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DIETARY SUPPLEMENT MARKET IN SOUTH KOREA

A.O. DOMASHOVETS[1], *O.V. SHVED*[1], *T. KUPKA*[2]
[1]Lviv Polytechnic National University, Department of Technology of Biologically Active Compounds, Pharmacy and Biotechnology, Ukraine
[2]University of Opole, Institute of Chemistry, Poland

E-mail: olha.v.shved@lpnu.ua

To conduct a systematic analysis of the structural and functional characteristics and strategic development priorities of the South Korean dietary supplement industry (nutraceuticals, parapharmaceuticals, and cosmeceuticals), identifying the impact of leading corporations, regulatory mechanisms, and technological innovations on the global competitiveness of the national bioindustry.

Materials and Methods. The study applied methodological analysis and literature-based data processing to assess the development of dietary supplement technologies within South Korea's bioindustry. The evaluation framework accounted for factors such as globalization, digitalization, and regulatory alignment with international standards, with particular focus on the role of both domestic and transnational manufacturers. The findings emphasize the dynamic nature of biotechnological applications in the nutraceutical sector, offering insights relevant for potential adaptation in other markets, including Ukraine.

Results. The study examines the current state of the Korean health product market, categorized into nutraceutical, parapharmaceutical, and cosmeceutical segments. It highlights the industry's growth dynamics and its integration into the broader healthcare ecosystem. The market portfolios and strategic maneuvers of leading corporations are analyzed, showcasing the synergy between advanced biotechnology and traditional phytotherapy for anti-aging and health promotion. The findings suggest that stringent government regulation and national innovation strategies are pivotal factors driving the successful global expansion of Korean manufacturers.

Conclusion. The comprehensive analysis confirms that the synergy of biotechnological innovation, clear regulatory frameworks, and a robust corporate sector forms a unique model for the development of South Korea's dietary supplement market, positioned for global leadership.

Key words: South Korea, corporate portfolio, government regulation, innovation strategies, phytotherapy, dietary supplements, nutraceuticals, parapharmaceuticals, cosmeceuticals.

This article provides a comprehensive overview of the dietary supplement market in South Korea, analyzing its current structure, key players, and development trends. The study examines regulatory frameworks, consumer behavior, product segmentation, and the role of biotechnology and digital health solutions in shaping the nutraceutical sector. Particular attention is given to the influence of government policies, globalization, and export strategies that have positioned South Korea as one of the most dynamic markets in the Asia-Pacific region. The article identifies major growth drivers, including increased health awareness, aging population, and the rise of personalized nutrition, while also addressing challenges such as regulatory complexity and market saturation. The analysis highlights strategic opportunities for further expansion through innovation, international collaboration, and standard harmonization. Insights from South Korea's experience may serve as a valuable reference for countries such as Ukraine and Poland seeking to strengthen their functional food and dietary supplement industries. The article is recommended for researchers, healthcare professionals, industry experts, investors, and policymakers interested in understanding the evolving landscape of the global nutraceutical market.

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In the modern world, there is a steady increase in interest in a healthy lifestyle, which is accompanied by an increased demand for dietary supplements. These products are an important component of the daily diet of millions of people, as they contribute to health promotion, prevention of chronic diseases and improvement of the quality of life. The global market for dietary supplements demonstrates stable growth, which is due to both socio-demographic factors (aging population, urbanization) and new consumer trends (increasing popularity of personalized nutrition, preventive medicine and eco-products). Against the background of the global development of the dietary supplement industry, South Korea (hereinafter referred to as Korea) attracts special attention as a country that has been a significant player in the bioindustry, pharmaceuticals and the production of functional foods in recent decades. The Korean market is one of the most dynamic in the world: it combines traditional knowledge of oriental medicine with modern scientific approaches, creating innovative products with high bioavailability, proven effectiveness and competitiveness in the international arena.

The experience of Korea reflects the leading global trends in the development of the industry, in particular the integration of traditional medicine and modern biotechnology, the active implementation of innovative approaches to production and quality control, as well as the focus on international competitiveness. Studying the Korean model of development of the dietary supplement market allows not only to understand the specifics of its functioning more deeply, but also to outline the possibilities of applying best practices in the global and national context.

Materials and Methods

In this study, a combination of methodological analysis and abstract-logical reasoning was applied to systematize the key criteria for evaluating the development and integration of dietary supplement technologies within South Korea's bioindustry. Particular attention was given to the role of major transnational corporations and domestic manufacturers involved in the production of nutraceuticals and functional health products, as well as companies providing services related to bioprocess implementation. Considering that globalization, digitalization, and international collaboration are among the leading trends shaping the modern bioeconomy, these factors were incorporated into the analytical framework.

To collect and process the data, scientific literature search methods, statistical analysis, comparison, systematization, and generalization techniques were used. The study also involved a review of existing technological developments in the fields of classical biotechnology, fermentation-based production, and cellular engineering, which underpin the formulation of dietary supplements in accordance with global quality and safety standards. Special emphasis was placed on South Korea's regulatory alignment with international guidelines and patent policies, including the practices of the Eurasian Patent Organization, as well as on the creation of scalable production models. The findings highlight that the structure and application of biotechnologies in the dietary supplement sector are highly dynamic and vary depending on market demands, technological feasibility, and the specific requirements of national industries.

Results and Discussion

The South Korean dietary supplement industry is a dynamic sector, and has evolved from a traditional herbal-based market into a high-tech bio-ecosystem.

This transition is driven by a combination of personalized nutrition, greater recognition of dietary supplements as an important component of a healthy lifestyle, strict regulatory standards, and an aging population, creating a unique "K-Health" model [1–6].

In 2012, the Ministry of Food and Drug Safety of South Korea reported that there were 12,495 different types of dietary supplements on the market, and in 2019, this number had increased to 26,342. At the same time, in 2021, Korean households spent an average of USD 259.5 billion on dietary supplements, which means that 84.5% of Koreans use them [1]. In 2024, the Korean dietary supplement market brought in revenue USD 4.11 billion [2, 7–9]. The historical dynamics and forecast of the market size, as well as its segmentation by product types, are shown in Fig. 1.

According to forecasts, this market will expand at an average annual growth rate of 9.5% until 2030. By 2030, accordingly, the Korean dietary supplement market will increase almost 2 times. This market also stands out on a global scale: in terms of revenue

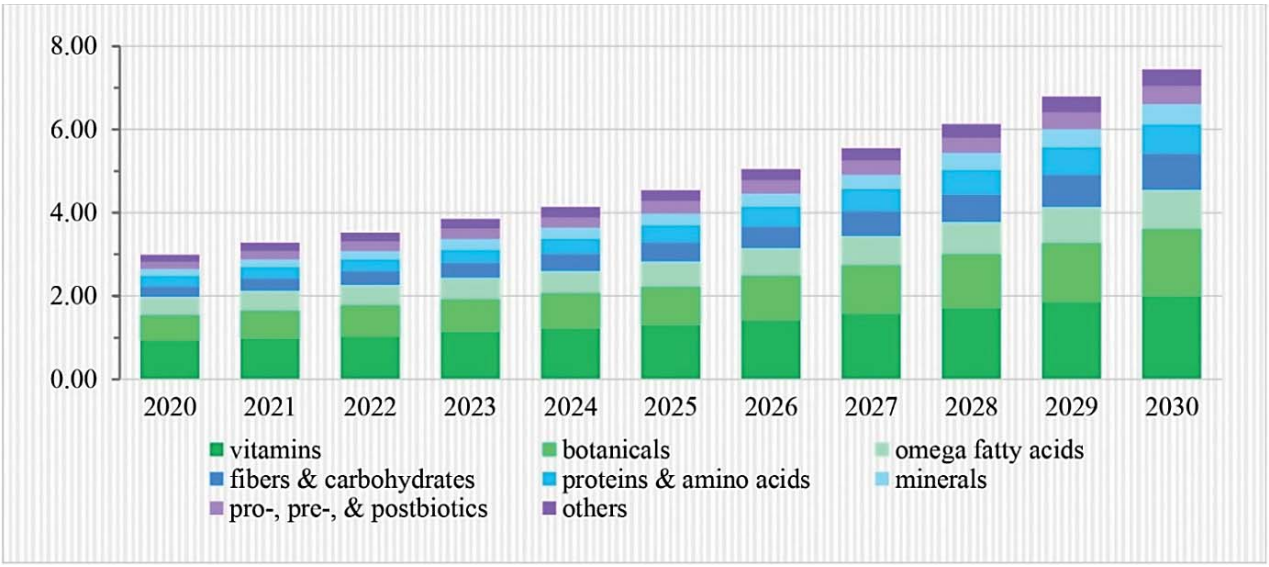

Fig. 1. **Structural dynamics and long-term forecast (up to 2030) of the South Korean dietary supplement market.**
The data illustrate a steady shift toward personalized nutrition segments.
Source: Developed by the authors based on Ministry of Food and Drug Safety reports [7].

in 2024, Korea's share, according to various sources, was from 2.7% to 3.4% of the global dietary supplement market [2–5, 7, 9–10].

Positive forecasts for the growth of the dietary supplement market are associated with a number of factors, the main of which is the transition to a proactive approach to health (preventing diseases so as not to treat them later). This broader shift in attitudes is reinforced by several additional drivers that directly shape consumer behavior and market dynamics.

First, the media and expert circles actively promote the benefits of supplements. In particular, media personalities (actors, idols and other celebrities) play an important role in popularizing dietary supplements, often becoming the faces of advertising campaigns. Their positive experience and approval create a trust effect among fans, which significantly influences consumer decisions.

Secondly, due to high levels of stress, irregular eating and lack of exercise, people resort to using supplements to support energy, immunity and reduce stress.

Third, digital resources — medical applications, forums and consultations — facilitate access to information, and reviews influence product choices.

Not inconsiderable factor is the aging of the population caused by a critical demographic crisis. Due to the low birth rate, Korea's population could shrink by 27% by 2070, from the current 52 million to 38 million, and the share of the country's residents aged 65 and over will jump to 46% from about 18% this year. The aging population is fueling the growth trend of the dietary supplement market in Korea: demand for calcium, vitamin D, glucosamine, omega-3, and antioxidants is growing to prevent age-related problems. There is also a shortage of doctors (2.6 doctors per 1,000 people), which is pushing the population to prevent diseases with supplements. Personalized supplement regimens that take into account genetic and individual characteristics are also growing in popularity, facilitated by DNA testing and health monitoring technologies [2–6, 7–21].

The South Korean dietary supplement market is highly competitive, with local and international brands competing for market share. It is heavily dominated by established players with brand recognition and extensive distribution networks, making it difficult for new entrants to enter the market. Fierce competition can lead to price wars and lower profit margins, which will support investment and innovation. Building on our previous analysis of the Korean bioindustry structure [6], this study focuses on the functional food segment, specifically the nutraceutical, parapharmaceutical, and cosmeceutical subsegments.

Given the large number of products available, consumers have a wide range of

choices, which leads to brand loyalty issues for companies. Companies must constantly innovate to stand out from the competition. However, developing new and unique products requires significant investment in research and development. The pressure to innovate can be resource-intensive and may not always lead to successful products, adding to the financial risks for companies.

Among the well-known Korean manufacturers of dietary supplements are CJ WellCare Co Ltd, Korea Ginseng Co, Nutrione Co Ltd, Il-Yang Pharm Co Ltd, Cellromax Co Ltd, Kolmar Korea Co Ltd, Novarex Co Ltd, Amorepacific Co, Pulmuone Health & Living Co Ltd. Foreign brands face difficulties in obtaining official certification, and Korean consumers place strong emphasis on purchasing domestically produced goods, which further hinders foreign manufacturers. Some of the foreign companies present in the market include Amway Ltd, GNC Co Ltd, DSM Nutritional Products AG, Biovea Co Ltd, Nestlé Ltd, and GlaxoSmithKline Co Ltd [1, 11–19].

After identifying the major Korean companies operating in the dietary supplement sector, it is important to examine their respective market shares. Analyzing the distribution of market shares provides insight into the competitive landscape, highlights the leading players, and reflects broader consumer preferences within the Korean dietary supplement market (Fig. 3). Two major strategic groups define the competitive landscape: 1) Large conglomerates (Chaebols) like CJ WellCare and LG (Nutrione), which leverage vast R&D resources for fermentation and synthetic biology; and 2) Specialized traditional leaders like Korea Ginseng Co, focusing on the standardization of phytonutrients.

The competitive landscape of South Korea's dietary supplement market is characterized by a high degree of integration between large-scale industrial biotechnology and specialized R&D. Leading corporations can be categorized into three strategic groups based on their technological focus:

Multi-industry Conglomerates (CJ WellCare, Nutrione, LG H&H): These players

Fig. 2. **Strategic positioning of key industrial players in the Korean bioindustry**
The selection highlights the dominance of large-scale conglomerates (Chaebols) and specialized R&D-driven manufacturers.

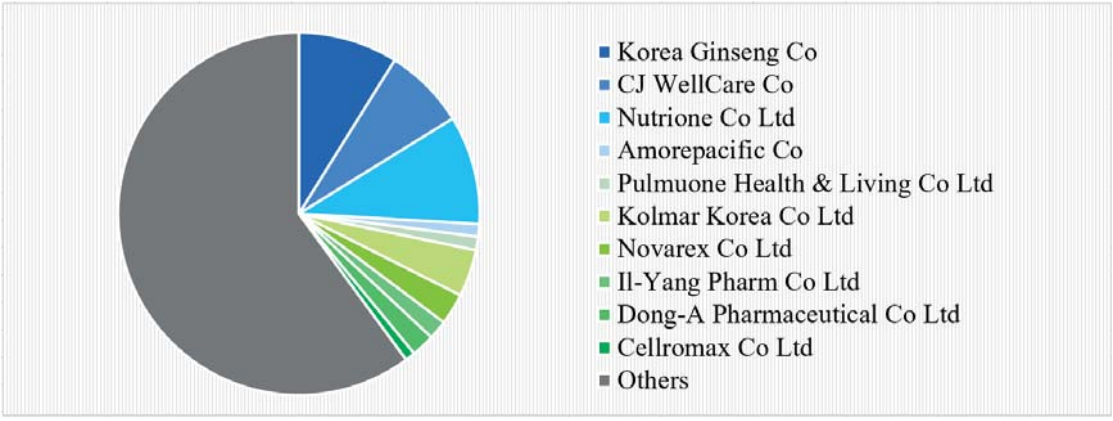

Fig. 3. **Market share distribution among leading dietary supplement manufacturers (2024)**
Note: Data reflects the cumulative revenue in the nutraceutical and 'inner beauty' segments.
* Author's compilation.

dominate the market through the large-scale application of fermentation biotechnology. For instance, CJ WellCare utilizes proprietary bacterial strains from traditional fermented foods to produce high-stability probiotics (BYOcore®). Their strategy focuses on the mass-market delivery of standardized nutraceuticals with high bioavailability.

Traditional Phytotherapy Leaders (Korea Ginseng Co — KGC): Companies like KGC exemplify a unique model in which traditional knowledge is validated by modern metabolomics. By employing over 130 scientists, KGC focuses on standardizing ginsenosides and bioconverting red ginseng, transforming it from a raw botanical into a clinically proven parapharmaceutical.

Innovators in 'Inner Beauty' and Cosmeceuticals (Amorepacific): This segment bridges the gap between cosmetics and nutrition. Companies in this group focus on the biochemical stabilization of structural biopolymers (collagen, hyaluronic acid) and utilize microencapsulation to ensure targeted.

CJ HealthCare Co is a leading player in the functional foods and dietary supplements market, recognized for introducing innovative products both in tablet and injectable form. The company offers a range of probiotic products (BYOcore®), edible cosmetic supplements for skin elasticity, hydration, and whitening (innerb®), functional beverages and supplements for weight control and metabolism boost (FatDown®), as well as mineral and multivitamin complexes and macronutrients (Dr.Nutri®). The company actively invests in R&D, creating products based on functional ingredients from fermented foods and traditional Korean ingredients [7, 11].

Nutrione Co Ltd is a subsidiary of LG Household & Health Care, specializing in the development, production, and sales of functional food products. Its portfolio includes vitamin complexes and macronutrients (BB Lab®, ScentoMega®), a line of personalized health supplements (myPuzzle®), and cosmetic products. The company is actively expanding its product assortment, focusing on personalized solutions and the use of ingredients from oriental medicine [8, 12].

Korea Ginseng Co (KGC) is the world's largest and most renowned ginseng producer, a subsidiary of Korea Tobacco & Ginseng. It is a leading company specializing in the production of dietary supplements and functional foods based on red and standard ginseng (Jung Kwan Jang®, Good Base®, and Cheon Nok®). KGC operates a powerful R&D institute, employing more than 130 scientists engaged in ginseng culture, development of new ingredients, and analysis of product safety and efficacy. KGC is actively expanding internationally, maintaining subsidiaries and offices in multiple countries, and adapting its products to local market needs and distribution channels [13].

Among the companies producing vitamin and mineral complexes, synbiotics, and weight-control supplements are Il-Yang Pharmaceutical Co Ltd and Cellromax Co Ltd [14, 15]. Novarex Co Ltd and Kolmar Korea Co Ltd [16–20] are the main manufacturers providing CMO services (contract manufacturing) for nutraceuticals, cosmetics, and other supplements.

Amorepacific Co is a well-known cosmetics giant that entered the nutraceuticals market with products combining cosmetic and nutraceutical approaches ("inner beauty"): collagen supplements, antioxidants, and detox programs (VitalBeautie®). The company promotes the concept of beauty from within, emphasizing the synergy of science, innovation, and natural ingredients [14, 18].

Pulmuone Health & Living Co Ltd, known as a brand of wholesome foods, conducts business across diverse areas: functional foods, meal services, concession businesses, and more. In the dietary supplements sector, it focuses on nutraceuticals and probiotics (YourLac®), anti-aging products (Pulmuone LOHAS®), and plant-based dietary supplements (Garden Me®) [15, 19].

The competitive advantage of Korean products lies not just in raw materials but also in biotechnology-based processing. For instance, targeted enzyme hydrolysis and microencapsulation (as seen in BYOcore® or innerb®) significantly enhance the bioavailability of poorly soluble biopolymers such as collagen and ginsenosides.

Among foreign companies, the undisputed leader is Amway Korea Ltd, owner of the Nutrilite® brand.

The raw materials used in the production of dietary supplements in South Korea are deeply rooted in the country's heritage of traditional Eastern medicine, particularly the Han'yak (한약) system, which blends ancient formulations with modern scientific validation. This cultural and technological synthesis enables manufacturers to create products that resonate with both traditional perceptions of wellness and contemporary consumer expectations.

The raw material base of the Korean market reflects a sophisticated synthesis of ethnopharmacology and advanced

bioprocessing. Unlike many global markets, Korean manufacturers emphasize the bioconversion of raw materials to enhance their functional properties:

Red Ginseng (Hongsam): The dominance of red ginseng is not merely cultural but technological. The repeated steaming and drying processes lead to the formation of rare ginsenosides (Rg3, Rh2), which exhibit higher antioxidant and anti-tumor activity than white ginseng. Recent trends include microbial fermentation of ginseng extract, which breaks down complex saponins into simpler metabolites (like Compound K), significantly improving intestinal absorption.

Medicinal Mushrooms and Botanicals: The use of Reishi and Shiitake is increasingly supported by submerged fermentation techniques, allowing for the controlled production of high-purity β-glucans with specific molecular weights.

Marine Biopolymers: Ingredients such as kelp and spirulina are processed using supercritical CO_2 extraction, removing heavy metals while preserving heat-sensitive polysaccharides and trace minerals.

Targeted Probiotics: A distinctive feature is the use of 'local' strains isolated from kimchi (e.g., Lactobacillus plantarum), which are better adapted to the Asian microbiome and exhibit superior stability in synbiotic formulations.

The integration of these natural ingredients is supported by advanced technological processes designed to optimize efficacy and consumer acceptability. Microencapsulation is extensively utilized to protect sensitive compounds such as probiotics, omega-3 fatty acids, and vitamins from degradation, while simultaneously improving bioavailability and masking undesirable flavors. Fermentation-based technologies enhance nutrient absorption and facilitate the development of synbiotic formulations tailored to the Korean microbiome. Nanodelivery systems are increasingly employed for lipophilic components such as coenzyme Q_{10} and polyphenols, ensuring more efficient cellular uptake. High-purity extraction techniques, including supercritical CO_2 extraction, cold pressing, and multistage filtration, are applied to obtain concentrated bioactive fractions from ginseng, mushrooms, herbs, and marine plants. In addition to traditional capsules and tablets, Korean manufacturers actively experiment with innovative dosage formats such as functional beverages, powdered sticks, jellies, and gel bars, catering to consumer preferences for convenience and palatability. Through this fusion of traditional knowledge and cutting-edge biotechnology, South Korea has established a highly competitive and export-oriented dietary supplement industry that continues to set benchmarks for quality, efficacy, and innovation [1–22].

The spread of unreliable information and deceptive claims regarding dietary supplements often contributes to growing consumer distrust. Overstated promotional messages and unsupported endorsements diminish confidence in the industry, making consumers more cautious about product safety and effectiveness. As a result, market demand may decline, slowing overall sector growth. That's why, in Korea, dietary supplements and food products are regulated within the framework established by the Ministry of Food and Drug Safety (MFDS), which provides the classifications in Fig. 2 are shown in Fig. 4. Recent regulatory updates by the MFDS in early 2026 have further tightened GMP requirements and nutritional labeling, emphasizing data integrity and evidence-based health claims, which align the Korean market with global EU and US pharmaceutical standards.

The regulation of the dietary supplements market is quite strict, creating both advantages and significant challenges for companies. On the one hand, government policy aims to

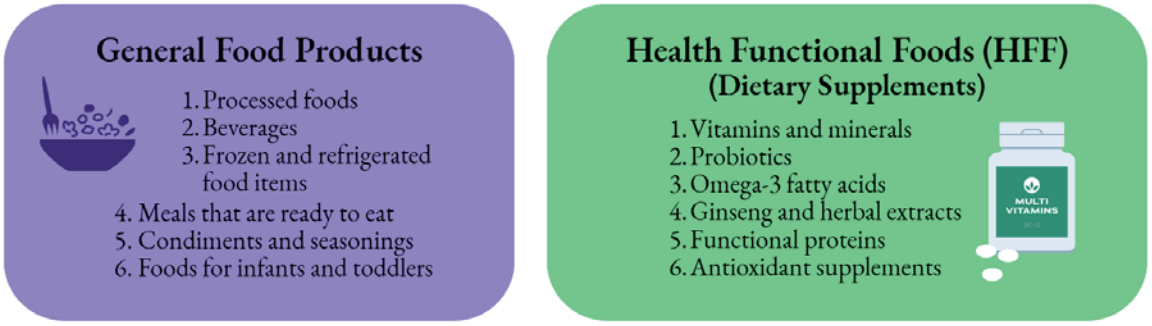

Fig. 4. **Classification of food product in Korea by Ministry of Food and Drug Safety**
* Developed by authors based on [17].

ensure product quality; on the other, it imposes substantial barriers to market entry. Companies seeking to operate in this sector must undergo complex and costly approval procedures and comply with high standards of production, labeling, and marketing. Frequent changes in regulatory policies further complicate these challenges, requiring constant monitoring, adaptation, and updates to formulations, labels, and advertising strategies. This is particularly burdensome for small businesses, which often lack sufficient resources to respond promptly to regulatory changes.

Foreign brands face additional obstacles due to significant differences between local and international standards. To enter the South Korean market, they often have to reformulate their products, adapt packaging, and undergo new certification procedures, all of which require time and considerable investment. The key legal framework governing this sector is the Health Functional Foods Act [23], which came into effect in January 2004. It stipulates that such products can only be sold in dosage forms — tablets, capsules, pills, or liquids. Compliance with these rules is overseen by the Ministry of Food and Drug Safety (MFDS).

Most dietary supplements in the country are classified as over-the-counter (OTC) products and are not reimbursed by the state, meaning that consumers must purchase them out of pocket.

Conclusions

The Korean dietary supplement market is showing a notable trend of increasing interest in personalized supplements. Faced with challenges such as regulatory restrictions, market saturation, and consumer skepticism, this sector offers significant growth opportunities. Companies that effectively address these challenges and take into account changing consumer preferences are successful in this dynamic market.

Author contributions

A.D. — conceptualization, study design, data collection, drafting the manuscript, and original draft preparation. O.S. — critical revision, manuscript editing, translation editing, and language polishing. and final approval of the manuscript T.K.— results discution. Authors have read and agreed to the published version of the manuscript.

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Conflict of interest

The authors declare no conflict of interest.

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РИНОК ДІЄТИЧНИХ ДОБАВОК У ПІВДЕННІЙ КОРЕЇ

А.О. Домашовець[1], *О.В. Швед*[1], *Т. Кирка*[2]

[1]Національний університет «Львівська політехніка», Україна
[2]University of Opole, Institute of Chemistry, Poland

E-mail: olha.v.shved@lpnu.ua

Мета. Досліджується галузь харчових добавок Південної Кореї, зосереджуючись на її поточному стані, ключових досягненнях та існуючих проблемах. Особлива увага приділяється стратегіям, що сприяють інноваціям, забезпечують стале зростання та підвищують міжнародну конкурентоспроможність, а також ролі ефективного регулювання у формуванні ринку.

Матеріали та методи. У дослідженні застосовувався методологічний аналіз та обробка літературних даних для оцінки розвитку технологій харчових добавок у біоіндустрії Південної Кореї. Структура оцінки враховувала такі фактори, як глобалізація, цифровізація та регуляторне узгодження з міжнародними стандартами, з особливим акцентом на ролі як вітчизняних, так і транснаціональних виробників. Результати підкреслюють динамічний характер біотехнологічних застосувань у нутрицевтичному секторі, пропонуючи розуміння, актуальне для потенційної адаптації на інших ринках, включаючи Україну.

Результати. У статті окреслено сучасний стан індустрії харчових добавок у Південній Кореї, висвітлюючи її структуру, динаміку зростання та інтеграцію в ширший сектор охорони здоров я та благополуччя. Особлива увага приділяється інноваціям у розробці продуктів, використанню передових біотехнологій та поєднанню традиційних фітотерапії з сучасними науковими підходами. Галузь аналізується в контексті національних стратегій зміцнення здоров'я та її зростаючої ролі на світовому ринку харчових добавок.

Висновок. Аналіз висвітлює як інноваційні досягнення, так і структурні пріоритети, що формують сучасну індустрію харчових добавок Південної Кореї.

Ключові слова: Південна Корея, біоіндустрія, харчова добавка, інновації, інвестиції.

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