



Carbonates in South Korea

November 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Health, innovation, and shifting dynamics in carbonates

INDUSTRY PERFORMANCE

South Korea's "slow ageing" trend fuels growth for reduced sugar carbonates
Flavour innovation seen alongside zero calorie expansion in carbonates

WHAT'S NEXT?

Taste and health concerns expected to shape carbonates in South Korea
Lotte Chilsung aims to ensure transparency, inclusivity and trust through Food QR
Paldo's Pororo Tok achieves certification for its children's carbonates

COMPETITIVE LANDSCAPE

Lotte Chilsung's strategic diversification narrows gap with Coca-Cola
Flavour innovation from Hite Jinro helps drive growth for tonic water in South Korea

CHANNELS

Convenience stores extends its lead in carbonates in 2025
Coca-Cola's 'Red Ribbon' campaign elevates foodservice engagement

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EXECUTIVE SUMMARY

Health trends and channel shifts are reshaping soft drinks

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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

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Retail e-commerce platforms are driving efficiency and value in soft drinks
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