



Staple Foods in South Korea

November 2025

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EXECUTIVE SUMMARY

Volume sales stagnate but opportunities exist in adding value to the market

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Volume sales stagnate while value growth is propelled by the search for healthier options

Health and sustainability on the menu as primary considerations

Rising production costs hit sweet treats

WHAT'S NEXT?

Growth expected to remain focused more on value than volume gains

Competition set to evolve through new product development and distribution strategies

Changing lifestyle behaviours expected to influence the future of staple foods

COMPETITIVE LANDSCAPE

CJ Cheiljedang strengthens its leading position with its trusted product range

Nongshim and Ottogi provide stiff competition with tried and trusted products

CHANNELS

Hypermarkets lead sales but convenience stores have become testing grounds

E-commerce continues to grow and develop

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[Baked Goods in South Korea](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Baked goods evolving to meet new consumption occasions

INDUSTRY PERFORMANCE

Bread transforming from an indulgent snack to a meal replacement option

Dessert bread retains its popularity but players rebrand to meet evolving trends

WHAT'S NEXT?

Producers of baked goods may need to feed off pop culture to stand out
Clean label products and digestibility set to outpace traditional health claims
Bakery-to-go expansion of bread into foodservice and hybrid meal formats

COMPETITIVE LANDSCAPE

SPC maintains its leadership despite public backlash from safety incident
Private label on the rise with strong value proposition

CHANNELS

Artisanal bakeries and hypermarkets dominate but convenience stores are making inroads
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[Breakfast Cereals in South Korea](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Breakfast cereals seeing polarisation of demand

INDUSTRY PERFORMANCE

Health-conscious consumers are reshaping the breakfast cereals market
Children's breakfast cereals suffers from a shrinking target audience and an unhealthy image

WHAT'S NEXT?

Breakfast cereals under threat from evolving breakfast routines
Sugar reduction and functional benefits will be key to revitalising demand
Breakfast cereals offer potential as a topping ingredient in the foodservice channel

COMPETITIVE LANDSCAPE

Traditional Cereal Brands Struggle to Compete Amid Functional Food and Snack Alternatives
Players use new IPs to expand their reach to a wider audience

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KEY DATA FINDINGS

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Processed fruit and vegetables suffer from negative image perceptions

INDUSTRY PERFORMANCE

Health-focused consumers turn away from processed fruit and vegetables

Frozen fruit thriving as a more affordable alternative option to fresh fruit

WHAT'S NEXT?

Single portion ready-to-eat frozen fruit offers potential growth opportunity

Offering healthier options could be key to driving market development

Players under pressure to adapt to the changing needs of the market

COMPETITIVE LANDSCAPE

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales of processed meat, seafood and alternatives under pressure

INDUSTRY PERFORMANCE

Shelf stable products under pressure due to mounting health concerns

Processed meat and seafood find new opportunities as protein-rich snacks

WHAT'S NEXT?

Lifestyle shifts will accelerate demand for on-the-go protein formats

Health-conscious consumers will push the category toward clean label and plant-based innovation

Players likely to focus on format innovation and distribution strategies to gain share

COMPETITIVE LANDSCAPE

Innovation remains a feature of the market

Private label making gains thanks to a more affordable positioning

CHANNELS

E-commerce now the second largest distribution channel in the market

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[Rice, Pasta and Noodles in South Korea](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sales stagnate as consumers turn to alternative meal options

INDUSTRY PERFORMANCE

Sales stagnate as consumer tastes and preferences evolve

Players focus on adding value

WHAT'S NEXT?

Ready-to-eat rice to shift toward health, functionality, and personalisation

Noodles expected to serve as a testing ground

Premium and imported pasta set for growth

COMPETITIVE LANDSCAPE

Nongshim retains a strong lead with ongoing investment new products and marketing
Leading players in rice and pasta facing increasing competition

CHANNELS

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