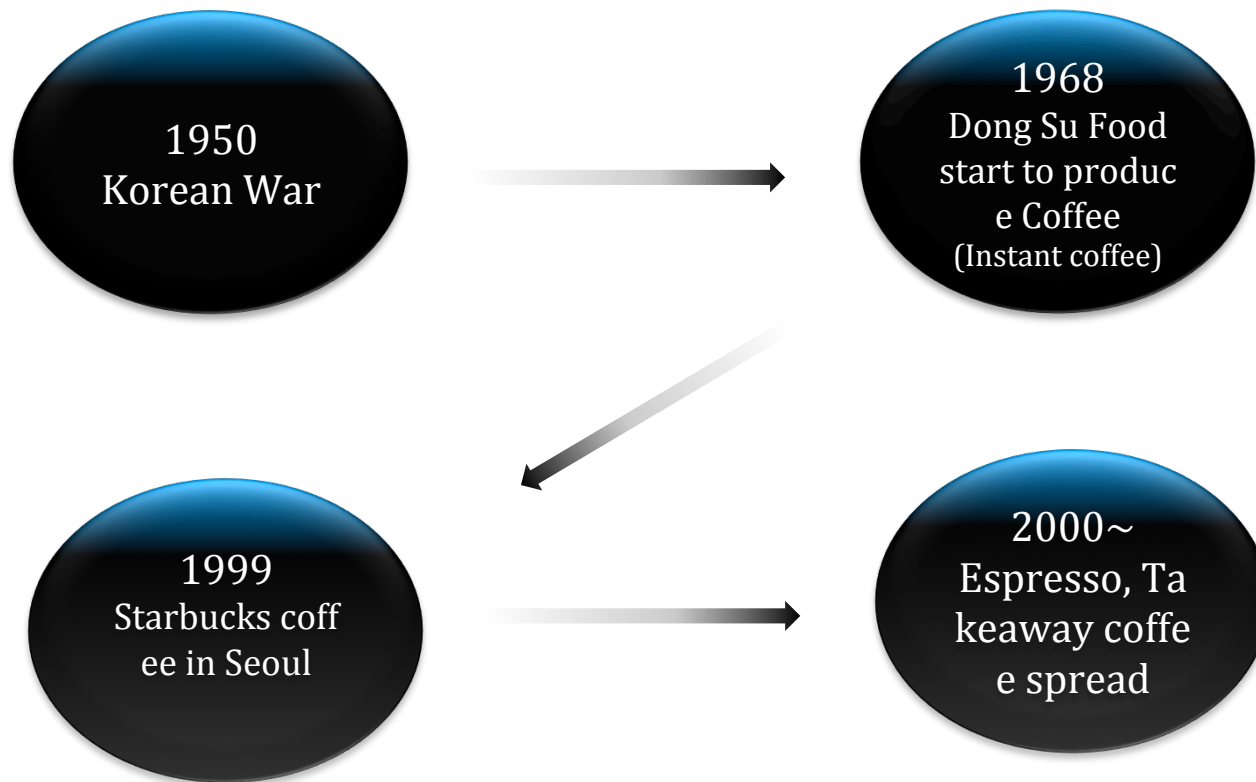


# **Korea Coffee Market**

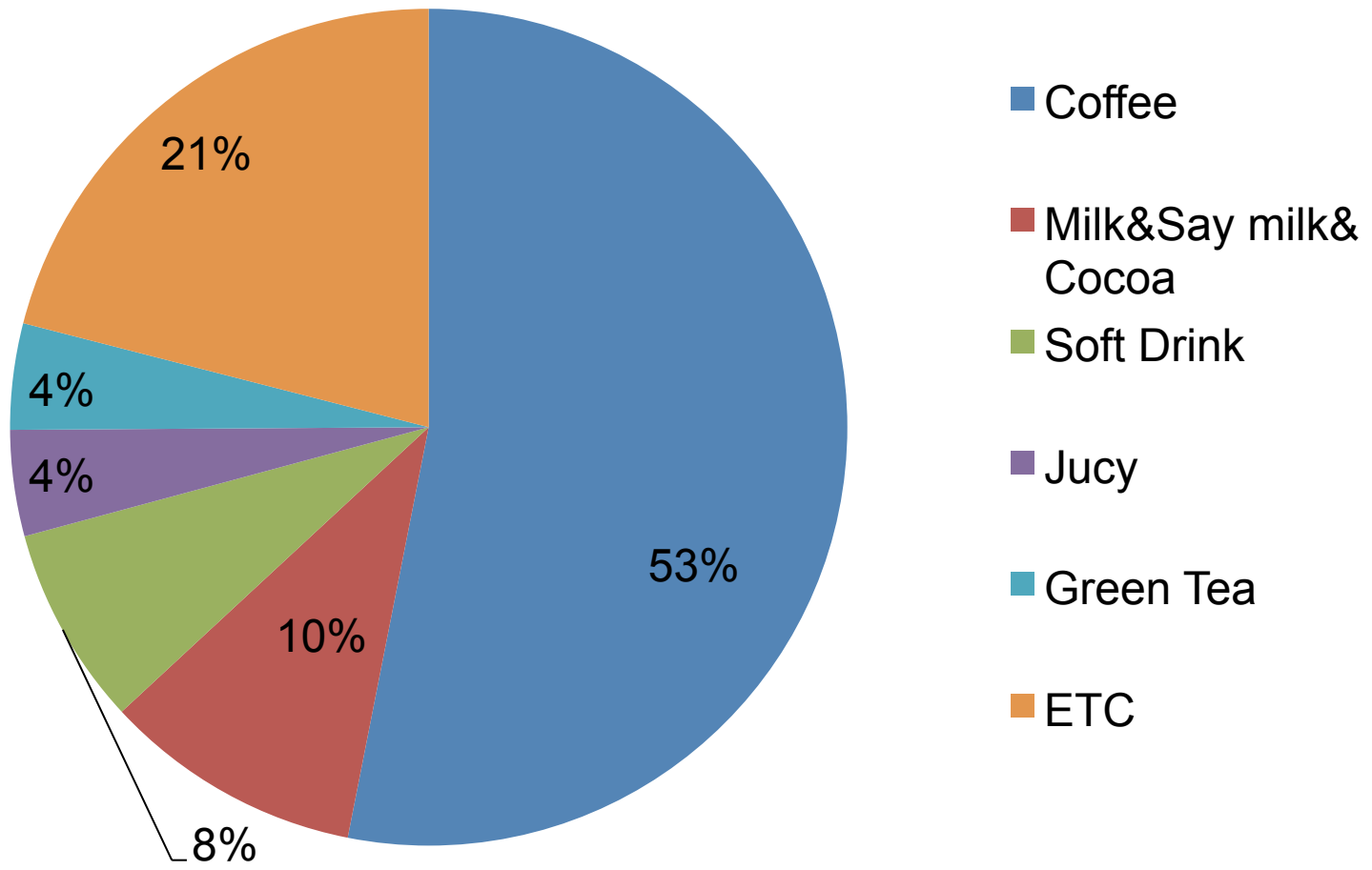
**TERAROSA Coffee**

**YUNSON, LEE**

# The evolution of coffee industry in south Korea

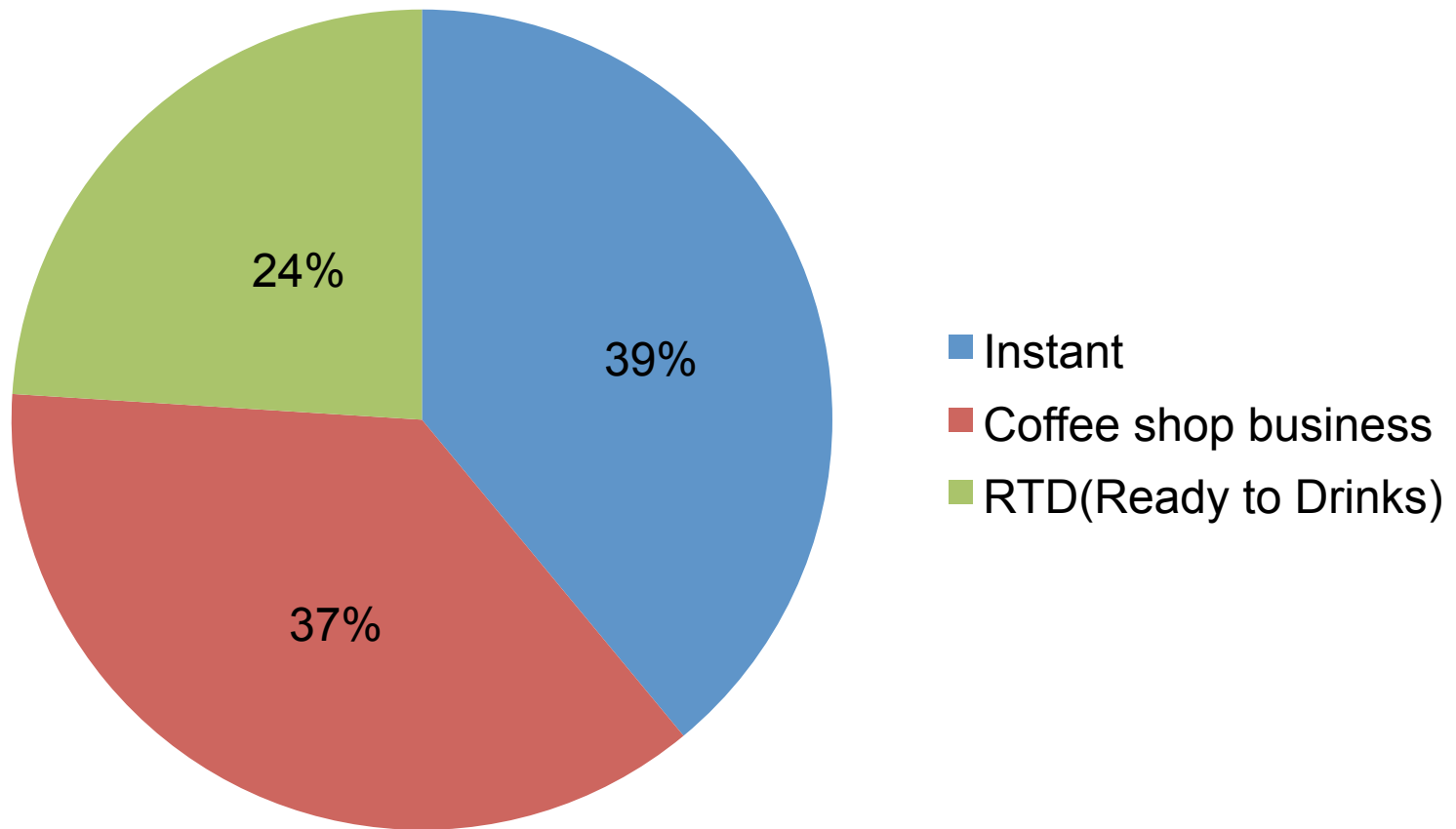


# Coffee among the Korea Drink Market

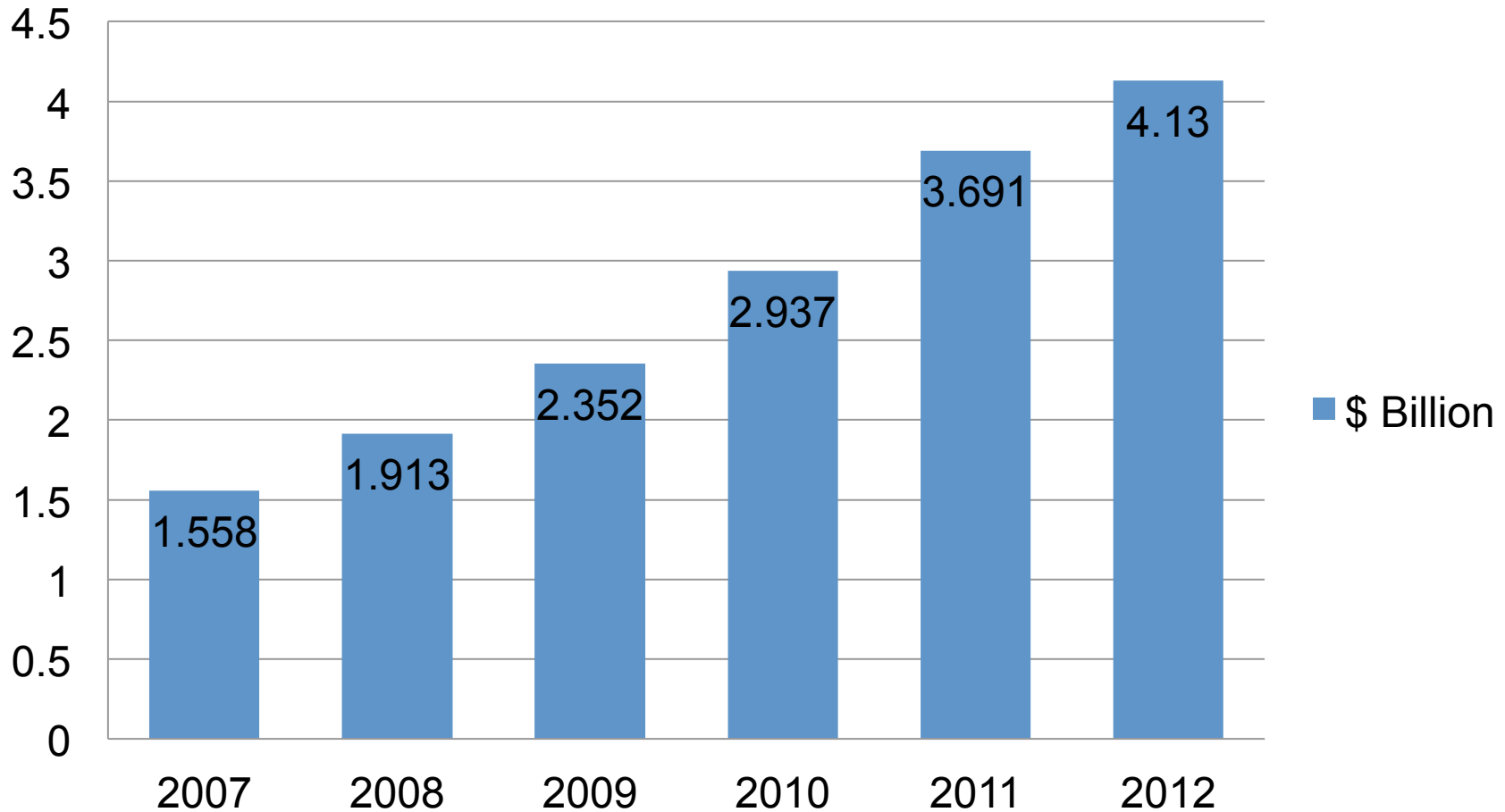


# Korea coffee market

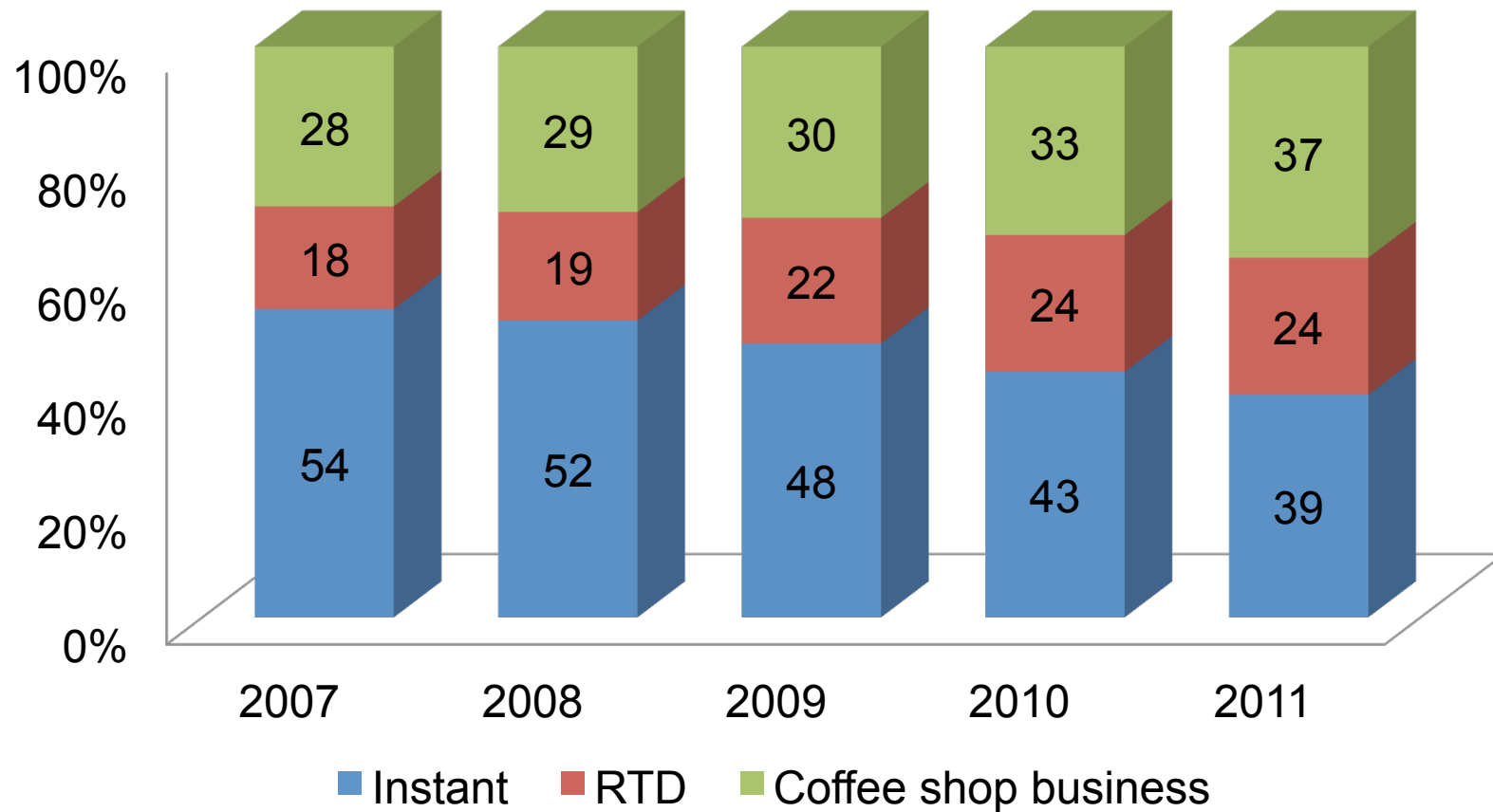
Total: \$4.130 Billion (from Nielsen Korea/2012)



# 2007-2012 Korea coffee market (265% Growing)



# Korea coffee Market Portion



# Number of Coffee shops in South Korea

	2006	2013
Total Number of Coffee shops	1,600	15,000
5 Major brand Number of Coffee shops	1,500	2,700

# Numbers of Major brand Coffee shops in South Korea<sub>(2012)</sub>

<b>Major brand</b>	<b>Numbers</b>	<b>Sales (M\$)</b>	<b>Profit (M\$)</b>
Starbucks(US)	554	369	23
Café Bene(Domestic)	811	199	9
Coffee Bean(US)	244	130	4
TOM&TOMS(Domestic)	360	59	6
Hollys(Domestic)	396	54	5



What kinds of coffee...  
Best Selling: Americano-Espresso+ Hot water  
Using Blend Coffee



# What kinds of coffee...

## 2. Hand Drip-single origin

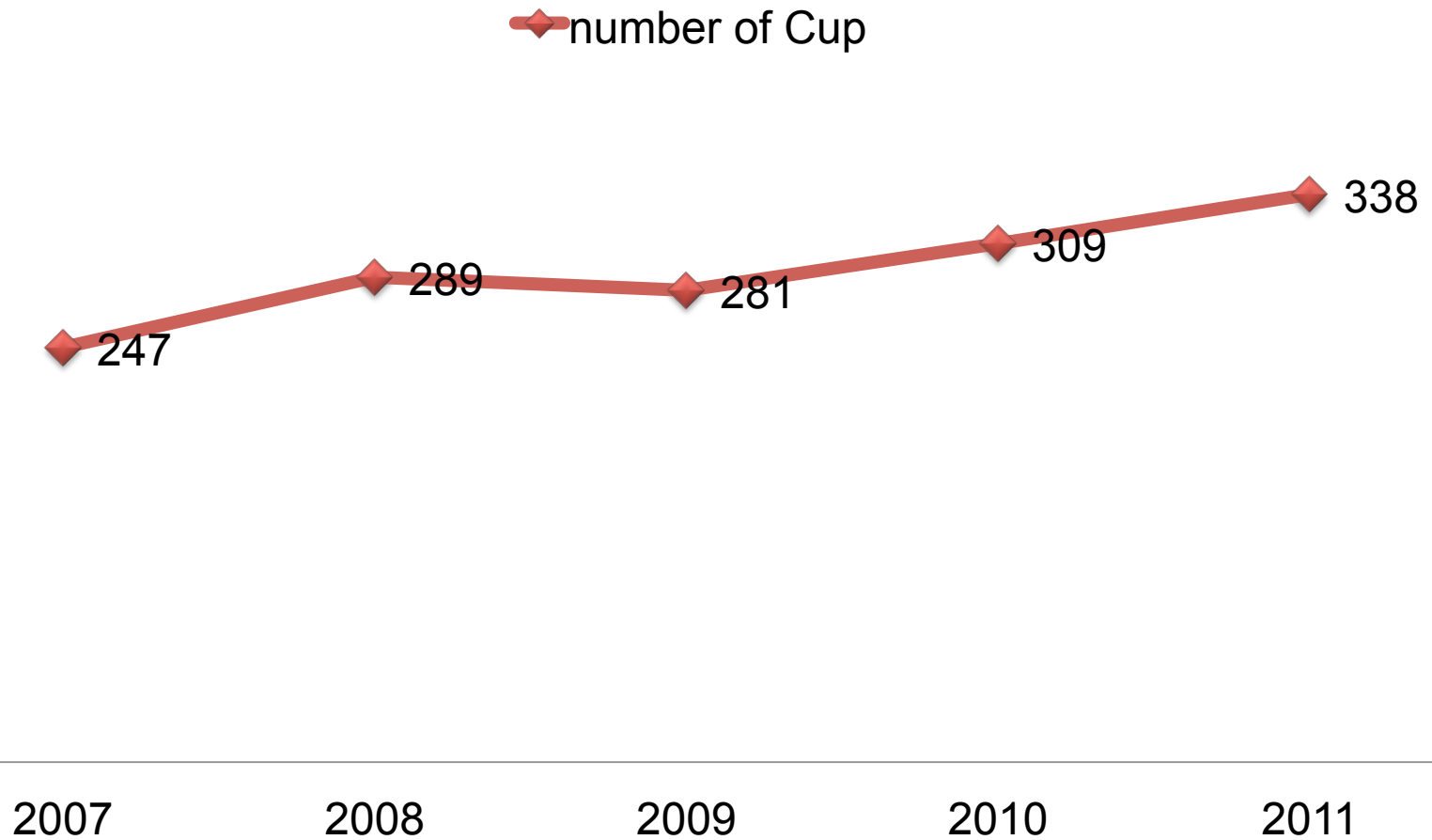


# Coffee price in Korea

- One cup of Americano as average: \$4
- Coffee price \$1.5-\$7
- Most expensive : Around \$30  
(per cup/at the hotel)

# From 2007 to 2011

(10g per cup & over 20 years old only)



# Number of Cups (per Capital & per year)

2000	2013(55% Growing)
313	484

# Korea Coffee importing

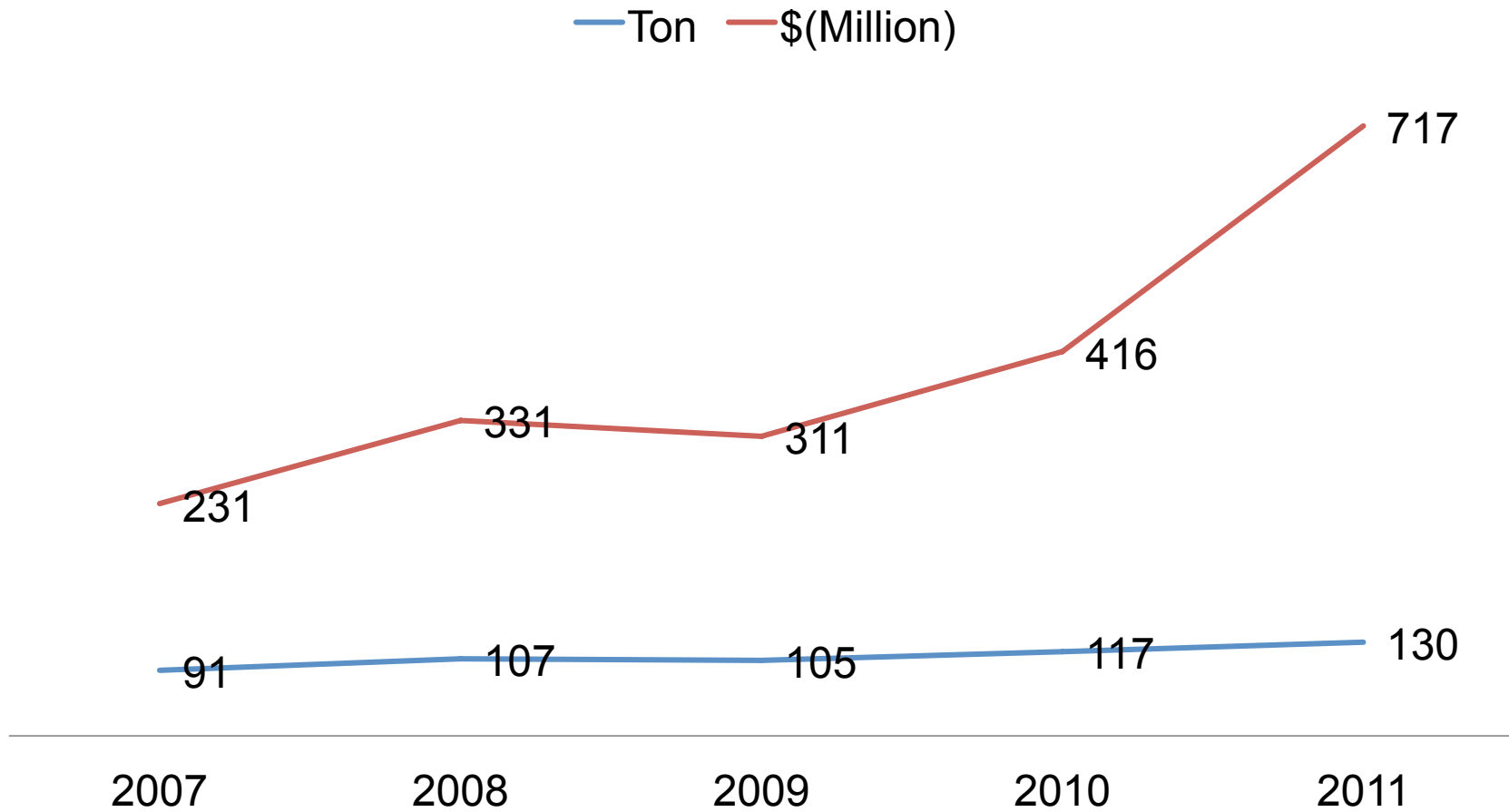
**(2011, from Korea custom)**

- Total: 130,000(t)  
-(green bean, a crude article, roasted bean )
- \$ 717million
- Quantities: 44% up(Comparing to 2007)
- Total Payment:211% up(comparing to 2007)
- Total coffee market growth: 3times.

# Market Change(2007-2011)

- A Crude Article: 3.9%→ 6.5%
- Roasted Coffee: 2.8%→4.2%
- Green Bean: 93.8%→89.3%

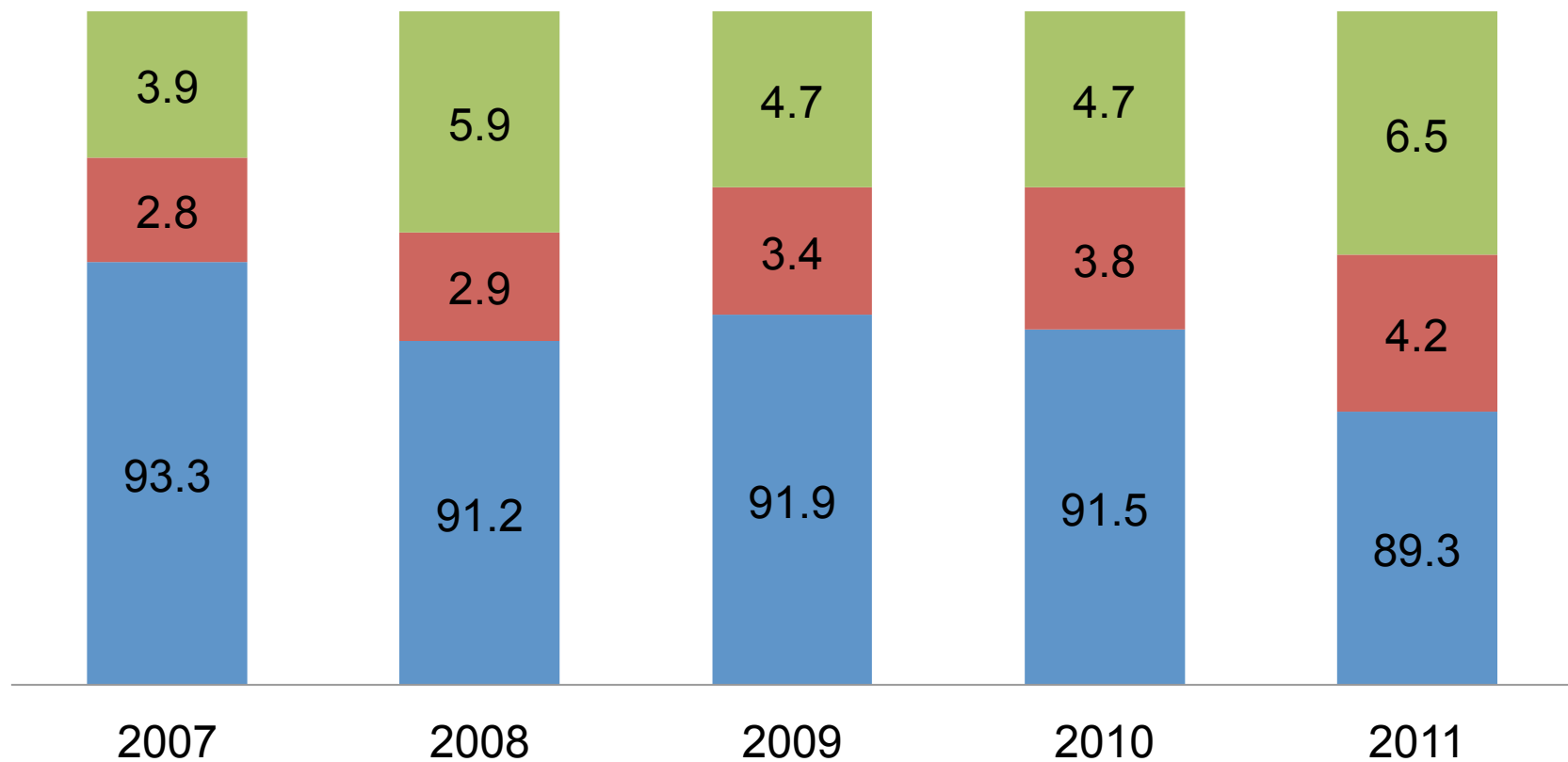
# Coffee importing



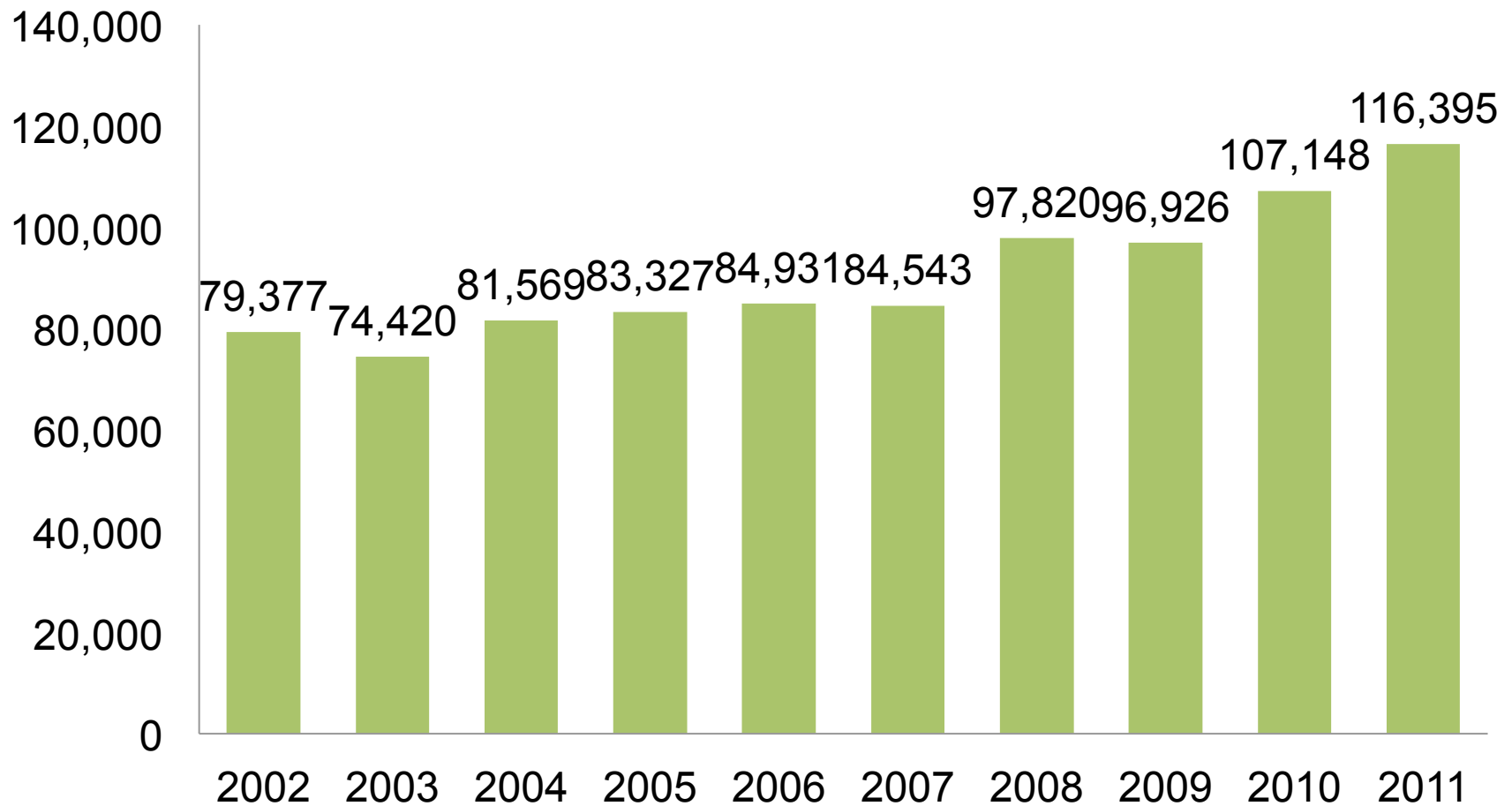


# Change of Coffee importing(%)

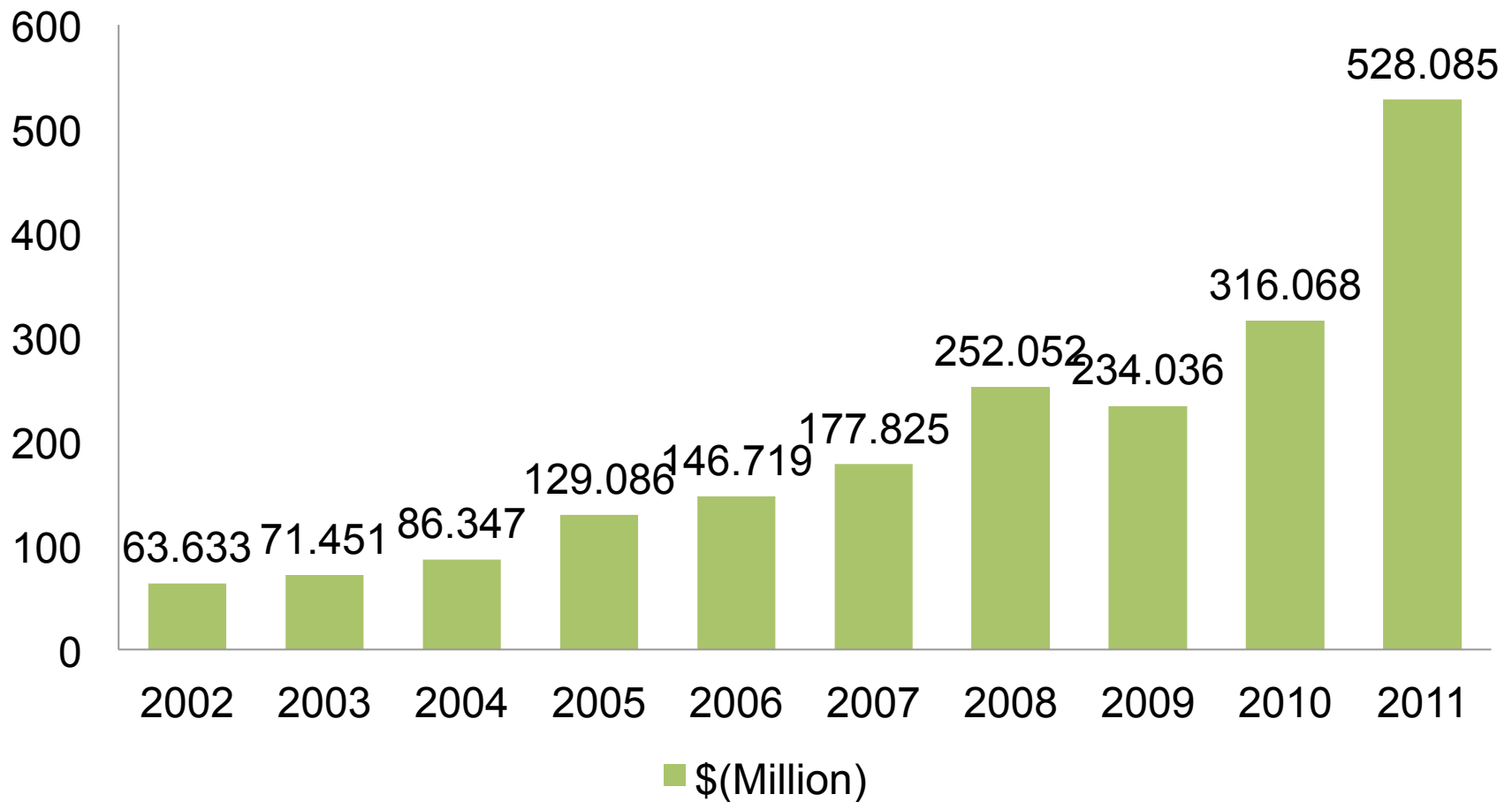
■ Green bean ■ Roasted bean ■ Crude Article



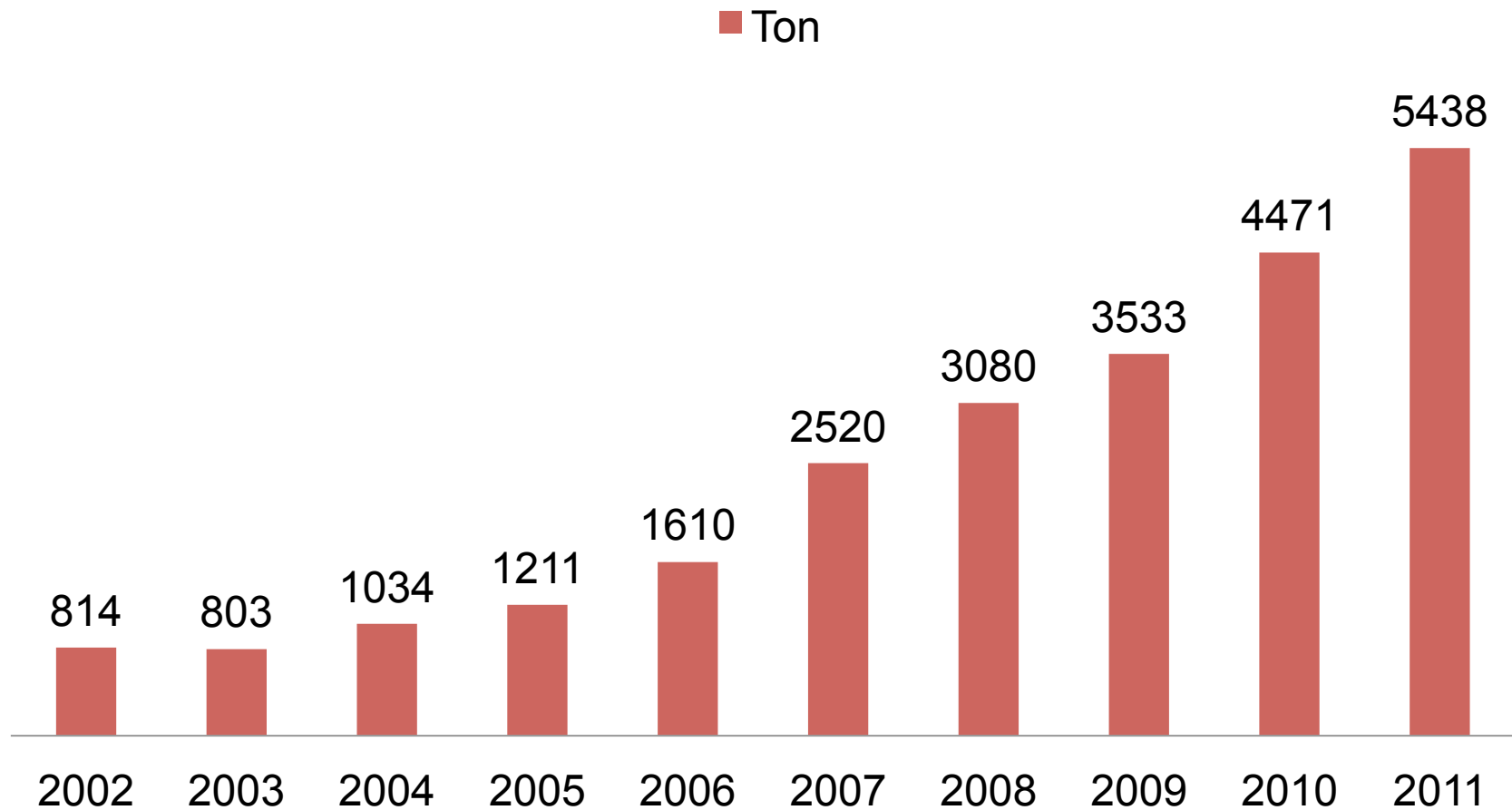
# Importing of green bean(Ton)



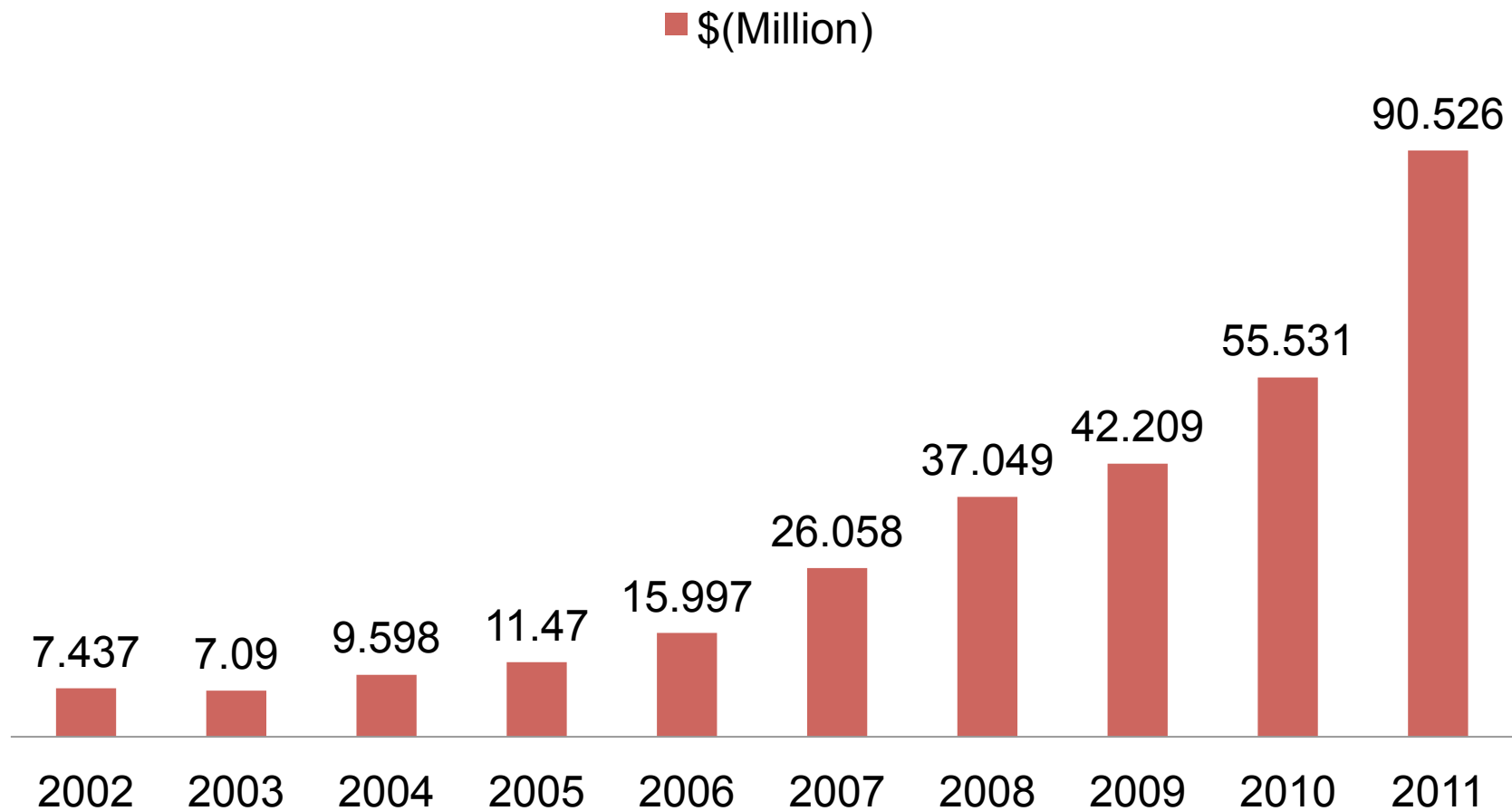
# Importing of green bean(\$:Million)



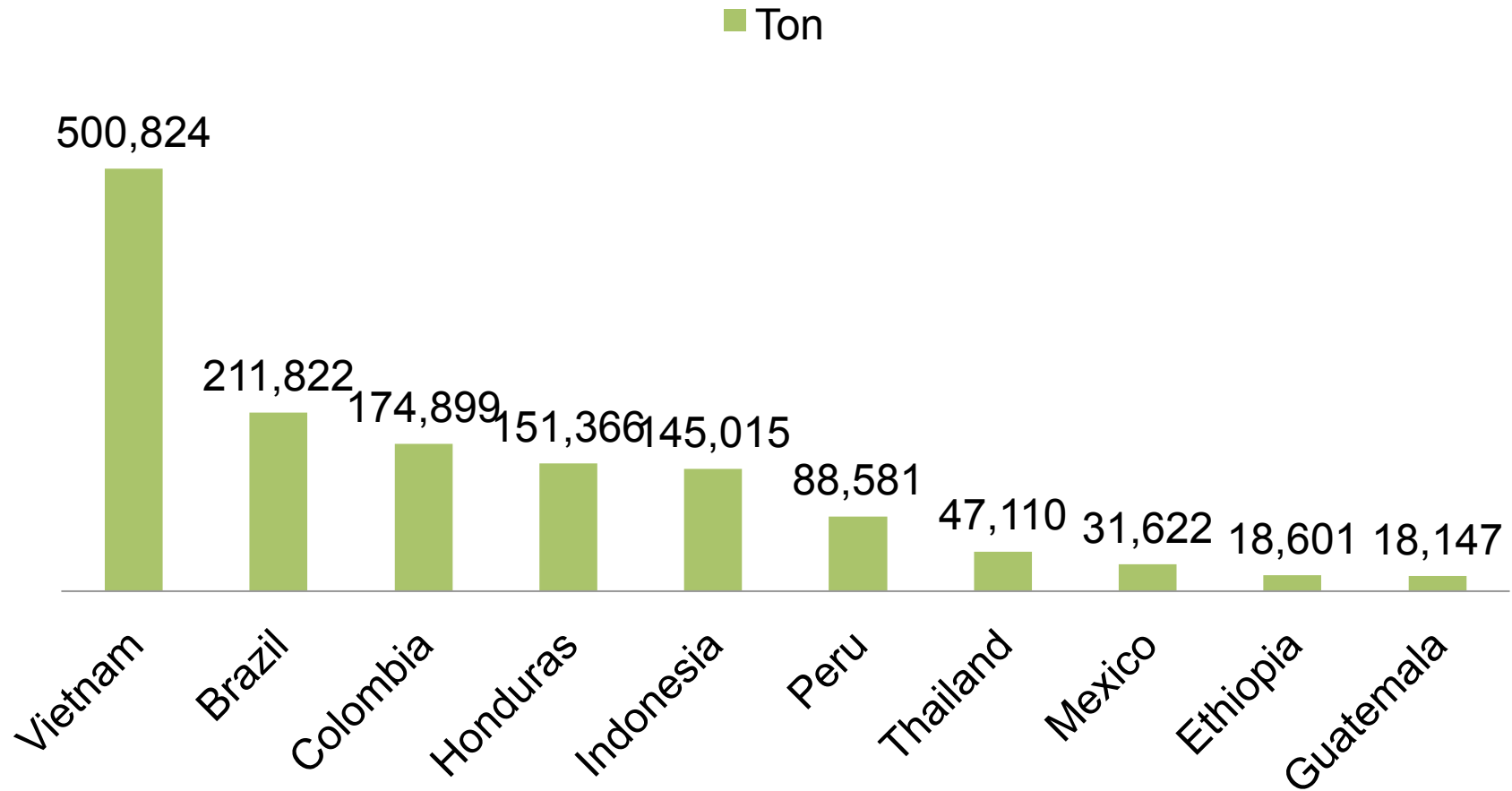
# Roasted bean importing(ton)



# Roasted bean importing(\$:Million)

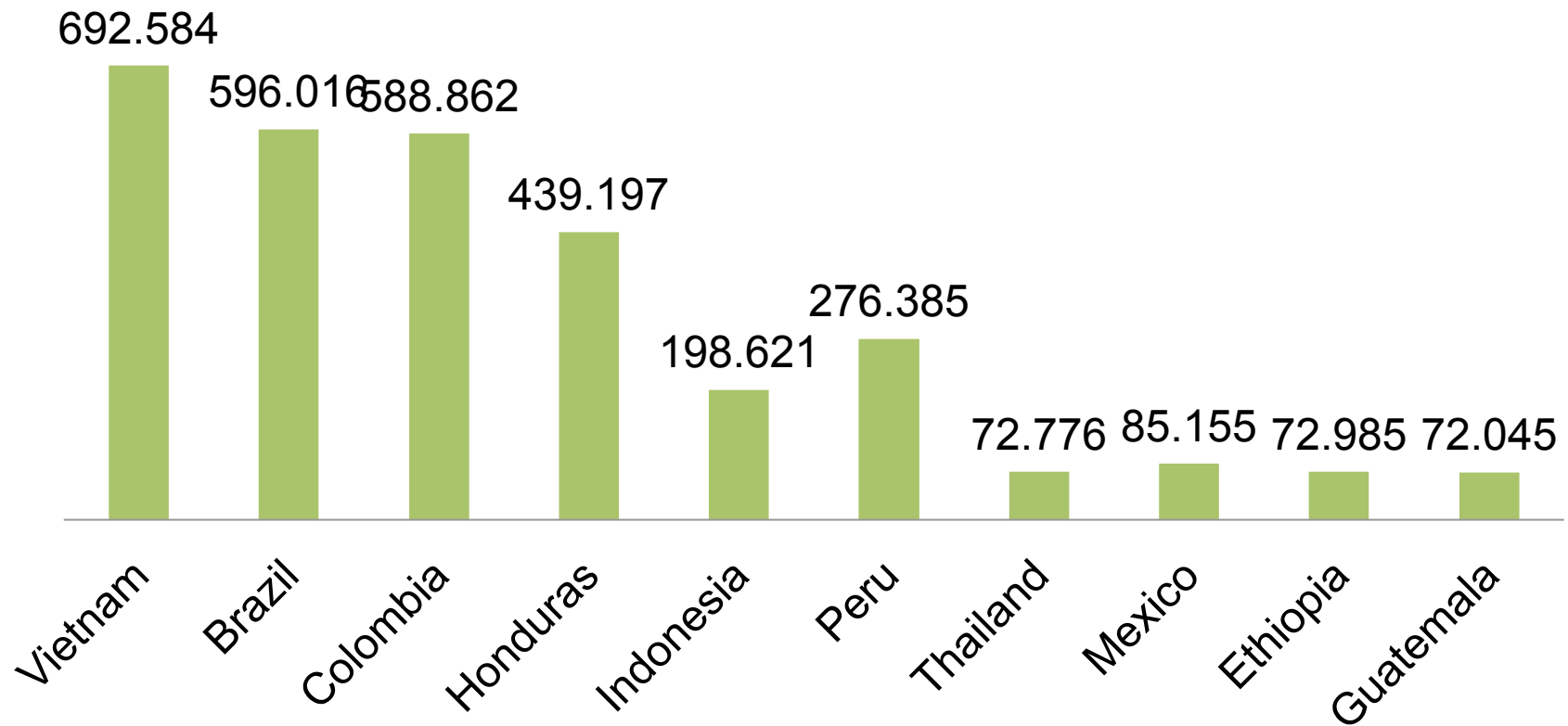


# Top 10 Countries of green bean importing (T/1995-2012)

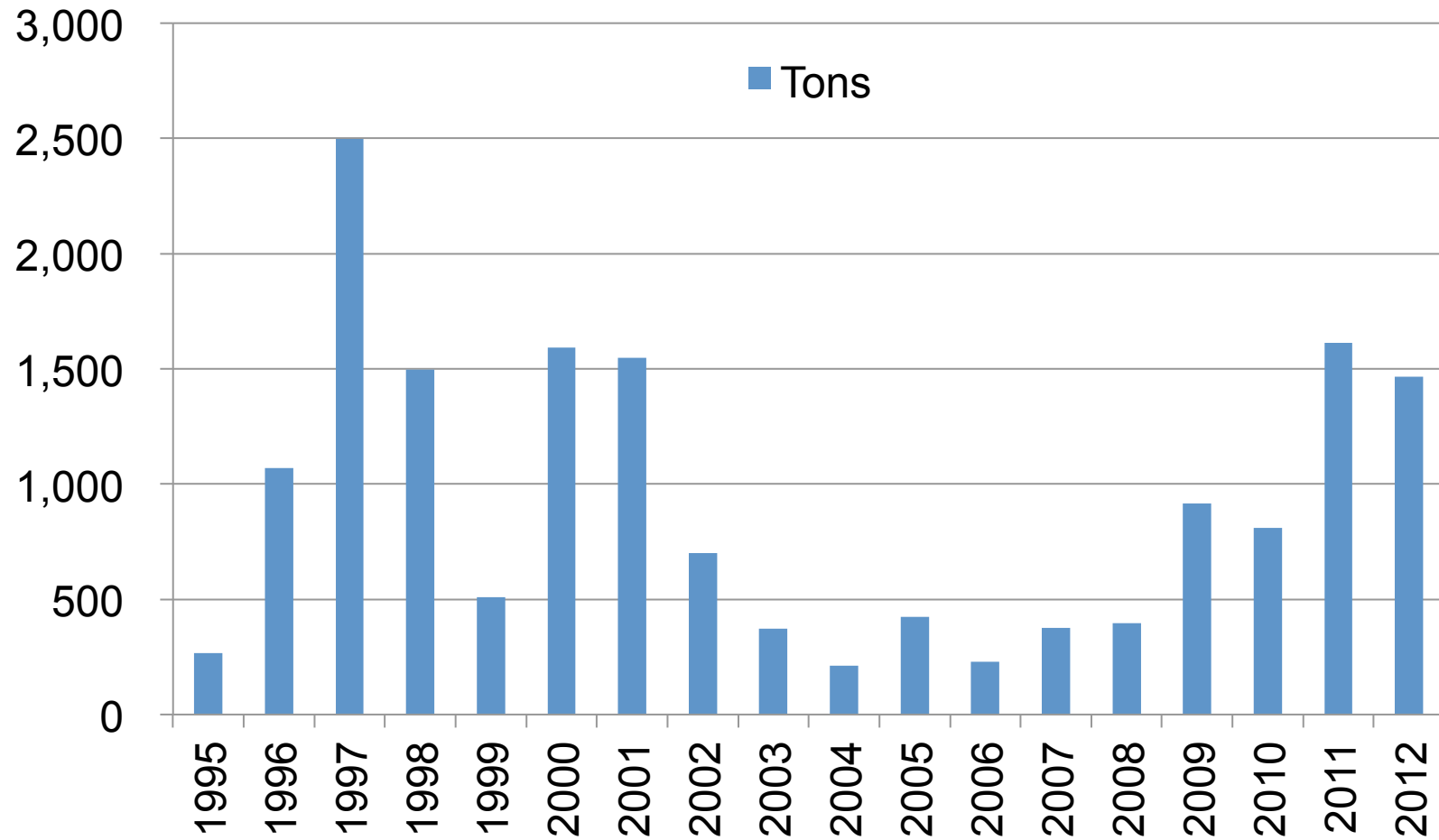


# Top 10 Countries of green bean importing (\$ Million 1995-2012)

■ \$(million)

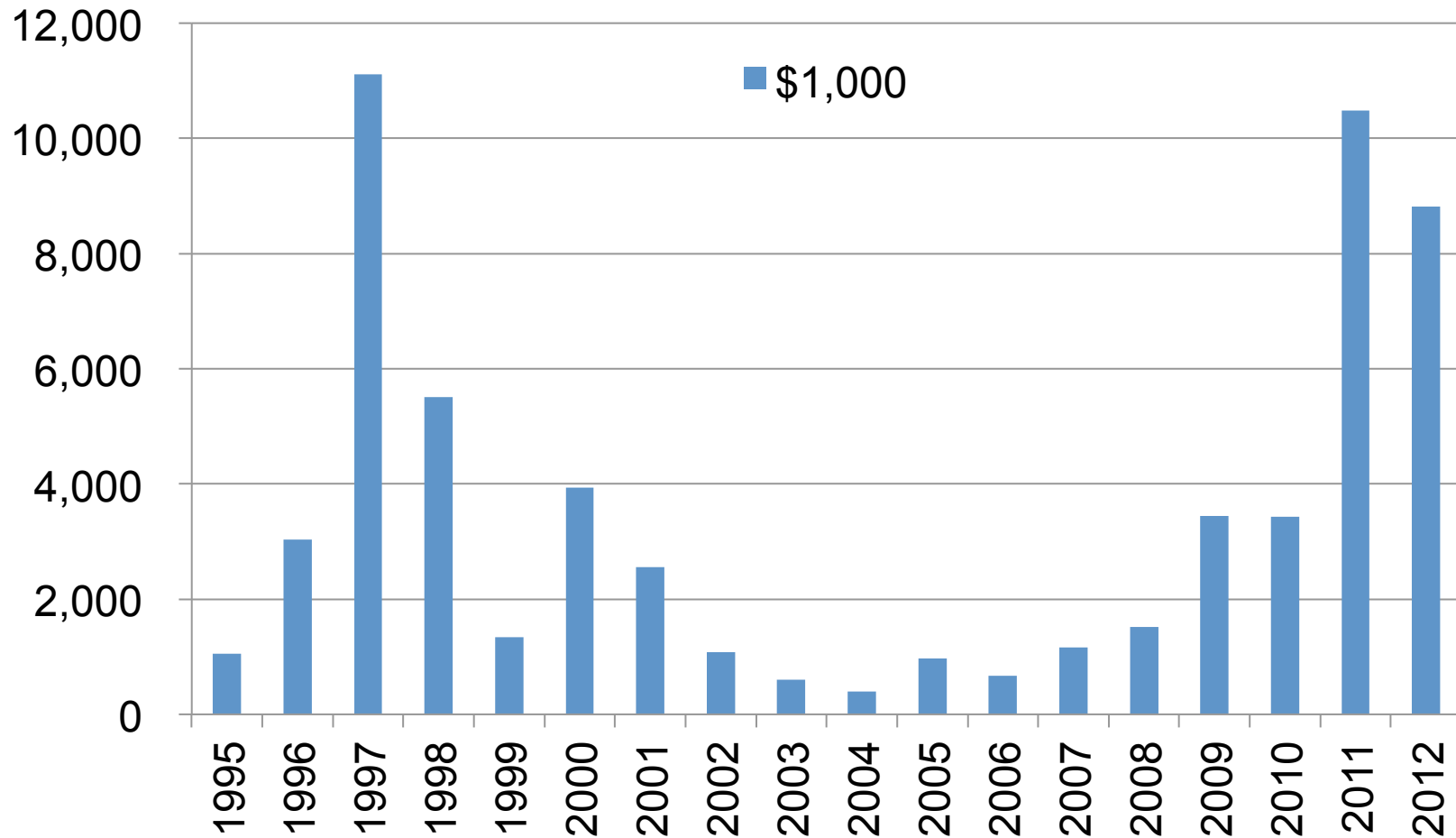


# Changes in Costa Rican beans export to South Korea

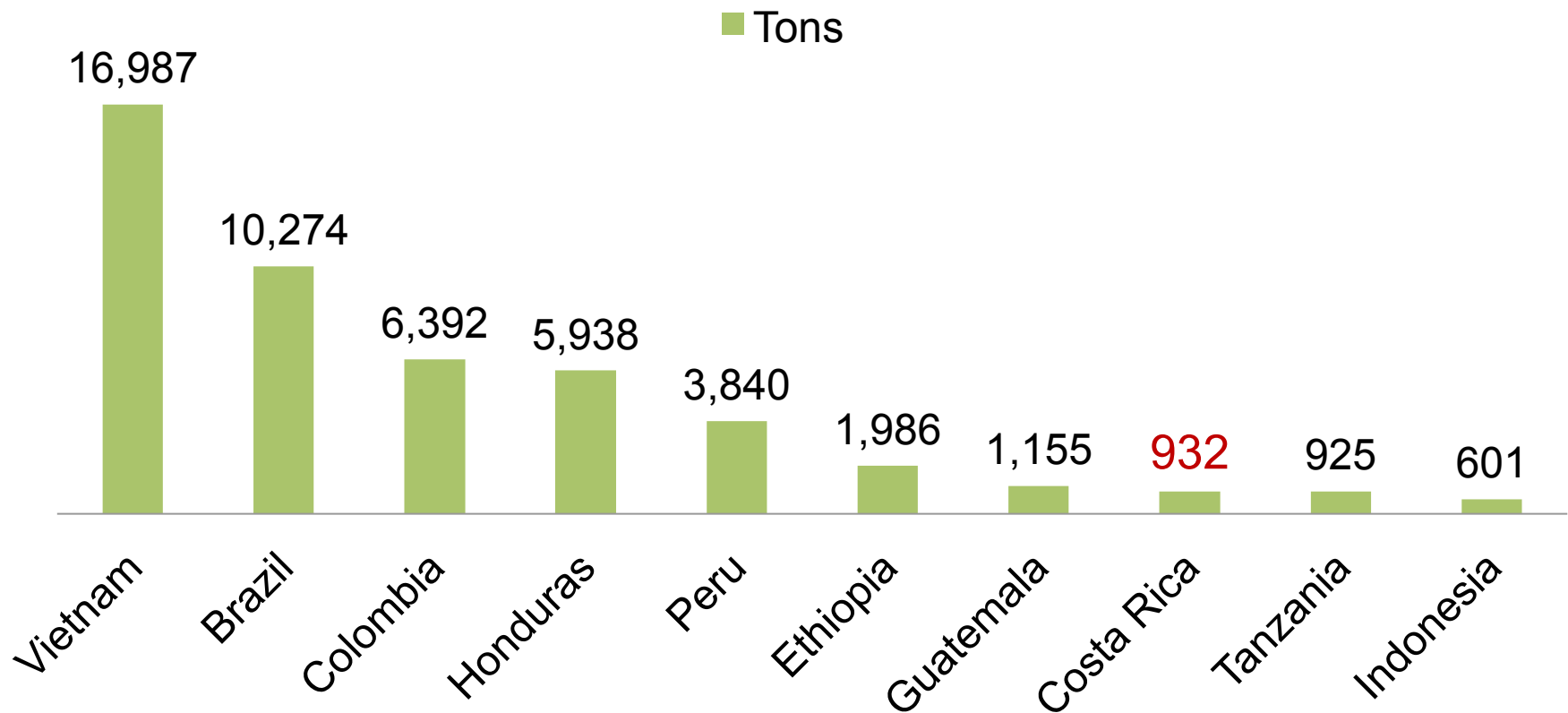




# Changes in Costa Rican beans export to South Korea



# Top 10 Export Countries of Green beans to South Korea (2013 First half)



# Image of Cost-Rica coffee in Korea

- Very Well Known Name for the Public
- Expensive coffee for Commercial section
- Nothing new or special for Specialty Section

# New stream in Korea

- Move from Instant to fresh roasted coffee
- Begin to think of coffee quality
- Want to know traceability and social responsibility