Non-Leather Footwear Industry in India

By:

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Special Message

The Leather, Footwear and Accessories sector in India is witnessing exponential growth. Contributing to about 2% to India’s overall GDP and employing over 2 million workers, India is the second largest footwear producer and consumer in the world.

Following Prime Minister Narendra Modi’s Make-in-India initiative, the footwear industry has been chosen as a “Champion Sector”. The growth in this industry is fuelled by the growing domestic market, large workforce and low labour costs. I am happy to share that the government is giving thrust to this industry at the highest level. A series of path-breaking measures have already been initiated and many important steps are being planned for implementation in near future.

Aiming to showcase the many opportunities pertaining to emerging sub-sectors within footwear to the global investor community, I would like to congratulate Invest India for bringing out this report on Non-Leather Footwear Industry in India.

(SOM PARKASH)

Som Parkash
Union Minister of State for Commerce and Industry, Government of India
Special Message

The footwear industry in India is shaping new India’s growth story. India is a world leader in terms of production and consumption of footwear. Following Prime Minister Narendra Modi’s Make-in-India initiative, the footwear industry is being infused with the mantras of ‘skill, scale, speed’ for scaling up employment, production and exports. India already has a stronghold in the leather segment and possesses all advantages to become a global manufacturing hub for all kinds of footwear, including non-leather footwear.

In this regard, I would like to congratulate the Strategic Investment Research Team and Leather Team at Invest India for undertaking this initiative to launch the report on Non-Leather Footwear Industry in India to showcase the many opportunities pertaining to the non-leather footwear industry in India to the global and domestic investor community.

Anil Agrawal
Joint Secretary, Department for the Promotion of Industry and Internal Trade, Ministry of Commerce and Industry, Government of India
Foreword

The Hon'ble Prime Minister's focus on the restructuring of the economy is resulting in a rapid growth of the economy across several sectors, including footwear. India is the 2nd largest producer and consumer of footwear and contributes about 2 per cent to India's overall GDP.

It employs 2 Mn workers making the sector one of the top employment generators in the country. India's footwear market is estimated to reach USD 15.5 Bn by 2022, from USD 10.6 Billion in 2019. It is expected to grow at 11 per cent over the next five years. India's non-leather footwear industry is expected to cross USD 6 Bn mark by 2024.

India's economic growth and demographic profile make it a compelling opportunity for global footwear brands and manufacturers to produce and sell in India, as well those planning on expansion. The robust footwear ecosystem is currently driven by a large domestic market with higher disposable incomes and a growing labour force. India has one of the most liberal investment policies for foreign investments in the leather and footwear sector with 100 per cent foreign direct investment (FDI) allowed through the automatic route.

This report highlights India's non-leather footwear landscape, the opportunities and government policies, incentives, and schemes.

I hope you find it informative and useful.
Introduction

The leather and footwear industry in India is a high employment generating sector, contributing significantly to the country’s export earnings and economic growth.

From the simple padukas worn by priests in the 1st century to exquisite mojaris and juttis patronized by the Rajput and Mughal rulers respectively, to the widely popular Kolhapuri chappals which first became popular in the 18th century, India has had a long and rich history of diverse footwear.

Being the 2nd largest producer of footwear, 2nd largest exporter of leather garments and 5th largest exporter of leather goods\(^1\), the world now looks at India for a large proportion of its footwear and leather requirements. The footwear industry in India contributes about two per cent to India’s overall GDP\(^2\) along with employing 2 Mn workers\(^3\), making the sector one of the top employment generators in the country. Holding an important place in the Prime Minister’s drive to Make in India, the footwear segment has been chosen as a Champion Sector.

But it is not only leather footwear that is making waves these days. There is also a renewed focus on the non-leather footwear segment around the world. In worldwide consumption terms, 86 per cent of global footwear consumption has become non-leather by volume\(^4\). Herein, lies a double-digit growth opportunity which India, the second largest producer and consumer of footwear in the world, is ready to tap into. Already a leader in the traditional leather sector, it is now gaining steady ground in the production of non-leather footwear.

The non-leather footwear industry in India is fragmented and close to 75 per cent production comes from the unorganised sector, which includes micro, small, and medium enterprises (MSMEs)\(^4\). Chennai, Ranipet, Ambur in Tamil Nadu; Mumbai in Maharashtra, Kanpur and Agra in Uttar Pradesh, Jalandhar and Ludhiana in Punjab, Delhi, Karnal, Sonepat, Faridabad, Pune, Kolkata, Calicut and Ernakulam are some of the major non-leather footwear production centres in India.

Today, there are several factors driving this market, providing a level playing field for both, major global and domestic brands, to drive innovation in their product lines and capture the expanding market. The footwear sector in India is now de-licensed and de-reserved, paving the way for growth of capacities on modern lines with state-of-the-art machinery. To further assist this process, the government has permitted 100 per cent foreign direct investment (FDI) through the automatic route for the footwear sector.

1. https://www.thehindubusinessline.com/economy/budget/article28281076.ece
5. https://www.thehindubusinessline.com/economy/budget/article28281076.ece
Diving deeper into the transformative powers of this industry, this report elaborates on the domestic and global overview of the non-leather footwear segment and India's rising potential to tap global market in this segment.

As per a report released by the Department for the Promotion of Industry and Internal Trade (DPIIT), the sector has the capacity to generate 250 jobs for every investment of INR 1 crore.

For every 1,000 pairs produced and sold in India per day, the sector can create 425 jobs spanning manufacturing, allied industries and retail.
The global footwear market size is valued at USD 365.5 Bn in 2020 and is estimated to reach USD 530.3 Bn by 2027 with a Compound Annual Growth Rate (CAGR) of 5.5 per cent from 2020 to 2027. The global footwear market is segmented into type, material, end users, distribution channel, and region. By type, the market is categorized into athletic and non-athletic. Depending on material, it is bifurcated into leather and non-leather. On the basis of distribution channel, it is classified into hypermarket/supermarket, specialty stores, brand outlets, online sales channels and others.

### Production

As of 2018, the total number of shoes produced globally were 24.2 Bn pairs. As of 2010, the footwear production stood at 20.1 Bn pairs resulting in 20.5 per cent increase up till 2018. Out of the total production, 86.2 per cent of the shoes were being produced in Asia. The global leaders in footwear production are China, India, Vietnam and Indonesia, which highlights the domination of the Asia-Pacific region in the industry.
China is the largest producer of footwear in the world with a share of 55.8 per cent followed by India at 10.7 per cent\(^9\). The industry in China is largely export oriented where 70.8 per cent of the production is exported.

Similarly, Vietnam is also outward oriented where 97.8 per cent of the production is exported. On the other hand, India’s and Indonesia’s industries are driven by the domestic market.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Footwear Produced (Mn pairs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>China</td>
<td>13,478</td>
</tr>
<tr>
<td>2</td>
<td>India</td>
<td>2,579</td>
</tr>
<tr>
<td>3</td>
<td>Vietnam</td>
<td>1,300</td>
</tr>
<tr>
<td>4</td>
<td>Indonesia</td>
<td>1,271</td>
</tr>
<tr>
<td>5</td>
<td>Brazil</td>
<td>944</td>
</tr>
<tr>
<td>6</td>
<td>Bangladesh</td>
<td>461</td>
</tr>
<tr>
<td>7</td>
<td>Turkey</td>
<td>447</td>
</tr>
<tr>
<td>8</td>
<td>Pakistan</td>
<td>411</td>
</tr>
<tr>
<td>9</td>
<td>Mexico</td>
<td>268</td>
</tr>
<tr>
<td>10</td>
<td>Italy</td>
<td>184</td>
</tr>
</tbody>
</table>

**Consumption**

Asia is the largest consumer of footwear globally with a share of 53.8 per cent followed by Europe and North America with shares of 15.2 per cent and 14.5 per cent respectively.

In terms of the countries, China is the largest consumer of footwear with a world share of 18.4 per cent followed by India at 11.7 per cent and US at 10.7 per cent (Annexure 1).
Exports

The value of global export of footwear is valued at USD 142 Bn as of 2018. Asia is the largest exporter of footwear having a world share of 83.8 per cent. China is the largest exporter of shoes with a world share of 64.7 per cent. There have been increasing trends towards textile footwear. In 2009, only 17 per cent of the footwear in terms of the number of pairs being exported were textile. However, this percentage has almost doubled to 32 per cent as of 2018. On the contrary, the share of leather footwear in terms of number of pairs has reduced from 19 per cent in 2009 to 14 per cent in 2016. Although given the higher average price, the leather footwear represents 39 per cent of the value exported.

Imports

Europe is the leading continent for footwear imports, accounting for more than one third of total world trade at 35.5 per cent followed by Asia at 27.5 per cent. In terms of countries, USA has the largest world share at 18.9 per cent.
India is the 2nd largest producer and consumer of footwear in the world, generating employment for over 2 Mn people. The current market size of the footwear industry is estimated be at USD 10.6 Bn in 2019, estimated to grow to USD 15.5 Bn by 2024, registering a CAGR of 13 per cent from 2018 to 2019.
**Domestic Overview**

As of 2018, the total number of shoes produced in India were 2,579 Mn pairs\(^9\). Out of the global production, India’s share was pegged at 10.7 per cent.

**Production**

As of 2018, the total number of shoes produced in India were 2,579 Mn pairs\(^9\). Out of the global production, India’s share was pegged at 10.7 per cent.

**Exports**

India exported 262 Mn pairs in 2018, making it the 6th largest exporter of footwear, having a world share of 1.8 per cent\(^13\) having an export orientation of 10.2 per cent. The total value of exports in 2018 was USD 2,493 Mn, having an average price of USD 9.50.

Footwear holds the major share of 47.59 per cent in the total exports of leather and non-leather products, with an export value of USD 1,083.33 Mn (USD 937.13 Mn for exports of leather footwear and 146.20 for non-leather footwear).

Different performances within the two categories were registered as exports of leather footwear declined by 4.4 per cent in the period, while exports of non-leather footwear increased by 42.7 per cent\(^14\). Amongst the different categories of products of the industry, export of leather footwear, accounting for 38.57 per cent of total exports, increased by 0.95 per cent in the period.

**Consumption**

Over the last three years, India has surpassed US in terms of ‘consumption by volume’. India is the second largest consumer of footwear globally with a share of 11.7 per cent\(^11\) followed by US at 10.7 per cent and Indonesia at 4.5 per cent (Annexure 1).

The largest growth rate was registered by non-leather footwear with an increase in exports of 13.7 per cent\(^15\).

The overall footwear market in India is pegged to grow at 11 per cent over the next five years propelled by developments in the non-leather footwear segment\(^16\). Globally, 86 per cent of footwear consumption has become non-leather by volume and India is witnessing a similar trend. This growth in consumption has contributed to a major growth in revenue generated by the non-leather footwear industry.

**Imports**

India imported 289 Mn pairs in 2018 and is the world’s 10th largest importer, in terms of quantity, having a world share of 2.2 per cent\(^12\). Total value of imports is over USD 808 Mn.

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9. 2019 World Footwear Yearbook
10. 2019 World Footwear Yearbook
11. 2019 World Footwear Yearbook
12. 2019 World Footwear Yearbook
13. 2019 World Footwear Yearbook
16. KSA Technopak Analysis
Apart from being a top producer and consumer of footwear, India is the 6th largest exporter globally, commanding a share of only 1.8 per cent. This is because majority of the production stays in the country and feeds the growing domestic market comprising of roughly 1.4 Bn people.

**Non-Leather Footwear Industry in India**

**By Material**

As per industry estimates, the synthetic/non-leather footwear market in India is approximately 59 per cent of the total footwear market in India.
By Product Type

In terms of product type, the non-leather footwear accounts for 59 per cent of the overall footwear market in India. This 59 per cent share can be further subdivided in textile & other footwear (46 per cent) and athletic footwear (13 per cent).

Athletic Footwear

The Athletic footwear market in India is expected to grow annually by 14.3 per cent (CAGR 2020-2023)\(^\text{17}\).

Dominated by international players such as NIKE, ADIDAS, PUMA, REEBOK, SKECHERS, this sub-segment has also witnessed the proliferation of large domestic players such as Liberty Shoes, Campus, Action Shoes and many others.

Textile & Other Footwear

The textile & other footwear market in India is expected to grow annually by 12.9 per cent (CAGR 2020-2023)\(^\text{18}\).
By Product Type

In terms of product type, casual footwear is the largest product segment in India’s footwear market that contributes approximately 67 per cent of the total footwear retail market.

While the industry is currently dominated by the organized domestic SME footwear manufacturers, with changing consumer behavior and modern lifestyle, the footwear products made by those medium and large brands are likely to witness bigger sales in the near future.¹⁹

By Gender

The textile and other footwear market in India is expected to grow annually by **12.9 per cent (CAGR 2020-2023)¹⁸**.

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¹⁹. As shared by Mr. Mohan with Invest India on email dated 28.02.2020
The footwear market in India is now dominated by men’s footwear which contributes close to 58 per cent of the total Indian footwear retail market and is expected to grow at a CAGR of 10 per cent by 2020. The women’s footwear segment, however, is projected to grow at a much faster CAGR of 20 per cent.20

A USD 4.3 Bn industry which is Green, Clean and Sustainable

Zero dependency on Leather – a red category industry

- Limited land requirement to set up a factory
- Very low intensity of electricity is needed
- No harm caused to the air quality
- No noise pollution
- No effluent, liquid/water waste
- Limited water requirement
- No slaughtering of cattle, livestock
- No pollution

The footwear sector can create up to four Mn jobs in the next five years in India by imparting basic skills and creating blue collar jobs in a short span of six weeks. Having the potential to grow up to eight times more than its current size by 2030, this industry does not cause any harm to the environment nor adds pressure to existing resources such as land, water, energy.

Statistics highlight that the per capita footwear consumption in India is estimated to have grown from 1.7 pairs in 2016 to 2 pairs in 2019, as compared to the developed nations which have a per capita footwear consumption of 3 pairs21. This is where the future lies, creating opportunities for a rising India to tap in.

20. As shared by Mr. Mohan with Invest India on email dated 28.02.2020
21. World Footwear Report, 2019
Demand Drivers

1 Rising demand of athleisure

Changing consumer lifestyle alongside increasing consciousness towards fitness is pushing the demand for athleisure footwear to greater heights. The global athleisure footwear market is valued at USD 114.8 Bn by 2022, growing at a CAGR of 2.1 per cent during the forecast period 2016 – 2022.

Presence of prominent players such as Nike, Adidas, PUMA, Reebok, Asics Corporation have further fueled the growth of the athletic footwear market size by sales expansion through online channels, innovative product launches, and attractive marketing and promotional strategies.

2 Decrease in leather production

Leather is being consistently replaced by non-leathers material due to increasing awareness about sustainability and leather being a relatively more expensive material. Going forward, the usage in leather is going to be restricted for mostly niche products.

3 Emergence of the organized retail sector

The retail market in India has undergone a major transformation and witnessed tremendous growth in the last 10 years. The overall retail market, that grew to USD 0.7 Trillion (Tn) in 2019, is expected to cross the USD 1.1 Tn mark by 2025. Factors that make India so attractive include its large population, a middle-class of 600 Mn people, increasing urbanisation, rising household incomes, connected rural consumers and increasing consumer spending.

Apparel and footwear brands in the country are exhibiting a growing consciousness about their retail presence. The brands are looking to tap the emerging opportunities available in tier-2 and 3 markets.

Grew to USD 0.7 Trillion (Tn) in 2019

Retail Sector : Key Segments

Food and Grocery: 16%
Apparel & Footwear: 9%
Furnishing & Consumer Durables: 10%
Others: 66%
Apparel and footwear have seen double-digit growth in the last few years and are likely to propel growth in organised retail in the coming decade.

Foreign players have witnessed robust growth in the Indian retail space

- **Sketchers**
  - Expects INR 1000 Cr (USD 133 Mn) revenue in India by 2021
  - India is now one of the top 3 revenue generating geographies for Sketchers
  - Plan on doubling stores to 500 stores by 2022

- **Puma**
  - India is one of the top 5 markets for Puma
  - Increased their stores 3 times in 3 years, from 30 (2016) to 90 (2019)
  - Plans to add 20 more company owned stores pan-India by 2020

- **Adidas**
  - Owns 40% market share with Reebok
  - Company owned stores and 700+ franchise retail stores
  - Increased their stores 5 times in 2 years, from 4 (2017) to 20 (2019)
  - Aims to open 40 more stores

Opportunity for global manufacturers to be closer to end consumer and increase speed to market

Emerging role of e-commerce

The Indian e-commerce industry, especially, has been on an upward growth trajectory. By 2026, it is expected to reach USD 200 Bn and by 2034, it is predicted to surpass the United States to become the second largest e-commerce market globally. A young demographic, increasing internet and smartphone penetration, and relatively better economic performance are some of the key drivers of this sector.

Internet penetration in India grew from just 4 per cent in 2007 to 52 per cent in 2019, registering a CAGR of 24 per cent during the same period.

The advent of e-retail has already democratised the shopping space and has also been successful in empowering India's small sellers while breaking go-to-market barriers for insurgent footwear brands.

**Increasing Digital Influence**

Online share of total retail sales in India

<table>
<thead>
<tr>
<th>Year</th>
<th>Electronics</th>
<th>Toys &amp; Games</th>
<th>Home &amp; Furnishings</th>
<th>Health</th>
<th>Accessories &amp; Footwear</th>
<th>Beauty &amp; Personal Care</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>1.4%</td>
<td>15.3%</td>
<td>5.0%</td>
<td>2.3%</td>
<td>1.8%</td>
<td>1.6%</td>
</tr>
<tr>
<td>2018</td>
<td>0.5%</td>
<td>13.1%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>0.3%</td>
<td>10.8%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>0.1%</td>
<td>5.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>0.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>0.2%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>0.1%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: BCG Analysis

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Non-Leather Footwear Industry

Demand Drivers

The rising demand for synthetic footwear has resulted in it emerging as a successful alternative for leather products. Due to awareness of global warming and better scope of designs in synthetic products, many countries, have aggressively changed their preferences from leather to synthetic. Major production centres for footwear in India have been established from the existing leather cluster ecosystem in the country.

## Clusters of non-leather footwear manufacturing in India

- **Punjab**: Jalandhar, Ludhiana
- **Haryana**: Karnal, Sonapar, Bahadurgarh, Faridabad
- **Uttar Pradesh**: Agra, Kanpur
- **Delhi**: Major centre for producing non-leather footwear
- **Maharashtra**: Mumbai, Pune
- **West Bengal**: Calcutta
- **Kerala**: Calicut, Ernakulam
- **Tamil Nadu**: Chennai, Ranipet, Ambur
The footwear sector is a very significant segment and the engine of growth for the entire Indian leather industry. India is the second largest producer of footwear after China, accounting for 13 per cent of global footwear production. Nearly 95 per cent of its production goes to meet its own domestic demand. The footwear sector is now de-licensed and de-reserved and the government has permitted 100 per cent FDI through the automatic route for this sector.

The government has undertaken various measures to create a conducive investment climate for attracting overseas investments and increasing cost competitiveness. As a result, India has jumped to 63rd position in World Bank’s Ease of Doing Business 2020 report.

Many foreign companies such as Apache and Feng Tay have set up production of non-leather footwear in India, many footwear brands source from India and many other footwear companies have entered India through joint ventures with domestic players.

One such successful example is Clarks Future Footwear, the equal joint venture (JV) company between the UK-based C&J Clarks and Future Lifestyle Fashions which was founded in 2010. The sales by retail value for the company in India is around INR 350 crore (USD 47.8 Mn), of which, net sale value is INR 180 crore (USD 24.6 Mn). The company expects to grow the sales by retail value to close to INR 500 crore (USD 68 Mn) over a period of three years. Almost 50 to 60 per cent of the products it sells in India are sourced from the country itself to promote ‘Make in India’.27

Consolidated FDI data for leather and footwear
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USD 206.33 Mn
Percentage of total inflows 0.04%26

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Relaxation of FDI Norms
100% Foreign Direct Investment is permitted through automatic route

Competitive tax regime
Corporate Income tax reduced from 30% to 17%. No Dividend distribution tax

Fast-track clearances
Empowered Group of Secretaries to ensure time bound approvals

Streamline labour laws
Relaxation in state labour laws (working hours, licensing) on-going

Repatriation of profits
100% Repatriation of profit & dividends if investment in convertible foreign currency

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India advantages

India is a rapidly growing industrial economy which can capitalize on its strengths of ready availability of key resources such as land, power, water, manpower and a conducive regulatory framework for non-leather footwear industry to thrive.

1 Large and Growing Domestic Market

Indian domestic market has performed better than the largest consumption regions such as United States, European Union and Japan combined. Beyond the increasing income of Indian consumers, the market growth is led by following important drivers:

a) Indian consumers shifting from need-based to aspiration-based buying

b) 40 per cent of the Indian population is expected to be in urban areas by 2030, up from 21 per cent in 2011

c) India is expected to become the world's fastest growing e-commerce market

d) Increasing participation of women in workforce

e) Growing presence of international brands and retailers and the emergence of new product categories

2 Ready state-of-the-art Infrastructure

India, having the 2nd largest road network in the world, 4th largest rail network in the world and being the 16th largest maritime country in the world, has been receiving much impetus for bolstering up infrastructure furthermore.

To make India a global hub for manufacturing, the government has dedicated a significant proportion of fiscal stimulus to infrastructure spending by means of launching priority mega projects, creating a multiplier effect on the economy. Strategic focus on economic corridors, investments in high speed rail, and dedicated freight corridors are causing India to undergo an unprecedented physical transformation. The National Infrastructure Pipeline (NIP) is a major step in that direction, with investments over USD 1.4 Tn to be made by the government to build world-class infrastructural facilities.
Footwear manufacturing, being labour-intensive majorly factors in the cost competitiveness in terms of manpower. India not only offers the most competitive labour costs worldwide but has a ready pool of a large, young trained workforce with 62 per cent of population in the working age group of 15 to 59 years. Based on the current demographics of India, the current workforce is expected to work until 2055.

With this abundant availability of manpower coupled with relatively lower costs (India’s labour cost is USD 0.95 per hour against China’s cost of USD 2.58 per hour, both costs are inclusive of all benefits), India possesses the necessary preconditions for this sector to thrive.

India has taken a quantum leap and continues to position its labour costs, power and water costs as competitively as possible.

<table>
<thead>
<tr>
<th>Countries</th>
<th>Labour Wages</th>
<th>Power Cost</th>
<th>Water Cost</th>
<th>Lending Rate</th>
<th>Corporate Rate Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>550 - 600</td>
<td>0.15 - 0.16</td>
<td>55 - 60</td>
<td>6.0% - 7.0%</td>
<td>25%</td>
</tr>
<tr>
<td>India</td>
<td>160 - 180</td>
<td>0.10 - 0.12</td>
<td>16 - 20</td>
<td>11% - 12%</td>
<td>17%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>190 - 200</td>
<td>0.08 - 0.10</td>
<td>50 - 80</td>
<td>7.0% - 8.0%</td>
<td>20%</td>
</tr>
</tbody>
</table>

The government of India has approved a special package for employment generation in leather and footwear sector called Indian Footwear, Leather & Accessories Development Programme (IFLADP) with an approved expenditure of INR 2600 crore (USD 348 Mn) over three financial years from 2017-18 to 2019-20. (Annexure 4)

In order to spur local medium and small enterprises that are involved in manufacture of footwear, the Union Budget 2020 has pushed to increase the custom duty on footwear from 25 to 35 per cent.

India advantages

Non-Leather Footwear Industry

Favourable policy ecosystem and support by the government

Comparative Factors of Production

3. Availability of Manpower

4. Comparative Factors of Production

5. Favourable policy ecosystem and support by the government

33. Peter Magione Associates
India has significant transit time advantage for supply to US East Coast and Europe, as shown in the table below.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Route</th>
<th>India (in days)</th>
<th>Vietnam</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>USA</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New York &amp; New Jersey (East Cost)</td>
<td>Via Suez Canal</td>
<td><strong>22-23</strong></td>
<td>29-30</td>
</tr>
<tr>
<td>Los Angeles (West Coast)</td>
<td>Direct Way</td>
<td><strong>28-29</strong></td>
<td>19-20</td>
</tr>
<tr>
<td><strong>Europe</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Port of Rotterdam (Netherlands)</td>
<td>Via Suez Canal</td>
<td><strong>17-18</strong></td>
<td>24-25</td>
</tr>
<tr>
<td>Port of Algeciras (Spain)</td>
<td>Via Suez Canal</td>
<td><strong>13-14</strong></td>
<td>21-22</td>
</tr>
</tbody>
</table>

*Assuming speed of 16 knots
Source: Sea-distances.org, https://www.searates.com/services/distances-time, BCG Analysis
Apache Pioneer, Apache Tackle, Apache Innovate, we are all in Apache.

“Apache Group is a Taiwan based company which have a rich experience of footwear manufacturing spanning over three decades. Apache was established in 1990 and since 1992, we are exclusive supplier to the brand ADIDAS with the vision of being its most reliable partner with agility and innovation. Apache has three production bases, one each in China, India and Vietnam with a monthly capacity of manufacturing 3 Mn pairs.

Apache India was established in 2006 in Andhra Pradesh. So far, we have grown to a monthly capacity of 1.5 Mn pairs with 12,500 employees and continue to grow, setting the future target to double our capacity with 20,000 employees.

Apache’s success story stems from localization, equal opportunity in gender and transparency to its people. Apache India’s success in Andhra Pradesh would have not been possible without its employees’ great contribution over 14 years.

The support rendered by the state government of Andhra Pradesh, bringing in a positive change in the infrastructure with a vision to promote industrial development, is bearing fruit.

Apache strongly believes that India is a good destination to invest and with support from the state and central governments, India is the place which will become the next manufacturing hub of the world.”

Muthu Govindaswamy
Vice General Manager
Business Operations
Apache Group, Apache Footwear India Pvt Ltd (Apache SEZ)
“There is a climate right now for international brands to diversify their sourcing into multiple countries instead of one. Casa Everz Gmbh also decided to do the same under Von Wellx Germany with Iatric Industries Pvt. Ltd. because of India’s quality and service capabilities, labour and material advantage and intention shown by the government to support industries in their requirement to compete globally against countries like China, Bangladesh, Vietnam and others. All these 3 pillars make for a good opportunity for any global brand.”

**Mr. Ashish Jain,**
Director and CEO,
Iatric Industries Pvt. Ltd. (Von Wellx)

German footwear brand Von Wellx, owned by Casa Everz Gmbh, has decided to relocate its entire production to India. The company will begin manufacturing at Agra in Uttar Pradesh in partnership with Iatric Industries Pvt Ltd. The collaboration will enable more than 10,000 direct and indirect job creations. The development comes days after Prime Minister Narendra Modi called for self-reliant India amid COVID-19 pandemic.36

“Boasting an annual production and consumption of some 2.6 Bn pairs, India is the second-largest footwear producer and consumer in the world. The country exports about 10 per cent of the footwear it manufactures each year, roughly 260 Mn pairs, still enough to be among the world’s top ten exporters. About 28 Mn pairs shipped to American shores peg the country as the fifth-largest supplier to the US, despite having average landed costs at the US port well above the world average cost every year for the last two decades. The country’s large and young workforce, relatively low wages, and abundant cattle herd make it a viable competitor in the global footwear market.”

**Matt Priest**
President and CEO
Footwear Distributors & Retailers of America (FDRA)

“Non-leather footwear Industry is predominantly dominated by sports footwear, athleisure footwear and PU-moulded footwear. World-wide consumption of non-leather footwear is around 86 per cent and has been increasing over the last 10 years. Indian consumption is also very similar, and we have a phenomenal opportunity.”

**Mr. N. Mohan**
Executive Director & CEO
Clarks Future Footwear

Impact of COVID-19 on the footwear industry in India

The ongoing coronavirus pandemic across the globe is severely affecting the production, import, and export of leather and non-leather footwear, which, in turn, is anticipated to negatively affect the growth of the global market.

Issues and Challenges

1. **Lack of Supply of Footwear Components**

   - Supply of raw material imports such as laces, shoe lining, buckles, ornaments, insoles, outsoles, cellulose board, shank board, foam and packing material from China had stopped completely since January.

   - In Agra, which is the largest footwear hub in India, the industry is adversely impacted. According to industry sources, raw material worth INR 15 crore (USD 2 Mn) for manufacturing finished footwear is imported from different parts of China to Agra every month.

   - Footwear components can be imported from Italy or Spain, but they cost more as compared to China and these are not manufactured in India, as it is too expensive here.

2. **Impact on Export**

   - The spread of coronavirus has affected the shoe industry at a crucial time. January and February are peak months when manufacturing is done for exports during summer, especially keeping in mind that footwear alone accounts for 46 per cent of the overall exports from India's leather

Strategy to address the crisis

1. To tackle any such future irregularity in supply chains, Indian importers need to diversify risks and reduce dependency on one single market to meet 70-80 per cent of their sourcing demands by exploring other markets for footwear components.

2. Reduction on duties of footwear components (at present 20 per cent) could cushion the impact as Indian manufacturers explore other markets to import from.
The footwear industry in India is expected to grow significantly in the coming years.

However, below are a few areas where much scope for improvement exists and the government is taking major strides to ensure a conducive industry ecosystem to transform India into a global footwear manufacturing hub:

1. **Promoting indigenous manufacturing of raw material:**

   Currently, almost all raw materials and footwear components are imported in India, owing to little or no domestic manufacturing of products such as PVC, PU, heels, in-soles, and hardware. The government needs to incentivize manufacturing of raw material and footwear components through change in policies for reducing import dependence and help in reducing the overall manufacturing costs.

2. **Enhance scalability:**

   One of the biggest challenges faced by the sector is the small size of production units and fragmented nature of manufacturing. This makes it difficult for the domestic industry to reap the benefits that large economies of scale have to offer. The bigger size of companies would also allow for investment in technologies which would allow them to tap into higher value-added items. There is a need for robust infrastructure development which can be done through the development of leather and footwear products complex with plug and play facilities ready for factories to move in.

**Promoting indigenous manufacturing of raw material:**

It would be key to improve the lead times which would allow India to be globally more competitive. This would also involve investments in improvement of inland logistics through infrastructural development in roads and ports. Furthermore, there are very few ‘Very Large Capacity Containers’ (VLCC) that come to Indian ports to load cargo and thus, exports have to be trans-shipped through Colombo which increases costs.

<table>
<thead>
<tr>
<th>Country</th>
<th>Logistics Cost ($/km of road transport)</th>
<th>Time taken at port for Customs and Clearance (days)</th>
<th>Time taken for shipping from port to US east coast (days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>2.4 - 2.5</td>
<td>1.5</td>
<td>14</td>
</tr>
<tr>
<td>Vietnam</td>
<td>7.0</td>
<td>6</td>
<td>14</td>
</tr>
<tr>
<td>Bangladesh</td>
<td>3.9</td>
<td>10</td>
<td>21</td>
</tr>
<tr>
<td>India</td>
<td>7.0</td>
<td>6</td>
<td>21(JNPT)/28</td>
</tr>
</tbody>
</table>

Source: Economic Survey 2016-17

**Leveraging India’s Market Access Arrangements:**

India’s competitor nations have gained a significant edge as result of their Least Developed Countries (LDCs) status and trade agreements. For example, Vietnam has zero duty access to both the EU and US whereas Bangladesh has zero duty access to EU, giving them access to these huge consuming markets. India currently has Free Trade Agreements (FTAs) with the ASEAN countries where our trade has been limited to importing raw materials and finished products at a lower price than incentivising indigenous manufacturing, thereby, inhibiting the growth of the domestic footwear sector. Instead, India needs to focus on having Preferential Trade Agreements (PTAs) / FTAs with key consuming markets to give a boost to the labour intensive manufacturing industries.
2 Creation of a seamless tax structure

Increase in custom duties only in the long run:

In order to promote domestic manufacturing and generate employment in the footwear sector, customs duty has been hiked on components specifically, from 15 per cent to 20 per cent. Although, the measure was taken to avoid the import of low value-added products, it has not borne fruit owing to illicit practices. Since the ecosystem for manufacturing of raw materials in India is at a nascent stage, the increase in import duty on raw materials increases the overall cost of manufacturing finished products. Hence, it will be useful to increase the custom duty on components only in the long run, as also resonated by the industry wide opinion.

Resolving inverted duty structure and rationalization of GST:

Currently, the uneven GST rates in the footwear value chain have led to an inverted duty structure where lower duties are levied on the finished product while duties on raw materials are higher (Annexure 2), discouraging domestic value addition.

The existing challenge with our tax structure, wherein the footwear below INR 1000 is taxed at 5 per cent and anything higher than INR 1000 is taxed at 18 per cent, has been discouraging value addition as the tax increase is steep. The large difference of this tax between the two categories creates a distortion by having a significant effect on the demand for the category that is over INR 1000. Due to the low consumer demand of this category, manufacturers do not get the incentive to produce large volumes and increase their scale of production. This ultimately affects the demand from the manufacturers’ side to set up a supply chain in India.

This dual rate of GST also causes possible evasion by under-invoicing to below INR 1000. Major footwear manufacturers have lobbied for a uniform tax rate across the footwear value chain at 12 per cent.

3 Undertaking skilling initiatives

One of the youngest countries in the world, India has the advantage of a productive workforce owing to its promising demographic dividend where over 65 per cent population is below 35 years of age. The Indian workforce is expected to increase to approximately 600 Mn by the year 2022 from the current estimate of 473 Mn.

Multi-skilling of shop floor workers:

The footwear industry in India currently employs over 2 Mn employees and is slated to add double the number of workers by 2022. India’s footwear industry has the lowest cost structure in terms of labour in the world, making India highly competitive in this segment.

However, entry-level operators, cutters, stitchers, skivers, finishers have limited knowledge on machine handling and troubleshooting aspects, directly affecting productivity since training provided to process line workers is time consuming and eats into the production time.

There is a need to extend financial support for multi-skilling of shop floor workers. A separate scheme for training qualified industrial engineers with defined minimum qualifications for implementing modern industrial engineering techniques on shop floors may be introduced.
Collaboration between government and industry:

There should be investments in improving skills as a collaborative effort between the private sector and the government. Abundant availability of trained and certified manpower should become the norm and efforts must be made to achieve per man hour, per machine output in terms of quality and quantity of the levels prevailing in competing countries.

Existing skill development initiatives through the National Skill Development Corporation should be appropriately scaled up in partnership with the industry along with putting in place a credible mechanism for assessing quality and productivity of workers to hold them more accountable.

Dedicated courses on footwear manufacturing, design and retailing:

India is currently witnessing a boom in entrepreneurial spirit with fresh graduates from various institutes opting for entrepreneurship. India has the 3rd largest startup ecosystem in the world. The government needs to work with various entrepreneurship development institutes for initiating courses on entrepreneurship in footwear manufacturing and designing. This would help in creating a pool of energetic youth transforming the sector. Introduction of specific courses in various educational institutions may also hold the key to ensure that we have abundant workforce with specialised skills required for footwear manufacturing, designing and retailing.

Technical training:

There is a growing need to train more specialised staff with technical skills and capability of working on imported machines in this specific sub-segment as the industry transitions from a cottage-based model to a factory model. Domestic companies such as Mochiko and SSIPL manufacturing in the athleisure segment are employing close to 5,000 workers and spend a minimum of three months to train their workers in-house.

Building ‘Brand India’

Strategic branding:

The nature of the footwear industry in India is highly fragmented, comprising mainly of MSME players which are often unable to give due importance to marketing and branding activities unlike the large players such as NIKE, PUMA, ADIDAS and others, that place major emphasis on strategic branding. At a company level, low marketing budgets result in ineffective and short-term marketing campaigns which do not go beyond generating awareness. Hence, it is imperative to create a larger ‘Brand India’ that can subsume the marketing activities of such MSME players in the footwear industry.

Penetrating the global market:

To change the perception of quality associated with Indian footwear, marketing efforts must be made to showcase India as a manufacturing destination for quality products at competitive prices. Stepping up execution of “Made in India” branding through co-funding would expand the attributes such as sustainability, which both global as well as domestic buyers, value. Investing in “go-to-market” strategies by supporting Indian exporters to participate in large global trade events of a significant scale would allow Indian players to create ‘Brand India’ and collectively create a place in the global ecosystem.
Institutionalizing the USD 4.3 Bn non-leather footwear industry

**Creation of an ecosystem for innovation and development:**

The footwear industry in India is largely unorganized. Furthermore, the supply chain of the footwear industry is largely dispersed leading to longer lead times and higher costs when compared to other countries. This fragmented nature calls for consolidation of industry as a hub through cluster-isation, which would be a key to robust infrastructure development and the creation of an ecosystem for innovation within the country. Establishment of a footwear hub, research centers, laboratories, will lead to the improvement of the supply chain of this sector. The development of large clusters for small-scale and large-scale factories in this category would be one of the biggest factors that can contribute to the growth of this industry.

**Segregation of leather and non-leather as sectors:**

Roughly 59 per cent of the footwear market in India is constituted of non-leather footwear. Segregating the non-leather and leather footwear segments will be a major step in the direction of giving recognition to the growing non-leather sub-sector. Presently, all the associations are for leather and non-leather footwear combined, which does not entirely recognise the interests of non-leather footwear sector separately. Additionally, having a dedicated association for non-leather footwear would promote the interests of non-leather footwear manufacturers.

**Resource optimization and industrial upgradation:**

The government of India is developing a national level land bank by integrating the Industrial Information System (IIS) with state industrial GIS systems to serve as a one-stop solution for free and easy accessibility of all industrial information.

**Classification of footwear category:**

Footwear and leather products industry (excluding tanning and hide processing) has been classified under the “Green” category, currently. To further boost domestic manufacturing and streamline environmental clearances, the industry should be classified under the “White” category which requires no green clearance at all.
Annexures:

Annexure 1

The top ten footwear consuming countries are as follows (2018):

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
<th>Pairs (Mn)</th>
<th>World Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st</td>
<td>China</td>
<td>4110</td>
<td>18.4%</td>
</tr>
<tr>
<td>2nd</td>
<td>India</td>
<td>2606</td>
<td>11.7%</td>
</tr>
<tr>
<td>3rd</td>
<td>USA</td>
<td>2391</td>
<td>10.7%</td>
</tr>
<tr>
<td>4th</td>
<td>Indonesia</td>
<td>997</td>
<td>4.5%</td>
</tr>
<tr>
<td>5th</td>
<td>Brazil</td>
<td>857</td>
<td>3.8%</td>
</tr>
<tr>
<td>6th</td>
<td>Japan</td>
<td>724</td>
<td>3.2%</td>
</tr>
<tr>
<td>7th</td>
<td>Germany</td>
<td>451</td>
<td>2.0%</td>
</tr>
<tr>
<td>8th</td>
<td>Pakistan</td>
<td>424</td>
<td>1.9%</td>
</tr>
<tr>
<td>9th</td>
<td>UK</td>
<td>420</td>
<td>1.9%</td>
</tr>
<tr>
<td>10th</td>
<td>France</td>
<td>416</td>
<td>1.9%</td>
</tr>
</tbody>
</table>
### Annexure 2

**GST across different HSN codes is**

<table>
<thead>
<tr>
<th>HSN Code</th>
<th>Description</th>
<th>Rate (per cent)</th>
</tr>
</thead>
<tbody>
<tr>
<td>6401</td>
<td>Waterproof footwear with outer soles and uppers of rubber or of plastics, the uppers of which are neither fixed to the sole nor assembled by stitching, riveting, nailing, screwing, plugging or similar processes</td>
<td>18</td>
</tr>
<tr>
<td>6402</td>
<td>Other footwear with outer soles and uppers of rubber or plastics</td>
<td>18</td>
</tr>
<tr>
<td>6403</td>
<td>Footwear with outer soles of rubber, plastics, leather or composition leather and uppers of leather</td>
<td>18</td>
</tr>
<tr>
<td>6404</td>
<td>Footwear with outer soles of rubber, plastics, leather or composition leather and uppers of textile materials</td>
<td>18</td>
</tr>
<tr>
<td>6405</td>
<td>Other footwear</td>
<td>18</td>
</tr>
<tr>
<td>6406</td>
<td>Parts of footwear (including uppers whether or not attached to soles other than outer soles); removable in-soles, heel cushions and similar articles; gaiters, leggings and similar articles, and parts thereof</td>
<td>18</td>
</tr>
<tr>
<td>64</td>
<td>Footwear having a retail sale price not exceeding (INR 500/INR 1000 substituted on 27/07/2018) per pair, provided that such retail sale price is indelibly marked or embossed on the footwear itself.</td>
<td>5</td>
</tr>
</tbody>
</table>

**Source:** https://cleartax.in/s/shoes-footwear-products-gst-rate-hsn-code
Annexure 3
Key players in the non-leather footwear segment in India

DOMESTIC MANUFACTURERS

FOREIGN MANUFACTURERS

INTERNATIONAL BRANDS
Annexure 4
Government Initiatives and support

**Indian Footwear, Leather & Accessories Development Programme (IFLADP)**

The government of India has approved a special package for employment generation in leather and footwear sector. The package involves implementation of Central Sector Scheme "Indian Footwear, Leather & Accessories Development Programme" with an approved expenditure of INR 2600 crore (USD 348 Mn) over three financial years from 2017-18 to 2019-20.

The scheme would lead to development of infrastructure for the leather sector, address environmental concerns specific to the leather sector, facilitate additional investments, employment generation and increase in production. Enhanced tax incentives would attract large scale investments in the sector and reforms in labour laws in view of the seasonal nature of the sector will support economies of scale.

IFLADP has the potential to generate 324,000 new jobs in three years and assist in formalization of 200,000 jobs as cumulative impact in footwear, leather and accessories sector.

**Details of the Indian Footwear, Leather & Accessories Development Programme:**

**Human Resource Development (HRD) sub-scheme:**

It proposes to provide assistance to placement linked skill development training to unemployed persons at INR 15,000 (USD 200) per person, for skill upgradation training to employed workers at INR 5,000 (USD 67) per employee and for training of trainers at INR 2 lakh (USD 2680) per person. The placement of 75 per cent of trained persons is proposed to be mandatory for availing assistance related to skill development training component.

The proposal under the sub-scheme is to train/skill 432,000 unemployed persons, upgrade the skills of 75,000 existing employees and train 150 master trainers during the three years with proposed outlay of INR 696 crore (USD 93 Mn).

**Integrated Development of Leather Sector (IDLS) Scheme:**

It proposes to incentivize investment and manufacturing including job creation by providing backend investment grant/subsidy at 30 per cent of the cost of new plant and machinery to MSMEs and at 20 per cent of the cost of plant and machinery to other units for modernization/technology upgradation in existing units and also for setting up of new units. The proposal under this sub-scheme is to incentivize 1,000 units in leather, footwear and accessories and components sector during the three years with proposed outlay of INR 425 crore (USD 57 Mn).

**Establishment of institutional facilities sub-scheme:**

It proposes to provide assistance to Footwear Design & Development Institute (FDDI) for upgradation of some of the existing campuses of FDDI into “Centres of Excellence” and establishing three new fully equipped skill centres alongside the upcoming mega leather clusters, based of project proposals, with proposed outlay of INR 147 crore (USD 20 Mn) for three years.
Mega leather, Footwear and Accessories Cluster (MLFAC) sub-scheme:

It aims at providing infrastructure support to the leather, footwear and accessories sector by establishment of mega leather, footwear and accessories cluster. Graded assistance is proposed to be provided up to 50 per cent of the eligible project cost, excluding cost of land with maximum government assistance being limited to INR 125 crore (USD 17 Mn). The outlay of INR 360 crore (USD 48 Mn) has been proposed to support new MLFACs, for three years.

Leather technology, innovation and environmental issues sub-scheme:

Assistance is proposed to be provided for the upgradation/installation of Common Effluent Treatment Plants (CETPs) @ 70 per cent of the project cost. The sub-scheme will also provide support to national level sectoral industry council/association and support for preparation of vision document for leather, footwear and accessories sector. The proposed outlay for this sub-scheme is INR 782 crore (USD 104 Mn) for three years.

Promotion of Indian Brands in Leather, Footwear and Accessories Sector sub-scheme:

The eligible units approved for brand promotion are proposed to be assisted. The government assistance is proposed to be 50 per cent of total project cost subject to a limit of INR 3 crore (USD 0.4 Mn) for each brand, each year for 3 years. The proposal under this sub-scheme is to promote ten Indian brands in the international market in three years with proposed outlay for INR 90 crore (USD 12 Mn).

Additional Employment Incentive for Leather, Footwear and Accessories Sector sub-scheme:

It is proposed to provide the employers’ contribution of 3.67 per cent to Employees’ Provident Fund for all new employees in leather, footwear and accessories sector, enrolling in EPFO for first 3 years of their employment. The sub-scheme would be applicable to employees with salary up to INR 15,000 (USD 200). The proposed outlay is INR 100 crore (USD 13 Mn) to assist in formalization of approximately 200,000 jobs in the sectors.

The special package also includes measures for simplification of labour laws and incentives for employment generation, as under:

1. Enhancing Scope of Section 80JJAA of Income Tax Act:

For providing deduction to Indian companies engaged in manufacture of goods in a factory towards additional wages paid for three years to new workman, the provisions of minimum 240 days employment in a year to a workman under Section 80JJAA of Income Tax Act would be further relaxed to 150 days for footwear, leather and accessories sector considering the seasonal nature of this sector.

2. Introduction of fixed term employment:

In order to attract large scale investments at global scale, the regulatory framework for labour related issues is proposed to be addressed by introduction of Fixed Term Employment under Sub Section (1) of sector 15 of Industrial Employment (Standing Order) Act, 1946, keeping in mind the seasonal nature of leather, footwear and accessories industry.
Annexure 5

The National Infrastructure Pipeline (NIP) is a major step in that direction, with investments over USD 1.4 Tn to be made by the government to build world-class infrastructural facilities.

Roads: A Vast Network of National Highways

The Golden Quadrilateral
North-South Corridor
East-West Corridor

2nd Largest road network with over 5.5 Mn Kms (2016)
National Highways 2% of road network (~1,20,000 kms length)
5% of freight and 80% passenger traffic
Top Recipient of PPP funding in 2008-12
#1 in PPP Operational Maturity (ADB Infrascope 2014)
Railways

- 4th Largest rail network with over 66,687 Kms (2016)
- Busiest rail network in the world
- 4th largest rail freight carrier in the world
- 25+ port rail connectivity projects 600 stations re-development
- 3,343 Km greenfield DFC under construction, 6,779 Km more to be developed
India advantages

Industrial Corridors

Industrial Corridors And Influence Zone

- Delhi-Mumbai Industrial Corridor
- Amritsar Kolkata Industrial Corridor
- Bengaluru-Mumbai Economic Corridor
- Chennai-Bengaluru Industrial Corridor
- Chennai-Vizag Industrial Corridor
India advantages

Non-Leather Footwear Industry

Ports

- 12 Major Ports, 200 Non-Major Ports & 5 Waterways
- 7 Greenfield ports & 44 capacity enhancement projects
- 80+ Port Connectivity Projects
- 15 Bulk and 14 discrete manufacturing clusters proposed in 14 CEZs
- 111 national waterways to be developed
Acknowledgements

The authors would like to thank the following stakeholders for their valuable time and inputs on the subject:

Dr. Selvam, Council for Leather Exports (CLE)

Mr. N Mohan, Clarks

Mr. Amit Chopra, Shoes & Accessories

Mr. Puran Dawar, President, Agra Footwear Manufacturers & Exporters Chambers (AFMEC)

Mr. Adesh Gupta, Chairman, Council for Footwear, Leather and Accessories (CFLA)

Mr. Amrit Gulati, President, Footwear Wholesaler's Association, New Delhi

Mr. Matt Priest, President and CEO, Footwear Distributors & Retailers of America (FDRA)

Mr. Gopal Gupta, HK Gupta Overseas

Mr. Opinder Singh, President, Agra Shoe Manufacturing Association

Mr. Anupam Bansal, Liberty Shoes

Mr. Ajay Rawat, Puma

Mr. Virender Awal, Mochiko

Mr. Ingit Saxena, SSIIPL

Mr. Vikas Bagga

Mr. Muthu, Apache

Mr. Ashish Jain, Latric Industries Pvt. Ltd. (Von Wellx)