The Lagged Development of the Korean Manhwa Industry from 1910 to the Present: The Formation of Negative Perceptions

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Abstract
In comparison to Korea’s other cultural industries, manhwa 만화 has shown a lagged development. As a result, the Korean government has recently shown interest in this industry and begun to support it. However, the fundamental reasons for the lagged development of manhwa should be carefully scrutinized in order to make promotion policies and support more effective and thus to achieve further development and advancement of the manhwa industry. This article seeks to address this issue and argues that the core problem is derived from a negative view toward manhwa as it has been considered to be harmful to Korean society and, hence, not acknowledged as a part of culture. Therefore, this paper takes a historical approach to track down how this negative view formed and why it has prevailed in Korea. To this end, political and economic changes related to the manhwa industry are analyzed with a focus on production and consumption. The paper reveals that it was not only coercive public policies but also a lack of production capacity that induced a distorted view toward manhwa and caused the development of the industry to lag. Where business strategies have been adopted in an improved business environment, this has helped to enhance production to achieve better outcomes and change the view of consumers toward manhwa, resulting in an increase in consumption.

Keywords
manhwa | cultural industry | cultural policy | production | consumption | Hallyu

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INTRODUCTION

Since the late 1990s, popular cultural content from Korea has enjoyed a strong following across East Asia and its attractiveness has expanded further to many other regions including the Americas, Europe, the Middle East, and Africa. This cultural development has come to be known as Hallyu 한류 or the Korean Wave. It has diversified from films, dramas, and music to include cuisine, games, and even cosmetics. In recognition of this diversification, the Korean government has shown more interest in promoting other sectors that have shown a lagged development but have some potential (Figure 1). One area of keen interest is the manhwa 만화 industry, whose history can be traced back to the early 1910s.¹

![Figure 1. Performance of the main cultural industries in Korea (2018).²](image)

Unit: million USD.

¹ Comics in Chinese characters is “漫畵” or “漫画” (manhua). These characters are pronounced differently in each language that has adopted this word. For example, manga まんが in Japanese or manhwa 만화 in Korean. Over time, these terms have developed according to the specific nationality of the publication. Manga refers to Japanese publications and manhwa to Korean ones while the term “comics” often refers to the output of American publishers like Marvel or DC. In this paper, manga and manhwa are used with the aforementioned distinction of nationality. According to the Korean government, this industry is known as the “cartoon industry.” The general usage of the term “cartoon,” though, is very limited. Thus, manhwa industry is utilized in this paper.

² Ministry of Culture, Sports and Tourism (MCST), K’ontench’ŭsanŏpt’onggye (Sejong: MCST, 2019). 3. Due to the COVID-19 pandemic, data for 2018 is utilized in order to avoid any possible distortion.
It needs to be stressed here that in Korea the term *manhwa* does not distinguish between moving images (e.g., animated films and cartoons) and non-moving images (e.g., comics and webtoons, which is a Korean term that refers to online comic strips). The border between these two has blurred recently due to technological advancement and digitization. Despite this, the Korean government clearly distinguishes between them. This paper follows this approach and focuses on *manhwa* as a kind of cultural production involving non-moving images.

As part of its support for this sector, the Korean government launched a three-phase promotion plan: the first phase was to last from 2002 to 2008, the second from 2009 to 2013, and the third from 2014 to 2018. The main policy tool adopted by the government in this regard was the *Manhwa Promotion Law* (Manhwajinhŭng e kwanhan pŏmnyul 만화진흥에 관한 법률) of 2012, which sought to push ahead with more assertive policies by increasing the number of subsidies. This is the first law of its kind in Korea that has a specific focus on the *manhwa* industry. Previously, the industry was regulated by the Publishing Industry Promotion Act (Ch’ulp’anmunhasanŏp chinhŭngbŏp 출판문화산업 진흥법, 1962–1988), the Act on Promotion of Periodicals (Chŏnggiganhaengmul ŭi tŭngrok tŭng e kwanhan pŏmnyul 정기간행물의 등록 등에 관한 법률, 1988-2011), or other ad hoc policies.

The situation has not always been favorable for *manhwa*. Comprising of editorial (or sarcastic) and entertainment *manhwa*, the industry has been disregarded as a serious form of culture since its birth in Korea. Then, educational *manhwa* was only first included in the industry in 2006. This was due to its economic value, as this sector has shown significant growth led by educational

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3 The characteristics of each phase are as follows: the first phase is to foster creativity, build infrastructure for production and distribution, improve awareness of *manhwa*, and improve and reform the relevant legal system; the second phase is to enhance creativity, improve distribution and marketing, and revitalize the licensing business; and the third phase is to expand the creative talent pool, establish fair distribution, and promote webtoons. For further information, see Byung Soo Kim and Won Seok Lee, “3ch’a manhwa sanŏp chungjanggi paljŏn kyehoik surip gwa chŏnmunilyŏkyangsŏng chŏngchaek,” *Cartoon & Animation Studies* 32 (2013): 189–200; Ministry of Culture, Sports and Tourism (MCST), “Manhwa sanŏp yuksŏng chungjanggi kyehoik,” https://www.mcst.go.kr/servlets/eduport/front/upload/UploadDownloadFile?pFileName=[0528]%EB%B3%84%EC%B2%A8-%EB%A7%8C%ED%99%94%EC%82%B0%EC%96%85%EA%B8%B0%EA%B3%84%ED%9A%8D(2014~2018).hwp&pRealName=18B4039D15DA4150A4959D0BFED177B9C.hwp&pPath=0302000000 (accessed April 22, 2020).


5 There are three main types of *manhwa*: editorial (or sarcastic), entertaining, and educational.
manhwa rather than the recognition of its cultural value. Webtoons were on a similar path. Although they began to emerge in the early 2000s, they were finally included in 2013 thanks to their widespread success. Looking at Figure 1, which is based on data from 2018, the manhwa industry shows very modest performance despite the inclusion of the strongly performing sectors, educational manhwa and webtoons. This provides a sense of how poorly the manhwa industry has performed.

For these reasons, it is hard to avoid the conclusion that these successful sectors were included under the label of the manhwa industry in order to boost its apparent size and to show that Korea’s cultural industries are growing. Taken together, these facts raise three important questions. First, why has the Korean manhwa industry shown modest performance and lagged development compared to other cultural industries? Second, why has this industry not been acknowledged as a serious part of culture despite its long history? Third, how have educational manhwa for children and webtoons achieved their strong growth in contrast to other sectors of the same industry?

Answering these questions is critical if the competitiveness of the manhwa industry is to be improved, as the answers are likely to indicate how to develop more effective public policies. This paper thus seeks to address these issues by covering the following content. The first section examines the existing literature to highlight the need for the approach taken in this paper and describes briefly the methodology used in the paper. The second section analyses the disrupted development of the Korean manhwa industry. The third section scrutinizes the resurgent development of the industry by focusing on the evolution of production and consumption. The fourth section further discusses approaches to advance the manhwa industry. Finally, the last section summarizes the main implications to be drawn from this paper and highlights areas for possible future research.

In terms of its approach, this paper utilizes descriptive and qualitative data found in existing studies or based on reliable secondary sources. This is because a large number of manhwa and relevant data have not been well archived as manhwa has not been considered to be part of culture in Korea for a long period of time. Regarding the time covered by this paper, there are six distinctive periods: first, the Japanese occupation (1910–1945); second, the post-occupation

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7 Ministry of Culture, Sports and Tourism (MCST), K’ontench’ūsanŏpt’ŏnggye (Seoul: MCST, 2013), 146, 154.
recovery from 1945 to 1950s; third, the 1960s and 1970s, which were characterized by military rule and rapid economic development; fourth, economic stabilization during the 1980s; fifth, the 1990s, characterized by liberalization and informatization; and finally, the period from the 2000s until the present. Instead of juxtaposing all the relevant details in each period, this paper focuses on the critical policy changes that have significantly affected production and consumption, contributing to negative perceptions toward manhwa.

THE NEGLECTED FACTOR: THE FORMATION OF NEGATIVE PERCEPTIONS TOWARD MANHWHA

Only recently have scholars from various disciplines begun to pay attention to the manhwa industry due to its significant transition and growth.8 Given that manhwa operated under the strict censorship policies of the military government from the 1960s to the 1980s, much of the literature has focused on how much the industry suffered and the extent to which its development was hindered given the limited freedom of expression.9 Webtoons, by contrast, have been subject to interest due to this sector’s significant growth in recent years. As such, many have focused on how this sector embraces digitization and how well it has been received by consumers around the world.10 Their contributions are meaningful for the study of manhwa, but a broader perspective can provide a better understanding of the delays to the industry’s development and the recent growth of particular sectors such as webtoons.

When exploring the manhwa industry in more detail, several scholars have raised issues that have hindered its development. They state that: (i) the production of manhwa in Korea is weak as the market size is small; (ii) there is

no specialization in the production of quality work;\textsuperscript{11} and (iii) workers receive limited wages due to over-hiring and a distorted labor market.\textsuperscript{12} While these evaluations are meaningful, most of their findings are merely related to the production of manhwa and these can be considered outcome variables. For example, as the industry has not been well developed and is small, the production of manhwa can be weak and therefore lack specialization; hence, wages are limited. In other words, these factors are not the fundamental reasons for the lagged development of the manhwa industry. For instance, why is production weak? Why is there no specialization in production? Why is the labor market distorted? And why does the market remain underdeveloped and small?

In this regard, it should be noted that a number of Korean cultural industries, such as pop music, films, and dramas, were also less developed in their early stages; however, these industries have successfully emerged in the domestic and global markets.\textsuperscript{13} By contrast, when compared with these industries, manhwa existed under harsher conditions. For example, from the 1960s onwards the Korean government urged the public, especially school students, to burn manhwa books, a trend similar to what happened in the United States during the 1940s when comics first appeared (Figure 2).\textsuperscript{14}

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{Figure2.png}
\caption{Public burning of manhwa and comic books. The Seoul Metropolitan Police together with students burn manhwa and “substandard” books in Changchungdan Park (Changch’ungdan kongwon 장충단 공원), Seoul in 1966 (left); Catholic school students burn thousands of comic books in Binghamton, New York in 1948 (right).\textsuperscript{15}}
\end{figure}

\textsuperscript{11} Woo Song Bang, “Manhwa sanŏp ŭi hyŏnhwangbunsŏk mit paljŏn panghyang mosaek,” The Korea Contents Association Review 9, no. 3 (2011): 18–22; Tae-Won Kyung, “Manhwa sanŏp ŭi hyŏnhwang gwa hwalsŏngghwa pangan,” The Korea Contents Association Review 13, no. 2 (2015): 20–23; specialisation is a method of production whereby an entity focuses on the production of a limited scope of goods to gain a greater degree of efficiency. For instance, one creator should focus on story development while the other should focus on character development to meet widespread and sophisticated demand.

Gradually, this practice changed in the United States, which today has one of the largest markets in the world for comics. By contrast, the situation in Korea has remained stagnant, although as mentioned previously educational manhwa for children and webtoons have partially offset this trend in recent years. These contrasting situations show that the consumption of manhwa can be heavily influenced by the will of the government. They suggest that the stunted development of the Korean manhwa industry may be the result of coercive policies pursued by the government. This highlights the need to examine where such public policies originated and why and how the government later decided to become supportive, particularly toward educational manhwa and webtoons.

In examining these trends, it becomes clear that both production and consumption should be carefully examined since they interact closely. It is also important to consider the effect of public policies on the interaction between production and consumption. So far, most studies have only dealt with a specific period or historical event that has affected manhwa rather than looking at the wider history of the industry. To address this gap, this paper takes a historical approach to identify where such coercive policies originated and how these policies have impacted the production and consumption of manhwa.

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14 John A. Lent, ed. Pulp Demons: International Dimensions of the Postwar Anti-Comics Campaign (Madison and Teaneck: Fairleigh Dickinson University Press, 1999); Han, “1960 nyŏndaē hanguk manhwa esŏ tŭrŏnan pangongjuŭi ŭi myŏt kaji yangtæ,” 100.


DISRUPTED DEVELOPMENT OF THE MANHWA INDUSTRY

The Japanese occupation period (1910–1945): The birth of manhwa and the formation of its distorted image

It is important to mention here that knowledge on the manhwa produced during this specific period is limited. Still, Lee Doyŏng 이도영 is generally regarded as having become the first Korean cartoonist when his single-panel drawing on current affairs was published in a newspaper on June 2, 1909 (Figure 3). During the late period of the Korean Empire (Taehan Cheguk 대한제국, 1897–1910), manhwa and its satirical cartoon techniques were transferred from Western news publications to Korea through Japan. As a new “genre,” manhwa soon became popular among consumers who purchased newspapers. Shortly thereafter, the market evolved into two categories: satirical and comic manhwa.

Figure 3. The first cartoon to appear in Korea. The front page of Taehanminbo 대한민보, where the first manhwa appeared (left); a mandate by the newspaper on the national situation, national solidarity, unanimous opinion, and diversified content (right).

Due to the growing political interference of Japan and Russia in the early twentieth century, manhwa satirized these countries and/or sought to arouse patriotism. Shortly thereafter, its development was hindered by the Japanese occupation of the Korean Peninsula (1910–1945) and suppression of Korean me-

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dia. This went further when the Japanese Government-General of Korea announced that Japanese would be the official language in 1911 and later banned the use of the Korean language completely in 1938. Throughout its occupation, Japan devoted a lot of work to the assimilation of Korea and sought to eradicate its national identity. Manhwa was not considered an independent industry, but both satirical and comic cartoons appeared in the daily newspapers. The former portrayed societal and political issues in a mocking way while the latter usually featured children as the main characters and light humor. In this environment, satirical manhwa became subject to control and suppression by the Japanese authorities. At the same time, those that were not subject to political control, like the comic cartoons, were considered by the general population to be childish, a perception which persists to this day in Korea.

During the occupation period, manhwa was used as a propaganda tool by the Japanese authorities, either to persuade the Korean public to support their policies or to denounce the development level of Korea and its people while emphasizing Japan’s own advanced progress. For instance, Figure 4 implies that a Korean aristocrat does not know about the existence of cars (left image) or does not know how to board a tram (right image). These trends continued throughout the occupation period until the liberation of Korea in 1945. Given this context, it is easy to assume that the majority of Korean consumers, particularly people from the intellectual class and former politicians, would have viewed manhwa negatively as a tool of propaganda during this period. This whole process formed the basis of a vicious circle in the domestic market, particularly among producers and consumers, which hindered the development of the manhwa industry.

Post-liberation period (1945–1950s): Manhwa’s growth

After Korea’s liberation from Japan in 1945, the Korean manhwa industry began to enjoy a boom as there was little in the way of entertainment at the time and political constraints had been released. A number of people from newspaper and publishing companies began to produce various genres and styles of manhwa to meet consumer demand. After 1947, manhwa was usually published in a sixteen-page booklet using low-quality paper due to the shortage of raw materials at that time. Known as Ttegi, these publications became very popular among the young generation, who emerged as the main consumers, since they were cheap and easy to circulate among friends. Furthermore, between 1945 and 1950, various manhwa magazines for adults were also produced and vividly depicted the social situation of the time. As both satirical and comic manhwa took hold, the market grew significantly until the sudden outbreak of the Korean War on June 25, 1950.

During the Korean War (1950–1953), manhwa was again used for propaganda purposes while losing its close association with journalism and satire. In spite of this, its entertainment aspect developed further, although it was restricted to the Busan area which had not been captured by North Korea and where most of

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the wartime refugees congregated. During the war, manhwa rental shops began to appear, where young consumers could read an unlimited amount for a fixed hourly rate. Such rental shops helped to increase the size of the market quickly, and publishers had to keep up with increasing demand.

Despite the growth in the market, the development of the manhwa industry was limited as most publications were simply produced as single-edition booklets that did not lead to the formation of a larger and more loyal readership. This signifies that a limited number of Korean manhwa producers had to create a vast number of different characters and diverse stories, which naturally became a burden and led to a deterioration in quality. In such a testing environment, these booklets were soon filled with inconsistent storylines, violent content, and orthographic errors. In response, the Korean government began to regulate their content from April 1951 to improve the quality of manhwa by ensuring that it contained more coherent storylines, less violence, and correct orthography.\(^\text{27}\)

From the producer’s perspective, a common way to circumvent these restrictions on content while meeting the increasing demand from publishers was to imitate and/or produce pirated versions of works from other countries. An example of this was Kim Sang-ok 김상옥 and Seo Bong-jae 서봉재 who copied the Japanese manga series *Kenya Boy* (Shōnen Keniya 少年ケニヤ) and published it in Korean as *The King of the Jungle* (Milim ŭi wangja 밀림의 왕자) in 1952 (Figure 5). This is known to be the first case of piracy, and it led to a trend for plagiarizing Japanese manga.\(^\text{28}\)

![Figure 5. The Japanese original (left) and the Korean copy (right).\(^\text{29}\)](https://www.u-story.kr/960)

\(^{27}\) Ibid., 558.


The practice of piracy and plagiarism was able to persist in Korea due to three key drivers. First, as mentioned before, these manhwa producers had to satisfy demand from a growing market where Korean consumers wanted to read whole series of manhwa rather than single-edition comics. Second, the Japanese manga industry, by contrast, was advanced and commonly produced many long-running series. In this regard, producing many pirated versions of popular Japanese manga in Korean was the easiest way for manhwa publishers to generate profits. Third, Korea did not have any official diplomatic relations with Japan at the time, while Japanese cultural products were officially banned in Korea due to the negative legacy of the occupation period, thus many Korean cartoonists copied Japanese manga without any legal restrictions.\(^\text{30}\)

In 1954, the government launched campaigns to abolish illiteracy. The Korean manhwa market increased further in line with this effort and manhwa magazines for adults reappeared in 1956, having been discontinued during the Korean War. With the expansion of the market size coupled with the growth in manhwa rental shops, the business-minded distributor Seoul Chongpan 서울총판 was formed in 1957. It was the only distributor that covered the whole domestic market and was unique in its formation of a vertical chain across production-distribution. With improved distribution channels, more manhwa had to be published, which increased the number of Japanese manga that were pirated and copied in Korea. Another effect of this was that many publishers began to hire non-professional cartoonists and translators.\(^\text{31}\) However, as the many pirated versions of Japanese manga often contained explicit sexual content, which was secretly consumed by the young generation, negative perceptions of manhwa among the Korean public and the government increased.

\textit{During the 1960s and the 1970s: The dark age of manhwa and the emergence of animated films}

Despite the increasingly negative public perception of manhwa among the older generation and the government, this industry grew considerably as the baby boomers became its main consumers and there was still little in the way of alternative entertainment. Naturally, the manhwa industry became a lucrative business. However, a monopoly in the manhwa industry emerged under the company Hapdong Publishing 합동출판사 (hereafter Hapdong), which controlled every aspect from production and distribution to sales. Since Hapdong

\(^{30}\) Kukhee Choo, “Hyperbolic Nationalism: South Korea’s Shadow Animation Industry,” \textit{Machinaemia} 9 (2014): 144–62. In these early years, the notion of copyrights in Korea and Japan was not highly developed.

\(^{31}\) Baek, “Hanguk chŏnjaeng gwa manhwa,” 561.
initially offered a large volume of diverse manhwa with cheaper prices to rental shops, this company was welcomed. With this strategy, it was able to absorb other competitors that struggled financially. Once Hapdong had obtained monopolistic power, it offered little remuneration to cartoonists and became more involved in production as it had always sought to do. Later, this company even made efforts to control the distribution of manhwa to rental shops by deciding upon titles and quantities. Of course, this practice adversely affected the quality of manhwa content, preventing it from satisfying consumers.

This monopolistic situation seemed to be challenged when Hankookilbo 한국일보, one of the Korean daily newspaper companies began publishing and distributing manhwa by using its subsidiary for children Sonyŏnhankookilbo 소년한국일보. In contrast to Hapdong, this company sought to publish and distribute manhwa with content considered suitable for teenagers, and it also attempted to break the monopoly, protect the rights of cartoonists, and normalize manhwa publishing and distribution.32 These efforts were encouraging enough to revive the manhwa industry, as this company had funding power and well-developed distribution channels. Unfortunately, Sonyŏnhankookilbo was in favor of copying and/or plagiarizing Japanese manga as well. Furthermore, instead of breaking up the monopoly in the manhwa market, it soon reached a share equal to that of Hapdong and thus became part of an oligopoly.

With growing political turmoil in Korea during the late 1950s, satirical manhwa began to criticize social and political compliance among the newspapers. Several cartoonists, such as Kim Seong-hwan 김성환, were fined for publishing manhwa that satirized the abuse of political power. Along with entertainment manhwa, the industry was considered a threat to public order and eventually became the subject of government control, particularly after Major-General Park Chung-hee 박정희 seized power in 1961. Under this military regime, the Korean government led campaigns against the manhwa cartoonists by denouncing them as morally and socially dangerous while their publishers were required to obtain official authorization to conduct their business.33 As part

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33 There were various items that were censored. For example, animals were not permitted to be the main characters in manhwa and could not be featured with their own dialogue. Intimate or sexual scenes were also not allowed since they went against the Confucian principals that prevailed in Korean society. Furthermore, violent scenes had to be edited; swords or knives were not allowed to be depicted—instead brooms and clubs were shown. For fight scenes, fists and/or hands should not be portrayed touching the opponent’s face and any featured violent scene should not take up more than three pages. Ironically, this eliminated most of
of this endeavor, the government even urged, on occasion, the public, teaching staff, and students to burn manhwa books at symbolic places and schools (Figure 2). Meanwhile, within society manhwa was considered to be outdated when compared with animated films.

In the 1970s, President Park wanted to further strengthen Korea’s economy by emphasizing the heavy and chemical industries. In this vein, animated science fiction films began to feature more on television and in movie theatres. Around this period, the government pushed Korea toward stronger forms of anti-communism. This movement induced animated film producers to depict stories on the struggle between good and evil that reflected the broader confrontation between North and South Korea. A few examples in this regard include Robot Taekwŏn V 로보트태권V and Let’s Run Mazinga-X 달려라 마징가 X. These animated films achieved surprising success in the country as televisions became more available to the average family. But even these were not free from suspicions of plagiarism when compared with Japanese content such as Mazinger Z マジンガーZ and UFO Robo Grendizer UFO ロボグレンダイザー respectively (Figure 6).

Figure 6. Comparison: Posters of Japanese animated films (the two on the left) and their Korean counterparts (the two on the right).

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34 Hong argues that Park Chung-hee also tried to change the mentality among the Korean people as he believed that most were not modernized, ibid. In many East Asian countries, burning books often symbolizes radical social, cultural, and political change. A good example is the Cultural Revolution (1966–1976) in China.


Like the relationship between the Japanese manga and anime industries, manhwa and animated films in Korea could have mutually reinforced each other and brought about synergies. Yet despite this promise, the Korean government considered manhwa substandard and a disruptive influence on public order. Thus, manhwa was discriminated against whereas animated films were positively embraced by the state as they were considered to be in line with the government’s goals: strong political power and economic development. Despite the significant growth in the Korean animated film market, its industry suffered in terms of production and creativity. This induced the industry to copy Japanese products as the manhwa industry had done before. Furthermore, the oligopolistic situation in the manhwa industry made this situation worse as it brought about a number of negative side effects while the government was able to easily control the manhwa industry due to the small number of industrial participants. These conditions hindered the industry’s development tremendously, and the consumers of manhwa subsequently shifted toward animated films.

**RESURGENT DEVELOPMENT OF THE MANHW A INDUSTRY**

*During the 1980s: Renaissance of manhwa and tough times for animated films*

In 1979, Park Chung-hee was assassinated, but hopes for political change were dashed after another army general, Chun Doo-hwan 전두환, seized power in a coup. His government began a process of suppressing political dissent around the country, which created strong negative feelings toward his rule and questions about his legitimacy. In order to placate such opposition, the Chun regime increased state support for museums and academies for traditional arts and funded the reconstruction of ancient palaces, tombs, temples, and other architectural sites while maintaining censorship and *ad hoc* policies.37

Since the Chun administration began to believe that there had been too much investment in the heavy and chemical industries, it sought to reverse the earlier policies. In such an environment, the government began to criticize animated films for portraying “absurd” science fiction stories which were thought to provide little or no educational value.38 In following these new guidelines, TV

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channels began to cancel such series of animated films.\textsuperscript{39} Furthermore, due to the stagnant Korean film market, they did not have enough investment to produce animated films that could be screened at movie theatres. This approach eventually hindered the broader development of the animation industry to some extent.

While the animation industry was in decline during the 1980s, there was an opportunity for the manhwa industry to emerge. Given that the government did not approve of science fiction during this time, most manhwa had to deal with other popular topics such as romance, sports, and current affairs. This allowed a broader range of genres to be produced and helped manhwa in Korea to enjoy a renaissance throughout the 1980s. In contrast to the manhwa from the 1960s and the 1970s, animals began to appear as lead characters with their own dialogue, a development which had been prohibited before.\textsuperscript{40} A good example in this regard is *Dooly the Little Dinosaur* (*Agigongnyong Tuli 아기공룡 둘리*). Crucially, these new manhwa publications expanded their target market by appealing not only to children but also to older generations and young women.

As manhwa regained its popularity, the number of rental shops began to grow again. This suggests that demand increased, as had happened in the 1950s. Furthermore, some publishers and cartoonists were able to meet such a demand condition. For example, *A Man Called God* or *Sinira Buliun Sanai 신이라 불리운 사나이* consisted of around 140 volumes and is still in print today. Such mass production was possible due to the specialization of work. Those who were not able to achieve mass production consequently disappeared.

Throughout the 1980s, Korean consumers became more accustomed to manhwa that were produced in long series rather than single-edition booklets. In this environment, Korean consumers’ perceptions of manhwa began to become more favorable. However, domestic producers were soon unable to provide an adequate supply to satisfy the growing demand. This naturally created a greater incentive to import manga from Japan that was suited to the new trends in Korea at the time. Several well-known Japanese manga series were once again imported unofficially due to the ban on Japanese cultural products (as described before), and this practice contributed toward Korean consumers becoming familiar with Japanese content. It also led the manhwa industry to pursue entertainment by increasing the amount of sexual and violent content.

\textsuperscript{39} Ibid.

\textsuperscript{40} Sohn, *Hanguk manhwa tongsa*. 
During the 1990s: Wavering hope for manhwa

As Korea entered the 1990s, it underwent several big changes including democratization. This helped Korean society to become more liberalized in expressing various ideas and views which had been censored by previous governments. In this environment, the Korean manhwa industry was able to expand further based on its strong performance in the 1980s, in particular in manhwa for younger generations. Several private companies entered the market by benchmarking Japanese manga magazines such as Shūkan Shōnen Champion 週刊少年チャンピオン. Due to the lack of supply from Korean manhwa, these private companies officially imported and published popular Japanese manga such as City Hunter シティーハンター, Dragon Ball ドラゴンボール, and Slam Dunk スラムダンク in the early 1990s. For these Korean companies, it was easier to enhance their success rate by importing and publishing well-known manga than by producing and publishing new content. As a result, the Korean manhwa industry became too dependent upon manga.

While the domestic market for manhwa expanded further with the import of Japanese manga, a vicious circle began to appear again. More Japanese manga was imported, which regardless of the quality of the work often contained popular themes of violence and sexual content, as had been the case before. Korean media outlets and older generations began to view manga and manhwa as educationally harmful for young people. For instance, City Hunter often portrays female nudity while Dragon Ball features a plot where a boy seeks to gain enough dragon balls to grant him his wish to obtain the underwear of girls. In response to this public outcry coupled with its efforts to prevent juvenile delinquency, the Korean government introduced the Juvenile Protection Act (Ch’ŏngsonyŏn pohobŏp 청소년 보호법) in 1997. The goal of this law was to preserve public peace and social order; however, due to the ambiguity in defining which manhwa would incur violence and lewd behavior among young people, this legislation was considered to be a form of official censorship.

To make the situation worse, at the end of 1997, Korea faced serious economic difficulties with the Asian financial crisis. The Korean manhwa companies had become too dependent on Japanese manga since the early 1990s, and

with a weak Korean won following the financial crisis, they had to pay more than double their expenditure to import manga. This resulted in a reduction in manga imports to Korea. The crisis also increased production costs by doubling the import prices for raw materials such as pulp, ink, and other printing materials. This challenging situation induced these Korean companies to work with local manhwa producers who had been struggling to survive amidst the flood of Japanese manga over the preceding years. Unfortunately, such manhwa was not popular among young people, who were more accustomed to Japanese manga. Hence, the profits of these magazines declined significantly.

Toward the end of the 1990s, President Kim Dae-jung (김대중, 1998–2003) opened up Korea’s market to Japan by lifting the ban on its cultural products and recognizing their copyrights. This was significant given that Japan was the second largest entertainment market in the world after the United States. Although this placed a greater burden on the Korean manhwa industry to differentiate itself from Japanese manga, this turned out to be positive because the industry had to look for new talent and creativity to remain competitive. Another important policy move was Kim Dae-jung’s plan known as “Cyber Korea 21” (사이버 코리아 21), an effort to enhance Korea’s economic development in the near future by boosting its internet and wireless infrastructure. Due to this effort, many local manhwa creators began to release their work online.

This process of informatization, driven by the internet, changed the consumption behavior among young consumers dramatically. As consumption of manhwa was through computers, these consumers were less self-conscious, which helped to significantly increase the size of the market during the 2000s. In addition, not only did it mean a transition from paper to screen but also created the notion that manhwa can be free content. This development led to a new “type” of manhwa, specifically webtoons. Although, the brief heyday of the Korean manhwa industry nearly came to an end, these events helped to foster a new environment that has had an additional positive impact upon the manhwa industry.

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From the 2000s until the present: The Resurgence of manhwa in a new market environment

As described before, manhwa has long been perceived among consumers in Korea as content suited mainly for young generations such as children and teenagers, which has hindered the expansion of the market in Korea. In recent years though, Korean companies have converted this disadvantage into an advantage. In other words, while Korean companies have continued to specialize in producing content for children, they have been able to successfully expand the market to the global level. Having acquired an enhanced creative capacity during the 1980s and 1990s, this changed environment for manhwa coupled with digitization helped the industry take off.

Although there have been manhwa that teach moral lessons for society or provide general knowledge on foreign countries and their history, the more recent educational manhwa for children tend to teach very specific subjects. For example, as English is the most important foreign language in Korea, The Gramgram English Grammar Expedition (Kraemgraem yŏngmunbŏp wŏnjŏngdae 그램그램영문법 원정대) and Gramgram English Vocabulary Expedition (Kraemgraem yŏngdanŏ wŏnjŏngdae 그램그램영단어 원정대) are particularly useful for children who are trying to learn and memorize English grammar and vocabulary. The Fantasy: War of Mathematics (P’ant’aji suhakdaejon 판타지 수학대전) aims to introduce and teach many mathematical concepts and formulas. The Magic Thousand-Character Classic (Mabŏpch’ŏnjun마법천자문) helps children to easily master one thousand Chinese characters, which is essential for understanding Korean literature more thoroughly (Figure 7).

Figure 7. Representative educational manhwa.47

This growth of educational *manhwa* has three important implications regarding policies, production, and the market. First, as this type of *manhwa* is for education, the government is less concerned about its content. Second, the distorted view toward *manhwa* has changed as this type of *manhwa* has proven itself to be beneficial to children. Hence, parents are willing to purchase such publications. Third, this type of *manhwa* reduces business risk because it can more easily guarantee a certain level of success for publishers. Furthermore, from the corporate perspective, the expansion of this content in terms of characters and storylines is easier than traditional *manhwa* as they must focus on the education aspect while the plot can be more open. For instance, the series *The Fantasy: War of Mathematics* is based on the myth of Atlantis while *Magic Thousand-Character Classic* takes the plot of *Journey to the West* (*Xī Yóu Jì*), a well-known Chinese fantasy novel. Given these advantageous aspects, educational *manhwa* has led to a growth in exports since 2011.\(^\text{48}\)

Meanwhile since the 2000s, Korean cartoonists have actively embraced the internet, which has led to the birth of webtoons—a compound of web and cartoon. Webtoons have emerged as a trend with the prevalence of smart devices. As a result, the *manhwa* industry has separated into two distinct parts: webtoons as online content and traditional forms as printed material. With the prevalence of smart devices, accessing webtoons does not require much time or space, while there are fewer economic restrictions. Given this freedom, webtoons have become popular among young generations who frequently use the internet through mobile devices. Furthermore, several mainstream Korean web portals such as Daum 다음 and Naver 네이버 helped to facilitate easier access for consumers by creating web pages dedicated to such content.\(^\text{49}\) This form of *manhwa* has been able to reach foreign consumers more easily than physically printed copies. In fact, webtoons have been popular across a range of other countries including China, France, Japan, and Spain.\(^\text{50}\) All of these aspects make it easier to expand the market for webtoons.

Webtoon creators have actively embraced digital technology. Initially, webtoons were a scanned copy of printed *manhwa*, but as the technology evolved, they added animation effects that repeat simple movements on the screen. Later, they embedded sound, flash, and other effects that consumers could enjoy. Along with this, a great deal of new talent has joined this sector. *The Bongcheon-Dong Ghost* (*Pongch’ŏndong kwisin* 봉천동 귀신) and *Ok-su Station Ghost* (*Oksuyŏk kwisin* 옥수역 귀신), both created in 2011, are good examples in this

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regard that attracted many Korean internet users to webtoons (Figure 8). As they have begun to feature more creative stories, many of them have increasingly become source material for dramas and films in Korea.

![Examples of webtoons.](image-url)

**Figure 8.** Examples of webtoons.

THE KEYS TO FURTHER ADVANCEMENT: A BUSINESS-FRIENDLY ENVIRONMENT AND GLOBALIZATION

Facing a larger market for educational manhwa and webtoons, the amount of “traditional” printed manhwa has significantly reduced over time, particularly with the emergence of the internet. This has created concerns within the manhwa industry and has led to criticism of this imbalance and calls for government help. In this regard, it is meaningful to examine how Japan has synergistically developed a number of manga such as the *Gundam* series in the 1980s. They were popular across multiple generations including both children and adult consumers. In particular, many other manga and animation series have been exported and gained significant international popularity. This achievement has emerged thanks to an effective market environment that emphasizes business activities with little in the way of subsidies or government intervention.

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51 The Bongcheon-Dong Ghost and The Ok-su Station Ghost are short horror stories. These webtoons include scenes such as a ghost’s bleeding face running into viewers and a ghost’s hand jumping out of the screen, both with sound effects.


It is often said in Korea that only children enjoy manhwa and animated films and that they lose interest as they get older. Yet, this assertion can be countered through several examples. For example, several animated films from Hollywood, such as Frozen (2013), were universally popular and enjoyed great box office success in Korea, suggesting the same could apply to manhwa or animated films. It is also important to recognize that the growing popularity of these animated films is due to effective business activities that seek to appeal to a wide range of consumers and to meet their varied demands and expectations. The overall lesson here is that if the Korean government wishes to boost its manhwa industry, then one of the tasks at the top of the list is to foster a business-friendly environment where these companies can regain their dynamism and the consumer view toward manhwa can become more favorable.

It is additionally important to understand that globalization and digitization play an important role too. For instance, the recent success of Korean animation series clearly demonstrates their impact despite the fact that they are only for children. They began to target young kids by providing them with educational stories in several different languages instead of only in Korean. The other key aspect is that many series were made available on YouTube, which has helped with the global diffusion of these animation series as well as the promotion of other derivative products that can be sold around the world. A few good examples are Pororo the Little Penguin (Pporongpporong ppororo 뽀롱뽀롱 뱃토로), Tayo the Little Bus (Kkomabŏsu t’ayo 꼬마버스 타요.), and Robocar Poli (Roboka p’oli 로보카 폴리), as well as Pinkfong’s Baby Shark (Agisangŏ 아기상어) (Figure 9). These successful examples hint at what can be achieved with the manhwa industry in the future.

Figure 9. Representative Korean animated TV series.\(^{55}\)

Under less interventionist policies, the whole industry can develop better and advance further as production interacts directly with consumption and publishers are able to offer what the market demands. However, the future transformation of the industry should not be judged by current standards. This interaction can open up unexpected opportunities, which may also change how the Korean public views manhwa. Eventually this will be helpful in transforming the perception of the industry.

CONCLUSION

With the expansion of Hallyu around the world, the Korean government has taken an interest in promoting the manhwa industry. Supportive policies have been introduced by successive governments. Despite such endeavors, the manhwa industry has shown only modest performance and lagged in development when compared with other cultural sectors. In this regard, it is important to analyze the core problem using an historical approach to introduce more effective policies that can fundamentally help boost the industry. This paper argues that the main reason for such results derives from negative perceptions formed throughout the history of the manhwa industry.

Due to manhwa’s satirical characteristics, this industry has often been subject to regulations passed by the government. Under such circumstances, the manhwa industry has not been able to fully develop in Korea. However, the government should understand that manhwa is an industry where business functions with both creativity and freedom of expression. Thus, the government should take on an advisory role, not seek to become an active participant. When governments intervene too much, the market’s autoregulation mechanism of supply and demand cannot function. This was clearly demonstrated by the early stage of manhwa’s development in Korea. By contrast, when government intervention was relaxed during the 1980s, the industry performed better than in previous years.

It is important not to overlook the critical role of business in industry. Fundamentally, business is the core agent that takes the role of production or sup-

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ply. When demand grows significantly, business seeks to take advantage of this opportunity under the principle “minimum input and maximum output.” Nevertheless, minimum input does not mean that business violates fair play. When the manhwa market grew in the late 1950s and 1990s, inappropriate business practices were conducted such as illegal imitation and piracy, and socially and ethically inappropriate content was produced to generate easy revenues. However, these practices not only created negative perceptions of manhwa among consumers, but also induced severe state intervention. This became part of a vicious circle which hindered the development of the manhwa industry. Thus, business should avoid a myopic attitude which could continue to hinder the long-term development of the industry.

It is crucial to point out a new aspect that has made the manhwa industry grow through differentiation and globalization. Previously, the market’s limited focus on teenagers and children was an obstacle for the development of the industry. This is no longer the case. Business has made this market more lucrative by enhancing the educational value of manhwa, incorporating topics such as the English language, mathematics, and Chinese characters, as described before. Furthermore, many of these manhwa publications have been distributed in different languages to reach a broader audience. In other words, globalization has significantly increased the size of the market. Webtoons have expanded by following the same path.

Without analyzing the fundamental reasons behind the lagged development of the Korean manhwa industry, many people in the industry have argued that it is small and will require government subsidies. When the global market share of Korean manhwa is compared with that of the United States and Japan, subsidies might seem attractive as a way to catch up. Yet, more often than not, they have unexpected negative effects on cultural industries. The full long-term effects of any potential subsidy regime for the manhwa industry should thus be carefully considered. In this regard, it would be more effective if efforts were undertaken to enhance the competitiveness of the industry by developing production capacity for manhwa in terms of quantity and quality while the government focuses on fostering a market-friendly environment with less state intervention. Ultimately, this could help further change negative perceptions of manhwa within society. It is very important to bear in mind that culture is not inherited but is in fact created.
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The Lagged Development of the Korean Manhwa Industry From 1910 to the Present


