



Hot Drinks in South Korea

November 2025

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EXECUTIVE SUMMARY

Tea outperforms, as consumers look for small indulgences and healthy options

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Retail value growth, but volumes decline, and performances vary widely

The search for wellness in a chaotic world

Companies increasingly aim to offer affordable sustainability in hot drinks

Players use different strategies to address high prices and frustrated consumers

WHAT'S NEXT?

Convenient, healthy and sustainable products expected to drive growth

Companies expected to innovate to meet changing consumer demands

Moving forward, digital engagement will be critical for growth

COMPETITIVE LANDSCAPE

Dongsuh's wide portfolio and brand loyalty contribute to its continued lead

Nestlé performs well, especially in fresh ground coffee pods, but changes are ahead

CHANNELS

Offline retail maintains its distribution dominance, although its share falls

Retail e-commerce sees a rising share, and even overtakes offline retail in tea

The rising share of foodservice volume sales continues

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SOURCES

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[Coffee in South Korea](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising retail value sales of fresh coffee outweigh decline for instant coffee

INDUSTRY PERFORMANCE

Little value movement in retail as consumers turn to affordable foodservice chains

Demand for fresh coffee rises strongly as consumers value quality

WHAT'S NEXT?

Fresh coffee set to drive growth, but affordability will remain important

Dongsuh Foods exemplifies the move towards sustainability

Nestlé Korea offers a combination of quality and sustainability with its recent launch

COMPETITIVE LANDSCAPE

Dongsuh Foods benefits from a loyal consumer base and zero sugar launches

Nestlé sees dynamism, but also challenges

CHANNELS

Hypermarkets performs well due to a wide product range, with retail e-commerce also continuing to rise

Pop-up stores used for marketing, offering coffee experiences to generate interest

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[Tea in South Korea](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Exceptional growth is driven by green tea, with its dynamism set to be maintained

INDUSTRY PERFORMANCE

Interest in health and wellness drives dynamism for tea, especially in retail

Green tea sees exceptional growth thanks to its image, health benefits and versatility

WHAT'S NEXT?

As tea is increasingly becoming a lifestyle trend, dynamism is expected to continue

Functional tea could be a growth opportunity

More companies are expected to move towards sustainable practices

COMPETITIVE LANDSCAPE

Osulloc addresses its declining share with a focus on matcha

Dongsuh Foods adapts to consumer trends with clarity and convenience

CHANNELS

Retail e-commerce sees the most dynamic sales increase and becomes dominant

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[Other Hot Drinks in South Korea](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Other hot drinks faces challenges from declining birth rate and health trend

INDUSTRY PERFORMANCE

Health trend hampers growth and prompts a shift to lower sugar products

Challenge from rising cocoa prices

WHAT'S NEXT?

Value and volume declines anticipated due to the falling birth rate and changing consumer behaviour

An increasing number of low sugar launches anticipated

Opportunities by offering functional non-chocolate-based flavoured powder drinks

COMPETITIVE LANDSCAPE

Jetty and Mite from Dongsuh Foods remain staples for young children

Smaller players take share from the leaders

CHANNELS

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CATEGORY DATA

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