



Coffee in South Korea

November 2025

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Coffee in South Korea - Category analysis

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

Coffee delivery reshapes the distribution landscape

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Hot Drinks in South Korea - Industry Overview

EXECUTIVE SUMMARY

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

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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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