

Vietnam Leather and Footwear Standard Report

Q2/2019

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Abstracts

VIETNAM LEATHER AND FOOTWEAR INDUSTRY

The world tanning industry is characterized by small or medium-sized family businesses. According to the World Footwear, the total production of global footwear in 2017 increased by 2.2% compared to 2016. The footwear consumption continuously recovered in the last 2 years, the consumption value in 2018 was nearly equal to 2014 and achieved the growth rate of 3.7% over the same period last year.

In Vietnam, the total output of raw leather supplied to the tanning industry is estimated at 220,000- 250,000 tons. The compound annual growth rate for the period of 2012 - 2016 reached 14%, in 2018 the leather production reached 75.1 million m², rising 7.4% over the same period in 2017. Continuing the growth momentum from the previous year with the positive impact from CPTPP, the footwear production in Q1/2019 reached 432.1 million pairs, of which leather shoes and sandals increased by 11.7% compared to the same period in 2018.

Vietnam ranks among the world's four largest footwear producers in terms of quantity. In the first month of 2019, Vietnam's footwear export turnover increased by 14.1% over the same period of 2018, in which FDI enterprises accounted for 78.2% of total export value. The export value of the footwear industry is forecasted to increase from 8-15% in the period of 2018 to 2020, reaching over 19.3 billion USD.

The value of shoe imports continuously increased over the years with CAGR in the period of 2012-2018 reaching 25.5%. . However, in fact, footwear exporting countries show that the export value of footwear into Vietnam was about 4 times higher than the statistics. Thus, a significant amount of footwear consumed in Vietnam was introduced

through smuggling and quota.

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