THE 39TH INTERNATIONAL FOOTWEAR CONFERENCE 第 39 屆 國 際 鞋 業 會 議



FOOTWEAR REGIONAL COOPERATION & INNOVATION

鞋 業 創 新 與 區 域 合 作



主辦機構 Organiser





工業貿易署「工商機構支援基金」撥款資助 Funded by Trade and Industrial Organisation Support Fund, Trade and Industry Department



工商機構支援基金 Trade and Industrial Organisation Support Fund 執行機構 Implementation Agent





CONTENT / 目錄

| Introduction / 引言 | 2 |
|---|-----|
| Speech from Chairman of the 39th IFC / 第 39 屆國際鞋業會議主席致辭 | 4 |
| Speech from CIFA Secretary General / CIFA 秘書長致辭 | 5 |
| Country and Region Reports / 國家及地區報告 | |
| Bangladesh / 孟加拉 | 8 |
| Cambodia / 柬埔寨 | |
| China (Beijing) / 中國北京 | |
| China (Guangdong) / 中國廣東 | 38 |
| Hong Kong / 中國香港 | 44 |
| India / 印度 | 52 |
| Indonesia / 印度尼西亞 | 6C |
| Korea / 韓國 | 72 |
| Malaysia / 馬來西亞 | 78 |
| Myanmar / 緬甸 | 86 |
| Philippines / 菲律賓 | 92 |
| Taiwan / 中國台灣 | 104 |
| Thailand / 泰國 | 112 |
| Vietnam / 越南 | 122 |
| Open Discussion Forum / 開放式論壇 | |
| Smart Manufacturing & Industry 4.0 - Mr. Lyan Law | 132 |
| The Regional Comprehensive Economic Partnership (RCEP) andother agreement (e.g. CEPA) - Mr. David Sit | |
| New sustainability metrics in footwear industry in APAC - Mr. William Wong | 134 |
| Post Covid-19 Business strategies in APAC - Dr. Michael Kwong | 135 |
| | |

INTRODUCTION / 引言

Getting To Know About The International Footwear Conference (IFC) & The Confederation of International Footwear Association (CIFA)

In the middle of 1960, Hong Kong, Korea, Japan, and Taiwan were the four main footwear exporters in the Asian market. They were competitors and colleagues as well. They needed to have a platform to share opinions and they started the first edition of the International Rubber Footwear Manufacturers Conference in Taipei, Taiwan in May 1971.

The four founding member footwear associations were Hong Kong Rubber & Footwear Manufacturers Association, Japan Rubber Footwear Manufacturers Association, Korean Footwear Industries Association, and Taiwan Footwear Manufacturers Association.

During the meeting, they talked about the supply of shoe materials, labor costs, annual report on regional footwear sectors, imports and exports issues and they had decided that the meeting should be held once a year and the four associations should play as the host of the Conference in turn. They agreed to set a motto for the Conference "Production for Marketing, Marketing with Profit".

In 1982 when the 12th International Rubber Footwear Manufacturers Conference was held in Hong Kong, the conference name was changed to "The 1st International Footwear Conference" (The 1st IFC).

Membership of the IFC increased from time to time, at present, the IFC consist of 15 members associations, namely:

- Hong Kong Footwear Association (founding and member association of IFC in 1971)
- Korean Footwear Industries Association (founding and member association of IFC in 1971)
- Taiwan Footwear Manufacturers Association (founding and member association of IFC in 1971)
- Indonesian Footwear Association (member association of IFC in 1992)
- Thai Footwear Industry Club-The Federation of Thai Industries (member association of IFC in 1982)
- The Association of Guangdong Shoes Manufacturers (member association of IFC in 1994)
- Vietnam Leather & Footwear Association (member association of IFC in 1996)
- Malaysian Footwear Manufacturers Association (member association of IFC in 1997)
- Philippine Footwear Federation Inc. (a member association of IFC in 1998)
- Filipino-Chinese Footwear & Allied Industries Association (a member association of IFC in 1998)
- Council for Leather Exports- India (a member association of IFC in 2000)
- China Leather Industry Association (a member association of IFC in 2001)
- Leathergoods & Footwear Manufacturers & Exporters Association of Bangladesh (a member association of IFC/CIFA 2015)
- Cambodia Footwear Association became a member of CIFA in 2019
- Myanmar Footwear Manufacturing Association became a member of CIFA in 2019.

The purpose and the vision of the IFC are to build up a friendly platform for the global shoe and allied industries, for exchanging business information among members, discussing the possibility of business collaborations, seeking opportunities to promote win-win technical cooperation in the shoe sector, working together for a better tomorrow for the shoe and allied industries. Over the past and current years, we are very much thankful to all our member associations, we work together to build up the core value of the IFC/ CIFA - Internationalization, Fraternization, Cooperation and Appreciation.

The 39TH International Footwear Conference 第 39 屆 國 際 鞋 業 會 議



As we recall that during the 26th IFC meeting in Chennai, India in 2007 and the 27th IFC meeting in Jakarta, Indonesia in 2008, the IFC members discussed and decided that the 1st edition of the International Footwear Design Competition (IFDC) to be held in Guangzhou concurrently with the Shoes & Leather International Exhibition 2009 in Guangzhou in China. The IFDC organizer was the IFC and the co-organizers were the IFC member associations. The supporters and sponsors were Top Repute Co., Ltd. (from 2009 till 2020), Hong Kong Two/Ten International Footwear Foundation (from 2009 till 2011) and Sabatina Wellness Shoe- Peninsular Shoers Co., Ltd. (Hong Kong, from 2011 till 2017) and (from 2018 till 2020 sponsored by the Xin Hao Pan International Group, Guangzhou) The IFDC was held once a year in Guangzhou concurrently with the Shoes & Leather International Exhibition.

During the 29th IFC meeting in Ho Chi Minh City, Vietnam in 2010 and the 30th IFC meeting in Kuala Lumpur, Malaysia in 2011, the IFC discussed and decided to establish an organization and at the 31st IFC meeting in Manila, The Philippines, in 2011 the name of the organization was named and to be registered as "Confederation of International Footwear Association" in Hong Kong. A Certificate of Incorporation was issued on February 20, 2013, to the Confederation of International Footwear Association Limited in Hong Kong. The main activities of the Confederation of International Footwear Association (The CIFA) is to organize International Footwear Conference (IFC) and to organize the International Footwear Design Competition (the IFDC). The IFC member associations are thus accordingly to be the member associations of the CIFA.

- The 32nd IFC was hosted by Japan Footwear Federation on October 6~8, 2013 in Tokyo, Japan.
- The 33rd IFC was hosted by Council for Leather Exports- India on November 14~16, 2014 in Agra, India.
- The 34th IFC was hosted by Korean Footwear Industries Association on November 5~7, 2015 in Busan, Korea.
- The 35th IFC is hosted by Taiwan Footwear Manufacturers Association on November 10~12, 2016 in Taipei, Taiwan.
- The 36th IFC in 2017 was hosted in Dhaka, on November 14th~16, 2017 in Bangladesh, by Leathergoods & Footwear Manufacturers & Exporters Association of Bangladesh (LFMEAB).
- The 37th IFC was held in Bangkok, Thailand on September 12~14, 2018 was hosted by the Thai Footwear Industry Club The Federation of Thai Industries.
- The 38th IFC in 2019 was hosted by the China Leather Industry Association and the Association of Guangdong Shoes Manufacturers in Guangzhou during 26~29, May 2019; Cambodia Footwear Association, and Myanmar Footwear Manufacturing Association both became members of CIFA by the approval of the 2019 CIFA Board of Directors meeting on 27th May 2019 in Guangzhou, China.
- Pakistan Footwear Manufacturers Association was invited to attend the 38th IFC as an Observer.
- The 39th IFC in 2022 will be hosted by Hong Kong Footwear Association on November 14, 2022, in Hong Kong, China.
- The 40th IFC in 2023 will be hosted by the Indonesian Footwear Association.

Again we take this opportunity to give our heartfelt thanks to all our CIFA member associations for your kind and continuous support of the IFC and the IFDC events, we wish you great success in your present business and the best of luck in your future careers.

Sincerely, Frank Z Kung Secretary-General IFC / CIFA

Speech from Chairman of the 39th IFC 第 39 屆國際鞋業會議主席致辭



Ladies and Gentlemen.

On behalf of Hong Kong Footwear Association, it is my honor to welcome you to the 39th International Footwear Conference (as known as IFC) 2022 in Hong Kong.

The 39th IFC invited all members of the Confederation of International Footwear Association (CIFA), whose locations include China, Vietnam, Thailand, Philippines, Malaysia, Myanmar, South Korea, Indonesia, India, Cambodia, Bangladesh, Taiwan, Hong Kong and elsewhere, each member represents a major footwear association in their region. The footwear production of the CIFA members regions exceeds 80% of the global supply. That is a remarkable number and make CIFA an important organization.

Since now we have the leaders of major footwear association all over the world come together, it is a great opportunity to exchange market information, explore business opportunities, and enhance production technologies for sustainable environment. In this event, we have addressed the agenda for smart manufacturing, the latest trade initiatives and regional cooperation, the sustainability metrics in footwear industry, and post covid19 business strategies.

Last but not least I am thankful to CIFA directors and members, either you come to Hong Kong or online participation to make this conference happen. I sincerely thank for the Trade and Industrial Organisation Support Fund of the Trade and Industry Department, HKSAR Government for funding support, Hong Kong Productivity Council for event execution, my committee colleagues to drive and deliver the results over the past few months.

I wish very success of the 39th International Footwear Conference in Hong Kong.

Thank you very much.

Eddie Lam

President Hong Kong Footwear Association



Speech from CIFA Secretary General CIFA 秘書長致辭



Honorable Authorities, Distinguished Guests, Dear Colleagues and Friends, Ladies and Gentlemen,

Good Morning and Have a Good Day. A cordial welcome to the 39th International Footwear Conference! It is really, quite a long time no see! It is a great pleasure and privilege for me to be with you either in person or via zoom meeting, You honor this 39th edition of the International Footwear Conference (39th IFC) with your participation.

Thank you for coming to the CIFA event on 14th November of the year 2022.

First of all, we would like to give our heartfelt thanks to Hong Kong Government Authorities for the full and continued support of the Hong Kong Footwear Association (HKFA) over the years.

Our big thanks also go to Mr. Jacky LAM, Chairman of the CIFA and the President of HKFA, together with his organizing committee including Mr. Tommy FONG, Dr. Ben CHUEUNG, Mr. Frandle TSE, and Mr. Randy YAU for all your unwavering support and crucial efforts to host and organize this wonderful and splendid event.

The purpose and the vision of the IFC are to build up a sustainable and friendly platform for the international footwear industry. Because of this notable purpose, our goal's vision is:

- 1. To build up a friendly platform for the shoe and allied industries.
- 2. To exchange business information among members.
- 3. To discuss the possibility of business collaboration.
- 4. To seek opportunities to promote win-win technical cooperation in the shoe sector.
- 5. To work together for a better shoe industry pay more attention to Environment, Social Responsibility, and Governance.

At this point, we might add a special notation to our "IFC" and "CIFA"

- " I " stands for "Internationalization"
- "F" stands for "Fraternization"
- "C" stands for "Cooperation"
- " A " stands for " Appreciation"

Now, let us give thanks again to all members of the Hong Kong Footwear Association and all participants, together, we make this 39th IFC an event to remember!

In accordance with the circumnavigating order, the 40th IFC will be hosted by the Indonesian Footwear Association and all details will be decided by the Indonesian Footwear Association as well.

I take this opportunity to extend my profound thanks to all the CIFA colleagues and all overseas and national delegates at the 39th IFC event, I wish you and the event all success!

Frank Z Kung

Secretary General of CIFA

Country and Region Reports

國家及地區報告







Country Report for 39th International Footwear Conference 2022

BANGLADESH

1

Bangladesh country facts overview



- ☐ Proximity to two fastest-growing and biggest economies.
- ☐ Currently, 65 % of the total population of 166 mn is of working age
- □ 38% urban
- □ 2 mn people new workers annually
- ☐ The 41st largest economy in the world
- ☐ GDP of over \$400 billion
- ☐ Set to graduate from least developed countries (LDCs) to join the developing countries club by 2026.
- ☐ Will surpass UK and Germany and become the world's ninth-largest consumer market by 2030



INFRASTRUCTURE DEVELOPMENT



Dhaka Elevated Expressway to connect Dhaka airport to Kamalapur railway station, Dhaka

Rooppur Nuclear Power Plant 2160MW

Padma Multipurpose Bridge

Padma Rail Link

Rampal Coal Power Project 1320MW

100 Special Economic Zones



Dhaka Metro Rail

Dhaka-Chattogram Express Railway

Matarbari Coal Power 1200MW

Karnaphuli Underwater Tunnel

Chattogram-Cox's Bazar Railway Link

BAY TERMINAL PROJECT

Especied to be complete in 2008

Will have road, rail connectivity

Ship fares to reduce by 30-40%

Stip fares to reduce by 30-40%

Container handling will increase by 50 takin

Component | Container Terminal | Container Terminal | English | Container Terminal | Container Terminal

Leather, leather products, footwear, and synthetic industry: a snapshot



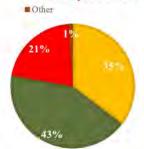
- □ Up to 85% value addition.
- ☐ Highly labor-intensive industry with 60%+ women workforce
- □ 200,000+ people actively employed and indirectly employed 150,000+ people.
- ☐ Sector includes 200 tanneries, 3500 SMEs, 90 Large Firms and 15 big enterprises
- ☐ Major markets: Germany, US, Japan, Netherland, Spain, Italy, UK, Belgium, France, Poland, Russia and Canada.
- □New and emerging markets: Turkey, South Korea, Brazil, Mexico, South Africa, Australia, Russia, China and UAE.

Emerging Backward Linkage Industry

Recently, there are some companies who are producing shoe accessories commercially such as:

- ☐ Shoe Last
- ☐ Outsole
- ☐ Insole
 ☐ Adhesive
- ☐ Foam
- ☐ PU leather
- ☐ Ornaments ☐ Shoelaces

TYPES OF FOOTWEAR TRADED (PAIRS) Leather footwear Textile footwear Rubber & plastic footwear



(Source: World Footwear Yearbook 2022)

4



COMPETITIVE ADVANTAGE



- ☐ Competitive and scalable labour force
- ☐ Preferential Market Access EU, Japan, Korea, Australia, India, China
- ☐ 300ml sqft Domestic Raw material availability | 1.7% of global livestock
- ☐ Emerging supply chain packaging, lasts, adhesives, outsoles
- ☐ Made in BD shoes and bags gaining ground: Timberland, Wolverine, Michael Kors, Decathlon, Picard
- ☐ Rising Foreign direct investment and local investment
- ☐ Established sea and air connectivity and also logistics.
- ☐ Containerized shipment is available from the factory site
- ☐ A perfect sourcing diversification opportunity for manufacturing
- ☐ Proactive compliance practice LEED, WRAP, BSCI, LWG, CTPAT.
- ☐ Rising middle-class purchasing power
- ☐ Large domestic market.

ś

Industry performance

Footwear industry in a snapshot



| | Val | Value | | Quantity | |
|-------------|---------------|------------|---------------|------------|----------|
| | Million (USD) | World Rank | Million Pairs | World Rank | USD |
| Exports | 1160 | 16 | 83 | 16 | \$ 13.89 |
| Imports | 85 | 84 | 15 | 90 | \$ 5.82 |
| Production | | | 401 | 8 | |
| Consumption | | | 333 | 10 | |

Bangladesh's leather, leather products and footwear export in 2019, 2020, 2021 (Value in Mn. US\$)

(Source: World Footwear Yearbook 2022)





Domestic Market Landscape



Domestic Market

\$600m+ Market Value
300m pairs sold annually
55% informal market
10% annual growth rate
03 pairs / person / year

Major local footwear brands

- ☐ Apex Footwear
- □ Bata Shoe
- ☐ Jennys Shoes
- ☐ Bay Emporium
- □ Leatherex
- ☐ Step Footwear
- □Lotto BD
- ☐ Walker Footwear
- ☐ Zeil Wears

Import markets

| IMPORT MARKETS | Million (USD) | Value Share | Million Pairs | Quantity Share |
|-------------------|---------------|-------------|---------------|-------------------|
| CHINA | 80.9 | 96% | 13.62 | 94% |
| INDIA | 1,5 | 2% | 0.43 | 3% |
| SINGAPUR | 0.7 | 1% | 0.19 | 1% |
| HONG KONG | 0.7 | 1% | 0.11 | 1% |
| CAMBODIA | 0.2 | 0% | 0.05 | 0% |

(Source: World Footwear Yearbook 2022)

Sectoral steps

Sectoral transformative initiatives



EC4J

Million-dollar WB projects to increase industry effectiveness:

- ☐ Market Access Support Program (ESQ): training on social compliance, OHS, compliance, waste management, etc.
- ☐ Productivity Enhancement Program (TC)
- ☐ Technology & Design Centre (TDC)

Skill development

Bangladesh government and industry are executing skill training for further 10,000 unskilled trainees for the leather goods and footwear sector by December 2023.

Environmental sustainability

- ☐ Under the ECOLEBAN project, LFMEAB has implemented Sustainable Consumption and Production (SCP) in five SMEs and Ecolabelling in 11 SMEs
- ☐ Implementation of Environmental Management Systems (ISO 14001) in 13 factories.

SOLIDARIDAD

Training on Promoting Safe Use Of Chemicals (PSUC)

Special initiatives

- Capacity building program for strengthening factories Participatory, Safety & Anti Harassment Committees
- ☐ Factory Improvement Program to improve Environmental & Social Compliance, OHS and Fire & Electrical Safety
- ☐ Develop Factory Improvement Tools (FIT) to increase productivity
- ☐ Job Placement of 1,000 ultra poor women through skill development
- ☐ Developing a job portal under National Intelligence for Skills, Education, Employment and Entrepreneurship (NISE) for match making between employers and job seekers.

Potential investment areas □ EVA / PU Slippers □ EVA Outsoles / PU Upper ☐ PU leather ☐ Shoe Last ☐ Ornaments ☐ Outsole ☐ PU uppers for variation ☐ Insole ☐ Textile / Knit upper ☐ Shoelaces ☐ Canvas & PVC shoes Packaging ☐ Army boots/Safety shoes ☐ Lasts ☐ Ladies boots ☐ Adhesive, ☐ Jute sandals Outsoles ☐ Shoebox ☐ Light sole ☐ Foam

Investment opportunities & government support



- ☐ Leather sector as focus industry under non-traditional market & product diversification
- ☐ Government offers exclusive economic zone: 8-EPZ in operation and target to establish 100 EPZ & SEZ by 2030
- ☐ Foreign and joint venture investments are encouraged in leather products and footwear industry
- ☐ Duty free import of components (Bond) facilities for 100% export oriented leather industries
- Duty and tax draw-back facility for exporters
- ☐ 100% foreign ownership permissible
- ☐ Enjoy MFN (most favored nation) status
- ☐ No ceiling on foreign and local investment
- ☐ Duty free import of machinery
- ☐ Relief from double taxation
- □ BIDA's online One Stop Service (OSS) portal is a single-window platform for availing investor services in Bangladesh. At present, 58 online services are available, of which 18 services are from BIDA and 40 from 18 other government and private agencies.



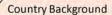








Business in Cambodia



- Infrastructures
 (Airport/Ports/Highway)
- 2. Young Population (72% U35)
- 3. Location-Hub of ASEAN
- 4. USD- No FOREX control
- Key sectors

 Agriculture/ Manufacturing/ Tourism/ Construction)

Industry Development

- New Investment Law (Tax holiday up to 9 years)
- Trade Preference (RCEP, FTA-CH/KR, EU-EBA, US-GSP)
- 3. Export Value 70% (G:8bn/ F:1.4bn/ T:1.4bn)
- Export Market US/EU/UK/CA/JP/CN
- 5. International Brands
- 6. ILO BFC- Made in Cambodia
- 7. 1,000+ factories
- 8. 1m labor force

M-M-H CFA

Association Activities

- Industry representative (GMAC/ CFA/ CTLA/ CAMFEBA/ IBC/ BSE...)
- Advisory service & information dissemination
- 3. Trade & Business promotion
- 4. Corporate Social Responsibility

1











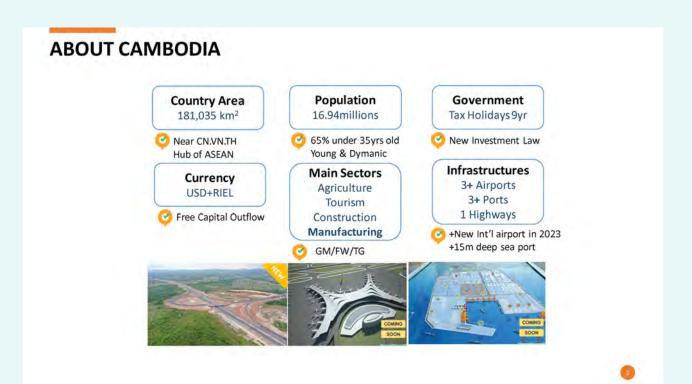
3



BUSINESS IN CAMBODIA

- ☐ ABOUT CAMBODIA
- ☐ INFRASTRUCTURES DEVELOPMENT
- ECONOMIC STATUS





Hub of ASEAN



- Center of ASEAN: flight time average only 1:30 hour to other ASEAN countries
- Borders: Laos, Thailand Vietnam

Б



Infrastructures development (cont.)

AIRPORT

- Phnom Penh International Airport (PNH)
- ■ ᠅ New Phnom Penh International Airport (PNH)-2023
- Siem Reap International Airport (REP)
- Sihanoukville International Airport (KOS)
 - Tourism
 - Cargos









7

Infrastructures development (cont.)

PORT

- KHSIH- SEA PORT Main deep-sea port of Cambodia.
- KHPPH- RIVER PORT

Phnom Penh-Vietnam

KHKKZ-SEA PORT

15 km to Thai border

(Under construction)

International 15m deep-sea port



8



Infrastructures development (cont.)

Highway

PHNOM PENH-SIHANOUKVILLE (Oct, 2022)

> Capital- KHSIH export port Total 190km (5hr -> 2.5hr)

PHNOM PENH -BAVET (under investigation)

Phnom Penh-Bavet (Vietnam border)

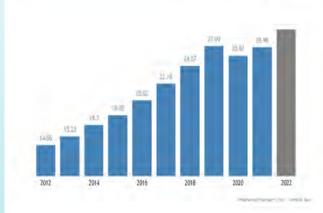


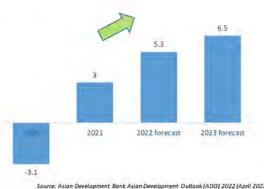


ECONOMIC STATUS

GDP GROWTH RATE - CAMBODIA

The Gross Domestic Product (GDP) was worth USD26.96 billion (2021, World Bank). The GDP value of Cambodia represents 0.02 percent of the world economy.

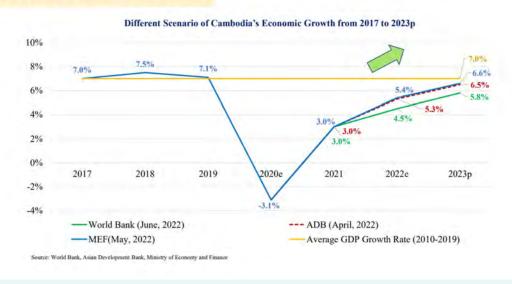


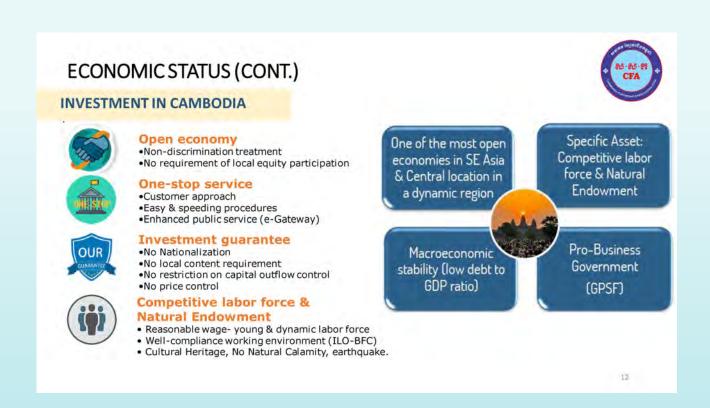




ECONOMIC STATUS (CONT.)

GDP GROWTH RATE - CAMBODIA





11



ECONOMIC STATUS (CONT.)



INVESTMENT IN CAMBODIA

The National Bank of Cambodia (NBC) has announced that the FDI (Foreign Direct Investment) into the Kingdom grew by 11 % in 2021, with a variety of nations investing.

NBC posted on their social media platforms, "Foreign direct investment in Cambodia as of the end of 2021 remained robust with a growth rate of 11.2% over the previous year. The increase was contributed by the investment from China, South Korea, Vietnam, Singapore, Japan and Malaysia into the finance, manufacturing, real estate, hotel and restaurant, agriculture, and construction sectors.

- 12

ECONOMIC STATUS (CONT.)

INFLATION RATE

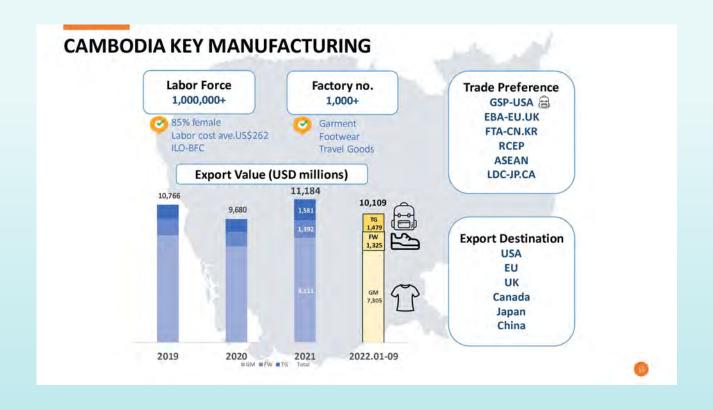
From 2017 to 2021, the gap between actual and projected inflation rate was on average -0.7 percentage point. In contrast, in 2022, the gap is 2.2 percentage point.



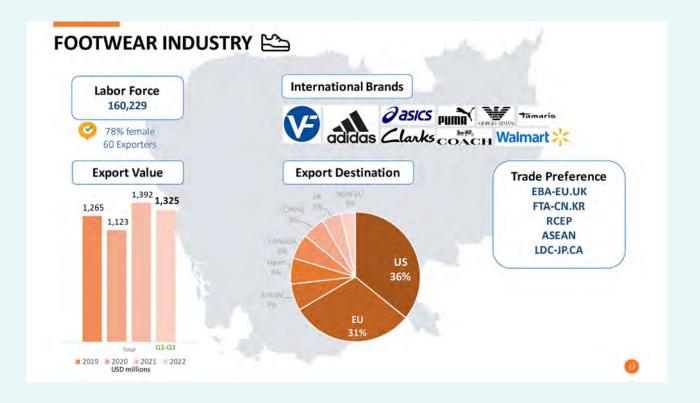
1.0

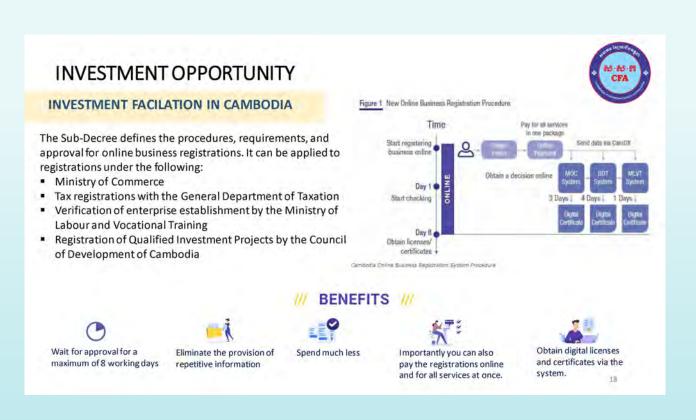














INVESTMENT OPPORTUNITY



TAX BENEFITS FOR QUALIFIED INVESTMENT PROJECT (QIP) IN CAMBODIA



TRIGGER PERIOD

The trigger period begins on the date the final registration certificate is issued, and it ends on the last day of the fiscal year immediately preceding the fiscal year that the QIP derives a profit, or the third fiscal year after the fiscal year in which the QIP generates any income, whichever is earlier.



THREE-YEAR PERIOD

The three-year period commences from the fiscal year that immediately follows the trigger period.

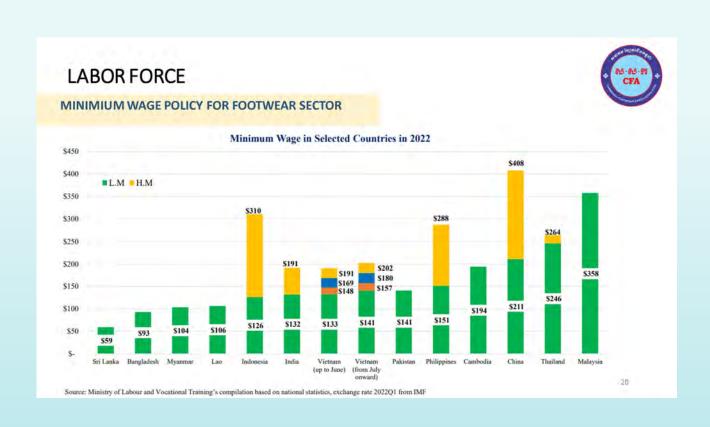




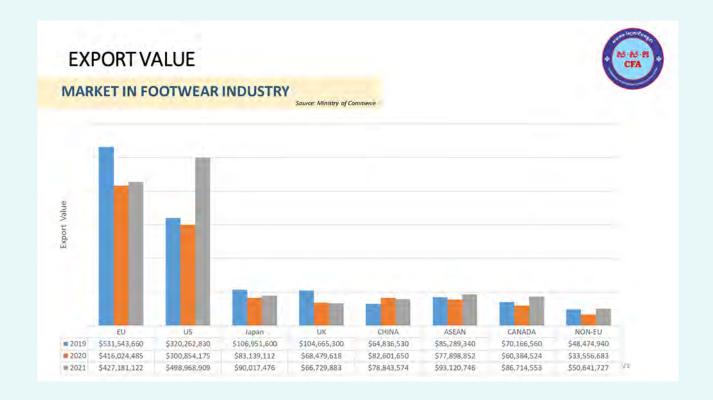
PRIORITY PERIOD

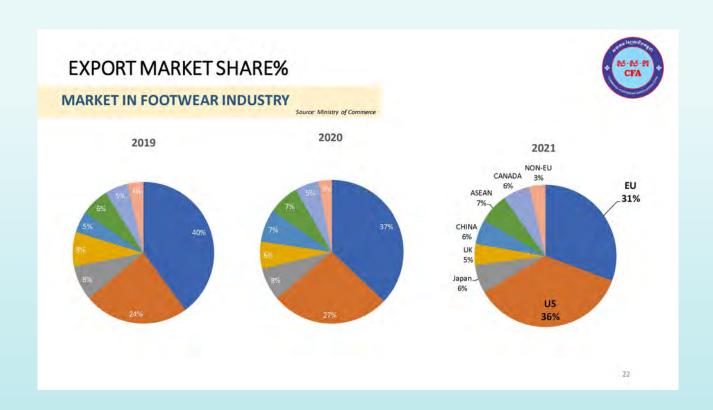
The priority period starts from the fiscal year that immediately follows the third year of the three-year period, and lasts from zero to three years, depending on the type of project and the amount of investment capital. The priority period is determined by a Royal Decree, which is issued by the government.

The normal corporate tax rate in Cambodia is 20 percent. QIPs that elect to receive an exemption on profit taxes enjoy a tax holiday for up to nine years.











MAJOR TRADE PREFERENCE IN CAMBODIA

- ASEAN 1999
- ASEAN + 1 FTAs (AANZFTA, AKFTA, AJCEP, AHKFTA, ACFTA, AIFTA)
- Cambodia China FTA (EFF 2022)
- Cambodia Korea FTA (EFF 2022)
- ASEAN-Canada FTA launched Negotiation
- Cambodia UAE CEPA launched Negotiation
- EU-Everything But Arms (EBA)
- UK-Everything But Arms (EBA)
- GSP: 32 Countries
- MFN: WTO since 2004
- Regional Comprehensive Economic Partnership, RCEP 2022 (10 ASEAN COUNTRIES+CHINA, JAPAN, AUSTRALIA, NEW, SOUTH KOREA)







ABOUTUS

BACKGROUND

Footwear industry have invested in Cambodia since 1990's.

In 2010's, there were much more footwear manufacturing investing in this attractive country with competitive labor cost as well as multiple trade preferential.

In 2018, there were 13 initial members proposing to set up a footwear association to bridge the connection between each investors and cooperate with government to enhance the competitiveness of Cambodia.





ABOUT US

TIMELINE

2018 *13 initial members

set up CFA

2019

*CFA Official launched in Cambodia

*Official members
Member of 25+associa
Confederation of
International
Footwear

Association (CIFA)

2020

*Committee of National Minimum Wage

*55+ official 62+associate members members 25+associate with members 160,000

2022

*57+official members 2+certified professional members 62+associate members with 160,000 active workers





ABOUTUS



OUR MISSION

- To contribute to a competitive investment and trade environment for Cambodia.
- To enhance our members' capacity & capability for their better business operation.
- To work with all stakeholders to continuously bring about a better business environment for our members to grow and develop.
- To provide our members with relevant updated information and regulations in a timely manner.
- To build professional management system and standard operating procedure (SOP) among our members.
- To better build a Cooperate Social Responsibility (CSR) & Sustainability mindset among our members.

77

WHAT WE DO



LEGAL REGULATION

We will update and translate the legal regulation





SEMINAR (SELECTED TOPIC)

Explanation from government officers regarding the law regulation





CONSULTATION

We provide consultation to CFA member question







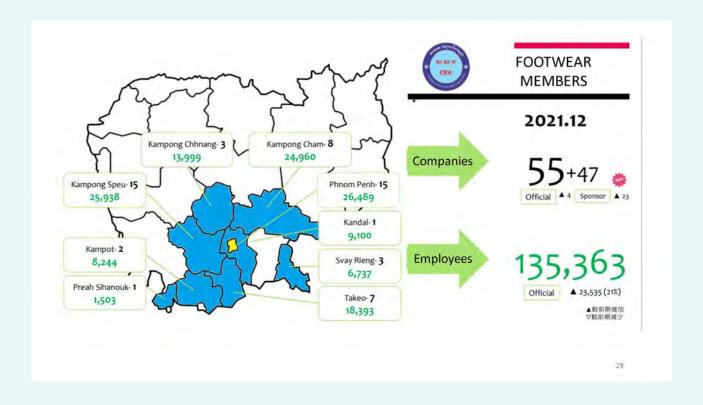
BUSINESS PROMOTING & NETWORKING

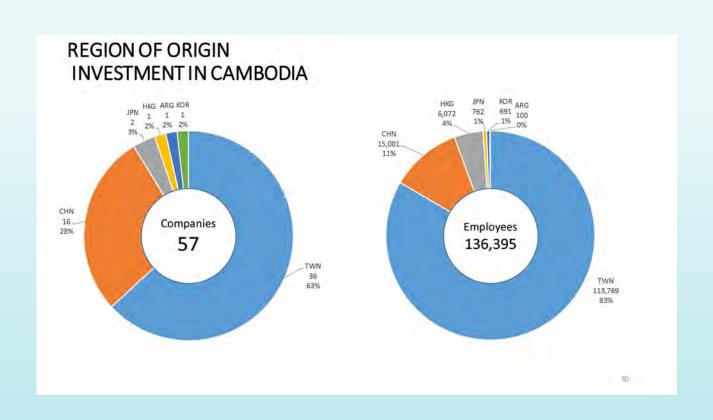
To enhance footwear industrials, we have partnered with private company to provide a better solution to member





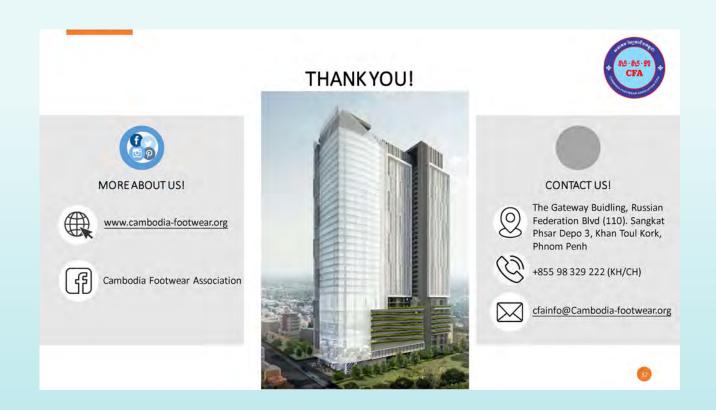














Country Report of Chinese Footwear Industry 2021 and 2022



China Leather Industry Association

- ♦1 Performance in 2021
- ♦2 Performance in 2022



◆1 Performance in 2021

✓ Key indicators in 2021

✓ Production: 13.5 billion pairs est.

Sales revenue (generated by 4,175 enterprise above designated size):

RMB 655.3 billion

✓ Exports: 8.73billion pairs, \$47.9 billion

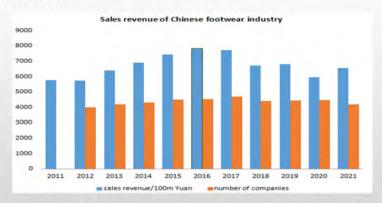
✓ **Imports:** 210 million pairs, \$6.1 billion

✓ Consumption: 4.1 billion pairs, RMB 500 billion est.

The industry has roughly recovered to the situation before the global pandemic.

◆1 Performance in 2021

> 1.1 Sales revenue



✓ Sales revenue of 4,175 enterprise above designated size, i.e., above 20m Yuan, reached 655.3 billion Yuan in 2021, up by 8.9% compared with 2020.

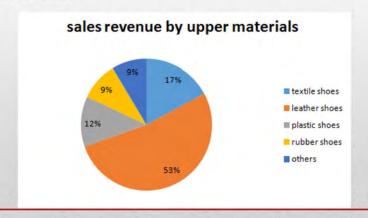
✓ The number of enterprise above designated size slightly declined in 2021.



◆1 Performance in 2021

▶1.1 Sales revenue

✓ Leather shoes accounts for more than half of the total revenue, followed by plastic, rubber, and textile shoes.

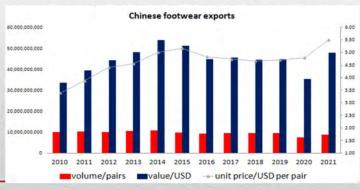


♦Performance in 2021

▶1.2 Export

✓ Exports totaled 8.73 billion pairs and USD 47.9 billion in 2021, increased by 18.1% and 35.3% year-on-year respectively.

✓ Considering the sharp decline in 2020, the two-year average growth rate in value was only 3.3%.

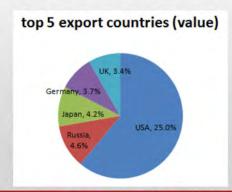


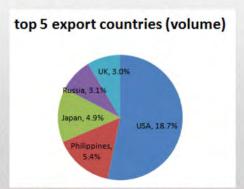


◆Performance in 2021

>1.2 Export

✓ The top three export destinations are US, Russia and Japan in terms of value. While the Philippines ranked 2^{nd} in terms of volume.



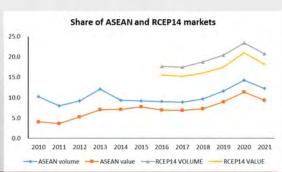


♦Performance in 2021

▶1.2 Export of footwear

Since 2009 the share of the three main destinations (US, EU and Japan) has been shrinking, while the ASEAN countries have been becoming more and more important.

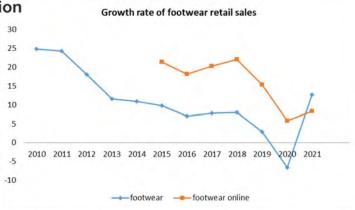






◆Performance in 2021

▶1.5 Consumption



- ➤ Growth rate of domestic retail sales for footwear increased by 12.7 percent over 2021, with the two-year rate for 220 and 2021 was only 1.2% according to NBSC.
- ➤Online sales still outperform the total retail sales in growth rate.

◆2 Performance in 2022

>Sharp contrast between export and import:

The exports increased by 12.4% in volume and 30.4% in value in Jan to Aug 2022, compared with the same period last year.

The imports decreased by 16.9% in volume and 7.5% in value from Jan to Aug 2022.

The domestic consumption was far below expectation, with the retail sales declined by 4.4% and online sales increased by 4% in the first 8 months.

| Jan to Aug growth rate | VOLUME | VALUE |
|------------------------|--------|-------|
| Exports | 12.4% | 30.4% |
| Imports | -16.9% | -7.5% |



◆2 Performance in 2022

Keywords: men's shoes online

In August, the online retail sales of men's shoes on 16 e-commerce platform including JD and Tmall reached 3.2 billion yuan, a year-on-year decrease of 1.21 percent according to OtoO.

| プラキ土 | 2022-00 | 2022-0 | O/JM. | . Topzu | 7 AX 196 | | | | |
|------|---------|--------|--------|---------|----------|------|-------------|--------------|--|
| | | | | | | 淘宝、苏 | 宁、 掌上生活、 | 日上мsн | |
| | 时间: | 2022-0 | 8~2022 | 2-08 | | | | | |

分类: 男鞋

| 排名 | 品牌名称 | 零售额(元) | 零售额占比 | 零售量(件) | 零售量占比 |
|----|------------------|-------------|-------|---------|-------|
| 1 | 回力/WARRIOR | 178149389.3 | 5.56% | 2443005 | 8.18% |
| 2 | 木林森/MULINSEN | 57141242.18 | 1.78% | 368316 | 1.23% |
| 3 | 爱步/ECCO | 53718825.85 | 1.68% | 56460 | 0.19% |
| 4 | 卡帝乐鳄鱼/CARTELO | 39400598.49 | 1.23% | 303197 | 1.02% |
| 5 | 花花公子/PLAYBOY | 36487570.88 | 1.14% | 217669 | 0.73% |
| 6 | 百丽/BELLE | 35353833.87 | 1.1% | 91745 | 0.31% |
| 7 | 吉普/JEEP | 34479990.71 | 1.08% | 115536 | 0.39% |
| 8 | 红蜻蜓/REDDRAGONFLY | 30091294.74 | 0.94% | 140182 | 0.47% |
| 9 | 意尔康/YEARCON | 29279214.3 | 0.91% | 192884 | 0.65% |
| 10 | 奥康/AOKANG | 26867783.56 | 0.84% | 113846 | 0.38% |
| 11 | 阿斯顿名爵/JAZZ | 24396698.6 | 0.76% | 33843 | 0.11% |
| 12 | 骆驼/CAMEL | 23840918.07 | 0.74% | 90277 | 0.3% |
| 13 | 足力健 | 22608220.04 | 0.71% | 145101 | 0.49% |
| 14 | SKECHERS | 20689066.17 | 0.65% | 67488 | 0.23% |
| 15 | 老人头/LAORENTOU | 19204660.65 | 0.6% | 97045 | 0.33% |
| 16 | 金利来/GOLDLION | 15929672.01 | 0.5% | 26161 | 0.09% |
| 17 | 黑觅 | 15497595.96 | 0.48% | 249485 | 0.84% |
| 18 | 沙驰/SATCHI | 15172468.64 | 0.47% | 23323 | 0.08% |
| 19 | 海瀾之家/HLA | 14543912.13 | 0.45% | 58065 | 0.19% |
| 20 | 帕尼霖 | 13871389.5 | 0.43% | 161933 | 0.54% |

◆2 Performance in 2022 女鞋 2022-08~2022-08天猫... Top20品牌交易规模

平台: 天猫、京东、抖音、快手

Keywords: women's shoes online

In August, the online retail sales of women's shoes on 16 e-commerce platform including JD and Tmall reached 6.8 billion yuan, a year-on-year increase of 2.35 percent according to OtoO.

| 平台:天猫、京东、抖音、 得物、考拉、丝芙兰、聚美 | | | | |
|------------------------------|------------|--------|---------|---|
| 时间: 2022-08~2022-08 | | | | |
| 分类: 女鞋 | | | | |
| | | | | |
| 品牌名称零 | 售額(元) | 零售额占比 | 零售量(件) | |
| 回力/WARRIOR | 225266751 | 3.27% | 2826939 | 7 |
| >+ ++ +P /p + = + + + | 40700400 2 | 4 720/ | | - |

| 排名 | 品牌名称 | 零售額(元) | 零售额占比 | 零售量(件) | 零售量占比 |
|----|------------------|-------------|-------|---------|-------|
| 1 | 回力/WARRIOR | 225266751 | 3.27% | 2826939 | 5.26% |
| 2 | 达芙妮/DAPHNE | 118789400.2 | 1.73% | 693751 | 1.29% |
| 3 | 首丽/BELLE | 98873167.3 | 1.44% | 294968 | 0.55% |
| 4 | 匡威/CONVERSE | 84924900.04 | 1.23% | 332720 | 0.62% |
| 5 | 卓诗尼/JOSINY | 51807338.82 | 0.75% | 327335 | 0.61% |
| 6 | 思加图/STACCATO | 49417758.9 | 0.72% | 101926 | 0.19% |
| 7 | 他她/TATA | 47891133.03 | 0.7% | 136808 | 0.25% |
| 8 | SKECHERS | 40275455.93 | 0.58% | 134834 | 0.25% |
| 9 | 美职棒/MLB | 35166142.38 | 0.51% | 103238 | 0.19% |
| 10 | 阿迪达斯/ADIDAS | 34035250.68 | 0.49% | 37003 | 0.07% |
| 11 | 百思图/BASTO | 31707049.61 | 0.46% | 88613 | 0.17% |
| 12 | 爱步/ECCO | 30398859.57 | 0.44% | 32150 | 0.06% |
| 13 | 红蜻蜓/REDDRAGONFLY | 30374909.54 | 0.44% | 137223 | 0.26% |
| 14 | 耐克/NIKE | 28659682.73 | 0.42% | 83216 | 0.16% |
| 15 | 意尔康/YEARCON | 27902377.79 | 0.41% | 220027 | 0.41% |
| 16 | 热风/HOTWIND | 27834875.94 | 0.4% | 210856 | 0.39% |
| 17 | JIMMY CHOO | 26600115.01 | 0.39% | 9871 | 0.02% |
| 18 | 天美意/TEENMIX | 24610846.62 | 0.36% | 62645 | 0.12% |
| 19 | CHRISTINE SHEII | 23685306.14 | 0.34% | 102225 | 0.19% |
| 20 | 奥古狮登/AGSDON | 23485407.56 | 0.34% | 212608 | 0.4% |



WeChat of CLIA



Thank You!

The 39TH International Footwear Conference 第 39 屆 國 際 鞋 業 會 議

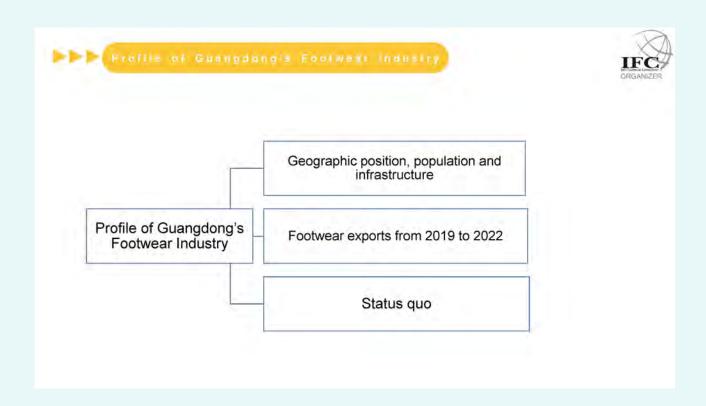


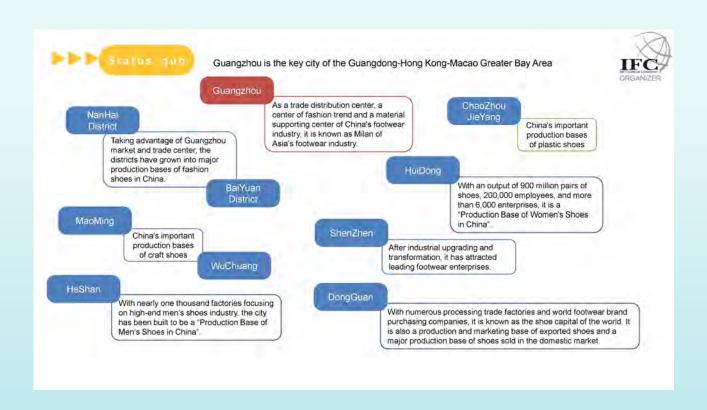




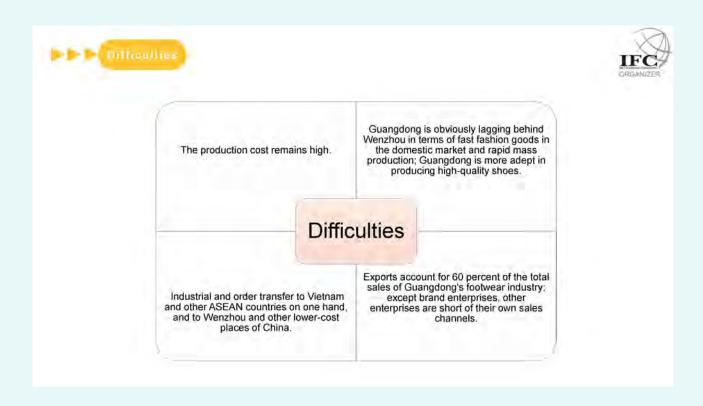






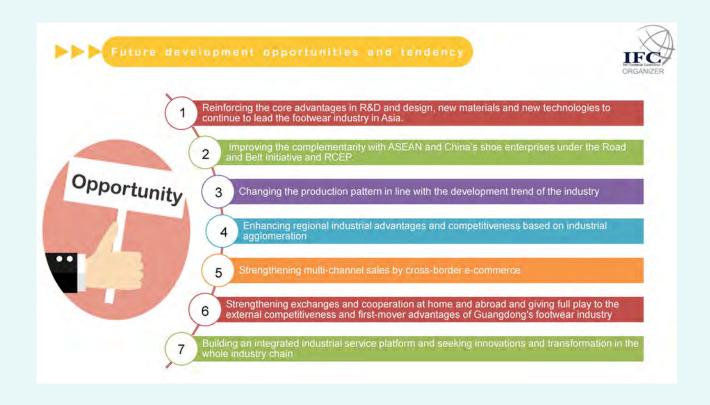






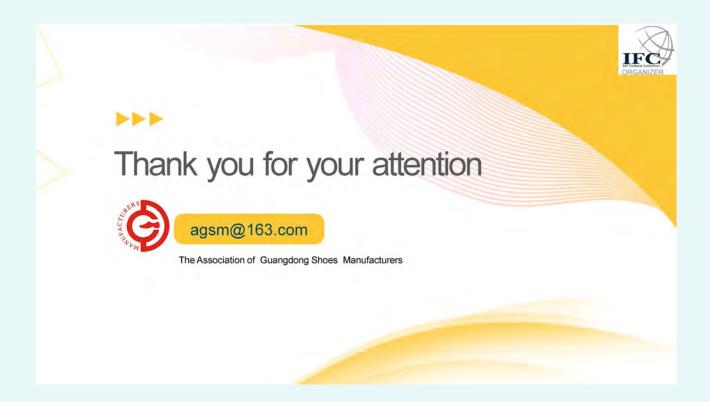






The Situation of Cross border E-commerce Import & Export from 2019 to 2021 Amount (100 million yuan) Year-on-year(%) Proportion of export & Year Imports & Imports & import **Exports** Imports **Exports Exports Imports Exports** 2019 12903 7981 4922 22.2 30.5 10.8 1.6 2020 16220 10850 5370 25.7 2.0 39.2 9.1 2021 19237 13918 5319 18.6 28.3 -0.9 2.6





The 39TH International Footwear Conference 第 39 屆 國 際 鞋 業 會 議







The 39th International Footwear Conference

Report of Hong Kong Footwear Industry



承先啟後 共創未來

Exports

Hong Kong's total footwear exports rose by 14% in the first eight months of 2021. Re-exports, which accounted for the bulk of total footwear exports in the same period, exhibited the same trend. Domestic exports, coming off a low base, increased by 172%. (Source: Hong Kong Trade Statistics, Census and

Statistics Department)

| (HK\$ Million) | 2019 | | 2020 | | Jan-Sep 2 | 021 |
|------------------|--------|----------|--------|----------|-----------|----------|
| | Value | Growth % | Value | Growth % | Value | Growth % |
| Domestic Exports | 3 | +294 | 4 | +14 | 6 | +149 |
| Re-exports | 23,217 | +5 | 16,475 | -29 | 13,813 | +13 |
| of China origin | 16,913 | -3 | 10,350 | -39 | 8,093 | +6 |
| Total Exports | 23,220 | +5 | 16,479 | -29 | 13,819 | +13 |





Products

Hong Kong produces a wide range of footwear suitable for indoor and outdoor activities. The industry is particularly strong in the manufacture of women's shoes, including boots and mules made from real or synthetic leather. Some companies specialise in men's casual footwear, such as boat shoes, moccasins, loafers and canvas shoes, and others in sports varieties. More companies are now paying attention to children's shoes.





香港鞋業商會 HONG KONG FOOTWEAR ASSOCIATION

承先啟後 共創未來

Branding

Hong Kong footwear companies such as *Belle International* and *le saunda* are enthusiastic about brand development. They sell their branded products through their own retail outlets and via franchising or joint ventures with local partners in some markets, including mainland China. Some footwear companies also explore niche markets with their own brand products – for instance, *Dr. Kong Footcare, Kong Cheong Shoes Group* and *Pen-Walking* in health footwear.









香港鞋業商會 HONG KONG FOOTWEAR ASSOCIATION le saunda

Major Market

Mainland China continues to be the largest export destination for Hong Kong footwear with a market share of 30% in January-September 2021. The US, which accounted for 21% of total footwear exports, saw a 32% rise during the same period, while the EU27, Macao and South Korea registered growth of 19-65%. Finished footwear, the major category of exports, climbed by 17%, while accessories and parts dropped by 3%.(Source: Hong Kong Trade Statistics, Census and Statistics Department)

| By Major Market | 2019 | | 2020 | | Jan-Sep 2 | 021 |
|-----------------|---------|----------|---------|----------|-----------|----------|
| | Share % | Growth % | Share % | Growth % | Share % | Growth % |
| Mainland China | 24.3 | +27 | 32.5 | -5 | 30.0 | +3 |
| US | 23.6 | -10 | 17.5 | -47 | 21,1 | +32 |
| EU (27) | 11.7 | +7 | 11.3 | -32 | 11.4 | +21 |
| Germany | 32 | +14 | 3.1 | -33 | 2.7 | +2 |
| italy | 20 | +7 | 2.5 | -11 | 3.0 | +37 |
| Netherlands | 3.1 | +1. | 2.4 | -45 | 2.3 | +19 |
| ASEAN | 7.6 | +6 | 9,1 | -15 | 7.8 | 4 |
| Vietnam | 2.2 | -7 | 2.8 | -8 | 3.3 | +38 |
| Macao | 7.7 | +29 | 6.5 | -40 | 8.8 | +65 |
| Japan | 3.6 | -17 | 3,6 | -28 | 2.9 | -12 |
| South Korea | 3.0 | +51 | 3.4 | -19 | 3.6 | +19 |



香港鞋業商會 HONG KONG FOOTWEAR ASSOCIATION

承先啟後 共創未來

Employment

Hong Kong's footwear manufacturing industry had a total employment of just 20 workers as of 2020. The majority of footwear manufacturers have set up offshore-production facilities in mainland China or ASEAN to reduce operating costs and stay competitive, leaving only limited capacity in Hong Kong to meet small and quick orders. Some manufacturers, after the relocation of production facilities offshore, are classified instead as import-export establishments. As of 2020, there were 1,140 import or export establishments with 4,480 workers.

| | Manufacturing | Import and Export |
|-----------------------|---------------|-------------------|
| No. of Establishments | * (2020) | 1,140 (2020) |
| Employment | 20 (2020) | 4,480 (2020) |





Sales Channels



More and more Hong Kong footwear companies engage in ODM projects. Many have their own research and development and quality control specialists to improve the quality of their products. Some Hong Kong footwear companies, such as Belle International (carrying brands including Joy & Peace, Jipi Japa, Mirabell and STACCATO) and le saunda Group (le saunda, le saunda MEN, LINEA ROSA, PITTI DONNA and CNE) have also built up their brands within the online and offline retail networks of Hong Kong, Macao and mainland China. While some footwear exporters prefer dealing with distributors, others are selling to mass merchandisers and e-commerce platforms, such as Tmall, Walmart, Target and Costco.





Industry Trends



Fuelled by the rising green consciousness, environmental, social and governance (ESG) will continue to be a buzzword going forward. Increasingly, ethical sourcing is important to international footwear companies. In response to the popular demand for respecting human rights in workplaces, many leading companies have prohibited discrimination, harassment and child labour, while introducing measures to monitor and enhance the working conditions in factories of their own and their suppliers. To stay future-proof, Hong Kong-headquartered shoemakers such as *Kingmaker Footwear Holdings Limited* have been conducting ESG reports.





承先啟後 共創未來

General Trade Measures Affecting Exports of Footwear

Overall, trade measures for footwear are quite prohibitive. While footwear exports to the US are subject to tariff duties of 0-48%, the EU's import tariffs are about 3-17%. Japan applies the tariff quota system with duty ranging from 3.4-30%. Tariff rates on leather footwear are broadly classified by shape, materials of soles and uppers, and country of origin.

| Tariff Rates of Footwear in Major Countries | | | | | | | |
|---|-------|---------|--|--|--|--|--|
| US | EU | Japan | | | | | |
| 0-48% | 3-17% | 3.4-30% | | | | | |
| Source: World Trade Organization | | | | | | | |





Product Trends



- Eco-friendly materials: Shoes made of recycled, upcycled and natural
 materials as well as animal-free substances are increasingly popular, while
 some infant shoes brands are promoting chrome-free leather shoes to reduce
 the risk of causing cellular damage.
- Healthy footwear: Against a background of rising health consciousness, health
 and comfort footwear products such as reflexology massage sandals and
 foot-care products like pads, toe spreaders and separators are gaining in
 popularity. For instance, the local brand *Dr. Kong* is particularly renowned for
 its healthy footwear products and has been expanding its store-based retail
 and e-commerce business in mainland China since 2007.



承先啟後 共創未來

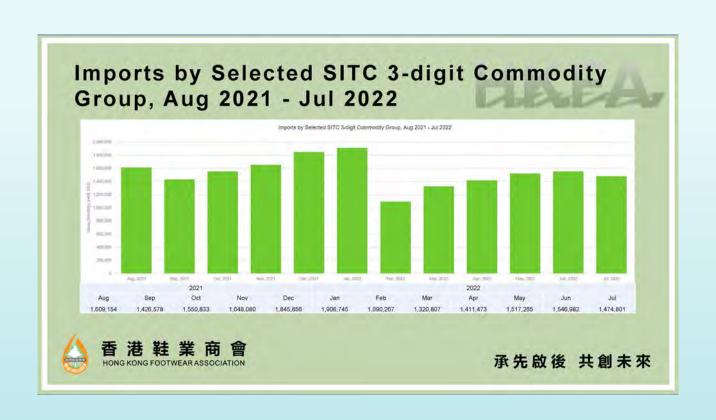
Product Trends



Sports and fitness footwear: An increasing appetite for outdoor activities and fitness among city-based millennials is driving the spending of athleisure wear. This is particularly the case for the US, the world's largest footwear importer, where athleisure and comfort footwear is increasingly acceptable for the workplace. Sports footwear is also the fastest-growing product segment in mainland China due to the urban fitness boom. The growing popularity of hiking as an escape from pandemic containment measures has created a surge in demand for such shoes in Hong Kong.















Indian Footwear Industry - Fact Sheet | Year : 2021





Exports

Domestic Turnover

Imports

Production

Consumption

Employment

Share in Global Market

USD 2.08 bn (Global Ranking: 11)

USD 10 billion*

USD 0.50 billion

2600 mn pairs * (Global Ranking - 2)

2560 mn pairs * (Global Ranking - 2)

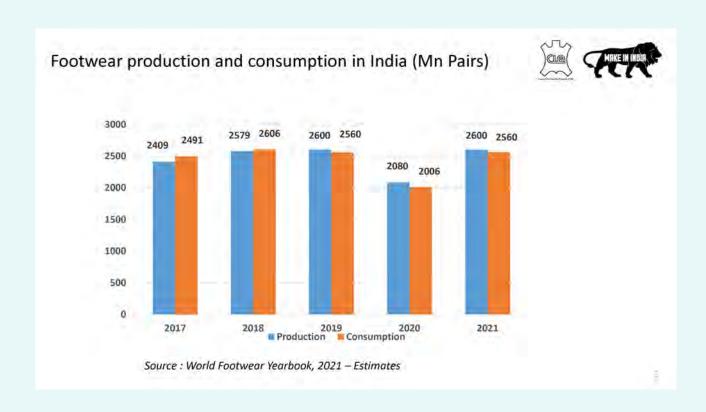
2 million

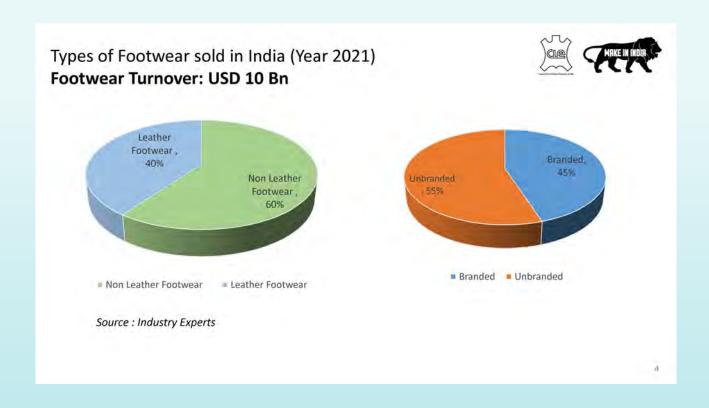
1.52% (2021)

(Global Imports during 2021: USD 136.90 bn)

Source : Intl. Trade Centre, Geneva * Estimated





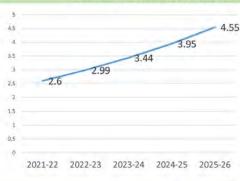


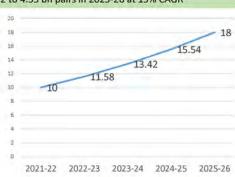
Indian Footwear Industry Growth Potential





Turnover to increase from USD 10 bn in 2021-22 to USD 18 bn by 2025-26 (15.83% CAGR). Production to increase from 2.6 bn pairs in 2021-22 to 4.55 bn pairs in 2025-26 at 15% CAGR





Key Growth Drivers - Domestic and Exports

- Trade Agreements with UAE and Australia and also proposed FTAs with UK & EU to propel growth.
- Very strong export growth to the USA market.
- Increasing disposable income and higher spending on lifestyle products in India
- Increased reach of mid and economy brands to Tier II/III Indian cities

Q



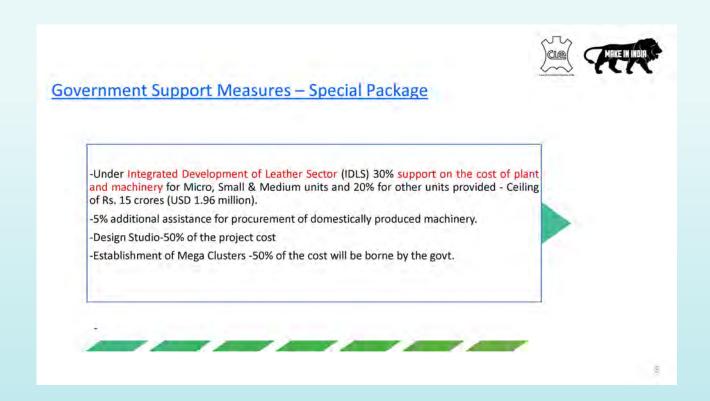


Government Of India

Various Support Initiatives - For Manufacturing









Fiscal Support Measures for both Exporters and Domestic Manufacturers





Low GST Rates: Low GST rates for leather industry items – for finished leather5%, for certain leather chemicals, leather goods, leather garments and saddlery items - 18%, for CETPs - 12%, for footwear with MRP up to Rs.1000/- 12%.

Corporate Tax: Corporate Tax rate from 30% to 22% for companies from financial year 2019-20. Only 15% Corporate Tax for new companies w.e.f.1.10.2019

9

Support Measures / Duty Reimbursement for Exporters





Interest Reduction : 3% reduction in interest rates on pre-shipment and post-shipment on rupee export credit during Oct. 21 – March 2024.

Remission of Duties and Taxes on Exported Products (RODTEP): Reimbursement of Excise/ VAT on fuel used in inputs/raw materials, other unrefunded taxes) is 1%/1.3% for footwear. Domestic Tax (GST) for export products is reimbursed to exporters. Also, Customs duty paid is reimbursed in the form of Drawback.

Duty Free Import of notified inputs under Advance Authorisation Scheme, subject to export obligation.

Duty free import of machinery under EPCG Scheme subject to export obligation of 6 times of duty saved in 6 years.

10



Import Duty Exemption Scheme for Footwear Exporters



- Import duty exempted on Tags, labels, stickers, belts, buttons, hangers or printed bags (whether made of polythene, polypropylene, PVC, high molecular or high-density polyethylene), imported by bona-fide exporters
- ☐ Import duty exemption on following notified inputs allowed
- (a) buckles, "D" Rings and "O" Rings, eyelets, hooks and eyes, rivets, studs, decorative fittings and metal trimmings
- (b) buttons and snap fasteners, zip fasteners
- (c) locks including magnetic locks
- (d) metal handles, handle fittings, handle holder, metal frames, dog hooks, logos of all types, ring binders, key hooks, key rings, key holders, push clip,
- chains, pullers, parts of pullers, hinges and magnetic snaps
- (e) loop rivets and loop oval
- (f) packaging boxes
- (g) saddle tree
- (h) fittings, snaps of metals or alloys
- (i) metal fittings, embellishments, webbing of any material for making harness and saddler items
- (j) stirrup of any material and stirrup bars used for making saddle tree-
- (k) artificial fur and alarm tag
- (I) magnets for use in leather goods
- (m) micropak labels
- (n) wet blue chrome tanned leather
- Above is subject to conditions of Customs (Import of Goods at Concessional Rate of Duty) Rules, 2017 and that the items manufactured using the imported goods are exported by the importer within six months of the date of the import of the said imported goods

33

Support Measures for FDI





Repatriation of profits : 100% repatriation of profit and dividends allowed if investment made in convertible foreign currency

Foreign Direct Investment (FDI): 100% Foreign Direct Investment (FDI) permitted through the automatic route (no prior approval required from Government).

FDI in retailing: 100% FDI is permitted in single brand retailing-under automatic route if FDI up to 49% and under Government approval route, if FDI is more than 49%. FDI up to 51% is allowed under Government approval route in multi-brand retail trading sector, subject to specified conditions and approval of the State Government.

FDI in Duty-Free Shops: 100% FDI under automatic route allowed for the establishment of duty-free shops in customs bonded areas at International sea ports/airports/Land Customs Stations.

12



Ease of Doing Business Measures





e-BRC (Bank Realisation Certificate) introduced (realization of export proceeds directly transferred from bank to DGFT service)

24 x 7 Customs Clearance facility introduced. E – sealing of export containers in place.

Authorised Economic Operator Programme (AEO) of Customs facilitates faster clearance for import and export consignments

Single Window programme implemented for imports and exports

Mandatory documents for export & import brought down to 3
(Bill of Lading/Airway Bill, Invoice-cum-Packing List, Shipping Bill/Bill of Entry)

93

Areas of collaboration





Establishment of Strong supply chain – Development of Footwear & components sector (FDIs/ JVs/ Capacity modernization and expansion of existing units)

Development of Raw Materials sector (like PU etc.,)

Development of Machinery and Chemicals sector

Focus on Research & Development

Skill Development at all levels

3,4





THANK YOU!



15





INDONESIA COUNTRY REPORT 2022

INDONESIA FOOTWEAR ASSOCIATION (APRISINDO)

COUNTRY FACTS OVERVIEW

INDONESIAN FOOTWEAR EXPORT – IMPORT PERFORMANCE

INDONESIAN DOMESTIC RETAIL MARKET

INDONESIAN FOOTWEAR INDUSTRY CHALLENGES AND OPPORTUNITIES

KEY TAKE A WAY

CONTENTS



COUNTRY FACTS OVERVIEW

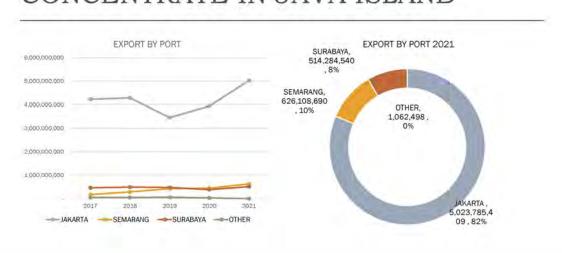
| Economic Indicators | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|--|-------|---------|---------|---------|-------|-------|-------|
| GDP per capita (USD) | 3,374 | 3.605,1 | 3,876.8 | 3 3.927 | 4.135 | 3.869 | 4.291 |
| GDP (USD bln) | 862 | 917 | 1.015 | 1.022,5 | 1.119 | 1.058 | 1.190 |
| Economic Growth (GDP, annual variation in %) | 4.8 | 5.02 | 5.07 | 5.17 | 5.02 | 2,07 | 3,86 |
| Unemployment Rate % | 6.2 | 5.61 | 5.33 | 5.13 | 5,28 | 7,07 | 6,49 |
| Population (million) | 254 | 256 | 257 | 264 | 266 | 270 | 275 |

INDONESIA FOOTWEAR KEY PERFORMANCE INDICATORS

| INDICATORS | 2018 | 2019 | 2020 | 2021 |
|---|---------------|---------------|-------------|-------------|
| Number of firms | 496 | 462 | 482 | 549 |
| Number of workers | 926,292 | 799.390 | 551.901 | 706.921 |
| Production Capacity (pair) | 1,470,986,487 | 1.377.632.283 | 752.000.000 | 862.200.000 |
| Consumtion (pair) | 670,045,956 | 667.250.000 | 280.200.000 | 388.887.130 |
| Consumtion (pair) Per Capita | 2.5 | 2,5 | 1,03 | 1,3 |
| Imports (pair) | 53,252.750 | 159.433,780 | 102.442.016 | 143,187,130 |
| Exports (pair) | 336,045,796 | 429.400.000 | 471.800.000 | 616,500,000 |
| mports (value) + Including component (US \$ 000) | 746,461 | 873.089 | 617.270 | 732.235 |
| Imports (value) - Exclude component (US \$ 000) | 479,082 | 569.406 | 365.864 | 377.941 |
| Exports (value) + Including component (US \$ 000) | 5,113,294 | 4.409.287 | 4.804.496 | 6.165.241 |
| Exports (value) - Exclude component (US \$ 000) | 4,987,279 | 4.294.106 | 4.718.926 | 6.083.816 |
| | | | | |



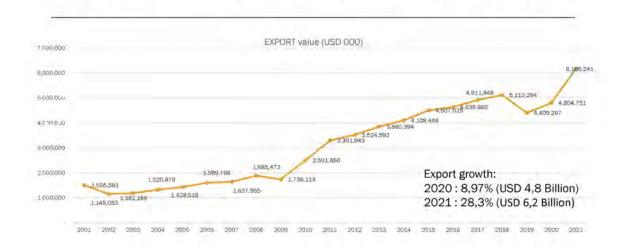
INDONESIA'S FOOTWEAR INDUSTRY CONCENTRATE IN JAVA ISLAND

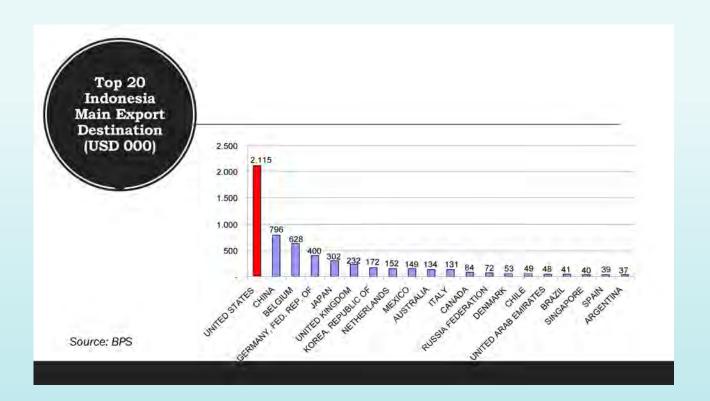


EXPORT – IMPORT PERFORMANCE

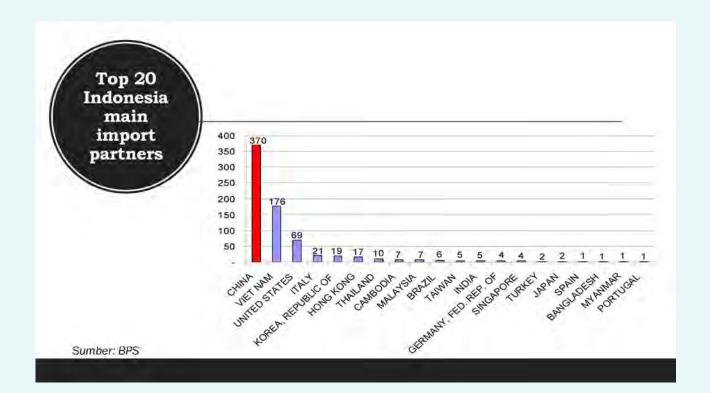


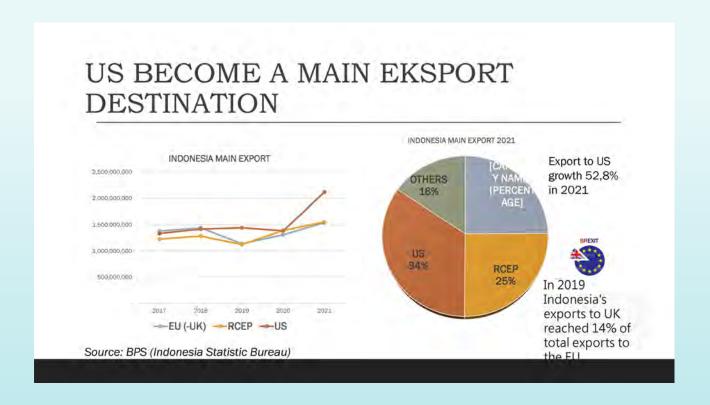
INDONESIA EXPORT 2001-2021













DOMESTIC MARKET

TOP BRAND FOR GEN Z (MILENIAL) 2022

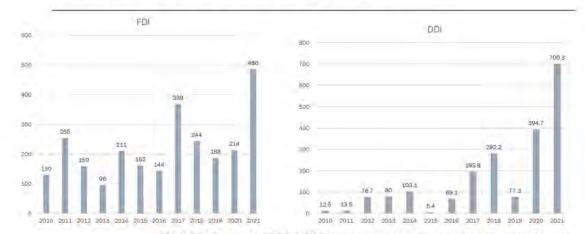
| SCHOOL SHOES | | | 9 | SANDALS | | SPORT SHOES | | | |
|--------------------|----------|-----|---------|----------|-----|-------------|----------|-----|--|
| BRAND | TBI 2022 | gı | BRAND | TBI 2022 | | BRAND | TBI 2022 | | |
| Converse/ All Star | 50.0% | TOP | Eiger | 32.1% | ТОР | Adidas | 33,6% | TOP | |
| Airwalk | 12.0% | TOP | Carvil | 20.6% | ТОР | Nike | 19.9% | TOP | |
| NB | 6.6% | | Ardiles | 10.4% | TOP | Ardiles | 11.1% | TOP | |
| North Star | 6.4% | | Bata | 7.7% | | Reebok | 9.1% | | |
| Adidas | 1.8% | | Nike | 5.8% | | Diadora | 7.3% | | |



TOP BRAND (GENERAL) 2022

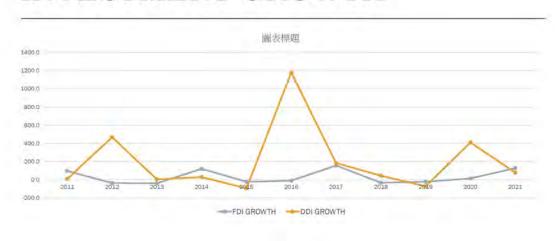
| CASUAL SHOES | | | SA | ANDALS | | MEN'S F | WOMEN'S FOR WORK | | | | |
|--------------|------------|-----|--------------|----------|-----|-----------------|------------------|-----|---------------|----------|-------|
| BRAND | TBI 2022 | | BRAND | TBI 2022 | | BRAND | TBI 2022 | 2 | BRAND | ТВІ | 2022 |
| Bata | 14.2% | TOP | Carvil | 25.1% | ТОР | Bata | 17.2% | TOP | Fladeo | 15.6 | % TO |
| Carvil | 11,4% | TOP | Bata | 10.8% | TOP | Buccheri | 13.0% | тор | Bata | 11.8 | % TOP |
| Ardiles | 7.0% | | Kickers | 10.1% | TOP | Yongki Komaladi | 9.1% | | Buccheri | 10.9 | % TOP |
| Fladeo | 4.9% | | Neckermann | 9.9% | | Fladeo | 4.3% | | Yongki Komala | rdi 7.29 | 6 |
| Nike | 4.7% | | Eiger | 9.7% | | Kickers | 1.6% | | Nevada | 5.09 | 6 |
| - 1 | FLIP FLOPS | | RUBE | R SANDAL | S | 8 | BOOTS | | 3 | SPORTS | |
| RAND | TBI 2022 | | BRAND | TBI 2022 | | BRAND | TBI 2022 | | BRAND | TBI 2022 | |
| wallow | 86.2% | TOP | Uniqlo | 41.7% | TOP | Crocodile | 38.1% | ТОР | Adidas | 34.8% | ТОР |
| huanglu | 3.6% | | Porto | 41.3% | TOP | Gino Mariani | 29.9% | TOP | Nike | 21.6% | TOP |
| Melly | 2.2% | | Xiaomi Mijia | 15.5% | TOP | Jim Joker | 16.3% | TOP | Ardiles | 8,7% | |
| Okina | 1.9% | | | | | Playboy | 15.6% | | Diadora | 6.8% | |
| Chogi | 1,0% | | | | | | | | Reebok | 4,4% | |

LEATHER GOODS & FOOTWEAR INDUSTRY INVESTMENT









INDONESIAN FOOTWEAR INDUSTRY CHALLENGES AND OPPORTUNITIES



CHALLENGE

HUMAN RESOURCES

 Generally, high school graduates or equivalent still do not have the appropriate skills. So it still has to be trained again by the company. As a result, it takes time and additional costs to train new workers

MATERIAL

 Mostly material and component for footwear in Indonesia must be imported. This make lead time become more difficult.

LOGISTIC

The pandemic has resulted in a shortage of vessel and containers, thus
pushing prices to be more expensive than other competing countries

BUSINESS LICENSING

 Business licensing still become a big problem in Indonesia, factory should be ferry close with association to deal with the government regulation.

OPPORTUNITY (INDONESIA GOV POLICY)

TAX ALLOWANCE

or industry expansion. A tax incentive against income tax withholding can reach 30%.

IMPORT INCENTIVE (KITE/KB)

Exemption of import duty and value edit tax on imports of raw materials for export industry

3 IN 1 TRAINING

link and match between training institutions and industrial companies to produce competent and jobready training graduates.

IOMKI

Special Permit to operate the factory in Pandemic / Lockdown era

DEDUCTABLE TAX INCENTIVES)

tax incentive given by the government to industries involved in vocational educatior & research and development programs

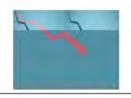
DEREGULATION OF MINIMUM WAGES

Setting the minimum wage increase based on economic growth "or" inflation











CONCLUSIONS & RECOMMENDATIONS ECONOMIC CONDITION

INDONESIA OPEN FOR INVESTMENT

INDONESIA HAVE COMPARATIVE ADVANTAGE

INDONESIA HAVE A STABLE POLITIC AND

THE INDONESIAN GOVERNMENT IS STILL TRYING TO IMPROVE ITS COMPETITIVENESS





APENDIX

EXPORT VALUE USD 000 (2012-2022)

| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| JAN | 310,307 | 344,137 | 336,163 | 395,328 | 395.861 | 407.510 | 462.951 | 469.362 | 424.220 | 490.110 | 659.426 |
| FEB | 257.066 | 277.323 | 300.682 | 331.327 | 353.198 | 368.447 | 378.741 | 331.042 | 441.895 | 480.838 | 623.298 |
| MRT | 243.797 | 275.765 | 276.978 | 342.484 | 354.772 | 416.983 | 435.619 | 346.037 | 464.985 | 506.607 | 715.749 |
| APRL | 284,186 | 327.228 | 358.715 | 416.388 | 419.545 | 400.786 | 448.368 | 377.635 | 433.180 | 520.441 | 722.346 |
| MAY | 353,743 | 394.312 | 389.850 | 426.893 | 435.771 | 465.134 | 477.785 | 407.782 | 340.853 | 369.129 | 523.362 |
| JUNE | 329,586 | 335,686 | 387,737 | 420.122 | 441.378 | 329.638 | 298.056 | 262.701 | 385.023 | 490.714 | 712.441 |
| JULY | 311,984 | 363.170 | 309.563 | 290.407 | 269.797 | 405.682 | 440.588 | 394.997 | 371.926 | 508.470 | 658.268 |
| AUG | 232.828 | 231.801 | 304.473 | 353.414 | 367.264 | 419.116 | 424.602 | 347.406 | 308.693 | 525.574 | |
| SEP | 238.957 | 286.974 | 301.661 | 319.134 | 341.282 | 360.121 | 366.461 | 313.251 | 326.148 | 496.725 | |
| OCT | 283.072 | 322.494 | 363.670 | 367.945 | 394.685 | 433.209 | 470.764 | 410.590 | 404.815 | 517.521 | |
| NOV | 345.982 | 338.370 | 378.789 | 433.180 | 441.997 | 482.216 | 481.772 | 381.576 | 440.813 | 627.914 | |
| DEC | 333.084 | 363.133 | 400.168 | 410.402 | 424.308 | 421.186 | 427.586 | 366.906 | 461.941 | 631.196 | |
| | 3,524.592 | 3,860.394 | 4.108.448 | 4.507.025 | 4.639.859 | 4.910,028 | 5.113,294 | 4.409.285 | 4.804.492 | 6.165.239 | 4.614.890 |
| | | | | | | | | | | | |



IMPORT VALUE 2012-2022

| | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |
|-------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| JAN | 36.373.052 | 33.063.054 | 37.279.799 | 34.693.495 | 37.108.016 | 53.437.723 | 70.930.920 | 84.309.139 | 95.010.775 | 60.546.937 | 89.037.522 |
| FEB | 26.473,728 | 32,341.681 | 29.353,253 | 41.667.231 | 35,906.372 | 34,333,184 | 63.097 645 | 62,729,034 | 45.589,050 | 56.266.244 | 67.846.320 |
| MRT | 34.881.447 | 31,388,144 | 33 285 969 | 33,686,357 | 38.721.857 | 51,917.386 | 45,845.660 | 66.660.671 | 75.962.317 | 56.933.542 | 83,707.117 |
| APRL | 33.859.914 | 35.390.747 | 44.106 399 | 36.320,979 | 40.909.908 | 53 201 264 | 61.618.727 | 85.681.679 | 56.867 765 | 64.517.738 | 74.688.038 |
| MAY | 39.226.969 | 47.885.281 | 37.970.049 | 38.942.250 | 44.716.056 | 58 168 918 | 73.429.632 | 73.237.802 | 20.430.845 | 46.186 707 | 75.041.842 |
| JUNE | 38.499.978 | 41 728 294 | 36.622.961 | 38.799.162 | 40.358.046 | 31 273.494 | 36 110 159 | 53.680.032 | 39.284.279 | 65 229.422 | 86.690.650 |
| JULY | 34.536.633 | 40.202.887 | 25.135.351 | 30.249.992 | 30.067.662 | 50.494.005 | 71 187 663 | 80.114.198 | 39.655.244 | 50.169.549 | 96.591.345 |
| AUGUS | 21.038.719 | 25,444.748 | 28.996,908 | 36.569.731 | 42.907.981 | 53.843.911 | 64,264,388 | 70,416.166 | 45.938,758 | 49.230.017 | |
| SEPT | 29 957 538 | 40.468.830 | 35.290 745 | 33,187,609 | 46,409.946 | 52 961 875 | 59.704.019 | 69.457.400 | 47 332 856 | 61 954 293 | |
| OCT | 32.560.807 | 39.590.516 | 34 199 878 | 30.398.634 | 39.763.832 | 60.917 208 | 70 140 832 | 73.441.356 | 36.316.971 | 53.933.932 | |
| NOV | 30.256.406 | 36.710.374 | 32.866 443 | 33.019.758 | 46.767.528 | 57 903.007 | 68.914.962 | 75,900.120 | 51.882.710 | 73.149.548 | |
| DEC | 29,351,017 | 30,695,572 | 33,389,884 | 30,877,050 | 45.816.965 | 54.607.669 | 61 216 221 | 77,461,689 | 62.998,200 | 94.116.856 | |
| TOTAL | 387,016,208 | 434.910.128 | 408,497 639 | 418.412.248 | 489.454.169 | 613 059 644 | 746.460.828 | 873,089,286 | 617.269.770 | 732.234.785 | 573,602,834 |



39th IFC / Hong Kong

Korea Footwear Industry Report



KFIA Korean Footwear Industries Association

Introduce

In the Korean footwear industry, overseas production continues to increase rather than domestic production. Moreover, the amount of imports rather than exports continues to increase. This is because the environment in which the domestic shoe manufacturing industry can increase added value is not good.

Nevertheless, the Korean footwear industry is making great efforts to preserve the values of its long tradition. Because there are still many people who have expertise and passion for footwear.

They continue to analyze paradigm shifts and strive to find new production items that can be applied to Korea.

A smart factory is an example. The artificial intelligence system will provide an opportunity to increase the competitiveness of the domestic footwear industry. Another important issue we are facing is the development of eco-friendly materials. It can give hope for the future.

The footwear trend in Korea is a period of transition to fashion. The reason is that the current younger generation considers shoes as an important fashion item.

The young generation in Korea has a very different perception of footwear. They are the core of the change that makes shoes into their own unique fashion items. This influence continues to increase interest in custom shoes in Korea.

Most of Korea's domestic footwear industry does not have a mass production system.

However, they know how to overcome it. This is because the Korean footwear industry, which has a long tradition, has infrastructure and great potential.



1 Korea Footwear Industry

Manufacturing Statistics

< Based on Statistics : Company of 10 more work>

| Classification | 2015 | 2016 | 2017 | 2018 | 2019 | Average |
|----------------|--------|--------|--------|--------|-------|---------|
| Company | 486 | 493 | 467 | 443 | 386 | 455 |
| Workers | 11,691 | 11,538 | 10,878 | 10,157 | 8,868 | 10,626 |

Footwear-related companies

< Based on Statistics : Company of 10 more work>

| Classification | 2015 | 2016 | 2017 | 2018 | 2019 |
|-----------------------|--------|--------|--------|--------|--------|
| Mnnufacture company | 468 | 486 | 467 | 443 | 386 |
| wholesale & Retail | 13,643 | 13,643 | 13,421 | 13,502 | 13,665 |
| Total | 14,129 | 14,129 | 13,888 | 13,945 | 14,051 |

2₋₁ Korea Footwear Export & Import

Item Classification

<Unit:USD

| HSCODE | 2017 | | 2018 | | 2019 | | 2020 | | 2021 | |
|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| | Exports | Imports |
| HSK6401 | 2 | 23 | 2 | 27 | 1 | 22 | 1 | 22 | 1 | 30 |
| HSK6402 | 29 | 648 | 50 | 767 | 37 | 817 | 41 | 716 | 52 | 788 |
| HSK6403 | 74 | 974 | 89 | 1,089 | 97 | 1,156 | 75 | 1,109 | 71 | 1,276 |
| HSK6404 | 63 | 900 | 85 | 1,058 | 107 | 1,050 | 102 | 1,050 | 109 | 1,102 |
| HSK6405 | 16 | 20 | 13 | 29 | 13 | 27 | 18 | 28 | 17 | 50 |
| HSK6406 | 298 | 226 | 268 | 224 | 227 | 190 | 168 | 150 | 184 | 171 |
| Total | 484 | 2,794 | 507 | 3,194 | 484 | 3,265 | 408 | 3,076 | 437 | 3,420 |



2-2 Korea Footwear Export & Import

Korea Footwear Main Trading Partners - 2021

| | Exp | port | In | nport |
|----|-----------|-------------|-----------|-------------|
| No | Region | million USD | Region | million USD |
| 1 | China | 131 | China | 1,195 |
| 2 | Vietnam | 71 | Vietnam | 974 |
| 3 | USA | 68 | Italy | 564 |
| 4 | Japan | 38 | Indonesia | 363 |
| 5 | Indonesia | 35 | Cambodia | 53 |
| 6 | Hong Kong | 21 | India | 28 |
| 7 | Cambodia | 7 | Spain | 22 |
| 8 | Taiwan | 6 | Germany | 21 |
| 9 | Thailand | 6 | Myanmar | 20 |
| 10 | Canada | 5 | Portugal | 20 |

3 Korea Footwear Industry - Company

GLOBAL representative Korean footwear manufacture company

| Company | Products | Factory Location |
|----------|-------------------|----------------------------------|
| TAEKWANG | NIKE | Korea, China, Vietnam, Indonesia |
| CHANGSIN | NIKE | Korea, China, Vietnam, Indonesia |
| HWASEUNG | ADIDAS,REEBOK | Korea, Vietnam, Indonesia |
| PARKLAND | ADIDAS, NEWBLANCE | Korea,Indonesia |

DOMESTIC representative Korean footwear manufacture company

| Company | Products | Factory Location | | |
|-----------------|------------------------|---------------------------|--|--|
| TREKSTA | Treksta(outdoor shoes) | Korea | | |
| SAMDUK TONGSANG | OEM(outdoor shoes etc) | Korea, Vietnam ,Indonesia | | |
| HAKSAN VITRO | VITRO(sports shoes) | Korea, Vietnam | | |
| HANYOUNG | Shoes Material | Korea, Vietnam, Indonesia | | |
| SUNGSHIN GLOBAL | Shoes Parts(sole) | Korea, Vietnam, Indonesia | | |



4 Korea Footwear Sales product Category

Market Analysis by Product Type in Korea

| Classification | Market Trends |
|----------------|---|
| Dress | In the Korean shoe market, domestic brands and imported luxury brands coexist. Major domestic brands are Kumgang, Esquire, Elcanto, Mook, Soda, Tandy, and Misope, while imported brands include Ferragamo, Chanel, Gucci, and Prada. |
| Sports | Sports shoes are the largest footwear market in Korea, with imported products dominating the market. The most popular representative brands are Nike and Adidas. In addition, the popularity of professional sports shoes such as golf shoes and tennis shoes continues to increase. And the casual shoe brand market is also a popular market. |
| Outdoor | The outdoor shoe market reflects Korea's unique culture. People like to travel and they like to walk in places with good scenery. Korea is the second largest market for outdoor products. Representative domestic brands include K2, Black Yak, Kolon, and Nepa. |
| Specialized | Korea produces a variety of footwear, including military shoes and safety boots, which are essential for industrial sites. In the footwear production format, Korean footwear companies combine domestic production and overseas factory production. |

5 Korea Footwear Markets

| Classification | Sales market | Shoe stores |
|-------------------------------|--|-------------|
| Department store | LOTTE, SHINSEGAE, HYUNDAI, E-MART, HOME PLUS | |
| Shoes Multi shop | ABC-MART, Shoemarker, LesMore, Foot marker, E-LAND Folder | SHOE MARKER |
| On-line & TV home shopping | Internet mall, CJ-O shopping, Hyundai home shopping. GS home shopping, Lotte home shopping, NS home shopping | MUSINSA |
| Traditional market | 1,450 complexes nationwide Dongdaemun Market etc., | |

(On-line shopping) Currently, online shopping field using the Internet and smartphones is leading the change in the domestic distribution market.



6 Now & future of Korean Footwear Industry

Activities for Promoting the Korean Footwear Industry

| Classification | content | Action |
|------------------------------|---|--|
| Exhibition | Busan International Footwear, Techtextile & Fashion Exhibition -Held every October (Busan BEXCO) | 2022 부산국제신발섬유패션전시회 Busan International Footwear, Techtextile & Fashion Exhibition |
| Technology | Intelligent Shoes Manufacture Center -Digital system of shoe making machine | 지능형신발제조센터 htelligent Shoes Manufacture Center |
| people & people | A meeting of Korean Footewar industry workers -Held every October (KFIA) | |
| Support for the future | Start-up , Advanced material R&D, Marketing , Manpower training, Construction of Footwear clusters -Continue to support government budget | |



Korean Footwear Industries Association

(Zip Code: 46757)

#314 Footwear Industrial Promotion Center 14-55, 382-Ro, Noksan Industrial Complex, Kangseo-Gu, Busan, Korea Tel: +82-51-317-5202 / Fax: +82-51-317-5201 / E-mail contact: chonseein@hanmail.net / Mr, chan yong NOH

The 39TH International Footwear Conference 第 39 屆 國 際 鞋 業 會 議







39th IFC Country Report

Malaysian Footwear Manufacturers Association (MFMA)



14th November 2022

MALAYSIA FOOTWEAR EXPORTS DATA FOR THE YEAR 2019/20/21

Malaysia's Exports to The World (Millions of USD)

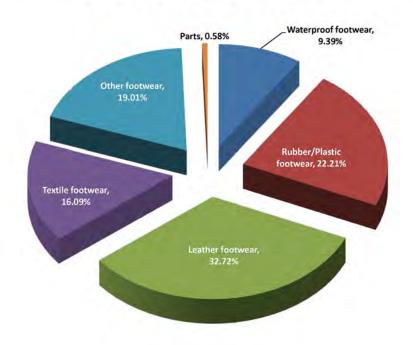
| HS | Description | Description | | | % Change '21/'20 | | | |
|------|-------------------------|-------------|---------|---------|---------------------|--------|-------|---------|
| | | 2019 | 2020 | 2021 | 2019 | 2020 | 2021 | |
| 6401 | Waterproof footwear | 10.462 | 10.063 | 15.751 | 6.96 | 7.16 | 9.39 | 56.52% |
| 6402 | Rubber/Plastic footwear | 45.820 | 33.745 | 37.264 | 30.47 | 24.01 | 22.21 | 10.43% |
| 6403 | Leather footwear | 48.447 | 46.284 | 54.925 | 32.22 | 32.94 | 32.72 | 18.67% |
| 6404 | Textile footwear | 29.842 | 25.308 | 26.994 | 19.85 | 18.01 | 16.09 | 6.66% |
| 6405 | Other footwear | 13.594 | 23.381 | 31.902 | 9.04 | 16.64 | 19.01 | 36.44% |
| 6406 | Parts | 2.199 | 1.736 | 0.976 | 1.46 | 1.24 | 0.58 | -43.82% |
| | TOTAL | 150.365 | 140.517 | 167.812 | 100.00 | 100.00 | 99.99 | 19.42% |

sources from Department of Statistics, Malaysia

US\$1 = RM4.50



MALAYSIA FOOTWEAR EXPORTS DATA FOR THE YEAR 2021



MALAYSIA FOOTWEAR IMPORT DATA FOR THE YEAR 2019/20/21

Malaysia Imports from The World (Millions of USD)

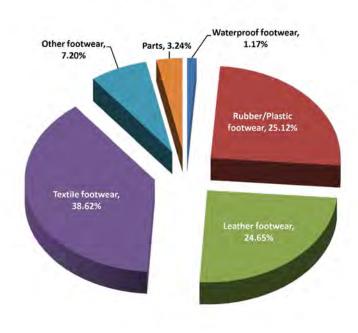
| HS | Description | Value | | | | % Change | | |
|------|-------------------------|---------|---------|---------|--------|----------|--------|--------|
| | Description | 2019 | 2020 | 2021 | 2019 | 2020 | 2021 | 21/'20 |
| 6401 | Waterproof footwear | 14.283 | 3.368 | 4.719 | 2.48 | 0.85 | 1.17 | 40.13% |
| 6402 | Rubber/Plastic footwear | 163.437 | 99.580 | 101.503 | 28.38 | 25.17 | 25.12 | 1.93% |
| 6403 | Leather footwear | 142.787 | 101.824 | 99.610 | 24.79 | 25.74 | 24.65 | -2.17% |
| 6404 | Textile footwear | 209.522 | 149.055 | 156.031 | 36.38 | 37.68 | 38.62 | 4.68% |
| 6405 | Other footwear | 32.029 | 29.361 | 29.088 | 5.56 | 7.42 | 7.20 | -0.93% |
| 6406 | Parts | 13.855 | 12.397 | 13.080 | 2.41 | 3.13 | 3.24 | 5.51% |
| | TOTAL | 575.913 | 395.585 | 404.030 | 100.00 | 100.00 | 100.00 | 2.14% |

sources from Department of Statistics, Malaysia

US\$1 = RM4.50

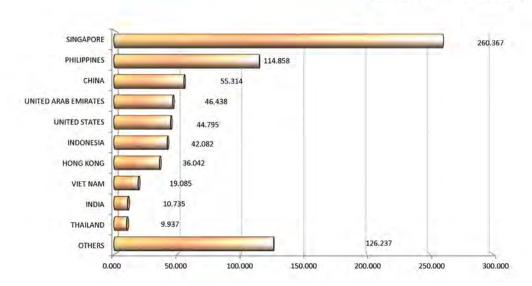


MALAYSIA FOOTWEAR IMPORT DATA FOR THE YEAR 2021





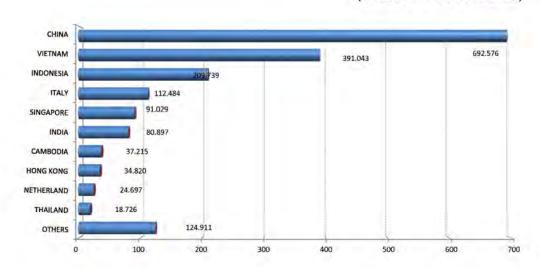
(MILLION RINGGIT MALAYSIA)





2021 MALAYSIA FOOTWEAR IMPORT TOP 10 DESTINATION

(MILLION RINGGIT MALAYSIA)



LABOR COST or WAGES

| TYPE OF WORKERS | USD (US\$) |
|-----------------|------------------|
| NON SKILLED | 333 (MIN. WAGES) |
| SKILLED | 520.00 |
| SUPERVISORY | 694.00 |
| MANAGERIAL | 1,040.00 |

US\$1 = RM4.50

Employment (Amendment) Act 2022 will come into force on the 1 Jan 2023 eg maximum of 45 working hours per week, flexible working arrangement, 98 days of paid maternity leave, 7 days of paid paternity leave and so on in favors of the employee and incurred additional cost to the company operation.



TOP 5 LOCAL BRANDS SHOE RETAILER



Jooi Brothers Sdn Bhd www.asadi.com



Bonia Corporation Berhad www.bonia.com



Christy Ng Sdn Bhd www.christyng.com



Larrie Corporation (M) Sdn Bhd www.larrieshoes.com

Vincci

Padini Holding Berhad www.padini.com

TOP 5 DEPARTMENT STORES



AEON Co (M) Bhd www.aeonretail.com.my



Isetan of Japan Sdn Bhd www.isetankl.com.my



MJ Department Stores Sdn Bhd www.metrojaya.com.my



Parkson Corporation Sdn Bhd www.parkson.com.my



Sogo (KL) Department Store Sdn Bhd www.klsogo.com.my

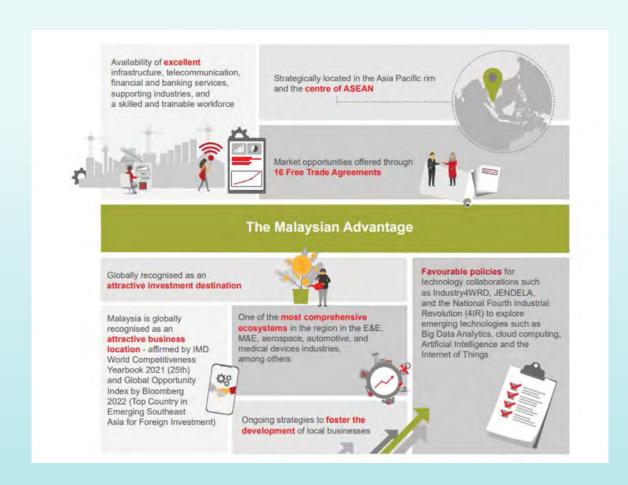


In 2020, Free Trade Agreement (FTA) partners accounted for 66.7% of Malaysia's total trade and 68.0% of Malaysia's total exports

- Malaysia has signed 16 FTAs and implemented 14 FTAs (7 bilateral and 7 regional);
- 1 FTAs (CPTPP) have yet to be ratified. Target ratification date is by 2022.
- RCEP (IOR) have been deposited with ASEAN Secretariat and come into force on 18 March 2022

| | Free Trade Agreement | Year |
|------------|----------------------|------|
| | AFTA | 1992 |
| Γ | CHINA | 2004 |
| £ | ROK | 2006 |
| ASEAN with | JAPAN | 2008 |
| SEA | INDIA | 2009 |
| 1 | AU NZ | 2009 |
| L | HONG KONG | 2019 |







The 39TH International Footwear Conference 第 39 屆 國 際 鞋 業 會 議





COUNTRY REPORT (MYANMAR)

MR.AUNG MIN CHAIRMAN.

Myanmar Footwear manufacturing Association.(MFMA)



The country report sent now is from the beginning of covid-19 to Myanmar until today. Since the covid-19 pandemic hit Myanmar, some factories have been closed due to fewer orders than before. Around October and November 2020, it was found that only 40 of the previous 60 shoesfactories could continue to operate. These operating factories are large overseas (export only) factories and small factories for the local (local) for SME factories are found to be trying to operate for the local market. The country report that will be presented now will be divided into two parts. There are factories for Export Market and local market factories.



(A) FOOTWEAR FACTORY FOR EXPORT MARKET.

90% of these factories are foreign investment (FDI-Foreign Direct Investment). 7% are Myanmar and foreign companies (Joint Venture Company) JVCs, and only 3% are 100% Myanmar-owned companies.FDI companies are big companies like Myanmar Pouchen. They are large companies that come to invest from Taiwan / China / Thailand / Indonesia / Korea / Japan. Before Covid-19, there were more than 60 factories. After Covid-19 and only about 40 are left around October, November 2020. There will be 2-3 Taiwanese companies added by the end of this year.





EXPORT COUNTRIES:

These factories are exporting to foreign countries Japan/Korea/Europe/USA and China. Before covid-19, we were sending about 12 million annually, but from October/November 2020, when Covid started in Myanmar, orders gradually decreased, and by December 2020, only 50% could be exported. In February 2021, due to Myanmar's political instability and the cancellation of some foreign orders, the export of shoes to foreign countries decreased by less than 70%, and some large factories were temporarily suspended.

Currently, politics has started to stabilize and 80% of the factories are also able to operate again. It is estimated that 20 million will be exported from Myanmar until December 2022 this year.

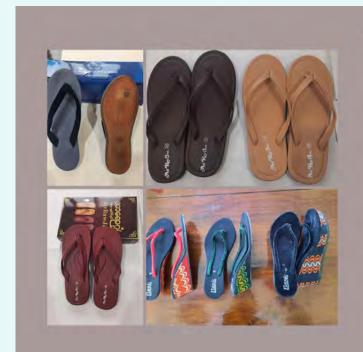


B.FOOTWEAR FACTORY FOR LOCAL MARKET.

80% of the people of Myanmar(male + female) wear longyi, so they usually only wear sandals / slippers. 70% of these slipper are produced by domestic small/medium cottage industries and the remaining 30% are imported from abroad. Most of them are from China/Thailand. These imported shoes are expensive and cannot be used/purchased by the common/basic class. The basic class and middle class only wear locally made shoes. There are basically 2 types of locally produced shoes. There are 2 types of rain rubber shoes and summer + winter leather shoes. Only cow leather is used for leather.







These shoes are Local SME (Shoes produced by small companies.) in Myanmar. The largest home industry is in Yangon, followed by Mandalay. There are about 200 small shoes sewing businesses in Myanmar.

Cow leather is produced in Burma, but it is not up to standard, so it has not yet been able to be exported as a finished product. Only used as locally made shoes.

Locally produced shoes will be presented with photos.

The shoes produced for the local market are genuine leather and artificial leather shoes, 80% of artificial leather to produce artificial leather shoes is imported from China and 20% is imported from Thailand. 80% of the raw materials of slippers produced by local manufacturers are imported from China.





There is a class who wears slippers in Myanmar, common class (male + female) and religious workers (monk + nun). It is different from ordinary people's slippers and monk's and nun's shoes. Slippers for monks and nuns are specially made shoes according to the teachings of Buddha. Myanmar is the only country in the world that produces shoes worn by Buddhist monks and nuns. A company that makes shoes for monks and nuns is not the same as a company that makes shoes for common people. There are about 600,000 monks and 250,000 nuns in Myanmar. As they wear 2 pairs of shoes each year, about 12 million monk shoes and 400,000 nun shoes are produced by domestic monk and nun shoe manufacturing companies.



THANK YOU

Aung Min

The 39TH International Footwear Conference 第 39 屆 國 際 鞋 業 會 議





Philippines



THE FOOTWEAR INDUSTRY



Why Philippines



Fastest-growing among major economies in Asia According to the World Bank's latest edition of Global Economic Prospects, the Philippines is the world's 10th fastest growing economy for 2017. Growth is projected to remain robust at 6.8 percent in 2017 and 6.9 percent in 2018. This growth is led by strong domestic demand, recovery in exports and implementation of planned infrastructure projects which spur additional business activities, create more jobs and increase household consumption and reduce poverty.





THE PHILIPPINE FACTOR



PH IN A DEMOGRAPHIC SWEETSPOT

Filipinos are younger than the rest of the World. The median age in the Philippines is 23.1 years old. This is equivalent to the age of someone who recently graduated from college. All of this translates to the country having very young competent and reliable human resources



RICH TALENT POOL

Our workforce is highly educated and English Proficient, strongly customeroriented, highly trainable with fast learning curve, adaptable to universal cultures and high level of commitment and loyalty



UNRIVALED ACCESS TO KEY MARKETS

The country's location is a critical entry point to over 600 million people in the ASEAN Market and a natural gateway to the East- Asian economies.

The country is likewise placed at the crossroads of international shipping and airlines.



INFRASTRUCTURE DEVELOPMENT

We have a number of operating economic zones and IT parks today, equipped with support capabilities, where a company may locate its business with ease.



EMPLOYMENT INDICATORS Values in Thousands, Growth Rates in Percent

| | | | | | | | | 2022 ^P | | | |
|--|--------|--------|--------|--------|------------------|--------|--------|-------------------|--------|--------|-----------------|
| Indicator | 2018 | 2019 | 2020 | 2021 | Jan ¹ | Feb | Mar | Apr | May | June | M-o-M Growth |
| Total Population 15 Years Old and Over | 71,339 | 72,178 | 73,733 | 75,237 | 75,895 | 76,154 | 76,256 | 76,374 | 76,532 | 76,540 | 0.01 |
| Labor Force | 43,463 | 44,219 | 43,878 | 47,686 | 45,943 | 48,606 | 49,850 | 48,393 | 49,011 | 49,581 | 1.2 |
| Employed | 41,157 | 41,961 | 39,378 | 43,989 | 43,018 | 45,480 | 46,975 | 45,631 | 46,084 | 46,592 | 1.1 |
| Unemployed | 2,303 | 2,258 | 4,500 | 3,697 | 2,925 | 3,126 | 2,875 | 2,762 | 2,927 | 2,990 | 2.1 |
| Underemployed | 6,735 | 5,792 | 6,395 | 6,996 | 6,397 | 6,382 | 7,422 | 6,399 | 6,668 | 5,888 | (11.7) |
| T 9 500 60 | | | 11000 | | | | | 2022 ^P | | | |
| Major Industry Group | 2018 | 2019 | 2021 | 2021 | Jan ¹ | Feb | Mar | Apr | May | June | M-o-M Growth |
| Agriculture | 9,995 | 9,337 | 9,751 | 10,658 | 9,350 | 10,862 | 11,839 | 10,752 | 10,123 | 11,396 | 12.6 |
| Industry | 7,848 | 8,111 | 7,209 | 8,098 | 8,313 | 8,138 | 8,167 | 8,417 | 8,774 | 8,856 | 0.9 |
| Services | 23,313 | 24,513 | 22,418 | 25,233 | 25,355 | 26,480 | 26,969 | 26,462 | 27,187 | 26,339 | (3.1, |

Notes:

- Details may not add up to totals due to rounding.

- Based on part week reference period.

- Averages and rates were computed based on rounded figures.

ANNUAL PHP/US DOLLARS EXCHANGE RATE 2007-2021

| 1 | | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| 1 | Ave. | 46.148 | 44.475 | 47.637 | 45.110 | 43.313 | 42.229 | 42.446 | 44.395 | 45.503 | 47.492 | 50.404 | 52.661 | 51.796 | 49.624 | 49.255 |



COMPARATIVE WAGES (MONTHLY IN US DOLLARS As of 29 July 2022

| Philippines | |
|-------------------------|-----------------|
| Philippines/XI (Peso) | 229.64 |
| Philippines/VII (Peso) | 208.12 - 233.94 |
| Philippines/III (Peso) | 214.58 - 242.01 |
| Philippines/IV-A (Peso) | 179.62 - 233.94 |
| Philippines/NCR (Peso) | 286.64 - 306.54 |
| Indonesia | 121.66 - 298.79 |
| Malaysia | 247.19 - 269.67 |
| Thailand/Bangkok | 257.16 - 276.05 |
| Vietnam/Region I & II | 167.79 - 189.20 |

Philippine Export Performance



Export Value (2012-2021)

In billion USD



2021 exports were 7.2% higher than the pre-pandemic average values from 2017 to 2019.

| 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|------|------|------|------|------|------|------|------|------|------|
| | | | | | | | | | |

Top 10 Exports (Preliminary Jan-Dec 2021)

values in million USD

| | COMMODITY GROUP | 2017-2019 Average | 2020 | 2021 | 2021 vs. 2017-2019 Ave | 2021 vs. 2020 |
|----|--|----------------------|-----------|-----------|---------------------------|---------------|
| 1 | ELECTRONICS (WITH OTHER ELECTRONICS) | 41,617.19 | 40,674.73 | 45,920.14 | 10.34 | 12.90 |
| 2 | OTHER MANUFACTURES | 4,188.87 | 3,601.48 | 4,537.43 | 8.32 | 25.99 |
| 3 | OTHER MINERAL PRODUCTS | 1,315.24 | 2,045.14 | 2,526.59 | 92.10 | 23.54 |
| 4 | MACHINERY & TRANSPORT EQUIPMENT | 3,270.83 | 2,248.32 | 2,372.73 | (27.46) | 5.53 |
| 5 | CATHODES & SECTIONS OF CATHODES, OF REFINED COPPER | 1,220.13 | 1,435.04 | 2,080.85 | 70.54 | 45.00 |
| 6 | CHEMICALS | 1,470.34 | 1,191.74 | 1,774.39 | 20.68 | 48.89 |
| 7 | COCONUT OIL | 1,207.42 | 899.00 | 1,443.51 | 19.55 | 60.57 |
| 8 | METAL COMPONENTS | 1,414.72 | 1,176.40 | 1,409.25 | (0.39) | 19.79 |
| 9 | OTHERS | 1,472.23 | 1,161.36 | 1,178.60 | (19.94) | 1.48 |
| 10 | BANANAS (FRESH) | 1,488.17 | 1,644.30 | 1,123.28 | (24.52) | (31.69) |



Top Export Markets (Preliminary Jan-Dec 2021)

values in million USD

In the preliminary full year data, our top 10 export markets already account for 83.0% of our total exports.

In summary, 8 out of 10 markets showed strong export growth not only in comparison to the previous year but also in comparison to the pre-pandemic years. Exports to Japan posted a notable full recovery which surpassed its pre-pandemic export levels. While exports to Netherlands showed signs of recovering but still not at the pre-pandemic levels. Exports to South Korea remains to decline both in comparison to the previous year and to the pre-pandemic years.

| RANK | MARKET | '17-'19 Ave | 2020 | 2021 | '21 vs '17- '19 Ave (%) | '21 vs '20 (%) |
|------|-----------------------------|-------------|-----------|-----------|-------------------------------|-------------------|
| | TOTAL PH EXPORTS | 64,360.93 | 59,360.46 | 68,374.49 | 6.24 | 15.19 |
| 1 | UNITED STATES OF AMERICA | 10,621.31 | 10,018.38 | 11,848.58 | 11.55 | 18.27 |
| 2 | CHINA, PEOPLE'S REP. OF | 8,882.76 | 9,830.09 | 11,551.41 | 30.04 | 17.51 |
| 3 | JAPAN | 10,616.94 | 10,034.35 | 10,721.32 | 0.98 | 6.85 |
| 4 | HONG KONG SAR | 9,404.33 | 9,225.87 | 9,931.53 | 5.61 | 7.65 |
| 5 | SINGAPORE | 4,040.21 | 3,774.51 | 4,195.45 | 3.84 | 11.15 |
| 6 | THAILAND | 2,896.07 | 2,877.40 | 3,450.76 | 19.15 | 19.93 |
| 7 | GERMANY | 2,728.11 | 2,377.19 | 2,938.42 | 7.71 | 23.61 |
| 8 | KOREA, REP. OF (SOUTH) | 3,394.42 | 2,854.85 | 2,572.63 | (24.21) | (9.89) |
| 9 | TAIWAN | 2,408.55 | 2,121.27 | 2,525.45 | 4.85 | 19.05 |
| 10 | NETHERLANDS | 2,424.69 | 1,919.72 | 2,253.74 | (7.05) | 17.40 |



Philippine Exports/Imports of Footwear Products

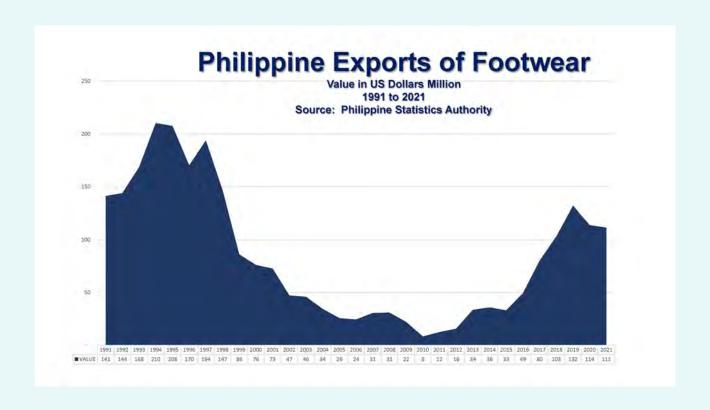


FOOTWEAR: Product Coverage • Leather Footwear • Non-Leather Footwear • Sports Shoes • Slippers and Sandals • Special Use Footwear • Footwear Parts

FOOTWEAR: Situationer

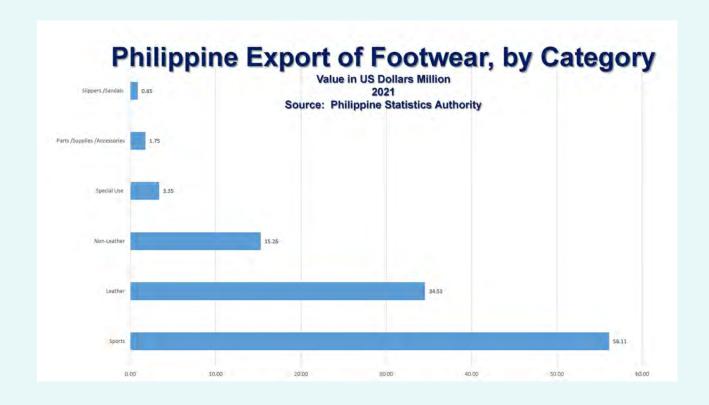
- Major Production sites in PEZA centers and geographically dispersed in Nueva Ecija, Bulacan, Metro Manila, Laguna and Cebu
- No. of Exporters: 359 (based on PSA data as of 2021)















NON-LEATHER (PH Exports US\$15M)

36% 18% 13% 11% 11% 1. USA 2. THAILAND 3. SINGAPORE 4. AUSTRALIA 5. KENYA

SPECIAL USE (PH Exports US\$3M)

75% 12% 6% 5% 3% 1. KOREA 2. SINGAPORE 3. USA 4. GERMANY 5. CANADA

PARTS/SUPPLIES/ACCESSORIES (PH Exports US\$1.75M)

39% 26% 9% 9% 9% 1. JAPAN 2. USA 3. UK 4. CHINA 5. GERMANY

SLIPPERS/SANDALS (PH Exports US\$.85M)

35% 21% 20% 13%

1. VANUATU 2. TONGA 3. MALAYSIA 4. HONG KONG 5. MICRONESIA



"Internationalizing Small Firms"

- 1. Individually sell products to small buyers abroad
- 2. Be part of a cluster of otherwise competitor firms to service volume orders
- 3. Sell its products to a firm linked to a regional or global value chain
- 4. Sell online (partner with reputable e-commerce platforms)







The 39TH International Footwear Conference 第 39 屆 國 際 鞋 業 會 議







2022 TAIWAN FOOTWEAR INDUSTRY REPORT

Report by : Allen Lai Secretary-general TFMA



IMPORTS/EXPORTS VALUE

2021

Taiwan shoe export value: 267,337,000/USD

Taiwan shoe import value: 713,777,000/USD





STATUS OF WAGE SCALE OF FOOTWEAR MANUFACTURER'S

| YEAR:2022 | | | | | | | | 單位:美元 UNIT:USD |
|-----------------------------------|---------------------------|------------------------------------|-------------------------|-----------------------|---------------------------------|---------------------------------------|------------------------------|---|
| CLASSIFICATION 薪資 结構 SALARY | 專業技術人 員 TECHNICIANS | 行政管理人員 ADMINISTRATION CLERKS | 佐 理 人 員 ASSISTANT | 領 班 監 工 LEADMAN | 技術 人員 SKILLED WORK MAN | 半技術 人員 SEMI-SKILLED WORK MAN | 普 通 固 定 工 人 WORKMAN | 每年工作小時 (平均每人) ANNUAL NET WORKING HOUR (AVERAGE PER EMPLOYEE) |
| 平均 AVERAGE | 1500 | 833 | 850 | 1200 | 1133 | 1000 | 867 | 2128 |
| 最高 HIGHEST | 1667 | 900 | 933 | 1333 | 1267 | 1067 | 933 | 2416 |
| 最低 LOWEST | 1333 | 767 | 767 | 1067 | 1000 | 933 | 800 | 1840 |

RAW MATERIAL COST

LEATHER COST

| ITEM | PRICE/USD | |
|---------------|-----------|-----------|
| COW LEATHER | 2.0 USD | 1.2-1.4MM |
| COW SUEDE | 1.6 USD | 1.2-1.4MM |
| GOAT LEATHER | 2.2 USD | 0.8-1.0MM |
| SHEEP LEATHER | 2.4 USD | 0.9-1.1MM |
| COAT SUEDE | 2.4 USD | 1.1-1.3MM |
| PIG LEATHER | 1.1 USD | 0.7-0.9MM |





RAW MATERIAL COST

| Synthetic Leather | SI | ınthetic | Leather |
|-------------------|----|----------|---------|
|-------------------|----|----------|---------|

| ITEM | PRICE/USD | REMARK |
|--|-----------|-------------------|
| 0.8 R/P (PU內裡) | 2.7 USD | Yard ² |
| 0.8mm | 4.5 USD | Yard ² |
| 0.8mm emboss (壓紋) | 4.8 USD | Yard ² |
| emboss+ print | 5.0 USD | Yard ² |
| 0.8mm microfiber (lady shoes)仿完 | 4.7 USD | |
| 1.3~1.5mm microfiber (Athletic) 真超纖 | 16 USD | Yard² |

TAIWAN FOOTWEAR INDUSTRY OVERSEA INVESTMENTS LOCATION MAP





TOP FIVE DEPARTMENT STORES IN TAIWAN



NO.5

Pacific Sogo Department Store



Taipei 101

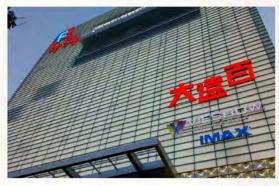
NO.4

TOP FIVE DEPARTMENT STORES IN TAIWAN

NO.3



Shin Kong Mitsukoshi Tainan West Branch



TOP CITY Taichung



TOP FIVE DEPARTMENT STORES IN TAIWAN



Shin Kong Mitsukoshi Taichung

NO.1



MAJOR SHOE BRANDS IN TAIWAN





























FUTURE DIRECTION OF DEVELOPMENTS FOR TAIWAN FOOTWEAR INDUSTRY





FUTURE DIRECTION OF DEVELOPMENTS FOR TAIWAN FOOTWEAR INDUSTRY





FUTURE DIRECTION OF DEVELOPMENTS FOR TAIWAN FOOTWEAR INDUSTRY





Ø ZDHC

"TFMA strives to protect our planet' s future. Joining the ZDHC Foundation' s Roadmap to Zero Programme will help us address environmental, social and governance (ESG) issues to further elevate sustainability for our footwear industry. TFMA has been working with Taiwan's government to implement sustainability programmes, such as the developed Taiwan Intelligent Shoe Machine which helps factories to reduce energy usage and carbon emissions.

We believe the Roadmap to Zero Programme can guide and inspire our members' factories to build a better CMS program."

https://www.roadmaptozero.com/?locale=en



Thank you

Contact: tfma-allen@umail.hinet.net



The 39TH International Footwear Conference 第 39 屆 國 際 鞋 業 會 議









Export Footwear and parts thereof

| | | | | value : million l | JSS | | | | growth rate(%) | | |
|-----|--------------------------------------|--------|--------|-------------------|-------------------|-------------------|-------|---------|----------------|------------------|-------------------|
| no. | catalogue | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2021 (JunJuk) | 2022 (JanJul.) |
| 1 | Sports footwear | 18.56 | 24,69 | 57.57 | 33.54 | 29.43 | -3.15 | 33.04 | 133.14 | 172,51 | -12.27 |
| 2 | Slipper | 108.46 | 86,81 | 89.85 | 52,19 | 61,10 | 6,94 | -19.97 | 3.50 | -2,67 | 17.07 |
| 3 | Footwear with outer soles of leather | 296.80 | 235,40 | 228.38 | 128.58 | 158,31 | -2.12 | -20.69 | -2.98 | -11.50 | 23.12 |
| 4 | Other footwear | 176.31 | 140.19 | 180.75 | 107.29 | 119.43 | 1.56 | -20.48 | 28.93 | 29.74 | 11,31 |
| 5 | Parts of footwear | 34.81 | 25.38 | 31.82 | 17.96 | 24.07 | 17.45 | -27.08 | 25.33 | 18.18 | 34.03 |
| | Total | 634.94 | 512.47 | 588.37 | 339.56 | 392.34 | 1,26% | -19.29% | 14.81% | 9.85% | 15.54% |







Footwear Industry Club

Footwear and parts thereof

| | country/ | | v | alue : million | USS | | | | growth rat | e(%) | | | | share(%) | | |
|-----------|------------------|--------|--------|----------------|-------------------|---------------------|--------|--------|------------|-------------------|-------------------|--------|--------|----------|-------------------|------------------|
| no. | region | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (Jane-Jul.) | 2019 | 2020 | 2021 | 2021 (JanJel.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2023 (JanJul.) | 2022 (JanJul. |
| 1 | U.S.A. | 99.82 | 85.55 | 131.05 | 64.85 | 93.79 | 2:40 | -14.30 | 53.18 | 28.01 | 44.62 | 15.72 | 16.69 | 22.27 | 19,10 | 23.91 |
| 2 | MYANMAR | 44.09 | 39.09 | 39.38 | 23.09 | 26.84 | 5.17 | -11.33 | 0.72 | 3.56 | 16.25 | 6.94 | 7.63 | 6.69 | 6.80 | 6.84 |
| 3 | CHINA | 35.81 | 41.08 | 43.02 | 26.61 | 20,42 | 10.29 | 14.71 | 4.72 | 25.41 | -23.25 | 5.64 | 8.02 | 7.31 | 7.84 | 5.21 |
| 4 | FRANCE | 32.57 | 17.41 | 24.59 | 11.66 | 17,17 | 8.12 | -46.54 | 41.22 | 10.95 | 47.21 | 5.13 | 3.40 | 4,18 | 3,43 | 4,38 |
| 5 | DENMARK | 46.27 | 34.92 | 32.45 | 23.03 | 16,10 | -7.91 | -24.53 | -7.06 | -2.97 | -30.07 | 7.29 | 6.81 | 5.52 | 6.78 | 4.10 |
| 6 | U. ARAB EMIRATES | 27,85 | 18.54 | 23.31 | 13.06 | 15.59 | -5.63 | -33.42 | 25.73 | 12.83 | 19.38 | 4.39 | 3.62 | 3.96 | .3.85 | 3.97 |
| 7 | VIETNAM | 17.07 | 15.44 | 18.86 | 11.64 | 15,58 | 18.06 | -9.52 | 22.09 | 28.30 | 33.78 | 2.69 | 3.01 | 3.20 | 3,43 | 3.97 |
| 8 | NETHERLANDS | 12.37 | 11.74 | 10,79 | 6.74 | 13,45 | 106.83 | -5.09 | -8,06 | -12.27 | 99.57 | 1,95 | 2.29 | 1.83 | 1,99 | 3,43 |
| 9 | UNITED KINGDOM | 48.19 | 30.21 | 13.38 | 9.18 | 13.22 | -5.17 | -37.32 | -55,71 | -54.97 | 43.96 | 7.59 | 5,89 | 2.27 | 2.70 | 3.37 |
| 10 | JAPAN | 26.60 | 21.67 | 19.89 | 12,03 | 12.49 | -6.97 | -18.52 | -8,20 | -18,65 | 3,83 | 4.19 | 4.23 | 3,38 | .3,54 | 3,18 |
| tal 10 re | words- | 390.63 | 315,65 | 356.71 | 201.89 | 244.65 | 237 | -19,19 | 13.01 | 4.30 | 21,18 | 61.52 | 61.59 | 60.63 | 59,45 | 62,36 |
| her | | 244.31 | 196.82 | 231.65 | 137.68 | 147.69 | 47 | -19.44 | 17.69 | 19.16 | 7.27 | 38.48 | 38.41 | 39,37 | 40.55 | 37.64 |
| tal | | 634,94 | 512.48 | 588,36 | 339,57 | 392,34 | 1.26 | -19.29 | 1481 | 9.85 | 15.54 | 100.00 | 100,00 | 100,00 | 100,00 | 100,00 |





Sports footwear

| | | | .V2 | due : million | USS | | | | growth ra | ite(%) | | | | share(%) | | |
|-----------|--------------------|-------|-------|---------------|---------------------|---------------------|--------|---------|-----------|-------------------|-------------------|--------|--------|----------|-------------------|-------------------|
| no. | country/ region | 2019 | 2020 | 2021 | 2021 (Jani-Jul.) | 2022 (Jans-Jul.) | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul.) | 2019 | 2020 | 202) | 2021 (JanJel.) | 2022 (JanJul.) |
| 4 | U.S.A. | 0.86 | 3.93 | 12.89 | 6.87 | 7.73 | -57.77 | 356.71 | 228.37 | 47(-1) | 12.48 | 4.63 | 15.90 | 22.39 | 20.48 | 26.25 |
| 2 | DENMARK | 0.06 | 0.59 | 8.99 | 6.16 | 3.71 | 192.72 | 879.93 | 1,421.46 | 5,402.77 | -39,76 | 0.32 | 2.39 | 15.62 | 18.36 | 12.60 |
| 3 | S. KOREA | 0.45 | 0.59 | 3.88 | 2.36 | 2.40 | 194.95 | 31.06 | 557.62 | 1,114.11 | 1.67 | 2.43 | 2.39 | 6.74 | 7.03 | 8.15 |
| 4. | JAPAN | 0.63 | 0.38 | 3.63 | 2.48 | 1.47 | 87.60 | -39.43 | 851.44 | 1.566.35 | -40.84 | 3.40 | 1.55 | 6.31 | 7.40 | 4.99 |
| 5 | PAKISTAN | 1.62 | 0.32 | 0,79 | 0.50 | 1.41 | -45.65 | -80.21 | 144.17 | 6,189,87 | 183.12 | 8.75 | 130 | 1.36 | 1.48 | 4.78 |
| 6 | POLAND | 0.01 | 0,00 | 0.07 | 0.00 | 1.20 | -67.74 | -100.00 | 0.00 | 0.00 | 400,533.33 | 0.05 | 0.00 | 0.12 | 0.00 | 4.08 |
| 7 | LAOS | 0.98 | 0.79 | 0.73 | 0.45 | 1.13 | -13.43 | -19.79 | -7.99 | -10.55 | 151.38 | 5.30 | 3.20 | 1.26 | 1.34 | 3.83 |
| 8 | NORWAY | 1.71 | 1.49 | 1.21 | 0.18 | 1.07 | 15.38 | -12.93 | -18.72 | -84.85 | 494.39 | 9.20 | 6.02 | 2.10 | 0.54 | 3.63 |
| 9 | FRANCE | 0.23 | 0.58 | 0.48 | 0.29 | 1.05 | 28.68 | 153.11 | -18.06 | -32.83 | 265.96 | 1.24 | 2.35 | 0.83 | 0.86 | 3.58 |
| 10 | CHINA | 0.99 | 7.69 | 2.09 | 1.02 | 0.85 | 7.84 | 676.57 | -72.85 | -74.13 | -17.26 | 5.34 | 31.16 | 3.63 | 3.05 | 2.88 |
| otal 10 n | nords | 7.55 | 16,36 | 34.74 | 20.30 | 22.01 | -18,64 | 116,81 | 112.37 | 16236 | 8,39 | 40.66 | 66.26 | 60.36 | 80.53 | 74.78 |
| ther | | 11301 | 8:33 | 22,82 | 13.24 | 7.42 | 11.38 | -24.35 | 173,93 | 189.71 | -43.95 | 59.34 | 33.74 | 39,64 | 39.47 | 25.21 |
| otal | | 18,56 | 24.69 | 57.57 | 33,54 | 29.43 | -3.15 | 33.04 | 133.14 | 172.51 | -12.27 | 100,00 | 100,00 | 100,00 | 100.00 | 100.00 |

www.fti.or.th





Slipper

| | | | ·V | alue : million | USS | | | | growth rat | e(%) | | | | share(%) | | |
|----------|--------------------|--------|-------|----------------|--------------------|--------------------|--------|----------|------------|--------------------|---------------------|--------|--------|----------|--------------------|--------------------|
| no | country/ region | 2019 | 2020 | 2021 | 2021 (Jam-Jul.) | 2022 (Jan-Jol.) | 2019 | 2020 | 2021 | D(21 (Jun-Jul.) | 2022 (Jane-Jul.) | 2019 | 2020 | 2021 | 2021 (Aug.Jul.) | 0022 (Jan-Jel.) |
| 1 | MYANMAR | 37.59 | 35.22 | 31.81 | 18.39 | 23,07 | 11.59 | -6.30 | -9.69 | -13.89 | 25.43 | 34.66 | 40.58 | 35.41 | 35.24 | 37.76 |
| 2 | CAMBODIA | 14.95 | 12.56 | 10.96 | 5.99 | 7.41 | 27.98 | -15.95 | -12.74 | -23.02 | 23.56 | 13,78 | 14.47 | 12.20 | 11.48 | 12.12 |
| 3 | U. ARAB EMIRATES | 11.55 | 7:24 | 10.53 | 5.36 | -6.26 | -8.19 | -37.29 | 45.31 | 23.08 | 16.76 | 10,65 | 8.35 | 11.72 | 10.27 | 10.25 |
| 4 | SAUDI ARABIA | 4.21 | 3.55 | 2,42 | 1.55 | 2,76 | -8.94 | -15.74 | -31.64 | -39,14 | 78.70 | 3.88 | 4.09 | 2.70 | 2.96 | 4.52 |
| 5 | PHILIPPINES | 0.03 | 1.05 | 2.02 | 0.93 | 2.61 | -87.41 | 2,968.71 | 92.37 | 5,823.57 | 180,99 | 0.03 | 1.21 | 2.25 | 1.78 | 4.28 |
| 6 | VIETNAM | 2.05 | 2.46 | 2.21 | 1.72 | 2.42 | 7.82 | 20.21 | -10.08 | 28.91 | 40.72 | 1.89 | 2.83 | 2.46 | 3.29 | 3,95 |
| 7 | KENYA | 1.06 | 1,74 | 2.87 | 1.07 | 2.36 | -5.69 | 64.69 | 65.06 | 5.94 | 120.62 | 0.97 | 2.01 | 3.20 | 2.05 | 3.87 |
| -8 | KUWAIT | 2.76 | 0.82 | 1.65 | 0.74 | 1.81 | 14.66 | -70.49 | 102.10 | 48.91 | 144.56 | 2.55 | 0.94 | 1.84 | 1.42 | 2.96 |
| 9 | U.S.A. | 1.66 | 0.66 | 0.97 | 0.58 | 1.02 | -40.04 | -60.21 | 45.82 | 50.08 | 75.70 | 1.53 | 0.76 | 1.07 | 1.12 | 1.67 |
| 10 | LAOS | 3.13 | 2.84 | (3.32 | 2.01 | 1,02 | 146.95 | -9.27 | 16.84 | 24.29 | 49.40 | 2.88 | 3.27 | 3.69 | 3.86 | 1.67 |
| tal 10 p | ecords | 79.00 | 68.15 | 68.76 | 38.35 | 50,75 | 9.24 | -13,74 | .90 | -6.25 | 32.33 | 72,83 | 78.50 | 76.53 | 73.47 | 83.05 |
| ber | | 29,47 | (8.66 | 21,08 | 13,84 | 10,36 | 1.23 | -36,67 | 12,99 | 8,84 | -25.18 | 27,17 | 21.50 | 23,47 | 26.53 | 16.95 |
| stal | | 108.46 | 86.81 | 89,85 | 52.19 | 61.10 | 6.94 | -19,97 | 3,50 | -2,67 | 17.07 | 100,00 | 100.00 | 100.00 | 100.00 | 100.00 |







Footwear with outer soles of leather

| | country/ | | value | : million U | ss | | | | growth rate | %) | | | | share(% |) i | |
|---------|----------------|--------|--------|-------------|---------------------|--------------------|---------|--------|-------------|-------------------|-------------------|--------|--------|---------|------------------|-------------------|
| no. | region | 2019 | 2020 | 2021 | 2021 (Jane-Jul.) | 2022 (Jant-Juk) | 2019 | 2020 | 2021 | 2021 (JunJul.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2021 (JanJuk) | 2022 (JanJul.) |
| 1 | U.S.A. | 75.86 | 60.33 | 85.88 | 42.13 | -57.94 | 4.06 | -20.48 | 42.36 | 13.79 | 37,53 | 25.56 | 25.63 | 37.60 | 32.76 | 36.60 |
| 2 | CHINA | 25,52 | 22.46 | 25,98 | 14.89 | 15,20 | 1.65 | -11.97 | 15,65 | 23,54 | 2.06 | 8,60 | 9.54 | 11.37 | 11,58 | 9,60 |
| 3 | NETHERLANDS | 10,65 | 10.61 | 8.75 | 5.71 | 11.23 | 135.93 | -0.39 | -17.51 | ~17,97 | 96.87 | 3.59 | 4.51 | 3.83 | 4.44 | 7,10 |
| 4 | FRANCE | 9.68 | 9.56 | 15.29 | 7.67 | 11.07 | 31.22 | -1.23 | 59.94 | 30.44 | 44.32 | 3.26 | 4.06 | 6,70 | 5.96 | 6,99 |
| 5 | DENMARK | 35.93 | 24.52 | 12.43 | 9.80 | 8.42 | -12.59 | -31.80 | 49.29 | -44.29 | -14.09 | 12.11 | 10.42 | 5.44 | 7.62 | 5.32 |
| 6 | UNITED KINGDOM | 33.63 | 19.69 | 6.50 | 4.99 | 7,00 | 13.94 | -41.44 | -66.98 | -62.27 | 40.19 | 11.33 | 837 | 2.85 | 3.88 | 4.42 |
| 7 | JAPAN | 14.70 | 12.43 | 8.72 | 5,03 | 5.67 | -13.32 | -15,42 | -29.89 | -41.29 | 12.75 | 4.95 | 5.28 | 3.82 | 3.91 | 3.58 |
| 8 | AUSTRALIA | 10,42 | 7.86 | 9,78 | 5,66 | 5,56 | 16,30 | -24.58 | 24.45 | 39,25 | -1.74 | 3.51 | 3.34 | 4.28 | 4,40 | 3.51 |
| 9 | CANADA | 7,01 | 6.80 | 5.95 | 3.77 | 4,85 | -16.27 | -2.94 | -12.50 | -14.86 | 28.82 | 2.36 | 2.89 | 2.61 | 2.93 | 3,07 |
| 10 | GERMANY | 2.13 | 5.09 | 4.27 | 2.29 | 3.53 | -65.11 | 139.08 | -16.18 | -37,63 | 54.05 | 0.72 | 2.16 | 1.87 | 1.78 | 2,23 |
| esal 10 | rocords | 225.55 | 179.36 | 183.55 | 101.93 | 130.47 | 2.09 | -20.48 | 2.34 | -10.17 | 28.00 | 75,99 | .76.19 | 80.37 | 79.27 | 82.42 |
| ther | | 71,25 | 56.04 | 44.83 | 26,65 | 27,84 | -(3.41) | -21.34 | -20.01 | -16,24 | 4.45 | 24,01 | 23.81 | 19.63 | 20,73 | 17,58 |
| otal | | 296,80 | 235,40 | 228,38 | 128,58 | 158.31 | -2.12 | -20.69 | -2.98 | -11,50 | 23.12 | 100,00 | 100,00 | 100.00 | 100,00 | 100,00 |

www.fti.or.th





Other footwear

| | | | valu | e: million U | S5 | | | g | rowth rate(% | (a) | | | | share(%) | | |
|-------------|------------------|--------|--------|--------------|-------------------|-------------------|--------|--------|--------------|--------------------|------------------|--------|--------|----------|-------------------|------------------|
| no, | region | 2019 | 2020 | 2021 | 202) (JanJul.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2021 (Janesluk) | 2022 (JunJoh) | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul. |
| Ü | U.S.A. | 21.02 | 20.19 | 30.13 | 15.08 | 24.88 | 9.79 | -3.95 | 49.18 | 26.86 | 64.97 | 11.93 | 14.40 | 16.67 | 14.05 | 20.83 |
| 2 | INDIA | 12.47 | 11.28 | 14.76 | 7.22 | 10.36 | -22.05 | -9.54 | 30.85 | 44.46 | 43.44 | 7.07 | 8.04 | 8.16 | 6.73 | 8.68 |
| 3 | ITALY | 8.58 | 4.14 | 9,64 | 6.45 | 6.13 | 43.49 | -51.73 | 132.82 | 205.60 | 4.96 | 4.87 | 2.95 | 5.33 | 6.01 | 5.13 |
| 4 | U. ARAB EMIRATES | 5.99 | 5,24 | 6.32 | 4.12 | 5.54 | 8,76 | -12.60 | 20.63 | 14.68 | 34.38 | 3.40 | 3.73 | 3.49 | 3.84 | 4.64 |
| 5. | JAPAN | 10.64 | 8.19 | 7.04 | 4.17 | 5.12 | 0.50 | -23.06 | -14.03 | -25.64 | 22.56 | 6.03 | 5.84 | 3.89 | 3.89 | 4.28 |
| 6 | UNITED KINGDOM | 13,14 | 8.86 | 5,08 | 3.10 | 494 | -33.67 | -32,54 | -42.65 | -51.16 | 59.44 | 7.45 | 6.32 | 2.81 | 2.89 | 4.14 |
| 7 | FRANCE | 21.34 | 6,30 | 8,04 | 3.19 | 4.67 | -1.56 | -70.46 | 27,60 | -11.23 | 46.22 | 12.10 | 4.50 | 4,45 | 2.98 | 3.91 |
| 8 | HONG KONG | 3,17 | 4.74 | 7,57 | 5.07 | 4.63 | 8.54 | 49,33 | 59.78 | 143,33 | -8.62 | 1.80 | 3.38 | 4.19 | 4.73 | 3.88 |
| 9 | MALAYSIA | 4.38 | 6.30 | 9,01 | 7.37 | 3.87 | 99.77 | 43.66 | 43.04 | 62.24 | -47,49 | 2.49 | 4.49 | 4.98 | 6.87 | 3.24 |
| 10 | DENMARK | 8.52 | 9,40 | 10.87 | 6.99 | 3.82 | 13.31 | 10.43 | 15.61 | 22.57 | -45.29 | 4.83 | 6.71 | 6.01 | 6.52 | 3.20 |
| tal 10 reco | rds | 109.25 | 84.64 | 108.45 | 62.77 | 73.96 | 1.87 | -22.52 | 28.13 | 24.36 | 17.82 | 61.96 | 60.37 | 60.00 | 38.51 | 61.93 |
| her | | 67.06 | 55.55 | 72.30 | 44.52 | 45.47 | 7.69 | -17.16 | 30.15 | 38.17 | 2.14 | 38.04 | 39.63 | 40.00 | 41.49 | 38.07 |
| tal | | 176.31 | 140.19 | 180,75 | 107.29 | 119.43 | L56 | -20,48 | 28.93 | 29.74 | 1131 | 100,00 | 100,00 | 100,00 | 100.00 | 100,00 |







Parts of footwear

| | country/ | | 4 | alue : millio | n USS | | | | growth rate | (%) | | | | share(% |) | |
|---------|----------------|-------|-------|---------------|---------------------|-------------------|--------|--------|-------------|-------------------|-------------------|--------|--------|---------|-------------------|-----------|
| no. | region | 2019 | 2020 | 2021 | 2021 (Jant-Jul.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2021 (JunJul.) | (JanJul.) |
| 1 | VIETNAM | 10.97 | 8.80 | 12.10 | 6.89 | 8.74 | 25.55 | -19.73 | 37.46 | 22.66 | 26.80 | 31.50 | 34.67 | 38.03 | 38.37 | 36.30 |
| 2 | INDONESIA | 3.25 | 1.61 | 3,70 | 2.08 | 3.15 | -15.44 | -50.36 | 128.91 | 122.11 | 51.72 | 9.34 | 6.36 | 11.62 | 11.57 | 13.10 |
| 3 | LAOS | 1.76 | 1.24 | 1.56 | 0.82 | 2.38 | 3.57 | -29.83 | 26.45 | 11.53 | 190,17 | 5.06 | 4.87 | 4.92 | 4.57 | 9.89 |
| 4 | U.S.A. | 0.41 | 0,44 | 1.19 | 0.20 | 2.23 | -33.39 | 8,16 | 169.11 | 20.23 | 1,034.93 | 1.17 | 1,74 | 3,73 | 1.10 | 9.28 |
| 5 | PORTUGAL | 1.79 | 1.42 | 1.94 | 1.08 | 1.75 | 57.52 | -20.65 | 36.81 | 51.68 | 61.67 | 5.14 | 5.60 | 5.11 | 6.02 | 7.26 |
| 6 | HONG KONG | 0.68 | 1.07 | 2.04 | 1.20 | 0.72 | 3,47 | 56.88 | 91.41 | 139.52 | 40.08 | 1.95 | 4.21 | 6,42 | 6,67 | 2.98 |
| 7 | CHINA | 1.46 | 1.20 | 1,34 | 0.90 | 0.67 | 321.16 | -17.59 | 11.98 | 50.42 | -26.17 | 4.18 | 4.72 | 4.22 | 5.03 | 2.77 |
| 8 | CAMBODIA | 0.81 | 0.73 | 0.89 | 0.49 | 0.51 | 54.23 | -9.31 | 21.42 | 9.05 | 3.84 | 2.32 | 2.88 | 2.79 | 2.74 | 2.13 |
| 9 | FTALY | 0.09 | 0.02 | 0.39 | 0,05 | 0.49 | -1.02 | -76.21 | 1,759.90 | 215.34 | 859.53 | 0.25 | 0.08 | 1.21 | 0.29 | 2.05 |
| 10 | UNITED KINGDOM | 0.75 | 1.22 | 1.22 | 0.80 | 0.43 | 5.41 | 62.52 | -0.02 | 26.02 | -46.29 | 2.15 | 4.80 | 3.83 | 4.47 | 1.79 |
| otal 10 | records | 21.96 | 17.75 | 2637 | 14.51 | 21.07 | 19.62 | -19.15 | 48.53 | 39,95 | 45.17 | 63.07 | 69.93 | 82.88 | 80.82 | 87.54 |
| ther | | 12.86 | 7.63 | 5.45 | 3,44 | 3.00 | 13,92 | 40.63 | -28,64 | -28.62 | -12.93 | 36.93 | 30.07 | 17.12 | 19.18 | 12.46 |
| otal | | 34.81 | 25,38 | 31,82 | 17,96 | 24,07 | 17,45 | -27,08 | 25,33 | 18.18 | 34.03 | 100,00 | 100.00 | 100.00 | 100.00 | 100.00 |









| | | | | value : milli | on USS | | | | growth rat | te(%) | |
|-----|-------------------------------|--------|--------|---------------|-------------------|-------------------|--------|---------|------------|-------------------|-------------------|
| no. | catalogue | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul.) |
| 1 | Sport Footwear | 206.24 | 165.87 | 146.65 | 104,08 | 83.61 | 48.94 | -19.57 | -11.59 | 3.05 | -19.68 |
| 2 | Leather Footwear | 90,44 | 58.75 | 64.92 | 41.93 | 48.88 | 2,93 | -35.04 | 10.51 | 21.46 | 16.58 |
| 3 | Footwear of Rubber or Plastic | 130.02 | 106.21 | 104.65 | 68.13 | 92.79 | 27.92 | -18.32 | -1.46 | 14.75 | 36.19 |
| 4 | Other Footweat | 232,07 | 193,69 | 184.82 | 119.77 | 111.97 | 8.92 | -16.54 | -4.58 | 8.62 | -6.51 |
| | Total | 658.76 | 524.52 | 501.04 | 333,91 | 337.24 | 21.76% | -20.38% | -4.48% | 9,42% | 1.00% |

www.fti.or.th







FTI





Footwear

| | 100000 | | | value ; million | USS | | | | growth rat | e (%) | | | | share (% |) | |
|---------------|--------------------|--------|--------|-----------------|--------------------|--------------------|-------|--------|------------|-------------------|-------------------|--------|--------|----------|--------------------|-------------------|
| 110. | country/ region | 2019 | 2020 | 2021 | 2021 (Jun-Jul.) | 2022 (Jan-Jul.) | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2021 (Jan-Jul.) | 2022 (JanJul.) |
| 1 | CHINA | 277,47 | 220.29 | 193.49 | 120.65 | 132.45 | 25,07 | -20.61 | -12.17 | -1.89 | 9.78 | 42.12 | 42.00 | 38.62 | 36.13 | 39.28 |
| 2 | VIETNAM | 160.61 | 133.82 | 129.96 | 101.38 | 73.07 | 17.45 | -16.68 | -2.89 | 28.32 | -27,33 | 24.38 | 25.51 | 25.94 | 30.36 | 21.85 |
| 3 | ITALY | 51.24 | 45.61 | 52.89 | 32.14 | 51.21 | 12.03 | -10.99 | 15.97 | 29.44 | 59.32 | 7.78 | 8.70 | 10.56 | 9.63 | 15.18 |
| 4- | INDONESIA | 63,63 | 46.02 | 40.51 | 28:14 | 23.27 | 31.35 | -27.68 | -11.96 | -13.64 | -17.31 | 9.66 | 8.77 | K09 | 8.43 | 6.90 |
| 5 | CAMBODIA | 9,31 | 7.37 | 9.78 | 5,93 | 11.56 | 60.94 | -20.89 | 32.70 | 15.25 | 94.91 | 1.41 | 1.40 | 1.95 | 1.78 | 3.43 |
| 6 | SINGAPORE | 12.07 | 7.84 | 8.39 | 4,48 | 8.00 | 24.96 | -35.04 | 6,93 | 2.17 | 78.68 | 1,83 | 1,50 | 1,67 | 134 | 2,37 |
| 7 | LAOS | 13.44 | 13,68 | 13,69 | 9.18 | 6,78 | 1,54 | 1.74 | 0.11 | 23.10 | -26.15 | 2.04 | 2.61 | 2,73 | 2.75 | 2.01 |
| 8 | TAIWAN | 4.80 | 3,32 | 5.68 | 3,06 | 4.28 | 51.58 | -30.91 | 71.11 | 67.65 | 39.97 | 0.73 | 0.63 | 1.13 | 0.92 | 1.27 |
| 0 | INDIA | 10.66 | 5.12 | 9.70 | 6.20 | 3,45 | 20.26 | -51.93 | 89.29 | 132.15 | -44.38 | 1.62 | 0.98 | 1.94 | 1.86 | 1:02 |
| 10 | BRAZII. | 8,69 | 5.46 | 5.40 | 3.14 | 3.30 | -0.32 | -37.13 | -1.20 | 8.82 | 5.27 | 1.32 | L04 | 1.08 | 0.94 | 0.98 |
| Total 10 rece | eds | 611.93 | 488.53 | 469.48 | 314.29 | 317.97 | 21.85 | -20.17 | -3.90 | 10,76 | 1.17 | 92.89 | 93.14 | 93.70 | 94.12 | 94.29 |
| Other | | 46.83 | 35.99 | 31.56 | 19.62 | 19.27 | 20,64 | -23.14 | -12.32 | -8.33 | -1.78 | 7.11 | 6.86 | 6,30 | 5.88 | 5.71 |
| Total | | 658,76 | 524.52 | 501.04 | 333,91 | 337.24 | 21.76 | -20,38 | -4.48 | 9.42 | 1.00 | 100,00 | 100,00 | 100,00 | 100.00 | 100,00 |

www.fti.or.th



Sports footwear

| | country/ | | V | alue : million | USS | | | - | growth rate (% | 6) | | | | share (%) | | |
|-----------|-----------|--------|--------|----------------|-------------------|-------------------|--------|--------|----------------|-------------------|-------------------|--------|--------|-----------|-------------------|-------------------|
| no. | region | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (Jan-Jul. |
| 4 | CHINA | 72.06 | 58.70 | 44.70 | 29.20 | 29.29 | 56.21 | -18:54 | -23.84 | -14.51 | 0,31 | 34.94 | 35.39 | 30.48 | 28.05 | 35.03 |
| 2 | VIETNAM | 71.10 | 61,36 | 54,62 | 43.64 | 23.20 | 41.10 | -13.70 | -10.97 | 19.94 | -46.85 | 34.47 | 36.99 | 37,25 | 41.93 | 27.75 |
| 3 | INDONESIA | 36.60 | .28,94 | 29.09 | 20.61 | 15.69 | 45,28 | -20.92 | 0.49 | -0.05 | -23.90 | 17.75 | 17.45 | 19.83 | 19.80 | 18.76 |
| 4 | SINGAPORE | 10.84 | 7.02 | 8.09 | 4.27 | 7.67 | 136.68 | -35.25 | 15.26 | 9.91 | 79.78 | 5.26 | 4.23 | 5,52 | 4.10 | 9.18 |
| 5 | MYANMAR | 2.19 | 1.26 | 1.52 | 0.91 | 1.22 | 106.03 | -42.30 | 20.35 | 42.26 | 34,78 | 1.06 | 0.76 | 1.04 | 0.87 | 1.40 |
| 6 | INDIA | 1.27 | 0.71 | 1.24 | 0.72 | 1.20 | 2.45 | -44.12 | 74.78 | 101.17 | 56.68 | 0.62 | 0.43 | 0.85 | 0.69 | 1.44 |
| 7 | HALY | 2.96 | 1,47 | 1,20 | 0.77 | 1,03 | 11.94 | -50,29 | -18.48 | -14,87 | 32.97 | 1544 | 0.89 | 0.82 | 0.74 | 1.23 |
| 8 | JAPAN | 2,00 | 1,74 | 1,33 | 1.07 | 0.97 | 84.57 | -12.81 | -23,83 | -6.42 | -9.29 | 0.97 | 1.05 | 0,90 | 1.02 | 1.16 |
| 9 | HONG KONG | 0.10 | 0.13 | 0.18 | 0.11 | 0.96 | -37.42 | 30.30 | 35.79 | 90.39 | 764.05 | 0.05 | 0.08 | 0.12 | 0.11 | 135 |
| 10 | CAMBODIA | 3.25 | 2.07 | 2.21 | 1.37 | 0.89 | 102.08 | -36,35 | 6.59 | -13.38 | -35,06 | 1.58 | 1.25 | 1.50 | 1.32 | 1.07 |
| stal 10 r | records | 202.37 | 163.41 | 144,18 | 102,67 | 82.11 | 50.92 | -19.25 | -11.77 | 2.95 | -20.03 | 98.12 | 98.51 | 98.31 | 98.64 | 98.21 |
| ther | | 3.87 | 2.47 | 2.47 | 1.42 | 1.50 | -11.57 | -36.20 | .26 | 11.54 | 5.78 | 1.88 | 1.49 | 1.69 | 1.36 | 1.79 |
| otal | | 206,24 | 165,87 | 146,65 | 104.08 | 83,61 | 48.94 | -19.57 | -11.59 | 3,05 | -19.68 | 100.00 | 100,00 | 100,00 | 100,00 | 100,00 |







Leather footwear

| | | | va | lue : million l | 185 | | | | growth rate | (%) | | | | share (% |) | |
|-------------|--------------------|-------|-------|-----------------|-------------------|-------------------|--------|--------|---------------|-------------------|-------------------|--------|--------|----------|--------------------|-------------------|
| no. | country/ region | 2019 | 2020 | 2021 | 2021 (JanJal.) | 2022 (JamInt.) | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (Jandul.) | 2019 | 2020 | 2021 | 2021 (Jan-Jul.) | D(22 (JamSul.) |
| 1 | ITALY | 18.29 | 15.24 | 15.27 | 9.20 | 15.86 | 0.19 | -16.68 | 0.17 | 5.98 | 72.32 | 20.23 | 25.94 | 23.52 | 21.95 | 32.44 |
| 2 | CHINA | 27.92 | 17.40 | 18.89 | 11,30 | 11.82 | -2.19 | -37.70 | 5.71 | 9.68 | 4.63 | 30.88 | 29.61 | 28.33 | 26.95 | 24.18 |
| 3 | VIETNAM | 16.51 | 10.62 | (4,2) | 10,46 | 10.05 | 9.51 | -35.67 | 33,77 | 68.45 | -3.93 | 18,26 | 18.08 | 21.89 | 24.95 | 20.56 |
| 4 | LAOS | 0.83 | 0.46 | 2.36 | 1.62 | 1.87 | -27.22 | -44.63 | 413.78 | 1,831.30 | 15.42 | 0.92 | 0.78 | 3.63 | 3.86 | 3.82 |
| 5 | INDONESIA | 5.61 | .3.27 | 2.97 | 1,90 | 1:65 | -11.35 | -41.64 | -9.18 | -10.00 | -12.87 | 6.20 | 5,57 | 4.58 | 4.52 | 3.18 |
| 6. | CAMBODIA | 1.67 | 0.81 | 1.05 | 0,82 | 1.16 | 36.38 | -51.37 | 29.83 | 48.02 | 40.40 | 1.84 | 1.38 | 1.62 | 1.96 | 2.36 |
| 7 | INDIA | 1.76 | 1.08 | 2.13 | 1,06 | 1.12 | 4.99 | -40,16 | 104.05 | 57.14 | 5.84 | 1.95 | 1,80 | 3.32 | 2.53 | 2.30 |
| 8 | U.S.A. | 1.95 | 1.69 | 2.05 | 1,17 | 0.88 | 18.43 | -13.21 | 21.46 | 10.23 | -24.63 | 2.15 | 2.88 | 3.16 | 2.80 | 1.81 |
| 9 | SPAÍN | 1.77 | 1.28 | 0.85 | 0,51 | 0.78 | 3.20 | -28.05 | -33.53 | -37.12 | 54.37 | 1.96 | 2.17 | 1.31 | 1.21 | 1.60 |
| 10 | PORTUGAL | 1.06 | 0.73 | 0.42 | 0.24 | 0.57 | -2,68 | -30.98 | ⊸11.87 | -48.11 | 135.85 | 1,17 | 1:24 | 0.65 | 0.57 | 1.16 |
| tal 10 reco | ords | 77.37 | 52.55 | 59.73 | 38.28 | 45.76 | .87 | -32.08 | 13.65 | 23.68 | 19.54 | 85.55 | 89.46 | 92.00 | 9130 | 93.62 |
| her | | 13.06 | 6.19 | 5.19 | 3,65 | 3.12 | 17.03 | -52.59 | -16.17 | 2.24 | -14.51 | 14.45 | 10.54 | 8.00 | 8.70 | 6.38 |
| tal | | 90.44 | 58,75 | 64.92 | 41.93 | 48.88 | 2.93 | -35.04 | 10,51 | 21.46 | 16.58 | 100.00 | 100.00 | 100.00 | 100.00 | 100,00 |

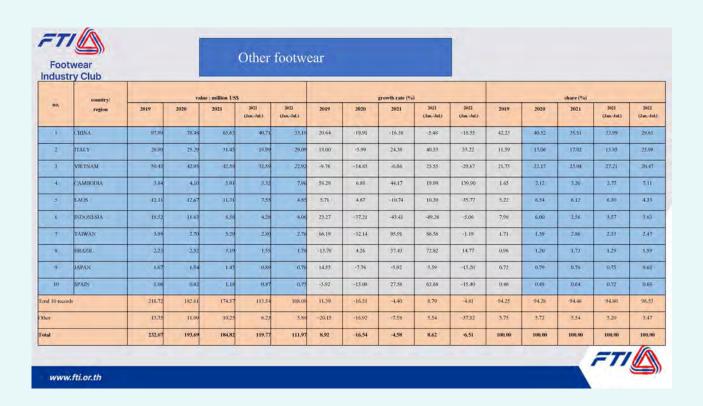
www.fti.or.th



Footwear of rubber or plastic

| | country/ | | Ya | lue : million US | is | | | | growth rate (% | | | | | share (%) | | |
|--------------|-----------|--------|--------|------------------|-------------------|-------------------|--------|--------|----------------|-------------------|-------------------|--------|--------|-----------|-------------------|------------------|
| no. | region | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul.) | 2019 | 2020 | 2021 | 2021 (JanJul.) | 2022 (JanJul. |
| 1. | CHINA | 79.50 | 65.72 | 64.77 | 39.45 | 58.19 | 20.54 | -17,34 | -1.44 | 11.27 | 47,51 | 61.13 | 61.88 | 61.89 | 57.90 | AZ-71 |
| 2 | VIETNAM | 22.57 | 18.89 | 18.54 | 14.68 | 17.50 | 46.67 | -16,31 | -1.86 | 40.53 | 19.22 | 17.36 | 17.79 | 17.72 | 21,55 | 18.86 |
| 3 | STALY | 3,09 | 3,61 | 4.97 | 3,18 | -5.23 | 51.38 | 16.87 | 37.91 | 83,99 | 64,50 | 2.37 | 3,40 | 4.75 | 4,66 | 5.63 |
| .4 | INDONESIA | 2.90 | 2.17 | 1,87 | 1,35 | 1.87 | 52.80 | -25.08 | -13.61 | -4.68 | 38.23 | 2,23 | 2.04 | 1.79 | 1.98 | 2.01 |
| 5 | MALAYSIA | 3,12 | 1.77 | 1.75 | 1.27 | 1,79 | -36,65 | -43,48 | -0.91 | 44.83 | 41,20 | 2,40 | 1,66 | 1.67 | 1,86 | 1.93 |
| 6 | CAMBODIA | 0.56 | 0.39 | 0,61 | 0.42 | 1.55 | 4.84 | -30.63 | 56.87 | 73.75 | 272.28 | 0.43 | 0.56 | 0.58 | 0.61 | 1.67 |
| 7 | TAIWAN | 0.65 | 0.35 | 0.36 | 0.24 | 1.50 | 51.73 | -14.83 | -34,63 | -19,32 | 535.05 | 0.30 | 0.52 | 634 | 0,35 | 1.62 |
| 8 | GERMANY | 0.31 | 1.45 | 2.19 | 0.84 | 1.35 | -23.15 | 368.33 | 50,78 | 57.94 | 60,36 | 0.24 | 137 | 2.09 | 1.24 | 1.45 |
| 0 | BRAZIL | 5.25 | 2.42 | 1.83 | 1.34 | 138 | 8.76 | -53.94 | -24.27 | -13.54 | 0.54 | 4.04 | 2,28 | 1.75 | 1.96 | 1.45 |
| -10 | S. KOREA | 0.71 | 0.61 | 0,48 | 0.29 | 0.66 | -10.25 | -14.29 | -21.64 | -11.43 | 129.81 | 0.54 | 0.57 | 0.45 | 0.42 | 0.71 |
| tal 10 recor | ds | 118.66 | 97.57 | 97.37 | 63.04 | 90.98 | 22.07 | -17.77 | 20 | 19.27 | 44.32 | 91.26 | 91.87 | 93.04 | 92.53 | 98.06 |
| her | | 11.36 | 8.64 | 7.28 | 5.09 | 1.80 | 155.98 | -23.98 | -15.74 | -21,90 | -64.56 | 8.74 | 8.13 | 6.96 | 7.47 | 1.94 |
| otal | | 136.02 | 106,21 | 104.65 | 68.13 | 92,79 | 27.92 | -18.32 | -1.46 | 14.75 | 36,19 | 100,00 | 100.00 | 100.00 | 100,00 | 100,00 |







The 39TH International Footwear Conference 第 39 屆 國 際 鞋 業 會 議





COUNTRY REPORT OF VIETNAM LEATHER

AND FOOTWEAR INDUSTRY UP TO 2021 AND 7 MONTHS OF 2022

1. DATA FOR EXPORT AND IMPORT OF LEATHER AND FOOTWEAR PRODUCTS OF VIETNAM

1.1. VIETNAM LEATHER AND FOOTWEAR PRODUCTION

a. Vietnam's economic situation in the first 8 months of 2022

Industrial production in August continued the trend of rapid recovery due to enterprises' efforts to expand production to compensate for the 2-year period affected by the Covid-19 epidemic.

The Industrial Production Index (IIP) in August was estimated to increase by 2,9% compare last month and increased 15,6% compare to the same period of last year. In which, compared to the same period last year, the processing and manufacturing industry increased by 16,2%.

In the first 8 months of 2022, IIP is estimated to increase by 9.4% over the same period last year (the same period in 2021 increased by 5.5%). In which, the processing and manufacturing industry increased by 10.4% (the same period in 2021 increased by 7%).

Leather and footwear production in 08/2022 increased slightly compared to 07/2022 with an increase of 0,4%. Compared to the same period last year, leather and footwear production in August 2022 increased by 57,0% and the first 8 months of 2022 increased by 18,5% compared to the first 8 months of 2021. The index of employers of the leather and footwear industry in August 2022 increased by 1,0% over the same period last month and increased sharply by 55,1% over the same period last year.

TABLE 1: ECONOMIC INDICATORS AND INDUSTRIAL PRODUCTION

| Index | 2017 | 2018 | 2019 | 2020 | 2021 | 8M/22 |
|------------------------------|------|------|------|------|------|-------|
| GDP, % | 6.8 | 7.1 | 7.02 | 2.91 | 2.58 | |
| CPI. % | 3.53 | 3.54 | 2.79 | 3.23 | 4.82 | 2.58 |
| Ind. Manufact. Index,% | 14.7 | 12.2 | 10.4 | 4.9 | 6.37 | 10.4 |
| Footwear production index. % | 7.1 | 10.4 | 9.9 | -2.4 | 5.2 | 18.5 |

(Source: GSO)

1.2. EXPORT OF SHOES AND HANDBAGS IN THE FIRST 7 MONTHS OF 2022

1.2.1. Footwear export turnover

In the first 7 months of 2022, the total export turnover of leather and footwear reached 16,45 billion USD (up 19,4%), of which footwear exports reached 14.06 billion USD (up 19,1%) and suitcases-bags reached 2,39 billion USD (up 20,9%) over the same period in 2021.



TABLE 2. LEATHER AND FOOTWEAR EXPORT TURNOVER IN 2010 - 2022

(Unit: USD billion)

| | | | | | 20 | 21 | 7M/2022 | | |
|----------|-------|-------|-------|-------|-------|------------------|---------|---------------|--|
| Product | 2017 | 2018 | 2019 | 2020 | Value | Incr. to 2020 | Value | Incr. to 2021 | |
| Footwear | 14.70 | 16.24 | 18.33 | 16.75 | 17.77 | 6.1% | 14.06 | 19.1% | |
| Handbag | 3.26 | 3.39 | 3.75 | 3.11 | 3.01 | -3.2% | 2.39 | 20.9% | |
| Sum | 17.96 | 19.63 | 22.08 | 19.86 | 20.78 | 4.6% | 16.45 | 19.4% | |

(Source: GDC)

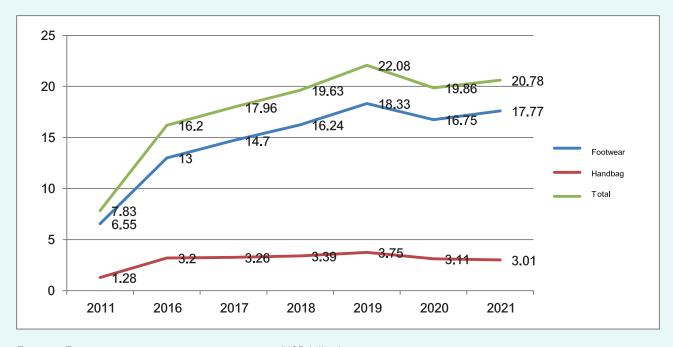


Figure 1. Footwear export turnover 2011 - 2021 (USD billion)

TABLE 3. IMPORT AND EXPORT OF THE LEATHER AND FOOTWEAR INDUSTRY IN THE MONTHS OF 2022

(Unit: Million USD)

| | | | | | (- | | |
|----------|-----------------|---------|---------|---------|---------|--------|----------|
| | | EXPORT | | | IMPORT | | BALANCE |
| | FOOTWEAR | HANDBAG | SUM | MACHINE | LEATHER | SUM | OF TRADE |
| SUM | 14060.7 | 2389.8 | 16450.5 | 73.7 | 1080.9 | 1154.6 | 15295.9 |
| January | 1937.9 | 390.3 | 2328.3 | 10.2 | 130.7 | 140.8 | 2187.5 |
| February | 1345.0 | 208.5 | 1553.6 | 4.5 | 124.8 | 129.3 | 1424.2 |
| March | 2009.3 | 346.9 | 2356.2 | 7.2 | 168.7 | 175.9 | 2180.3 |
| April | 2019.5 | 332.3 | 2351.8 | 14.6 | 181.1 | 195.7 | 2156.1 |
| May | 2111.4 | 353.3 | 2464.6 | 14.0 | 171.0 | 185.0 | 2279.6 |
| June | 2364.8 | 389.1 | 2753.9 | 12.8 | 152.0 | 164.7 | 2589.1 |
| July | 2272.8 | 369.3 | 2642.1 | 10.4 | 152.6 | 163.0 | 2479.1 |

(Source: GDC)



TABLE 4. EXPORTS OF FDI ENTERPRISES 2016 - 2022

| Year | То | tal | Foot | wear | Hand | dbag |
|--------|-------------|-------------|-------------|-------------|-------------|-------------|
| Teal | Billion USD | Value share | Billion USD | Value share | Billion USD | Value share |
| 2016 | 13.04 | 80.5% | 10.49 | 80.7% | 2.55 | 79.7% |
| 2017 | 14.45 | 80.3% | 11.82 | 80.4% | 2.65 | 80.3% |
| 2018 | 15.39 | 78.4% | 12.81 | 78.9% | 2.58 | 76.1% |
| 2019 | 16.66 | 75.5% | 13.95 | 76.1% | 2.71 | 72.3% |
| 2020 | 15.37 | 77.4% | 13.25 | 79.1% | 2.12 | 68.2% |
| 2021 | 16.07 | 77.4% | 14.01 | 78.9% | 2.06 | 68.5% |
| 7/2022 | 13.06 | 79.42% | 11.35 | 80.74% | 1.71 | 71.64% |

(Source: GDC)

1.2.2. Export market

Vietnam's total footwear export turnover in the first 7 months of 2022 continued to increase with an increase of 19,4% over the same period in 2021. The strongest gains remained in North America (29,2%), Europe (21,3 %), South America (15,6%) and slight increases in Asia (0,2%) and Oceania (3,8%).

The US is still Vietnam's largest footwear import market, reaching 7215,6 million USD (28,3%), Belgium continues to be the 2nd market reaching 1015,5 million USD (24,8%), China is the 3rd market reaching 1007,4 million USD (-15,8%).

TABLE 5. VIETNAM'S LEATHER AND FOOTWEAR EXPORTS TO CONTINENTS

(Unit: Million USD)

| | | | 2021 | | | | 7 month | s / 2022 | | |
|-----|------------------|---------|----------|---------|---------|--------|---------|----------|--------|--------|
| No | MARKET | Sum | Footwear | Handbag | Sı | ım | Foot | wear | Hand | dbag |
| | | USD | USD | USD | USD | Incr.% | USD | Incr.% | USD | Incr.% |
| 1 | NORTH AMERICA | 9545.5 | 8122.7 | 1422.8 | 7904.5 | 29.2 | 6676.8 | 28.5 | 1227.6 | 32.7 |
| Ш | EUROPE | 5598.3 | 4822.4 | 775.8 | 4569.4 | 20.4 | 3981.9 | 21.3 | 587.5 | 14.7 |
| III | ASIA | 4351.2 | 3745.8 | 605.3 | 3012.9 | 0.2 | 2586.5 | -0.4 | 426.4 | 3.6 |
| IV | SOUTH AMERICA | 470.8 | 455.9 | 14.9 | 375.4 | 16.7 | 364.5 | 15.6 | 10.9 | 37.6 |
| V | OCEANIA | 405.0 | 359.1 | 45.9 | 289.4 | 3.8 | 258.2 | 4.2 | 31.2 | 0.6 |
| VI | DIFFERENT | 408.6 | 263.2 | 145.3 | 298.9 | 17.5 | 192.8 | 16.2 | 106.1 | 19.9 |
| | Total | 20779.2 | 17769.2 | 3010.0 | 16450.5 | 19.4 | 14060.7 | 19.1 | 2389.8 | 20.9 |



TABLE 6. TOP 05 VIETNAM'S LEATHER AND FOOTWEAR EXPORT MARKET

| | | | | 2021 | | | 7 months - 2022 | | | | |
|----|---------|------------------|----------------|------------------|----------------|------------------|-----------------|----------------|------------------|----------------|---------------------|
| | | Sum | Foot | wear | Handbag | | Sum | Foot | wear | Handbag | |
| NO | | (Million USD) | Million USD | % Value share | Million USD | % Value share | | Million USD | % Value share | Million USD | % Value share |
| 1 | USA | 8764.6 | 7436.8 | 51.7 | 1327.8 | 53.5 | 7215.6 | 6103.3 | 53.4 | 1112.3 | 56.1 |
| 2 | EU(27)* | 4702.7 | 4042.8 | 28.1 | 659.9 | 26.6 | 3946.9 | 3425.2 | 30.0 | 521.7 | 26.3 |
| 3 | China | 1718.3 | 1595.7 | 11.1 | 122.5 | 4.9 | 1007.4 | 935.1 | 8.2 | 72.3 | 3.6 |
| 4 | Japan | 1066.7 | 807.3 | 5.6 | 259.4 | 10.5 | 804.0 | 604.1 | 5.3 | 199.9 | 10.1 |
| 5 | Korea | 614.3 | 503.5 | 3.5 | 110.8 | 4.5 | 445.7 | 367.5 | 3.2 | 78.2 | 3.9 |
| | Total | 16866.5 | 14386.1 | 100 | 2480.4 | 100 | 13419.6 | 11435.2 | 81.3 | 1984.4 | 83.0 |

Top 5 export markets of Vietnam

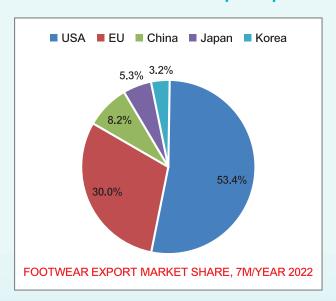




Figure 2: Vietnam leather and footwear export market share in 5 key markets in the first 7 months in 2022



TABLE 7: TOP 15 EXPORTING MARKETS OF LEATHER AND FOOTWEAR OF VIETNAM (Unit: Million USD)

| | | | 2021 | | | | 7 month | s - 2022 | | |
|----|-------------|---------|----------|---------|---------|---------|---------|----------|--------|---------|
| NO | Market | Sum | Footwear | Handbag | Sı | ım | Foot | wear | Hand | dbag |
| | | Value | Value | Value | Value | Incr. % | Value | Incr. % | Value | Incr. % |
| 1 | USA | 8764.6 | 7436.8 | 1327.8 | 7215.6 | 28.3 | 6103.3 | 28.4 | 1112.3 | 28.0 |
| 2 | China | 1718.3 | 1595.7 | 122.5 | 1007.4 | -15.8 | 935.1 | -15.7 | 72.3 | -16.9 |
| 3 | Japan | 1066.7 | 807.3 | 259.4 | 804.0 | 8.3 | 604.1 | 5.8 | 199.9 | 16.9 |
| 4 | Belgium | 1211.5 | 1130.7 | 80.8 | 1015.5 | 24.8 | 949.3 | 25.3 | 66.2 | 18.0 |
| 5 | Germany | 990.3 | 843.7 | 146.6 | 888.0 | 28.3 | 774.0 | 31.0 | 114.0 | 12.9 |
| 6 | Netherlands | 902.6 | 714.7 | 188.0 | 760.0 | 24.2 | 602.8 | 22.7 | 157.3 | 30.2 |
| 7 | Korea | 614.3 | 503.5 | 110.8 | 445.7 | 7.0 | 367.5 | 6.7 | 78.2 | 8.7 |
| 8 | U.K. | 636.4 | 545.5 | 90.9 | 491.7 | 16.6 | 429.5 | 18.1 | 62.1 | 7.5 |
| 9 | France | 549.3 | 450.9 | 98.4 | 450.3 | 16.1 | 375.1 | 16.7 | 75.2 | 13.5 |
| 10 | Canada | 458.6 | 369.1 | 89.5 | 458.2 | 54.1 | 350.0 | 42.4 | 108.2 | 109.7 |
| 11 | Italy | 353.8 | 275.1 | 78.7 | 294.5 | 26.1 | 237.3 | 31.3 | 57.2 | 8.5 |
| 12 | Australia | 355.6 | 309.8 | 45.9 | 257.1 | 4.0 | 225.9 | 4.5 | 31.2 | 0.6 |
| 13 | Mexico | 321.0 | 315.5 | 5.5 | 230.7 | 15.8 | 223.5 | 14.7 | 7.1 | 0.0 |
| 14 | HongKong | 184.6 | 115.6 | 69.1 | 117.2 | 0.1 | 79.6 | 12.3 | 37.5 | -18.7 |
| 15 | Spain | 237.7 | 217.1 | 20.6 | 195.3 | 29.2 | 175.5 | 25.6 | 19.8 | 74.6 |
| | Total 15 | 18365.4 | 15631.0 | 2734.4 | 14631.1 | 20.4 | 12432.5 | 20.1 | 2198.6 | 22.3 |
| Va | lue share,% | 88.4 | 88.0 | 90.8 | 88.9% | | 88.4 | · | 92.0 | |

(Source: GDC)

1.3. FOOTWEAR EXPORT TO FTA'S MARKETS

Continuing to reflect the rapid recovery after the Covid-19 pandemic, Vietnam's leather and footwear exports to the EVFTA, CPTPP and UKVFTA regional markets still grew strongly (22,8%, 17,3% and 16,6,% respectively). Particularly, the EAEU market, due to the impact of the conflict between Russia and Uganda, has created a huge crisis, so the growth rate has decreased greatly (-60,0%). ASEANrecovers with rebound (13,1%).

TABLE 8. EXPORTING LEATHER AND FOOTWEAR TO FTA MARKETS IN 7 MONTHS, 2022 (Unit: Million USD)

| | | | SUM | | F | OOTWEA | R | HANDBAG | | | |
|----|--------|--------|---------------|---------------|--------|---------------|---------------|---------|---------------|---------------|--|
| NO | AREA | USD | Increase % | Density, % | USD | Increase % | Density, % | USD | Increase % | Density, % | |
| 1 | ASEAN | 228.5 | 13.1 | 1.39 | 213.0 | 15.3 | 1.52 | 15.5 | -10.1 | 15.5 | |
| 2 | CPTPP | 2044.6 | 17.3 | 12.4 | 1682.6 | 14.4 | 12.0 | 361.9 | 32.6 | 15.1 | |
| 3 | EAEU | 45.1 | -60.0 | 0.27 | 41.4 | -57.3 | 0.29 | 3.7 | -76.5 | 0.15 | |
| 4 | EVFTA | 3929.5 | 22.8 | 23.9 | 3407.8 | 23.4 | 24.2 | 521.7 | 18.9 | 21.8 | |
| 5 | UKVFTA | 491.7 | 16.6 | 3.0 | 429.5 | 18.1 | 3.1 | 62.1 | 7.5 | 2.6 | |



TABLE 9. VIETNAM'S LEATHER AND FOOTWEAR EXPORT TO ASEAN COUNTRIES

(Unit: Million USD)

| | | | 2021 | | | | 7 month | ıs - 2022 | | |
|------|-------------|-------|----------|---------|-------|---------|---------|-----------|---------|---------|
| NO | Countries | Sum | Footwear | Handbag | Sum | | Foot | wear | Handbag | |
| | | Value | Value | Value | Value | Incr. % | Value | Incr. % | Value | Incr. % |
| 1 | Singapore | 95.7 | 87.0 | 8.8 | 71.3 | 10.2 | 64.1 | 9.0 | 7.2 | 22.6 |
| 2 | Thailand | 54.1 | 51.7 | 2.4 | 35.2 | -14.4 | 35.2 | -9.1 | - | - |
| 3 | Malaysia | 55.3 | 43.5 | 11.7 | 45.8 | 12.5 | 37.5 | 18.2 | 8.3 | -7.7 |
| 4 | Philippines | 29.5 | 29.5 | - | 35.3 | 71.3 | 35.3 | 71.3 | - | - |
| 5 | Indonesia | 49.8 | 49.8 | - | 41.0 | 17.4 | 41.0 | 17.4 | - | - |
| Tota | I ASEAN 5 | 284.4 | 261.5 | 22.9 | 228.5 | 13.1 | 213.0 | 15.3 | 15.5 | -10.1 |
| Valu | ie share, % | 1.37 | 1.47 | 0.76 | 1.39 | | 1.52 | | 0.65 | |

^{*} Note: The ATIGA Agreement came into force on May 17, 2010.

(Source: GDC)

TABLE 10. VIETNAM'S LEATHER AND FOOTWEAR EXPORT TO CPTPP COUNTRIES

| | | | 2021 | | | | 7 month | s - 2022 | | |
|------|----------------|----------------|----------------|----------------|----------------|---------|----------------|----------|----------------|---------|
| NO | Market | Sum | Footwear | Handbag | Su | ım | Foot | wear | Hand | dbag |
| NO | Market | Million USD | Million USD | Million USD | Million USD | Incr. % | Million USD | Incr. % | Million USD | Incr. % |
| 1 | Japan | 1066.7 | 807.3 | 259.4 | 804.0 | 8.3 | 604.1 | 5.8 | 199.9 | 16.9 |
| 2 | Canada | 458.6 | 369.1 | 89.5 | 458.2 | 54.1 | 350.0 | 42.4 | 108.2 | 109.7 |
| 3 | Australia | 355.6 | 309.8 | 45.9 | 257.1 | 4.0 | 225.9 | 4.5 | 31.2 | 0.6 |
| 4 | Mexico | 321.0 | 315.5 | 5.5 | 230.7 | 15.8 | 223.5 | 14.7 | 7.1 | 64.5 |
| 5 | Chile | 129.2 | 127.4 | 1.7 | 104.2 | 21.6 | 104.2 | 21.6 | - | - |
| 6 | Singapore | 95.7 | 87.0 | 8.8 | 71.3 | 10.2 | 64.1 | 9.0 | 7.2 | 22.6 |
| 7 | Malaysia | 55.3 | 43.5 | 11.7 | 45.8 | 12.5 | 37.5 | 18.2 | 8.3 | -7.7 |
| 8 | Peru | 51.3 | 51.3 | - | 41.0 | 16.8 | 41.0 | 16.8 | - | - |
| 9 | New Zealand | 49.3 | 49.3 | - | 32.3 | 2.4 | 32.3 | 2.4 | - | - |
| 10 | Brunei | - | - | - | - | - | - | - | - | - |
| То | tal CPTPP | 2582.8 | 2160.2 | 422.5 | 2044.6 | 17.3 | 1682.6 | 14.4 | 361.9 | 32.6 |
| Valu | ue share, % | 12.4 | 12.2 | 14.0 | 12.4 | | 12.0 | | 15.1 | |

^{*} Note: The CPTPP Agreement came into force on January 14, 2019.

(Source: GDC)



TABLE 11. VIETNAM'S LEATHER AND FOOTWEAR EXPORT TO EAEU COUNTRIES

| | | | 2021 | | 7 months - 2022 | | | | | | |
|-----|-----------------------|----------------|----------------|----------------|-----------------|---------|----------------|---------|----------------|---------|--|
| NO | Market | Sum | Footwear | Handbag | Handbag Sum | | Foot | wear | Handbag | | |
| | | Million USD | Million USD | Million USD | Million USD | Incr. % | Million USD | Incr. % | Million USD | Incr. % | |
| 1 | Russian Federation | 166.1 | 141.1 | 25.0 | 45.1 | -60.0 | 41.4 | -57.3 | 3.7 | -76.5 | |
| 2 | Belarus | - | - | - | - | - | - | - | - | - | |
| 3 | Armenia | - | - | - | - | - | - | - | - | - | |
| 4 | Kazakhstan | - | - | - | - | - | - | - | - | - | |
| 5 | Kyrgyzstan | - | - | - | - | - | - | - | - | - | |
| T | otal EAEU | 166.1 | 141.1 | 25.0 | 45.1 | -0.6 | 41.4 | -0.6 | 3.7 | -0.8 | |
| Val | ue share, % | 0.8 | 0.79 | 0.83 | 0.27 | | 0.29 | | 0.15 | | |

^{*} Note: The VN-EAEU FTA came into force on October 5, 2016.

(Source: GDC)

TABLE 12. VIETNAM LEATHER AND FOOTWEAR EXPORT TO EU COUNTRIES (million USD)

| | | | 2021 | | 7 months - 2022 | | | | | | |
|------|----------------|--------|----------|---------|-----------------|---------|--------|---------|-------|---------|--|
| NO | Market | Sum | Footwear | Handbag | Su | ım | Foot | wear | Han | dbag | |
| | | Value | Value | Value | Value | Incr. % | Value | Incr. % | Value | Incr. % | |
| 1 | Germany | 990.3 | 843.7 | 146.6 | 888.0 | 28.3 | 774.0 | 31.0 | 114.0 | 12.9 | |
| 2 | Belgium | 1211.5 | 1130.7 | 80.8 | 1015.5 | 24.8 | 949.3 | 25.3 | 66.2 | 18.0 | |
| 3 | Netherlands | 902.6 | 714.7 | 188.0 | 760.0 | 24.2 | 602.8 | 22.7 | 157.3 | 30.2 | |
| 4 | Spain | 237.7 | 217.1 | 20.6 | 195.3 | 29.2 | 175.5 | 25.6 | 19.8 | 74.6 | |
| 5 | Italy | 353.8 | 275.1 | 78.7 | 294.5 | 26.1 | 237.3 | 31.3 | 57.2 | 8.5 | |
| 6 | France | 549.3 | 450.9 | 98.4 | 450.3 | 16.1 | 375.1 | 16.7 | 75.2 | 13.5 | |
| 7 | Sweden | 98.3 | 73.6 | 24.7 | 84.9 | 20.8 | 65.9 | 23.8 | 19.0 | 11.4 | |
| 8 | Denmark | 9.2 | 7.0 | 2.2 | 18.7 | 169.7 | 15.7 | 172.4 | 3.0 | 156.4 | |
| 9 | Czech Rep | 92.1 | 92.1 | - | 54.2 | -4.5 | 54.2 | -4.5 | - | - | |
| 10 | Austria | 26.4 | 15.8 | 10.6 | 18.5 | 8.9 | 15.1 | 34.6 | 3.4 | -41.3 | |
| 11 | Poland | 50.2 | 41.9 | 8.3 | 38.4 | 5.7 | 31.7 | 2.9 | 6.7 | 21.5 | |
| 12 | Greek | - | - | - | - | - | - | - | - | - | |
| 13 | Finland | 16.6 | 16.6 | - | 2.8 | -78.7 | 2.8 | -78.7 | - | - | |
| 14 | Slovenia | 98.8 | 98.8 | - | 67.4 | 7.7 | 67.4 | 7.7 | - | - | |
| 15 | Portugal | 1.1 | - | 1.1 | - | - | - | - | - | - | |
| 16 | Slovakia | - | - | - | - | - | - | - | - | - | |
| 17 | Luxembourg | 39.9 | 39.9 | - | 38.2 | 43.6 | 38.2 | 43.6 | - | - | |
| 18 | Bungaria | 1.5 | 1.5 | - | - | - | - | - | - | - | |
| 19 | Serbia | 7.6 | 7.6 | - | 2.8 | -41.0 | 2.8 | -41.0 | - | - | |
| Othe | er countries / | _ | _ | _ | _ | - | - | _ | _ | | |
| | regions | | | | | | | | | | |
| | Total EU | 4686.8 | 4026.9 | 659.9 | 3929.53 | 22.8 | 3407.8 | 23.4 | 521.7 | 18.9 | |
| Val | ue share, % | 22.6 | 22.7 | 21.9 | 23.9 | | 24.2 | | 21.8 | | |

(*Including England) (Source: GDC)



2. IMPORT DATA OF EQUIPMENT AND LEATHER

In the first 7 months of 2022, equipment imports reached 73,7 million USD (decrease -4,2%) and leather imports reached 1080,9 million USD (up 2.24%) over the same period in 2021, reflecting that new investment is still limited after the Covid-19 pandemic.

TABLE 13. IMPORT MARKET OF LEATHER AND FOOTWEAR MACHINES AND EQUIPMENT

(HS: 845310; 845320; 845380; 845390)

(Million USD)

| | 2017 | 2018 | 2019 | 2020 | 2021 | 7 months - 2022 | | |
|---------------------------|------|-------|-------|------|--------|-----------------|-----------------|--------------------------------|
| Market | | | | | | USD | Density 2022, % | Increase compared to 7M/2021,% |
| China | 66 | 65 | 80 | 45.6 | 72.38 | 46.09 | 62.5 | -1.6 |
| Taiwan | 52 | 41 | 48.7 | 29.0 | 28.21 | 19.37 | 26.3 | 1.2 |
| Korea (Republic) | 16 | 18.3 | 17 | 7.5 | 7.79 | 3.80 | 5.2 | -36.6 |
| Italy | | 10 | 15 | 4.9 | 5.70 | 3.71 | 5.0 | -13.7 |
| Germany | 20 | 18.2 | 0.5 | 2.7 | - | - | - | - |
| United States | - | - | - | - | - | - | - | - |
| France | - | - | - | - | 1.19 | - | - | - |
| Switzerland | | | | | | 0.08 | 0.1 | - |
| Other countries / regions | - | - | - | - | 1.47 | 0.65 | 0.9 | -8.9 |
| Sum | 168 | 155.5 | 164.8 | 92.8 | 117.16 | 73.70 | 100.0 | -4.2 |

(Source: GDC)



TABLE 14. LEATHER IMPORT MARKET (HS: 4107-4115)

(Million USD)

| | 7 months - 2022 | | | | (111111011 03D) | | | |
|----|----------------------------|-------|-------|--------|-----------------|---------|--------------------|---------------------------|
| No | Market | 2018 | 2019 | 2020 | 2021 | 7M 2022 | Density 2022, % | Increased vs 7M/2021,% |
| 1 | China | 325 | 380 | 378.1 | 513.7 | 352.87 | 32.65 | 5.17 |
| 2 | Italy | 244 | 239 | 193.0 | 239.4 | 117.83 | 10.90 | -28.35 |
| 3 | Thailand | 232 | 241 | 195.9 | 183.4 | 150.40 | 13.91 | 24.84 |
| 4 | South Korea | 161 | 178 | 112.6 | 124.3 | 78.16 | 7.23 | -5.25 |
| 5 | Taiwan | 124 | 99 | 71.8 | 75.3 | 53.47 | 4.95 | 15.45 |
| 6 | India | 109 | 88 | 56.3 | 60.6 | 43.07 | 3.98 | 12.09 |
| 7 | USA | 114 | 125 | 79.5 | 144.2 | 79.28 | 7.34 | 0.04 |
| 8 | Brazil | 70 | 69 | 58.5 | 95.7 | 49.70 | 4.60 | -8.20 |
| 9 | Argentina | 36 | 28 | 17.1 | 14.8 | 18.62 | 1.72 | 110.31 |
| 10 | Mexico | 29 | 27 | 17.3 | 13.8 | 11.52 | 1.07 | 63.24 |
| 11 | Pakistan | 26 | 25 | 18.7 | 24.7 | 19.80 | 1.83 | 42.46 |
| 12 | Uruguay | 12 | 9 | 1.8 | 1.1 | - | - | - |
| 13 | Hong Kong | 16 | 16 | 7.5 | 2.3 | 1.15 | 0.11 | -49.92 |
| 14 | Australia | 14 | 8 | 5.3 | 17.6 | 8.22 | 0.76 | -24.24 |
| 15 | South Africa | 8 | 9 | 1.3 | - | - | - | - |
| 16 | Japan | - | - | - | - | 10.18 | 0.94 | 149.30 |
| 17 | Indonesia | - | - | - | - | 13.97 | 1.29 | 163.97 |
| 18 | Brother | - | - | - | - | 2.11 | 0.20 | 52.94 |
| 19 | Turkey | - | - | - | - | 1.30 | 0.12 | - |
| 20 | Paraguay | - | - | - | - | 1.33 | 0.12 | - |
| Ot | her countries / regions | - | - | - | 107.3 | 57.46 | 5.32 | -21.11 |
| | Sum | 1.628 | 1.671 | 1343.8 | 1618.2 | 1080.9 | 100 | 2.24 |

(Source: GDC)

Open Discussion Forum

開放式論壇





Smart Manufacturing & Industry 4.0

Mr Lyan Law
Head, Industry 4.0, GBA Business Development & Industrial Drone Solution,
Hong Kong Productivity Council

Personal Introduction

Head, Industry 4.0, GBA Business Development & Industrial Drone Solution

- Center Manager of Digital & Reindustrialisation Frame Hall@HKPC
- · Center Manager of Hong Kong Industrial Drone Technology

Previous industrial experiences:

- Over 20+ years project experience in IT, Digitalisation and Manufacturing Industries Business head of Industry 4.0 & Reindustrialisation in HK and GBA consultancy and advisory services.
- New business development on Industry 4.0 and enabling smart technologies such as Cyber Physical System (CPS), Industrial Drone, Al-Based applications.
- Industrial consultancy and R&D in digitalisation, IIoT, smart production line and innovation on smart technological applications development.
- Roles on Industry 4.0 strategic deployment advisor at well-known public listed companies in Hong Kong and HKSMEs.

Get ready for the Industry 4.0

Mr. Lyan Law, is certified Industry 4.0 Expert from Fraunhofer IPT Germany, and has assisted four Hong Kong enterprises in obtaining the "Industry 4.0 Smart Enterprise and Smart Manufacturing Recognition Certificate" and reaching the "Industry 4.0 Maturity - Real-Time Business and Production Information Generation Level". In addition, the Hong Kong Productivity Council established the first "i-mfg Smart Manufacturing Technology" demonstration centre in Hong Kong in 2013 and upgraded it to the "Digital@HKPC Smart Manufacturing Centre" (Hong Kong's first Industry 4.0 Demonstration Center) in 2015 to showcase the future of intelligent technology applications. "Intelligent Manufacturing" and "Industry 4.0 Intelligent Factory" are fully realized through the integration of "Industry 4.0" technology with other technologies, equipment, and information and digital systems, such as digital manufacturing technology, real-time monitoring system for process and workshop environmental data, and human-machine interface and automated production technology.





The Regional Comprehensive Economic Partnership (RCEP) and other agreement (e.g. CEPA)

Mr David Sit

Assistant Principal Economist, Research Department, Hong Kong Trade Development Council

Personal Introduction

As the head of Asian and Emerging Markets Research Team at the HKTDC Research Department, Mr. David Sit provides leadership and direction for research on Asia (excluding Greater China), the Middle East and Africa. The team closely monitors and reports on the macro environment, market trends, consumer characteristics as well as changes in trade policies and regulations, with a mission to help Hong Kong companies capture business opportunities in these markets.

Areas of Research:

- Trends and features of Hong Kong's major manufacturing and services industries
- · Market developments and trade policies in Asia (excluding Greater China), Middle East and Africa
- · Business opportunities in emerging markets in Asia (excluding Greater China), Middle East and Africa

Get ready for the RCEP

The Regional Comprehensive Economic Partnership (RCEP) is the world's largest free trade agreement (FTA) between the ten member states of the ASEAN, Australia, China, Japan, South Korea and New Zealand. It entered into force on 1 January 2022. Signatories committed further tariff concessions, simplified rules of origins and strengthened trade facilitation measures, which provide new opportunities for manufacturers. At the same time, service liberalisation, improvement in IP protection, support for e-commerce and other commitments foster trade and investment relations within the bloc and further enhance the regional economic integration. This session will explore the potential benefits of RCEP, together with other FTAs, to Hong Kong, particularly from footwear manufacturers' perspectives.



New sustainability metrics in footwear industry in APAC

Mr William Wong

Founder / Honorary Chairman of the Federation of Hong Kong Brands

Personal Introduction

William is the President and co-founder of the Global Footwear Sustainability Summit, established in 2012. It is now one of the most important Summit in the industry.

William also holds the following positions:

- Executive Member of UITIC (The International Union of Shoe Technicians)
- · Ambassador of 39th International Footwear Conference by Confederation of International Footwear Association
- Member of the Scientific Committee of ExpoRivaSchuh
- · Consultant of Shenzhen Retailers Association
- Founding Council Member of APLF Materials+ Sustainability Programme

Get ready for the New Sustainability Metrics

Different insights of the latest industry trends, sustainable solutions, opportunities, and more, incorporating these with sustainability ideals into the sustainable footwear business will be shared. It can be seen as a get-together for footwear industry stakeholders and experts, as well as pioneers in the sustainability field.





Post Covid-19 Business strategies in APAC

Dr. Michael KwongChairman, Asia Branding and Franchising Association

Personal Introduction

Dr. Kwong graduated from the University of Nottingham (UK) and Newport University (US), awarded with BA (Hon), MBA and DBA. Dr. Kwong co-authored several books including "Quantum Dialogue", "A Discourse on Legacy" and "Relationship Marketing". He was a visiting lecturer for the Executive programme of NFT in HKU SPACE, and has given talks on Metaverse and for clients including Sino Property, Bayer Pharmaceutical, Institute of Management Consultant Hong Kong, Hong Kong Institute of Human Resources Management etc.

Dr. Kwong is the Chairman of Asia Branding and Franchising Association and an independent non-executive director of Citychamp Watch and Jewellery Group Limited (256) listed in HKEX. At the same, he is also a director for several tech startups including InnoAlbator Limited and Leapflash Technology Limited. Dr. Kwong has over 20 years' experience as a corporate trainer and is currently a member of the executive council for the Hong Kong Association for the Advancement of Science and Technology, a director of the Hong Kong Economic and Trade Association, a fellow of the International Institute of Management, a Certified Management Consultant and a senior trainer, certified by the Vocational Accreditation Board, State Council, PRC.

Get ready for the huge opportunities in APAC

This is indeed an exciting time for APAC: When many regions in the world are facing issues of aging, slow growth and even bankruptcies, APAC is full of young people and energy for growth. When most regions are affected by the COVID resulting huge slowdown in their economy, countries like Indonesia still achieved significant growth during this period! Isn't it miraculous? It is time for entrepreneurs from all over the world to take a serious look into opportunities in APAC and seek opportunities before your competitors do! Welcome to the Land of dream and hope!



THE 40TH INTERNATIONAL FOOTWEAR CONFERENCE IN INDONESIA

第40屆國際鞋業會議將於印尼再見!

