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“Prospects of Global Marketing of Indian Footwear –A critical analysis “

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Abstract

The footwear sector is a very significant segment of the leather industry in India; rather it is the engine of growth for the entire Indian leather industry.

India is the second largest global producer of footwear after China, accounting for 13% of global footwear production of 16 billion pairs. India produces 2065 million pairs of different categories of footwear (leather footwear - 909 million pairs, leather shoe uppers - 100 million pairs and non-leather footwear - 1056 million pairs). India exports about 115 million pairs. **Thus, nearly 95% of its production goes to meet its own domestic demand.**

The major production centers in India are Chennai, Ranipet, Ambur in Tamil Nadu, Mumbai in Maharashtra, Kanpur in U.P., Jalandhar in Punjab, Agra, Delhi, Karnal, Ludhiana, Sonapat, Faridabad, Pune, Kolkata, Calicut and Ernakulam. About 1.10 million are engaged in the footwear manufacturing industry.

.Footwear exported from India are Dress Shoes, Casuals, Moccasins, Sport Shoes, Horrachies, Sandals, Ballerinas, Boots, Sandals and Chappals made of rubber, plastic, P.V.C. and other materials.

The Footwear sector is now de-licensed and de-reserved, paving the way for expansion of capacities on modern lines with state-of-the-art machinery. To further assist this process, the Government has permitted 100% Foreign Direct Investment through the automatic route for the footwear sector.

Conducive Investment climate towards attracting overseas investments and increasing cost competitiveness. The Government of India is setting up dedicated Footwear Complex and Footwear Components Part where footwear clusters are located.

Key words- Footwear industry, leather footwear, plastic footwear, textile footwear, synthetic footwear, export, etc

Footwear – Global Scenario and India’s share

The global import of Footwear (both made of leather as well as non-leather) increased from US\$ 124.43 billion in 2013 to US\$ 134.943 billion in 2017, growing at a CAGR of 2.1%. During 2017, the India’s share in the global import is 2%.

(In Million US\$)

	2013	2014	2015	2016	2017
Global import of Footwear	124312.959	131,819.943	127,818.701	128324.900	134,943.372
India's export of Footwear	2609.804	2990.733	2771.020	2747.900	2785.993
% Share of India	2%	2.27%	2.16%	2.15%	2%

India's Export of Different categories of Footwear

(Value in USD Mn)

	2013	2014	2015	2016	2017
Leather Footwear	2018.18	2207.17	2017.22	1952.44	1933.13
Footwear Components	320.15	361.29	284.34	298.69	335.24
Non-Leather Footwear	202.06	306.44	306.74	338.21	296.68
Total	2540.39	2874.9	2608.3	2589.34	2565.05

Source: DGCI& S

Footwear is the engine of growth of the leather industry in India. India's export of Footwear touched US\$ 1933.13 million in 2016-17, accounting for a share of 45 % in India's total export from the leather sector of US\$ 5739.93Mn.

- India's export of leather footwear had increased from US\$ 2018.18 million in 2012-13 to US\$ 1933.13 million in 2016-17.

India's export of footwear components had increased from US\$ 320 million in 2012-13 to US\$ 335.24 million in 2016-17

India's export of non-leather footwear has increased from US\$ 202.06 million in 2012-13 to US\$ 296.68 million in 2016-17

Major Markets:

During 2016-17, the main markets for Indian Footwear are USA with a share of 14.6%, UK 14.4%, Germany 12.2%, France 6.4%, Italy 4.8%, Poland 4%, UAE 3.7%, Spain 3.3%, Belgium 3.2% and Netherlands 2.5%. These 10 countries together accounts for 80.53% share in India's total footwear export.

Nearly 90% of India's export of footwear goes to European Countries and the USA. Future growth of Indian footwear in India will continue to be market driven. The European countries and the US are major consumers for the Indian footwear.

A Statement showing India's Export of Footwear to different countries (leather, non-leather and uppers): (Year 2013 to Year 2017)

India's Export of Footwear (Chp 64) to World, Country-wise													
Rank	Importers	Exports in USD (Mn)					CAGR in % 2013-17	% Change 2017/16	Share in %				
		2013	2014	2015	2016	2017			2013	2014	2015	2016	2017
	World	2609.8	2990.7	2771.0	2747.9	2786.0	1.6	1.4	100.0	100.0	100.0	100.0	100.0
1	United States of America	305.2	360.2	425.8	458.5	405.6	7.4	-11.5	11.7	12.0	15.4	16.7	14.6
2	United Kingdom	451.3	496.0	483.7	424.8	400.8	-2.9	-5.6	17.3	16.6	17.5	15.5	14.4
3	Germany	357.4	402.7	315.2	324.6	340.0	-1.2	4.7	13.7	13.5	11.4	11.8	12.2
4	France	193.0	208.2	175.7	162.8	178.9	-1.9	9.9	7.4	7.0	6.3	5.9	6.4
5	Italy	192.8	195.2	144.2	144.1	132.7	-8.9	-7.9	7.4	6.5	5.2	5.2	4.8
6	Poland	39.6	63.2	40.7	75.5	111.0	29.4	47.1	1.5	2.1	1.5	2.7	4.0

7	United Arab Emirates	106.7	178.8	170.2	118.0	102.3	-1.1	-13.3	4.1	6.0	6.1	4.3	3.7
8	Spain	124.1	135.4	114.3	102.2	91.0	-7.5	-11.0	4.8	4.5	4.1	3.7	3.3
9	Belgium	67.5	78.7	54.7	67.3	88.3	7.0	31.3	2.6	2.6	2.0	2.4	3.2
10	Netherlands	99.1	102.5	85.3	74.8	80.5	-5.1	7.6	3.8	3.4	3.1	2.7	2.9

Source: DGCI& S

Future Trends: - Keeping in view its past performance, current trends in global trade, the industry's inherent strengths and growth prospects, the footwear industry aims to augment production, thereby enhancing its exports from the current level of US\$ 1.73 billion.

Domestic Footwear Industry in India

The Domestic Footwear Industry in India is valued at approximately US\$ 3200 million, projected growth at 11 – 12% p.a.

- Organized retail is 25% and growing fast at 35-40% pa
- Footwear retailing constitute about 9% in the total consumer market.
- Men's footwear is about 50% of the market
- Branded footwear (including store labels) is about 50% of the market, driven by men's footwear largely
- Ladies and kids footwear, Sports Footwear also have vast potential in the domestic market

Source: Private Study by Reliance

Consumer preference for Footwear - Source: DMG Consulting Pvt Ltd, Noida

- *Consumers purchase footwear throughout the year and there is no fixed period/timing of purchase. However, the beginning of an academic session seems to be a peak time for purchase of footwear.*
- *A majority of consumers (over 75 percent) in metro and non-metro urban areas showed their preference for indigenous footwear and about 17 percent indicated no preference for indigenous or imported footwear. Surprisingly more than 10 percent of consumers in non-metros towns showed their preference for imported footwear as against only 6 percent in metro cities.*

About 55 percent of the consumers surveyed indicated preference for leather footwear while 45 percent preferred non-leather footwear. However, in non-metros town, more than 70 percent consumers preferred leather footwear and less than 30 percent preferred non-leather footwear.

Consumer preference

- *A little over 53 percent of consumers expressed their preference for branded footwear while around 27 percent showed their preference for non-branded footwear and 10 percent were found to be brand neutral. Interestingly the*

preference for branded footwear was more in non-metro towns in as much as 62 percent of consumers surveyed indicated preference for branded footwear.

- *As against popular perception, price of footwear apparently was not a major factor in influencing consumers preference. A majority (60 percent) of consumers would rather prefer quality of footwear.*
- *Expectedly, majority of consumers (58 percent) showed distinct preference for comfortable and durable footwear, although a significant 42 percent of consumers valued fashion and design of footwear.*

Competitiveness of Indian footwear vis-à-vis imported footwear

- *The natural advantage of Indian footwear industry in terms of factor endowments like availability of leather and cheap labour apparently has not been converted in to a comparative advantage in production. Import growth has tended to rise faster than growth of exports of footwear in recent years and this may at- least partly be reflective of the loss of competitiveness of exports. Taking unit value of exports and imports of some items as proxies of prices, it is observed that the unit value of imports in majority of footwear items whether leather or non-leather, is comparatively lower than unit value of exports of these items.*

Indian footwear industry poised for growth

India has state-of-the-art manufacturing plants. The footwear sector has matured from the level of the manual footwear manufacturing method to the automated footwear manufacturing systems. Footwear production units are installed with world class machines. Manned by skilled technicians, these machines help to turn any new innovative idea into reality. Support systems created for the sector have indeed served the footwear industry well. India has a well developed footwear component manufacturing industry. The future growth of the footwear industry in India will continue to be market-driven, and oriented towards EU and US markets. With technology and quality of the footwear improving year after year, Indian Footwear industry is stamping its class and expertise in the global footwear trade.

The global footwear market size was estimated at **USD 214.9 billion in 2019** and is expected to reach **USD 222.6 billion in 2020.**

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Report Attribute

Details

Market size value in 2020

USD 222.6 billion

Revenue forecast in 2025

USD 269.9 billion

Growth Rate

CAGR of 3.8% from 2019 to 2025

Base year for estimation

2018

Footwear refers to the garments that are worn on feet for protecting and covering the feet while walking from gravels on roads, ground texture, and temperatures among others. These come in numerous types of materials that include plastic, rubber, and fabric among others. The global footwear market is expected to witness a nominal growth throughout the course of the next five years primarily on account of the globally growing demand for footwear due to the growing population. Furthermore, the growing awareness regarding the use of shoes in underdeveloped countries and the growing purchasing power of the people working across these economies is also driving the market growth during the next five years.

Furthermore, the booming fitness trend among the millennials has led to an upsurge in sports activities such as gymming, cycling, aerobics, and others. This, in turn, is driving the demand for lightweight and highly comfortable athletic footwear in both developed and developing economies of the globe. Also, the growing involvement of old aged people in minor outdoor activities such as jogging, cycling, and walking among others has also amplified the demand for athletic footwear during the next five years. Major market players are also investing heavily in the market in the form of R&D investments, partnerships, and mergers with an aim to gain a competitive edge over other players and expand their market share also shows the potential for the market to witness a decent growth during the forecast period. Also, major players are taking necessary steps to attract more customers and boost sales such as developments in designs, comfort, and advanced technologies for adding more durability and comfort to the footwear also shows the market growth potential in the coming years. Furthermore, the expansion of distribution channels coupled with the rapid adoption of market players to boost their sales on online sales channels is also one of the major factors supplementing the global footwear market growth throughout the forecast period.

Furthermore, the market is also poised to witness a growth on account of the growth in the number of sports events globally. Many market players partner with sports clubs, teams, and players and become an official sponsor of the teams. Thus, a growing number of sports events such as cricket, football, hockey, and others and the growing importance of sports is also one of the additional factors that is positively impacting the market growth in the coming years.

However, the market is expected to be restrained by the fact that there is a wide availability of counterfeit products in the market that are available at considerably low prices. Also, there are several government restrictions being imposed regarding the use of leather products. Additionally, the recent outbreak of the novel coronavirus disease is expected to inhibit the market growth to some extent during the short run owing to the fact that the government restriction and other measures such as lockdowns further led to a temporary closure of malls, showrooms, and shops in many parts of the world, which further impacted the sales negatively. Also, the disruption in the supply chain caused by trade restrictions and non-availability of labor further led to a temporary halt in the manufacturing activities across several industries. Thus, all the factors mentioned above are projected to hamper the market growth moderately to some extent during a short period of six to eight months. However, the outlook of the market looks positive after the short run as the expansion of distribution channels and the rising popularity of online sales amid the pandemic are likely to give a positive outlook to the market after the period of the next six to eight months.

Globally growing population

One of the major factors driving the demand for footwear globally is the growing population. As the population continues to grow the increasing number of people that use footwear directly affects the demand for new footwear. According to the statistics from the World Bank Group, the global population reached 7.674 billion by the year 2019 from 6.922 billion in the year 2009. Furthermore, the changing consumer lifestyles

have led to upgradation in fashion as well. This combined with the improvement in the standards of living of the people along with rapid urbanization is also supplementing the globally growing demand for footwear until the end of the forecast period.

The global footwear market has been segmented on the basis of type, end-user, distribution channel, and geography. By type, the classification of the market has been done into athletic, and non-athletic. By the end-user, the segmentation of the market has been done as men, women, and children. By distribution channel, the market has been segmented into online and offline. Geographically, the global market has been segmented as North America, South America, Europe, Middle East and Africa, and Asia Pacific.

Men's segment to hold a considerable share

By the end-user, the men's segment is anticipated to hold a substantial amount of share in the market throughout the forecast period. The presence of a comparatively larger proportion of the male population base around the globe is a key factor bolstering the significant share of this segment in the next five years. Also, the increasing focus of males towards fashion and growth in the spending on apparel and footwear is also one of the key factors augmenting the growth of this segment until the end of the forecast period. Furthermore, the growing acceptance of casual wear across the corporate sector also acts as a major driving factor supplementing the growth of this segment during the forecast period.

However, the women's segment is projected to show promising growth during the next five years. The key factors expected to boost the growth of this segment include the increasing number of working female population in both developed and developing economies of the globe. Additionally, the growing disposable income and improvement in the standards of living along with the rising fashion consciousness among the females further provide an impetus to the market to grow in the coming years.

Athletic footwear to show robust growth

By type, the non-athletic footwear segment is expected to hold a substantial share in the market owing to the fact that there is a constant increase in the number of working professionals globally. Furthermore, the presence of a wide variety of shoes in this segments further supports the dominance of this segment over the course of the next five years. Furthermore, the presence of a wide number of shoe manufacturers offering custom designs and textures tailored as per the needs and preferences of the consumer further is also bolstering the market growth of this segment in the coming five years.

However, the athletic footwear segment is anticipated to witness a robust growth over the course of the next five years primarily due to the fact that the growing health concerns have led to an upsurge in the sports activities in many parts of the world. Furthermore, the emerging fitness trend in both millennials and old aged people has led to an increased demand for athletic shoes for all age types. Additionally, an increase in the number of sports events is also positively impacting the growth of this segment during the next five years.

Offline to hold a substantial share

By distribution channel, the offline segment holds a substantial market share throughout the course of the next five years owing to the fact that consumers are reluctant towards the purchase of shoes online due to counterfeit product issues. Furthermore, the sense of personal touch regarding comfort and material of footwear further plays a significant role in driving the offline sales of footwear during the forecast period. The online segment is projected to show robust growth over the next five years. The booming smartphone and internet penetration coupled with the presence of attractive discounting policies is further attracting the customers to opt for online channels for the purchase of numerous commodities.

APAC to hold a significant share

Geographically, the Asia Pacific region is expected to hold a significant market share throughout the forecast period on account of the presence of a comparatively larger population base. Furthermore, the increasing disposable income and changing lifestyle of the people across the emerging economies such as India and China

among others is further propelling the growth in the APAC region during the next five years.

Competitive Insights

Prominent/major key market players in the global footwear market include Nike Inc., Adidas AG, Puma SE, Skechers USA Inc., Bata Corporation, and Asics among others. The players in the global footwear market are implementing various growth strategies to gain a competitive advantage over its competitors in this market. Major market players in the market have been covered along with their relative competitive position and strategies and the report also mentions recent deals and investments of different market players over the last few years. The company profiles section details the business overview, financial performance (public companies) for the past few years, key products and services being offered along with the recent deals and investments of these important players in the global footwear market.

Segmentation

By Type

- Athletic
- Non-Athletic

By End-User

- Men
- Women
- Children

By Distribution Channel

- Online
- Offline

By Geography

- North America
- USA
- Canada
- Mexico
- South America
- Brazil
- Argentina
- Others
- Europe
- Germany
- France
- UK
- Spain
- Others
- Middle East and Africa
- Saudi Arabia
- UAE
- Others
- Asia Pacific
- China
- India
- Japan
- South Korea

- Australia
- Others

About Indian Footwear Industry

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% Share of India	2%	2.27%	2.16%	2.15%	2%

Source: ITC, Geneva & DGCI &S, Kolkata

Global Footwear import includes leather & non-leather

India's Footwear includes – Leather, non-leather and leather uppers

India's Export of Different categories of Footwear

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Major Markets:

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Nearly 90% of India's export of footwear goes to European Countries and the USA. Future growth of Indian footwear in India will continue to be market driven. The European countries and the US are major consumers for the Indian footwear.

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3	Germany	357.4	402.7	315.2	324.6	340.0	-1.2	4.7	13.7	13.5	11.4	11.8	12.2
4	France	193.0	208.2	175.7	162.8	178.9	-1.9	9.9	7.4	7.0	6.3	5.9	6.4
5	Italy	192.8	195.2	144.2	144.1	132.7	-8.9	-7.9	7.4	6.5	5.2	5.2	4.8

6	Poland	39.6	63.2	40.7	75.5	111.0	29.4	47.1	1.5	2.1	1.5	2.7	4.0
7	United Arab Emirates	106.7	178.8	170.2	118.0	102.3	-1.1	-13.3	4.1	6.0	6.1	4.3	3.7
8	Spain	124.1	135.4	114.3	102.2	91.0	-7.5	-11.0	4.8	4.5	4.1	3.7	3.3
9	Belgium	67.5	78.7	54.7	67.3	88.3	7.0	31.3	2.6	2.6	2.0	2.4	3.2
10	Netherlands	99.1	102.5	85.3	74.8	80.5	-5.1	7.6	3.8	3.4	3.1	2.7	2.9

Source: DGCI& S

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footwear and 10 percent were found to be brand neutral. Interestingly the preference for branded footwear was more in non-metro towns in as much as 62 percent of consumers surveyed indicated preference for branded footwear.

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