



# Consumer Foodservice in South Korea

March 2026

Table of Contents

## Consumer Foodservice in South Korea

### EXECUTIVE SUMMARY

Lacklustre performance reflects weak purchasing power

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Economic headwinds eat into revenue performance

Restaurants roll out direct to consumer initiatives

Experiential offerings and loyalty programmes gain traction

#### WHAT'S NEXT?

Modest outlook for consumer foodservice

Automation and AI are embraced to enhance efficiency and reduce labour costs

Sustainability and focus on Gen Z/Alpha

#### COMPETITIVE LANDSCAPE

Starbucks Coffee Korea maintains its lead

Ashley's family restaurant strikes chord with price sensitive consumers

International foodservice brands enter South Korea

#### CHANNELS

Chained foodservice operators strengthen position

Cost pressures drive roll-out of compact store formats

#### MARKET DATA

Table 1 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 2 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 3 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 4 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 5 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 6 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 7 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 8 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 9 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 10 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 11 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 12 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 13 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

#### DISCLAIMER

#### SOURCES

Summary 1 - Research Sources

## Cafés/Bars in South Korea

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Cafés/bars faces difficult trading period

#### INDUSTRY PERFORMANCE

Changing drinking culture and financial squeeze is felt by cafés/bars

Polarisation in coffee consumption behaviours  
Local Bingsu is key driver as new formats emerge

#### WHAT'S NEXT?

Cafés face the implications of reaching saturation  
Unmanned robot cafés are set to emerge in South Korea  
Speciality coffee brand launches personalised roasting service

#### COMPETITIVE LANDSCAPE

Starbucks Coffee Korea Co Ltd enjoys leading position  
Explosive growth of Mega MGC Coffee franchise stores  
Independents struggle compared to chained players

#### CATEGORY DATA

Table 14 - Cafés/Bars by Category: Units/Outlets 2020-2025  
Table 15 - Sales in Cafés/Bars by Category: Number of Transactions 2020-2025  
Table 16 - Sales in Cafés/Bars by Category: Foodservice Value 2020-2025  
Table 17 - Cafés/Bars by Category: % Units/Outlets Growth 2020-2025  
Table 18 - Sales in Cafés/Bars by Category: % Transaction Growth 2020-2025  
Table 19 - Sales in Cafés/Bars by Category: % Foodservice Value Growth 2020-2025  
Table 20 - GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2021-2025  
Table 21 - GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2022-2025  
Table 22 - Forecast Cafés/Bars by Category: Units/Outlets 2025-2030  
Table 23 - Forecast Sales in Cafés/Bars by Category: Number of Transactions 2025-2030  
Table 24 - Forecast Sales in Cafés/Bars by Category: Foodservice Value 2025-2030  
Table 25 - Forecast Cafés/Bars by Category: % Units/Outlets Growth 2025-2030  
Table 26 - Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2025-2030  
Table 27 - Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2025-2030

#### DISCLAIMER

[Full-Service Restaurants in South Korea](#)

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Full-service restaurants is impacted by weaker purchasing power

##### INDUSTRY PERFORMANCE

Full-service restaurants under pressure from self-service cafeterias  
Affordable premium restaurants gain appeal in challenging economy  
Coupang delivery gains ground with Wow Membership scheme

#### WHAT'S NEXT?

Cheap premium trend is likely to expand due to inflation  
Renewed focus on Restaurant Meal Replacement (RMR)  
Commercialisation of robot delivery services is expected

#### COMPETITIVE LANDSCAPE

E-Land Eats Ltd leads with its family restaurant brand Ashley  
Independent foodservice operators enjoy growth

#### CATEGORY DATA

Table 28 - Full-Service Restaurants by Category: Units/Outlets 2020-2025  
Table 29 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025

Table 30 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025  
Table 31 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025  
Table 32 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025  
Table 33 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025  
Table 34 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025  
Table 35 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025  
Table 36 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030  
Table 37 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030  
Table 38 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030  
Table 39 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030  
Table 40 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030  
Table 41 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

## DISCLAIMER

## Limited-Service Restaurants in South Korea

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Cost pressures drive shift in operator strategies

#### INDUSTRY PERFORMANCE

Moderate growth in limited-service restaurants despite economic lows

Ice-cream limited-service restaurants enjoy growth

Brands reduce reliance on third-party delivery apps

#### WHAT'S NEXT?

Bright outlook for limited-service restaurants

Restaurant franchises expand menus to maximise revenue

Brands leverage AI to improve efficiency

#### COMPETITIVE LANDSCAPE

McDonald's Korea Corp achieves strong sales driven by its Taste of Korea menu

KFC Korea achieves record-breaking performance

Chained foodservice expands while independent restaurants are shrinking

#### CATEGORY DATA

Table 42 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025  
Table 43 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025  
Table 44 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025  
Table 45 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025  
Table 46 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025  
Table 47 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025  
Table 48 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025  
Table 49 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025  
Table 50 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030  
Table 51 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030  
Table 52 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030  
Table 53 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030  
Table 54 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030  
Table 55 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

## DISCLAIMER

## Self-Service Cafeterias in South Korea

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Modest growth in self-service cafeterias

#### INDUSTRY PERFORMANCE

Appeal of affordable Korean buffets pays dividends

Ikea Restaurants embraces discounting to attract shoppers

#### WHAT'S NEXT?

Korean buffets draw in millennials and Gen Z

Ikea Korea expands into urban-type stores

#### COMPETITIVE LANDSCAPE

Chained foodservice is led by Ikea Restaurant

#### CATEGORY DATA

Table 56 - Self-Service Cafeterias: Units/Outlets 2020-2025

Table 57 - Sales in Self-Service Cafeterias: Number of Transactions 2020-2025

Table 58 - Sales in Self-Service Cafeterias: Foodservice Value 2020-2025

Table 59 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2020-2025

Table 60 - Sales in Self-Service Cafeterias: % Transaction Growth 2020-2025

Table 61 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2020-2025

Table 62 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2025

Table 63 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2022-2025

Table 64 - Forecast Self-Service Cafeterias: Units/Outlets 2025-2030

Table 65 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2025-2030

Table 66 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2025-2030

Table 67 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2025-2030

Table 68 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2025-2030

Table 69 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2025-2030

#### DISCLAIMER

## Street Stalls/Kiosks in South Korea

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Moderate growth as consumer preferences evolve

#### INDUSTRY PERFORMANCE

Popularity of affordable street snacks drives growth

Increasing demand among foreign visitors

Changing diets negatively impact sales of tanghulu

#### WHAT'S NEXT?

Modest outlook for street stalls/kiosks

Convenience stores pose threat to street stalls/kiosks

Increasing reliance on kiosks is anticipated

#### COMPETITIVE LANDSCAPE

Myungrang Hot Dog loses traction as value positioning shifts

Unmanned bakeries boosts performance of other players  
Chained street stalls/kiosks leverage partnerships with food manufacturers

#### CATEGORY DATA

Table 70 - Street Stalls/Kiosks: Units/Outlets 2020-2025  
Table 71 - Sales in Street Stalls/Kiosks: Number of Transactions 2020-2025  
Table 72 - Sales in Street Stalls/Kiosks: Foodservice Value 2020-2025  
Table 73 - Street Stalls/Kiosks: % Units/Outlets Growth 2020-2025  
Table 74 - Sales in Street Stalls/Kiosks: % Transaction Growth 2020-2025  
Table 75 - Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2020-2025  
Table 76 - GBO Company Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2021-2025  
Table 77 - GBN Brand Shares in Chained Street Stalls/Kiosks: % Foodservice Value 2022-2025  
Table 78 - Forecast Street Stalls/Kiosks: Units/Outlets 2025-2030  
Table 79 - Forecast Sales in Street Stalls/Kiosks: Number of Transactions 2025-2030  
Table 80 - Forecast Sales in Street Stalls/Kiosks: Foodservice Value 2025-2030  
Table 81 - Forecast Street Stalls/Kiosks: % Units/Outlets Growth 2025-2030  
Table 82 - Forecast Sales in Street Stalls/Kiosks: % Transaction Growth 2025-2030  
Table 83 - Forecast Sales in Street Stalls/Kiosks: % Foodservice Value Growth 2025-2030

#### DISCLAIMER

### Consumer Foodservice By Location in South Korea

#### KEY DATA FINDINGS

##### 2025 DEVELOPMENTS

Retail developments and cost rationalisation emerge as key trends

#### INDUSTRY PERFORMANCE

Retail locations perform better than standalone locations  
Strategic expansion into retail and airport locations  
Players adopt compact store model as part of cost rationalisation

#### WHAT'S NEXT?

Luxury and fashion stores are emerging as new non-standalone consumer foodservice locations  
Standalone locations will remain important for marketing and branding purposes  
The rise of solo dining is reshaping restaurant operations  
Collaborations with convenience stores to target Gen Z/Alpha

#### CATEGORY DATA

Table 84 - Consumer Foodservice by Location: Units/Outlets 2020-2025  
Table 85 - Sales in Consumer Foodservice by Location: Number of Transactions 2020-2025  
Table 86 - Sales in Consumer Foodservice by Location: Foodservice Value 2020-2025  
Table 87 - Consumer Foodservice by Location: % Units/Outlets Growth 2020-2025  
Table 88 - Sales in Consumer Foodservice by Location: % Transaction Growth 2020-2025  
Table 89 - Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2020-2025  
Table 90 - Consumer Foodservice Through Standalone: Units/Outlets 2020-2025  
Table 91 - Sales in Consumer Foodservice Through Standalone: Number of Transactions 2020-2025  
Table 92 - Sales in Consumer Foodservice Through Standalone: Foodservice Value 2020-2025  
Table 93 - Consumer Foodservice Through Standalone: % Units/Outlets Growth 2020-2025  
Table 94 - Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2020-2025  
Table 95 - Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2020-2025  
Table 96 - Consumer Foodservice Through Leisure: Units/Outlets 2020-2025  
Table 97 - Sales in Consumer Foodservice Through Leisure: Number of Transactions 2020-2025

Table 98 - Sales in Consumer Foodservice Through Leisure: Foodservice Value 2020-2025

Table 99 - Consumer Foodservice Through Leisure: % Units/Outlets Growth 2020-2025

Table 100 - Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2020-2025

Table 101 - Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2020-2025

Table 102 - Consumer Foodservice Through Retail: Units/Outlets 2020-2025

Table 103 - Sales in Consumer Foodservice Through Retail: Number of Transactions 2020-2025

Table 104 - Sales in Consumer Foodservice Through Retail: Foodservice Value 2020-2025

Table 105 - Consumer Foodservice Through Retail: % Units/Outlets Growth 2020-2025

Table 106 - Sales in Consumer Foodservice Through Retail: % Transaction Growth 2020-2025

Table 107 - Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2020-2025

Table 108 - Consumer Foodservice Through Lodging: Units/Outlets 2020-2025

Table 109 - Sales in Consumer Foodservice Through Lodging: Number of Transactions 2020-2025

Table 110 - Sales in Consumer Foodservice Through Lodging: Foodservice Value 2020-2025

Table 111 - Consumer Foodservice Through Lodging: % Units/Outlets Growth 2020-2025

Table 112 - Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2020-2025

Table 113 - Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2020-2025

Table 114 - Consumer Foodservice Through Travel: Units/Outlets 2020-2025

Table 115 - Sales in Consumer Foodservice Through Travel: Number of Transactions 2020-2025

Table 116 - Sales in Consumer Foodservice Through Travel: Foodservice Value 2020-2025

Table 117 - Consumer Foodservice Through Travel: % Units/Outlets Growth 2020-2025

Table 118 - Sales in Consumer Foodservice Through Travel: % Transaction Growth 2020-2025

Table 119 - Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2020-2025

Table 120 - Forecast Consumer Foodservice by Location: Units/Outlets 2025-2030

Table 121 - Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2025-2030

Table 122 - Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2025-2030

Table 123 - Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2025-2030

Table 124 - Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2025-2030

Table 125 - Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2025-2030

Table 126 - Forecast Consumer Foodservice Through Standalone: Units/Outlets 2025-2030

Table 127 - Forecast Sales in Consumer Foodservice Through Standalone: Number of Transactions 2025-2030

Table 128 - Forecast Sales in Consumer Foodservice Through Standalone: Foodservice Value 2025-2030

Table 129 - Forecast Consumer Foodservice Through Standalone: % Units/Outlets Growth 2025-2030

Table 130 - Forecast Sales in Consumer Foodservice Through Standalone: % Transaction Growth 2025-2030

Table 131 - Forecast Sales in Consumer Foodservice Through Standalone: % Foodservice Value Growth 2025-2030

Table 132 - Forecast Consumer Foodservice Through Leisure: Units/Outlets 2025-2030

Table 133 - Forecast Sales in Consumer Foodservice Through Leisure: Number of Transactions 2025-2030

Table 134 - Forecast Sales in Consumer Foodservice Through Leisure: Foodservice Value 2025-2030

Table 135 - Forecast Consumer Foodservice Through Leisure: % Units/Outlets Growth 2025-2030

Table 136 - Forecast Sales in Consumer Foodservice Through Leisure: % Transaction Growth 2025-2030

Table 137 - Forecast Sales in Consumer Foodservice Through Leisure: % Foodservice Value Growth 2025-2030

Table 138 - Forecast Consumer Foodservice Through Retail: Units/Outlets 2025-2030

Table 139 - Forecast Sales in Consumer Foodservice Through Retail: Number of Transactions 2025-2030

Table 140 - Forecast Sales in Consumer Foodservice Through Retail: Foodservice Value 2025-2030

Table 141 - Forecast Consumer Foodservice Through Retail: % Units/Outlets Growth 2025-2030

Table 142 - Forecast Sales in Consumer Foodservice Through Retail: % Transaction Growth 2025-2030

Table 143 - Forecast Sales in Consumer Foodservice Through Retail: % Foodservice Value Growth 2025-2030

Table 144 - Forecast Consumer Foodservice Through Lodging: Units/Outlets 2025-2030

Table 145 - Forecast Sales in Consumer Foodservice Through Lodging: Number of Transactions 2025-2030

Table 146 - Forecast Sales in Consumer Foodservice Through Lodging: Foodservice Value 2025-2030

Table 147 - Forecast Consumer Foodservice Through Lodging: % Units/Outlets Growth 2025-2030

Table 148 - Forecast Sales in Consumer Foodservice Through Lodging: % Transaction Growth 2025-2030

Table 149 - Forecast Sales in Consumer Foodservice Through Lodging: % Foodservice Value Growth 2025-2030

Table 150 - Forecast Consumer Foodservice Through Travel: Units/Outlets 2025-2030

Table 151 - Forecast Sales in Consumer Foodservice Through Travel: Number of Transactions 2025-2030

Table 152 - Forecast Sales in Consumer Foodservice Through Travel: Foodservice Value 2025-2030

Table 153 - Forecast Consumer Foodservice Through Travel: % Units/Outlets Growth 2025-2030

Table 154 - Forecast Sales in Consumer Foodservice Through Travel: % Transaction Growth 2025-2030

Table 155 - Forecast Sales in Consumer Foodservice Through Travel: % Foodservice Value Growth 2025-2030

## DISCLAIMER

### 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/consumer-foodservice-in-south-korea/report](http://www.euromonitor.com/consumer-foodservice-in-south-korea/report).