

**Intesco
Research
Group**

FOOTWEAR AND FOOTWEAR MARKET



MOSCOW 2014

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Subject of research:

FOOTWEAR MARKET

Goal of research:

EVALUATION OF THE MARKET AND FORECAST OF ITS DEVELOPMENT FOR 2014-2016

Regions of research:

RUSSIA

REGIONS OF RUSSIA

Main blocks of research:

GENERAL ECONOMIC SITUATION IN RUSSIA

SUBJECT OF RESEARCH

WORLD FOOTWEAR MARKET

ANALYSIS OF LEATHER FOOTWEAR RETAIL SALES IN RUSSIA

VOLUME OF RUSSIAN FOOTWEAR MARKET

RUSSIAN FOOTWEAR MARKET SEGMENTATION

TRENDS ON THE RUSSIAN FOOTWEAR MARKET

FACTORS INFLUENCING FOOTWEAR MARKET

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FRANCHISING ON RUSSIAN FOOTWEAR MARKET

ANALYSIS OF CONSUMER PREFERENCES ON FOOTWEAR MARKET

PROFILES OF THE LARGEST ENTERPRISES BY FOOTWEAR PRODUCTION

FORECAST OF RUSSIAN FOOTWEAR MARKET DEVELOPMENT FOR 2014-2016

The largest Russian companies with profiles:

«MUYA PRODUCTION» LLC

«UNICHEL» FOOTWEAR COMPANY» JSC
«TRADE AND INDUSTRIAL COMPANY «TSZISIN» LLC
«RALF RINGER» JSC
«FORIO» LLC

Production volumes, financial activities data, balance sheets, profit and loss statements, cash-flow statements, the subsidiaries and other data about these main companies were presented.

Information sources used:

Federal State Statistics Service
Ministry of economic development of the Russian Federation
Federal Customs Service
Federal Tax Service
International bases of statistics
Field expert evaluations
Retail sale reports
Materials of the field's main players
Field print and electronic publications

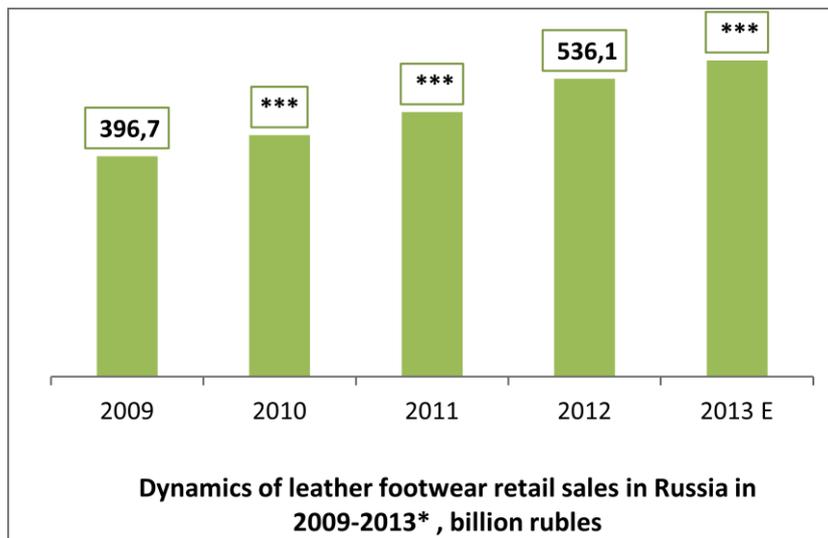
The research contains 57 schedules, 57 diagrams, 69 tables.

EXTRACTS FROM RESEARCH

CHAPTER 4

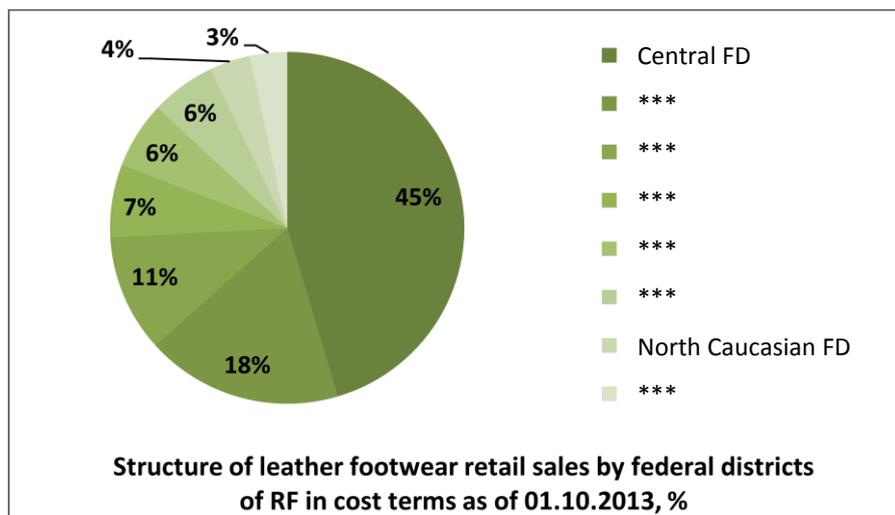
ANALYSIS OF LEATHER FOOTWEAR RETAIL SALES IN RUSSIA

In 2009-2013 a positive dynamics of leather footwear retail sales was marked. Thus, if in 2009 volume of retail sales was equal to 396,7 billion rubles, then in 2012 – 536,1 billion rubles, that was 35% more. In 2013 the growth slowed down and by October 1, 2013 sales



volume was equal to *** billion rubles (the growth ***% to the same surveyed period of 2012). In general as of 2013 retail sales volume was estimated at 568,9 billion rubles.

Structure of leather footwear retail sales by federal districts was uneven. Thus, Central FD had ***% of all retail sales of this product in cost terms. *** FD ranked second with 18%. The

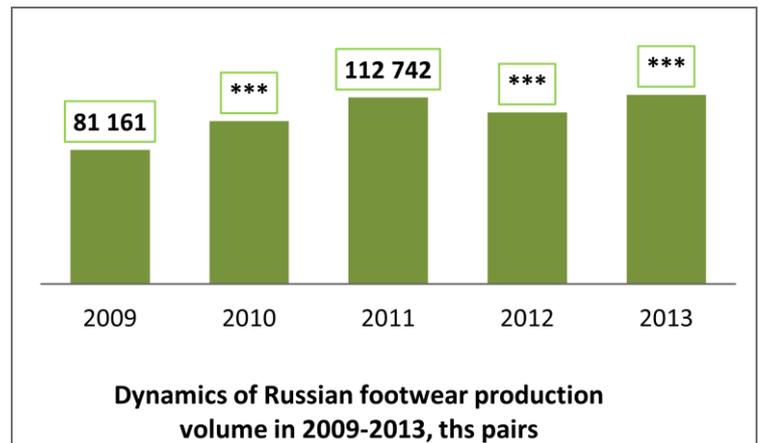


least volume belonged to Far Eastern FD and North Caucasian FD – 3% and 4% respectively.

CHAPTER 10

FOOTWEAR PRODUCTION

Footwear production in Russia in 2009-2013 was characterized by a positive dynamics and by the end of the period reached the level of *** mln pairs. The growth of production in 2010 was especially important – by 21%, to the parameter of 98,5 mln pairs. The growth was due to a range of protective measures from the government of RF, in particular introduction of the imported footwear duty and decrease of the tariff for supply of footwear components. In 2012 the decrease was marked – by 8% compared to the previous period.



Russian footwear production is characterized by seasonality. Minimum production volumes are marked in the beginning of the year and in mid-summer. Footwear production volumes are relatively high in inter-season – in spring and autumn. Thus, in January 2010 5 978,6 ths pairs were produced and then parameter increased significantly and in April, and then



parameter increased considerably, and in April – about 9 252,6 ths pairs. In January 2013 7 252,7 ths pairs were produced, in March – 10 459,6 ths pairs. The maximal production level, which was marked in the third month of the year, in 2013 was marked in September – *** ths pairs.

CHAPTER 13

VOLUME OF TEXTILE FOOTWEAR IMPORT

Volumes of Russian textile footwear import in physical terms in 2007-2013 were characterized by a positive dynamics. In 2013 Russian import of this type of footwear reached the maximum of *** tons, rate of growth – 8%.

The minimum was marked in the beginning of the surveyed period – 2007 – 14 484 tons. In the crisis 2009 parameters were also low – 14 708 tons, then in 2010 the growth amounted to 70%.



The undisputed leader of textile footwear import is China. In 2012 CDR imported *** tons (the maximum), during first 10 months of 2013 – *** tons. Vietnam (***) tons), Indonesia (***) tons) and Ukraine (841 tons) followed China.

Table. Volumes of Russian textile footwear import by supplying countries in 2007-2013 (actual for 01.11.2013), tons

	2007	2008	2009	2010	2011	2012	2013 January- October
All countries of the world	14 484	16 430	***	***	***	***	***
China	11 771	***	***	***	27 018	***	***
Vietnam	571	***	843	***	***	***	***
***	79	***	281	349	583	923	986
Ukraine	430	***	***	641	816	1 016	841
***	15	1	11	2	5	8	454
Italy	***	261	***	***	***	***	***
***	137	112	99	171	242	315	293

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22. FORECAST OF RUSSIAN FOOTWEAR MARKET DEVELOPMENT FOR 2014-2016

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