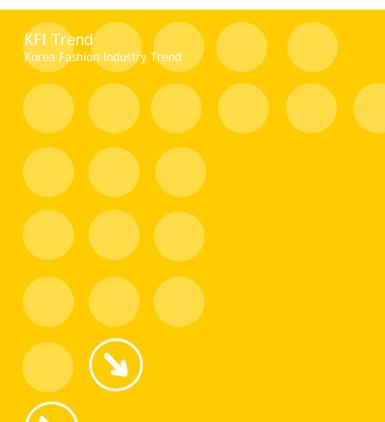


Korea Fashion Industry Index Research

2009 KFI research analysis & 2010 Market Forecasting

Korea Fashion Market Trend 2009



Introduction



1. KFI research System Korea Fashion Industry Index Research System

Tracking Research Trend Forecasting data

Fashion Market Environment Trend Information Research

Fashion Environment Trend

- Economic Environment
- Consumption Environment
- Social Culture Environment

Fashion Industry Trend

- Fashion Industry Value Chain
- Fashion Management
- Fashion Distribution

Consumer Purchase Patterns Trend

- Fashion Life Style Index
- Fashion Buying Factor Index
- Fashion Channel Index
- Fashion Origin Index

Global Fashion Market Perspective

- Global Fashion Industry Trend
- Global Fashion Company's Activity

Fashion Market Scale Trend Information Research

Men's Fashion Market Scale Trend

- * over 13 ages' women
- Spring/Summer Market Scale
- .Item, Age, Region's Scale
- Fall/Winter Market Scale (Exp)
 - .Item, Age, Region's Scale

Women's Fashion Market Scale Trend

- * over 13 ages' women
- Spring/Summer Market Scale
 - .Item, Age, Region's Scale
- Fall/Winter Market Scale (Exp)
 .Item, Age, Region's Scale

Children's Fashion Market Scale Trend

- * 0 ~ 12 ages' men & women
- Spring/Summer Market Scale
- .Item, Age, Region's Scale
- Fall/Winter Market Scal e(Exp)
- .Item, Age, Region's Scale

KFI TREND

Korea Fashion Industry Trend

2009

Consumer Purchase Patterns Trend Information Research

Fashion Consciousness Index

- Fashion Involvement Index
- Fashion Preferring Style Index
- Fashion Buying Factor Index
- Fashion Brand Selecting Factor Index

Fashion Buying Behavior Index

- Fashion Product Buying Index

Fashion Distribution Channel Attitude Index

- -Fashion Store Selecting Factor Index
- -Fashion Distribution Channel's preferences

Fashion Country of Origin Attitude Index

- -Fashion Country of Origin Consciousness Index
- Fashion Country of Origin's preferences

Fashion Market Segmentation

Fashion Consumer Market Scale Trend Information Research

Men's Fashion Market Scale Index

- * over 13 ages' men' Formal, Casual, Sports, Inner Wear
- 2008 Fall/Winter Market Scale
- 2009 Spring/Summer Market Scale
- 2009 Fall/Winter Market Scale (Exp)

Women's Fashion Market Scale Index

- * over 13 ages' women Formal, Casual, Sports, Inner Wear
- 2008 Fall/Winter Market Scale
- 2009 Spring/Summer Market Scale
- 2009 Fall/Winter Market Scale (Exp)

Children's Fashion Market Scale Index

- * 0 ~ 12 ages' Boy & Girl
- 2008 Fall/Winter Market Scale
- 2009 Spring/Summer Market Scale
- 2009 Fall/Winter Market Scale (Exp)

Shoes & Bags Market Scale Index

- * over 13 ages' men & women
- 2008 Fall/Winter Market Scale
- 2009 Spring/Summer Market Scale
- 2009 Fall/Winter Market Scale (Exp)

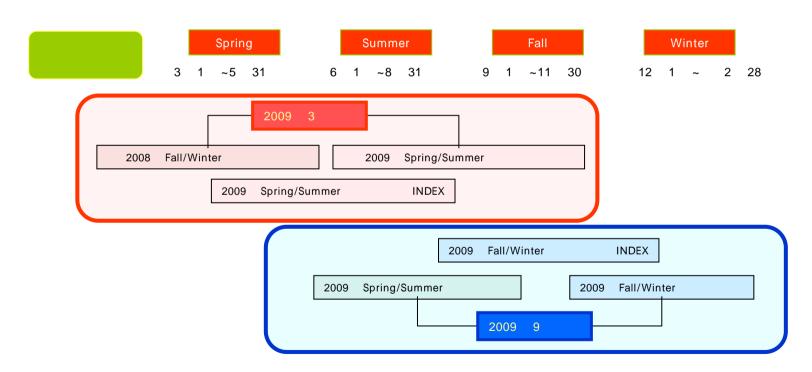


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2. Fashion Market Research : Consumer Survey

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   2)
                             12
              (\pm)1,400 , (\pm)1,400
                                            2,800
       : 16
        (PPS: Proportionate Probability Sampling)
                                          (Face-to-face Interview)
                            15 ~ 29 /
                                                     9 1 ~15
       : 2009
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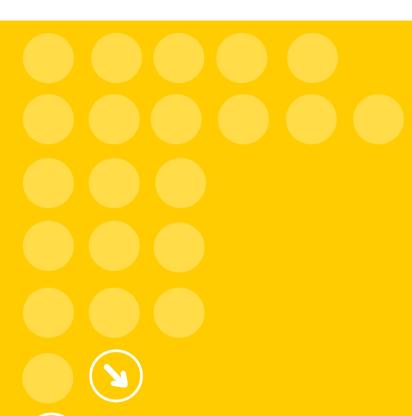
(:)	Junior 13-18		Young Career 19-29 30-39			Adult 40-49		Old 50-5	der 59	Silver 60		
sample size	160		240		280		290		200		240	



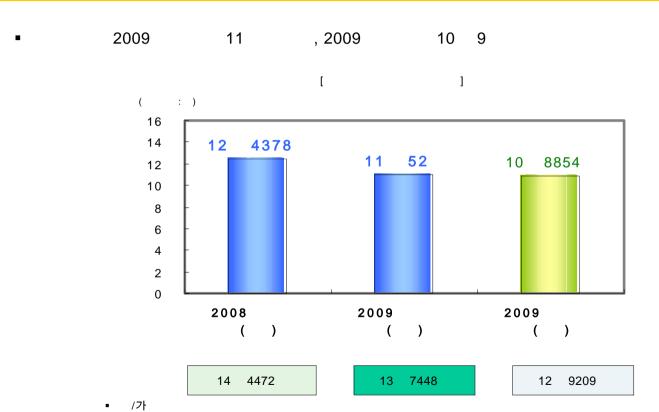
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$$F = \sum_{i=1} N_i, \ N_i = \sum_{j=1} T_j * C_j * P_j * S_j$$





Market Trend



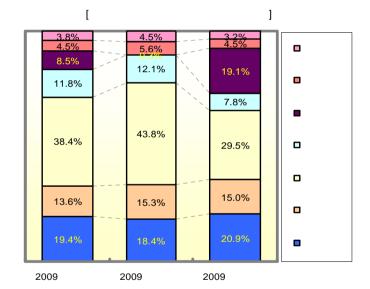


1

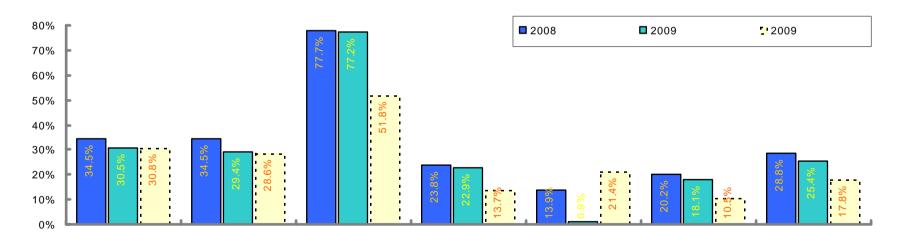
가

/	2008	2009	2009
1.	2 4104	2 197	2 2724
2.	1 6966	1 6788	1 6347
3.	4 7760	4 8216	3 2150
4.	1 4638	1 3364	8515
5.	1 538	371	2 753
6.	5608	6175	4863
7.	4764	4942	3501

8.	1 5837	2 887	1 5464
9. 가	4541	6509	4891

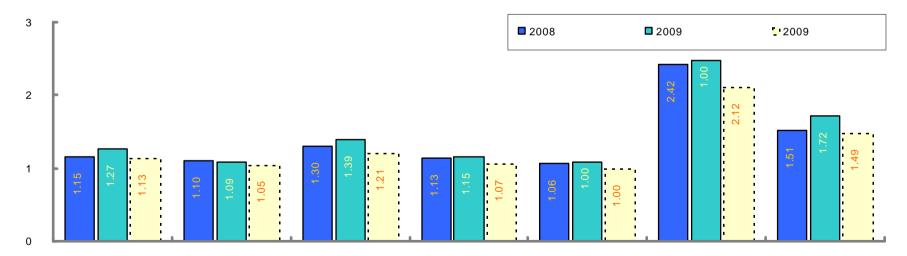




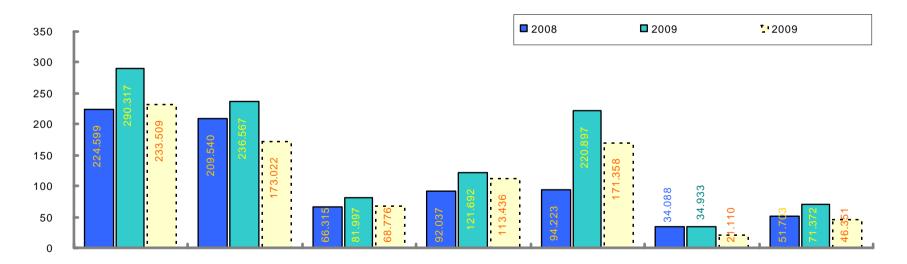




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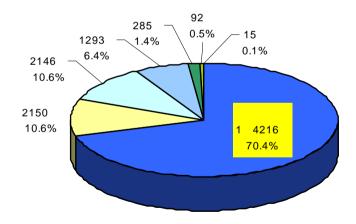
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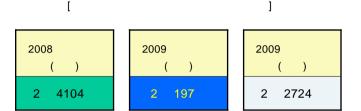


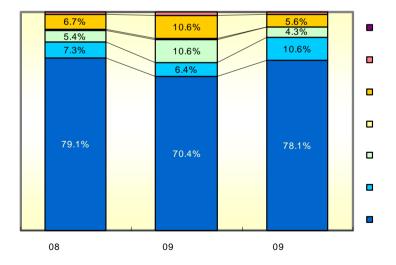
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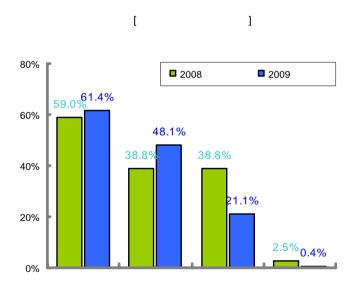


■ 가

		()	()	()	
2008	25.2%	1.08	331,732	1,906.6	79.1%
2009	18.0%	1.13	331,512	1,421.6	70.4%
2009	23.5%	1.05	339,571	1,773.8	78.1%

		()	()	()	
2008	9.3%	1.53	53,671	161.5	5.4%
2009	8.8%	1.76	65,693	215.0	10.6%
2009	4.0%	1.65	92,677	128.0	4.3%





61.4%

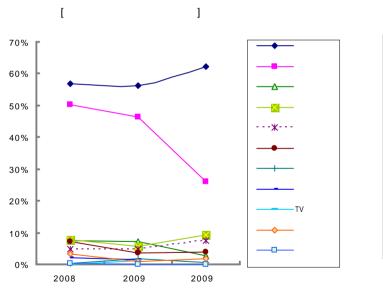
: 2009

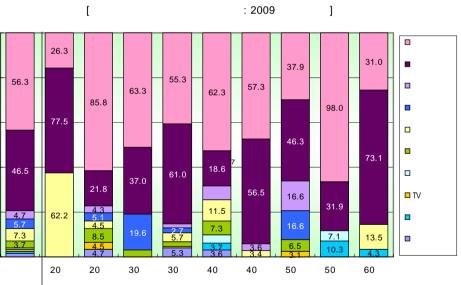
	(:%)	{N=236}	20~ 24	25~ 29	30~ 34	35~ 39	40~ 44	45~ 49	50~ 55	55~ 59	60
ĺ			21.1%	23.3	12.1	11.7	8.6	18.1	13.7	19.2	<u>65.5</u>	<u>55.9</u>
l			<u>61.4%</u>	25.2	100.2	<u>59.8</u>	90.6	52.9	62.1	41.0	85.9	16.4
l			48.1%	<u>117.5</u>	26.8	52.3	37.2	<u>47.5</u>	45.1	<u>63.9</u>	17.4	53.8
l			0.4%							2.8		

	(:%)	{N=236}					
Ī			21.1%	19.3	22.6	20.6	21.8	20.3
			<u>61.4%</u>	52.7	55.7	<u>72.2</u>	<u>67.1</u>	54.9
			48.1%	50.5	46.9	47.9	46.1	<u>50.3</u>
L			0.4%		1.0			0.9



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[가:2009]

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9.9%

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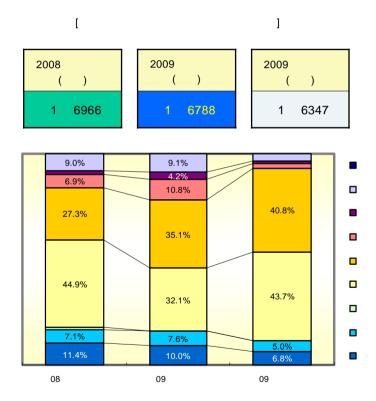
1177 652 17
7.0% 3.9% 0.1%

1401
8.3%

1535
9.1%

4945

29.5%



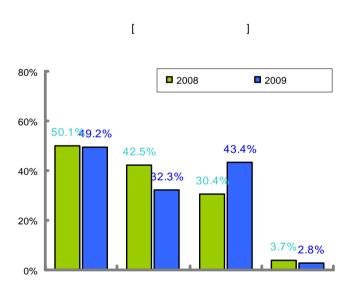


		()	()	()	
2008	6.9%	1.08	267,289	424.2	44.9%
2009	6.9%	1.08	267,289	540.3	32.1%
2009	10.2%	1.03	287,875	643.8	43.7%

		()	()	()	
2008	12.1%	1.10	246,939	698.7	27.3%
2009	12.1%	1.10	246,939	494.5	35.1%
2009	11.8%	1.02	266,974	689.9	40.8%



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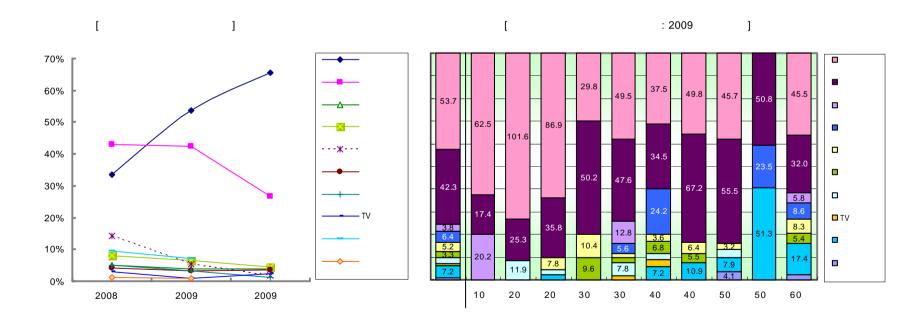


[: 2009

(:%)	{N=240}	19	20~ 24	25~ 29	30~ 34	35~ 39	40~ 44	45~ 49	50~ 55	55~ 59	60
		43.4%	33.1	12.7	26.4	<u>48.6</u>	29.0	<u>51.8</u>	<u>59.8</u>	45.8	<u>74.4</u>	63.6
		32.3%	24.6	<u>63.6</u>	<u>86.9</u>	31.5	37.5	17.9	5.0	17.2	0.0	2.9
		<u>49.2%</u>	42.2	62.5	20.1	19.8	59.9	47.4	75.1	57.8	51.3	56.9
		2.8%	0.0	0.0	3.1	0.0	4.8	6.8	0.0	0.0	0.0	2.6

(:%)	{N=240}					
		43.4%	<u>51.0</u>	33.5	46.9	46.3	40.1
		32.3%	25.9	24.4	<u>42.5</u>	31.6	33.0
		<u>49.2%</u>	45.0	<u>62.0</u>	41.1	<u>48.1</u>	<u>50.4</u>
		2.8%	1.9	4.1	2.3	0.9	4.9

■ vs.가







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		10	20	30	40	50	60
1	()	()	()	()	()	()	()
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• : 40~50 , vs. vs. 3

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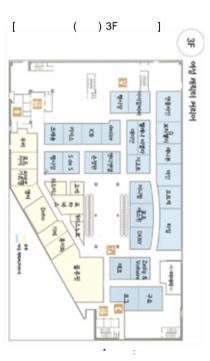
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・ : 30 vs. vs. 가





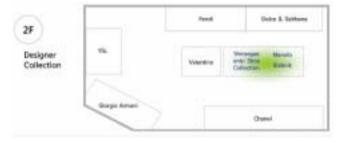


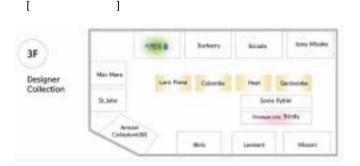


Boutique

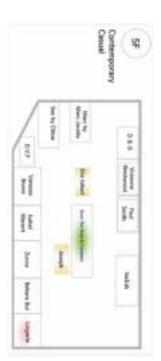
Itan Conf & Aquel

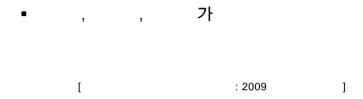
Ita

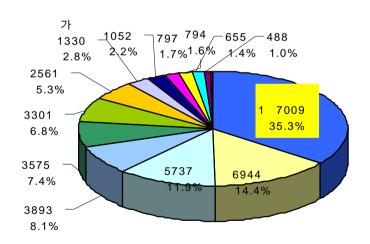


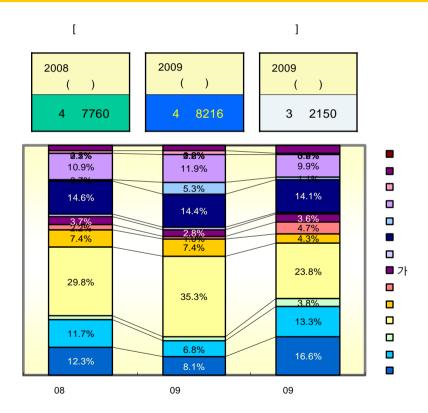












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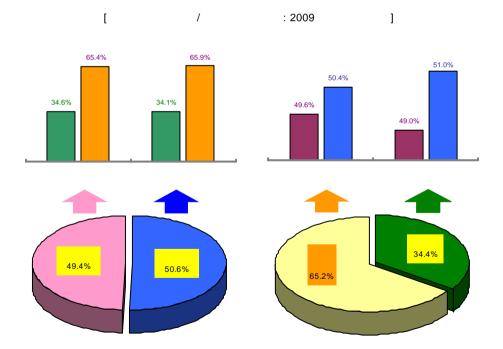
		()	()	()	
2008	42.5%	1.59	49,519	1,421.7	29.8%
2009	50.5%	1.71	46,414	1,700.9	35.3%
2009	17.9%	1.63	61,664	764.5	23.8%

		()	()	()	
2008	15.9%	1.18	65,624	522.5	10.9%
2009	13.2%	1.22	83,976	573.7	11.9%
2009	8.1%	1.07	86,421	319.8	9.9%



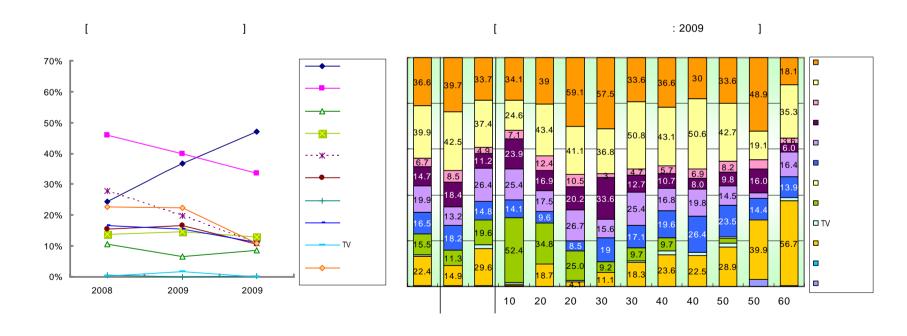


2008	2009	2009
4 7760	4 8216	3 2150
2 3560	2 4880	1 5631
2 4120	2 4085	1 6519





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		10	20	30	40	50	60
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6			가		()		가
7	()	()		()	()		,
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[가:2009]

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SPA vs. vs. SPA







SPA vs. vs. SPA



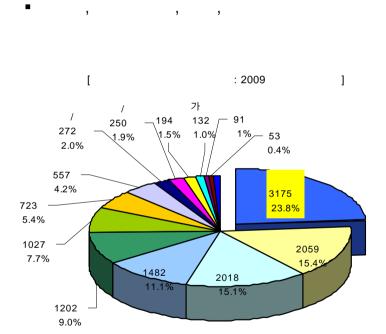


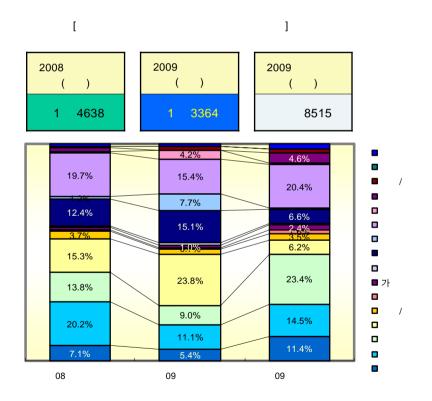
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2008 5.4% 1.25 83,968 240.6 15.3% 6.9% 1.32 81,620 317.5 23.8% 2009 1.5% 1.09 75,399 52.5 6.2%

		()	()	()	
2008	5.9%	1.12	110,203	310.2	19.7%
2009	3.8%	1.20	106,164	205.9	15.4%
2009	3.3%	1.06	118,155	173.6	20.4%



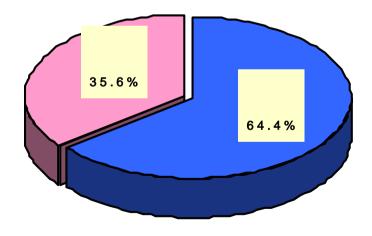
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2008	2009	2009	
1 4638	1 3364	8515	
9345	8590	5883	
5278	4773	2632	

[: 2009]





63.5

20.4

31.6

19.3

47.8

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52.4

5.2

54.2

8.3

61.4

3.9

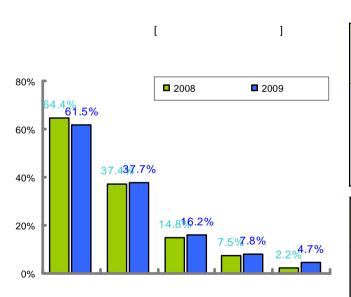
54.1

16.3

54.9

6.

•



(:%)	{N=328}			19	20~ 24	25~ 29	30~ 34	35~ 39	40~ 44	45~ 49	50~ 55	55~ 59	60
		7.8%	5.2	12.7	7.4	0.0	20.6	0.0	13.5	4.5	0.0	9.9	9.6	5.0

8.1

17.5

18.1

84.0

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13.5

8.7

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: 2009

10.2

33.3

25.7

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0.0

18.4

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41.2

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51.7

4.7%

37.7%

16.2%

61.5%

3.8

35.8

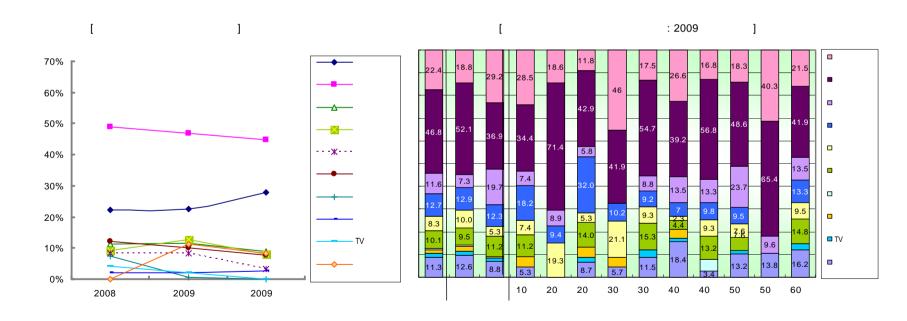
17.4

66.7

(:%)	{N=328}						
		7.8%	2.3	4.2	15.5	8.3	13.7	7.4
		4.7%	3.9	3.2	6.9	5.6	6.9	4.1
		37.7%	37.4	40.9	34.6	36.0	35.2	39.1
		16.2%	7.5	22.1	16.3	15.3	12.5	17.0
		61.5%	66.6	56.9	62.6	68.8	73.8	55.5



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[가:2009]

		10	20	30	40	50	60
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8	가	가	가	()	가	가	가
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12							
13	가	가			가	가	
14			가	가			가

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[가 : 2009

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• : Do sports , See sports



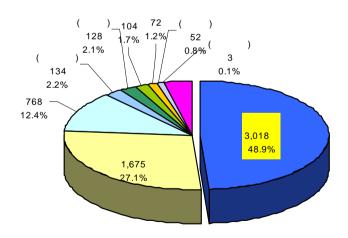


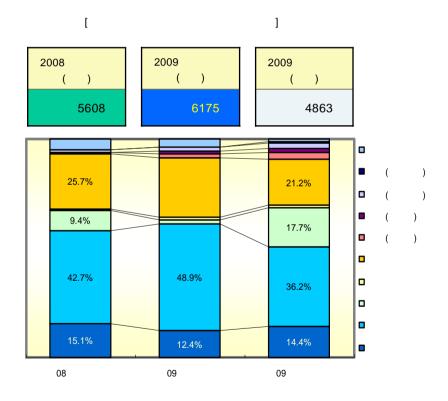




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		()	()	()	
2008	14.1%	2.79	14,338	239.5	42.7%
2009	12.7%	2.80	19,974	301.8	48.9%
2009	5.3%	2.94	26,683	176.3	36.2%

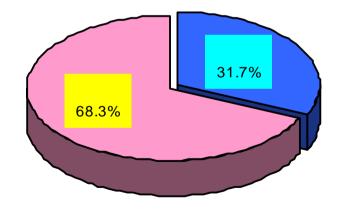
		()	()	()	
2008	5.1%	1.87	35,659	144.1	25.7%
2009	6.4%	2.06	29,878	167.5	27.1%
2009	2.9%	2.01	41,153	102.9	21.2%

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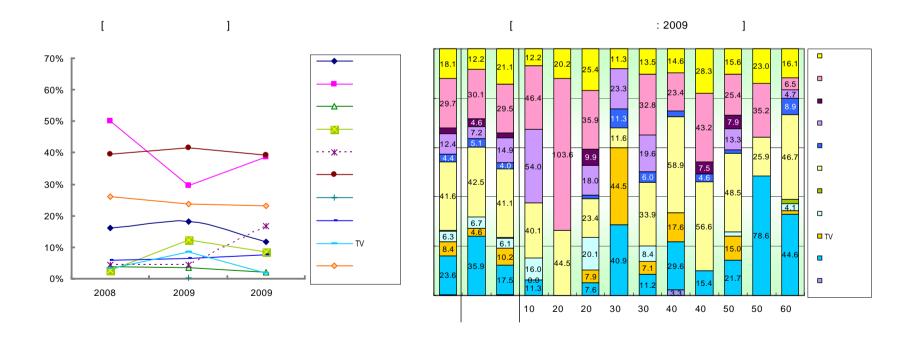


2008	2009	2009	
5608	6175	4863	
1880	1958	1062	
3767	4217	3804	





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9	()	()	()	()	()	()	()
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13			가			가	
14	가	가		가	가		

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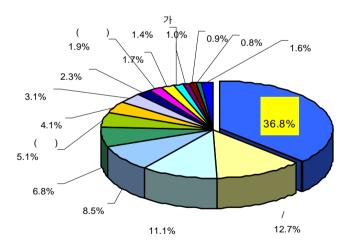
[가: 2009]

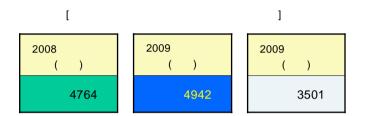
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13			
14	가	가	가

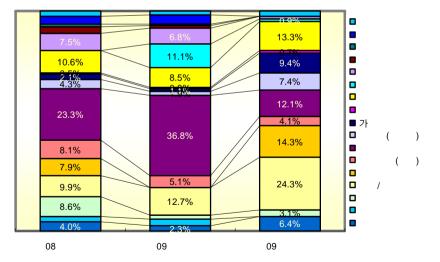


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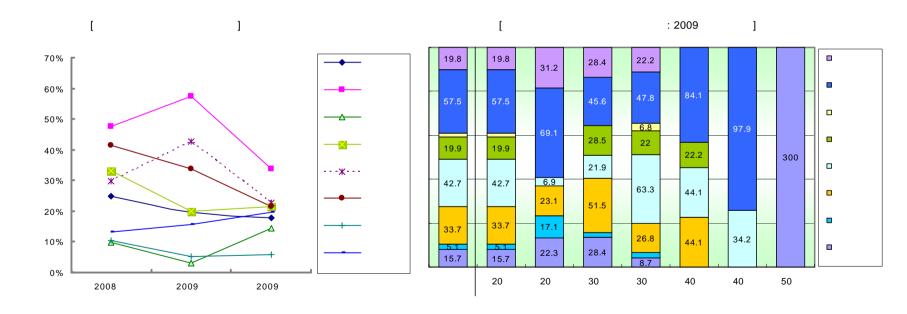
[/

		()	()	()	
2008	12.3%	1.83	40,524	111.2	23.3%
2009	14.1%	2.24	47,018	182.0	36.8%
2009	3.3%	1.86	55,896	42.3	12.1%

		()	()	()	
2008	4.9%	1.22	64,848	47.3	9.9%
2009	4.3%	1.30	91,936	62.7	12.7%
2009	5.4%	1.42	89,824	85.1	24.3%

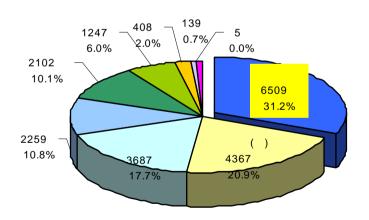


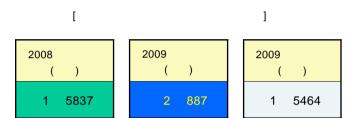
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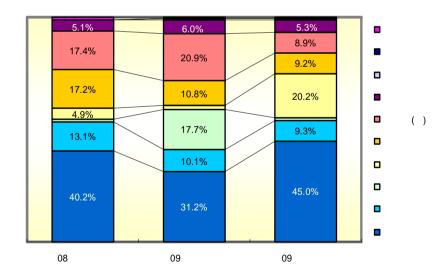




[: 2009







■ , 가

1

		()	()	()	
2008	10.6%	1.23	115,458	637.5	40.2%
2009	9.7%	1.10	142,893	650.9	31.2%
2009	9.7%	1.24	135,345	696.1	46.0%

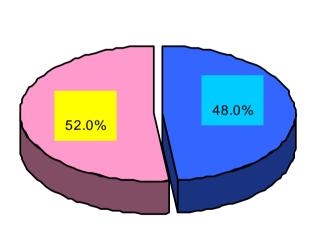
		()	()	()	
2008	9.7%	1.10	60,705	274.6	17.4%
2009	10.4%	1.21	81,877	436.7	20.9%
2009	3.7%	1.02	86,470	137.8	8.9%



•

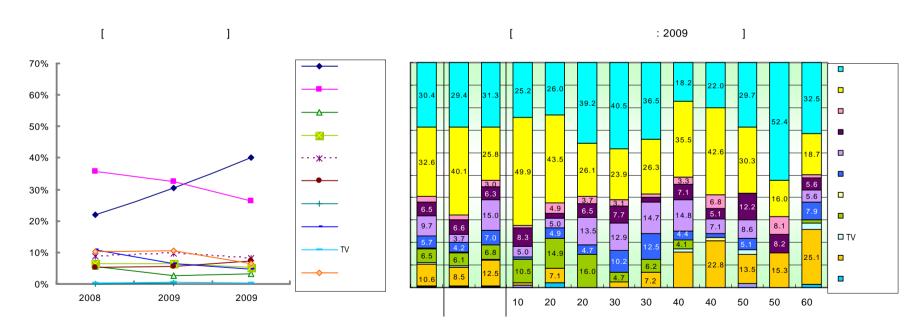


2008	2009	2009
1 5837	2 887	1 5465
7910	1 36	8165
7902	1 853	7287



: 2009

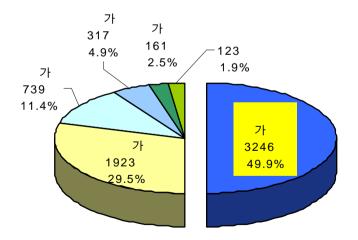
■ 가

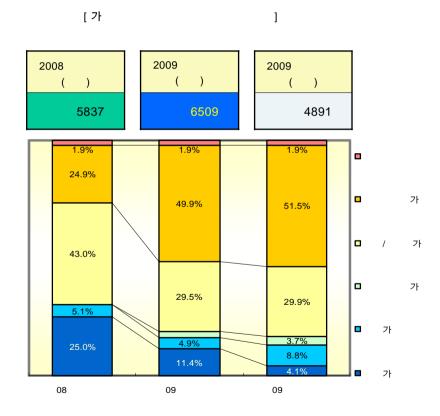


10. 가

■ 가

[가 : 2009







10. 가

■ 가

[가 ()]

		()	()	()	
2008	1.9%	1.07	225,031	195.1	24.9%
2009	2.9%	1.00	261,131	324.6	49.9%
2009	2.4%	1.00	245,953	251.8	61.6%

		()	()	()	
2008	4.5%	1.05	56,230	112.9	43.0%
2009	4.5%	1.05	95,298	192.3	29.6%
2009	4.0%	1.02	85,179	146.4	29.9%

가



10. 가

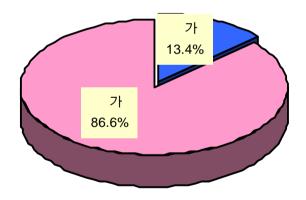
■ 가

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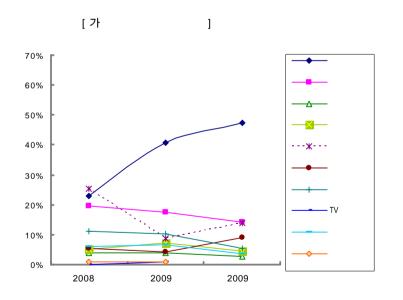


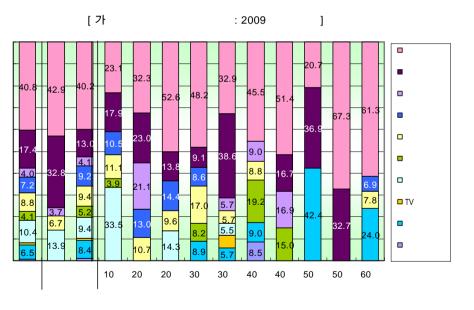
가	2008	2009	2009
	4541	2 887	4890
가	921	868	1399
가	3679	5611	3491

[가 : 2009]

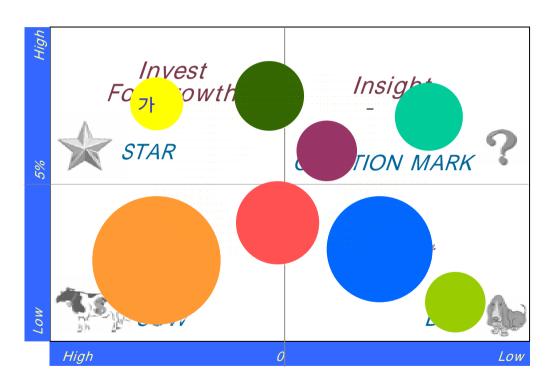


10. 가

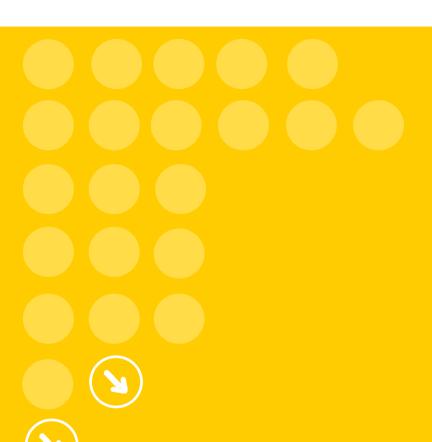




BCG Matrix : 2010



Relative Market Share

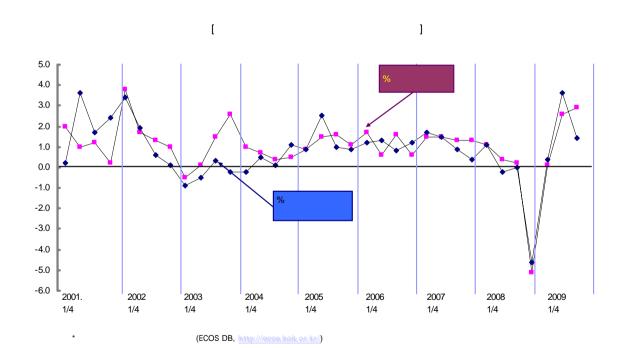


Strategy Issue

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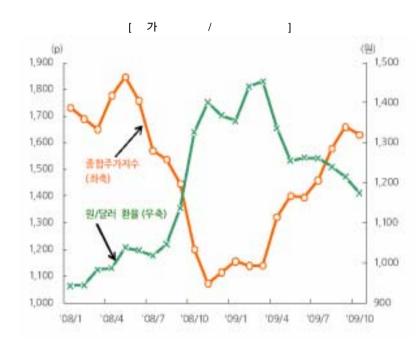
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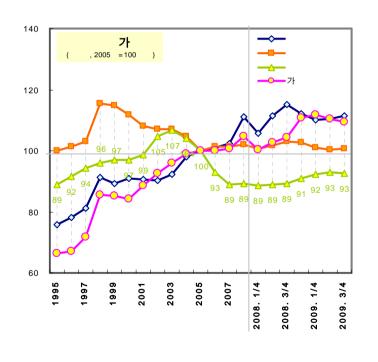
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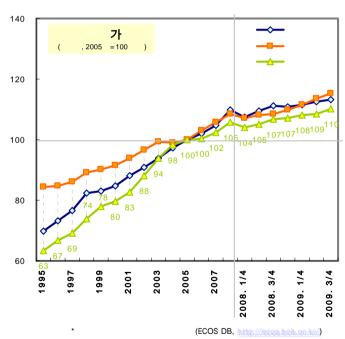
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ISSUE 1.

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5%

/ .0/)	(10() 2002 2003 2004 2005 20	2006	2007	2009	2010 ()							
(:%)	2002	2003	2004	2005	2006	2007	(IMF) (KDI)	KDI	SERI	LGERI	OECD	IMF
	2.3	3.0	3.9	4.3	3.6	3.9	-1.1	3.1	3.5	-1.4	3.4	3.1
	0.3	2.4	3.1	4.4	3.2	3.3	-2.7	1.5	2.1	-2.8	2.5	1.5
	0.4	0.3	2.5	2.7	2.6	2.2	-5.4	1.7	1.1	-5.5	1.8	1.7
EU	1.5	0.8	0.9	2.0	1.3	2.8	-4.2	0.3	1.0	-4.7	0.9	0.3
	7.3	8.0	9.3	9.5	9.9	11.1	8.5	9.0	9.8	8.2	9.7	9.0
	3.1	6.3	3.1	4.6	4.0	5.0	0.2	5.5	4.3	4.2	4.4	3.6
	4.7	6.8	-1.4	-0.5	3.2	4.2	0.4	4.9	3.1	3.7	2.9	2.4
가	4.1	2.7	3.6	3.6	2.7	2.2	2.8	2.7	2.9	2.7	2.8	
	3.8	3.1	3.4	3.5	3.7	3.5	3.7	3.4	3.4	3.2	3.6	

, OECD 가): 2009 11 26 / LG(LG : SERI():9 / OECD: 11 19 / IMF: 10 /KDI 11 22

ISSUE 1.

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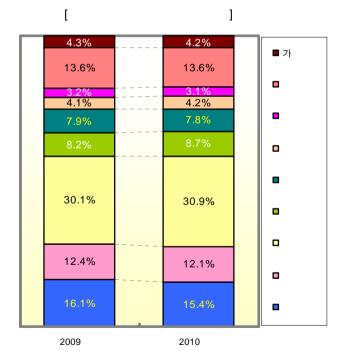
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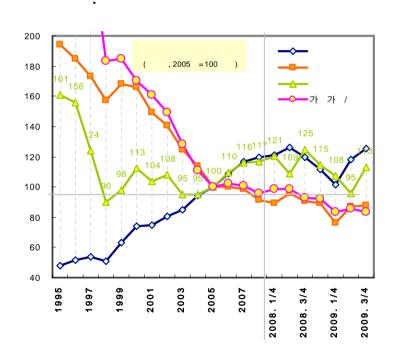
■ 5% V 2010 5.5%

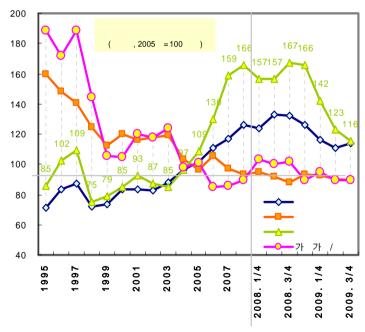
	2009
1.	4 2921
2.	3 3135
3.	8 365
4.	2 1879
5.	2 1124
6.	1 1039
7.	8443
8.	3 6353
9. 가	1 1399
	26 6658

		2010 ()
→ 1%	-	4 3350
→ 3%	-	3 4129
→ 8%	→	8 6795
→ 12%	-	2 4504
→ 4%	-	2 1969
→ 8%	-	1 1922
→ 2%	-	8612
→ 5%	-	3 8170
→ 4%	-	1 1855
5.5%		28 1306





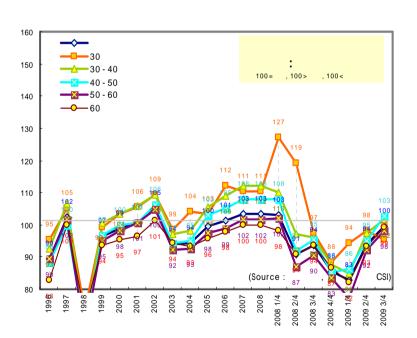




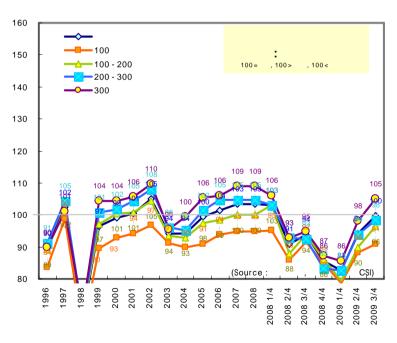


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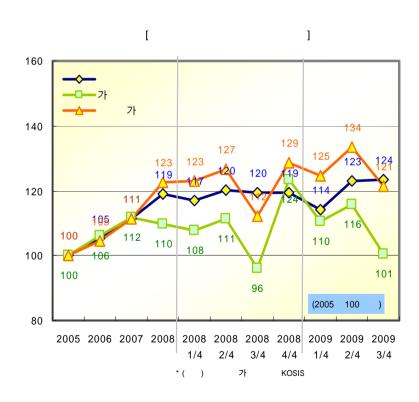
가



가

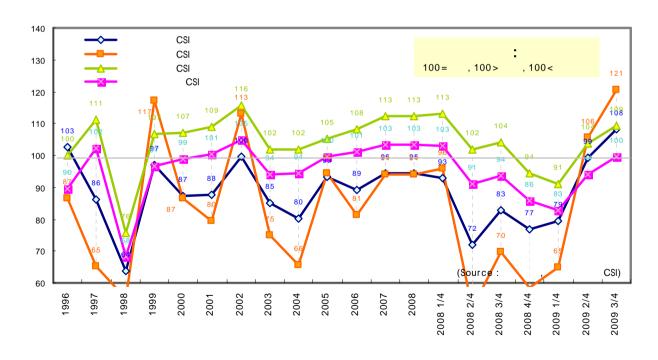






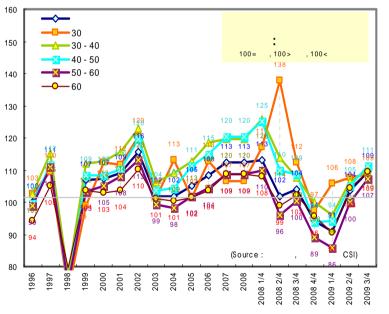


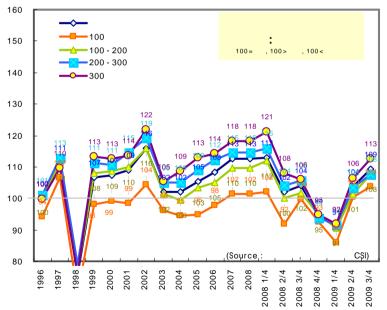
■ 가 2002



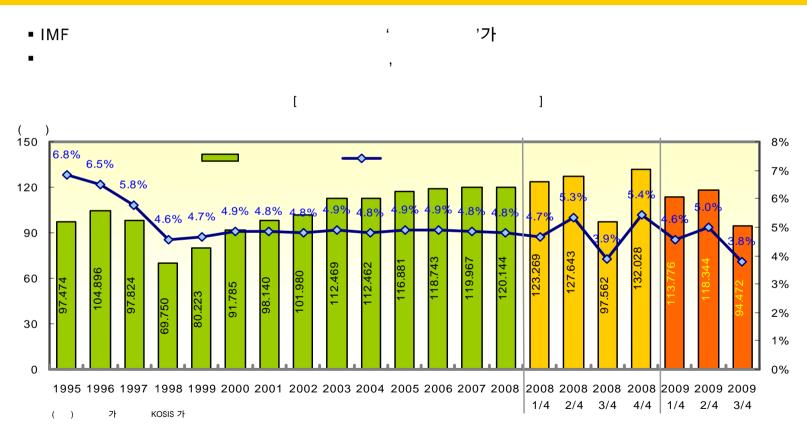


■ IMF '가



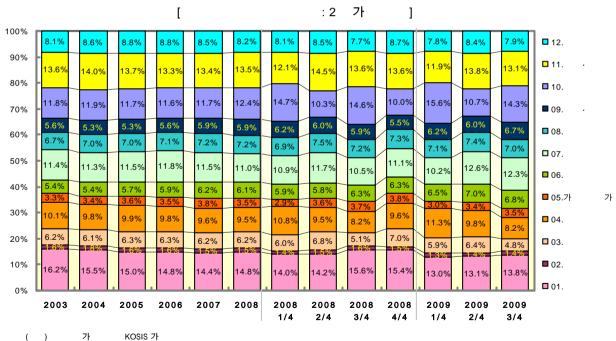






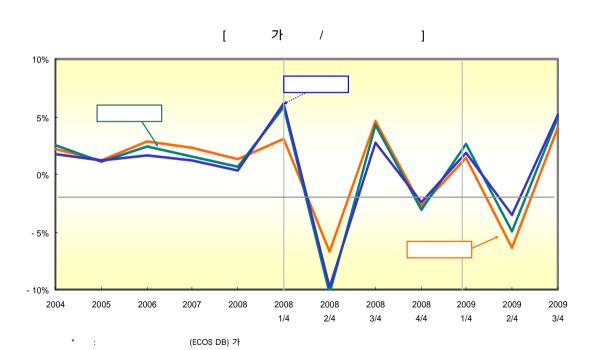




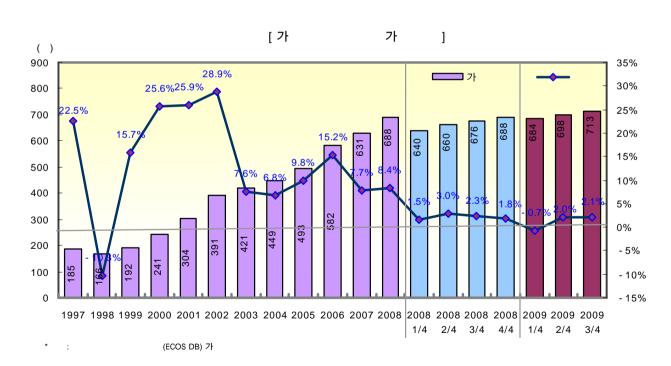




■ 가





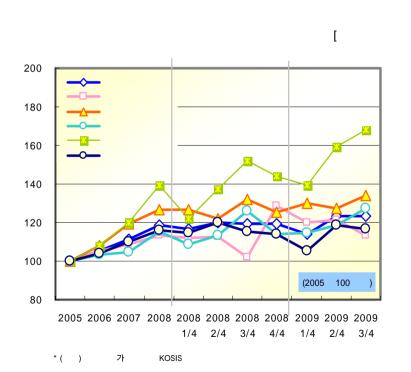


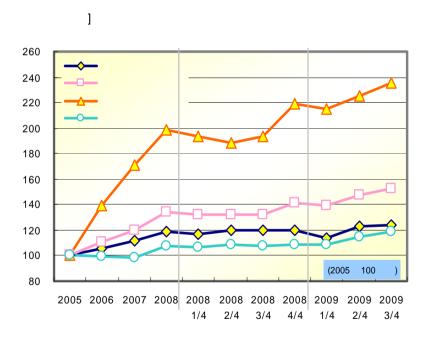
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■ VS.





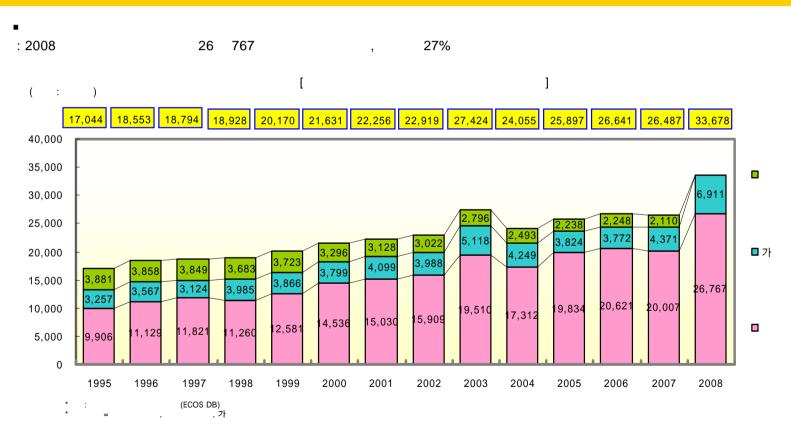


가 30~40 Q/P 가

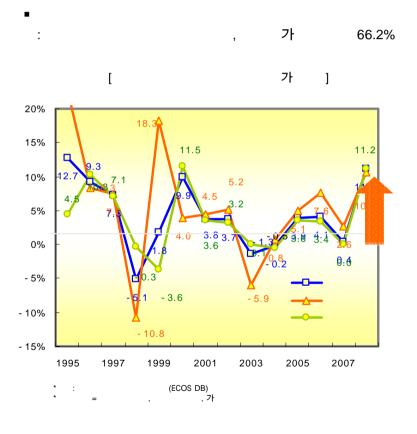
가

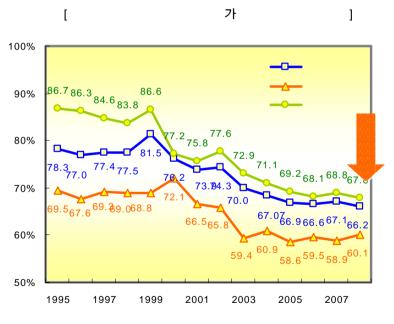
VS.



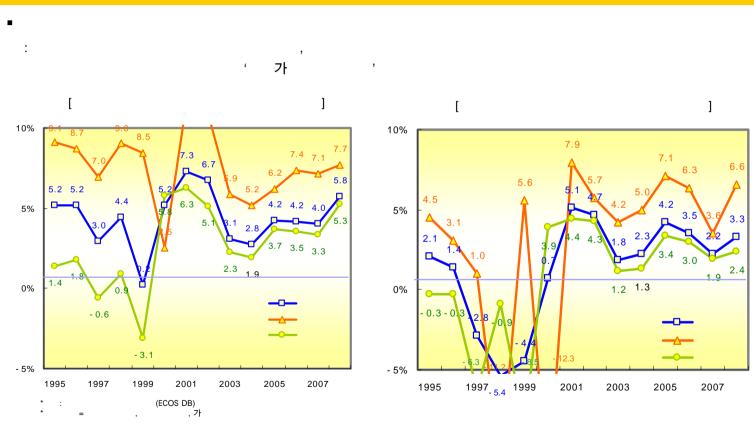














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1,587

: 2008 • 27. 1,996 : On-Duty 25.SK 2,043 Off-Duty 24. 2,197 21. 2,545 20. 2,608 17. 2,843 15. 2,945 7. 3,778 8. 3,778 11,360 1. 29. 1,847 31. 가 1,723 2. 10,477 7. 4,020 26 3.FNC 11. 8,414 3,346 13.F&F 4.LG 7,908 3,103 23. 2,269 5. 6,300 28. 1,915 22. 2,483 30. 1,739 6. 9. 4,047) 2008 annual Report 3,640 12. 3,328 () 2008 10. INT 3,591 14. 3,028 () 19. 2,812 16. 2,937

18.EXR

20.LS

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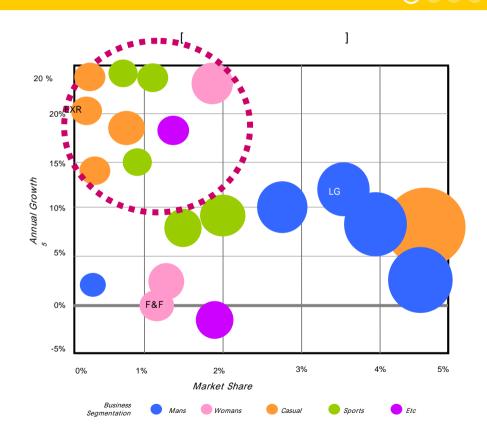
26.

Growth/Share Matrix in Korea Fashion Company

•	1		
:			가
[5]

			5 CAGR
	()	11,360	7.08%
	()	10,477	2.85%
FnC	+)	8,414	8.22%
LG		7,908	8.98%
(+	+ 21)	6,300	7.61%
		4,047	6.33%
(+ +	+)	4,020	33.34%
		3,778	-0.98%
		3,640	5.04%
	INT	3,591	15.36%
		3,346	5.17%

) 2008 annual Report ()





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1. 2. ' 3.

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SPA

가 ■ 2004 가

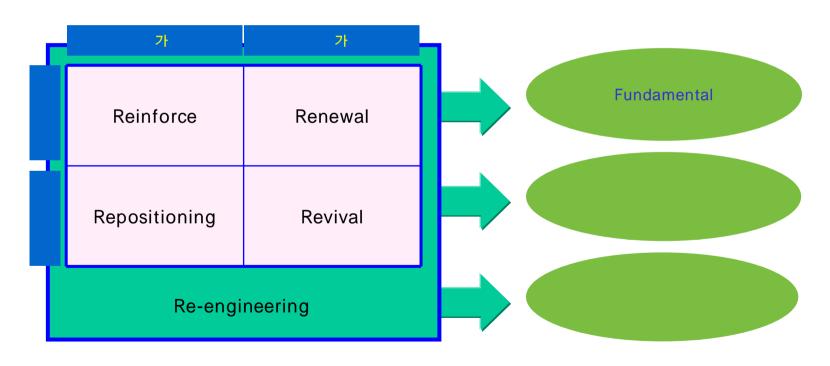
가 1. 2.

ISSUE 5.

가



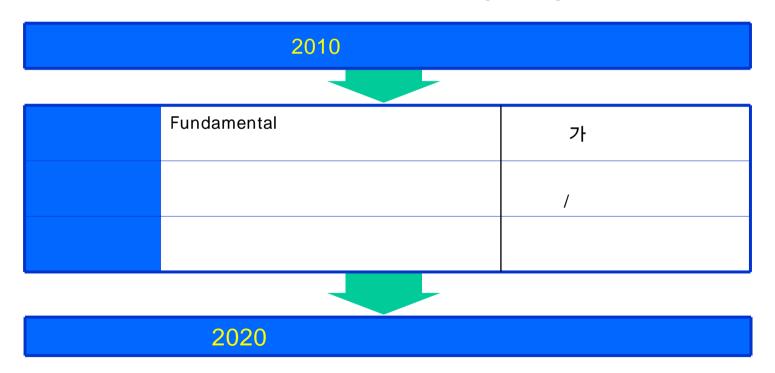
■ 가 BIZ model



ISSUE 5. 가

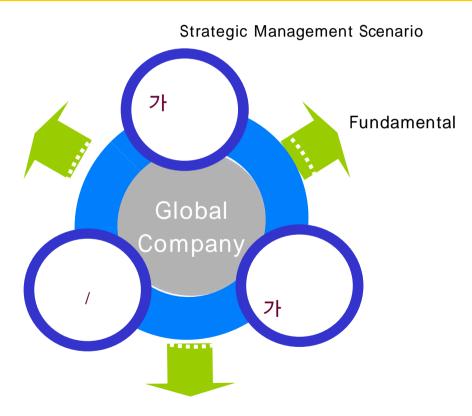


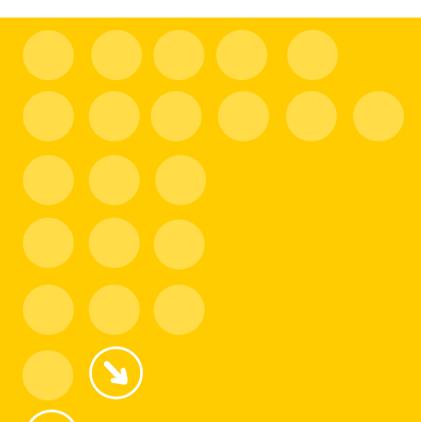
Strategic Management Scenario



ISSUE 5. 가



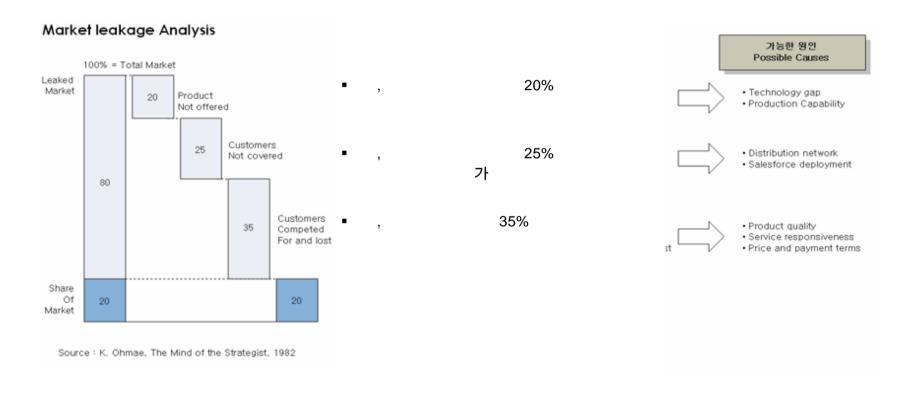




Strategy Suggestion

2010

(Market Coverage)



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1. FAD fashion

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가	14. 15. 16.		가		
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	/	4. 5. 6. 7. 8. 9. 10. 11. 12.		가			
	가	14. 15. 16.		7	·		
	/	17. 18. 19. 20.		가			
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- 1. FAD fashion

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		2786 7786 (A, DADOS)	JBTG 981 (1,5148)	AU 98 (1,3548)	수준주 설명 (1,201명)	\$160 (800 E)	
	함체	56.9	17.2	23.0	30.0	32.9	11.4
	1978	5.8	10.8	18.2	37.0	33.0	-
ч	2973	10.1	16.3	21.7	53.7	80.0	250
퍘	3002	11.9	21.5	26.1	34.6	54.5	6.3
	4003	11.7	17.5	21.8	25.9	28.7	13.3
	50000160	10.5	19.0	21.4	29.0	38.5	100
	면제	49.1	13.9	22.6	30.2	26.6	14.3
	1003	6.1	10.4	100	31.3	29.6	
он	2973	9.4	16.0	14.3	52.9	83.3	
Ñ.	300	11.5	12.7	26.8	31.1	25.0	
	4003	11.5	12.9	21.1	30.6	22.4	154
	10104000	16.6	28.0	16.3	22.1	32.0	33.3

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 - 1. FAD fashion
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공장의 - 바이ઇ 보신 전혀 많은 되지 만드는 함께서 늦던

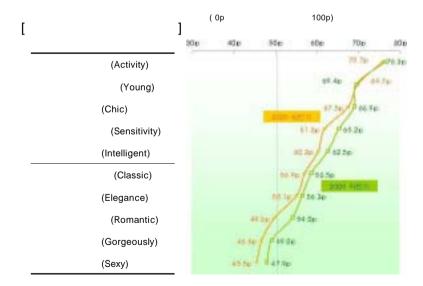
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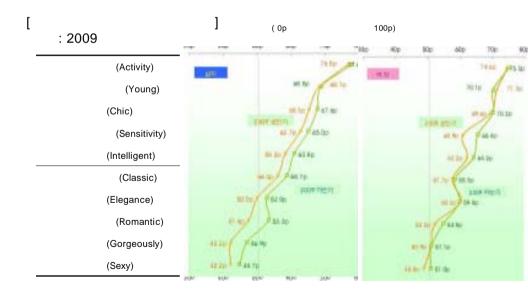
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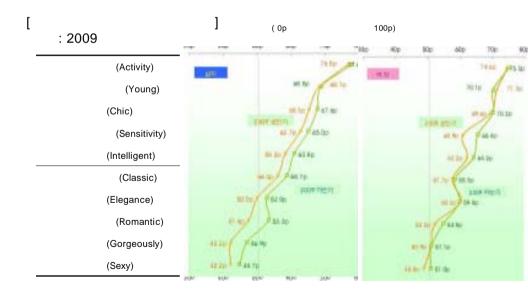
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Swarm Marketing

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www.stussy.com

www.kasina.co.kr

by Keith Haring



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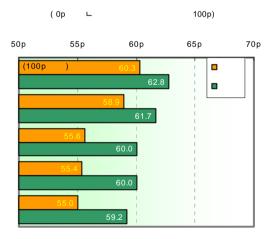
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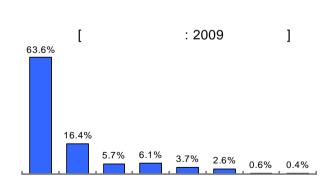


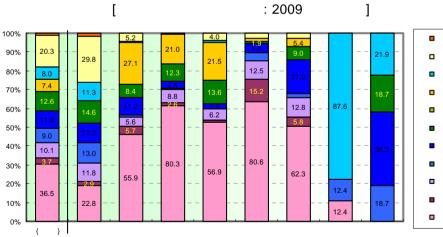
1. V

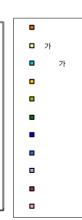
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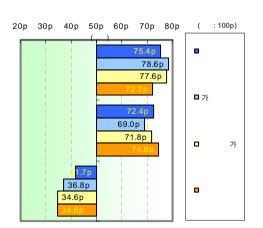
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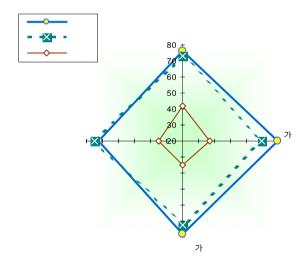
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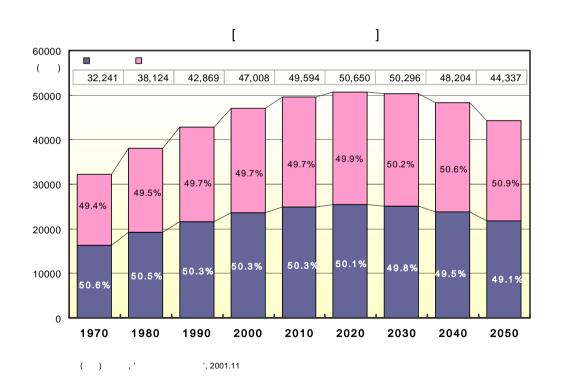








■ 2023





■ 2023

1. 가

52% 48%) 가

1999	2000	2001	2002	2003	2004	2005	2006	2007	2008
46.7%	46.8%	49.4%	48.4%	51.2%	51.6%	53.2%	52.0%	51.3%	51.1%
53.3%	53.2%	50.6%	51.6%	48.8%	48.4%	46.8%	48.0%	48.7%	48.9%

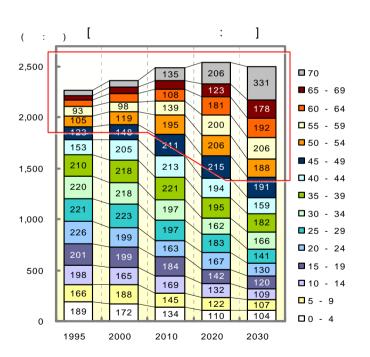
()

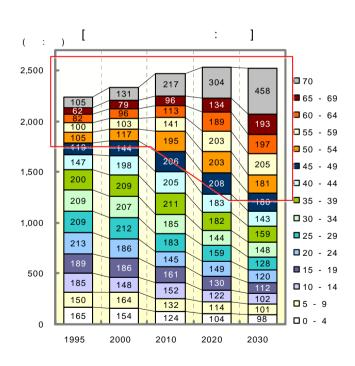


2023

2. 50 older

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2.

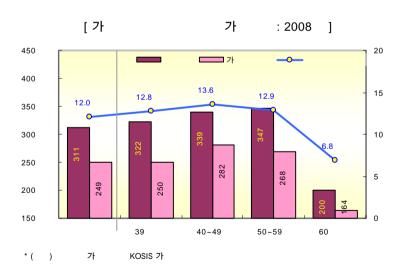


■ 2023

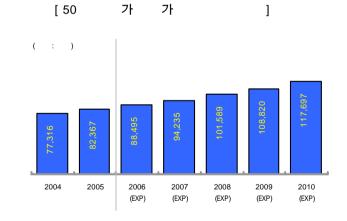
2. 50 older

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20 4-50 가



* : LG

■ 2023

3. VS.

100% 90% 80% 4.8 4.6 3.2 3.6 70% 60% 29.0 27.0 24.1 13.9 19.5 22.2 50% 2.4 3.3 3.0 5.5 40% 30% 6.6 20% 20.8 20.5 19.9 10% 0% 1970 1980 1990 2000 2005 2010 2020 2030

, <u>6</u>

[: 2007]
	23 3670
6	11 2370
0	48.1%
	7 720
	<u>30.3%</u>
	1 2680
	5.4%
	1 270
	4.4%
	9240
	4.0%
	3080
	1.3%
	6370
	2.7%

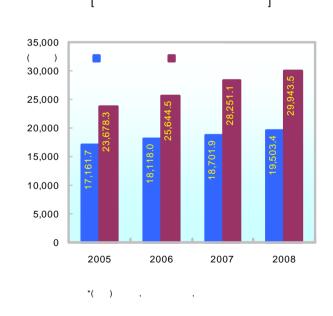
48.1%

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	.1% .5%	\neg	5.8% 3.4%	_	5.5% 3.9%	/	5.6% 4.2%	╄	5.6% 4.2%	_	5.6%		5.5% 4.1%	_	5.6%	4	5.9%		5.8%		5.9%	ı	
Ī							4.2%		4.2%		4.0%		4.170		4.7%		4.8%		4.7%		4.8%		•
<u> </u>	0.3%		59.6%		59.3%		58.7%		59.0%		60.0%		58.3%		57.5%		55.8%		58.0%		56.9%	-	•
																		/					0
9.	.1%		9.0%		8.6%		8.9%	Ī	8.5%		8.6%		9.6%		8.7%		9.2%	/	8.8%		9.4%		
11	1.6%		11.9%		12.4%		12.3%		12.5%	/	11.8%		12.8%	_	12.2%		13.2%	/	12.0%		12.6%		•
8.	.4%		8.4%		8.2%		8.0%		8.1%		7.8%		7.2%		9.0%		8.8%	L	8.3%		7.7%		
20	005		2006		2007		2008	2	2008 1/4	4 2	2008 2/	4 2	2008 3/	4 2	2008 4/	4 2	2009 1/	4 2	2009 2/	4 2	2009 3/4	1	



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2006

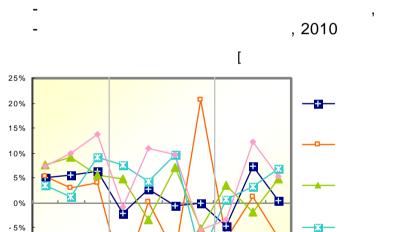
2008

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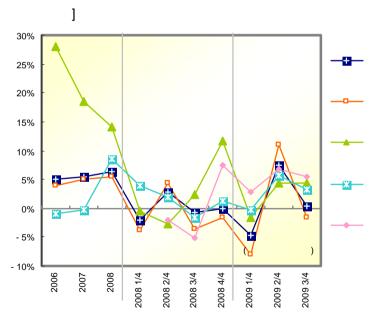




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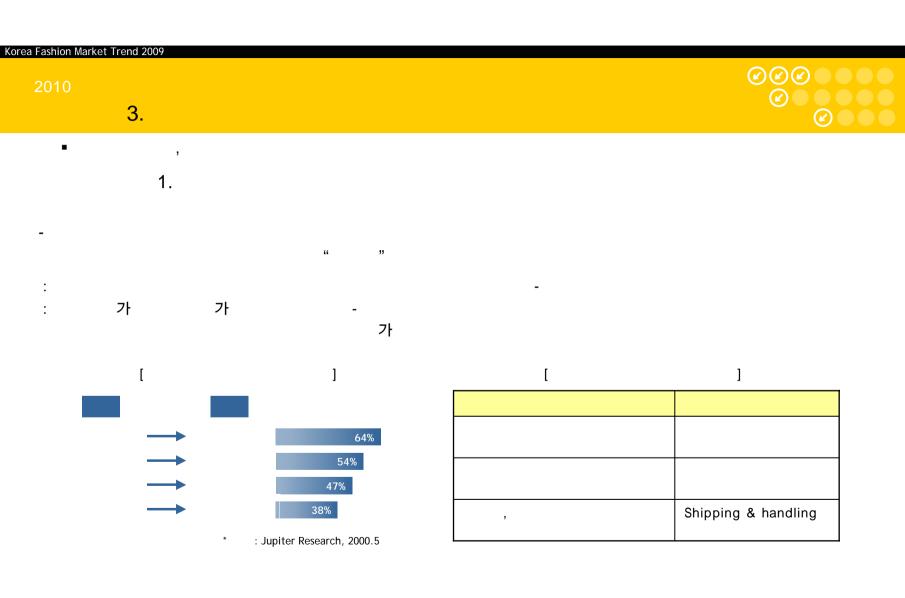
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	5,457	4,060	820	629	307	11 272
	1,135	7,946				9 81
		6,349	400	1,652		6 749
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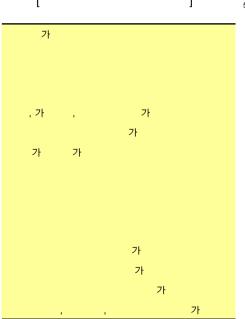
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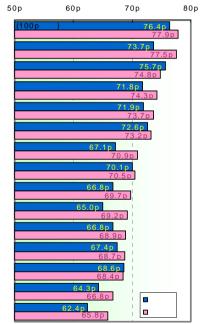
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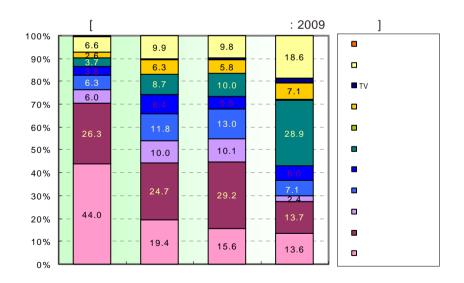


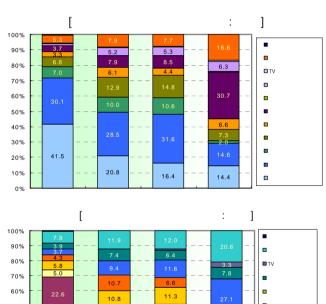


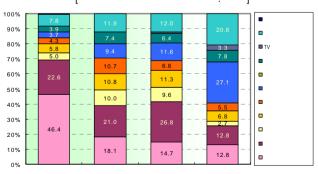
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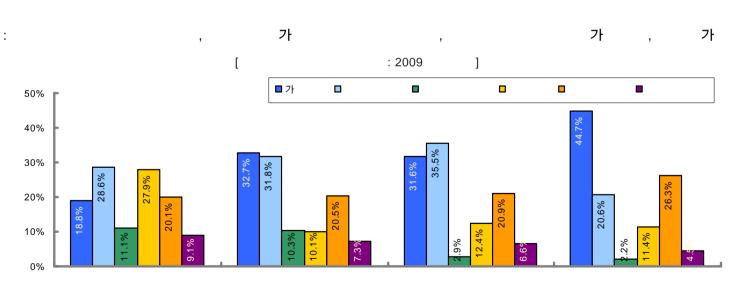




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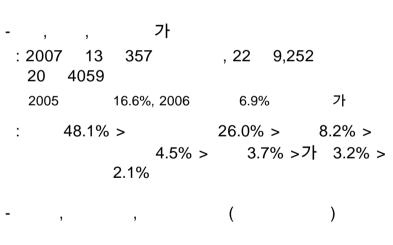
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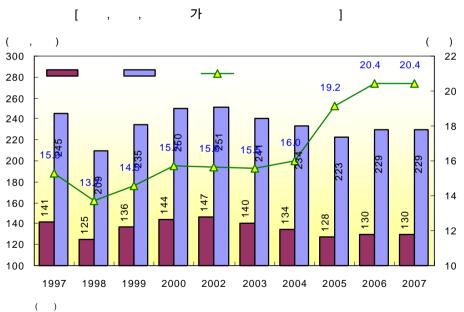
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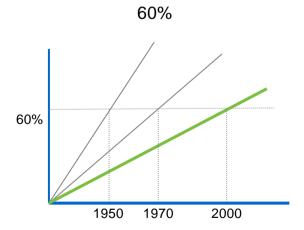
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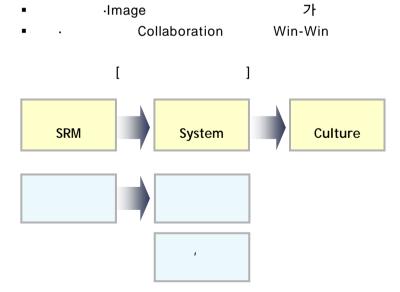
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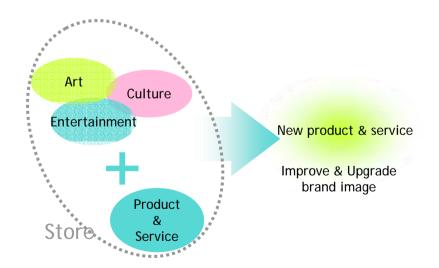


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	(:)	2004	2005	2,006	2007	2,008	2009 (F)
			67,200	74,000	82,000	90,400	99,500	109,500
		()	14,800	30,500	48,300	67,400	83,000	100,000
			82,000	104,500	130,300	157,800	182,500	209,500
TV	TV	5	29,300	32,660	33,880	32,700	34,340	36,370
			9,000	8,500	6,000	4,500	3,000	2,000
		T				20	130	700
			38,300	41,160	39,880	37,220	37,470	39,070
	TV	5	800	900	1,600	1,700	1,870	1,960
			200	200	150	100	100	50
		T						20
			1,000	1,100	1,750	1,800	1,970	2,030
	IP TV	(TV)					17	240
							3	80
			-	-	-	=	20	320
			39,300	42,260	41,630	39,020	39,460	41,420
			5,600	5,800	6,490	6,500	7,080	7,000
	M-comm	erce				20	600	1,500
			126,900	152,560	178,420	203,340	229,640	259,420

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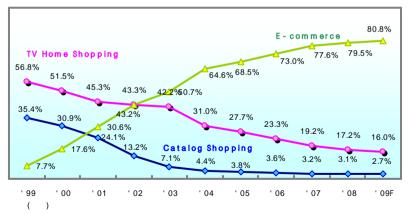


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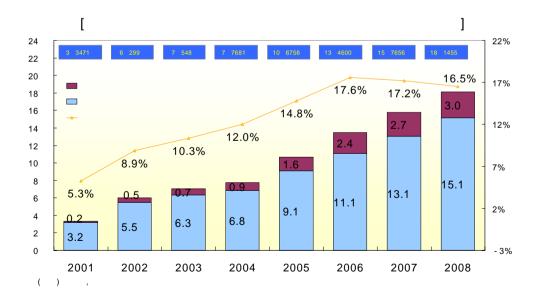
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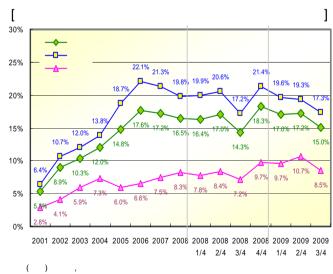
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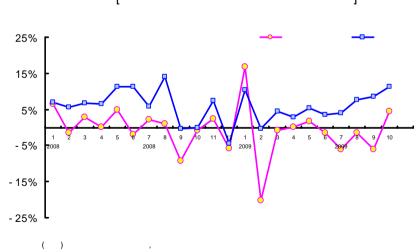
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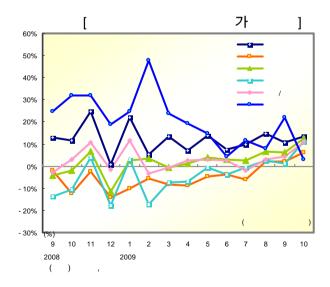
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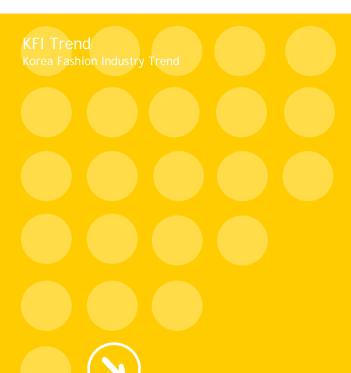
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Korea Fashion Industry Index Research

2009 KFI research analysis & 2010 Market Forecasting

Korea Fashion Market Trend 2009