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Key Findings from the 2025 Survey on the Overseas Expansion of Korean Food Service Companies

Sejong, 6 February 2026 — Korean food service brands are expanding their global footprint on the back of the Korean Wave (Hallyu). Going beyond simple market entry, they are achieving tangible sales growth and increasing the number of overseas outlets, thereby reinforcing the global standing of K-Food.

According to the 2025 Survey on the Overseas Expansion of Korean Food Service Companies, released by the Ministry of Agriculture, Food and Rural Affairs (MAFRA) and the Korea Agro-Fisheries & Food Trade Corporation (aT), Korean food service companies expanded into 56 countries worldwide and had a total of 4,644 outlets in operation as of December 2025.

The survey indicates that Korean food service companies have achieved both quantitative and qualitative growth in their overseas expansion. In particular, companies reporting increased overseas sales over the past year showed a clear upward growth trend.

Over the past five years, the number of Korean food service companies operating overseas decreased from 134 to 122 and the number of Korean food service brands operating overseas declined from 147 to 139. However, the number of countries they entered increased from 48 to 56. Also, the total number of overseas outlets operated by Korean food service companies rose from 3,722 in 2020 to 4,644 in 2025, representing growth of approximately 24.8 per cent.

The largest share of overseas outlets operated by Korean food service companies was located in the United States of America (23.8 per cent), followed by the People's Republic of China (17.9 per cent), the Socialist Republic of Vietnam (13.7 per cent), the Republic of the Philippines (6.3 per cent), and the Kingdom of Thailand (5.0 per cent).

Southeast Asian countries, such as Vietnam and the Philippines, have traditionally been strong markets and continued to account for a significant proportion (36.2 per cent). At the same time, expansion into North America (27.4 per cent), including the United States and Canada, as well as Europe, including the United Kingdom of Great Britain and Northern Ireland and France, has accelerated, highlighting these regions as emerging markets of opportunity.

One of the most notable findings of the survey is the shift in core markets.

China, which ranked first in 2020 with 1,368 Korean food service outlets, saw a significant decline to 830 outlets in 2025 due to intensified local competition. In contrast, the United States market more than doubled over the past five years, reaching 1,106 outlets and solidifying its position as a new strategic hub for the Korean food service industry.

Success in the United States was driven primarily by mega brands. BBQ and Bonchon Chicken led the global K-Chicken boom, while Paris Baguette and Tous les Jours established a nationwide “K-Bakery Belt” across the country.

In Japan, where the number of Korean food service outlets grew by more than 68 per cent, Korean food service has moved beyond a market centred on the Korean diaspora and has become a core cultural component of the so-called “fourth wave of Hallyu,” particularly among local Generation MZ (a term referring to millennials and Generation Z). Chicken and beverage (with Korean dessert beverages included) categories were identified as the main drivers behind the emergence of Japan as the tenth largest market.

The Vietnamese market maintained its strong position, with the number of Korean food service outlets increasing by 37.2 per cent compared to 2020. In particular, Lotteria and Dookki Tteokbokki have been recognised as successful examples of business diversification, firmly establishing new categories such as K-Burgers and K-Snack Food.

By business type (based on the Korean Standard Industrial Classification), chicken restaurants and bakeries remained the first and second largest categories among Korean food service brands operating overseas. Korean cuisine restaurants ranked third, followed by pizza, hamburger, and sandwich outlets in

the fourth place.

Chicken outlets (1,809 outlets) and bakeries (1,182 outlets) together accounted for approximately 64 per cent of all overseas outlets, demonstrating their role as the two main pillars of the global growth of the Korean food service industry. While the number of Korean cuisine restaurants (550 outlets) showed a gradual increase, their overall share declined slightly, and the number of overseas coffee shop outlets decreased as well.

Director-General Jeong Kyung-seok of the Food Industry Policy Bureau of the MAFRA said: “The overseas expansion of Korean food service companies is not merely about increasing the number of outlets; it is a crucial pillar in enhancing the competitiveness of Korean food culture and the broader food industry. We will continue to provide effective support that reflects the voices of the industry, thereby enabling the Korean food service industry to achieve sustainable growth in global markets.”