



Passport

Apparel and Footwear in South Korea

Euromonitor International

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Some content and data have been
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APPAREL AND FOOTWEAR IN SOUTH KOREA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

COVID-19 impact on apparel and footwear

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COVID-19 country impact

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Company response

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Retailing shift

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What next for apparel and footwear?

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MARKET DATA

Table 1 Sales of Apparel and Footwear by Category: Volume 2015-2020

mn units

	2015	2016	2017	2018	2019	2020
Apparel	Data removed from sample					
Footwear						
Apparel and Footwear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Sportswear volume not researched

Table 2 Sales of Apparel and Footwear by Category: Value 2015-2020

KRW billion

	2015	2016	2017	2018	2019	2020
Apparel	Data removed from sample					
Footwear						
Sportswear						
Apparel and Footwear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Apparel and Footwear by Category: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Apparel	Data removed from sample		
Footwear			
Apparel and Footwear			
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources		
Note:	Sportswear volume not researched		

Table 4 Sales of Apparel and Footwear by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Apparel	Data removed from sample		
Footwear			
Sportswear			
Apparel and Footwear			
Source:	Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources		

Table 5 NBO Company Shares of Apparel and Footwear: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Apparel and Footwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Distribution of Apparel and Footwear by Format: % Value 2015-2020

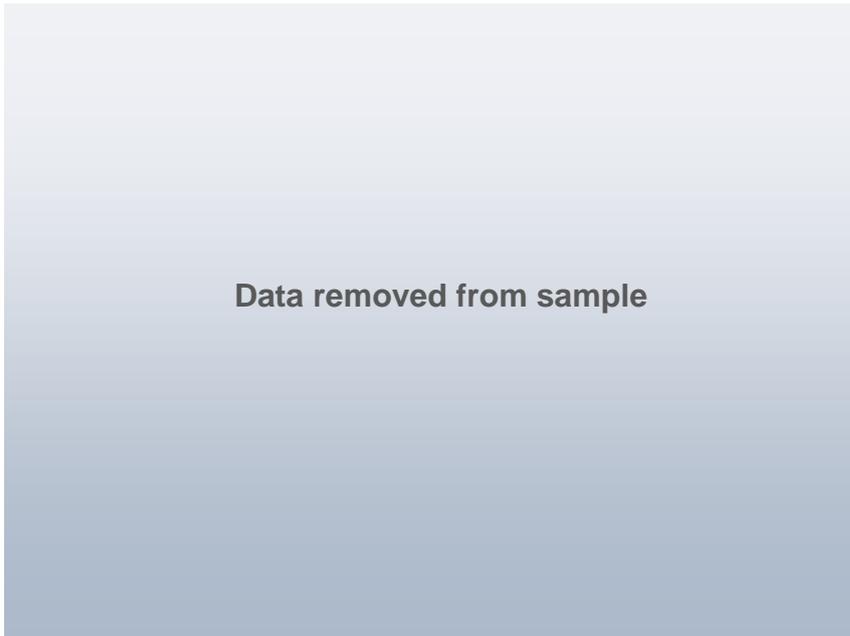
% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Apparel and Footwear Specialist Retailers						
-- Leisure and Personal Goods Specialist Retailers						
--- Sports goods stores						
--- Other Leisure and Personal Goods Specialist Apparel Retailers						
-- Other Non-Grocery Specialists						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- E-Commerce						
- Vending						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Distribution of Apparel and Footwear by Format and Category: % Value 2020

% retail value rsp	AP	FW	SW
Store-Based Retailing	Data removed from sample		
- Grocery Retailers			
-- Modern Grocery Retailers			
--- Convenience Stores			
--- Discounters			
--- Forecourt Retailers			

- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Non-Grocery Specialists
- Apparel and Footwear Specialist Retailers
- Leisure and Personal Goods Specialist Retailers
- Sports goods stores
- Other Leisure and Personal Goods Specialist Apparel Retailers
- Other Non-Grocery Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Key: AP = apparel; FW = footwear; SW = Sportswear

Table 9 Forecast Sales of Apparel and Footwear by Category: Volume 2020-2025

mn units

	2020	2021	2022	2023	2024	2025
Apparel	Data removed from sample					
Footwear						
Apparel and Footwear						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note: Sportswear volume not researched

Table 10 Forecast Sales of Apparel and Footwear by Category: Value 2020-2025

KRW billion

	2020	2021	2022	2023	2024	2025
Apparel	Data removed from sample					
Footwear						
Sportswear						
Apparel and Footwear						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2020-2025

% volume growth

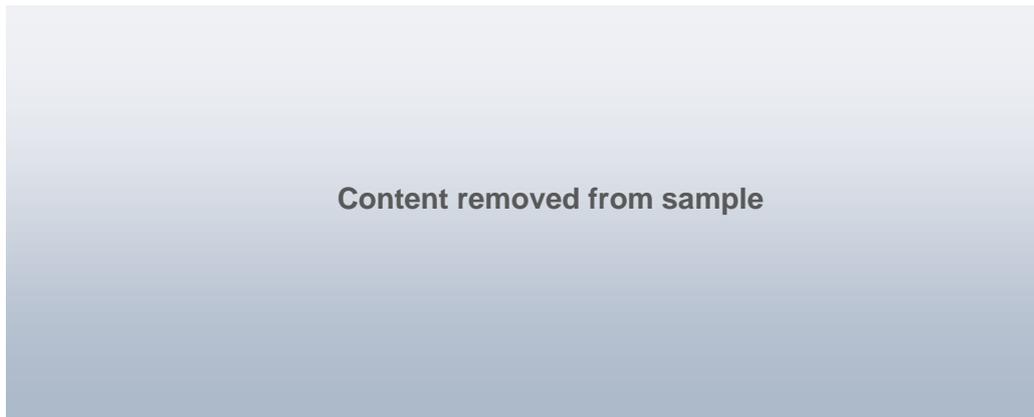
	2020/21	2020-25 CAGR	2020/25 Total
Apparel Footwear Apparel and Footwear	Data removed from sample		
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources		
Note:	Sportswear volume not researched		

Table 12 Forecast Sales of Apparel and Footwear by Category: % Value Growth 2020-2025

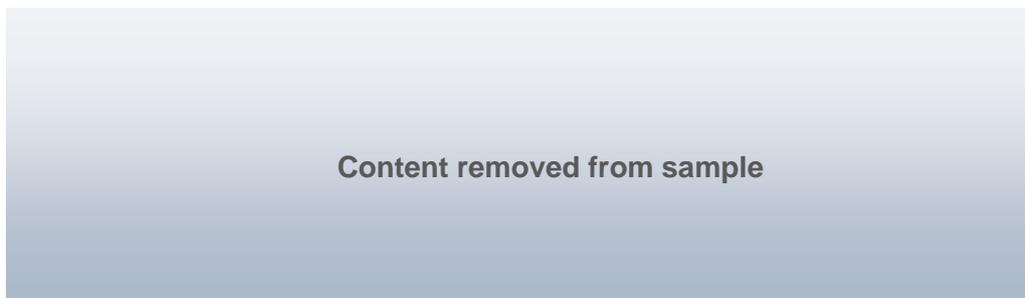
% constant value growth

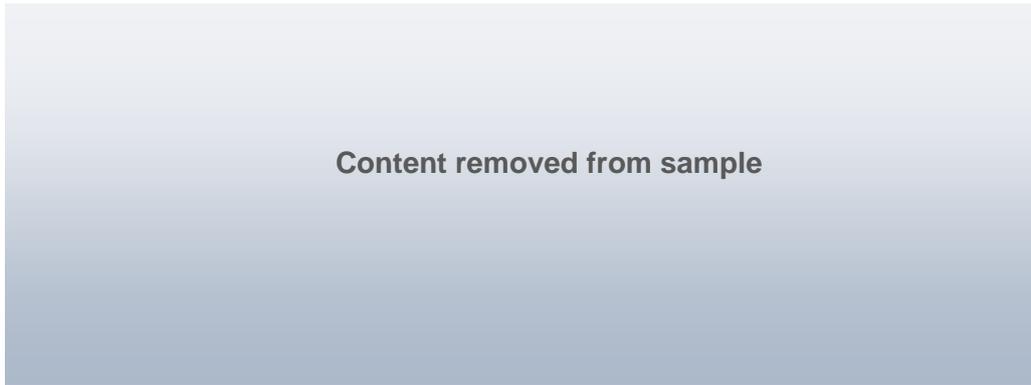
	2020/2021	2020-25 CAGR	2020/25 Total
Apparel Footwear Sportswear Apparel and Footwear	Data removed from sample		
Source:	Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources		

GLOBAL MACROECONOMIC ENVIRONMENT

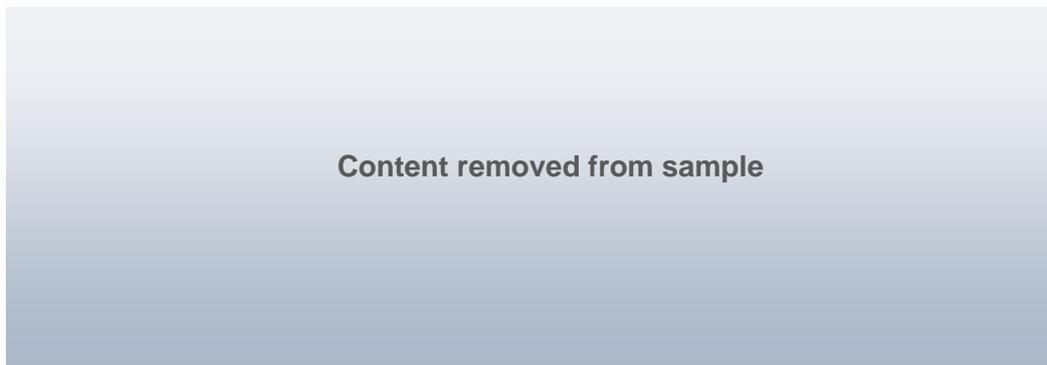


GLOBAL INDUSTRY ENVIRONMENT

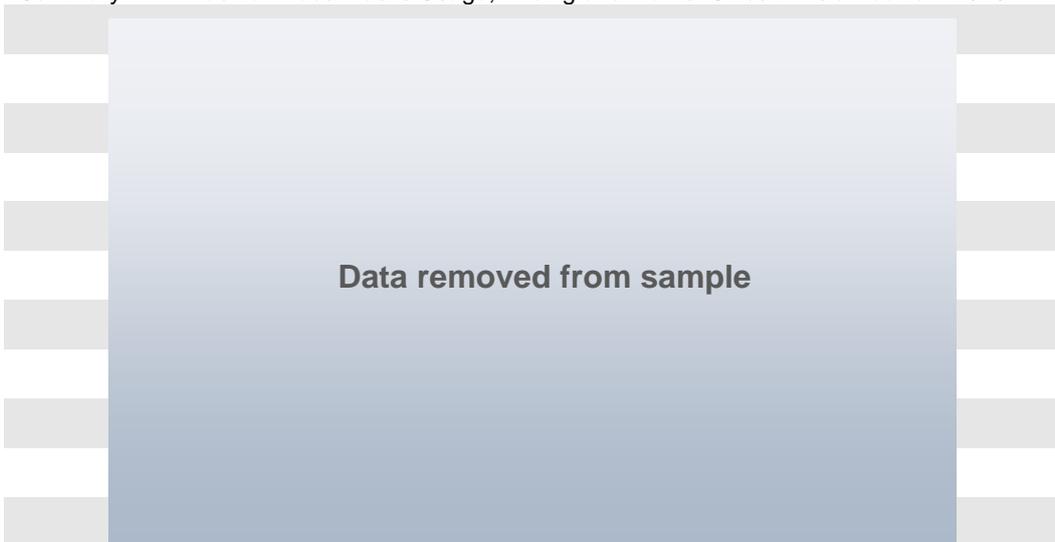




FACE MASKS



Summary 1 Fashion Face Masks Usage, Pricing and Market Sizes in Asia Pacific – 2020



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Source: Euromonitor International

DISCLAIMER

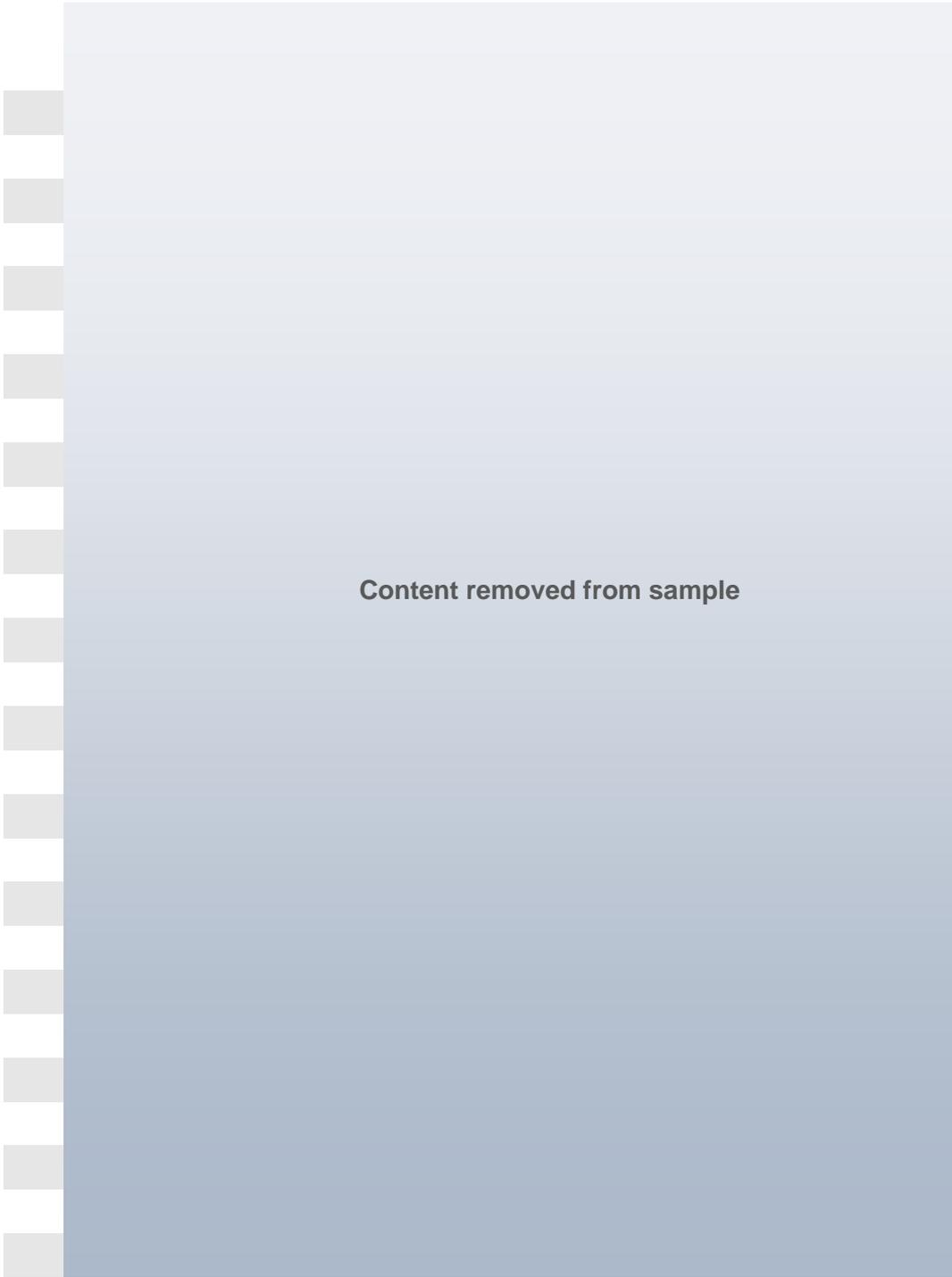
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SOURCES

Sources used during the research included the following:

Summary 2 Research Sources

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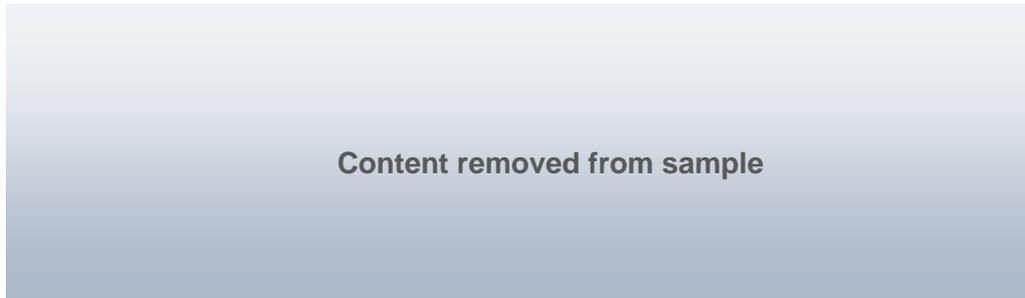


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Source: Euromonitor International

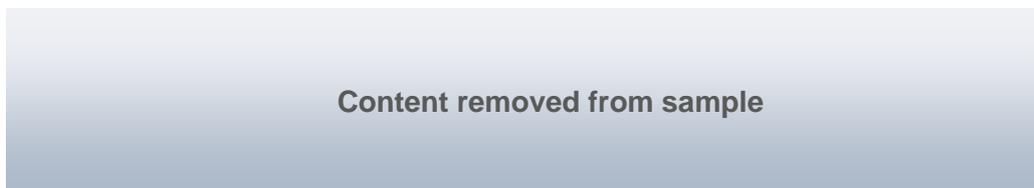
CHILDRENSWEAR IN SOUTH KOREA - CATEGORY ANALYSIS

KEY DATA FINDINGS



2020 IMPACT

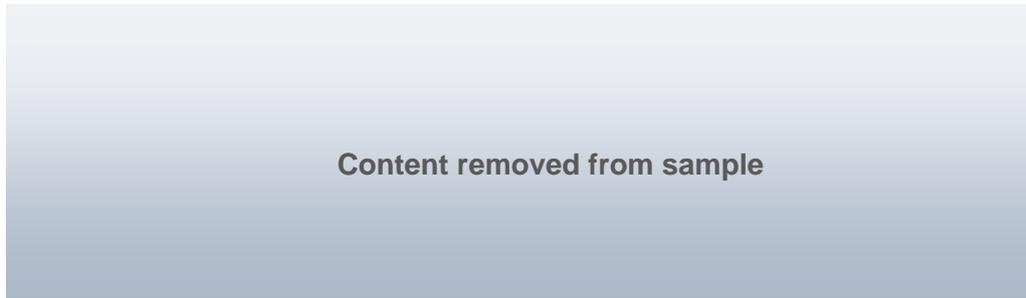
School closures due to COVID-19 mandates drastically lower demand in 2020



Internet retailing continues gaining momentum

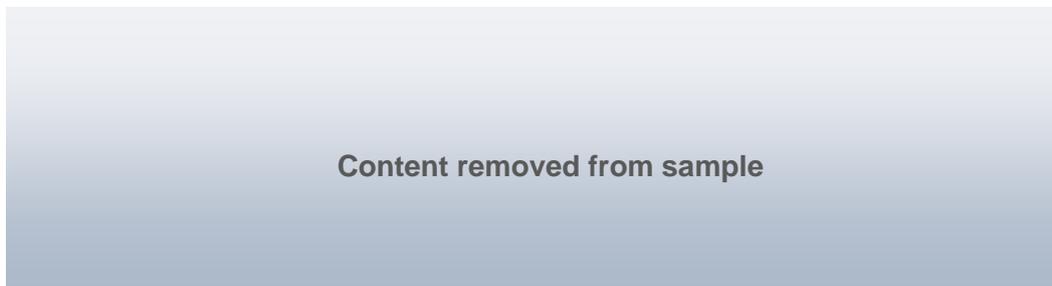


Low birth rate continues negatively impacting childrenswear in South Korea

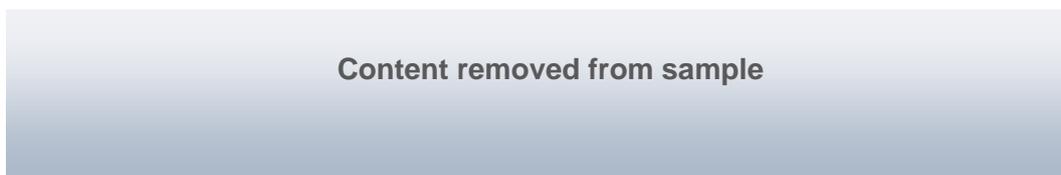


RECOVERY AND OPPORTUNITIES

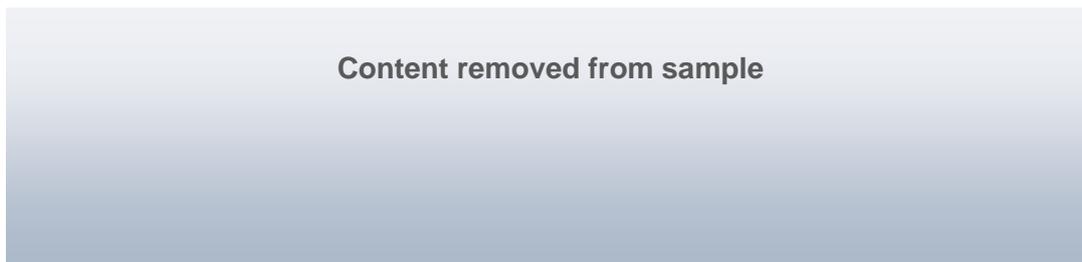
Baby and toddler wear will drive the recovery in the forecast period



Domestic brands will continue leading the way



Players will turn to premium offerings to offset the low birth rate



CATEGORY DATA

Table 13 Sales of Childrenswear by Category: Volume 2015-2020

mn units	2015	2016	2017	2018	2019	2020
Baby and Toddler Wear	Data removed from sample					
Boys' Apparel						
Girls' Apparel						
Childrenswear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 Sales of Childrenswear by Category: Value 2015-2020

KRW billion	2015	2016	2017	2018	2019	2020
Baby and Toddler Wear	Data removed from sample					
Boys' Apparel						
Girls' Apparel						
Childrenswear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Sales of Childrenswear by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Baby and Toddler Wear	Data removed from sample		
Boys' Apparel			
Girls' Apparel			
Childrenswear			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Sales of Childrenswear by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Baby and Toddler Wear	Data removed from sample		
Boys' Apparel			
Girls' Apparel			
Childrenswear			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 NBO Company Shares of Childrenswear: % Value 2016-2020

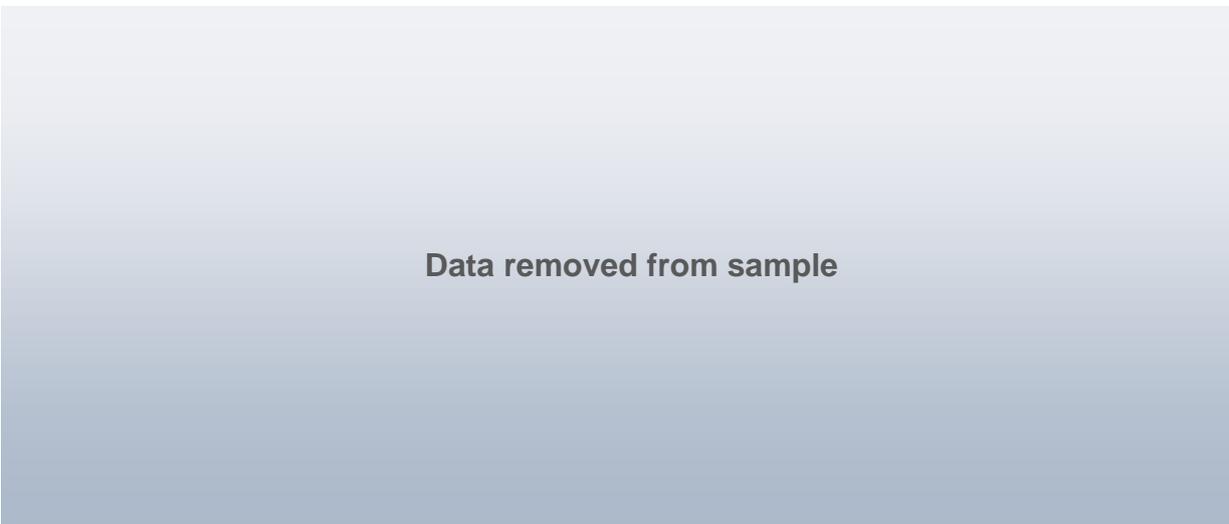
% retail value rsp Company	2016	2017	2018	2019	2020
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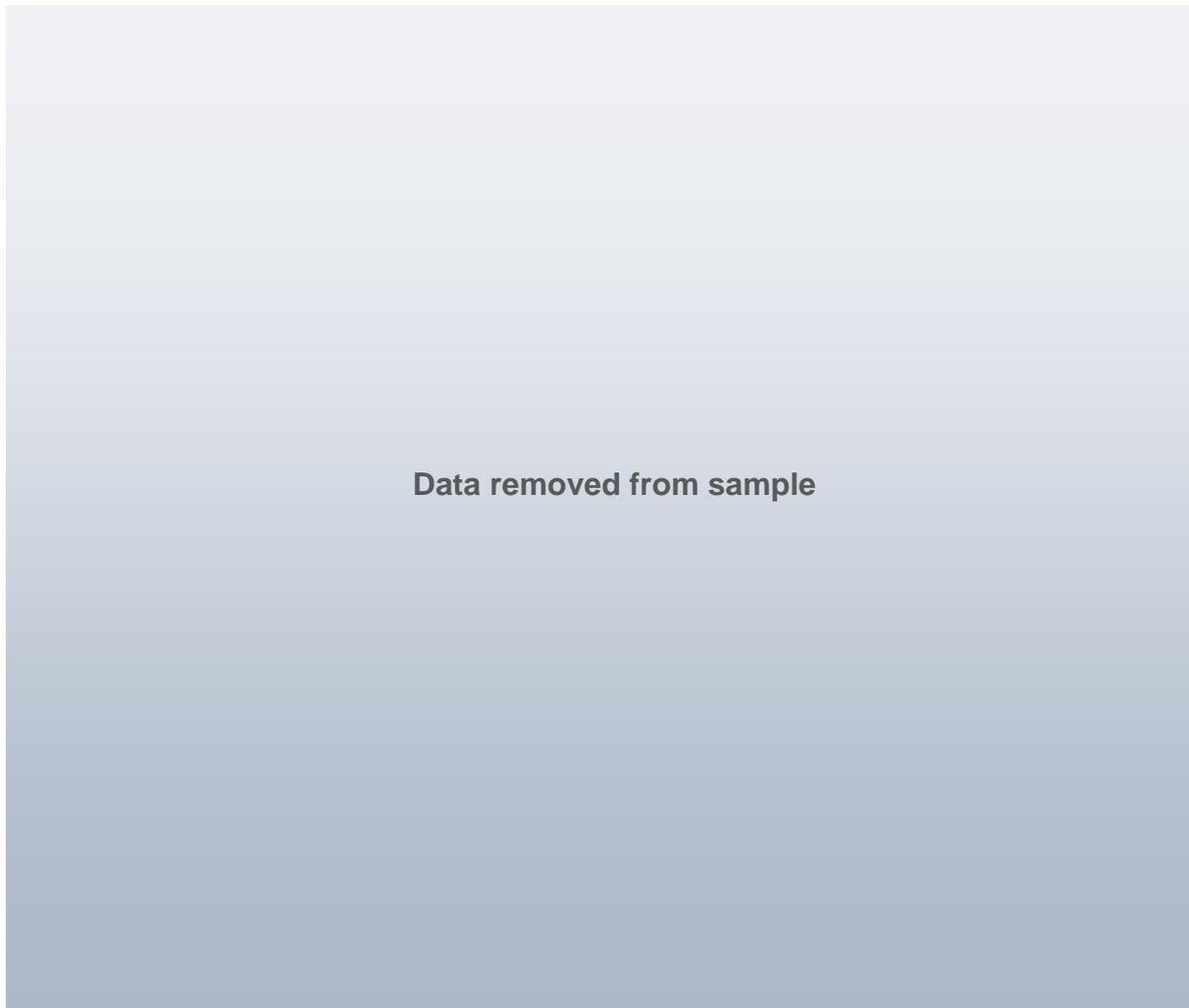


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 18 LBN Brand Shares of Childrenswear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 19 Forecast Sales of Childrenswear by Category: Volume 2020-2025

mn units

	2020	2021	2022	2023	2024	2025
Baby and Toddler Wear	Data removed from sample					
Boys' Apparel						
Girls' Apparel						
Childrenswear						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 20 Forecast Sales of Childrenswear by Category: Value 2020-2025

KRW billion

	2020	2021	2022	2023	2024	2025
Baby and Toddler Wear	Data removed from sample					

Boys' Apparel
Girls' Apparel
Childrenswear

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 21 Forecast Sales of Childrenswear by Category: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

Baby and Toddler Wear
Boys' Apparel
Girls' Apparel
Childrenswear

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Childrenswear by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

Baby and Toddler Wear
Boys' Apparel
Girls' Apparel
Childrenswear

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

APPAREL ACCESSORIES IN SOUTH KOREA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Demand for fashion face masks surges in 2020 supporting growth of apparel accessories

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Demand for luxury apparel accessories continues developing

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Rise of outdoor activities benefits hats/caps

Content removed from sample

Content removed from sample

RECOVERY AND OPPORTUNITIES

Slower growth expected in the forecast period

Content removed from sample

Hats/caps will continue to gain popularity

Content removed from sample

Luxury brands will continue driving sales

Content removed from sample

CATEGORY DATA

Table 23 Sales of Apparel Accessories by Category: Volume 2015-2020

mn units

	2015	2016	2017	2018	2019	2020
Belts	Data removed from sample					
Gloves						
Hats/Caps						
Scarves						
Ties						
Other Apparel Accessories						
Apparel Accessories						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 24 Sales of Apparel Accessories by Category: Value 2015-2020

KRW billion	2015	2016	2017	2018	2019	2020
Belts	Data removed from sample					
Gloves						
Hats/Caps						
Scarves						
Ties						
Other Apparel Accessories						
Apparel Accessories						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 25 Sales of Apparel Accessories by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Belts	Data removed from sample		
Gloves			
Hats/Caps			
Scarves			
Ties			
Other Apparel Accessories			
Apparel Accessories			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

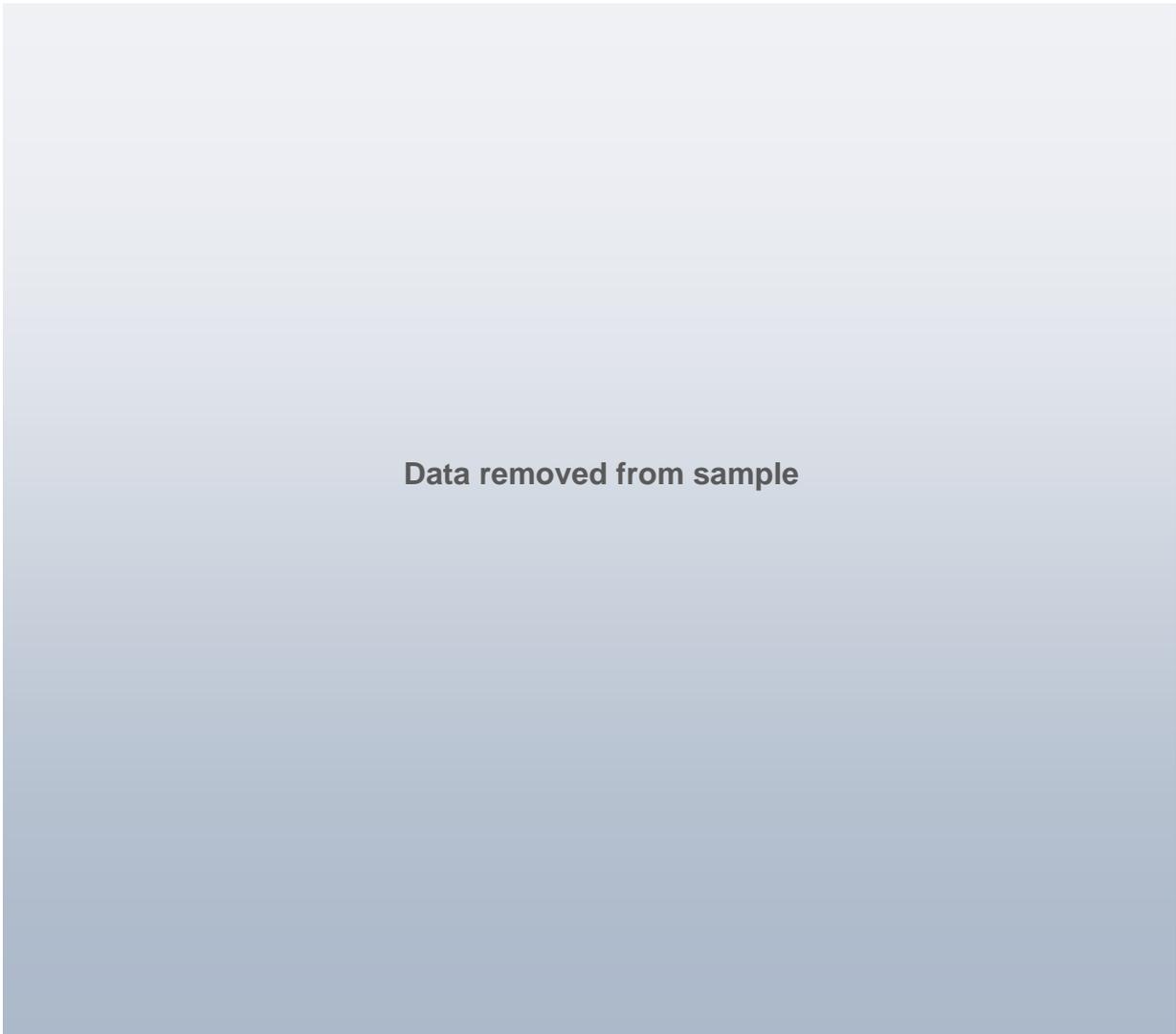
Table 26 Sales of Apparel Accessories by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Belts	Data removed from sample		
Gloves			
Hats/Caps			
Scarves			
Ties			
Other Apparel Accessories			
Apparel Accessories			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27 NBO Company Shares of Apparel Accessories: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
	Data removed from sample				

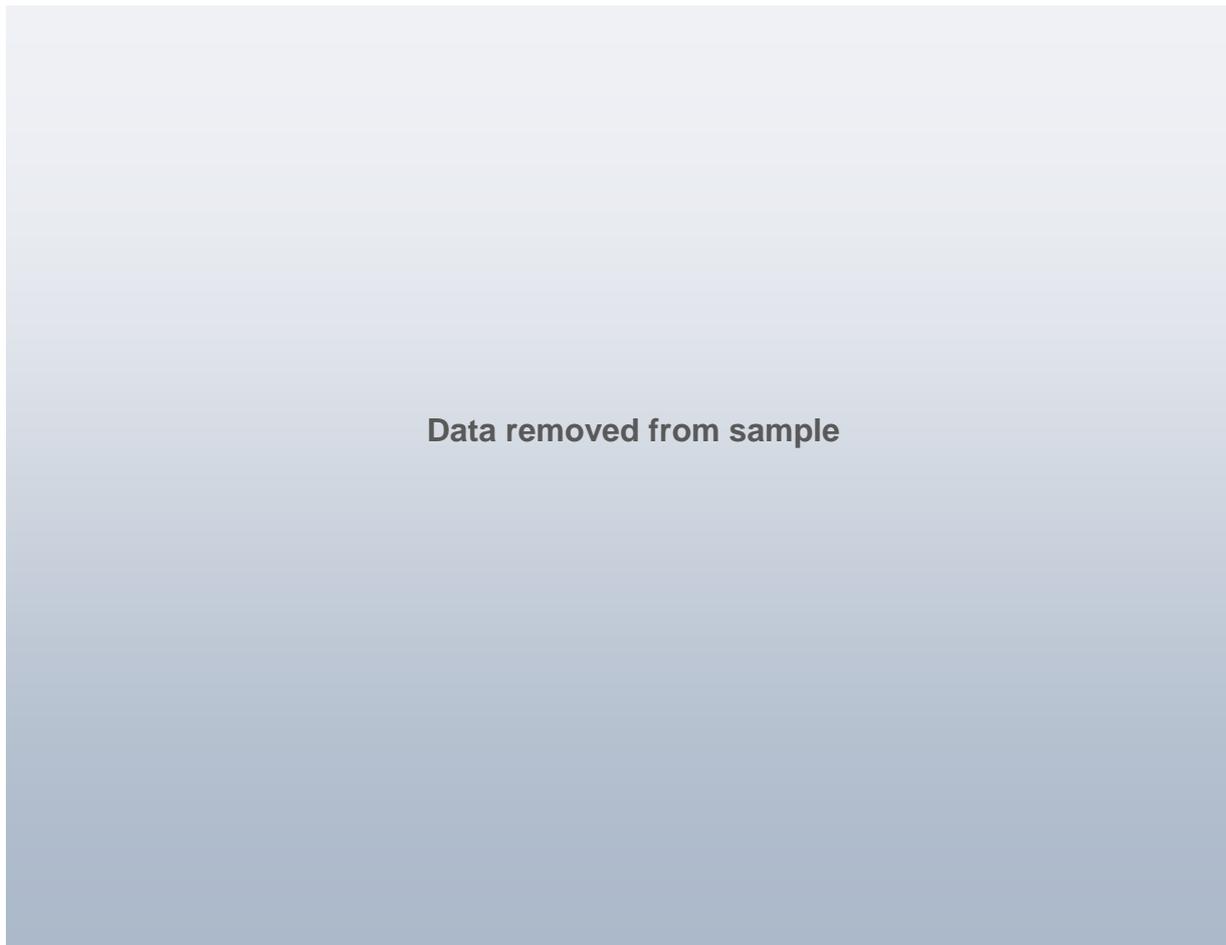


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 28 LBN Brand Shares of Apparel Accessories: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 29 Forecast Sales of Apparel Accessories by Category: Volume 2020-2025

mn units

	2020	2021	2022	2023	2024	2025
Belts	Data removed from sample					
Gloves						
Hats/Caps						
Scarves						
Ties						
Other Apparel Accessories						
Apparel Accessories						

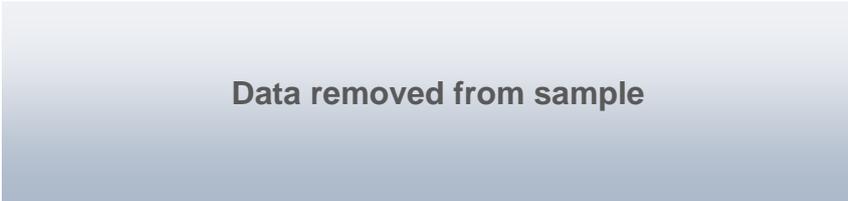
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 30 Forecast Sales of Apparel Accessories by Category: Value 2020-2025

KRW billion

	2020	2021	2022	2023	2024	2025

Belts
 Gloves
 Hats/Caps
 Scarves
 Ties
 Other Apparel Accessories
 Apparel Accessories



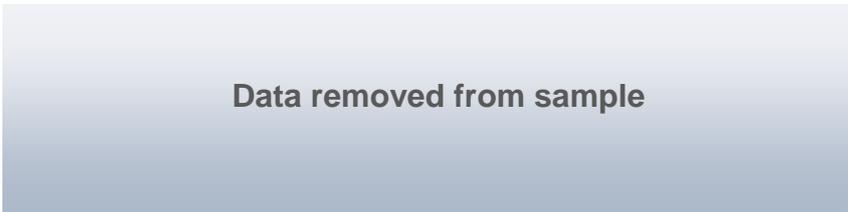
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 31 Forecast Sales of Apparel Accessories by Category: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

Belts
 Gloves
 Hats/Caps
 Scarves
 Ties
 Other Apparel Accessories
 Apparel Accessories



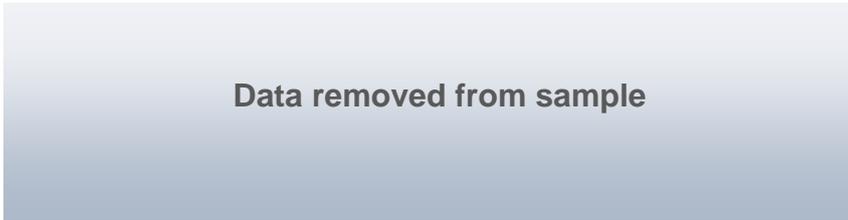
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 32 Forecast Sales of Apparel Accessories by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

Belts
 Gloves
 Hats/Caps
 Scarves
 Ties
 Other Apparel Accessories
 Apparel Accessories



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

MENSWEAR IN SOUTH KOREA - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2020 IMPACT

COVID-19 expedites the casualisation trend negatively impacting men's suits in 2020

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Luxury brands continue to attract young South Korean men

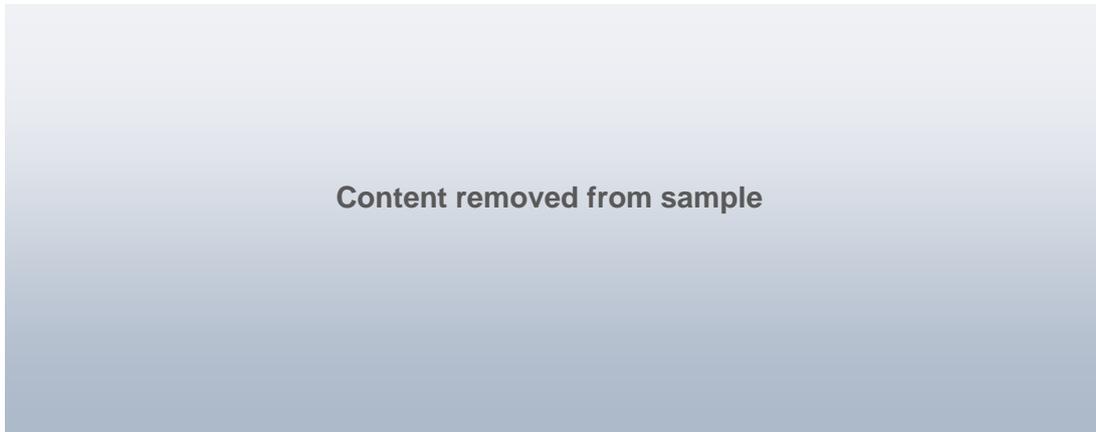
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Internet retailing gaining ground

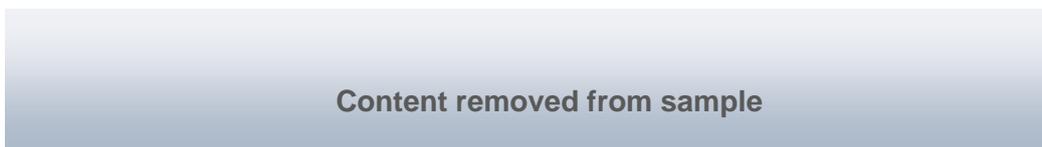
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RECOVERY AND OPPORTUNITIES

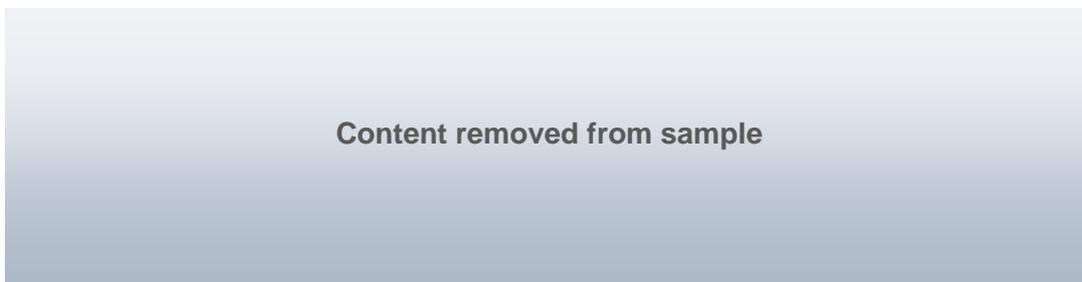
Online channels will drive recovery of menswear in the forecast period



Interesting launches expected by luxury brands



Boycott of Japanese goods will continue impacting menswear



CATEGORY DATA

Table 33 Sales of Menswear by Category: Volume 2015-2020

mn units	2015	2016	2017	2018	2019	2020
Men's Nightwear	Data removed from sample					
Men's Outerwear						
Men's Jeans						
- Economy Men's Jeans						
- Standard Men's Jeans						
- Premium Men's Jeans	Data removed from sample					

- Super Premium Men's Jeans
- Men's Outerwear (Excl Jeans)
- Men's Jackets and Coats
- Men's Jumpers
- Men's Shirts
- Men's Shorts and Trousers
- Men's Suits
- Men's Tops
- Other Men's Outerwear
- Men's Swimwear
- Men's Underwear
- Menswear



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 34 Sales of Menswear by Category: Value 2015-2020

KRW billion

	2015	2016	2017	2018	2019	2020
Men's Nightwear	Data removed from sample					
Men's Outerwear						
Men's Jeans						
- Economy Men's Jeans						
- Standard Men's Jeans						
- Premium Men's Jeans						
- Super Premium Men's Jeans						
Men's Outerwear (Excl Jeans)						
- Men's Jackets and Coats						
- Men's Jumpers						
- Men's Shirts						
- Men's Shorts and Trousers						
- Men's Suits						
- Men's Tops						
- Other Men's Outerwear						
Men's Swimwear						
Men's Underwear						
Menswear						

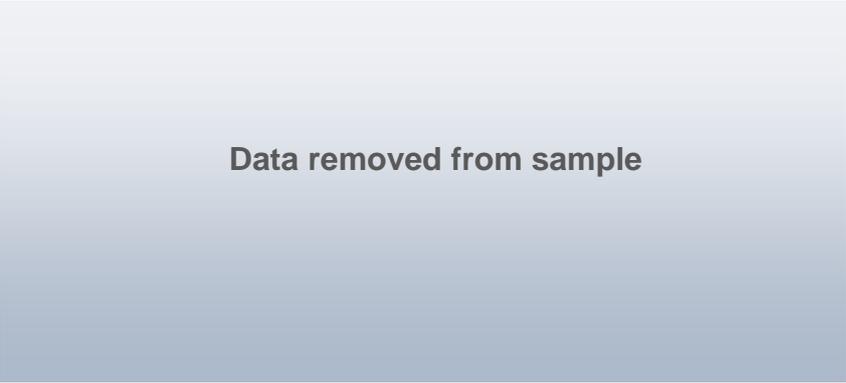
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 35 Sales of Menswear by Category: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Men's Nightwear	Data removed from sample		
Men's Outerwear			
Men's Jeans			
- Economy Men's Jeans			
- Standard Men's Jeans			

- Premium Men's Jeans
- Super Premium Men's Jeans
- Men's Outerwear (Excl Jeans)
- Men's Jackets and Coats
- Men's Jumpers
- Men's Shirts
- Men's Shorts and Trousers
- Men's Suits
- Men's Tops
- Other Men's Outerwear
- Men's Swimwear
- Men's Underwear
- Menswear



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 36 Sales of Menswear by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Men's Nightwear			
Men's Outerwear			
Men's Jeans			
- Economy Men's Jeans			
- Standard Men's Jeans			
- Premium Men's Jeans			
- Super Premium Men's Jeans			
Men's Outerwear (Excl Jeans)			
- Men's Jackets and Coats			
- Men's Jumpers			
- Men's Shirts			
- Men's Shorts and Trousers			
- Men's Suits			
- Men's Tops			
- Other Men's Outerwear			
Men's Swimwear			
Men's Underwear			
Menswear			

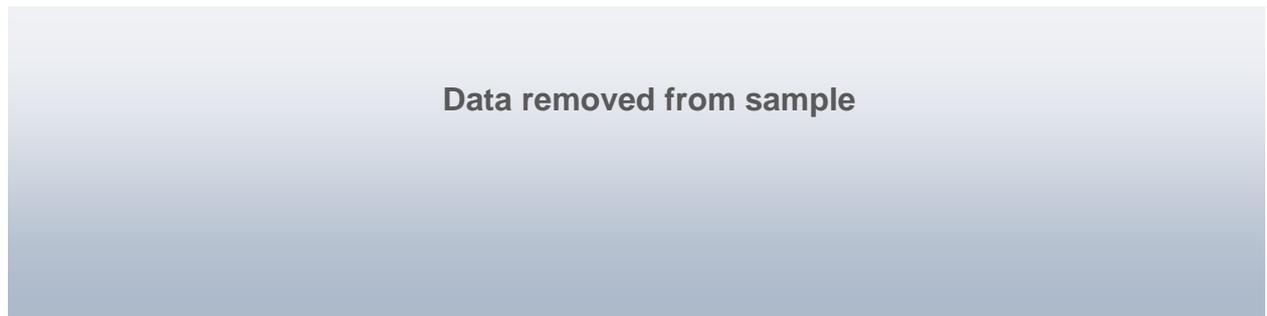


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 37 NBO Company Shares of Menswear: % Value 2016-2020

% retail value rsp

Company 2016 2017 2018 2019 2020

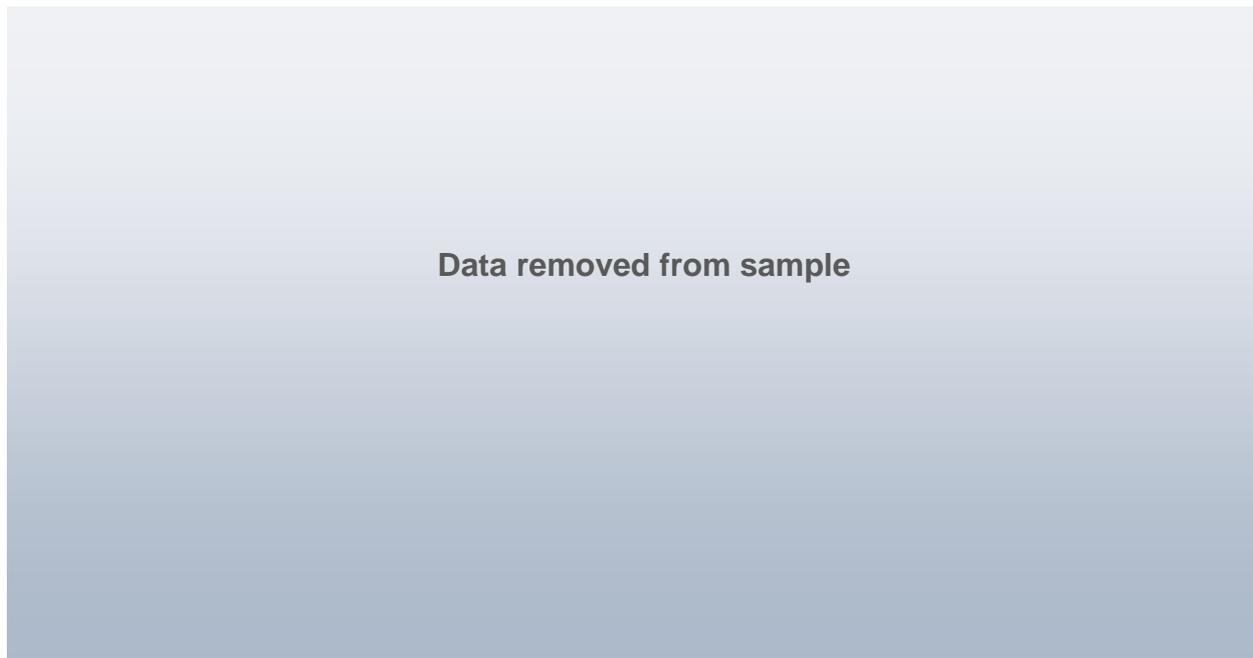




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 38 LBN Brand Shares of Menswear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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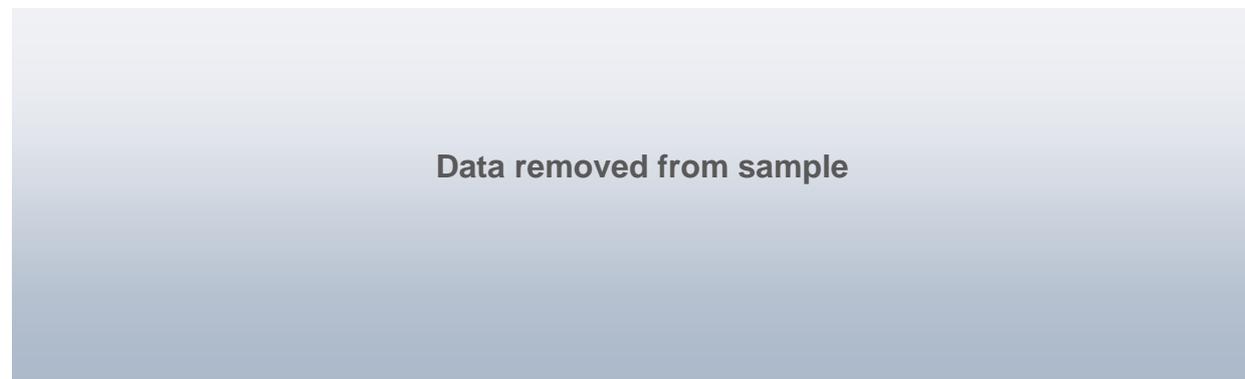




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 39 NBO Company Shares of Men's Nightwear: % Value 2016-2020

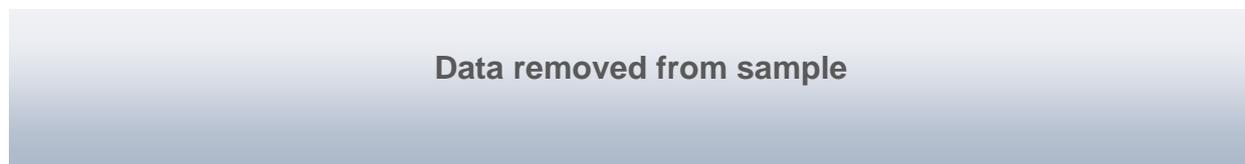
% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 40 LBN Brand Shares of Men's Nightwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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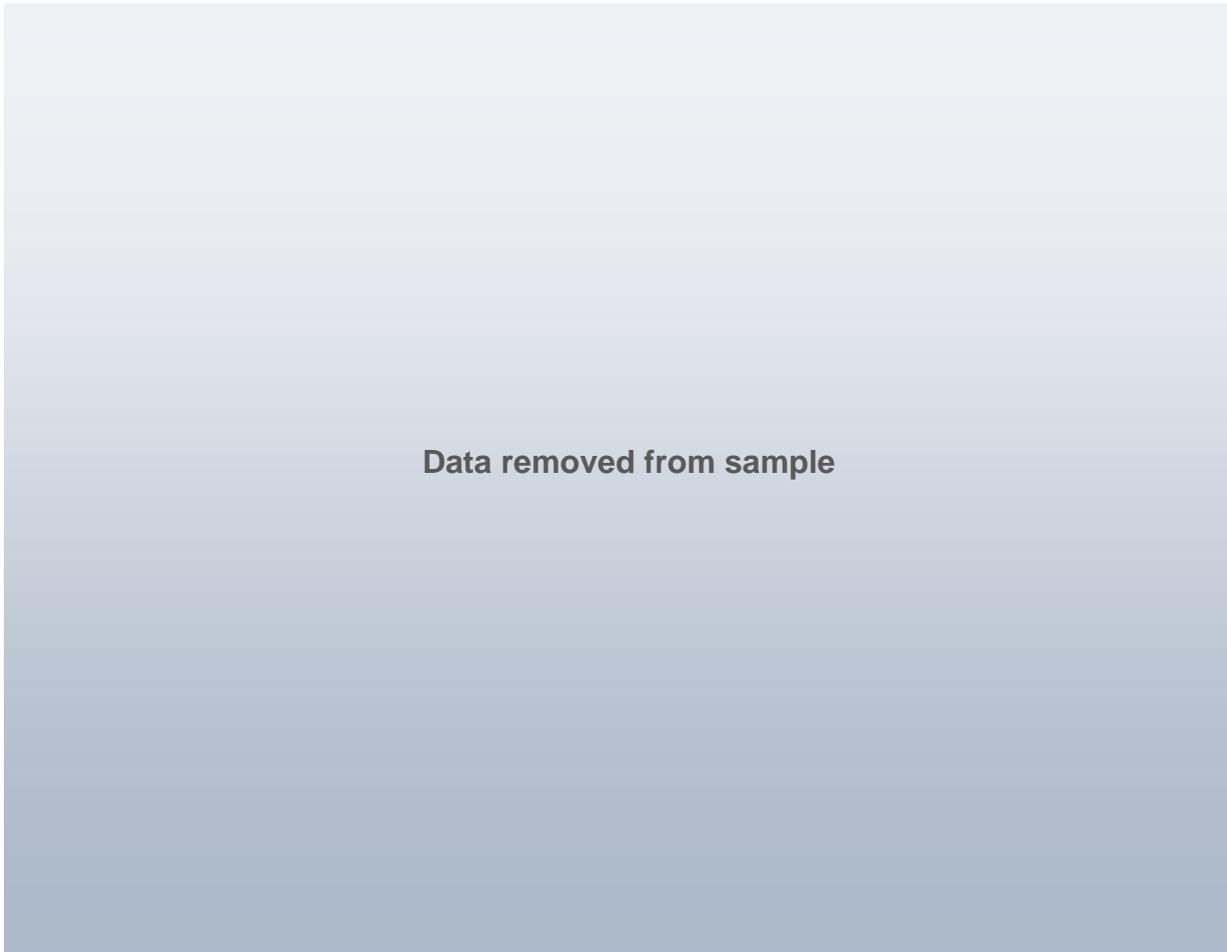




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 41 NBO Company Shares of Men's Outerwear: % Value 2016-2020

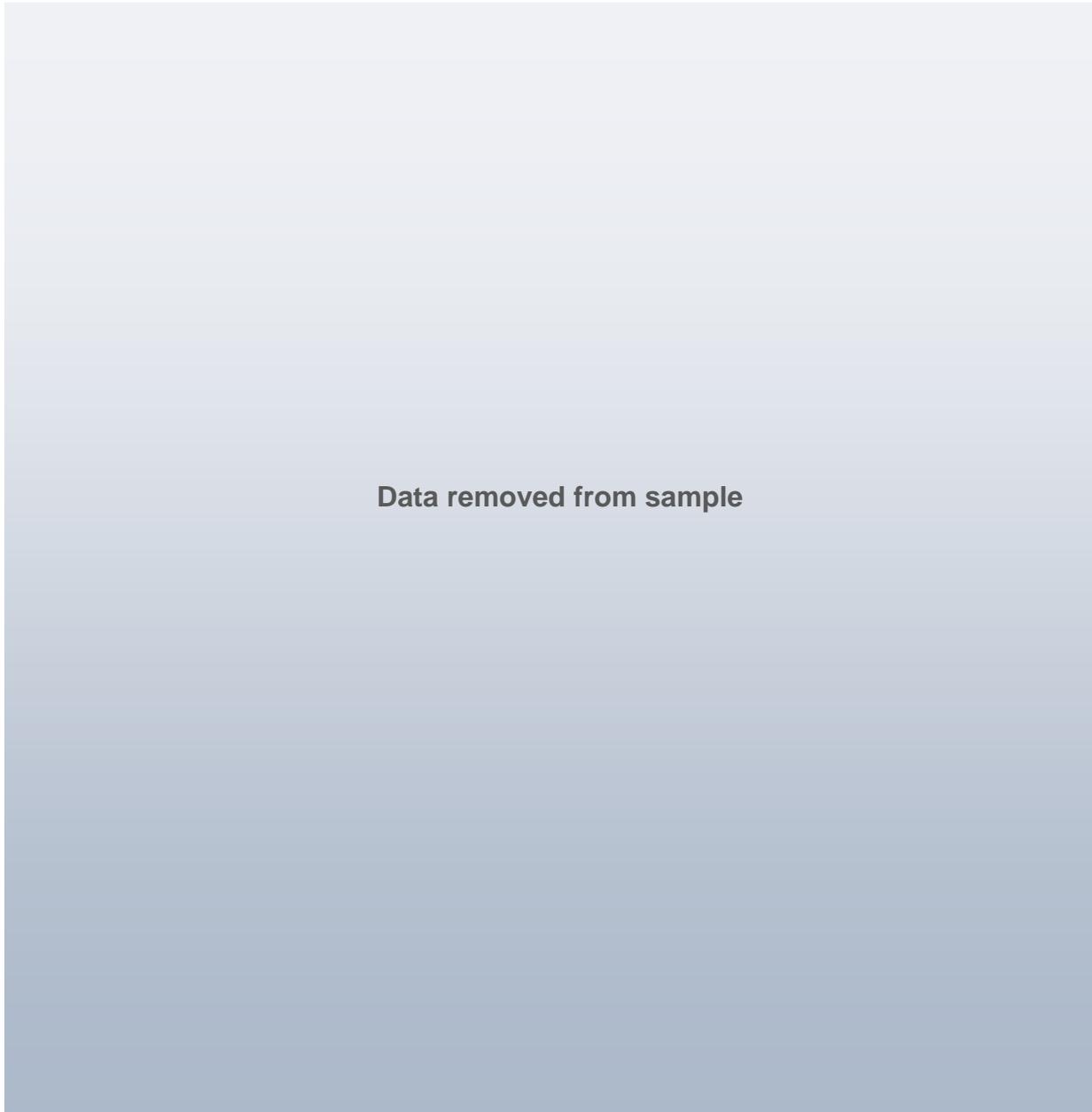
% retail value rsp Company	2016	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 42 LBN Brand Shares of Men's Outerwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 43 NBO Company Shares of Men’s Swimwear: % Value 2016-2020

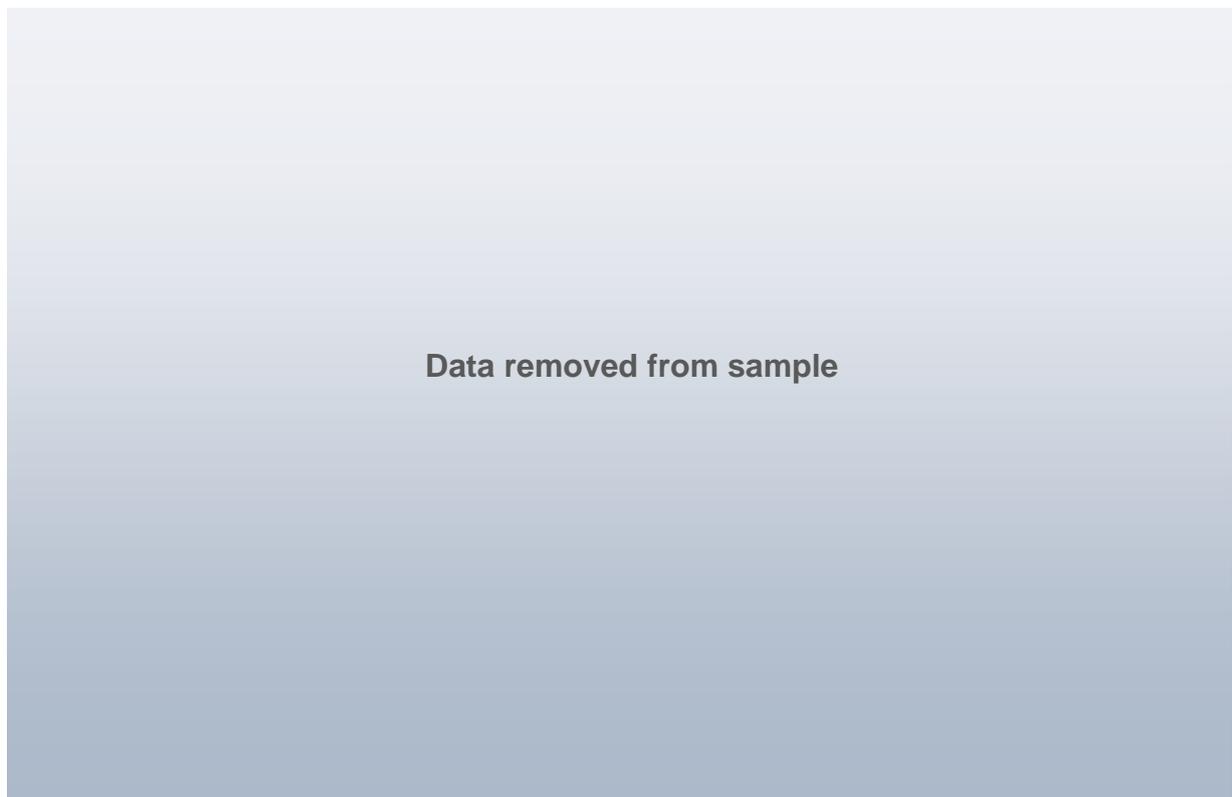
% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 44 LBN Brand Shares of Men’s Swimwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 45 NBO Company Shares of Men's Underwear: % Value 2016-2020

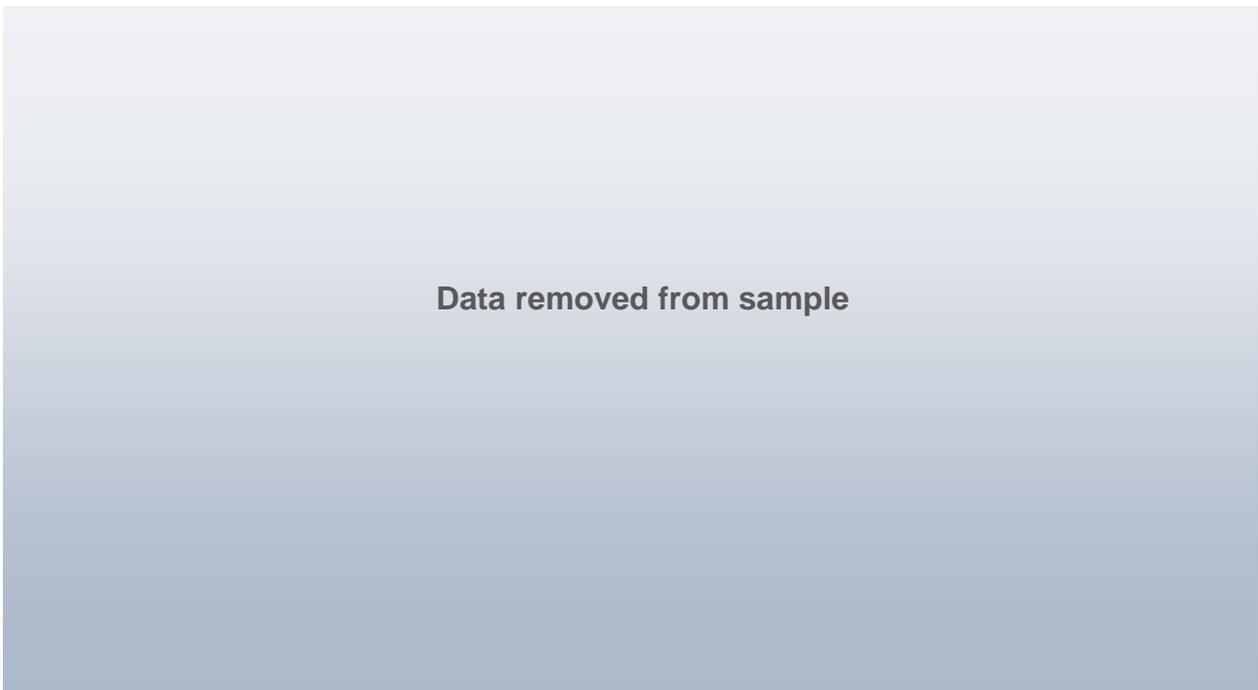
% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 46 LBN Brand Shares of Men's Underwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 47 Forecast Sales of Menswear by Category: Volume 2020-2025

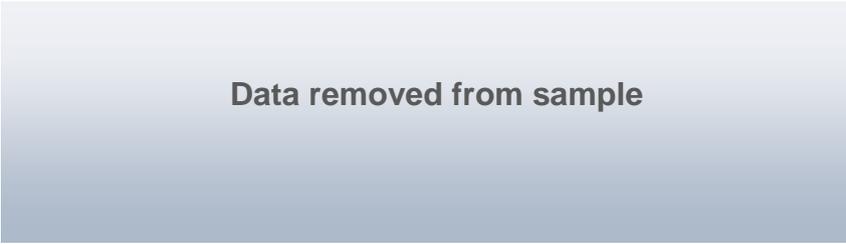
mn units	2020	2021	2022	2023	2024	2025
Men's Nightwear	Data removed from sample					
Men's Outerwear						
Men's Jeans						
- Economy Men's Jeans						
- Standard Men's Jeans						
- Premium Men's Jeans						
- Super Premium Men's Jeans						
Men's Outerwear (Excl Jeans)						
- Men's Jackets and Coats						
- Men's Jumpers						
- Men's Shirts						
- Men's Shorts and Trousers						
- Men's Suits						
- Men's Tops						
- Other Men's Outerwear						
Men's Swimwear						
Men's Underwear						
Menswear						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 48 Forecast Sales of Menswear by Category: Value 2020-2025

KRW billion	2020	2021	2022	2023	2024	2025
Men's Nightwear	Data removed from sample					
Men's Outerwear						
Men's Jeans						
- Economy Men's Jeans						
- Standard Men's Jeans						
- Premium Men's Jeans						
- Super Premium Men's Jeans						
Men's Outerwear (Excl Jeans)						
- Men's Jackets and Coats						
- Men's Jumpers						

- Men's Shirts
- Men's Shorts and Trousers
- Men's Suits
- Men's Tops
- Other Men's Outerwear
- Men's Swimwear
- Men's Underwear
- Menswear



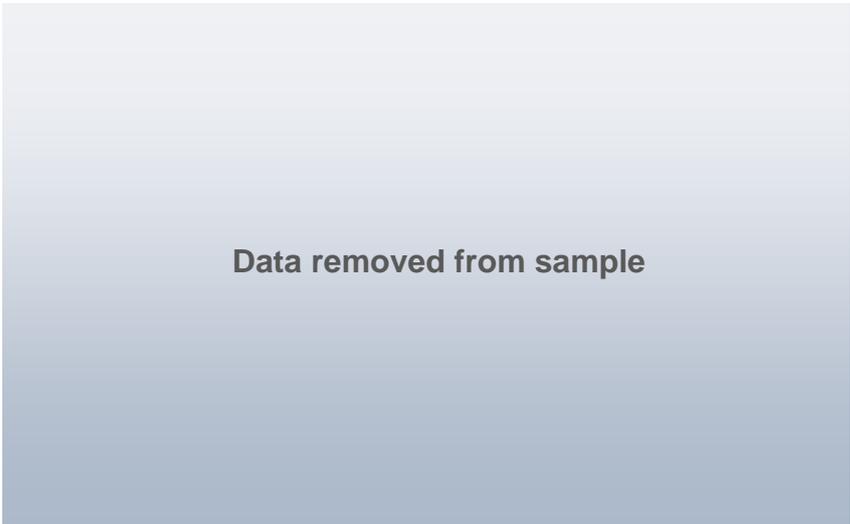
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 49 Forecast Sales of Menswear by Category: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

- Men's Nightwear
- Men's Outerwear
- Men's Jeans
 - Economy Men's Jeans
 - Standard Men's Jeans
 - Premium Men's Jeans
 - Super Premium Men's Jeans
- Men's Outerwear (Excl Jeans)
 - Men's Jackets and Coats
 - Men's Jumpers
 - Men's Shirts
 - Men's Shorts and Trousers
 - Men's Suits
 - Men's Tops
 - Other Men's Outerwear
- Men's Swimwear
- Men's Underwear
- Menswear



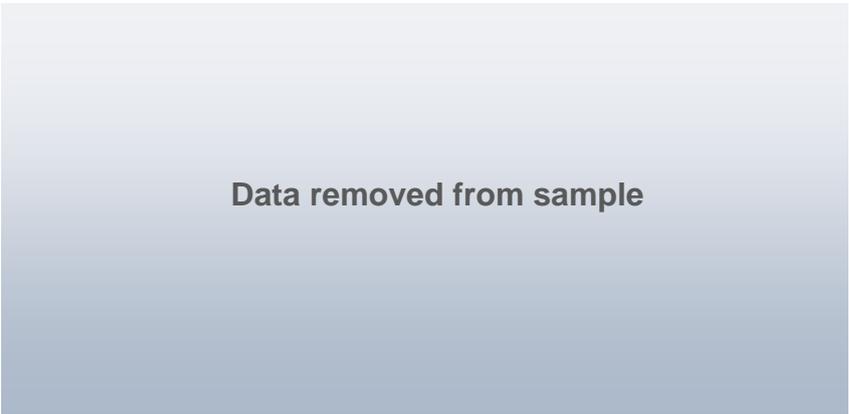
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 50 Forecast Sales of Menswear by Category: % Value Growth 2020-2025

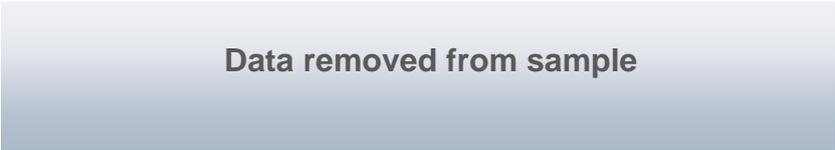
% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

- Men's Nightwear
- Men's Outerwear
- Men's Jeans
 - Economy Men's Jeans
 - Standard Men's Jeans
 - Premium Men's Jeans
 - Super Premium Men's Jeans
- Men's Outerwear (Excl Jeans)
 - Men's Jackets and Coats
 - Men's Jumpers
 - Men's Shirts
 - Men's Shorts and Trousers
 - Men's Suits
 - Men's Tops



- Other Men's Outerwear
Men's Swimwear
Men's Underwear
Menswear



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

WOMENSWEAR IN SOUTH KOREA - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2020 IMPACT

Changes in social and work behaviour limit demand for womenswear in 2020

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Trend of working out at home moderated the negative impact from COVID-19

Content removed from sample

Internet retailing booms

Content removed from sample

Content removed from sample

RECOVERY AND OPPORTUNITIES

Good prospects for recovery in the forecast period

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Fast fashion will struggle to recover

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Troubles ahead for Uniqlo

Content removed from sample

CATEGORY DATA

Table 51 Sales of Womenswear by Category: Volume 2015-2020

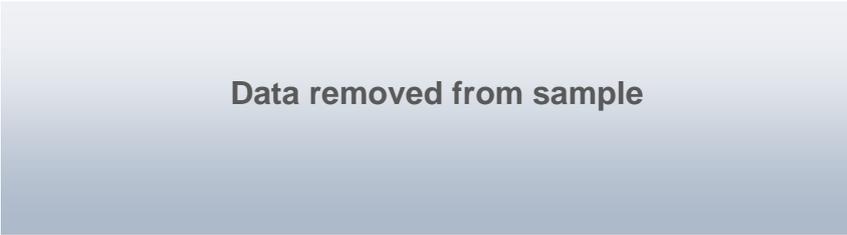
mn units	2015	2016	2017	2018	2019	2020
Women's Nightwear	Data removed from sample					
Women's Outerwear						
Women's Jeans						
- Economy Women's Jeans						
- Standard Women's Jeans						
- Premium Women's Jeans						
- Super Premium Women's Jeans						
Women's Outerwear (Excl Jeans)						
- Women's Dresses						
- Women's Jackets and Coats						
- Women's Jumpers						
- Women's Leggings						
- Women's Shirts and Blouses						
- Women's Shorts and Trousers						
- Women's Skirts						
- Women's Suits						
- Women's Tops						
- Other Women's Outerwear						
Women's Swimwear						
Women's Underwear						
Womenswear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 52 Sales of Womenswear by Category: Value 2015-2020

KRW billion	2015	2016	2017	2018	2019	2020
Women's Nightwear	Data removed from sample					
Women's Outerwear						
Women's Jeans						
- Economy Women's Jeans						
- Standard Women's Jeans						
- Premium Women's Jeans						
- Super Premium Women's Jeans						
Women's Outerwear (Excl Jeans)						
- Women's Dresses						
- Women's Jackets and Coats						
- Women's Jumpers						
- Women's Leggings						
- Women's Shirts and Blouses						

- Women's Shorts and Trousers
- Women's Skirts
- Women's Suits
- Women's Tops
- Other Women's Outerwear
- Women's Swimwear
- Women's Underwear
- Womenswear



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 53 Sales of Womenswear by Category: % Volume Growth 2015-2020

% volume growth

2019/20 2015-20 CAGR 2015/20 Total

- Women's Nightwear
- Women's Outerwear
- Women's Jeans
 - Economy Women's Jeans
 - Standard Women's Jeans
 - Premium Women's Jeans
 - Super Premium Women's Jeans
- Women's Outerwear (Excl Jeans)
 - Women's Dresses
 - Women's Jackets and Coats
 - Women's Jumpers
 - Women's Leggings
 - Women's Shirts and Blouses
 - Women's Shorts and Trousers
 - Women's Skirts
 - Women's Suits
 - Women's Tops
 - Other Women's Outerwear
- Women's Swimwear
- Women's Underwear
- Womenswear



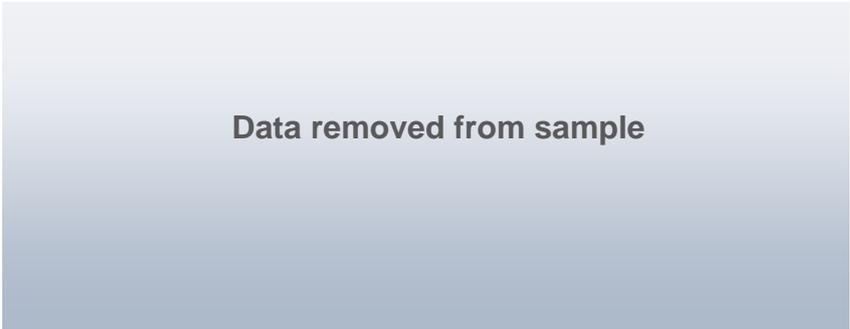
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 54 Sales of Womenswear by Category: % Value Growth 2015-2020

% current value growth

2019/20 2015-20 CAGR 2015/20 Total

- Women's Nightwear
- Women's Outerwear
- Women's Jeans
 - Economy Women's Jeans
 - Standard Women's Jeans
 - Premium Women's Jeans
 - Super Premium Women's Jeans
- Women's Outerwear (Excl Jeans)
 - Women's Dresses
 - Women's Jackets and Coats
 - Women's Jumpers



- Women's Leggings
- Women's Shirts and Blouses
- Women's Shorts and Trousers
- Women's Skirts
- Women's Suits
- Women's Tops
- Other Women's Outerwear
- Women's Swimwear
- Women's Underwear
- Womenswear

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 55 NBO Company Shares of Womenswear: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 56 LBN Brand Shares of Womenswear: % Value 2017-2020

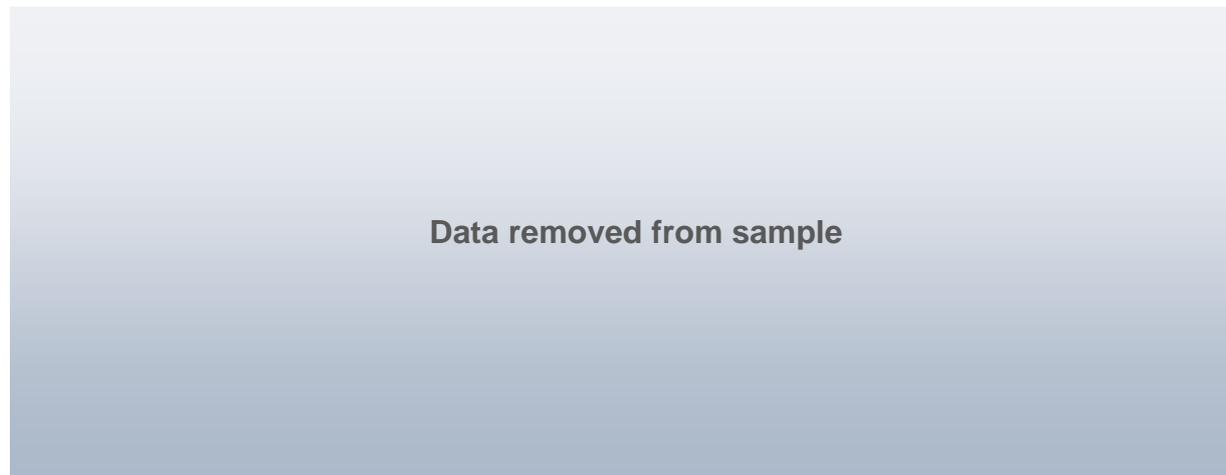
% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 57 NBO Company Shares of Women's Nightwear: % Value 2016-2020

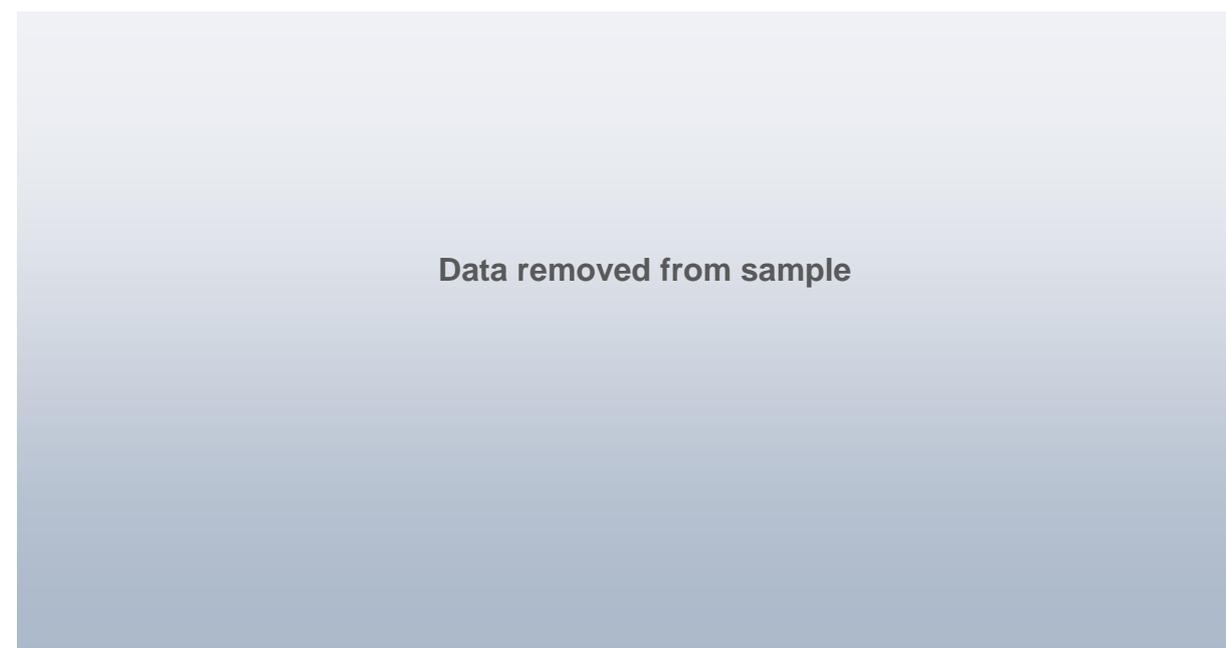
% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 58 LBN Brand Shares of Women's Nightwear: % Value 2017-2020

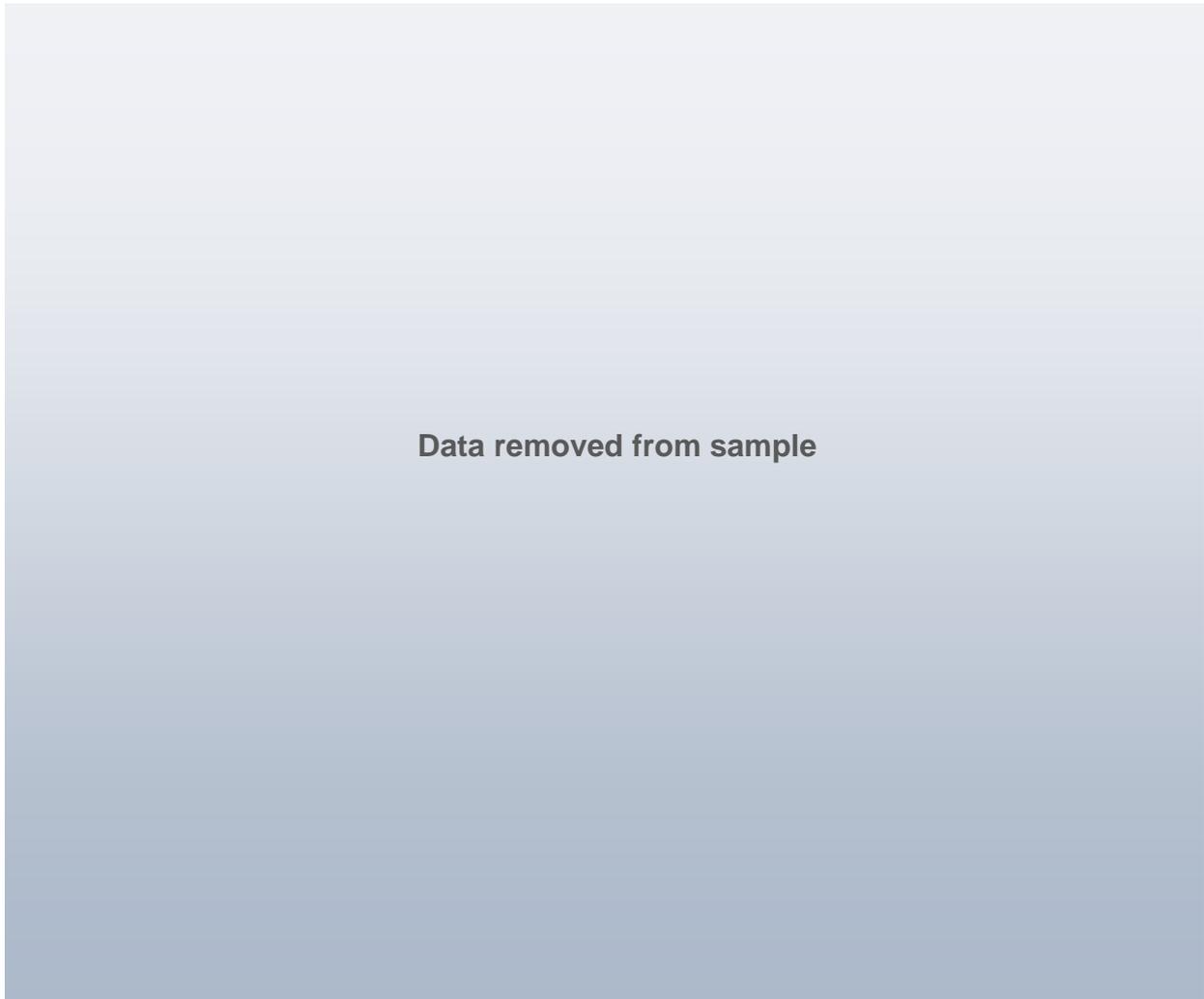
% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 59 NBO Company Shares of Women's Outerwear: % Value 2016-2020

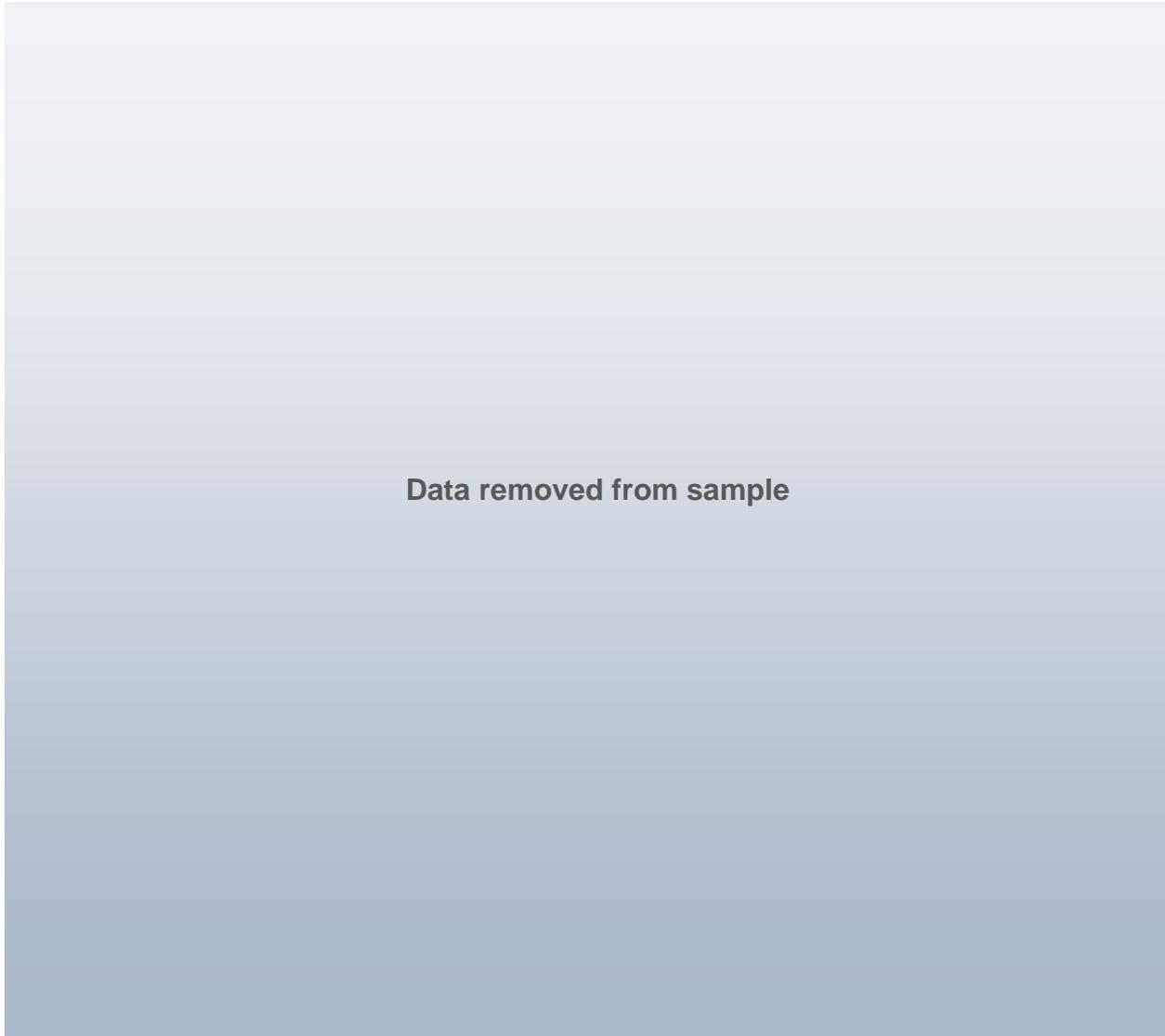
% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 60 LBN Brand Shares of Women's Outerwear: % Value 2017-2020

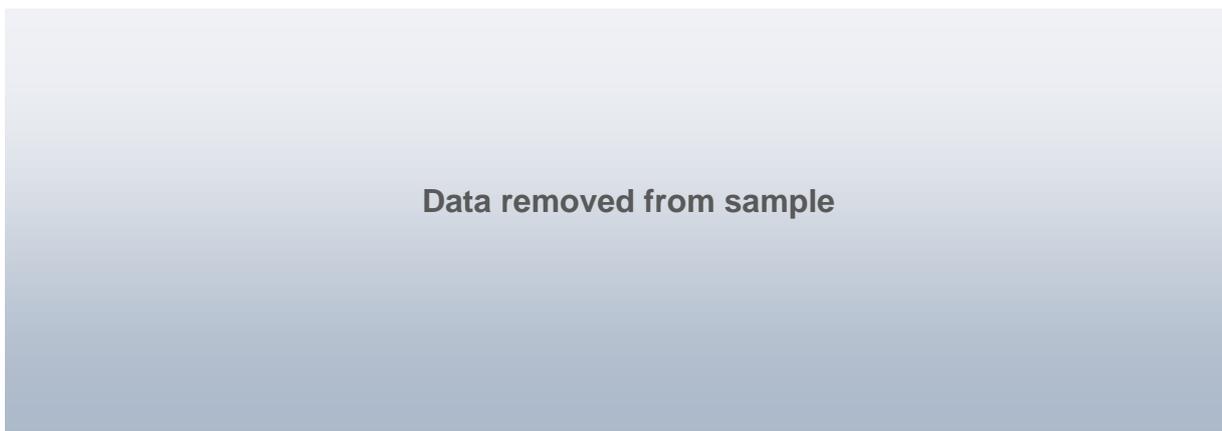
% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
-----------------------------------	---------------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 61 NBO Company Shares of Women's Swimwear: % Value 2016-2020

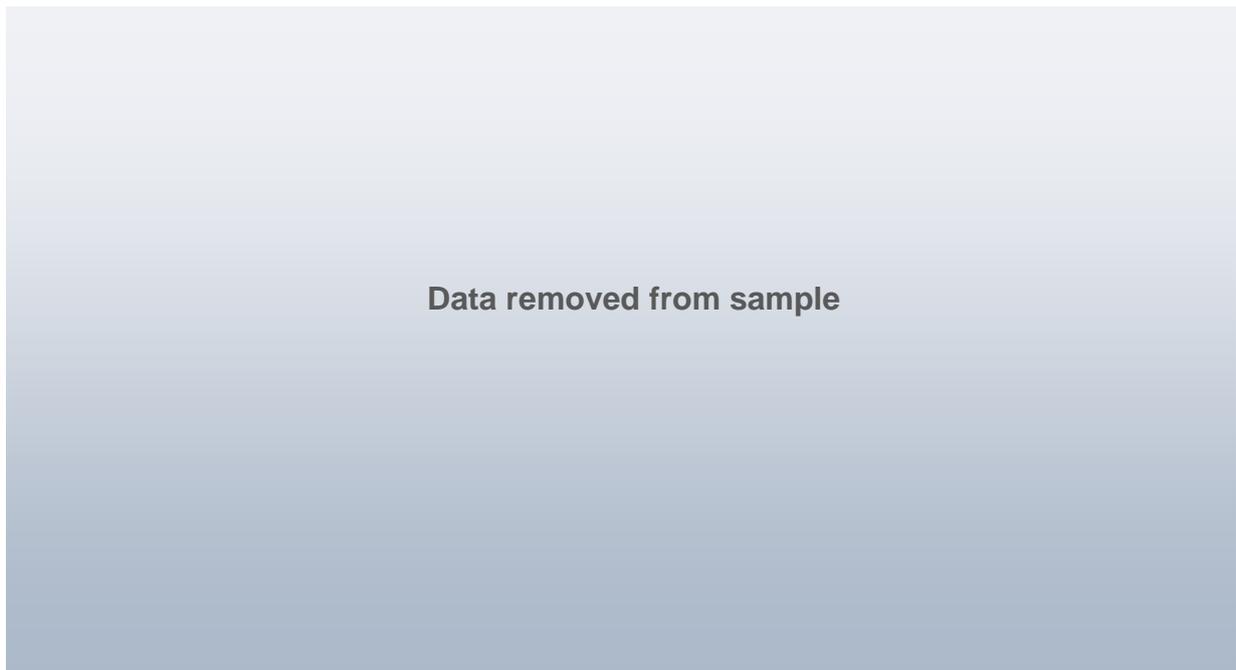
% retail value rsp Company	2016	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 62 LBN Brand Shares of Women's Swimwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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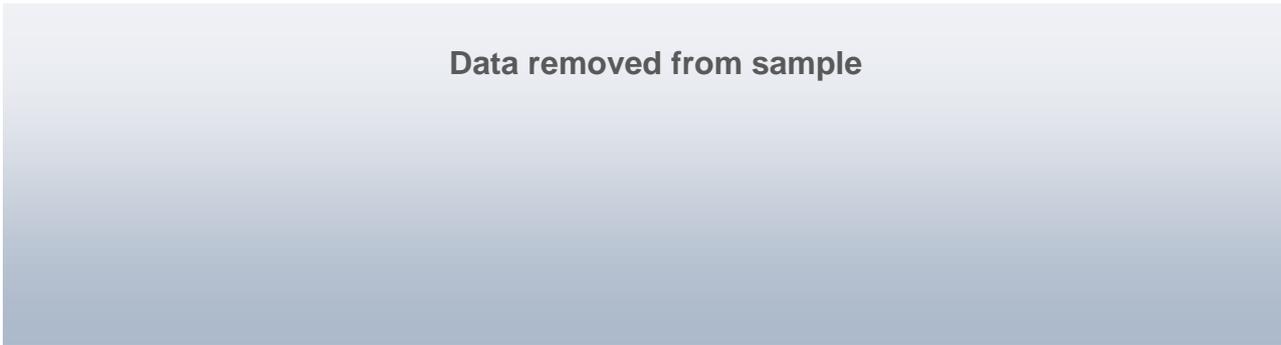


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 63 NBO Company Shares of Women's Underwear: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
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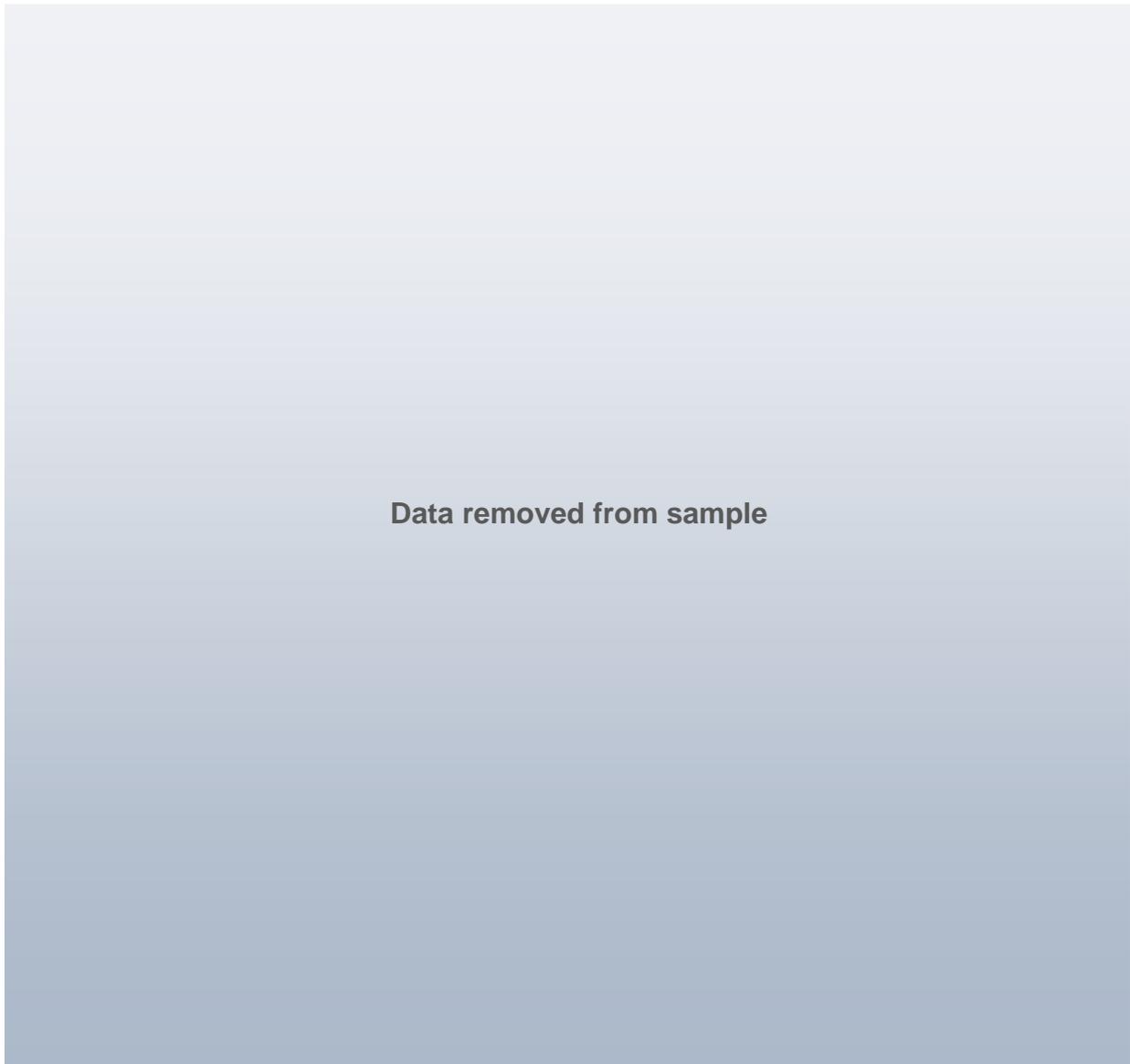




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 64 LBN Brand Shares of Women's Underwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 65 Forecast Sales of Womenswear by Category: Volume 2020-2025

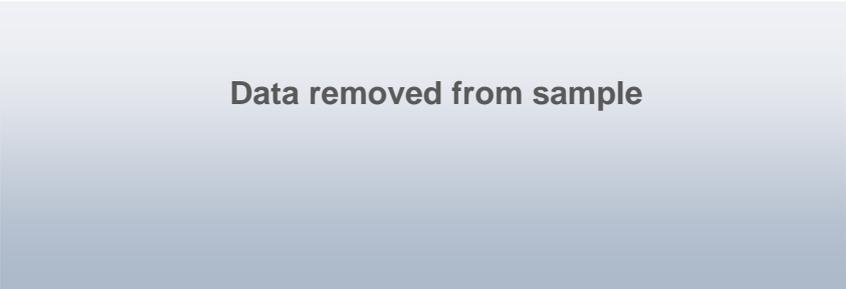
mn units	2020	2021	2022	2023	2024	2025
Women's Nightwear	Data removed from sample					
Women's Outerwear						
Women's Jeans						
- Economy Women's Jeans						
- Standard Women's Jeans						
- Premium Women's Jeans						
- Super Premium Women's Jeans						
Women's Outerwear (Excl Jeans)						
- Women's Dresses						
- Women's Jackets and Coats						
- Women's Jumpers						
- Women's Leggings						
- Women's Shirts and Blouses						
- Women's Shorts and Trousers						
- Women's Skirts						
- Women's Suits						
- Women's Tops						
- Other Women's Outerwear						
Women's Swimwear						
Women's Underwear						
Womenswear						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 66 Forecast Sales of Womenswear by Category: Value 2020-2025

KRW billion	2020	2021	2022	2023	2024	2025
Women's Nightwear	Data removed from sample					
Women's Outerwear						
Women's Jeans						
- Economy Women's Jeans						
- Standard Women's Jeans						
- Premium Women's Jeans						
- Super Premium Women's Jeans						
Women's Outerwear (Excl Jeans)						
- Women's Dresses						
- Women's Jackets and Coats						
- Women's Jumpers						
- Women's Leggings						

- Women's Shirts and Blouses
- Women's Shorts and Trousers
- Women's Skirts
- Women's Suits
- Women's Tops
- Other Women's Outerwear
- Women's Swimwear
- Women's Underwear
- Womenswear



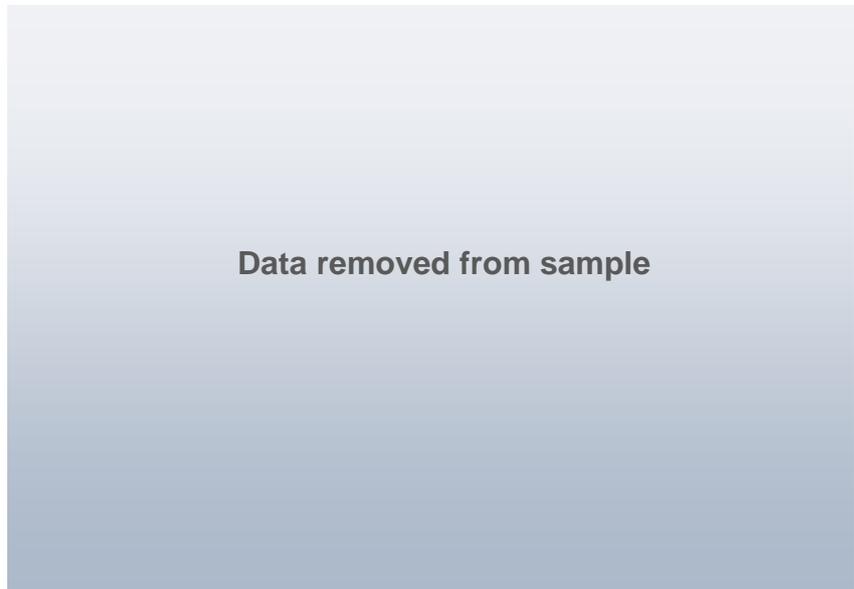
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 67 Forecast Sales of Womenswear by Category: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

- Women's Nightwear
- Women's Outerwear
- Women's Jeans
 - Economy Women's Jeans
 - Standard Women's Jeans
 - Premium Women's Jeans
 - Super Premium Women's Jeans
- Women's Outerwear (Excl Jeans)
- Women's Dresses
- Women's Jackets and Coats
- Women's Jumpers
- Women's Leggings
- Women's Shirts and Blouses
- Women's Shorts and Trousers
- Women's Skirts
- Women's Suits
- Women's Tops
- Other Women's Outerwear
- Women's Swimwear
- Women's Underwear
- Womenswear



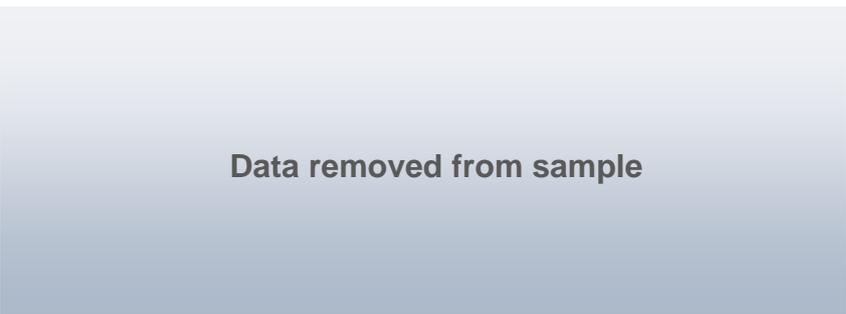
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 68 Forecast Sales of Womenswear by Category: % Value Growth 2020-2025

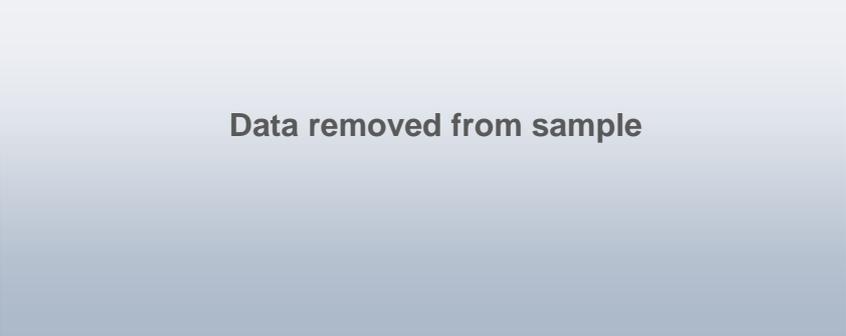
% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

- Women's Nightwear
- Women's Outerwear
- Women's Jeans
 - Economy Women's Jeans
 - Standard Women's Jeans
 - Premium Women's Jeans
 - Super Premium Women's Jeans
- Women's Outerwear (Excl Jeans)
- Women's Dresses



- Women's Jackets and Coats
- Women's Jumpers
- Women's Leggings
- Women's Shirts and Blouses
- Women's Shorts and Trousers
- Women's Skirts
- Women's Suits
- Women's Tops
- Other Women's Outerwear
- Women's Swimwear
- Women's Underwear
- Womenswear



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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

JEANS IN SOUTH KOREA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Jeans lose steam in 2020 due to other more comfortable apparel for home wear

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Cooling materials for summer jeans become popular

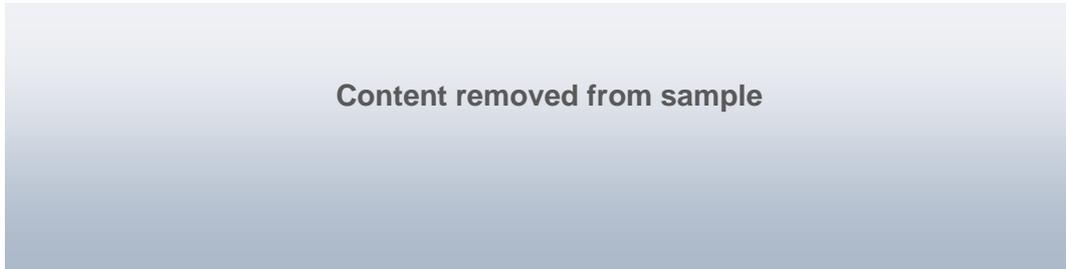
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Fast fashion brands increase their position at the expense of the leading player

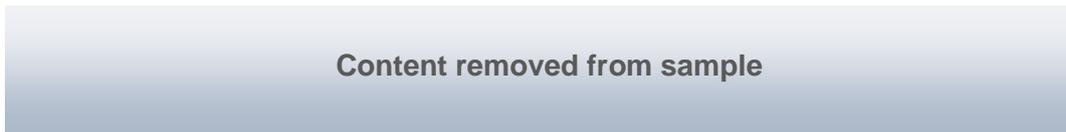
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RECOVERY AND OPPORTUNITIES

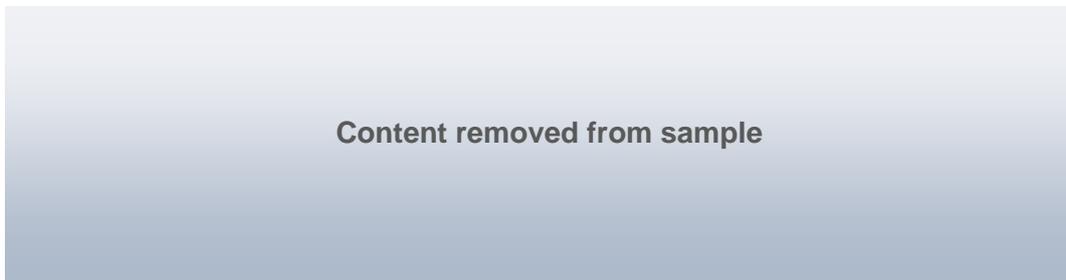
More comfortable product offerings essential to recovery in the forecast period



Expected easing in work dress codes will support growth of jeans



“Newtro” trend will continue developing



CATEGORY DATA

Table 69 Sales of Jeans by Category: Volume 2015-2020

mn units

	2015	2016	2017	2018	2019	2020
Economy Jeans	Data removed from sample					
Standard Jeans						
Premium Jeans						
Super Premium Jeans						
Jeans						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 70 Sales of Jeans by Category: Value 2015-2020

KRW billion

	2015	2016	2017	2018	2019	2020
Economy Jeans	Data removed from sample					
Standard Jeans						
Premium Jeans						
Super Premium Jeans						
Jeans						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 71 Sales of Jeans by Category: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Economy Jeans	Data removed from sample		
Standard Jeans			
Premium Jeans			
Super Premium Jeans			
Jeans			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 72 Sales of Jeans by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Economy Jeans	Data removed from sample		
Standard Jeans			
Premium Jeans			
Super Premium Jeans			
Jeans			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 73 Sales of Men's Jeans by Category: Volume 2015-2020

mn units

	2015	2016	2017	2018	2019	2020
Men's Jeans	Data removed from sample					
- Economy Men's Jeans						
- Standard Men's Jeans						
- Premium Men's Jeans						
- Super Premium Men's Jeans						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 74 Sales of Men's Jeans by Category: Value 2015-2020

KRW billion

	2015	2016	2017	2018	2019	2020
Men's Jeans	Data removed from sample					
- Economy Men's Jeans						
- Standard Men's Jeans						
- Premium Men's Jeans						
- Super Premium Men's Jeans						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 75 Sales of Men's Jeans by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Men's Jeans	Data removed from sample		
- Economy Men's Jeans			
- Standard Men's Jeans			
- Premium Men's Jeans			
- Super Premium Men's Jeans			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 76 Sales of Men's Jeans by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Men's Jeans	Data removed from sample		
- Economy Men's Jeans			
- Standard Men's Jeans			
- Premium Men's Jeans			
- Super Premium Men's Jeans			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 77 Sales of Women's Jeans by Category: Volume 2015-2020

mn units	2015	2016	2017	2018	2019	2020
Women's Jeans	Data removed from sample					
- Economy Women's Jeans						
- Standard Women's Jeans						
- Premium Women's Jeans						
- Super Premium Women's Jeans						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 78 Sales of Women's Jeans by Category: Value 2015-2020

KRW billion	2015	2016	2017	2018	2019	2020
Women's Jeans	Data removed from sample					
- Economy Women's Jeans						
- Standard Women's Jeans						
- Premium Women's Jeans						
- Super Premium Women's Jeans						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 79 Sales of Women's Jeans by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Women's Jeans	Data removed from sample		
- Economy Women's Jeans			
- Standard Women's Jeans			
- Premium Women's Jeans			
- Super Premium Women's Jeans			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 80 Sales of Women's Jeans by Category: % Value Growth 2015-2020

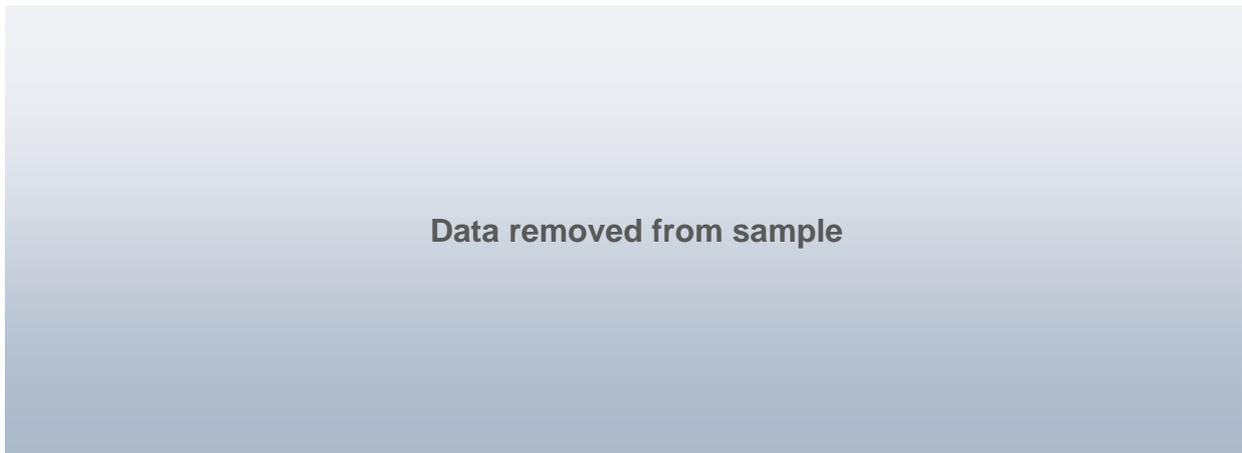
% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Women's Jeans	Data removed from sample		
- Economy Women's Jeans			
- Standard Women's Jeans			
- Premium Women's Jeans			
- Super Premium Women's Jeans			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 81 NBO Company Shares of Jeans: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
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Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 82 LBN Brand Shares of Jeans: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 83 Forecast Sales of Jeans by Category: Volume 2020-2025

mn units	2020	2021	2022	2023	2024	2025
Economy Jeans	Data removed from sample					
Standard Jeans						
Premium Jeans						
Super Premium Jeans						
Jeans						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 84 Forecast Sales of Jeans by Category: Value 2020-2025

KRW billion	2020	2021	2022	2023	2024	2025
Economy Jeans	Data removed from sample					
Standard Jeans						
Premium Jeans						
Super Premium Jeans						
Jeans						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 85 Forecast Sales of Jeans by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Economy Jeans	Data removed from sample		
Standard Jeans			
Premium Jeans			
Super Premium Jeans			
Jeans			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 86 Forecast Sales of Jeans by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Economy Jeans	Data removed from sample		
Standard Jeans			
Premium Jeans			
Super Premium Jeans			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 87 Forecast Sales of Men's Jeans by Category: Volume 2020-2025

mn units

	2020	2021	2022	2023	2024	2025
Men's Jeans	Data removed from sample					
- Economy Men's Jeans						
- Standard Men's Jeans						
- Premium Men's Jeans						
- Super Premium Men's Jeans						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 88 Forecast Sales of Men's Jeans by Category: Value 2020-2025

KRW billion

	2020	2021	2022	2023	2024	2025
Men's Jeans	Data removed from sample					
- Economy Men's Jeans						
- Standard Men's Jeans						
- Premium Men's Jeans						
- Super Premium Men's Jeans						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 89 Forecast Sales of Men's Jeans by Category: % Volume Growth 2020-2025

% volume growth

	2020/21	2020-25 CAGR	2020/25 Total
Men's Jeans	Data removed from sample		
- Economy Men's Jeans			
- Standard Men's Jeans			
- Premium Men's Jeans			
- Super Premium Men's Jeans			

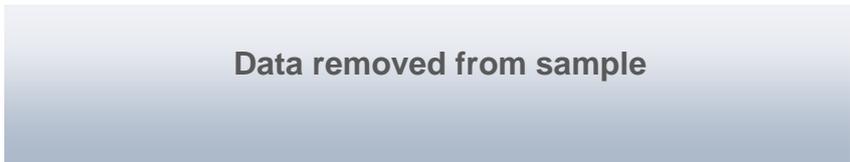
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 90 Forecast Sales of Men's Jeans by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

- Men's Jeans
- Economy Men's Jeans
- Standard Men's Jeans
- Premium Men's Jeans
- Super Premium Men's Jeans



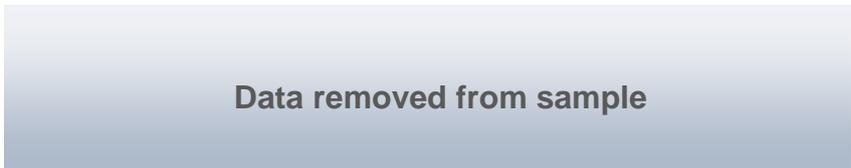
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 91 Forecast Sales of Women's Jeans by Category: Volume 2020-2025

mn units

2020 2021 2022 2023 2024 2025

- Women's Jeans
- Economy Women's Jeans
- Standard Women's Jeans
- Premium Women's Jeans
- Super Premium Women's Jeans



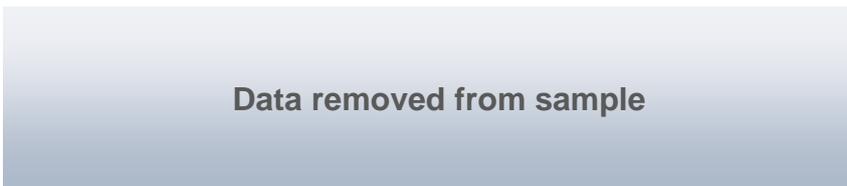
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 92 Forecast Sales of Women's Jeans by Category: Value 2020-2025

KRW billion

2020 2021 2022 2023 2024 2025

- Women's Jeans
- Economy Women's Jeans
- Standard Women's Jeans
- Premium Women's Jeans
- Super Premium Women's Jeans



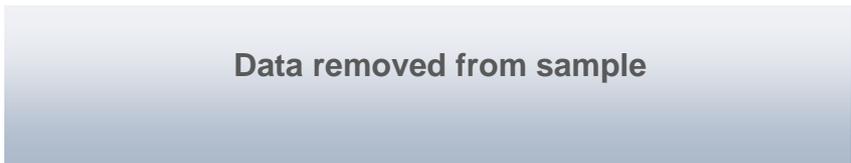
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 93 Forecast Sales of Women's Jeans by Category: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

- Women's Jeans
- Economy Women's Jeans
- Standard Women's Jeans
- Premium Women's Jeans
- Super Premium Women's Jeans



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 94 Forecast Sales of Women’s Jeans by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Women's Jeans	Data removed from sample		
- Economy Women's Jeans			
- Standard Women's Jeans			
- Premium Women's Jeans			
- Super Premium Women's Jeans			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

HOSIERY IN SOUTH KOREA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Sales slow in 2020

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TV homeshopping and e-commerce grow in 2020

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Speciality hosiery companies beginning to emerge

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RECOVERY AND OPPORTUNITIES

Steady growth expected in the forecast period

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Casualisation of work wear may negatively impact hosiery

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Positioning of hosiery as A fashionable item may boost sales

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CATEGORY DATA

Table 95 Sales of Hosiery by Category: Volume 2015-2020

mn units

	2015	2016	2017	2018	2019	2020
Sheer Hosiery	Data removed from sample					
Non-Sheer Hosiery						
Hosiery						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 96 Sales of Hosiery by Category: Value 2015-2020

KRW billion

	2015	2016	2017	2018	2019	2020
Sheer Hosiery	Data removed from sample					
Non-Sheer Hosiery						

Data removed from sample

Hosiery

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 97 Sales of Hosiery by Category: % Volume Growth 2015-2020

% volume growth

2019/20 2015-20 CAGR 2015/20 Total

Sheer Hosiery
Non-Sheer Hosiery
Hosiery

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 98 Sales of Hosiery by Category: % Value Growth 2015-2020

% current value growth

2019/20 2015-20 CAGR 2015/20 Total

Sheer Hosiery
Non-Sheer Hosiery
Hosiery

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 99 NBO Company Shares of Hosiery: % Value 2016-2020

% retail value rsp
Company

2016 2017 2018 2019 2020

Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 100 LBN Brand Shares of Hosiery: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 101 Forecast Sales of Hosiery by Category: Volume 2020-2025

mn units	2020	2021	2022	2023	2024	2025
Sheer Hosiery	Data removed from sample					
Non-Sheer Hosiery						
Hosiery						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 102 Forecast Sales of Hosiery by Category: Value 2020-2025

KRW billion	2020	2021	2022	2023	2024	2025
Sheer Hosiery	Data removed from sample					
Non-Sheer Hosiery						
Hosiery						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 103 Forecast Sales of Hosiery by Category: % Volume Growth 2020-2025

% volume growth	2020/21	2020-25 CAGR	2020/25 Total
Sheer Hosiery	Data removed from sample		
Non-Sheer Hosiery			
Hosiery			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

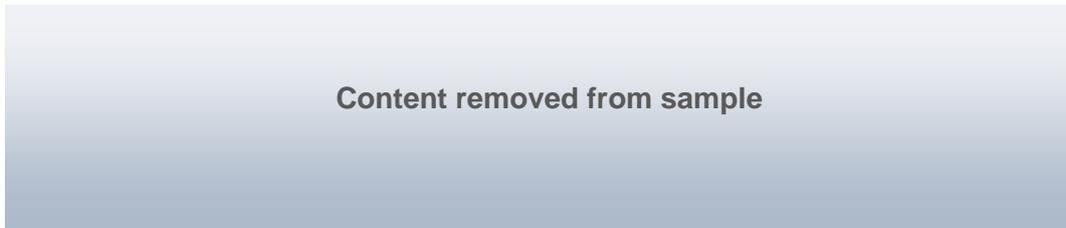
Table 104 Forecast Sales of Hosiery by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Sheer Hosiery	Data removed from sample		
Non-Sheer Hosiery			
Hosiery			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

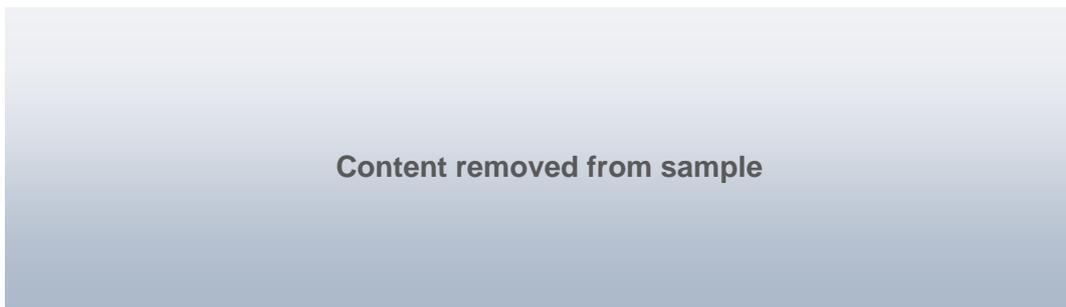
FOOTWEAR IN SOUTH KOREA - CATEGORY ANALYSIS

KEY DATA FINDINGS

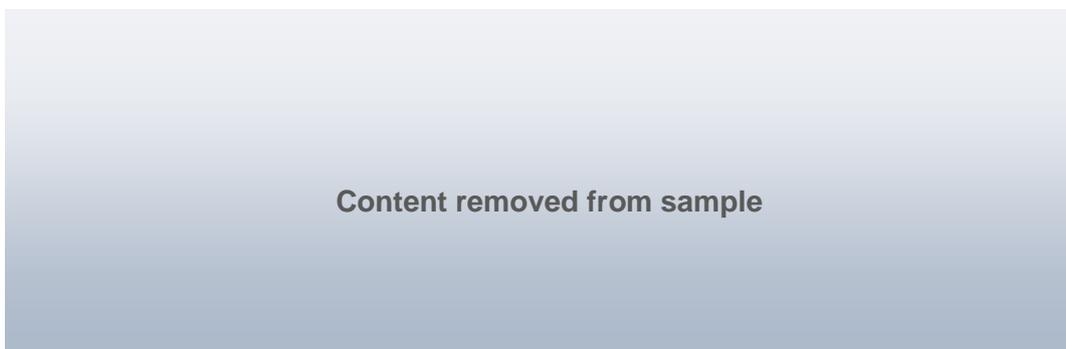


2020 IMPACT

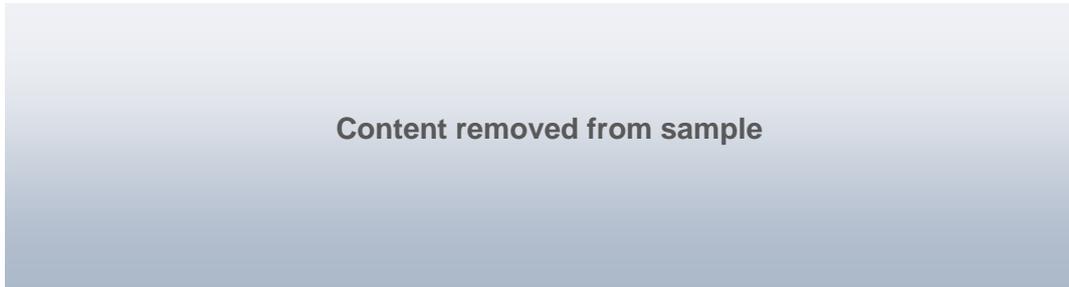
Brands turn to live broadcasts on social media to stimulate demand in 2020



Online presence is essential in 2020

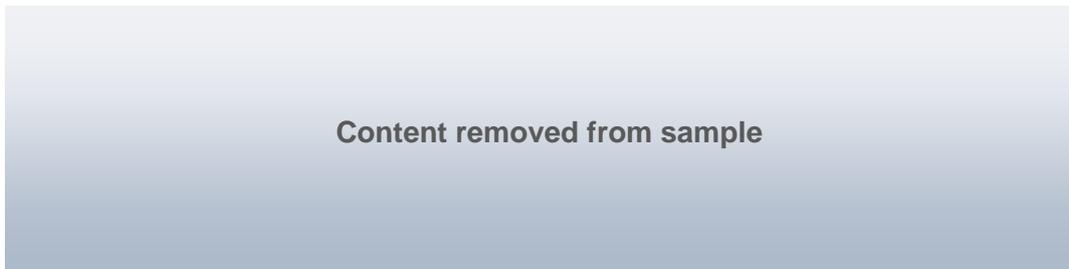


Sportswear brands strengthen their presence in footwear

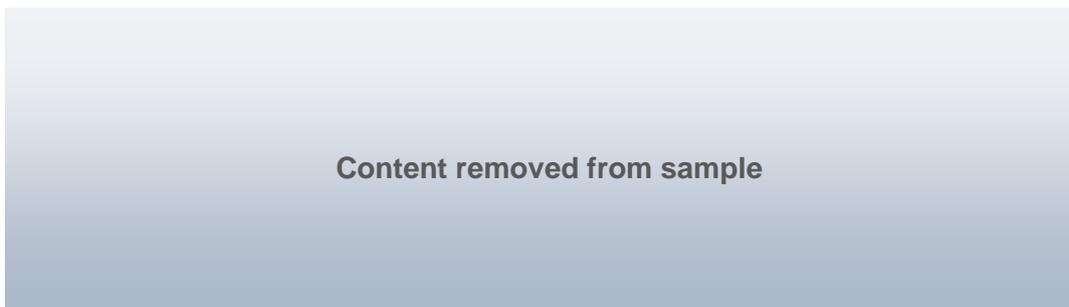


RECOVERY AND OPPORTUNITIES

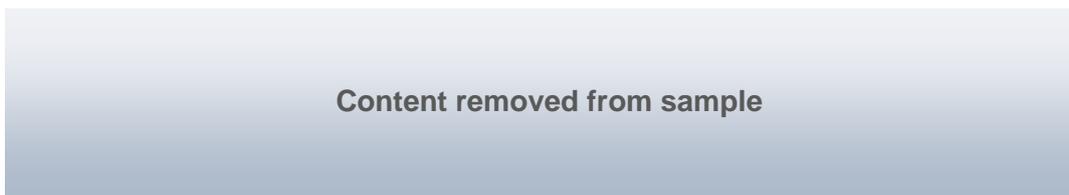
Casual footwear will drive the recovery in the forecast period



More expansions into e-commerce expected



Consumers will continue turning to unbranded footwear



Content removed from sample

CATEGORY DATA

Table 105 Sales of Footwear by Category: Volume 2015-2020

mn units	2015	2016	2017	2018	2019	2020
Children's Footwear	Data removed from sample					
Men's Footwear						
Women's Footwear						
Footwear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 106 Sales of Footwear by Category: Value 2015-2020

KRW billion	2015	2016	2017	2018	2019	2020
Children's Footwear	Data removed from sample					
Men's Footwear						
Women's Footwear						
Footwear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 107 Sales of Footwear by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Children's Footwear	Data removed from sample		
Men's Footwear			
Women's Footwear			
Footwear			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 108 Sales of Footwear by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Children's Footwear	Data removed from sample		
Men's Footwear			
Women's Footwear			
Footwear			

Footwear

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 109 NBO Company Shares of Footwear: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 110 LBN Brand Shares of Footwear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 111 Distribution of Footwear by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery						

- Retailers
- Non-Grocery Specialists
- Apparel and Footwear Specialist Retailers
- Leisure and Personal Goods Specialist Retailers
- Sports goods stores
- Other Leisure and Personal Goods Specialist Apparel Retailers
- Other Non-Grocery Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 112 Forecast Sales of Footwear by Category: Volume 2020-2025

mn units

	2020	2021	2022	2023	2024	2025
Children's Footwear	Data removed from sample					
Men's Footwear						
Women's Footwear						
Footwear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 113 Forecast Sales of Footwear by Category: Value 2020-2025

KRW billion

	2020	2021	2022	2023	2024	2025
Children's Footwear	Data removed from sample					
Men's Footwear						
Women's Footwear						
Footwear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 114 Forecast Sales of Footwear by Category: % Volume Growth 2020-2025

% volume growth

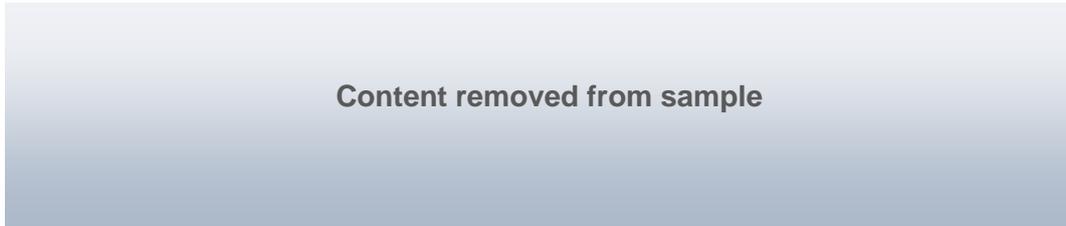
	2020/21	2020-25 CAGR	2020/25 Total
Children's Footwear	Data removed from sample		
Men's Footwear			
Women's Footwear			
Footwear			
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources			

Table 115 Forecast Sales of Footwear by Category: % Value Growth 2020-2025

% constant value growth	2020/2021	2020-25 CAGR	2020/25 Total
Children's Footwear	Data removed from sample		
Men's Footwear			
Women's Footwear			
Footwear			
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources			

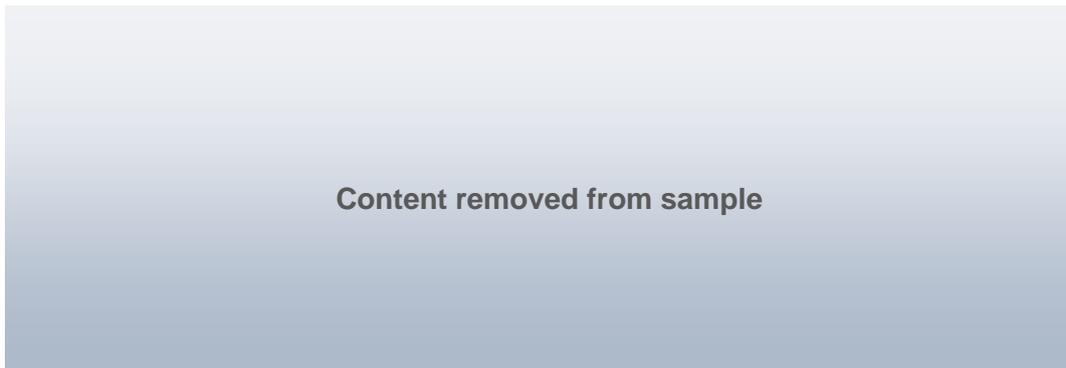
SPORTSWEAR IN SOUTH KOREA - CATEGORY ANALYSIS

KEY DATA FINDINGS

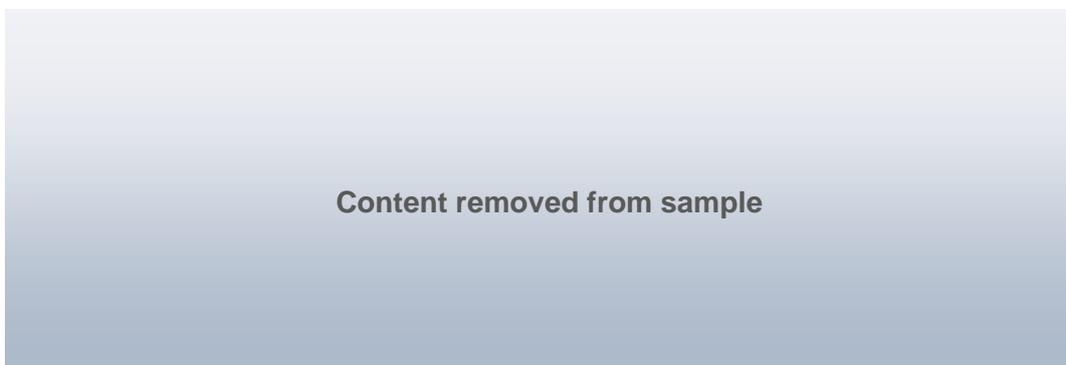


2020 IMPACT

Popularity of at-home fitness moderates the decline in 2020



Emphasis on healthy lifestyle benefits sportswear



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Sportswear brands focus on offering attractive home-wear

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RECOVERY AND OPPORTUNITIES

Recovery will be supported by healthy lifestyles and remote work in the forecast period

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Local brands will enjoy success due to Asian fit designs

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Some brands may dissolve due to pressure from the pandemic

Content removed from sample

Content removed from sample

CATEGORY DATA

Table 116 Sales of Sportswear by Category: Value 2015-2020

KRW billion	2015	2016	2017	2018	2019	2020
Sports Apparel	Data removed from sample					
- Performance Apparel						
- Outdoor Apparel						
- Sports-inspired Apparel						
Sports Footwear						
- Performance Footwear						
- Outdoor Footwear						
- Sports-inspired Footwear						
Sportswear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 117 Sales of Sportswear by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Sports Apparel	Data removed from sample		
- Performance Apparel			
- Outdoor Apparel			
- Sports-inspired Apparel			
Sports Footwear			
- Performance Footwear			
- Outdoor Footwear			
- Sports-inspired Footwear			
Sportswear			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 118 NBO Company Shares of Sportswear: % Value 2016-2020

% retail value rsp Company	2016	2017	2018	2019	2020
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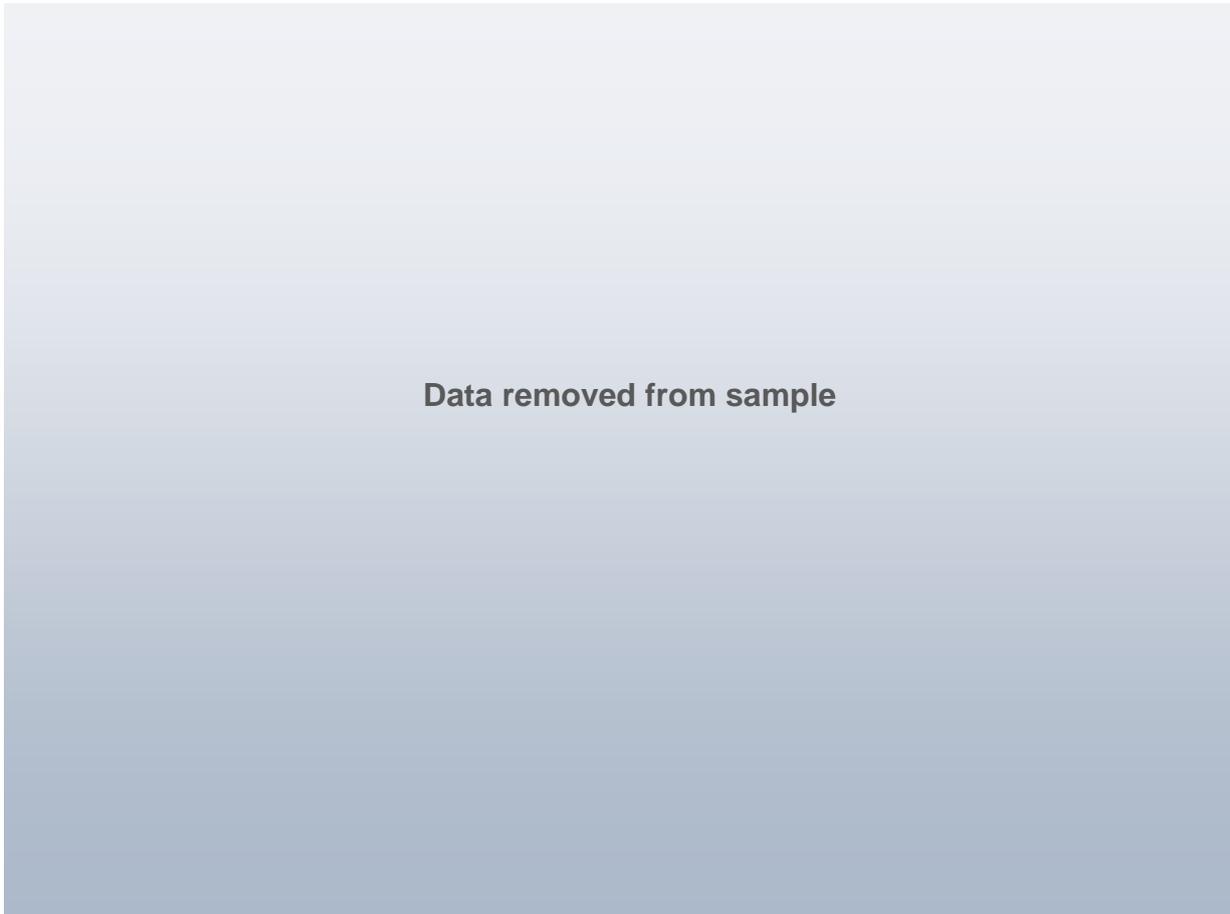
Data removed from sample

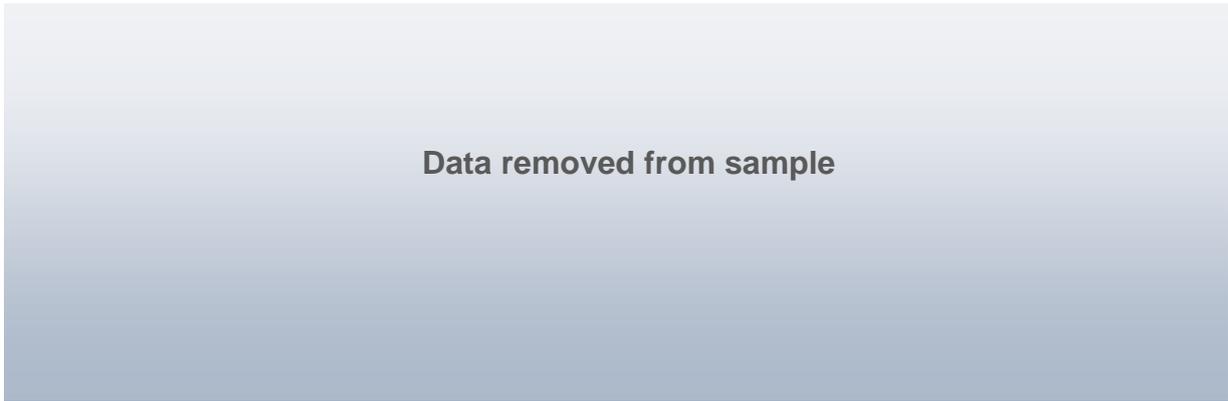


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 119 LBN Brand Shares of Sportswear: % Value 2017-2020

% retail value rsp Brand (GBO)	Company (NBO)	2017	2018	2019	2020
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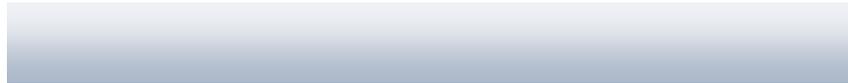


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 120 Distribution of Sportswear by Format: % Value 2015-2020

% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Non-Grocery Specialists						
-- Apparel and Footwear Specialist Retailers						
-- Leisure and Personal Goods Specialist Retailers						
--- Sports goods stores						
--- Other Leisure and Personal Goods Specialist Apparel Retailers						
-- Other Non-Grocery Specialists						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
Non-Store Retailing						
- Direct Selling						
- Homeshopping						
- E-Commerce						

- Vending
Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 121 Forecast Sales of Sportswear by Category: Value 2020-2025

KRW billion

	2020	2021	2022	2023	2024	2025
Sports Apparel	Data removed from sample					
- Performance Apparel						
- Outdoor Apparel						
- Sports-inspired Apparel						
Sports Footwear						
- Performance Footwear						
- Outdoor Footwear						
- Sports-inspired Footwear						
Sportswear						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 122 Forecast Sales of Sportswear by Category: % Value Growth 2020-2025

% constant value growth

	2020/2021	2020-25 CAGR	2020/25 Total
Sports Apparel	Data removed from sample		
- Performance Apparel			
- Outdoor Apparel			
- Sports-inspired Apparel			
Sports Footwear			
- Performance Footwear			
- Outdoor Footwear			
- Sports-inspired Footwear			
Sportswear			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources