

AI Leads the Pack as Korea's New Industry Sectors Capture 76% of All Venture Investment in 2025

Korea's twelve designated new industry sectors attracted KRW 5.2 trillion (USD 3.47 billion) in venture investment in 2025, accounting for 76% of the country's total venture investment of KRW 6.8 trillion (USD 4.53 billion). The figures reflect a sustained investor preference for high-growth emerging sectors, which have consistently drawn around 80% of all venture capital over the past five years.

The twelve sectors are:

1. AI models and Infrastructure	2. Semiconductors	3. Mobility
4. Security, networking and quantum	5. Robotics	6. Healthcare
7. Life sciences and pharmaceuticals	8. Content	9. Defense, aerospace and maritime
10. Eco-friendly industries	11. Energy, nuclear and fusion power	12. Advanced manufacturing

Companies in new industry sectors also commanded significantly higher per-company investment – averaging KRW 3.39 billion (USD 2.26 million), nearly 1.7 times the KRW 1.91 billion (USD 1.27 million) average seen in other sectors.

AI at the Top, Life Sciences and Defense on the Rise

AI models and infrastructure claimed the largest share of new industry investment at KRW 1.3 trillion (USD 867 million), representing 19.6% of the total. Content (KRW 1.18 trillion / USD 787 million), healthcare (KRW 1.13 trillion / USD 753 million), and advanced manufacturing (KRW 970 billion / USD 647 million) also crossed the trillion-won threshold.

The sharpest year-on-year growth was recorded in life sciences and pharmaceuticals (+35.4%), defense, aerospace and maritime (+19.2%), and mobility (+16.5%). Energy, nuclear and fusion power saw the steepest decline (-55.2%), followed by advanced manufacturing (-22%) and semiconductors (-20.8%).

Follow-on Investment Dominates; Large Deals Skew Toward New Industries

Of the KRW 5.2 trillion (USD 3.47 billion) invested in new industry sectors, 87.7% went to follow-on rounds – reflecting investors' preference for backing companies already in their portfolios rather than making first-time bets. New investments accounted for the remaining 12.3%.

At the large-deal end of the market, 131 of 158 companies that raised KRW 10 billion (USD 6.657 million) or more were in new industry sectors – around 83%. All six companies that raised KRW 50 billion (USD 33.3 million) or more were in new industries, with two of those in AI.

Capital Remains Concentrated in the Capital Region

Seoul, Gyeonggi, and Incheon together accounted for KRW 4.1 trillion (USD 2.73 billion), or 79.1% of new industry venture investment. Seoul alone drew KRW 2.6 trillion (USD 1.73 billion), led by content sector investment. Outside the capital region, Daejeon attracted KRW 391.3 billion (USD 261 million) – driven largely by life sciences investment, with ADC platform developer TRIOAR among its standout recipients – while South Gyeongnam drew KRW 107.1 billion (USD 71.4 million), concentrated in defense and aerospace.

“We will continue to analyze the venture investment market from multiple angles and translate those insights into policies that support the real growth of startups and venture companies,” said Minister Han Seong-Sook. “Through initiatives like the Next-Generation Unicorn Development Project and the Regional Growth Fund – co-established with local governments – we will ensure that new industry companies have a stable foundation to grow from.”

Detailed analysis of 2025 venture investment trends will be published by the Korea Venture Capital Association in its Venture Investment Focus report from June onwards, and will also be available at the Venture Investment Portal (www.vcs.go.kr).

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