



FOOTWEAR DESIGN AND DEVELOPMENT INSTITUTE

(Ministry of Commerce & Industry, Government of India)



Indian Footwear Industry

---A Retail Perspective

A STUDY OF FOOTWEAR
INDUSTRY AND ITS MAJOR
PLAYERS
(BATA, LIBERTY, ADIDAS AND
NIKE)

FOOTWEAR HISTORY

Presentation on Invention of shoe

COURSE NO.-VSR -511



pb 10/27/15

A History of Shoes

The history of shoes--that is to say, archaeological and pale anthropological evidence for the earliest use of protective coverings for the human foot--appears to start during the Middle Paleolithic period of approximately 40,000 years ago.



The Origins of Shoe Use

- It is probable that the first shoes were worn by ancient man in the Ice Age, around 500,000 years ago, out of necessity to protect against the harsh climate.
- Historians hypothesise that indeed footwear must have been necessary **to deal with the conditions.**
- However, protective footwear similar to the modern-day shoe is considered to be a much later development.
- It has been **difficult for archaeologists to determine** exactly when humans stopped going barefoot, however, because the plant and animal materials used to make prehistoric shoes is highly perishable.

Scientists have suggested that strong protective first came into widespread use between 40,000 and 26,000 years ago. These dates were established by examining the foot bones of early modern humans from 10,000 to 100,000 years ago.

- Humans from 100,000 to 40,000 years ago have stronger and thicker small toes than those of around 26,000 years ago.
- Currently, the earliest use of shoes that hard evidence supports is the end of the Upper Palaeolithic period, and the end of the last Ice Age, around 10,000 years ago.

When was the first shoe invented?

- In Mesopotamia, (c. 1600-1200 BC) a type of soft shoes were worn by the mountain people who lived on the border of Iran.
- The soft shoe was made of wraparound leather.

Who invented the shoe?

- At the time, no machine could attach the upper part of a shoe to the sole. This had to be done manually by a "hand laster"; a skilled one could produce 50 pairs in a ten-hour day.
- After five years of work, **J.E Matzeliger** obtained a patent for his invention in 1883.



Timeline of Shoes

- 40000 BC– First archeological evidence of protective foot covering found in Ice Age settlements.
- 4000 BC–First recorded mentioning of shoes as “flexible pieces of leather” came from Ancient Egypt.
- 3627 BC– Archeologist found the earliest known leather shoe near one of the cave dwellings in Armenia.



- 3rd to 1st millennia BC— Many civilizations around the world used simple leather sandals in their daily life.
- 1st millennia BC— Romans used platform sandals made from wood or cork soles. **Buskin shoes** were also common in Greece and Rome, where they were worn by tragic actors, hunters and soldiers.



- Around 1000 AD – Shoes and sandals become commonplace across Europe, but they are often crude and hard to wear for long periods of time..
- 12th and 13th century – Fashionable shoes started being produced for nobility and royalty.
- 1533 – Italian noblewoman Catherine d’Medici introduced to France **fashion of high heels**.
- 1789 – French Revolution brought to the end the fashion of high heeled man and female footwear, and popularized more “down to earth” designs.

- 1790 – English inventors introduced **shoelaces for the first time.**
- 1800 – In 19th century shoes finally became made for each foot individually.
- 1883 - African-American inventor Jan Ernst Matzeliger invented **machine for automated production of shoes.** This invention changed the shoe industry forever.

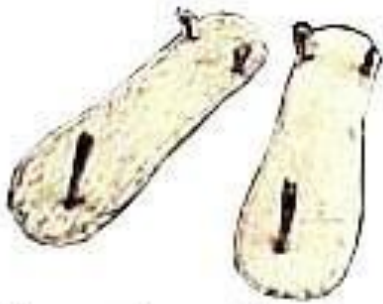
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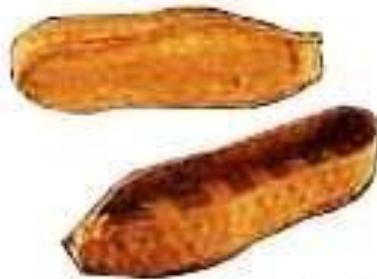
- 1888 – First high heeled shoe factory opened in United States. This event enabled US females to largely abandon import of expensive shoes from France.
- 1899 – Irish-American inventor Humphrey O'Sullivan successfully **patented rubber heel for shoes.**
- 1917 – First successful sneakers (canvas top design with rubber sole) started being sold in United States.
- 1980 – Athletic shoes that were first introduced in early 20th century became widely popular across the world.

FOOTWEAR PICTURE OF DIFFERENT PERIOD OF AGES

- World's oldest leather shoe discovered in Armenia



White wooden sandals made for journey to the afterlife, Egyptian, 2,500 BC



Funerary shoes made of palm leaves Thebes, Egypt 1300 – 1500 BC



Bronze statue fragment of foot and caliga sandal, Roman, 100 AD



Marble statue fragment of foot and caliga sandal, Roman, circa 100 BC



Red shoes decorated with gold, Coptic, Achmin Panopolis, Egypt 200 AD

Modern footwear



Silk evening boots,
French, circa 1914



Leather pumps with instep straps,
English, circa 1925



Reptile leather platform pump,
Belgian, circa 1946



White leather shin-high boots,
by Courège
French, 1964



Leather platform Oxfords,
Spanish, circa 1973



Air More Uptempo sports shoe,
American, circa 1996

The Oldest Shoes

- The oldest shoes recovered to date are sandals found at several [Archaic](#) (~6500-9000 years bp) and a few [Paleoindian](#) (~9000-12,000 years bp) sites in the American southwest.
- Dozens of Archaic period sandals were recovered by Luther Cressman at the [Fort Rock site in Oregon](#), direct-dated ~7500 BP.
- Fort Rock-style sandals have also been found at sites dated 10,500-9200 [cal BP](#) at Cougar Mountain and Catlow Caves.

Evidence for Shoe Use

Prehistory

- Earlier evidence for shoe use is based on anatomical changes that may have been created by wearing shoes.
- Erik Trinkaus has argued that wearing footwear produces physical changes in the toes, and this change is reflected in human feet beginning in the Middle Paleolithic period.

Stone Age China

Seven thousand years ago, people in China's northern provinces made leather shoes by binding sections of skins to their feet using leather strips and bone needles, while at the same time, the people in the eastern regions made shoes using flax thread and bamboo needles. The oldest pair of boots unearthed in China, made from sheep skin, belonged to a woman buried four thousand years ago.

Straw Sandals

Straw sandals are one of the earliest styles of shoes worn by Chinese people. Today, millions of Chinese wear the same straw shoe their ancestors wore thousands of years ago.



Zhou Dynasty

Clothing on unearthened terra-cotta military figures from this period shows the same style of stitched soles on handmade cloth shoes still worn in China today. Stitch-soled cloth shoes developed over two thousand years ago specifically for the Chinese military.

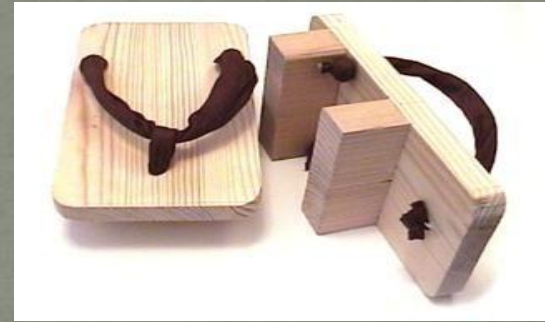
Qing Dynasty

During the Qing Dynasty (1644-1911 C.E.), the pointed toe boot adorned feet for everyday wear. Attending court functions required wearing the square-toed boot. Chinese history saw the last of this style shoe with the downfall of the last ruling emperor of China--Emperor Xuantong--in 1911.



Geta

Geta are Japanese sandals made of straw and wood. The shoes resemble thong sandals that have a sole and platform fashioned from wooden blocks. Geta are often made with a flat, wooden sole and two supports, which are perpendicular to the sole. The straps can be made from straw or cloth. The geta were originally designed for workers in rice fields and helped elevate the feet above water and mud. These traditional sandals are still worn in contemporary Japanese culture and are frequently paired with kimonos.



TYPES OF FOOTWEAR IN MODERN HISTORY

- There are a wide variety of different types of shoes. Most types of shoes are designed for specific activities.
- **Athletic**
- **Boot**
- **Dress and casual-** Dress shoes are characterized by smooth and supple leather uppers, leather soles, and narrow sleek figure. Casual shoes are characterized by sturdy leather uppers, non-leather outsoles, and wide profile.
- **Unisex**
- **Dance**
- **Orthopedic**
- **Non-human**

Industry Overview

- ❖ The Indian footwear retail market is expected to grow at a CAGR of over 20% for the period spanning from 2008 to 2011.
- ❖ Footwear is expected to comprise about 60% of the total leather exports by 2011 from over 38% in 2006-07.
- ❖ The major production centers are Chennai, Ranipet, Ambur in Tamil Nadu, Agra and Delhi.
- ❖ By products, the Indian footwear market is dominated by casual footwear market that makes up for nearly two-third of the total footwear retail market.
- ❖ The Indian footwear market scores over other footwear markets as it gives benefits like low cost of production, abundant raw material, and has huge consumption market.

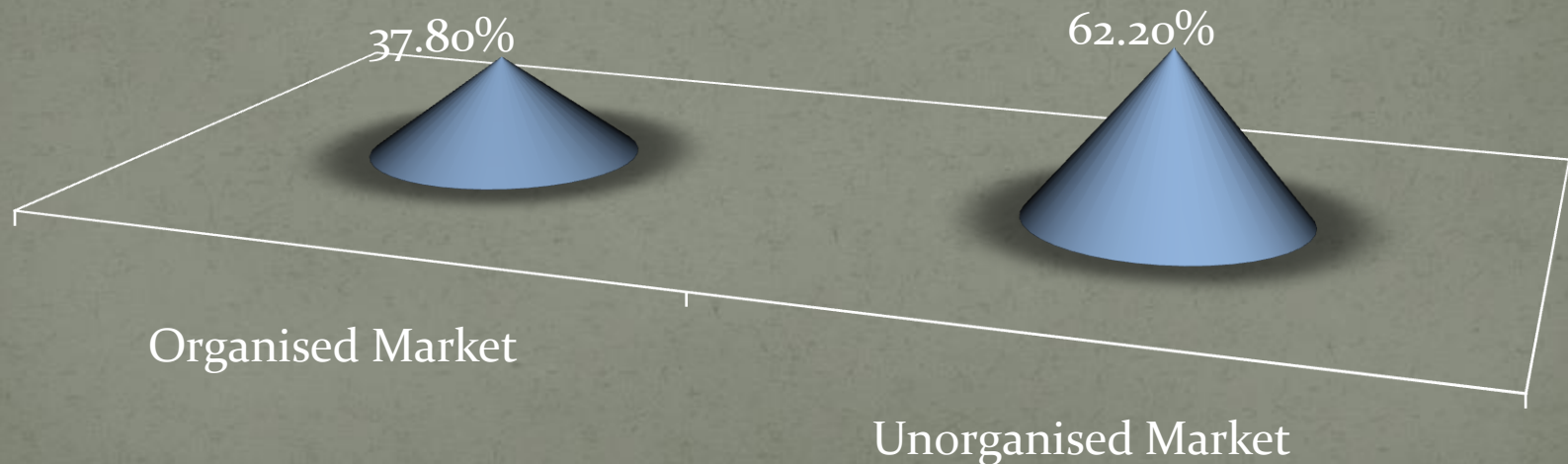
Industry Overview

- ❖ The estimated annual production capacity of Leather Shoe Uppers is 112 million pairs
- ❖ ❖ India's export of Footwear Components touched US\$ 229.49 million in 1999-2000, holding a share of 15% in India's total export of leather and leather products. Nearly 75% of the total export of footwear components is from the Southern Region, followed by the Northern Region, with a share of 13%.
- ❖ ❖ The major markets for Indian footwear components are the U.K., Germany, Italy, the USA, France, and Portugal. Nearly 83% of India's export of footwear components is to the above countries.
- ❖ India is often referred to as the sleeping giant in footwear terms. It has an installed capacity of 1,800 million pairs, second only to China.

Organized Sector vs. Unorganized Sector

- ❖ The Indian footwear market is estimated to be worth Rs.13,750 Crore and constitutes just about one percent of Indian retail.
- ❖ The ladies footwear segment still remains the most untapped as nearly 80-90 percent purchases happen in the unorganized market

Indian Footwear Market



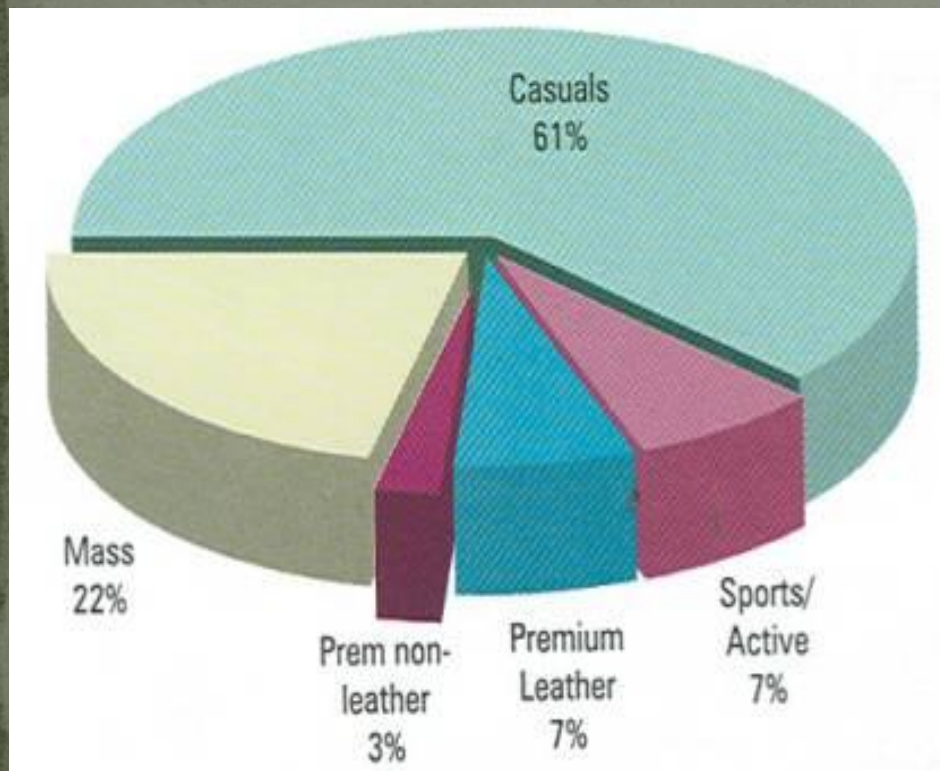
Source: Indian Retail Report 2008-2009

Actual Exports & Target of the Leather Industry In India

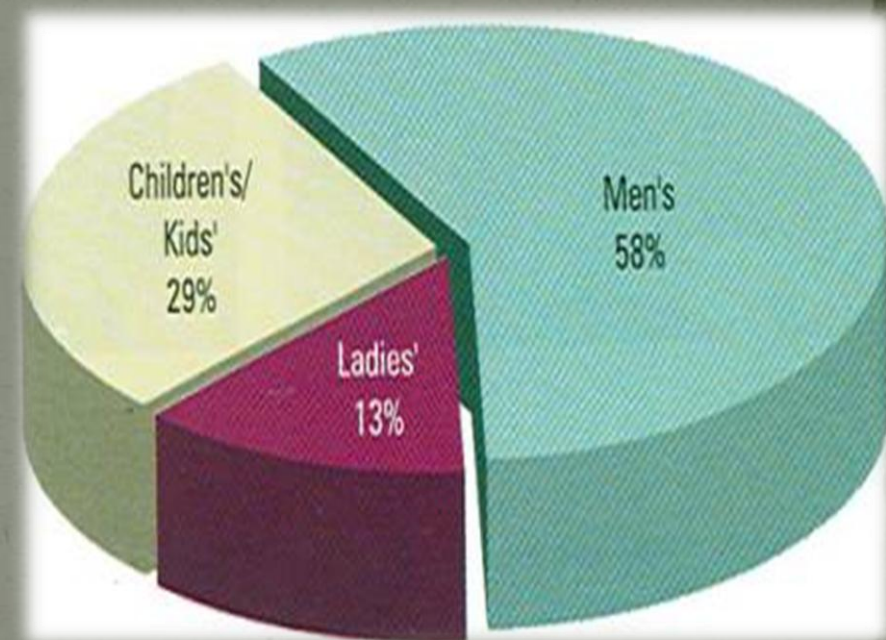
Product	2006-07	2007-08	2008-09	2009-10	2010-11
(In Million US\$)	Actual Export	Actual Export	Actual Export		
Leather	688.05	726.85	785.00	847.80	915.63
Footwear	1212.25	1967.88	2597.60	3428.83	4526.05
Garments	308.98	358.53	372.87	387.78	403.30
Leather Goods	690.66	733.34	798.69	870.06	948.04
Saddlery & Harness	81.85	105.66	127.85	154.70	187.19
Total	2981.79	3892.26	4682.01	5689.17	6980.21

Market Share in the Footwear Industry

Volume Share of Products Segments in Footwear



Volume Share in Footwear

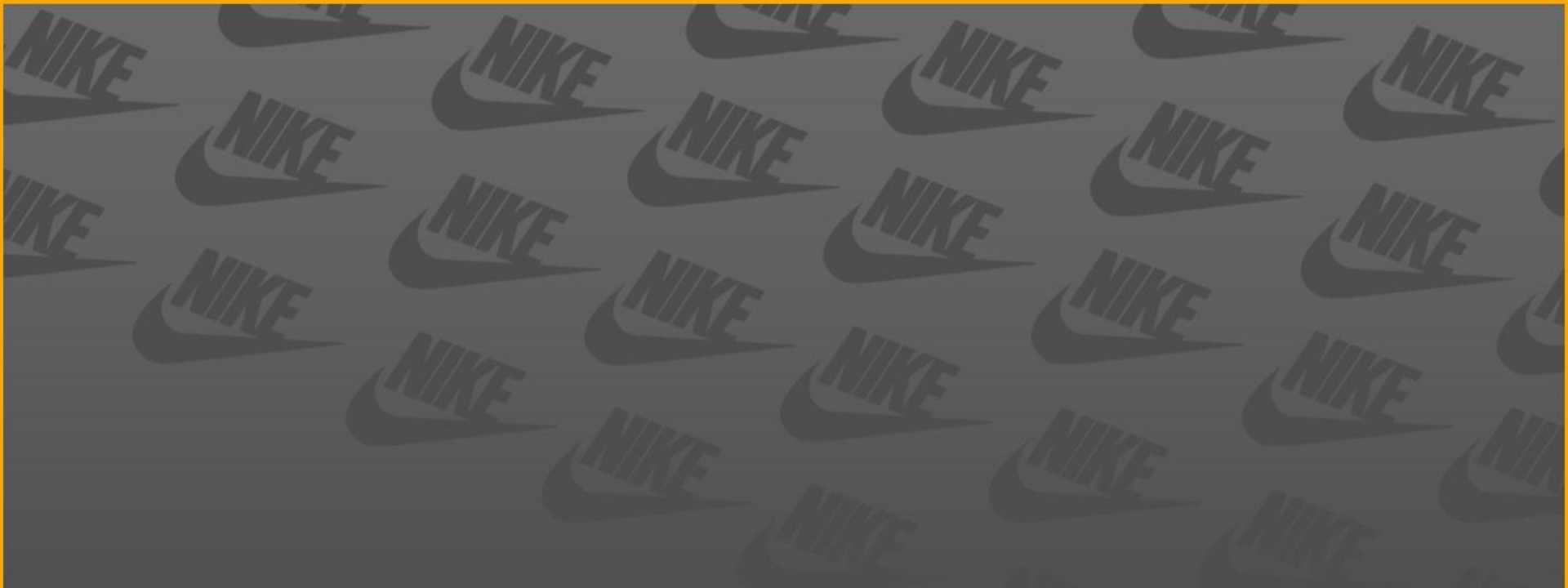


Major Players in Shoe Market



Adidas v/s Nike

Parameters		
Brand	founder Adolf "Adi" Dassler	Goddess of Victory
Owners	Reebok, Taylor Made golf company and Rockport	Umbro, Hurley, Converse and Cole Haan
Technologies	Adiprene, Torsion, Ground Control System (GCS), Climacool	Zoom Air, NIKEiD, Waffle Sole, Max Air, Independent Podular Suspension (IPS)
Motto	"Impossible is nothing"	"Just do it."
Pricing	Adidas products are generally cheaper than Nike products	Nike seems to have the upper hand in



INTRODUCTION



- Nike is a American Multinational corporation
- It is engaged in designing and worldwide marketing and selling of footwear, apparel, equipment and accessories
- Nike is the world's leading supplier of Athletic Shoes and apparel and also a major manufacturer of sports equipment.
- It was founded on May 30 ,1978 by Bill Bowerman and Phil Knight.
- Nike in Greek means Goddess of Victory.

SLOGAN OF THE LOGO

- SLOGAN “JUST DO IT”
- The slogan was coined in 1988 at an ad agency meeting.



HISTORY OF LOGO



- The Nike "Swoosh" is a design created in 1971 by Carolyn Davidson, a graphic design student at Portland State University. She met Phil Knight while he was teaching accounting classes and she started doing some freelance work for his company, Blue Ribbon Sports (BRS).
- The Nike design logo was originally taken from the Greek mythological Goddess (Nike) as one of her wings. The ideology was that the goddess Nike was actually a symbol of victory. Hence conceptually the Nike logo design meant victory or winning.
- Nike logo is also known as Nike Swoosh.



SIGNIFICANCE OF THE LOGO



- ✓ Logo represents the wing of Greek Goddess.
- ✓ The word NIKE means goddess of victory.
- ✓ The Nike logo design is an abstract wing, designed by Carolyn Davidson, was an appropriate and meaningful symbol for a company that marketed running shoes



Welcome to Liberty

Training Agenda



Introduction	
Retail sensitization	Factory Visit
Importance of customer service	Manufacturing Process
Types of shoes and materials	Shoe Care Inputs
Basic foot anatomy and foot mechanics	Customer Facilitation skills
International footwear trends & design process	Store operations procedures
Collections and Brands	

Types of Shoes and Materials



1. **Parts of a Shoe**
2. **Footwear Types**
3. **Footwear Materials**

Parts of a shoe



COUNTER(THE BACK PORTION)

TONGUE

QUARTER (THE MIDDLE BACK PORTION)



THROAT

TOE CAP

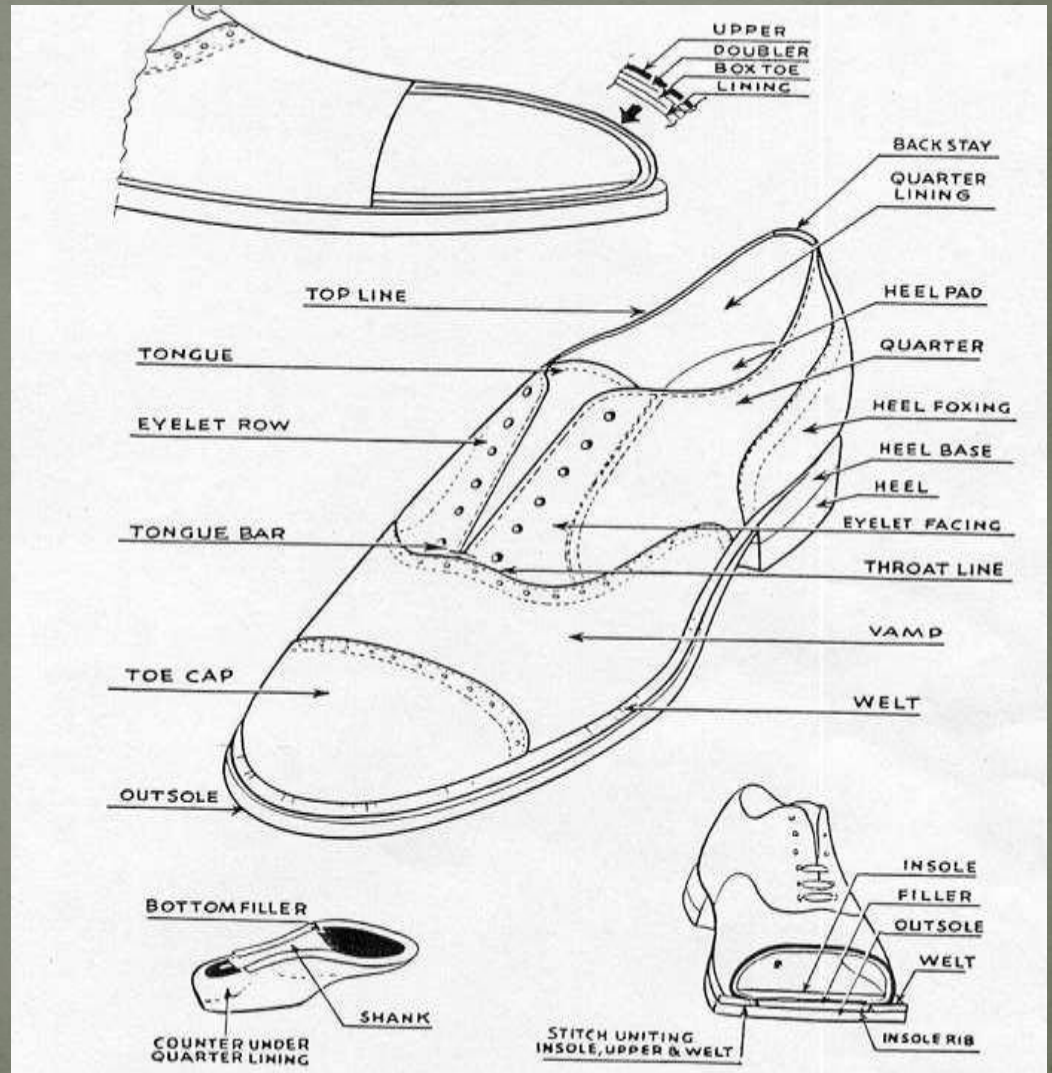
HEEL

STITCH JOINING QUARTER AND VAMP

VAMP (THE ENTIRE FRONT LEATHER PORTION)

OUT SOLE

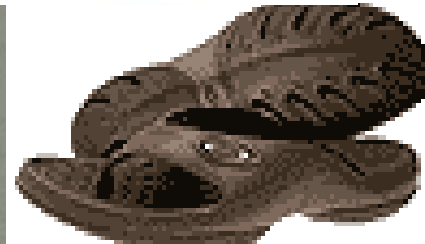
Parts of a Shoe



Men's Casual



- Casuals shoes typically
 - Heavy soled
 - Shine lesser than formal shoes
 - Types of casual shoes are
 - **Boat shoe**
 - **Casual derby**
 - **Monk shoe**
 - **Boots**
 - **Anklets**



Women's Shoes



Thigh high boots



Knee high boots



Wellington boots



Cowboy boots



Ugg boots



Timberland boots



Gladiator boots



Bondage boots



Wedge booties



Dr. Martens



Chelsea boots



Crocs



Lita



Gladiators



Clogs



Mules



Slingbacks



Monk



Loafer



Converse



Oxford



Ballerina flats



Slip-on



Moccasin



Dockside



Cone Heel



D'orsay



Ankle Strap



T-Strap



Open toe



Wedge



Chunky Heel



Jelly



Stiletto



Kitten Heel



Platform



Peep toe



Pump



Scarpin



Mary Janes



Flip flops



Exercise

- Based on heel height, classify the shoes into the following Usage/ occasion:
- Formal/ Office
- Dress/ Evening
- Out-of-Home/ Leisure
- Sports

A



B



C



D



Heel Height:

Flats : Typically below 1.5”

Mid Heel : Between 1.5 – 2.5”

High: Greater than 2.5”



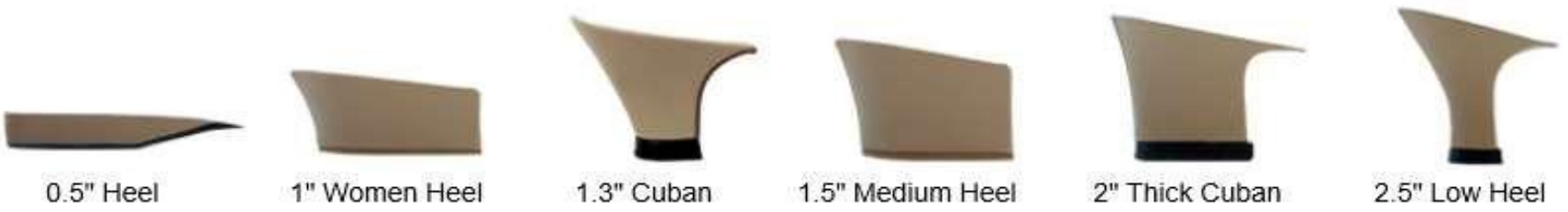
Supadance:



Dance Naturals:



Very Fine:



Kids Shoes



- - **Party (more embellishments, distinct colours for boys and girls)**
 - **Casual (unisex colours and styling, including sports shoes)**

- **Kids footwear Unisex for casual wear (bright colours, funky styles and embellishments), party wear demarcated between boys and girls**

- **Three broad types of Footwear (both boys and girls)**
 - **Laced**
 - **Sandals**
 - **Slip-ons**

Kids Shoes

Slip -Ons

Sandals

Laced

Casual



Party





- ❖ Incorporated as Bata Shoe Company Private Limited in 1931, the company was set up initially as a small operation in Konnagar (near Calcutta) in 1932



- ❖ Bata India is the largest company for the Bata Shoe Organization in terms of sales pairs and the second largest in terms of revenues

- ❖ Bata India Limited is the largest footwear retailer in India.

- ❖ Bata India has more than 1250 stores across the Country

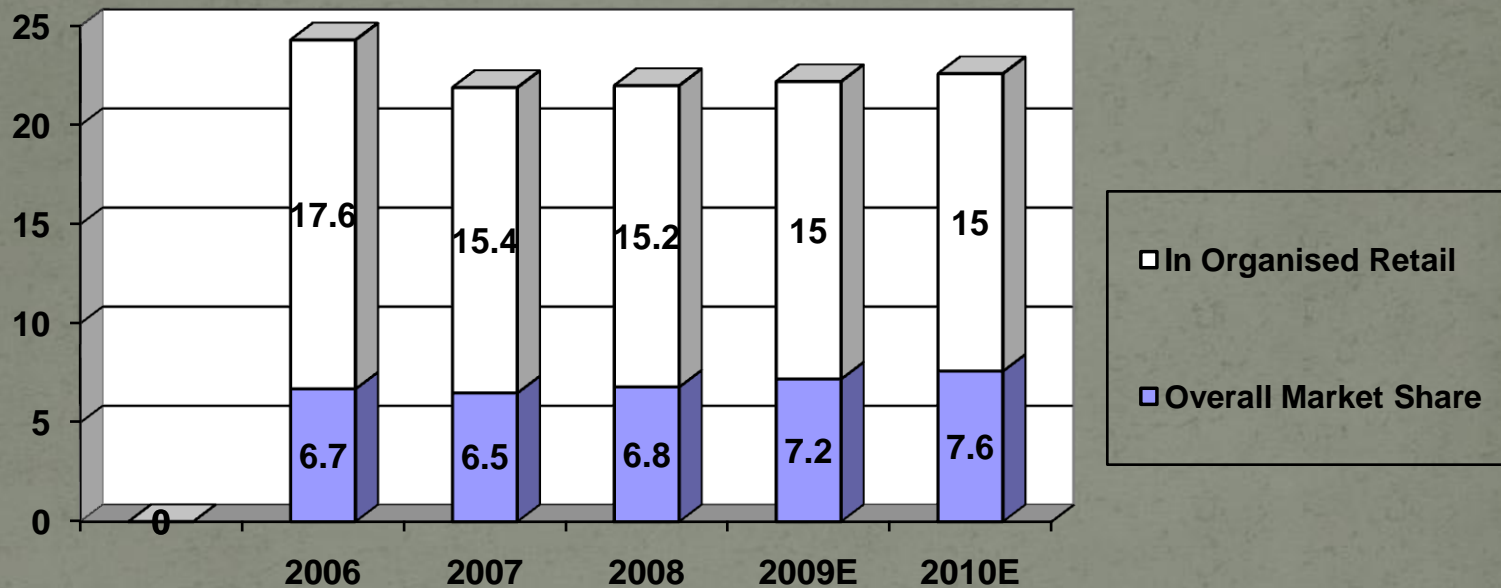
- ❖ Corporate office: **Gurgaon**

- ❖ CEO: **Mr. Thomas G Bata**





Improving Market Share



Bata today...

Serves 1 million customers per day

Employs more than 40,000 people

Operates 5000 retail stores

Manages a retail presence in over 50 countries

Runs 40 production facilities across 26 countries



Marketing Strategy of

- ❖ Bata is reinventing itself and has introduced the concept of flagship stores to provide complete and unique shopping experience at par with their stores abroad.
- ❖ International trends, relaxed ambience, great products, and courteous staff at the new-look Flagship store are all a part of Bata's new marketing strategy.
- ❖ Reposition brand 'Bata' - High brand recall for consumer lead to higher footfalls and better conversions
- ❖ Target new market (ladies and kids) - Filling the missing 45% pie of footwear market
- ❖ Improving shoe line - Launching international brands, focus on style will attract new young customer class

Major retail outlet of



□ India's first exclusive Hush Puppies outlet at Hyderabad



□ 10,000 sq ft Mega Store at Vadodara

□ Bata India limited Behrampur



Overview

The Bata logo is written in a red, italicized, serif font.

Market segment	low to medium priced footwear for the common person across the globe
Local Strategy	Bata runs semi-autonomous companies targeted at the low to medium end of the scale.
Marketing Approach	Bata clusters countries geographically into groups; the expatriate would build regional specialization & training activities would be more relevant on a regional basis for similar counties
International strategy	Bata follows a multi domestic strategy. It stands for low integration across country units & high local responsiveness



Product Offerings



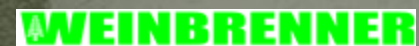
Bubblegummers is the leading children's footwear brand for the 0 to 9 olds that assure the healthy growth of a child's foot.



Power embodies diversity with ranges in running, training, court, basketball, football and Outdoor that combines function with creativity



Marie Claire shoes are for women with an active lifestyle who seek contemporary modern styles.



The Weinbrenner line is made up of leather shoes and boots, low, mid and high cut



Its characteristics such as double stitching, massage insole, latex foam insole, soft textile are used to emphasize the brand image both for comfort and style.

Product Offerings



DR.SCHOLL

The ribbed surface of the insole gently massages your feet while walking. This boosts the circulation And keeps you active all the day. The soft sole absorbs all the shocks while walking.



NORTH STAR

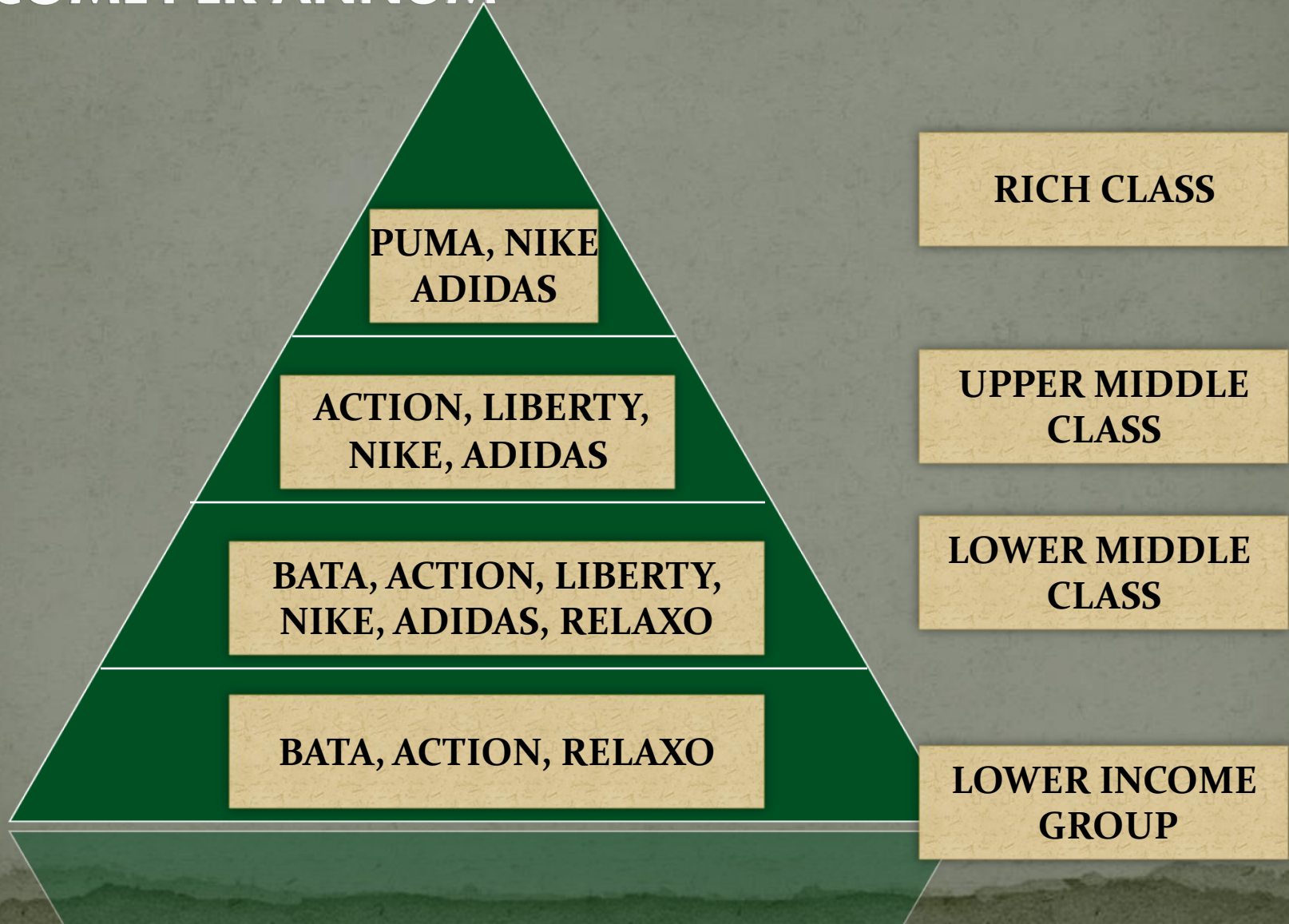
It's a casual yet fashionable street-style shoes that caters to the young at heart.



Hush Puppies[®]

Hush Puppies emerged world's first casual shoe
It is soft, breathable and very comfortable shoe.
Known for technology.

COMPANIES TARGETING THE CONSUMERS BASED ON INCOME PER ANNUM



Challenges in the Indian Footwear sector

- ❖ Low quality of shoes – threat of shift in production to other areas or countries where wages levels are low if the quality is maintained at same level
- ❖ Most companies work on subcontract basis – design, component selection and methods of production are given by the buyers and do not provide their own fashion collections, however companies are able to make prototypes based on ideas provided by the buyer
- ❖ Strong requirement to increase quality as well as quantity
- ❖ Availability of right raw material (finished leather) at right time
- ❖ Under developed designs for footwear components sector
- ❖ Meeting manpower requirement under the state of affairs of rapid industrialization

Opportunities in the Indian Footwear Industry

- ❖ Abundant scope to supply finished leather to multinationals setting up shop in India
- ❖ Growing fashion consciousness globally
- ❖ Use of information technology and decision support software to help eliminate the length of the production cycle for different products
- ❖ Product diversification - There is lot of scope for diversification into other products, namely, leather garments, goods etc
- ❖ Growing international and domestic markets
- ❖ Aim to present the customer with new designs, infrastructure, country & company profiles
- ❖ Exhibit strengths in manufacturing, for example, strengths in classic shoe manufacturing, hand crafting etc

CONCLUSION

- The power of footwear is extraordinary, from its function as an incredibly important cultural identifier to its ability to communicate with the spirit world.

Thank You.....

Group Members

Name	

Webliography

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- Wikipedia