China Leather Shoes Industry Report, 2012

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include the China Leather Industry Association, National Bureau of Statistics of China and China Customs etc.

Abstract

As world's largest footwear production base, China produced 4.271 billion pairs of leather shoes in 2011. In the past decade, China's output of leather shoes grew at a CAGR of 12.14%, however, the YoY increase in 2011 was merely 2%, then 10% in the first half of 2012.

There are three important leather shoe industry clusters in China, respectively, Guangdong, Zhejiang, Fujian, of which, Guangdong Province gives priority to the production of women's leather shoes, mainly gathered in Dongguan, Huizhou and other places; in Zhejiang Province, manufacturing of men's leather shoes occupies a dominant position, chiefly concentrated in Wenzhou, Wenling, Taizhou, etc.; as for Fujian Province with sports shoes as the traditional product, the leather shoe industry has witnessed rapid development in recent years, and related companies are primarily gathered in Jinjiang, Shishi, etc..

Guangdong and Zhejiang provinces are mostly doing contract manufacturing for foreign brands, oriented by export sales. Influenced by the rising RMB exchange rate, combined with the rise in labor costs, some small- and medium-sized footwear enterprises in the two provinces have collapsed or turned to Hunan, Jiangxi, Guangxi, Henan and other inland provinces, showing a downward tendency. By contrast, products of Fujian Province, dominated by domestic sales, are less exposed to the impact. In the first half of 2012, Fujian Province has accounted for 39% of China's total output of leather shoes, ranking first nationwide, followed by Guangdong and Zhejiang provinces.

Currently, the vast majority of China's well-known brand owners adopt the multi-brand strategy, involving seriation of flagship brands, acquisition or acting for other brands, represented by Belle International Holdings Limited, C.banner International Holdings Limited, Foshan Saturday Shoes Co.,Ltd, Le Saunda Holdings Limited and other listed companies; while Fuguiniao, Red Dragonfly, Yearcon, etc. are still dominated by single brand, due to the limitation of corporate scale and funds.

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As the largest footwear manufacturer in China, Belle International occupies over 40% share in Mainland Chinese women's shoes market. It owns ten proprietary brands and 15,112 retail stores, towering over other counterparts. In 2012, against the background of decelerated store expansion, it will be committed to extending product lines for women's shoes, increasing investment in men's shoes and children's shoes, and developing e-commerce platform.

Zhejiang Aokang Shoes Co Ltd, the largest men's leather shoe manufacturer in China, its Aokang brand accounted for a market share of 6.49% in the men's leather shoe market in 2011. With five proprietary brands, it chiefly renders differentiation in brand strategy, i.e. Aokang, Kanglong, Meirie's and VALLEVERDE are positioned at the high- and medium-end, while Redess at the low- and medium-end. In April 2012, Aokang Shoes was listed on Shanghai Stock Exchange; with the support of raised funds, it will enhance the construction of sales network by opening 2,490 new stores in 2012-2014 according to its plan.

Marketing channel acts as the core business of the leather shoe industry, all leather shoe companies including Belle and Aokang are under the expansion of marketing channel. In addition to the increase and layout of sales outlets, some companies have tapped into emerging channels such as online marketing platform, and competition in future leather shoe industry will extend from offline to online.

China Leather Shoe Industry Report, 2012 by ResearchInChina mainly covers the followings:

- Industrial pattern, brand pattern and regional pattern of global and China footwear industries;
- Number, gross margin, output, consumption, export volume, etc. of Chinese leather shoe manufacturers;
- Main characteristics, major brands, product prices, etc. of Chinese markets for men's and women's leather shoes
- Development of main leather shoe producing areas in China;
- Major sales channels, leather availability, etc. of leather shoes in China;
- Product brand, revenue, gross margin, sales outlets, development strategies, etc. of major Chinese leather shoe manufacturers

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