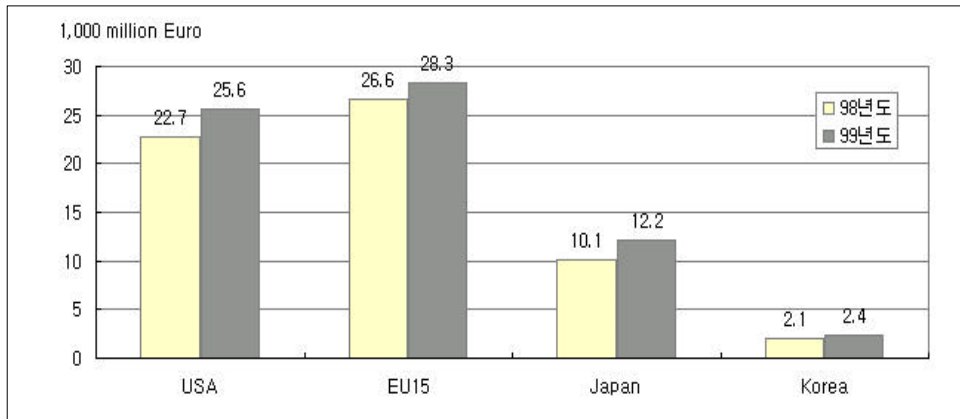


[]

.....
가

1.

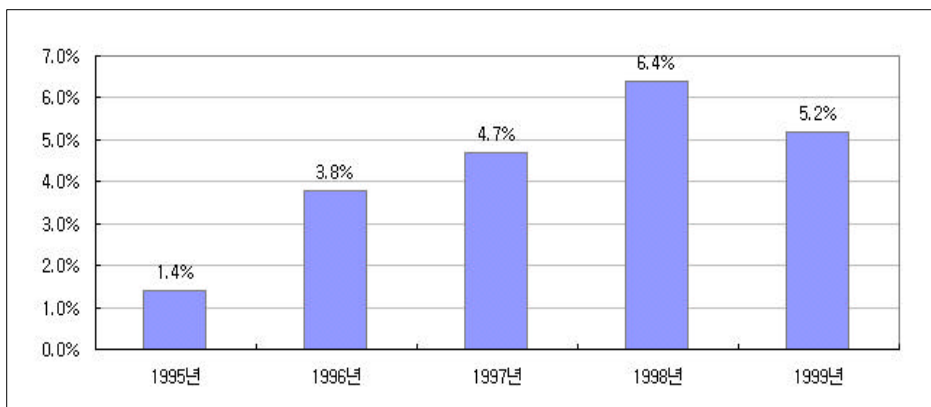
....., '95
 5%
 가 35%, 32%,
 22% 11%
 가가
 가, EU 15
 가, 가
 (1)
 EU 15 가 1999
 283 Euro,
 80
 가 가 5 (, , ,
 ,) 35%
 , 가



1 ()

: Colipa Statistics Working Group 2000

2. 가 '99 5.2%
 ('99 465 Euro).
 15 가 15
 (POS :The Point of Sale) 가 (RSP : Retail Sales Prices) 가 , , C&T Market
 , (Cosmetics & Toiletries, C&T Market) 1998 6.4% '95 5.3% 가 (48.5 thousand million Euro). 가



2 가

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가
Selective distribution, Hairdressers /
Professional haircare

‘99
C&T Market 50 thousand million
Euro C&T Market
+10.6% 가
, ,
, ‘99 가
가 (1)

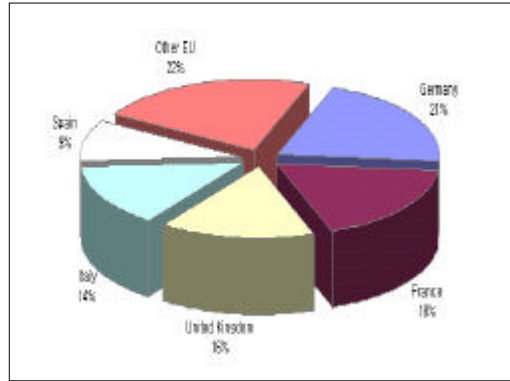
1 가 가

	가	가
1	Denmark	10.6%
2	Finland	9.6%
3	Spain	8.7%
4	Greece	8.4%
5	Norway	8.4%
6	Ireland	8.3%
7	Italy	6.9%
8	Sweden	6.7%
9	Netherlands	6.6%
10	Austria	6.5%
11	Belgium/Luxemb.	6.5%
12	Switzerland	6.2%
13	France	5.3%
14	Portugal	4.7%
15	Germany	2.9%
16	United Kingdom	2.6%

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가
(3)
20.8% 가
, 가
79% , 15 가

81.5%



3 '99 C&T Market 가

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C&T Market 가 '99
100 Euro 가
, 3
C&T Market 가
'99 88 Euro
가 , 79 Euro,
가 70 Euro, 46 Euro

2 '99 C&T Market 가

(: Euro, %)

	가		
1	Germany	10,000	20.8
2	France	8,800	18.0
3	United Kingdom	7,600	15.6
4	Italy	7,000	14.3
5	Spain	4,600	9.4
6	Other EU	10,500	21.9
7	EU Total	48,500	100.0

: Colipa Statistics Working Group 2000

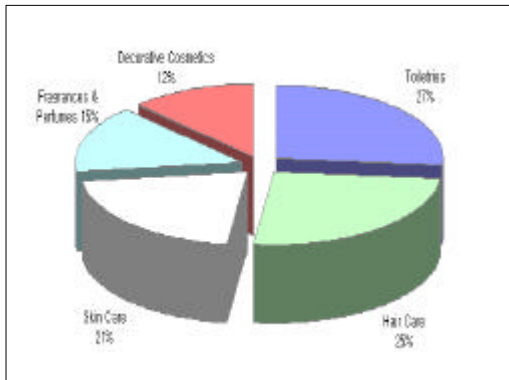
(Product
category structure) , 1999
C&T Toiletries가가

(Bath&shower product, Toilet Soaps, Shaving products, Oral hygiene, Deodorants, Depilatories, Powders, Food care product)

26.7% , 5.2%
 (가 Hair care)
 25.2% , 5.6%
 ()

20.8% 6.5%
 EU15 C&T 15.2%
 6.2%

Decorative cosmetics 가 가
 11.3% ,
 1998 11.5% 1999 12.1%
 가



4 '99 C&T Market

: Colipa Statistics Working Group' 1999

C&T Market 가
 '99 256 Euro '98 227
 Euro 12.7%

()

3

(: %)

	97	97	97	98
	3.9	4.1	4.0	1.2
	6.4	12.5	9.5	12.5
	9.0	13.3	7.7	9.8
	6.2	8.8	7.7	9.8

: NPD, IRI,

가가

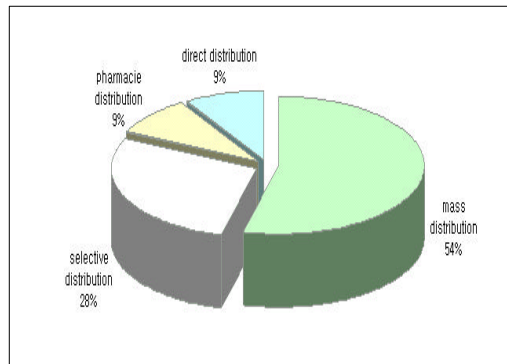
'99 , 359 (88
 Euro)
 366

가 가

47가
 (selective distribution, mass distribution, direct selling and French pharmacies)

. 47가

(5)



5 1999

:

가 15.5%(72 Euro)
 , 7.1% 가 , 가 가 .
 12.1%(57 Euro)
 , , , 6.9% 3.
 가) 7.1% , , 가
 4 9.9 .
 billion Euro 7.1% , , , 1%
 . ()
 가 117 Euro 5.0% ,
 213% C&T 가
 2.2% 가
 25.9% 120 Euro 가 '95
 , '98 3.6% 가
 , '77 '99 12.7%
 (9.6%) '99 .
 . '90 .
 2% 가 , 10
 가5 가 .
 가 가 가
 가 가 가
 , 가
 가 가 가

가 .
5
가
95
, 가
. 98
.