

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Beer

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Report Highlights:

South Korea's imports of beer totaled a record high \$73.6 million (74.7 million liters) in 2012. Imports of American beer totaled \$6.5 million (9.4 million liters), making the United States the fourth largest supplier of imported beer to Korea after Japan, Netherland and Ireland. A 30 percent import tariff on American beer was scheduled to phase out over a seven year period under KORUS FTA (implemented in March 2012). This duty reduction and diversifying tastes of Korean consumers should provide American suppliers with new opportunities in the coming years.

General Information:

SECTION I. MARKET OVERVIEW

- Imports of beer into South Korea (herein after referred to Korea) totaled a record high \$73.6 million in 2012, up 26 percent from the previous year. In terms of volume, imports totaled a record high 74.7 million liters, up 27 percent.
- Despite challenging economic environment, Korea’s beer imports have continued a solid growth in recent years largely due to increased consumer demand for products of higher quality and diversified tastes.
- Local Korean brewers have dominated the market as indicated by the fact that local products accounted for a 94 percent of all beer supplied in the market in value (97 percent in volume) in 2011. However, current Korean regulations encourage the brewing industry to focus heavily on large-scale production of value-oriented products. As a result, development of small-scale breweries that can offer diversified products has been limited.
- Beer remained the most consumed alcohol beverage in Korea in 2011 by accounting for a 43 percent of all alcohol beverages supplied in the market in value (51 percent in volume). Beer supplied in the market in 2011 totaled 4 trillion won in value (1.8 billion liters in volume).
- Imports of American beer totaled \$6.5 million in 2012, up 15 percent from the previous year, making the United States the fourth largest supplier of imported beer to Korea following Japan, Netherland and Ireland. However, major competitors have outgrown the United States in recent years mainly by offering more diversified products. During the last five years (2008-2012), Japan and Netherland’s beer exports to Korea grew 546 percent and 62 percent in value respectively, while the United State’s exports declined 8 percent. Other contenders, including Ireland, China and Germany, have also achieved much higher export growth to Korea during the period than the United States.
- Reduction of import tariffs on American beer under Korea-United States Free Trade Agreement (KORUS FTA, implemented in March 2012) should generate new opportunities for American products in Korea. Development of craft beer industry in the United States is also likely to expand the demand for American beer in Korea.
- Korea is one of the leading markets for alcohol beverages in the world. According to a CNBC report, Korean per-capita alcohol consumption from alcohol beverage was 14.8 liter in 2011, 11th highest in the world. Although drinking is on a decline among the elderly population for health concerns, the market continues to gain a sizable number of new consumers from the young and female population. In addition, Korean consumers’ taste, so far anchored around soju and Scotch whiskey, are expected to diversify into wider range of products in the coming years.

SECTION II. MARKET SECTOR OPPORTUNITIES AND THREATS

Table 1: Opportunities & Challenges of the Distilled Spirits Market in Korea

Opportunities	Challenges
Shift in consumption trends and demographics of drinking population generate demand for products of higher quality and diversified tastes.	The Korean beer market is dominated by local brewers who offer a strong portfolio of value-oriented products, making imported beer difficult to compete in price.

Many Koreans maintain a close tie with the United States through travel and business exchange. Many of them actively follow new product and consumption trends emerging in the United States.	Japan and European suppliers deploy aggressive export programs targeting Korea. As a result, many Korean consumers harbor a belief that Japan and European countries are the source of better quality beer in the world.
Implementation of KORUS FTA encourages Korean consumers to pay greater attention to American products. Reduction of import tariffs under the KORUS FTA also helps American products better compete in Korea.	Not many Korean consumers understand the value and quality that American beer has to offer. Particularly, American craft beer has yet to develop recognition among the mainstream beer drinkers in Korea.

1. Alcohol Beverage Market Trends in Korea

- South Korea is one of the leading markets in the world for alcohol beverages. Drinking is considered an important part of social life and is often encouraged at social and business occasions. In terms of volume, each Korean adult consumed on average 81 bottles of soju (330 ml bottle), 86 bottles of beer (500ml bottle), and 10 bottles of whiskey (1 liter bottle) in 2011.
- The value of alcohol beverages supplied in the market totaled KRW 9.4 trillion won in 2011 (roughly \$8.1 billion, \$1 = 1,155 won as of year-end 2011). Beer and soju, mostly from local processors, together accounted for a 74 percent of the total alcohol beverages supplied in value. Imported products, mainly whiskey and wine, accounted for a 21 percent of the products supplied.

Table 2: Value of Alcohol Beverages Supplied in Korea (2011)

Product Category	Sub-Total	Local Products	Imported Products
Beer	4,049	3,800	250
Soju	2,873	2,870	3
Whiskey	1,167	117	1,050
Mak-Gul-Lee*	451	451	0
Fruit Wine and Others	872	230	641
Total	9,412	7,468	1,944

Source: Korea Alcohol Beverage Industry Association, Korea Wine & Spirits Importers Association

* Mak-Gul-Lee is a cloudy type rice wine

Unit: Billion won (KRW)

Table 3: Volume of Alcohol Beverages Supplied in Korea (2011)

Product Category	Sub-Total	Local Products	Imported Products
Beer	1,797,752	1,738,759	58,993
Soju	1,178,240	1,178,135	105
Whiskey	21,443	1,860	19,583
Mak-Gul-Lee	412,269	412,269	0
Fruit Wine and Others	518,223	473,244	44,979
Total	3,515,658	3,391,998	123,660

Source: Korea Alcohol Beverage Industry Association, Korea Wine & Spirits Importers Association

Unit: Kiloliter

- Health concerns among the general public as well as increased female consumers for alcohol beverage generate strong demand for products with less alcohol. Soju consumption has remained strong in

recent years partly backed by continued launchings of new products that contained less alcohol. Soju generally contained over 20 percent alcohol in the past but most of the products offered in the market today contain less than 19 percent alcohol. Soju is also often consumed in “boilermakers” blended with soft drinks or beer. On-going popularity of Mak-Gul-Lee (cloudy type rice wine that contains 5 to 10 percent alcohol) and grape wine also partly stems from health concerns.

- In 2011, Korea’s distilled spirits imports totaled \$384 million (168 million liters), up 10 percent from the previous year. The United States remained the third largest exporter of consumer-oriented distilled spirits to Korea after United Kingdom and France. Imports of American distilled spirits totaled \$7.5 million (1.5 million liters). A 20 percent import tariff on American Bourbon whiskey was eliminated under KORUS FTA in March 2012. Through October 2012, imports of consumer-oriented spirits from the United States increased 14 percent to \$7.1 million, compared to the same period of previous year. Marketers point out that Korea is a highly polarized market for distilled spirits. The consumption is heavily skewed to low price products led by soju as well as to premium products led by Scotch whiskey, leaving a big void in the middle. For more information about the distilled spirits market in Korea, please refer to [Korea Distilled Spirits Market Brief 2013](#) written by Agricultural Trade Office (ATO) of the U.S. Embassy Seoul (available from www.atoseoul.com and www.fas.usda.gov).
- Consumption of grape wine is expected to continue a solid growth in the coming years. Due to unfavorable growing condition, most of wine sold in Korea is imported products. After experiencing a setback during 2009-2010, Korea’s imports of wine rebounded in 2011 to \$132 million. Imports in the first half of 2012 totaled \$67.6 million, up 12.3 percent from the same period of 2011. Following France, Chile, and Italy, the United States remained the fourth largest supplier of wine to Korea during the first half of 2012 by exporting \$7.4 million, up 14.5 percent from the same period of 2011. Implementation of KORUS FTA eliminated a 15 percent import tariff on American wine, and leveled the playing field for American suppliers competing with Chilean and European wineries. For more information about the wine market in Korea, please refer to [Korea Wine Market Brief 2012](#) written by Agricultural Trade Office (ATO) of the U.S. Embassy Seoul (available from www.atoseoul.com and www.fas.usda.gov).

2. Beer Market in Korea

2-1. Local Brewers

- The Korean beer market has been dominated by the two leading local brewers over the years, Oriental Brewery Company Co., Ltd. (OB) and Hite-Jinro Co. (Hite). Industry data indicates that the 1.8 billion liters of beer locally brewed in 2011 was fairly evenly split between OB and Hite.
- It is notable that OB was acquired by Interbrew (now Anheuser-Busch InBev) in 1998 and was again sold to an international investment funds, KKR in 2009. As a result, OB currently brews and bottles Budweiser and Hoegaarden beer in Korea for local distribution under partnership with AB InBev. In addition, OB imports of products under AB InBev portfolio into Korea, including Bud Ice, Beck’s, Stella Artois, Leffe and Löwenbräu. On the other hand, Hite is a locally owned company and is part of the largest alcohol beverage company in Korea, Hite-Jinro Co.

Table 4: Two Leading Korean Brewers

	Oriental Brewery Company Co., Ltd.	Hite-Jinro Co.
Production in 2011	930,000 Kiloliters	920,000 Kiloliters

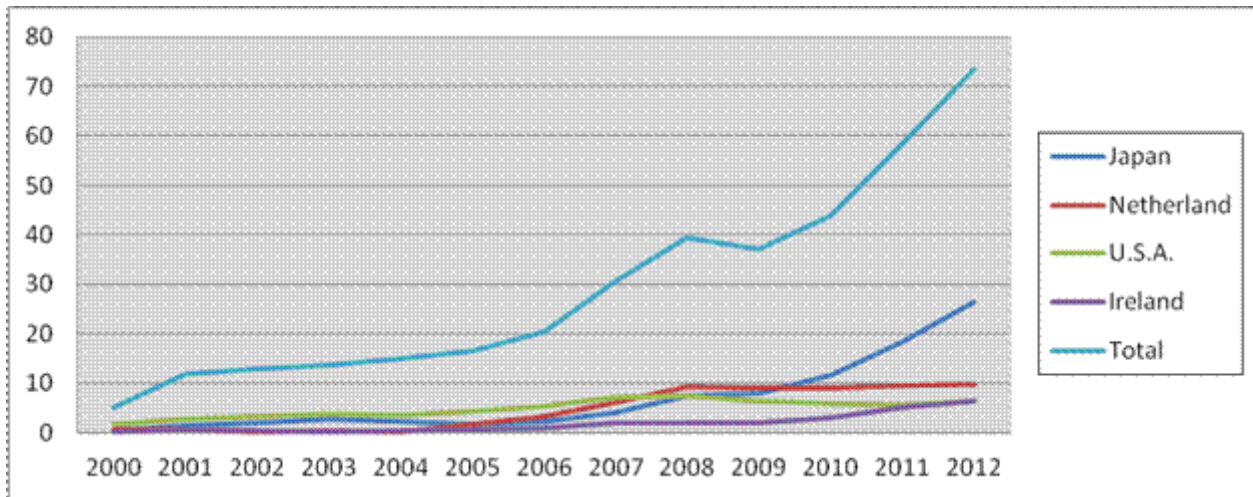
Major Brands	Cass, OB, Cafri	Hite, Max, d, S, Stout
Imported Brands	Budweiser, Hoegaarden, Bud Ice, Beck's, Stella Artois, Leffe and Löwenbräu, Suntory	Kirin
Internet Home-page	www.obbeer.co.kr	www.hitejinro.com

- Larger style beer accounts for a majority of beer produced in Korea. Although currently taking a small portion of the total market, local production of stout and dark style beer is likely to increase in the coming years.
- Korean government allowed 'micro-brewery' business for on-premise sales in 2002 and as a result many micro-brewery pubs have been established in metropolitan markets. However, micro-brewery is likely to remain a small niche of the beer market mainly because sales of micro-brewed beer are limited to within pubs directly owned by the brewery. In addition, annual production of a micro-brewery is limited to 300,000 liters. A micro-brewery is required to have a facility that can brew minimum 5,000 liters each time.
- Korean government regulation requires minimum 150,000 liters of brewing facility for a regular brewery to sell the product in retail bottles openly to retail and food service outlets. This requirement has reportedly limited development of small-scale breweries in Korea.

2-2. Imported Beer

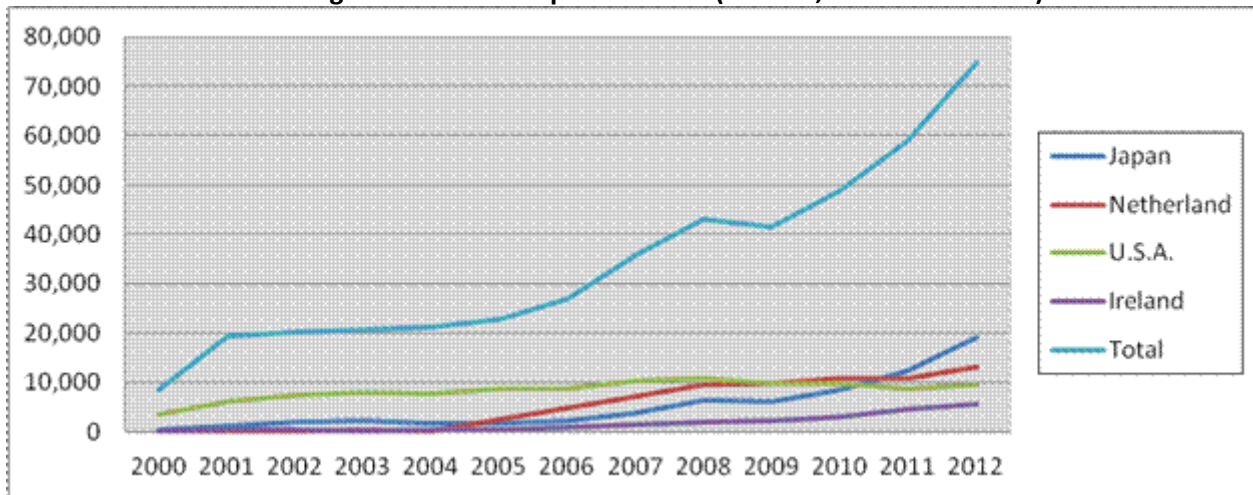
- Japan has stepped up to the leading supplier of imported beer to Korea since 2010 mainly by developing strategic partnerships with some of major Korean food and beverage conglomerates. Current partnerships include Hite-Kirin, Oriental Brewery-Suntory, and Mail Dairy-Sapporo. Imports of Japanese beer to Korea totaled \$26.4 million in 2012, up 45 percent from the previous year. Market analysts point out that 'dry' taste of Japanese beer has made a good appeal to the Korean beer consumers.
- Many European Union (EU) countries, led by Netherland, remained among the top ten suppliers of imported beer to Korea. Imports from key EU country in 2012 amounted to \$9.9 million for Netherland (up 4 percent from the previous year), \$6.5 million for Ireland (up 28 percent), \$5.8 million for Germany (up 30 percent), and \$2.1 million for Belgium (up 18 percent). The 30 percent base import tariff on EU beer was scheduled to phase out over an eight year period under Korea-EU Free Trade Agreement (implemented on July 1, 2011). EU beer should enter Korea duty-free on July 1, 2018.
- Korea's beer imports from the United States rebounded significantly in 2012, amounting to \$6.5 million, up 19 percent from the previous year largely due to implementation of Korea-United States Free Trade Agreement implemented on March 15, 2012. The 30 percent base import tariff on American beer was scheduled to phase out over a seven year period under the free trade agreement. American beer will enter Korea duty-free on January 1, 2018.
- However, the United States was outpaced by Ireland and stepped down to the fourth largest supplier of imported beer to Korea in 2012 in terms of value. In terms of volume, the United States remained the third largest supplier.
- Korea's beer imports are likely to continue a strong growth in the coming years as local consumers seek for products of higher quality and diversified tastes.

Figure 1: Korea's Imports of Beer (HS2203, Value: Million \$US)



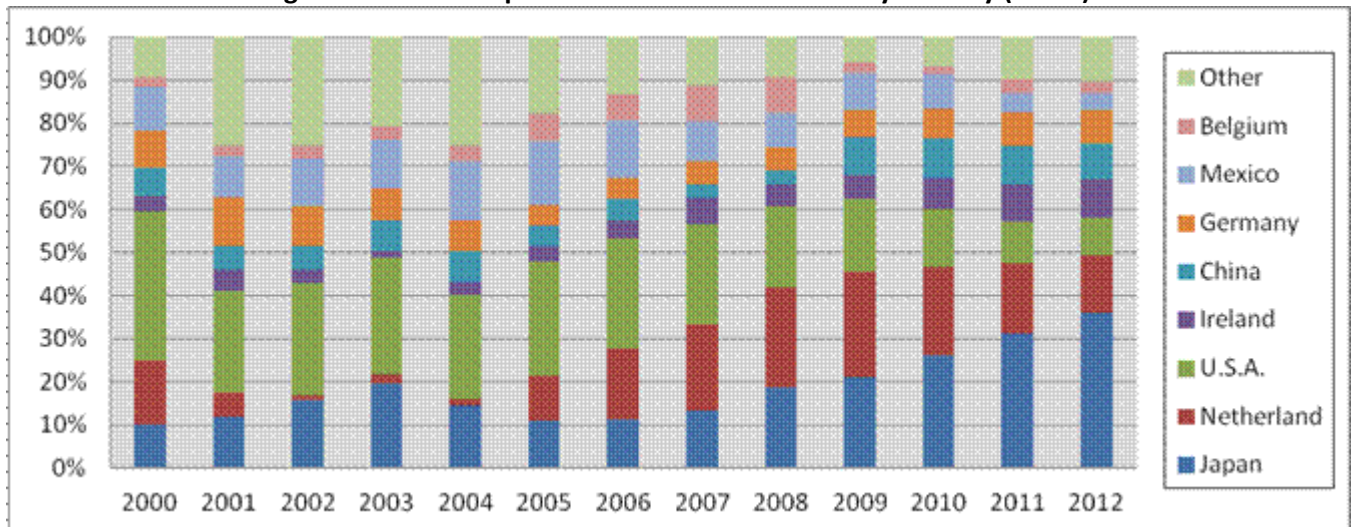
Source: Korea Trade Information Service (KOTIS) Database

Figure 2: Korea's Imports of Beer (HS2203, Volume: Kiloliter)



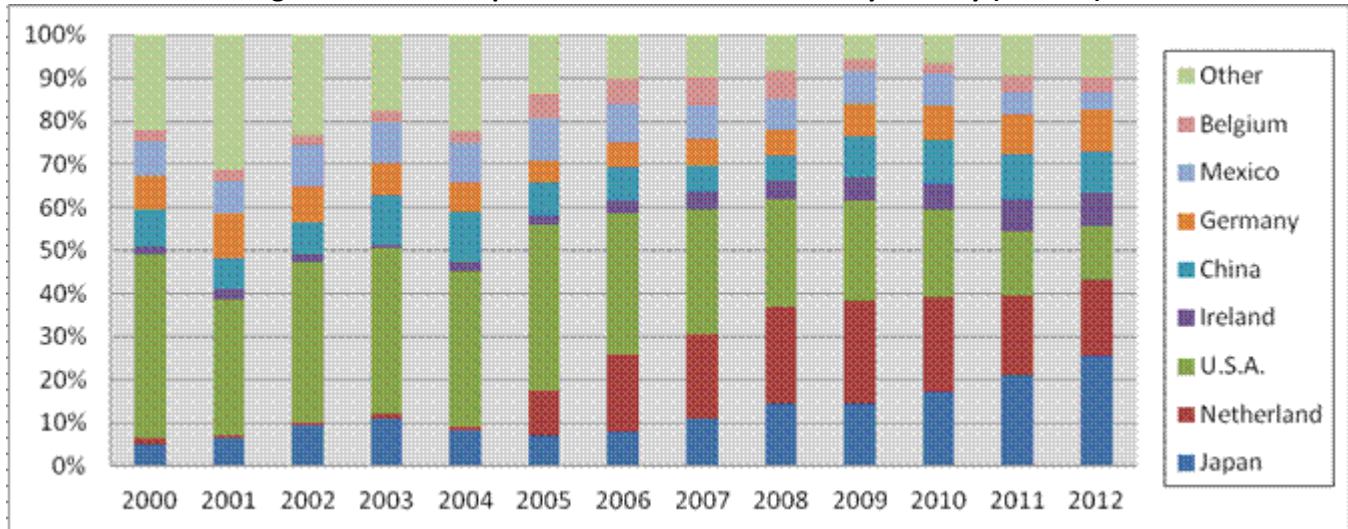
Source: Korea Trade Information Service (KOTIS) Database

Figure 3: Korea's Imports of Beer – Market Share by Country (Value)



Source: Korea Trade Information Service (KOTIS) Database

Figure 4: Korea's Imports of Beer – Market Share by Country (Volume)



Source: Korea Trade Information Service (KOTIS) Database

3. Distribution Channel

- By law, only licensed importers are allowed to import alcohol beverages, including beer. Currently there are over 300 licensed alcohol beverage importers, but about 50 of them currently maintain an active business. Moreover, a small number of leading importers account for a majority share of total imports. Many of the leading importers are members to the Korea Wine & Spirits Importers Association (KWSIA). Contact listings of key importers are available to American suppliers upon request from Agricultural Trade Office (ATO) of the U.S. Embassy Seoul (atoseoul@fas.usda.gov, www.atoseoul.com).
- Importers are allowed to sell directly to wholesalers and retailers (restaurants and liquor stores). Wholesale and retail sales of alcohol beverages also require official permits. On-line sales of alcohol beverages, including through the internet, are currently banned except for registered traditional liquor products of limited production.
- Importers may sell directly to large retail customers such as supermarket chains or five star hotels. However, importers rely heavily on wholesalers when distributing to smaller retailers or regional markets.
- Currently, there is no zoning regulation in Korea that limits the number of retail outlets for alcohol beverages in a given area, which explains the high number of bars and liquor shops in the market. According to Korean government data, there were over 130,000 bars and salons in Korea in 2009, up 12 percent from 2005. By law, on-trade liquor retailers (bars and restaurants) are not allowed to buy alcohol beverages from off trade liquor retailers (liquor shops and supermarkets).
- According to Euromonitor, on-trade accounted for 51 percent of beer distributed in Korea in 2011 in terms of volume. Marketers point out that off-trade consumption has shown higher growth than on-trade in recent years mainly due to elevated economic concerns. Tighter corporate spending on entertainment accounts has also been a cause of stagnant growth of on-trade liquor sales.

4. Market Entry Strategy

Below are key events and marketing tools recommended for new-to-market suppliers targeting Korea:

(1) Trade Shows:

- Seoul Food & Hotel (www.seoulfoodnhotel.co.kr) is the most important food trade show held annually in Korea and is attended by a large number of international suppliers and local distributors. This is the only show in Korea that is officially endorsed and sponsored by USDA/FAS. The show date in 2013 is May 14-17. For registration information of the U.S. Pavilion, please contact the organizer, Oak Overseas (rhoood@oakoverseas.com).
- The Seoul International Wines & Spirits Expo (www.swsexpo.com) is a key trade show in Korea dedicated to the alcohol beverage market. Organized by the Korea Wines & Spirits Importers Association, this show has brought together many foreign suppliers and local traders over the years. The show date in 2013 is April 27-27.

(2) Local Organizations and Opinion-Leaders: There are many different bodies of opinion leaders for alcohol beverages emerging in Korea. Academies, Internet-based communities, periodic journals, and not-for-profit organizations are actively engaging with the general consumers and exert significant influence on new consumption trends.

- Korea Wine & Spirits Importers Association (KWSIA)
E-mail: webmaster@kwsia.or.kr
www.kwsia.or.kr
- Korea Alcohol & Liquor Industry Association (KALIA)
www.kalia.or.kr

(3) American Trade Promotion Organizations: Various regional and industry organizations in the United States offer marketing supports to their member suppliers targeting foreign markets. General tools offered by the organizations include trade delegations to key foreign markets and exhibition booths in key trade shows.

- American Brewers Association (ABA)
736 Pearl Street, Boulder, CO 80302
Telephone: 303-447-0816
E-mail: info@brewersassociation.org
- Food Export Association of the Midwest USA
309 W. Washington St., Suite 600
Chicago, Illinois 60606
Telephone: 312-334-9200 Fax: 312-334-9230
E-mail: thamilton@foodexport.org
Website: www.foodexport.org
- Western United States Agricultural Trade Association (WUSATA)
2500 Main Street, Suite 110, Vancouver, WA 98660-2697, USA
Telephone: 360-693-3373 Fax: 360-693-3464
E-mail: janet@wusata.org
Website: www.wusata.org
- Food Export USA - Northeast Region of the United States
150 S. Independence Mall West, 1036 Public Ledger Building
Philadelphia, PA 19106, USA
Telephone: 215-829-9111 Fax: 215-829-9777
E-mail: jcanono@foodexportusa.org
Website: www.foodexportusa.org

- Southern United States Agricultural Trade Association (SUSTA)
2 Canal Street Suite 2515, New Orleans, LA 70130, USA
Telephone: 504-568-5986 Fax: 504-568-6010
E-mail: jim@susta.org
Website: www.susta.org

SECTION III. MARKET ACCESS

1. Tariffs and Taxes

Korea applies a complicated tariff and tax system to imported alcohol beverages. The table below summarizes tariff and local taxes applied to imported American beer as of 2013.

Product	Import Tariff	Liquor Tax	Education Tax	Value Added Tax
Beer	21.4%	72%	30%	10%

The following table illustrates the effects of import tariff and local taxes on a bottle of \$2 (CIF import value) American beer imported into Korea:

A	CIF* Invoice Value	\$2.00
B	Import Tariff: A x 21.4%	\$0.43
C	Liquor Tax: (A+B) x 72%	\$1.75
D	Education Tax: C x 30%	\$0.52
E	Subtotal: (A+B+C+D)	\$4.70
F	Value Added Tax **: E x 10%	\$0.47
G	Handling fees for customs clearance ***: A x 8%	\$0.16
H	Total cost of beer upon customs clearance: (E+F+G)	\$5.33

* CIF is an export price inclusive of insurance and freight cost.

**The paid Value Added Tax (VAT) is eventually refunded to the importer as the tax is carried over to the consumer.

***In addition to import tariff and taxes, additional cost of about 8 percent of CIF value will occur for miscellaneous expenses, including paperwork, inspection, warehousing, and transportation. The amount of this additional cost depends mainly on the kind of inspection to which the shipment is subject. For example, warehousing fee and inspection fee will increase significantly if a detailed chemical inspection is required instead of document inspection.

2. Inspections & Food Safety Standards

Imported foods and beverages are subject to Ministry of Health and Welfare (MHW) Food Quarantine inspections. The Korea Food & Drug Administration (KFDA) under MHW is responsible for executing all inspections. For alcohol beverages, National Tax Service (NTS) is additionally involved in the administration of inspection and safety standards. There are two kinds of inspections: detailed inspection (chemical analysis test) and visual inspection (document inspection).

The first commercial shipment of new-to-market product is mandated to a detailed inspection, which under Korean law should take no longer than 10 working days (in case of incubation test, up to 14 working days). In practice, however, importers claim that it could take longer. For detailed inspection, importers are required to submit one sample bottle of each product to the inspection authority along with detailed product information such as major ingredient list and processing flow chart. Once detailed inspection on the first shipment confirms

no potential health concerns, subsequent shipments of the same product will be subject to visual (document) inspections. Visual inspection should take no longer than 3 working days provided that the product in the subsequent shipment is identical to the product in the first shipment with respect to label, product name, ingredients, and net volume (vintage change is not recognized as a reason for detailed inspection). However, KFDA maintains a policy to require detailed inspections randomly on a significant portion of subsequent shipments of identical products. For more information about Korean regulations and standards on imported agricultural products, please refer to [FAIRS report](#) written by the Agricultural Affairs Office of the U.S. Embassy Seoul (available in www.fas.usda.gov under Attaché Report section).

When a new food safety issue arises, local authority may enforce additional safety standards and mandatory tests on imported products associated with the risk. For example, Chinese distilled spirits have been subject to an additional inspection for contamination by environmental hormones recently after the issue was publicized by the local press.

Below table summarizes key Korean food safety standards for beer designated in the Korea Food Code (administered by KFDA) and National Tax Office Decree:

Product	Issue	Standards
Beer	Major ingredients	Malt (barley and wheat), Hop, Water, Starch ingredient (including wheat, rice, barley, corn, potato, and starch)
	Methanol	0.5 mg/ml or less
	Alcohol content	(1) 25% (v/v) or less (2) Labeled alcohol content should be within 0.5% point from actual content measured
	Additives allowed	Aspartame, Stevioside, Sorbitol, Sucralose, Acesulfame K, Erythritol, Xylitol, Milk, Milk powder, Milk cream, Casein, Arabic gum, Pectin, Carbon dioxide gas, Sugars, Caramel, etc.

Use of additives such as preservatives and coloring agents in distilled spirits is subject to the Korea Food Additive Code administered by KFDA. As of December 2011, Korea had a positive list of 653 approved food additives. Food additives are grouped into four categories: (a) chemical synthetics, (b) natural additives, (c) mixed substances, and (d) sanitizers. Designated uses and tolerance levels of each additive are established on a product-by-product basis. This sometimes creates difficulties for American suppliers as uses and tolerances set in Korea can vary from international CODEX standards and/or American standards. English version of the Korea Food Additive Code is available for view from KFDA's internet homepage (http://www.kfda.go.kr/fa/ebook/egongjeon_intro.jsp).

3. Labeling

Korean law requires a separate Korean language label on imported distilled spirits. In most cases, the Korean language label (sticker) is attached to the back of the bottle manually by the importer in the duty-free warehouse before customs inspection. The Korean language label should contain the following information:

1. Product name
2. Country of origin
3. Product type
4. Product volume
5. Importer's name and phone number

6. Alcohol percentage
7. Name of major ingredients
8. Name of food additives used
9. Bottling date (not required if shelf life is shown)
10. Shelf life (expiration date)
11. Mandatory health warning clause
12. Mandatory warning clause against liquor sales to minors
13. Name of designated distribution channel (only required on bottles sold in retail stores. Bottles sold in retail stores should be marked "For Home Use". Bottles sold in large-scale retail stores should be marked "For Large Size Stores")

Fruit images or photos are not allowed on the label of food and beverage products if the product contains synthetic flavors only. Label of beer can include "Lite" only if the product contains 30 kcal of calorie per 100ml or less.

SECTION IV. KEY CONTACTS AND FURTHER INFORMATION

- For further information about the Korean agricultural market, please contact:

U.S. Agricultural Trade Office Seoul
Korean Address: Room 303, Leema Building, 146-1, Susong-dong, Jongro-gu, Seoul, Korea
U.S. Mailing Address: U.S. Embassy Seoul, Unit 15550-ATO, APO, AP 96205-5550
Telephone: 82-2 397-4188 Fax: 82-2 720-7921
E-mail: atoseoul@fas.usda.gov
Internet homepage: www.atoseoul.com

Agricultural Affairs Office, U.S. Embassy Seoul
Korean Address: U.S. Embassy, 82, Sejong-ro, Jongro-gu, Seoul, Korea
U.S. Mailing Address: U.S. Embassy Seoul, Unit 15550-AgAff, APO, AP 96205-5550
Telephone: 82-2 397-4297 Fax: 82-2 738-7147
E-mail: agseoul@usda.gov

- For more information on how you can register for USDA/FAS' Supplier List:
The United States Department of Agriculture's Foreign Agricultural Service (USDA/FAS) offers information and services that can be beneficial to both new and experienced exporters. For example, the U.S. Suppliers Service is a searchable database of over 5,000 U.S. exporters and their products, which is used by USDA/FAS to help facilitate connecting potential buyers with U.S. suppliers. This database is used by more than 85 USDA FAS Overseas offices to help export agents, trading companies, importers and foreign market buyers locate U.S. suppliers. It is also used to recruit U.S. exporters to participate in market development activities sponsored by USDA and federal export programs.

You can register online for this service at
http://www.fas.usda.gov/agx/partners_trade_leads/us_suppliers_list.asp

- For further information about sanitary and phytosanitary requirements, please contact:

U.S. Animal Plant and Health Inspection Service Seoul (APHIS)

Korean Address: Room 303, Leema Building, 146-1, Susong-dong, Jongro-gu, Seoul, Korea
U.S. Mailing Address: U.S. Embassy Seoul, Unit 15550-APHIS, APO, AP 96205-5550
Telephone: 82-2 725-5495 Fax: 82-2 725-5496
E-mail: yunhee.kim@aphis.usda.gov
Internet Homepage: www.aphis.usda.gov

- For information on the non-agricultural commercial and industrial products in Korea, please contact:

U.S. Commercial Service

Korean Address: U.S. Embassy, 82, Sejong-ro, Jongro-gu, Seoul, Korea
U.S. Mailing Address: U.S. Embassy Seoul, Unit 15550-USCS, APO, AP 96205-5550
Telephone: 82-2 397-4535 Fax: 82-2 739-1628
E-mail: Seoul.office.box@mail.doc.gov
Homepage: www.buyusa.gov/korea