



China Leather Shoes Industry Report, 2013-2015

Jan. 2014

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 Company Reports, and National Bureau of Statistics of China etc.

Abstract

Due to slowdown in economic growth both in China and beyond in 2012-2013, leather shoes manufacturers and leather shoes retailers shouldered grave operation pressure in the wake of the slowdown in the industry.

Output & Consumption

The economic slowdown frustrates Chinese consumers who have weakening willingness to buying non-necessities such as leather shoes. As such, adverse factors, including price hike of raw materials, growing exchange rate and soaring labor cost, bring with tough business environment for entrepreneurs who, in turn, hold pessimistic attitude towards future development. In 2012-2013, both the output and consumption of China leather shoes industry witnessed a decline, with the output growth rates down to 5.29% and 7.45%, respectively, while the consumption growth rates down to 9.22% and 8.42%, a level well below the 2010 boom albeit its outperforming the 2011 level. Thus far, the confidence of both consumers and entrepreneurs has yet substantively changed for better. Given this, it is expected that the growth rates for both the output and consumption in China leather shoes industry will sustain slight decline tendency between 2014 and 2015.

Leather Shoes Production Clusters in China in 2013



Source: National Bureau of Statistics of China; ResearchInChina

Export

Anti-dumping investigations launched by many countries on made-in-China leather shoes are very frequent for a long time, which forces Chinese industrial players to bear higher import tariff and anti-dumping duty. In Nov.2012, Zhejiang Aokang Shoes won a lawsuit in an anti-dumping case, which cheered up Chinese leather shoes makers' export confidence to some extent. According to the estimate, the export volume of made-in-China leather shoes will realize slight growth in upcoming two years.

Industrial Cluster

The production of leather shoes in China still concentrates in Fujian, Zhejiang and Guangdong provinces, the combined output of which accounted for 69.62% of China's total in 2013. As a result of the growing wages and decreasing labor resources, leather shoes enterprises in the three provinces are encountered with higher operation pressure. In the meanwhile, some leather shoes producers are transferring their production bases to West and Central China where feature abundant labor resources and lower pay. It is projected that the leather shoes output of these three provinces will occupy a decreased proportion of the total in China, and that the output in Hunan, Chongqing and Sichuan will see a rise.

Marketing Channel

Along with the ceaseless improvement and development of e-commerce, China online shopping industry has long been maintaining booming development. In 2013, the market size of China online shopping industry soared by 40% year-on-year to roughly RMB1.82424 trillion. Many leading leather shoes enterprises including Belle, Aokang, Red Dragonfly, Yearcon and Mulinsen have jumped on e-commerce business by opening up flagship stores or franchised stores through the platform of Tmall, JD and other well-known B2C websites.

Leading industrial players continue to give priority to expansion or renovation of franchised stores. For instance, Belle International is keen on expanding retail outlets, with the number of self-run shoes retail outlets increasing by 442 on Chinese Mainland in the first half of 2013. Another example is Zhejiang Aokang Shoes, which, on the contrary, puts sub-brands together in a store with larger coverage and more staff for sale or sort management.

Copyright 2012ResearchInChina

The report highlights:

- ※ Industrial Pattern, Brand Pattern, Regional Pattern of Global and China Shoemaking Industry;
- ※ Number, Gross Margin, Output, Consumption, Export Volume and Outlook of Chinese Leather Shoes Enterprises;
- ※ Market Characteristics, Main Brands, Prices, Market Occupancy of Men's Leather Shoes and Women's Leather Shoes Market;
- ※ Status Quo and Prediction of Main Leather Shoes Production Regions in China;
- ※ Main Marketing Channels of Made-in-China Leather Shoes, and Supply of Leather;
- ※ Brands, Revenue, Gross Margin, Distribution of Sales Outlet, and Development Strategy of Main Leather Shoes Manufacturers in China

1. Leather Shoes Industry

1.1 Overview of Leather Shoes

1.1.1 Definition

1.1.2 Dermal Mark

1.1.3 Gross Margin

1.2 Global Pattern

1.2.1 Industry Pattern

1.2.2 Brand Pattern

1.3 China Pattern

1.3.1 Industry Pattern

1.3.2 Brand Pattern

2. China Leather Shoes Market

2.1 Output

2.2 Consumption

2.2.1 Total Consumption

2.2.2 Per Capita Consumption

2.3 Exports

2.4 Market Segment

2.4.1 Women's Shoes Market

2.4.2 Men's Shoes Market

3. Regional Market

3.1 Regional Pattern

3.2 Development in Fujian

3.3 Development in Zhejiang

3.4 Development in Guangdong

4. Marketing Channel

4.1 Product Price

4.2 Brand Strategy

4.3 Marketing Channel

4.4 Network Marketing

4.4.1 Network Marketing Scale

4.4.2 Network Marketing Brand Ranking

5. Leather Market

5.1 Classification of Leather

5.2 Industry Status

5.3 Output and Import

5.4 Competitive Landscape

5.5 Development Tendency

6. Key Enterprises

6.1 Belle International Holdings Limited

6.1.1 Profile

6.1.2 Business Performance

6.1.3 Revenue Structure

6.1.4 Gross Margin

6.1.5 Distribution Network

6.1.6 New Business Development Layout

6.2 DAPHNE International Holdings Limited

6.2.1 Profile

6.2.2 Business Performance

6.2.3 Revenue Structure

6.2.4 Gross Margin

6.2.5 Distribution Network

6.3 ZheJiang AoKang Shoes Co., Ltd

6.4 C. banner International Holdings Limited

6.5 Fuguiniao Co., Ltd.

6.6 Foshan Saturday Shoes Co.,Ltd.

6.7 Le Saunda Holdings Limited

6.8 Walker Group Holdings Ltd.

6.9 Qingdao Hengda Co., Ltd

6.10 YEARCON CO., LTD

6.11 Red Dragonfly Footwear Co., Ltd.

6.12 Kangnai Group Co. Ltd

6.13 Jinhou Group

6.14 Harson Trading (China) Co., Ltd.

6.15 Spider King Group Co., Ltd

6.16 Jiangsu Senda Group Co.,Ltd.

7. Summary

7.1 Leather Shoes Industry Development Tendency

7.1.1 Negative Factor

7.1.2 Positive Factor

7.1.3 Development Tendency Summary

7.2 Comparison of Listed Companies

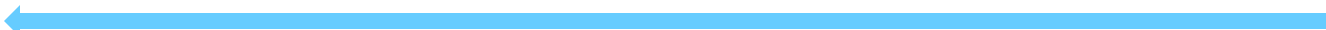
7.2.1 Revenue

7.2.2 Net Income

7.2.3 Gross Margin and Net Profit Margin

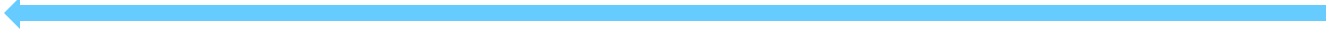
7.2.4 Retail Stores

- 
- Leather Shoes Brands Being Selected as the “Chinese Leading Dermis Shoes King”, 2012
 - Number of Chinese Leather Shoes Makers above Designated Scale, 2011-2013
 - Revenue and Gross Margin of Chinese Leather Shoes Makers above Designated Scale, 2011-2013
 - Distribution of the World’s Leading Footwear Producing Countries
 - Comparison among the World’s Major Footwear Producing Countries
 - Migration Process of Global Footwear Clusters
 - Famous Footwear Brands Worldwide
 - Three Major Footwear Clusters in China
 - Market Positioning and Price of Chinese Footwear Products
 - Leathers Shoes Output in China, 2004-2015
 - Leather Shoes Consumption and Growth Rate in China, 2004-2015
 - Leather Shoes Sales in Domestic Market of China, 2004-2015 (%)
 - Per Capita Consumption of Leather Shoes in China, 2004-2015
 - Leather Shoes Export Volume in China, 2004-2015
 - Leather Shoes Export Volume of China in Total Output, 2004-2015
 - Average Export Unit Price of Leather Shoes in China, 2004-2015
 - Market Occupancy of Leading Leather Shoes Enterprises in China, 2012
 - China Footwear Market Structure, 2012
 - Chinese Women's Shoes Brand Awareness –No.1 Brand Awareness without Hint
 - Market Occupancy of Women’s Leather Shoes in China, 2012
 - Style and Positioning of Main Women’s Leather Shoes Brands in China
 - Market Occupancy of Men’S Leather Shoes in China, 2012
 - Main Men’s Shoes Brands in China
 - Leather Shoes Output in China by Region, 2012-2013
 - Leather Shoes Output in Fujian, 2004-2015


- 
- Minimum Wage Standard in Fujian, 2005-2013
 - Leather Shoes Output in Zhejiang, 2004-2015
 - Minimum Wage Standard in Zhejiang, 2005-2013
 - Leather Shoes Output in Guangdong, 2004-2015
 - Minimum Wage Standard in Guangdong, 2005-2013
 - Leather Shoes Consumption in China by Grade, 2007/2012/2015
 - Multi-brand Situation of Well-known Footwear Enterprises in China
 - Retail Channel Distribution of Footwear in China, 2000, 2006, 2011 and 2013
 - China Online Shopping Market Size by Quarter, 2012-2013
 - China Online Shopping Market Size, 2007-2015
 - Proportion of B2C in Online Shopping Market in China, 2012-2013
 - Market Occupancy of China B2C Platform in China, 2013Q3
 - Turnover of Tmall on Nov.11, 2009-2013
 - Transaction Volume of Men's and Women's Shoes on Tmall on Nov.11, 2013
 - TOP10 Women's Shoes Brands of Tmall on Nov.11, 2013
 - Average Selling Price and Per Customer Transaction of Top 10 Women's Shoes Brands on Tmall on Nov.11, 2013
 - TOP10 Men's Shoes Brands of Tmall on Nov.11, 2013
 - Average Selling Price and Per Customer Transaction of Top 10 Men's Shoes Brands on Tmall on Nov.11, 2013
 - Classification of Leather
 - Business Index of China Leather Market, 2013
 - Price Index of China Leather Market, 2013
 - Rise in Price of Leather Products by Variety, Nov.2013
 - Average Price of First-Layer Cow Leather in China, 2010-2015
 - China Raw Hide Output, 2004-2015
 - Import Volume of Raw Hide and Wet Blue Leather in China, 2009-2015

- 
- Average Import Unit Price of Raw Hide and Wet Blue Leather in China, 2009-2015
 - Major Leather-making Enterprises in China
 - Revenue and YoY Growth Rate of Belle International, 2008-2015
 - Net Income and YoY Growth Rate of Belle International, 2008-2015
 - Revenue Structure of Belle International by Product, 2008-2013
 - Revenue Structure of Belle International by Region, 2008-2013
 - Gross Margin and YoY Growth Rate of Belle International, 2008-2013
 - Gross Margin of Belle International, 2008-2013
 - Number of Self-Run Retail Outlets under Belle International in China, 2008-2013
 - Distribution of Self-Run Retail Outlets under Belle International on Chinese Mainland by Province/Municipality, 2013H1
 - Revenue and YoY Growth Rate of Daphne International, 2008-2015
 - Net Income and YoY Growth Rate of Daphne International, 2008-2015
 - Revenue Structure of Daphne International by Business, 2008-2012
 - Gross Margin and YoY Growth Rate of Daphne International, 2008-2013
 - Gross Margin of Daphne International, 2008-2013
 - Number of Retail Outlets of Daphne International in China, 2008-2013
 - Distribution of Outlets with Core Brands under Daphne International by Layer of Cities, 2008-2013
 - Revenue and YoY Growth Rate of Zhejiang Aokang Shoes, 2008-2015
 - Net Income and YoY Growth Rate of Zhejiang Aokang Shoes, 2008-2015
 - Revenue Structure of Zhejiang Aokang Shoes by Product, 2009-2013
 - Revenue Structure of Zhejiang Aokang Shoes by Region, 2009-2013
 - Gross Margin of Zhejiang Aokang Shoes by Product, 2009-2013
 - Gross Margin of Zhejiang Aokang Shoes by Region, 2009-2013
 - Number of Direct-Sale Stores and Franchised Stores of Zhejiang Aokang Shoes, 2008-2013
 - Number of Sales Outlets under Zhejiang Aokang Shoes in China by Province/Municipality, 2011

- 
- Global Distribution of Sales Network of Zhejiang Aokang Shoes, 2012
 - Orientation and Marketing Channels of Five Leading Brands under Zhejiang Aokang Shoes
 - Revenue and YoY Growth Rate of C.Banner, 2008-2015
 - Net Income and YoY Growth Rate of C.Banner, 2008-2015
 - Revenue Structure of C.Banner by Region, 2008-2012
 - Net Income and YoY Growth Rate of C.Banner, 2008-2013
 - Gross Margin of C.Banner, 2008-2013
 - Number of Direct-Sale Stores and Franchised Stores of C.Banner, 2010-2013
 - Distribution of Outlets of C.Banner by Region, 2013H1
 - Production Bases and R&D Centers of Fuguiniao
 - Revenue and YoY Growth Rate of Fuguiniao, 2010-2015
 - Net Income and YoY Growth Rate of Fuguiniao, 2010-2015
 - Revenue Structure of Fuguiniao by Product, 2010-2013
 - Revenue Structure of Fuguiniao by Brand, 2010-2013
 - Revenue Structure of Fuguiniao by Marketing Channel, 2010-2013
 - Revenue Structure of Fuguiniao by Marketing Region, 2010-2013
 - Gross Margin and YoY Growth Rate of Fuguiniao, 2010-2013
 - Gross Margin of Fuguiniao, 2010-2013
 - Number of Retail Outlets of Fuguiniao by Channel, 2010-2013
 - Number of Retail Outlets of Fuguiniao by Product, 2010-2013
 - Number of Retail Outlets and Distributors of Fuguiniao by Region, 2010-2013
 - Positioning of Three Leading Brands under Fuguiniao
 - Revenue and YoY Growth Rate of SATURDAY SHOES, 2008-2015
 - Net Income and YoY Growth Rate of SATURDAY SHOES, 2008-2015
 - Revenue Structure of SATURDAY SHOES by Product, 2008-2013

- 
- Revenue Structure of SATURDAY SHOES by Region, 2008-2013
 - Gross Margin of SATURDAY SHOES by Product, 2009-2013
 - Gross Margin of SATURDAY SHOES by Region, 2009-2013
 - Number of Retail Outlets of SATURDAY SHOES and YoY Growth Rate, 2008-2013
 - Revenue and YoY Growth Rate of Le Saunda, FY2008-FY2014
 - Net Income and YoY Growth Rate of Le Saunda, FY2008-FY2014
 - Revenue Structure of Le Saunda by Product, FY2009-FY2014
 - Revenue Structure of Le Saunda by Region, FY2008-FY2014
 - Gross Margin and YoY Growth Rate of Le Saunda, FY2008-FY2014
 - Gross Margin of Le Saunda, FY2008-FY2014
 - Number of Retail Outlets Le Saunda and YoY Growth Rate, FY2008-FY2014
 - Number of Self-Run and Franchised Stores under Le Saunda by Region, FY2011-FY2014
 - Revenue and YoY Growth Rate of WALKER GROUP, FY2008-FY2015
 - Net Income and YoY Growth Rate of WALKER GROUP, FY2008-FY2014
 - Revenue Structure of WALKER GROUP by Region, FY2008-FY2014
 - Gross Profit and YoY Growth Rate of WALKER GROUP, FY2008-FY2014
 - Gross Margin of WALKER GROUP, FY2008-FY2014
 - Growth Rate for Export of Made-In-China Leather Shoes, 2008-2015
 - Proportion of Leather Shoes Output of Fujian, Zhejiang and Guangdong in China's Total, 2008-2015
 - China Online Shopping Market Size and Growth Rate, 2008-2015
 - Revenue of Listed Industrial Players in China, 2008-2013
 - Growth Rate for Revenue of Listed Industrial Players in China, 2009-2013
 - Net Income of Listed Industrial Players in China, 2008-2013
 - Growth Rate for Net Income of Listed Industrial Players in China, 2009-2013
 - Gross Margin of Listed Industrial Players in China, 2008-2013

Selected Charts

- 
- Net Income of Listed Industrial Players in China, 2008-2013
 - Number of Retail Outlets under Listed Industrial Players in China, 2008-2013

You can place your order in the following alternative ways:

1. Order online at www.researchinchina.com
2. Fax order sheet to us at fax number: +86 10 82601570
3. Email your order to: report@researchinchina.com
4. Phone us at +86 10 82600828/ 82601561

Party A:			
Name:			
Address:			
Contact Person:		Tel	
E-mail:		Fax	

Party B:			
Name:	Beijing Waterwood Technologies Co., Ltd (ResearchInChina)		
Address:	Room 502, Block 3, Tower C, Changyuan Tiandi Building, No. 18, Suzhou Street, Haidian District, Beijing, China 100080		
Contact Person:	Liao Yan	Phone:	86-10-82600828
E-mail:	report@researchinchina.com	Fax:	86-10-82601570
Bank details:	Beneficial Name: Beijing Waterwood Technologies Co., Ltd Bank Name: Bank of Communications, Beijing Branch Bank Address: NO.1 jinxiyuan shijicheng, Landianchang, Haidian District, Beijing Bank Account No #: 110060668012015061217 Routing No #: 332906 Bank SWIFT Code: COMMCNSHBJG		

Title	Format	Cost
Total		

Choose type of format

PDF (Single user license)2,300 USD
 Hard copy 2,400 USD
 PDF (Enterprisewide license)..... 3,500 USD

※ Reports will be dispatched immediately once full payment has been received.
 Payment may be made by wire transfer or credit card via PayPal.

About ResearchInChina

ResearchInChina (www.researchinchina.com) is a leading independent provider of China business intelligence. Our research is designed to meet the diverse planning and information needs of businesses, institutions, and professional investors worldwide. Our services are used in a variety of ways, including strategic planning, product and sales forecasting, risk and sensitivity management, and as investment research.

Our Major Activities

- ❑ *Multi-users market reports*
- ❑ *Database-RICDB*
- ❑ *Custom Research*
- ❑ *Company Search*

RICDB (<http://www.researchinchina.com/data/database.html>), is a visible financial data base presented by map and graph covering global and China macroeconomic data, industry data, and company data. It has included nearly 500,000 indices (based on time series), and is continuing to update and increase. The most significant feature of this base is that the vast majority of indices (about 400,000) can be displayed in map.

After purchase of our report, you will be automatically granted to enjoy 2 weeks trial service of RICDB for free.

After trial, you can decide to become our formal member or not. We will try our best to meet your demand. For more information, please find at www.researchinchina.com

For any problems, please contact our service team at: