

Country Report of Chinese Footwear Industry 2021 and 2022



China Leather Industry Association



◆ 1 Performance in 2021

◆ 2 Performance in 2022

◆1 Performance in 2021

✓ Key indicators in 2021

✓ **Production:** 13.5 billion pairs est.

Sales revenue (generated by 4,175 enterprise above designated size):
RMB 655.3 billion

✓ **Exports:** 8.73billion pairs, \$47.9 billion

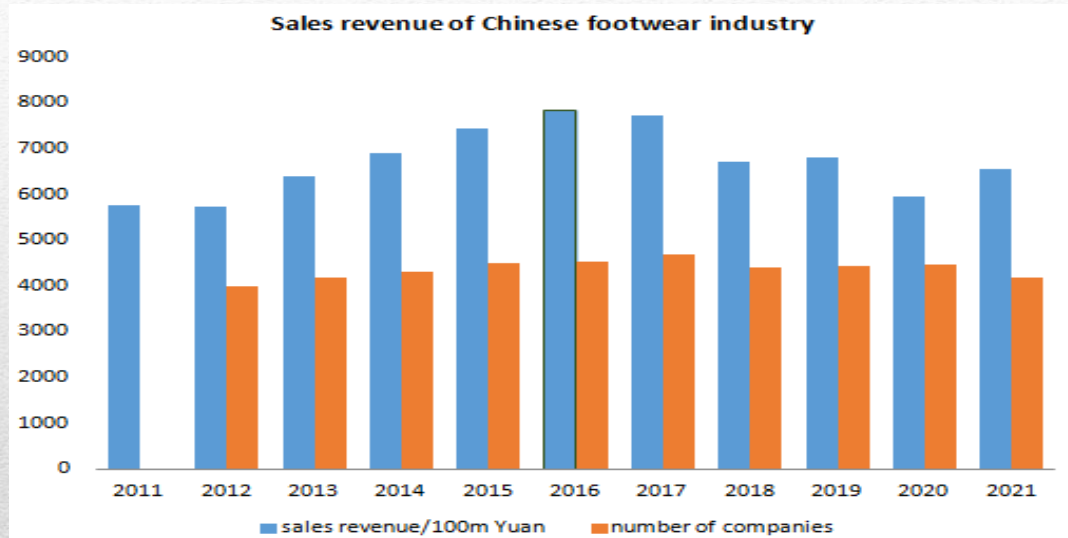
✓ **Imports:** 210 million pairs, \$6.1 billion

✓ **Consumption:** 4.1 billion pairs, RMB 500 billion est.

➤ The industry has roughly recovered to the situation before the global pandemic.

◆ 1 Performance in 2021

➤ 1.1 Sales revenue

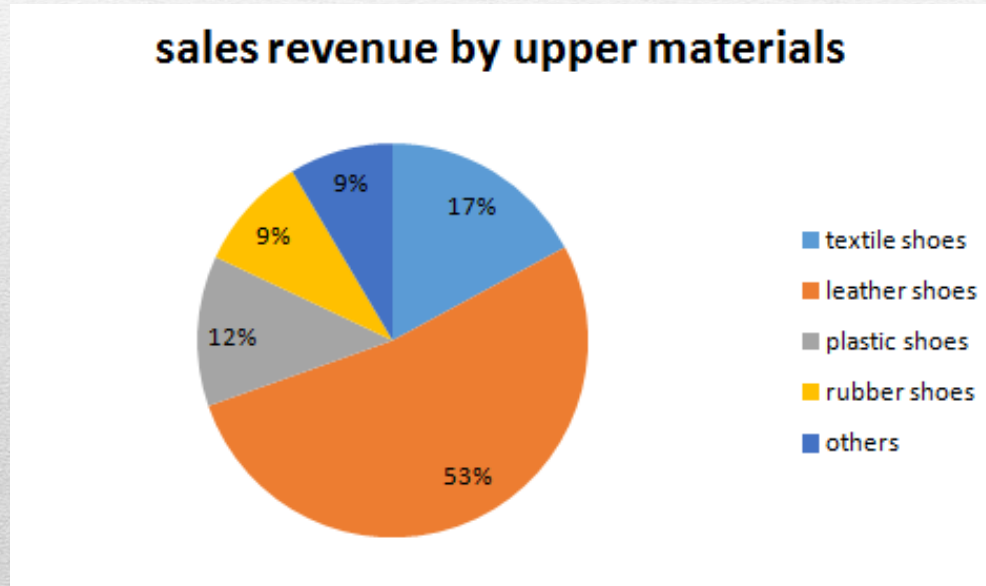


- ✓ Sales revenue of 4,175 enterprise above designated size, i.e., above 20m Yuan, reached 655.3 billion Yuan in 2021, up by 8.9% compared with 2020.
 - ✓ The number of enterprise above designated size slightly declined in 2021.
-

◆1 Performance in 2021

➤1.1 Sales revenue

✓Leather shoes accounts for more than half of the total revenue, followed by plastic, rubber, and textile shoes.



◆ Performance in 2021

➤ 1.2 Export

- ✓ Exports totaled 8.73 billion pairs and USD 47.9 billion in 2021, increased by 18.1% and 35.3% year-on-year respectively.
- ✓ Considering the sharp decline in 2020, the two-year average growth rate in value was only 3.3%.

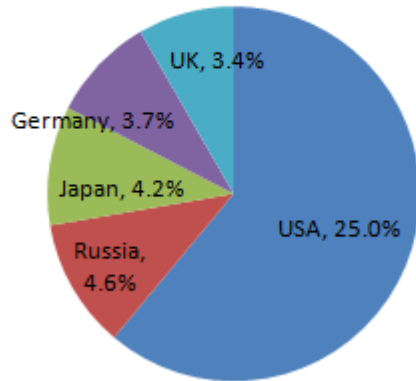


◆ Performance in 2021

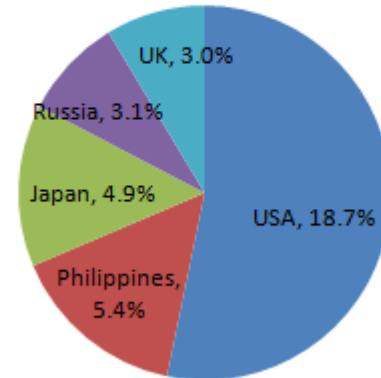
➤ 1.2 Export

✓ The top three export destinations are US, Russia and Japan in terms of value. While the Philippines ranked 2nd in terms of volume.

top 5 export countries (value)



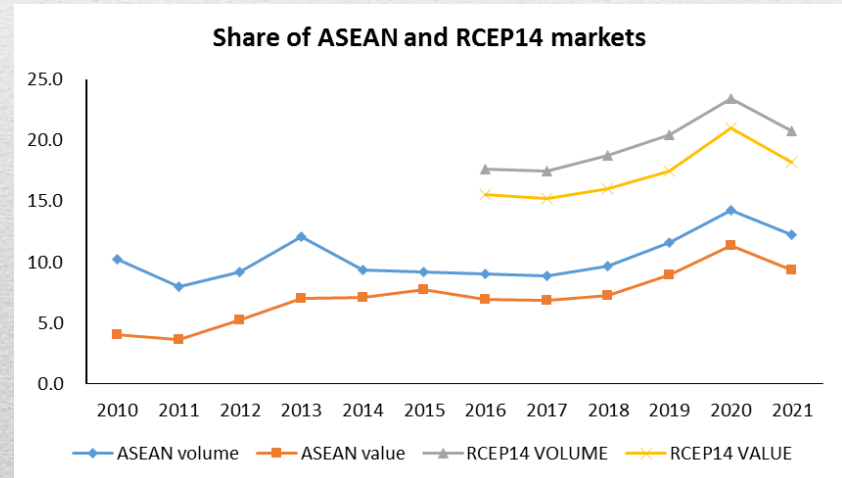
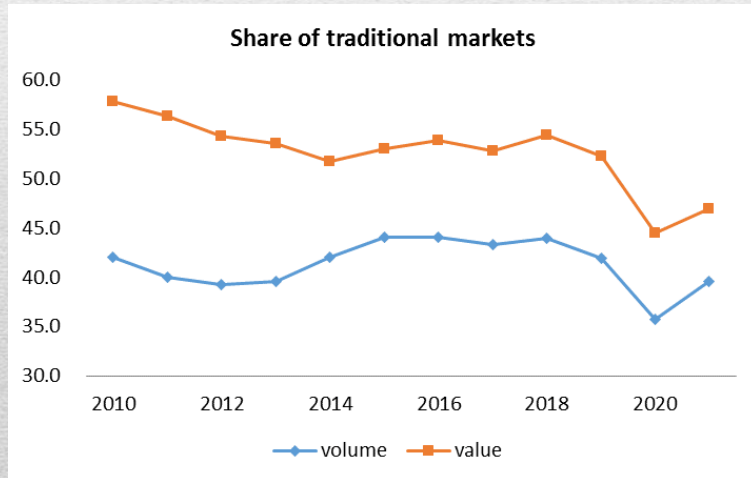
top 5 export countries (volume)



◆ Performance in 2021

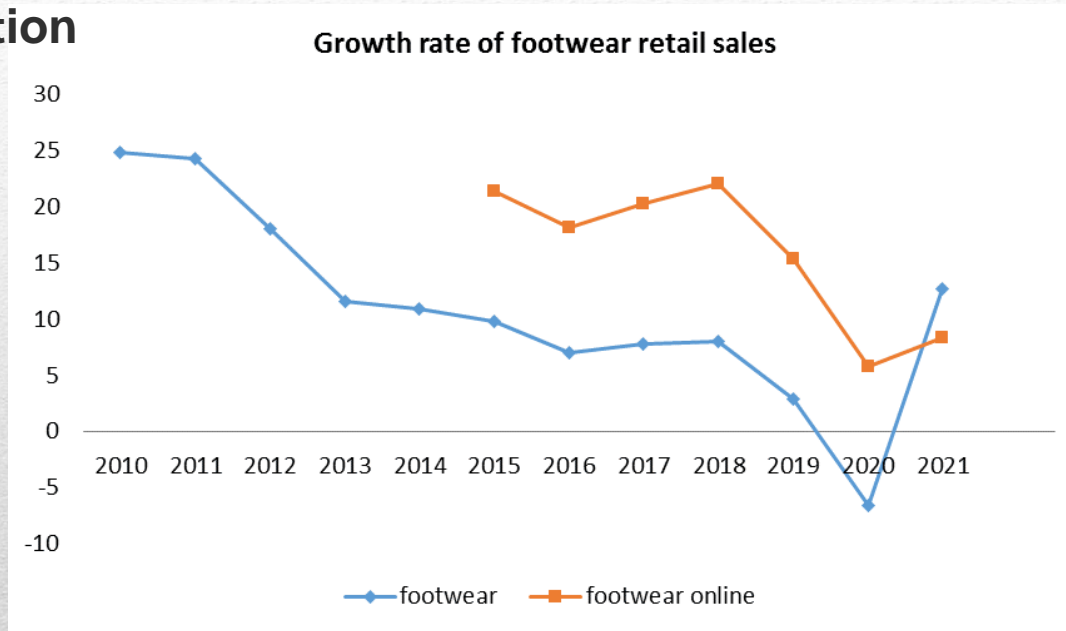
➤ 1.2 Export of footwear

Since 2009 the share of the three main destinations (US, EU and Japan) has been shrinking, while the ASEAN countries have been becoming more and more important.



◆ Performance in 2021

➤ 1.5 Consumption



➤ Growth rate of domestic retail sales for footwear increased by 12.7 percent over 2021, with the two-year rate for 2020 and 2021 was only 1.2% according to NBSC.

➤ Online sales still outperform the total retail sales in growth rate.

◆2 Performance in 2022

➤ Sharp contrast between export and import:

The exports increased by 12.4% in volume and 30.4% in value in Jan to Aug 2022, compared with the same period last year.

The imports decreased by 16.9% in volume and 7.5% in value from Jan to Aug 2022.

➤ The domestic consumption was far below expectation, with the retail sales declined by 4.4% and online sales increased by 4% in the first 8 months.

Jan to Aug growth rate	VOLUME	VALUE
Exports	12.4%	30.4%
Imports	-16.9%	-7.5%

◆ 2 Performance in 2022

Keywords:
men's shoes online

In August, the online retail sales of men's shoes on 16 e-commerce platform including JD and Tmall reached 3.2 billion yuan, a year-on-year decrease of 1.21 percent according to OtoO.

男鞋 2022-08~2022-08天猫... Top20品牌交易规模

排名	品牌名称	零售额 (元)	零售额占比	零售量 (件)	零售量占比
1	回力/WARRIOR	178149389.3	5.56%	2443005	8.18%
2	木林森/MULINSEN	57141242.18	1.78%	368316	1.23%
3	爱步/ECCO	53718825.85	1.68%	56460	0.19%
4	卡帝乐鳄鱼/CARTELO	39400598.49	1.23%	303197	1.02%
5	花花公子/PLAYBOY	36487570.88	1.14%	217669	0.73%
6	百丽/BELLE	35353833.87	1.1%	91745	0.31%
7	吉普/JEEP	34479990.71	1.08%	115536	0.39%
8	红蜻蜓/REDDRAGONFLY	30091294.74	0.94%	140182	0.47%
9	意尔康/YEARCON	29279214.3	0.91%	192884	0.65%
10	奥康/AOKANG	26867783.56	0.84%	113846	0.38%
11	阿斯顿名爵/JAZZ	24396698.6	0.76%	33843	0.11%
12	骆驼/CAMEL	23840918.07	0.74%	90277	0.3%
13	足力健	22608220.04	0.71%	145101	0.49%
14	SKECHERS	20689066.17	0.65%	67488	0.23%
15	老人头/LAORENTOU	19204660.65	0.6%	97045	0.33%
16	金利来/GOLDLION	15929672.01	0.5%	26161	0.09%
17	黑觅	15497595.96	0.48%	249485	0.84%
18	沙驰/SATCHI	15172468.64	0.47%	23323	0.08%
19	海澜之家/HLA	14543912.13	0.45%	58065	0.19%
20	帕尼霖	13871389.5	0.43%	161933	0.54%

◆2 Performance in 2022

Keywords:
women's shoes online

In August, the online retail sales of women's shoes on 16 e-commerce platform including JD and Tmall reached 6.8 billion yuan, a year-on-year increase of 2.35 percent according to OtoO.

女鞋 2022-08~2022-08天猫... Top20品牌交易规模

排名	品牌名称	零售额 (元)	零售额占比	零售量 (件)	零售量占比
1	回力/WARRIOR	225266751	3.27%	2826939	5.26%
2	达芙妮/DAPHNE	118789400.2	1.73%	693751	1.29%
3	百丽/BELLE	98873167.3	1.44%	294968	0.55%
4	匡威/CONVERSE	84924900.04	1.23%	332720	0.62%
5	卓诗尼/JOSINY	51807338.82	0.75%	327335	0.61%
6	思加图/STACCATO	49417758.9	0.72%	101926	0.19%
7	他她/TATA	47891133.03	0.7%	136808	0.25%
8	SKECHERS	40275455.93	0.58%	134834	0.25%
9	美职棒/MLB	35166142.38	0.51%	103238	0.19%
10	阿迪达斯/ADIDAS	34035250.68	0.49%	37003	0.07%
11	百思图/BASTO	31707049.61	0.46%	88613	0.17%
12	爱步/ECCO	30398859.57	0.44%	32150	0.06%
13	红蜻蜓/REDDRAGONFLY	30374909.54	0.44%	137223	0.26%
14	耐克/NIKE	28659682.73	0.42%	83216	0.16%
15	意尔康/YEARCON	27902377.79	0.41%	220027	0.41%
16	热风/HOTWIND	27834875.94	0.4%	210856	0.39%
17	JIMMY CHOO	26600115.01	0.39%	9871	0.02%
18	天美意/TEENMIX	24610846.62	0.36%	62645	0.12%
19	CHRISTINE SHEII	23685306.14	0.34%	102225	0.19%
20	奥古狮登/AGSDON	23485407.56	0.34%	212608	0.4%

WeChat of CLIA



Thank You!
