

MARKET PROFILE

**Footwear, outer soles of rubber/plastics uppers of leather, nes
TO
GERMANY**



Bangladesh

June 2015

Market Profile

SMEs face difficulty in identifying potential and existing export market of a particular product. As a result, with comparative advantage in terms of raw materials or labor force, SMEs are unable to exploit these advantages by targeting a prospective foreign market. Market Analysis tools of International Trade Centre (ITC) help to identify export market opportunities. It provides data and information on international trade trends, national export performance, export markets and help to analyze market in depth. SME Foundation has taken an initiative to prepare product-wise market profile using Market Analysis Tools and Market Profile Template developed by ITC. The main objective of the project profile is to guide and help the SME entrepreneurs to analyse international market of their products.

This market profile provides data, information and analysis of a exportable product which includes HS code, production, consumption, world import and export, annual growth in value and quantity, demand and supply analysis, country trade performance, Time series analysis, graphical analysis, market screening, identify potential attractive market, competitor analysis, tariff advantage in potential markets, target market selection, PEST analysis, market access (Tariff and non-tariff measures), packaging & labeling regulations, price, distribution channels, promotion, buyer list and many other issues.

Although, the material included in this document is based on data/information gathered from various reliable sources; however, it may differ from case to case. As the data are dynamic, it is changing frequently. Further study and in some cases professional advice are required before taking any decision to act upon the information. The actual results may differ substantially from the presented information due to various factors. SME Foundation does not assume any liability for any financial or other loss resulting from this document.

The annual data in this market profile is based on COMTRADE, the world's largest trade database maintained by the United Nations Statistics Division, and monthly or quarterly data are collected by ITC from national custom offices or regional organizations. The market access data is directly retrieved from the Market Access Map application.

Prepared by:



SME Foundation

Royal Tower, 4 Panthapath, Dhaka-1215
Phone: +88 02 8142983, 9142907, 09669300001-4
Fax: +88 02 8142467
E-mail: info@smef.org.bd
Website: www.smef.org.bd

Market Analysis Tools & Market Profile Template Developed by:



International Trade Centre UNCTAD/WTO

Market Analysis and Research
Division of Market Development
54-56 rue de Montbrillant
Palais des Nations, 1211 Geneva, Switzerland

Table of Contents

	Executive Summary	4
A	Product Description	5
A.1	Definition and description of product and its application(s)	5
A.2	Production	5
A.3	Consumption	7
B	Global Trade Overview	8
B.1	World Trade characteristics for selected product	8
B.2	World imports characteristics	8
B.3	World export characteristics	9
C	Country trade performance for your selected product	10
C.1	Your country's export performance for selected product in the world market	10
C.2	Tariff faced by Bangladesh in the world	11
C.3	Graphic Analysis	12
D	Market Screening	14
D.1	Identify attractive potential markets	15
D.2	Target Market Selection	16
E	PEST Analysis	17
F	People & Product	18
G	Permission: Market Access	19
H	Packaging and Labelling Regulation	20
I	Price	21
J	Placement: Distribution Channels	21
K	Promotion	22
L	Potential Prospects	23

Executive Summary

This market profile reviews the **Germany** market for **Footwear, outer soles of rubber/plastics uppers of leather, nes** and its future prospects for new suppliers entering the market. The purpose of this market profile is to guide possible new entrants into the **Footwear, outer soles of rubber/plastics uppers of leather, nes** market.

The Germany market for Footwear, outer soles of rubber/plastics uppers of leather, nes is a growing significantly in the last few years.

A total of 29,819 million US\$ of this products is imported and 30,642 million US\$ of this product is exported in the world in 2014.

The demand for Footwear, outer soles of rubber/plastics uppers of leather, nes has been increased. Annual growth of world import is increased by 1 % between 2010-14. USA, Germany and Hong Kong, China are the largest importer of this product.

Bangladesh already exports this product. Export earnings from spices was US\$ 225 million in 2014. Bangladesh is winning market share in the world market. Annual growth rate (in value) of Bangladesh was 17% in 2010-2014 while world average growth rate was 3%. The major importing countries are: Japan, Germany, Italy, Netherlands, USA, Hong Kong, China, UK, France, Poland and so on.

Germany, USA and Netherlands are the attractive markets for the Footwear, outer soles of rubber/plastics uppers of leather, nes exported by Bangladesh. Among these countries, Germany has been selected as target market for this market profile for the following reasons:

- Germany is the 2nd largest importing market of footwear commanding 8.3% share of world imports.
- Germany is the 2nd largest importer of this product from Bangladesh (19.3% share in Bangladesh's export) .
- Germany import has grown by 1% over the last 5 years in the world.
- Germany is a growing market for Bangladeshi footwear over the last 5 years (32% growth in value).
- There is a prospect for market diversification of Bangladeshi footwear in the Germany market (bubble graph).
- Tariff applied by Germany to Bangladesh is 0% for this product.

A. Product Description

This market profile illustrates the Germany market for **Footwear, outer soles of rubber/plastics uppers of leather, nes** and is intended for the use of producers and exporters of **Footwear, outer soles of rubber/plastics uppers of leather, nes** in Bangladesh.

A.1 Definition and description of product and its application(s)

- Perhaps as little as a century ago, footwear use outside of the home was ubiquitous only in economically advanced countries. Now it is almost universal. Even in the world's poorest countries, only remote small sub-populations remain barefoot. For some the wearing of footwear is used (unknowingly) to continue an ancient decorative tradition of using foot ornaments as a fashion statement or to signify social class.
- Traditionally German people mostly buy a new pair of shoes out of necessity and regard comfort more important than fashion.
- Product Groups: Casual footwear, Sports footwear, Formal footwear, Evening footwear.

HS code

Specific codes to identify the product category are as follows:
HS (Harmonized System) Code¹:

4-digit HS: 6403 6-digit HS: 640399

A.2 Production

World production

According to the World Footwear Yearbook the production of footwear in 2010 was 20 billion pair. The production of footwear in 2013 crossed the 22 billion pair threshold for the first time.

China alone produces more than 62% of the world total. Its regional neighbours India, Vietnam, Indonesia, Pakistan, and Thailand are also among the top 10 world producers, producing another 20% of the total. Outside Asia, Brazil is the most important producer, with 4.4%. Mexico, Italy, and Turkey are also among the world's most significant manufacturers. Together, these ten countries account for 90% of the world footwear production.

¹ HS Codes are internationally standardized names and numbers that classify traded products that are developed and maintained by the World Customs Organization (WCO). The WCO is an independent organization of 160 countries based in Brussels, Belgium. The HS system represents almost 98 percent of world trade, which includes 200 countries. www.wcoomd.org

Rank	Country	Pairs (millions)	World Share
1	China	12 597	62.4%
2	India	2 060	10.2%
3	Brazil	894	4.4%
4	Vietnam	760	3.8%
5	Indonesia	658	3.3%
6	Pakistan	292	1.4%
7	Thailand	245	1.2%
8	Mexico	244	1.2%
9	Italy	203	1.0%
10	Turkey	174	0.9%

Table 1 - Top 10 Footwear Producers (quantity) 2010

Source: World Footwear Year Book 2011

Manufacture of footwear is heavily concentrated in Asia, as can be seen in Chart 1, this continent now produces 87% of all the pairs of shoes produced worldwide



Chart 1 - Distribution of Footwear Production by Continent (quantity) 2010

Bangladesh production

Footwear production of Bangladesh: export oriented footwear 22 million pairs
[Source: 2nd Dhaka Leather Goods Fair–1997, GTZ, Dhaka 1997, page 22]

Export earnings from this sectors was \$550 in FY2013-2014(EPB).

The footwear sector estimates local (approximate) demand of 190 million pairs was made by local footwear manufacturers.

A.3 Consumption

- German consumption of footwear was € 8.6 billion in 2008, or 330 million pairs.
- 4.0 pairs per capita, spending € 104 per year

B. Global Trade Overview

B.1 World Trade characteristics for selected product

B.1.1 How much in total of this product is imported in the world in 2014?

Value imported in 2014 (USD thousand) 29,818,795

B.1.2 How much in total of this product is exported to the world in 2014?

Value exported in 2014 (USD thousand) 30,642,214

B.1.3 Have the world imports grown or declined in the last 5 years? Annual growth in value between 2010-2014 (%)

Annual growth in value between 2010-2014 is 1%.

B.1.4 Is there a difference between the world's growth rate in value and world's growth rate in quantity?

N/A

B.1.5 Approximately how many countries import and export the selected product?

Approximately 210 Countries import and export the product

B.2 World imports characteristics:

B.2.1 which countries are the 3 largest importers (in value in 2014) of the product?

Ranking	Importers	Share in World Imports, %
1	United States of America	22.5
2	Germany	8.3
3	Hong Kong, China	7

B.2.2 What share of world total imports do the 3 main importers make up together? 37.8%

B.2.3 Does this indicate that the world demand for this product is concentrated?

NO

B.2.4 Among the list of top 20 importers (in value) in 2014 is there country for which the trade balance (in value) is positive in 2014. Please account for the possible reasons that could explain this difference.

Name of the countries: Italy, Belgium, Netherlands, China, Spain,

Reason:

Exports > Imports

B.3 World Exports characteristics:

B.3.1 Which countries are the 3 largest exporters (in value in 2014) of this product? What is the value of their exports?

Ranking	Exporters	Share in World Exports, %
1	China	26.9
2	Vietnam	12.2
3	Italy	9.5

B.3.2 What share of world total exports do the 3 main exporters make up together?

48.6%

B.3.3 Does this indicate that the world supply for this product is concentrated?

NO

C. Country trade performance for your selected product

C.1 Bangladesh's export performance for selected product in the world market

C.1.1 Does Bangladesh already export this product? YES

If yes, what is Bangladesh's ranking in world exports and world market share of this product in 2014?

Ranking: 23 World Market Share: 0.73%

C.1.2 How much in total of this product is exported by Bangladesh to the world?

225 million US\$
Quantity: N/A

C.1.3 Is Bangladesh winning or losing market share in the world market?

Bangladesh is winning market share in the world market. Annual growth rate (in value) of Bangladesh was 17% in 2010-2014 while world average growth rate was 3%.

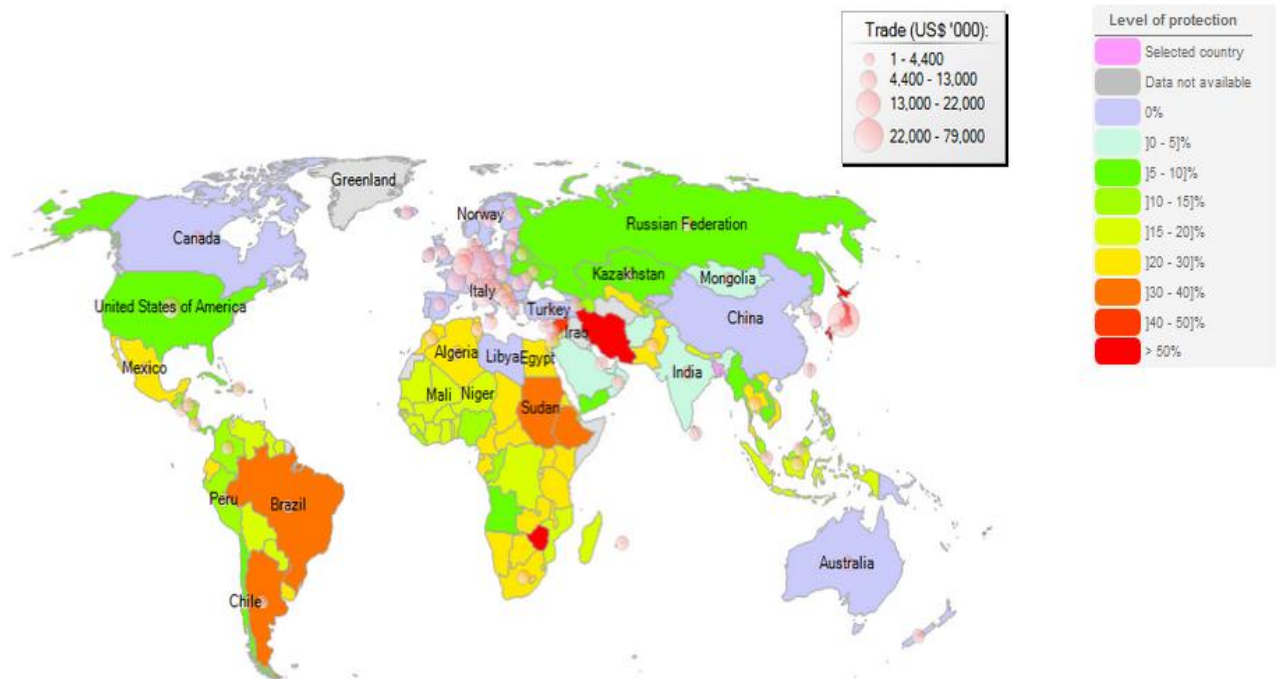
C.1.4 Who are the three biggest importers for your product in 2014?

1. Japan 2. Germany 3. Italy

Importers	Trade Indicators												
	Exported value 2014 (USD thousand)	Trade balance 2014 (USD thousand)	Share in Bangladesh's exports (%)	Exported quantity 2014	Quantity unit	Unit value (USD/unit)	Exported growth in value between 2010-2014 (% , p.a.)	Exported growth in quantity between 2010-2014 (% , p.a.)	Exported growth in value between 2013-2014 (% , p.a.)	Ranking of partner countries in world imports	Share of partner countries in world imports (%)	Total import growth in value of partner countries between 2010-2014 (% , p.a.)	Tariff (estimated) faced by Bangladesh (%)
Total	224849	219306	100	0	No quantity		17	3	9		100	1	
Japan	71639	71639	31.9	2960	Tons	24202	16	7	-8	9	2.9	10	94
Germany	43493	43493	19.3	0	Mixed		32		39	2	8.3	1	0
Italy	12250	12250	5.4	671	Tons	18256	0	-9	-13	6	5	-5	0
Netherlands	10101	10101	4.5	0	Mixed		44		49	10	2.8	-2	0
United States of America	10077	10077	4.5	261	Tons	38609	19	13	-16	1	22.5	0	6.4
Hong Kong, China	7691	7622	3.4	199	Tons	38648	215		11	3	7	-4	0
United Kingdom	7571	7570	3.4	306	Tons	24742	8	-6	42	4	6.3	0	0
France	7544	7544	3.4	263	Tons	28684	-15	-11	-27	5	6	1	0
Poland	7068	7068	3.1	409	Tons	17281	62	68	410	18	1.1	8	0
Russian Federation	4740	4740	2.1	137	Tons	34599	98	102	30	8	3.2	-4	6.6

C.2 Tariff faced by Bangladesh in the world

- Tariff faced by Bangladesh in the world.
- Geographical distribution for tariffs applied by all importing countries to **Bangladesh**
- Product: **640399 - Footwear, outer soles of rubber/plastics uppers of leather, nes**
- Trade year: **2013**
- Applied tariff data source: **ITC (MAcMap) complemented by WTO (IDB)**
- Trade data source: **ITC Normalized trade matrix**
- AVE Methodology: **AVE based on the World Tariff Profile (WTP)**



C.3 Graphic Analysis

Time Series Data

List of importing markets for a product exported by Bangladesh ⁱ
 Product: 640399 Footwear, outer soles of rubber/plastics uppers of leather, nes
 The product code selected above has been reallocated in the 2007 HS revision.

Unit: US Dollar thousand

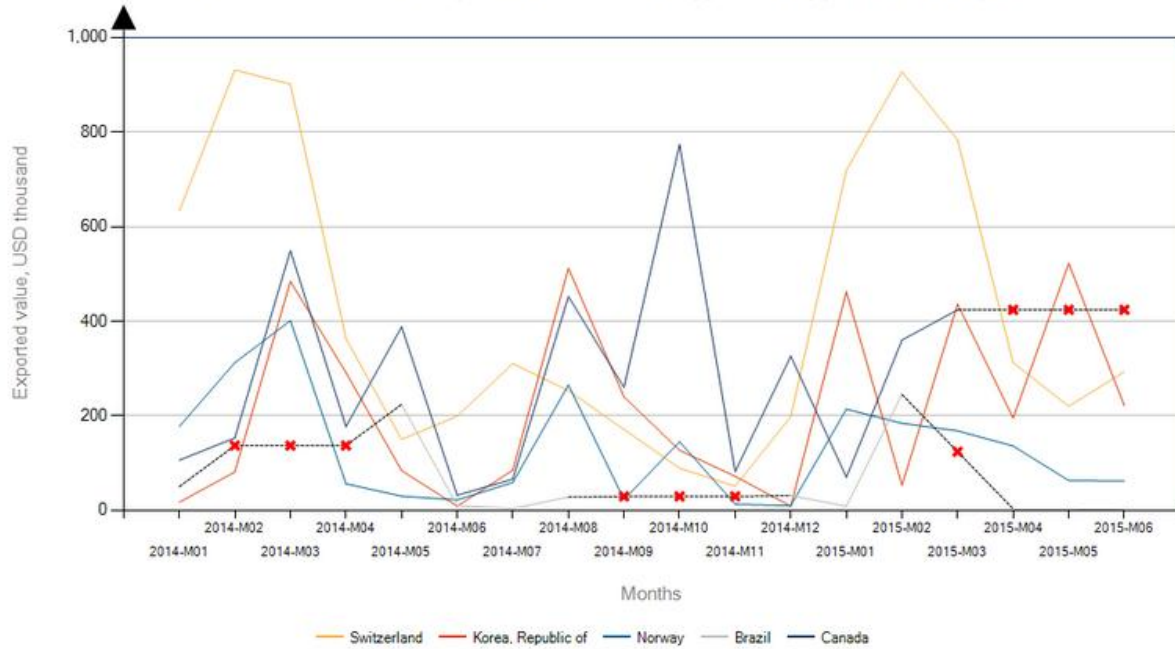
Table Graph Map Companies

Download:

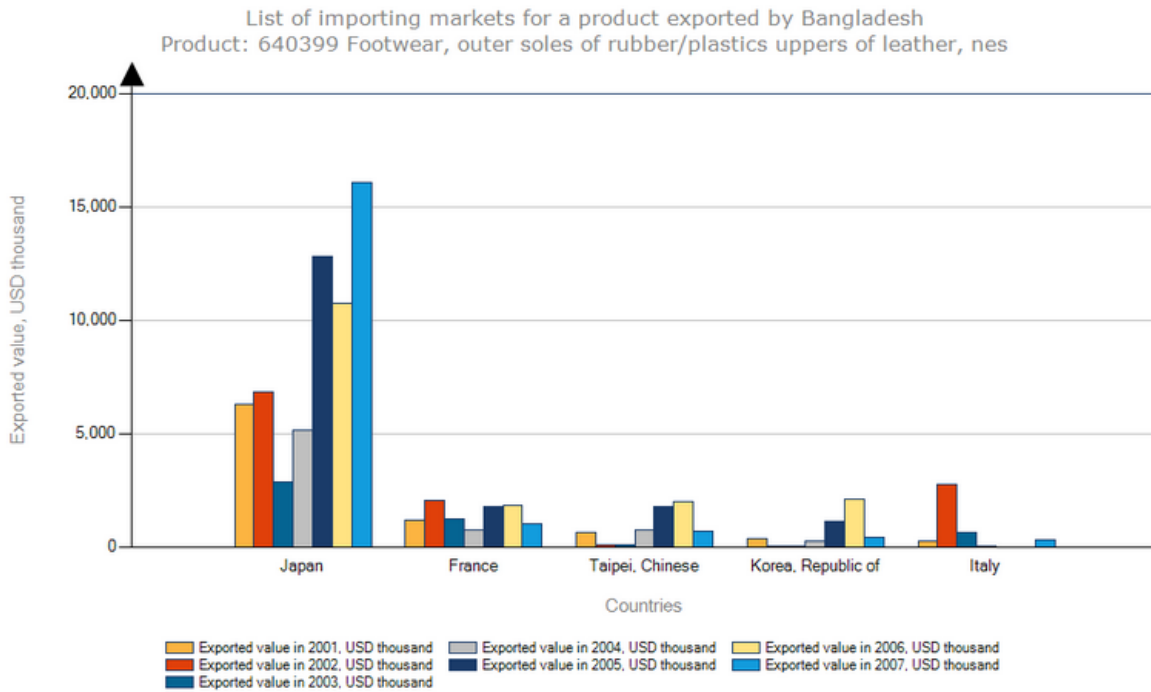
Time Period (number of columns): 5 per page Rows per page: Default (25 per page)

Bilateral 8 digits	Importers	Exported value in 2007	Exported value in 2008	Exported value in 2009	Exported value in 2010	Exported value in 2011
	World	19,084	26,787	37,456	53,027	134,355
<input type="checkbox"/>	Japan	16,083	17,956	26,449	36,698	33,331
<input type="checkbox"/>	Germany	0	1	372	1,102	26,527
<input type="checkbox"/>	United States of America	2	239	183	621	14,973
<input type="checkbox"/>	Italy	289	104	663	2,186	12,670
<input type="checkbox"/>	Netherlands	49	129	212	1,709	11,088
<input type="checkbox"/>	France	995	1,504	1,424	2,022	5,208
<input type="checkbox"/>	Switzerland	0	5	52	11	4,071
<input type="checkbox"/>	Austria	54	0	0	20	3,597
<input type="checkbox"/>	Korea, Republic of	415	2,184	3,080	2,885	3,596
<input type="checkbox"/>	Canada	0	0	323	529	2,983
<input type="checkbox"/>	Belgium	107	51	78	55	2,898

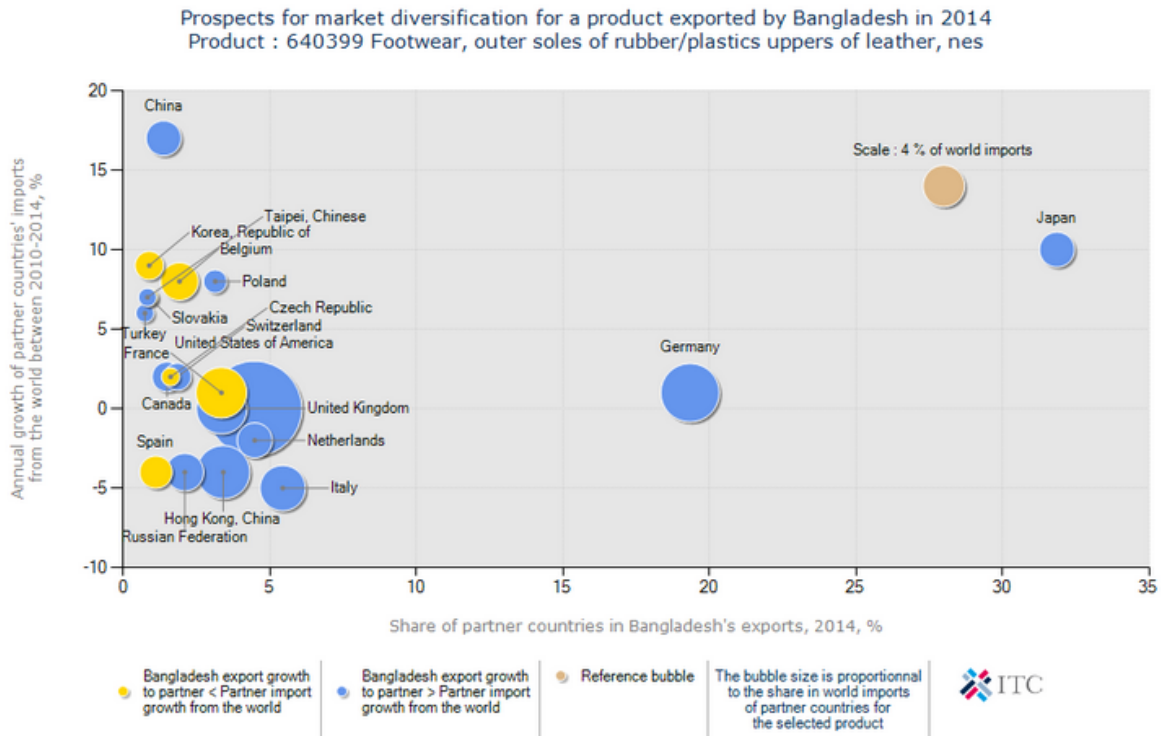
List of importing markets for a product exported by Bangladesh (Mirror)
 Product : 640399 Footwear, outer soles of rubber/plastics uppers of leather, nes



Bar chart



Bubble graph



Note: When Bangladesh export growth to partner < Partner import growth from the world
That means Bangladesh is losing market share in partner countries

D. Market screening

Which importing countries have the highest imported value in 2014? And what are their respective annual growth rates in value and in quantity between 2010 and 2014, share in world import and Average tariff?

Sl	Importing country	Imported value in 2014 (millions USD)	Annual growth in value between 2010-2014, %"	Annual growth in quantity between 2010-2014, %"	Share in World Imports (%)	Average tariff (estimated) applied by the country (%)
1	United States of America	6720	0	-5	22.5	4.6
2	Germany	2462	1	-2	8.3	2.1
3	Hong Kong, China	2093	-4		7	0
4	United Kingdom	1888	0	-5	6.3	2.1
5	France	1799	1	-7	6	2.1
6	Italy	1499	-5	-13	5	2.1
7	Belgium	991	8		3.3	2.1
8	Russian Federation	940	-4	-7	3.2	13.3
9	Japan	866	10	5	2.9	115.6
10	Netherlands	844	-2	-9	2.8	2.1

Which countries would you consider as potential attractive markets for the footwear exported by Bangladesh?

- | |
|--|
| <ol style="list-style-type: none"> 1. Germany 2. USA 3. Netherlands |
|--|

D.1 Identify attractive potential markets

D.1.1 Which are three attractive markets for exporting this product?

	Target Country	Value Imported (million \$)	Unit Value (US\$/unit)	Annual Growth Rate in value 2010-14 (%)	Annual Growth Rate in quantity 2010-14 (%)	Share in World Imports (%)	Average tariff (estimated) applied by the country (%)
1	Germany	2462	36688	1	-2	8.3	2.1
2	USA	6720	38634	0	-5	22.5	4.6
3	Netherlands	844	33936	-2	-9	2.8	2.1

D.1.2 Who would be your main competitors in these countries and why?

	Target Country	Your country's main competitor in target market	Market Share in 2014 (%)	Gaining or losing market shares
A	Germany	Italy	9.9%	Loosing by 1%
		China	8.9%	Gaining by 1%
		Slovakia	8.5%	Gaining by 5%
B	USA	China	59.5%	Loosing by 5%
		Vietnam	15.7%	Gaining by 13%
		Indonesia	7.3%	Gaining by 14%
C	Netherlands	Belgium	19.8%	Gaining by 3%
		China	13.5%	Loosing by 8%
		UK	10.6%	Gaining by 50%

D.1.3 Identify the tariffs and tariff advantages in your potential markets?

Identify the tariffs and trade regimes that Bangladesh faces in the three attractive markets identified in the last section (question B.3.1)

	Target Country	Trade Regimes	Tariffs applied
A	Germany	Preferential tariff for Least Developed Countries	0%
B	USA	MFN duties (Applied)	0%
		MFN duties (Applied)	5%
		MFN duties (Applied)	8.5%
		MFN duties (Applied)	7%

		<i>MFN duties (Applied)</i>	10%
C	Netherlands	<i>Preferential tariff for Least Developed Countries</i>	0%

Do you have tariff advantage advantages/disadvantages vis a vis your main competitors in the three target markets?

	Target Country	Competitors	Tariffs faced by competitors average
A	Germany	<i>Italy</i>	0%
		<i>China</i>	7.7%
		<i>Slovakia</i>	0%
B	USA	<i>China</i>	6.4%
		<i>Vietnam</i>	6.4%
		<i>Indonesia</i>	6.4%
C	Netherlands	<i>Belgium</i>	0%
		<i>China</i>	7.7%
		<i>UK</i>	0%

D.2 Target Market Selection

Taking into consideration the trade patterns that you observed in the last section and the market access considerations that you just reviewed, which of these countries should you select as a target market for this Market Profile and why?

Target market is: **Germany**

Comments:

- Germany is the 2nd largest importing market of footwear commanding 8.3% share of world imports.
- Germany is the 2nd largest importer of this product from Bangladesh (19.3% share in Bangladesh's export) .
- Germany import has grown by 1% over the last 5 years in the world.
- Germany is a growing market for Bangladeshi footwear over the last 5 years (32% growth in value).
- There is a prospect for market diversification of Bangladeshi footwear in the Germany market (bubble graph).
- Tariff applied by Germany to Bangladesh is 0% for this product.

E. PEST Analysis

POLITICAL	ECONOMIC
<ul style="list-style-type: none"> ▪ The government is parliamentary, and a democratic constitution emphasizes the protection of individual liberty and division of powers in a federal structure. ▪ When exporting to Germany, various aspects have to be considered: Customs and taxes, quality and environmental standards, Trademark and competition rules etc. 	<ul style="list-style-type: none"> ▪ The German economy the 5th largest economy in the world and Europe's largest. ▪ GDP of \$3.747 trillion and GDP growth of 1.8%. ▪ The economy follows free market principles with a significant degree of government regulation and generous social welfare programs and protections. ▪ Economic life in Germany is more international in nature than in most other major industrial nations. ▪ The service sector contributes around 70% of the total GDP, industry 29.1%, and agriculture 0.9%. ▪ Leading exporter of machinery, vehicles, chemicals, and household equipment. ▪ Around 2/3rd of the world's leading trade fairs take place in Germany. ▪
SOCIAL	TECHNOLOGICAL
<ul style="list-style-type: none"> ▪ Germany has about 82 million inhabitants. It is by far the largest country in the EU in terms of population. ▪ Passionate about lifestyle and politics. 	<ul style="list-style-type: none"> ▪ There are independent laboratories, comprised of both the national laboratories and private research. ▪ The Ministry for Science and Technology, an organization coordinates and sets priorities for the entire national science and technology program for Germany. ▪ Germany's greatest strength is its automobile industry. 3rd largest automobile producer in the world.

F. People & Product

- German consumption of footwear was € 8.6 billion in 2008.
- German people bought 330 million pairs in 2008, which meant 4.0 pairs per capita, spending € 104 per year, being above the EU average of € 100 per capita (4.2 pairs). German women buy an average of 6 pairs, while German men buy 2 pairs per year. [CBI Market Survey]
- Product Groups:

Footwear	Sales
Casual footwear	52%
Sports	22%
Formal	20%
Evening	6.3%

- According to the IFM (Institute for market research), the most popular shoes for women in 2008 were: In summer: Pumps/ballerinas, laced casual shoes/sneakers, mules, sandals and boots. The main colours were black (40%), brown (13%), blue (9%), grey (9%) and other colours (29%). In winter Boots with warm linings, all other boots, formal shoes/slippers, laced casual shoes/sneakers. The main colours were black (49%), brown (29%), grey (6%) and other colours (16%).
- German Footwear Consumption by user in 2008: [CBI Market Survey]

User	%
Women	61.8
Men	22.3
Children	15.9

- Market Trends:
A reduction in weight, softer leathers (supple lambskin and Napa), velvety nubuck to improve walking comfort and fit. More combinations of different leathers.

G. Permission: Market Access

G.1 Tariffs

Germany

	Market share	Tariff (estimated applied by Germany %)	Tariffs faced	Total ad valorem equivalent Tariff	Trade Regime	
Bangladesh	1.8	0	0	0%	Preferential tariff for Least Developed Countries	
<<Bangladesh's>> main competitors in target market	Market share	Tariff (estimated applied by Germany (%))	Tariffs faced by competitors	Total ad valorem equivalent Tariff	Trade Regime	Tariff advantage for Bangladesh (yes or no)
1. Italy	9.9	0	0	0%	European Union rate	
2. China	8.9	7.7	8	8%	MFN duties (Applied)	
3. Slovakia	8.5	0	0	0%	European Union rate	

G.2 Non-tariff measures

Technical barriers to trade

Important link: <http://exporthelp.europa.eu/thdapp/index.htm>

H. Packaging and Labelling Regulations

Packaging

Care must be given to the packaging of products if one intends to export to Germany. It is obvious that the packaging must be travel-steady. As required, products should also be protected against the elements, changes of temperature, rough handling and theft. Besides these basics of travel- and handle-durability, some importers may have specific demands concerning packaging, like information concerning the order printed on the boxes (order number, box number, name department or contact person etc.).

For environmental reasons packaging made from materials like PVC is less popular with consumers and in some cases is or will be forbidden by government. Exporters in developing countries should be prepared to discuss this issue with potential clients and should anticipate building the cost of special packaging into their price, if required.

The European Directive on Packaging and Packaging Waste (94/62fEC) establishes overall legislation for the treatment of packaging waste, consisting of quantitative objectives to be achieved by Germany and other EU member states. The member states have the responsibility to translate the Directive into national legislation. It is becoming increasingly difficult and expensive to dispose of waste in Europe. In principle, the importer is held responsible for disposal of the packaging waste for all goods from outside the EU. It is therefore crucial, when planning exports to the EU, to take the packaging of your products (both sales packaging and transport packaging) into consideration. To fulfil the requirements of the target market, good communication with the importer about packaging is necessary. Leather shoes are generally packed in individual boxes per pair and 12 to 18 pairs in a carton, but cheaper plastic and textile shoes may also be packed in plastic bags or in bulk. Here too, importers will most likely specify their packaging requirements.

Labeling

The aim of labeling is to foster trade, inform consumers, and highlight the visibility. The obligatory labeling, as described in the EU shoe labeling Directive 94/11/EC, concerns information about parts of footwear, namely the upper, the lining and insole sock, and the outer sole of the footwear article. The information must be conveyed by means of agreed pictograms or textual information, as defined and illustrated in the Directive, and must relate to the material which constitutes at least 80 percent of the surface area of the upper, the lining and insole sock, and at least 80 percent of the volume of the outer sole. However, if no single material accounts for at least 80 percent, information must be given concerning the two principal materials in the composition of the product. The manufacturer or his authorized agent in the EU has to use at least the language or languages of the EU member state of consumption. Exporters should be aware that the labelling should involve affixing the required information to at least one article of footwear in each pair, either by printing, sticking, embossing or, attaching a label. Moreover, the labelling must be sufficiently large, visible and understandable, so as not to mislead the consumer.

At the moment, eco-labels are to a limited degree applied to footwear. The increasing market share of self-service outlets, like grocers' supermarkets and variety stores, has enforced the inclusion of information on packaging or product.

I. Price

Average price of footwear: 36,688 US\$ per ton (Trade Map)

Consumer prices: Average prices of various types of footwear, €

Men's leather shoe	€ 70
Men's leather boot	€ 97
Ladies' heeled fashion shoe	€ 50
Ladies' fashion knee boot	€ 115
Ladies' textile sneaker	€ 47

Source: Retailer websites (2009-10)

J. Placement: Distribution Channels

- The distribution of footwear in Germany is mainly carried out by specialised (retail) traders.
- Using agents, wholesalers and importers to access the German market.
- Agents are important either operating on a regional basis, or on an exclusive basis, but they tend to mainly deal with larger brand names.
- Share of footwear retail distribution in Germany

% value 2008

Outlet type	% share
Footwear specialists	65%
Chain stores	34%
Buying groups	24%
Independent stores	7%
Non-specialists	35%
Department stores	6%
Super/hypermarkets	9%
Clothing stores	9%
Home Shopping (Internet, mail order)	8%
Others (Market stalls, factory outlets)	2%
Total	100%

Note: Sports retailers' share was estimated at 14%

Source: BDSE (2010)

K. Promotion

Trade Fairs

The main trade fair for the footwear industry in Germany are:

- The GDS Fair - <http://www.gds-online.com>- in Dusseldorf which is an International Event for Shoes and Accessories, takes place twice a year in March and September, although more emphasis is on footwear.
- The Munich Fashion Company - <http://www.munichfashioncompany.com>– which organises fashion fairs in Munich.
- Import Shop Berlin – <http://www.messe-berlin.de>- which takes place in November also features footwear.
- Bread & Butter - <http://www.breadandbutter.co>- is a specialist trade fair for street and urban fashion, including accessories and footwear. It usually takes place twice a year in Berlin.

Trade associations

There is information on the footwear industry in Germany at the website of the German Footwear Federation (<http://www.hds-schuh.de>). Some manufacturers featured may be looking to develop relationships with developing country exporters. Other useful contacts are:

- The Association of Footwear Retailers (<http://www.bdse.org>) and the Institute of Textile Traders (<http://www.bte.de>).
- The shoe portal for the footwear trade <http://www.schuhe.de>, which also includes information on footwear trends.
- Another shoe portal with useful links is <http://www.schuhmarkt.de>.
- Market information and trends can also be found at the German Footwear Institute (<http://www.schuhinstitut.de>).

L. Potential Prospects

SI	Organization	Country	Contact no.	Website
1	Deichmann SE Marketingabteilung	Germany, Essen	Phone: 49 201 867600 FAX: 49 201 8676733 Executives: Heinz-Horst Deichmann (Owner)	http://www.deichmann.com
2	ORION ITALIANA GmbH & Co. KG	Germany, Detmold	Phone: 49 5231 60500 FAX: 49 5231 605236 Executives: Horst Wortmann (General Manager)	http://www.wortmann.com