



**Euromonitor
International**

Sports Drinks in South Korea

November 2025

Table of Contents

Sports Drinks in South Korea - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth for sports drinks due to fitness trends and heatwaves

INDUSTRY PERFORMANCE

Robust growth for sports drinks in South Korea amidst evolving fitness trends

The challenge of balancing functionality and health in sports drinks

WHAT'S NEXT?

Tapping new demographics in sports drinks likely to contribute to growth

Blurring of categories, but innovation and collaborations set to drive growth

The rise of sugar-free and natural formulations in sports drinks

COMPETITIVE LANDSCAPE

Pocari Sweat's share challenged by competition from companies and other formats

Lotte Group's new 2% DBH launch adapts to health-focused consumers

CHANNELS

Convenience stores cements its leadership in sports drinks due to on-the-go demand

Digital channels reshape South Korea's sports drinks distribution landscape

CATEGORY DATA

Table 1 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 2 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 3 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 4 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 6 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 7 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 8 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 9 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 10 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 11 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 12 - Forecast Off-trade Sales of Sports Drinks: % 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 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 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 by Category: Value 2025

Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in South Korea

COUNTRY REPORTS DISCLAIMER

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/sports-drinks-in-south-korea/report.