

# Alcoholic Drinks in South Korea

June 2025

**Table of Contents** 

#### Alcoholic Drinks in South Korea

## **EXECUTIVE SUMMARY**

Alcoholic drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retail developments

On-trade vs off-trade split

What next for alcoholic drinks?

#### MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink-driving

Advertising

Smoking ban

Opening hours

On-trade establishments

## TAXATION AND DUTY LEVIES

#### OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

#### KEY NEW PRODUCT LAUNCHES

Outlook

#### MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2019-2024

# MARKET DATA

- Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2019-2024
- Table 3 Sales of Alcoholic Drinks by Category: Total Value 2019-2024
- Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024
- Table 5 Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024
- Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2024
- Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2024
- Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2024
- Table 9 GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024
- Table 10 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024
- Table 11 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024
- Table 12 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029
- Table 13 Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029
- Table 14 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029
- Table 15 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

# DISCLAIMER

# SOURCES

Summary 1 - Research Sources

Beer in South Korea

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Domestic lager benefits from recent launches and changing habits Lotte Chilsung Beverages sees exceptional growth Convenience retailers continues its rising share of sales of beer

#### PROSPECTS AND OPPORTUNITIES

Decline expected to be driven by health and economic factors

The falling share of on-trade sales likely to impact companies

Health likely to be a major theme in innovations moving forward

## CATEGORY BACKGROUND

Lager price band methodology

Summary 2 - Lager by Price Band 2024

## **CATEGORY DATA**

Table 16 - Sales of Beer by Category: Total Volume 2019-2024

Table 17 - Sales of Beer by Category: Total Value 2019-2024

Table 18 - Sales of Beer by Category: % Total Volume Growth 2019-2024

Table 19 - Sales of Beer by Category: % Total Value Growth 2019-2024

Table 20 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024

Table 21 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024

Table 22 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 23 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024

Table 24 - Sales of Beer by Craft vs Standard 2019-2024

Table 25 - GBO Company Shares of Beer: % Total Volume 2020-2024

Table 26 - NBO Company Shares of Beer: % Total Volume 2020-2024

Table 27 - LBN Brand Shares of Beer: % Total Volume 2021-2024

Table 28 - Forecast Sales of Beer by Category: Total Volume 2024-2029

Table 29 - Forecast Sales of Beer by Category: Total Value 2024-2029

Table 30 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029

Table 31 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

# Rtds in South Korea

# **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Spirit-based RTDs drives sales and growth due to popularity of highballs Brewguru Co Ltd sees exceptional growth to become the dominant company Popularity of off-trade consumption reduces share of on-trade sales

# PROSPECTS AND OPPORTUNITIES

Convenience and flavour likely to be key factors driving growth for RTDs

Transparent packaging set to gain traction, as it makes RTDs highly Instagrammable

Clearer categorisation of RTDs will help consumers make more informed choices

# CATEGORY DATA

Table 32 - Sales of RTDs by Category: Total Volume 2019-2024

Table 33 - Sales of RTDs by Category: Total Value 2019-2024

Table 34 - Sales of RTDs by Category: % Total Volume Growth 2019-2024

Table 35 - Sales of RTDs by Category: % Total Value Growth 2019-2024

Table 36 - Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024

- Table 37 Sales of RTDs by Off-trade vs On-trade: Value 2019-2024
- Table 38 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 39 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 40 GBO Company Shares of RTDs: % Total Volume 2020-2024
- Table 41 NBO Company Shares of RTDs: % Total Volume 2020-2024
- Table 42 LBN Brand Shares of RTDs: % Total Volume 2021-2024
- Table 43 Forecast Sales of RTDs by Category: Total Volume 2024-2029
- Table 44 Forecast Sales of RTDs by Category: Total Value 2024-2029
- Table 45 Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029
- Table 46 Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

# Spirits in South Korea

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Whiskies and shochu/soju continue to drive growth in spirits

Hite Jinro extends its lead due to its dominance of shochu/soju

Hypermarkets and convenience stores grow their shares of off-trade sales

# PROSPECTS AND OPPORTUNITIES

Despite overall declining trend, on-trade channel set to maintain growth

Tax reduction set to provide opportunities for traditional spirits

Innovation likely in traditional spirits

## CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 3 - Benchmark Brands 2024

#### **CATEGORY DATA**

- Table 47 Sales of Spirits by Category: Total Volume 2019-2024
- Table 48 Sales of Spirits by Category: Total Value 2019-2024
- Table 49 Sales of Spirits by Category: % Total Volume Growth 2019-2024
- Table 50 Sales of Spirits by Category: % Total Value Growth 2019-2024
- Table 51 Sales of Spirits by Off-trade vs On-trade: Volume 2019-2024
- Table 52 Sales of Spirits by Off-trade vs On-trade: Value 2019-2024
- Table 53 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 54 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 55 Sales of Dark Rum by Price Platform: % Total Volume 2019-2024
- Table 56 Sales of White Rum by Price Platform: % Total Volume 2019-2024
- Table 57 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2019-2024
- Table 58 Sales of English Gin by Price Platform: % Total Volume 2019-2024
- Table 59 Sales of Vodka by Price Platform: % Total Volume 2019-2024
- Table 60 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2019-2024
- Table 61 GBO Company Shares of Spirits: % Total Volume 2020-2024
- Table 62 NBO Company Shares of Spirits: % Total Volume 2020-2024
- Table 63 LBN Brand Shares of Spirits: % Total Volume 2021-2024
- Table 64 Forecast Sales of Spirits by Category: Total Volume 2024-2029
- Table 65 Forecast Sales of Spirits by Category: Total Value 2024-2029
- Table 66 Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029
- Table 67 Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

# Wine in South Korea

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Consumers move away from wine due to price sensitivity and changing trends

Despite decline, trading up seen within wine

Share of on-trade sales rises, while hypermarkets continues to dominate off-trade sales

#### PROSPECTS AND OPPORTUNITIES

Champagne and sake set to buck the declining trend

Likelihood of more casual consumption

Al set to have a greater impact on wine in the forecast period

# **CATEGORY DATA**

- Table 68 Sales of Wine by Category: Total Volume 2019-2024
- Table 69 Sales of Wine by Category: Total Value 2019-2024
- Table 70 Sales of Wine by Category: % Total Volume Growth 2019-2024
- Table 71 Sales of Wine by Category: % Total Value Growth 2019-2024
- Table 72 Sales of Wine by Off-trade vs On-trade: Volume 2019-2024
- Table 73 Sales of Wine by Off-trade vs On-trade: Value 2019-2024
- Table 74 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 75 Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 76 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 77 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 78 Sales of Still White Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 79 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 80 GBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024
- Table 81 NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024
- Table 82 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024
- Table 83 GBO Company Shares of Champagne: % Total Volume 2020-2024
- Table 84 NBO Company Shares of Champagne: % Total Volume 2020-2024
- Table 85 LBN Brand Shares of Champagne: % Total Volume 2021-2024
- Table 86 GBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024
- Table 87 NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024
- Table 88 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024
- Table 89 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024
- Table 90 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024
- Table 91 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024
- Table 92 GBO Company Shares of Non-grape Wine: % Total Volume 2020-2024
- Table 93 NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024
- Table 94 LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024
- Table 95 Forecast Sales of Wine by Category: Total Volume 2024-2029
- Table 96 Forecast Sales of Wine by Category: Total Value 2024-2029
- Table 97 Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029
- Table 98 Forecast Sales of Wine by Category: % Total Value Growth 2024-2029

# 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/alcoholic-drinks-in-south-korea/report.