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Vietnam Leather and Footwear Comprehensive Report Q3/2016

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Abstracts

The global tanning industry is characterized by small and medium – sized family businesses, mainly concentrating in South Korea, Taiwan, China and Indonesia. However, many enterprises are now facing the lack of materials and have to import large amounts of leather materials.

In the past years, the growth rate of global leather consumption is contributed mainly by cow leather, but the increase was not significant, while consuming sheep and goat leather has continuously dropped. In contrast with the decline in consumption in North America and Europe, the demand for rawhide in developing countries tends to rise sharply. The Far East continues to be the largest net importer of cowhide due to the lifting demand for leather products in this region. Meanwhile, Latin America is the biggest cowhide exporter.

The global footwear production reached 24.3 billion pairs in 2014. Contributing the most in this output is China and India, which are two footwear factories of the world due to cheap production cost and high population growth. Asia contributed 53% in the global footwear consumption in 2014, as this is populous area where many emerging markets concentrate.

Footwear production is a key industry of Vietnam. The domestic tanning sector is still facing issues in terms of materials, environment, technology and human resources. Production is still under export processing form with the material supplied from abroad and designed assigned by foreign customers. Therefore, even though the footwear export value is high, reachingg over US$12bn in 2014 but the added value for each item is low. The localization ratio in the leather and footwear sector is merely 50%, which is not enough for satisfying fully the rules of origin in trade agreements that Vietnam has

signed.

Being beneficial from the yuan devaluation of China, the footwear production growth rate of Vietnam reached 12% in 2015, after many famous shoe brands switched their orders from China to Vietnam to avoid invesment risks. The major export partners of Vietnam include the US, EU and Japan.

The majority of typical enterprises in the leather and footwear industry of Vietnam is foreign invested ones. Domestic businesses account for very small shares, mainly producing for local demand and processing for orders from abroad. Thai Binh Shoes is the only Vietnamese brand having the revenue of over VND2,000bn, becoming the partner for many famous footwear brands from the US and Europe.

The “Vietnam Leather and Footwear Industry Report Q2/2016” elaborated by Vietnam Industry Research and Consultant Jsc. (VIRAC) draws an all-around picture about the leather and footwear sector in Vietnam, brings to readers a clear insight about the historical and current developingg trends of the industry by categories: materials, production – consumptiom, export – import, price movement and distribution system. Specifically, the report analyzes the economic situation in general and the leather and footwear industry in particular through the latest data updated to Q2/2016, beside the forecasts about the output, scale and expanding trend of the sector in the future. The report also mentions about related products such as leather shoes, bags, suitcase, hat, gloves, etc. It also give detail information about large businesses in the industry such as Pou Yuen, Chang Sin or Thai Binh Shoes through analyzing their financial statements, technology status and market shares in order to position and identify the level of competitiveness among firms in the market.

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