



Euromonitor  
International

# RTD Tea in South Korea

November 2025

Table of Contents

## RTD Tea in South Korea - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Health and wellness trends and differentiation shape RTD tea in South Korea

#### INDUSTRY PERFORMANCE

RTD tea gains momentum as a wellness-driven beverage choice in South Korea

Functional RTD teas reshape South Korea's soft drinks landscape

#### WHAT'S NEXT?

Steady growth to be driven by innovation and health trends

RTD tea brands to capitalise on different tea bases and the wellness trend

Differentiation will be key to success in RTD tea in South Korea

#### COMPETITIVE LANDSCAPE

Lotte Chilsung maintains its lead, but Dongwon benefits from aggressive promotion

Oi Ocha attracts younger consumers by incorporating matcha-based variants

#### CHANNELS

Convenience stores reigns supreme in RTD tea distribution

Online retail reshapes RTD tea distribution and innovation in South Korea

#### CATEGORY DATA

Table 1 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 2 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 3 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 5 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 6 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 7 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 8 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 9 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 10 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 11 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 12 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 13 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

## Soft Drinks in South Korea - Industry Overview

### EXECUTIVE SUMMARY

Health trends and channel shifts are reshaping soft drinks

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Health trends drive polarisation amidst static volumes

Inflation fuels shift to private label and varied pack sizes

Health-conscious consumers fuel premiumisation in soft drinks

Soft drinks embraces cultural trends for growth in South Korea

#### WHAT'S NEXT?

Health awareness and regulation to reshape soft drinks in South Korea  
Players will move towards premiumisation, eco-packaging, and digital channels

## COMPETITIVE LANDSCAPE

Lotte Chilsung and Coca-Cola Drive Innovation and Health Trends  
Character-led innovation drives dynamic growth for Paldo

## CHANNELS

Convenience stores is an important distribution channel due to on-the-go appeal  
Retail e-commerce platforms are driving efficiency and value in soft drinks  
Foodservice sees steady but sluggish recovery towards pre-pandemic levels

## MARKET DATA

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025  
Table 15 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025  
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025  
Table 17 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025  
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025  
Table 19 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025  
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025  
Table 21 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025  
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025  
Table 23 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025  
Table 24 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025  
Table 25 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025  
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025  
Table 27 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025  
Table 28 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025  
Table 29 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025  
Table 30 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025  
Table 31 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025  
Table 32 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025  
Table 33 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025  
Table 34 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025  
Table 35 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025  
Table 36 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025  
Table 37 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025  
Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025  
Table 39 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025  
Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030  
Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030  
Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030  
Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030  
Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030  
Table 45 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030  
Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030  
Table 47 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030  
Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030  
Table 49 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

## APPENDIX

Fountain sales in South Korea

## SOURCES

### Summary 1 - Research Sources

#### About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link [www.euromonitor.com/rtd-tea-in-south-korea/report](http://www.euromonitor.com/rtd-tea-in-south-korea/report).