 736-2995

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### READER EVALUATION

Please help the Team Canada Market Research Centre to produce market reports which meet your information needs by completing this evaluation form and returning it by facsimile at (613) 943-8820. Thank you for your valuable input.

1. How did you obtain a copy of this market report?

- InfoCentre FaxLink system  Government worldwide web site  
 InfoCentre help line  InfoCentre bulletin board system  
 Local government office  Other: \_\_\_\_\_

2. How would you describe this market report?

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
Useful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Complete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well organized	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Well written	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ideal length	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. In what form do you prefer to obtain these reports?

- Print       Electronic

4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.

- Seek an agent/distributor                       Contact Canadian trade office abroad  
 Visit the market                                       Participate in a trade show abroad  
 Do more research                                       Nothing  
 Other: \_\_\_\_\_

5. What other market reports would be of benefit to your organization? Please identify specific products and countries.

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6. Which of the following categories best describes your organization? Check one only.

- Processor/manufacture     Government  
 Trading house               Student/academia  
 Export service provider    Consultant  
 Industry/trade association  Other: \_\_\_\_\_

7. What were your organization's total sales last year, in Canadian dollars?

- Less than 10 million     10 million to 50 million  
 More than 50 million    Not applicable

Additional comments/suggestions for improvement: \_\_\_\_\_

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**OPTIONAL** — The name of your organization is: \_\_\_\_\_

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