

WORLD FOOTWEAR

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6

THE MAGAZINE FOR THE GLOBAL SHOE INDUSTRY

Global sports shoe review
Brazil's currency quandary
Foot health for children
The appeal of retro



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Adidas Originals, a range benefiting from the widespread popularity of 'retro' styles in today's footwear market.

Image: adidas

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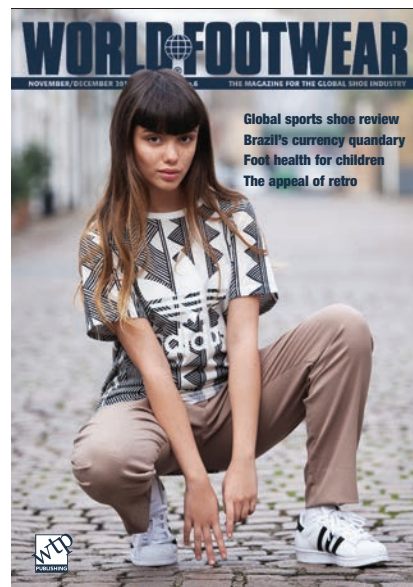
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IBC Essential reading



News

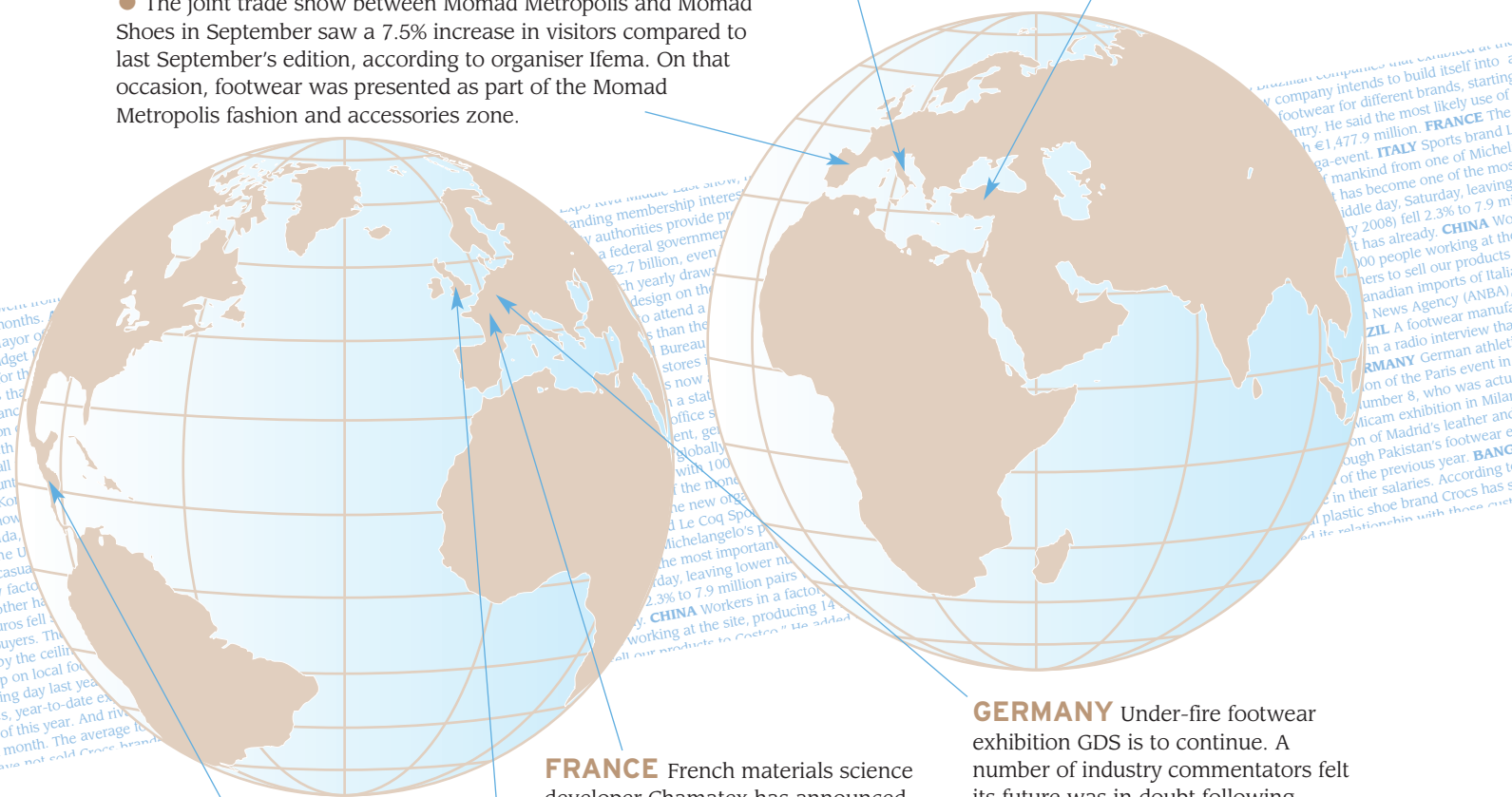
ITALY The president of Italian footwear association Assocalzaturifici, Annarita Pilotti, says orders at the Moscow-based Obuv. Mir Kozhi show saw a "significant drop" this year and called for the event to be rescheduled in the future. Ms Pilotti said there had been a drop of between 30% and 50% in orders, with high-end Italian products hit especially hard.

- Sixteen high-end Italian footwear brands attended an inaugural event in Singapore in late October, presenting their latest collections to local buyers, and also to potential new customers from Malaysia, Indonesia, the Philippines, Thailand, Taiwan and Australia.
- Luxury group Tod's has announced it will provide funding to build a manufacturing centre in Arquata del Tronto, the Italian district hit by a 6.2 magnitude earthquake in August.

SPAIN More than 200 footwear industry executives attended Spain's first national footwear congress in Elda, in the province of Alicante. The organisation's president, Antonio Porta, used the congress as a platform to say that the footwear industry in Spain is actively trying to recruit young people.

- The joint trade show between Momad Metropolis and Momad Shoes in September saw a 7.5% increase in visitors compared to last September's edition, according to organiser Ifema. On that occasion, footwear was presented as part of the Momad Metropolis fashion and accessories zone.

TURKEY The 40th Izmir International ShoExpo Fair was held in the third week of October in Izmir. More than 150 domestic and overseas footwear and accessory brands attended.



NICARAGUA Reports from Nicaragua suggest that, once again, the country's education ministry will provide shoes and other products to school-age children throughout the country to encourage young people to remain in education and to give a boost to local manufacturers.

UK Footwear brand Vans has partnered with Undercover London, a company specialising in contemporary umbrella designs, to release a waterproof collection. It includes a selection of shoes and umbrellas featuring water-resistant technology.

FRANCE French materials science developer Chamatex has announced "a major innovation" that it says will benefit footwear designers, especially those focused on sports and leisure brands. The development is a high-performance material it has called Matryx, which will offer high levels of resistance, breathability and support, as well as being lightweight, according to Chamatex.

GERMANY Under-fire footwear exhibition GDS is to continue. A number of industry commentators felt its future was in doubt following disappointing visitor numbers this year. Nevertheless, after a meeting with the event's advisory board, organiser Messe Düsseldorf has said GDS will run in 2017, the first edition taking place in Düsseldorf from February 7-9, when 700 footwear brands are expected to take part.

- Adidas is to release one million pairs of its running shoe made from recycled ocean waste by the end of 2017. The shoes are made entirely from recycled plastic, with each upper containing 16.5 old plastic bottles as well as nylon from discarded fishing nets.

PAKISTAN In the first two months of its current financial year, July and August 2016, the country exported 1.9 million pairs of shoes with a value of \$19.7 million. This represents a 10.9% increase in volume but a 3.2% decrease in value.

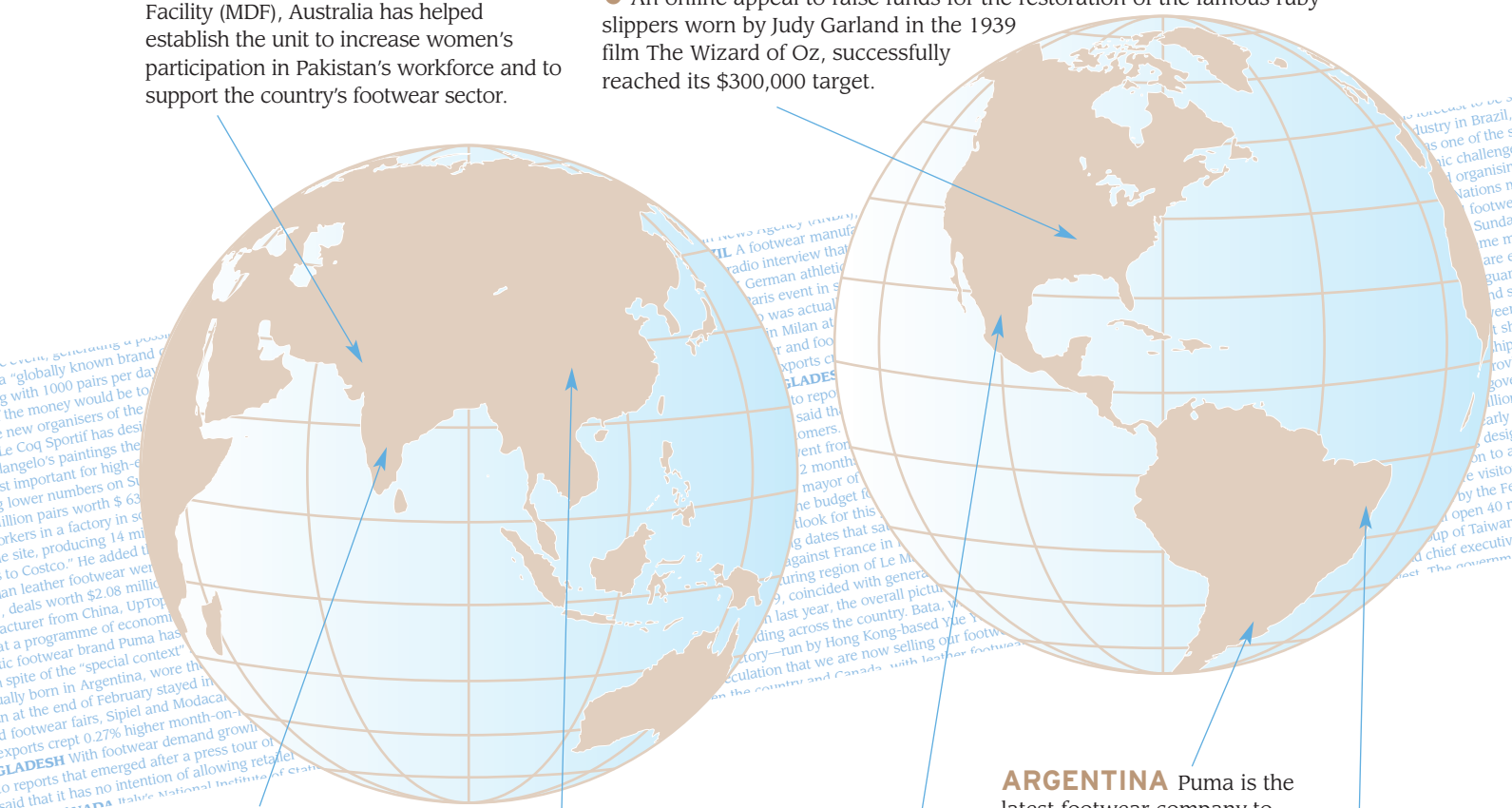
- The Australian government has funded a footwear production facility in Lahore that will have a workforce made up entirely of women. Through its Market Development Facility (MDF), Australia has helped establish the unit to increase women's participation in Pakistan's workforce and to support the country's footwear sector.

US US footwear sales fell 5% year-on-year in September, according to a report from market research organisation The NPD Group. Total revenue generated by footwear for the month was \$2.4 billion.

- The president of the Footwear Distributors and Retailers of America (FDRA), Matt Priest, says the implementation of the Trans-Pacific Partnership (TPP) free-trade agreement would save US families billions of dollars.

- Sportswear brand New Balance has teamed up with the Penske Footwear Design Academy to offer aspiring designers a three-week intensive course in footwear design.

- An online appeal to raise funds for the restoration of the famous ruby slippers worn by Judy Garland in the 1939 film *The Wizard of Oz*, successfully reached its \$300,000 target.



INDIA Portuguese footwear brands are aiming to boost their market-share in Australia, part of a wider initiative to grow the industry's extra-EU exports. Portuguese industry sources put the Australian market at around 150 million pairs per year, while Australia's own shoe industry produces only 10 million pairs a year, making it an attractive market for exporters.

CHINA China produced just under 60% of global shoe output last year, according to figures released by footwear automation and machinery provider Desma at its 2016 supplier exhibition in mid-September.

- Exports of leather shoes from China fell in volume by 20% in the first seven months of 2016 compared to the same period last year. In terms of value, the year-on-year decline was almost 22%.

- Manufacturer of antimicrobial and anti-odour technologies for performance fabrics Noble Biomaterials has established a strategic alliance with Chinese sportswear brand Anta Sports. The partnership will bring together Noble's XT2 odour-management technology with the performance apparel and footwear that Anta produces.

MEXICO The CICEG footwear industry association in Guanajuato has warned that the country's shoe exports to the US are likely to suffer because of the Trans-Pacific Partnership (TPP) trade agreement, which would give preferential market access to countries like Vietnam.

ARGENTINA Puma is the latest footwear company to experience difficult times in Argentina following the new government's policy of making it easier for retailers to import product. Workers at the three factories that Puma Argentina runs in the province of La Rioja have been told to take their summer holidays early owing to a slow-down in sales; 900 workers are affected.

BRAZIL Brazilian footwear companies exported 10.4 million pairs of shoes in September, according to the figures from Brazilian footwear association Abicalçados. The total value of the exports was \$84.7 million.

- Footwear Components by Brazil, a programme run by industry body Assintecal and export promotions agency Apex-Brasil to boost overseas sales of Brazilian-made shoe materials, has reported a 34% increase in export revenues in the first nine months of 2016 compared to the same period last year.



Footprints

COACH STEPS BACK INTO SHOES

Leathergoods brand Coach is making another attempt to conquer the women's shoe business and has turned to the outgoing CEO of sister company Stuart Weitzman for help.

Wayne Kulkin, who spent almost five years as Stuart Weitzman CEO, will act as a consultant to Coach on the project. Coach CEO, **Victor Luis**, said the company would not renew its women's footwear license with long-time partner Jilar Corporation.

Mr Luis described footwear as the "life-blood" of Mr Kulkin's 25-year association with Stuart Weitzman, founder of the eponymous brand. He paid tribute to his knowledge of the footwear market and specifically of the women's segment.

Coach is also hoping to take advantage of Mr Kulkin's experience in marketing, supply chain and customer understanding. It will retain full control over sourcing, design and marketing for the range, which will launch in 2017.

TEVA RECRUITS FORMER NIKE EMPLOYEE

Footwear group Deckers Brands has appointed **Maggie Winkel** as general manager of its Teva brand, which specialises in sports sandals.

Ms Winkel assumed the role on October 24 and will manage global product and brand marketing for Teva, as well as overseeing the brand's wholesale business in the US.

Ms Winkel was most recently the integrated marketplace director for the Nike-owned Jordan brand in the US. She was in charge of merchandising strategies, expanding the brand's apparel market in the US and improving the retail experience. She has also spent time at the head of the women's denim business at Levi Strauss & Co.

Deckers also named a new product director for its Sanuk lifestyle footwear brand. **Frederic De Beule** took over from **Trisha Hegg** on October 17.

Mr De Beule will be responsible for the brand's creative vision, design direction and future lines for all Sanuk



REEBOK NAMES NEW CREATIVE DIRECTOR

Sports brand Reebok has appointed **Thomas Steinbrück** as its creative director. This is the first time in several years that this position has been filled, the company says.

Mr Steinbrück will be in charge of the creative direction of Reebok's footwear and apparel collections. The brand says he will be responsible for "setting trends, creating themes and providing inspiration and guidance to the design teams". This will allow them to "deliver innovative, style-led fitness products".

"Thomas is not only an excellent creative, he is the perfect fit for the Reebok brand as he shares our passion for creating products for our consumer that perform at the highest level for their fitness activities, while ensuring that they look and feel great and stylish in their daily lifestyles," said Reebok president, **Matt O'Toole**.

products. He joins from adidas, where he was a senior product manager for the Originals range of products. He has also managed product lines in Europe and the US for Nike.

CASEY SHEAHAN TO BE KEEN'S NEW PRESIDENT

Outdoor footwear brand Keen has named former Patagonia chief executive **Casey Sheahan** as its new president. He will succeed **Steve Meineke**, who retires in mid-November.

Since retiring from Patagonia in 2014, Casey Sheahan has served on several advisory boards across the outdoor

industry, including Keen's. According to the footwear brand, this afforded the new company president "a real-time perspective into the company, strategic initiatives, organisation, and opportunities ahead".

For his part, he said Keen is the only brand for which he would have considered abandoning his "post-Patagonia fly-fishing sabbatical". He described the brand as a company that is "authentically disrupting the status quo".

MIZUNO USA PRESIDENT TO STEP DOWN

Bob Puccini, president of sports footwear brand Mizuno USA, will retire from his role as company president at the end of the year.

He will move to the position of non-executive chairman, where he will act as an independent consultant and advisor to the company's senior management team. He also retains his place on Mizuno USA's board of directors.

Mr Puccini joined Mizuno USA in 1995 and became president a year later. He had previously occupied leadership roles at companies that included adidas and Head Sports.

Current Chief Operating Officer, **Mark O'Brien**, will take over as president on at the start of 2017. He will also serve as chairman of Mizuno Canada. In his current role, he is responsible for overseeing brand, product and sales management.

BIG NAMES ON JUDGING PANEL FOR PETRER AWARD

Two major names from the world of footwear design led the judging panel for the 2016 Premios Model design competition in Petrer, one of Spain's most important shoe-making towns.

Designers **Sara Navarro** and **Stuart Weitzmann** were both on the panel for the competition, which celebrated its twentieth anniversary this year with a gala awards ceremony in October.

There were 39 entries for the competition this year, showcasing new designs for footwear and accessories. The winners were Elche-based designer **Jorge Murillo** in the footwear

category for a design called 'Farfalla', and Petrer-based **Freddy Corredor** in the bag category for his fish-inspired 'Acuario' bag.

FERRAGAMO APPOINTS FIRST WOMEN'S FOOTWEAR DESIGN DIRECTOR

Luxury brand Salvatore Ferragamo has appointed **Paul Andrew** as its first women's footwear design director. His first collection for the Italian company will be available in 2017.

Ferruccio Ferragamo, president of Salvatore Ferragamo, said he was excited to welcome Mr Andrew, who he described as "dynamic" and an "established talent".

"We have a proud history of nurturing design talent and we believe that Paul's credo very much matches the spirit at the heart of our house," he added.

Paul Andrew founded an eponymous line of women's shoes in 2013, having gained experience at Calvin Klein and Alexander McQueen. In 2014, he became the first footwear designer to win the CFDA/Vogue Fashion Fund, which rewards the most promising young fashion designers.

NEW BRAND PRESIDENT FOR VANS

Footwear brand Vans, part of the VF Corporation, has named **Doug Palladini** as its president. The brand says he will be in charge of Vans' global strategy and will lead its regional sales teams. He will also oversee global marketing and continue to oversee sales in the Americas region.

He has been at Vans since 2004 in various capacities. He spent nine years at the head of the global marketing team and had been vice president and general manager for the North America region since 2013.

His predecessor, **Kevin Bailey**, paid tribute to Mr Palladini's "remarkable leadership and deep connection to Vans' heritage" and said that his experience would serve him well in his future role. Mr Bailey will remain as president of VF's Action Sports division.

FORMER VF MAN IS NEW BEARPAW CFO

US shoe brand Bearpaw Footwear has named **Jason Martini** as its new chief financial officer. He will oversee the

company's manufacturing planning and financial development, both domestically and overseas.

Mr Martini recently ended his 10-year stay at VF Corporation, where he served in various capacities within the group's Jansport brand, the last of which was as chief financial officer.

"With Jason Martini's impressive background, we are very fortunate to have him join Bearpaw, bringing with him a deep knowledge of what is needed to transform the explosive demand for Bearpaw's platform into a financially strong business," said John Pierce, president of Bearpaw.

Bearpaw also announced the appointment of **Edna De Pamphilis** as its marketing director. She will lead the brand's marketing and communication efforts, developing new marketing strategies to continue growing Bearpaw's identity.

FORMER UGG PRESIDENT JOINS VIONIC

Comfort footwear specialists Vionic has named **Connie Rishwain** as president of its global business. She spent over twenty years as president of Ugg, which is owned by Deckers Brands.

In her new role, Ms Rishwain will oversee product, marketing and sales, as well as joining Vionic's board of directors. She will report to company CEO **Chris Gallagher**.

"Throughout her career Connie has delivered tremendous style to consumers and value to shareholders, and we look forward to the leadership she'll now bring to fuel our next phase of growth," Mr Gallagher said.

"I am excited to join Vionic and help build on the success they have achieved," said Ms Rishwain, who has also held senior roles at Teva and Simple, both owned by Deckers.

UITIC CONGRATULATES COMMITTEE MEMBERS

The International Union of Shoe Industry Technicians (UITIC) has congratulated two members of its executive committee on important new appointments in their home countries.

Li Yu Zhong, a member of the UITIC's executive committee since 2011, has been named as the new chairman of the China Leather Industry Association, taking over from **Su Chaoying**.

And as reported on *footwearbiz.com* earlier this year, UITIC's treasurer and executive committee member, **Miguel Angel Martínez**, has taken over as director of Spanish footwear research and technology institute Inescop.

LACOSTE CHAUSSURES PRESIDENT TO TAKE WIDER GROUP ROLE

Pentland Brands has made a number of changes to its executive team, creating several new roles.

Among these, **Richard Newcombe**, currently brand president for Lacoste Chaussures, will lead footwear across the group from the start of January 2017.

In October, **Chirag Patel**, currently global vice-president for product and marketing at Lacoste Chaussures, became the group's director of global strategy. He and his team is responsible for "the strategic shape and growth of the Pentland brand portfolio", the group said.

KATY PERRY LAUNCHES FOOTWEAR COLLECTION

US singer **Katy Perry** is to release her own shoe line in partnership with apparel, footwear and accessory company Global Brands Group.

"It's been a creative goal of mine to be a real contributor in the affordable fashion space," said Perry. "Launching a footwear collection felt like a natural first step for me."

The Katy Perry Footwear collection for women will include heels, sandals and sneakers. Global Brands says the designs will use materials such as lucite and vinyl and will feature metallics and floral prints.

"The collection highlights Katy's signature style, with unique, standout details within several distinct themes that we believe will resonate with consumers on a global level," said **Jimmy Gabriel**, president of footwear at Global Brands Group.

REEF APPOINTS SALES DIRECTOR FOR EUROPE

Surf-inspired footwear brand Reef has appointed **Fabio Marangoni** as its new sales director for Europe. Starting in December, he views Reef as "a great brand with huge potential".

Most recently, Fabio Marangoni has worked as emerging markets area manager for Vans. Previous employers include The North Face, Intersport, Nordica, Alpinestars and Diesel. 

Products & Services

NEW TPU CAN GIVE RUNNERS AN ENERGY BOOST, HUNTSMAN CLAIMS

Chemical company Huntsman has announced the launch of smartLite PF 1560 TPU, which it describes as a “super-lightweight, high energy-return, thermoplastic polyurethane (TPU) that can transform the comfort and performance of sports footwear, particularly running shoes”.

The company states that smartLite PF 1560 TPU is a low-density, elastic material that is 100% recyclable. It is a specifically formulated grade of TPU that is durable, resilient, and has the potential to deliver an energy return of up to 50%, Huntsman claimed, with the ability to spring back to its original shape after being stretched or compressed. “It is perfect for producing soft, bouncy midsoles for a wide range of athletic footwear,” the company stated.

A special manufacturing process makes the product “fully tunable”, according to the manufacturer, meaning that the cushioning effect offered by smartLite PF 1560 TPU can be customised for different applications, giving footwear manufacturers and brands a high level of flexibility in the design and performance of shoes.

Sports shoes featuring the new TPU will be comfortable and have the potential to help wearers run faster and for longer, while expending less energy. In midsole applications, it works by stretching to accommodate the impact caused by running, jumping or walking. As the flow of movement changes, and feet lift off the ground, the material responds, returning to its original shape and transferring any power amassed to wearers, giving them an extra spring in their step. This energy cycle can happen multiple times without diminishing the physical or mechanical performance properties, according to the company.

It has high levels of UV protection, meaning it is less prone to yellowing over time, is stable at a wide range of temperatures, from -20 - +40°C, and complies with all major health and safety regulations.



REEBOK TO USE BASF LIQUID FOR FOOTWEAR INNOVATION

Sports brand Reebok has unveiled plans for a new facility, the Liquid Factory, which would use 3D drawings and a proprietary liquid material to speed up the development of new footwear products.

The Liquid Factory has been devised by Reebok’s new innovation department, using software and robotics to draw shoes in three dimensions. It then uses a liquid material, created for Reebok by chemicals manufacturer BASF, to draw the product precisely in 3D layers. The company says this technique creates “totally unique footwear, without the use of traditional moulds”.

Bill McInnis, current head of future Reebok and a former NASA engineer, led the project. “We wanted to fundamentally change the way that shoes are made,” he said. “With this new process, we were able to programme robots to create the entire shoe outsole, without moulds, by drawing in layers with a high-energy liquid material to create the first ever energy-return outsole, which performs dramatically better than a typical rubber outsole.”

The Liquid Speed (pictured), the first concept shoe produced using this method, has already been unveiled by Reebok. It says the running shoe has a focus on energy return and brings the outsole and lacing together in one piece. It will release 300 limited edition pairs of the shoe.

Reebok plans to open the first Liquid Factory manufacturing laboratory in Rhode Island, USA in the coming year.

DOW ELASTOMERS WANTS TO HELP “DRIVE ADVANCES” IN FOOTWEAR

Material science company Dow Elastomers has said its work with Under Armour as part of the Lighthouse centre for manufacturing and design innovation will help it to “drive advances in footwear performance”.

Dow said its work as a Lighthouse partner will help it “accelerate innovation in product and process technology to regionalise and automate athletic footwear manufacturing”. It sees its role in this as providing scientific expertise, research and development capabilities and “premium solutions”.

An example of the solutions Dow wants to offer is its Infuse olefin block copolymer foam technology for use in the midsole of athletic shoes to improve rebound, compression set, comfort and dimensional stability.

“By working closely with Under Armour, this partnership will allow the production of high-performance footwear in a way that is more effective and efficient,” said Greg Jozwiak, business president of Dow Elastomers. “We’re committed to cutting-edge materials science solutions that will help Under Armour and their athletes push the limits.”

The Under Armour Lighthouse centre opened in Baltimore in June.

DSW OFFERS 3D-PRINTED SHOES IN SOME STORES

US footwear retailer DSW has installed pop-up shops in two of its flagship stores offering customised 3D-printed shoes.

The pop-up shops are a collaboration with 3D printing technology startup Feetz, in which DSW invested in June and are in DSW's stores on 34th Street in New York and in Union Square, San Francisco. Customers will be able to customise a unique pair of shoes and then watch as the 3D printers start the process of creating their product.

"DSW is excited to be the first to bring Feetz's innovative technology to our customers through this pop-up experience," said Simon Nankervis, DSW's chief commercial officer. "We believe [this] has the potential to disrupt the footwear industry as we know it today."

Feetz uses a mobile foot scanner to capture 5,000 data points and 22 dimensions of the foot. This allows it to produce a customised, 3D-printed shoe in less than two weeks.

VIBRAM'S ARCTIC GRIP SOLES ON SALE THROUGH WOLVERINE BRANDS

Soling technology provider Vibram has announced that its Arctic Grip designs are now available at retail on the shoes of footwear brand partners, all from the Wolverine World Wide group.

Six Wolverine brands, Merrell, Sperry, Hush Puppies, Wolverine, Saucony and Cat Footwear, will serve as exclusive Arctic Grip launch partners, with products now available in retail stores.

Vibram has described Arctic Grip as its most advanced, cold weather gripping system ever.

ADIDAS UNVEILS FIRST SPEEDFACTORY SHOE

Sportswear manufacturer adidas has unveiled its Futurecraft MFG (Made for Germany) sneaker, the first shoe produced at its Speedfactory production facility in Ansbach.

The facility, which is nearly entirely operated by robots, began operations earlier this year. Large-scale production is expected to get underway in 2017. Adidas recently announced plans to open a second Speedfactory in Atlanta, US.

The Futurecraft MFG uses adidas's Boost technology, which offers increased energy return when running. It also features a Primeknit upper, designed

to improve comfort. A new torsion bar in the outsole offers greater flexibility.

The design process was helped by adidas' Aramis motion capture technology, which allowed it to examine how the foot moves when running.

The sneaker will be added to the adidas Running line and is to be sold exclusively in Germany. Adidas plans to launch shoes made in its Speedfactory in other categories and in more markets.

SYMPATEX LAUNCHES 100% RECYCLED MEMBRANE MATERIAL

High-tech functional materials developer Sympatex Technologies has introduced a 100% recycled Sympatex membrane for the first time, with footwear one of the target application areas. It presented the next stage of development at September's Lineapelle exhibition in Milan. It also showed new laminate developments in the footwear business division.

The Sympatex membrane is PTFE-free and PFC-free. It is made of polyether-ester that represents no health hazard and can be recycled in a similar way to PET bottles. The company introduced a pre-consumer recycling procedure as a standard part of its manufacturing of the membrane in 2011, helping to reduce the amount of virgin material it uses by up to 15%.

It says a 100% recycled membrane is the next step in this process; this will involve making membrane material that consists exclusively of unused waste. "If you then laminate the 100% recycled Sympatex membrane with a 100% recycled polyester lining or outer fabric, you can create a completely recycled mono-material laminate," according to the company.

KEEN SHOWS OFF ROBOT

Outdoor footwear brand Keen had a new robot on display at the August Outdoor Retailer Summer Market in Salt Lake City.

In 2014, the company launched a new footwear platform called Uneek. The principle behind Uneek is to use two interlocking cords to make a shoe's upper instead of building footwear out of flat materials that Keen says "don't naturally conform to the shape of the foot". As well as the original Uneek shoe, it brought out a sneaker called Uneek02.

Keen says it will continue to expand

the Uneek line and will automate the platform using robotics; the robot it took to Salt Lake City, developed with technology provider ABB, is called the Uneek robot.

The technology is capable of producing a shoe in half the time of the current production process.

NORTHWAVE UNVEILS NEW MODELS AT EUROBIKE

Italian cycling footwear and apparel brand Northwave presented its latest products for road cyclists and mountain bikers at the 2016 edition of Eurobike in Friedrichshafen, Germany.

The Extreme RR model features Northwave's XFrame technology, which the company says eliminates all pressure points on the shoe's upper. It has a new upper construction, an inner mesh for increased comfort and a stiffened mid-layer for even support throughout the shoe. It also has a wear-resistant outer film for extra protection.

Northwave also introduced the latest editions to its Outcross line, which features the Explorer outsole developed alongside Michelin Technical Soles. It says this range is ideal for the modern mountain bike rider as it performs well on challenging terrain.

The Michelin sole features a calibrated stiffness midsole for effective power transmission when riding and has good flexibility to guarantee good performance and comfort. The OC Compound rubber tread used by Michelin provides good grip on a variety of surfaces.

The new offerings include the Outcross Knit, the first knitted cycling shoe. Northwave says the knitted upper offers excellent comfort and breathability and is reinforced with impact-resistant thermowelded features to offer complete protection. 🌀

CLARIFICATION

The May-June 2016 issue of *World Footwear* carried a feature on work Portuguese leather producer Carvalhos Group has done on biodegradable material for shoes. On page 20, we incorrectly listed CTC, France, as one of the tanning group's partners in this work. It was the CTCP footwear technology centre in Portugal that Carvalhos Group partnered with for this project.



Backtrack

World Footwear's publishing cycle and limitations on space make it impossible for us to run more than a carefully selected sample of news from across the industry.

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We list below just a few of the headlines that have appeared on the site in recent weeks –

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28/10/16

Tod's puts emphasis on digital after sales dip

26/10/16

Footwear project from Design na Pele
Vans growth in Asia not enough to satisfy VF

20/10/16

Covestro aims to "make the world a brighter place"

19/10/16

Stella International to tap into 'athleisure' trend

18/10/16

Peter Mangione addresses Mexican shoe industry
Kenyan athletic footwear brand attracts venture capitalist offer

17/10/16

September dip, but growth goes on for Pou Chen
Louboutin drops into Nordstrom store

14/10/16

Wolverine starts expansion project at Michigan factory

12/10/16

Brazil launches new programme to help increase productivity
AAFA criticises Alibaba over counterfeits

10/10/16

Ferragamo offers bespoke option for Giglio range

07/10/16

Ecco opens Vancouver 'shop-in-shop' for leathergoods

06/10/16

Bearpaw launches apparel collection
Footwear workers in Argentina ask neighbours to join protest

05/10/16

Brazilian brands head to China for trade mission
Moreschi helps Confindustria deliver positive Pavia news
Baldinini breaks into US market

04/10/16

New chief executive for Clarks

03/10/16

Deichmann acquires "cult brand"
Italian brands to have presence at India Fashion Week

29/09/16

Sapica visitors place orders for more than 20 million pairs of shoes

28/09/16

Yue Yuen production volumes increase but sales figures stay flat
Hoka One One earns official footwear status for Dallas Marathon
FDRA travels to Africa for joint summit with Made By Ethiopia

26/09/16

Vibram brings Arctic Grip technology to Lineapelle

23/09/16

Salewa to have 100 sales points in China before year-end
Leather shoe downturn also affects China's ports

22/09/16

Nike partner announces new factory in Jalisco

21/09/16

US still well ahead in shoe consumption table
Women's athletic footwear market on the rise in Canada

20/09/16

New collection from Freya Rose
Shoes contribute to first-half growth for French leather sector

19/09/16

Growth goes on for Bata in Pakistan

16/09/16

Tod's to shift strategy after disappointing results

15/09/16

Donated Bogs boots to help volunteers in Africa
Vibram committed to manufacturing in US

14/09/16

Footwear off to a flying start for new fiscal year in Bangladesh
'Eco' schools to recycle footwear for Shoe Aid
Footwear and apparel companies call for TPP vote

13/09/16

Asics offers ostrich leather option for Gel Lyte update
FICE president optimistic after latest Momad Shoes

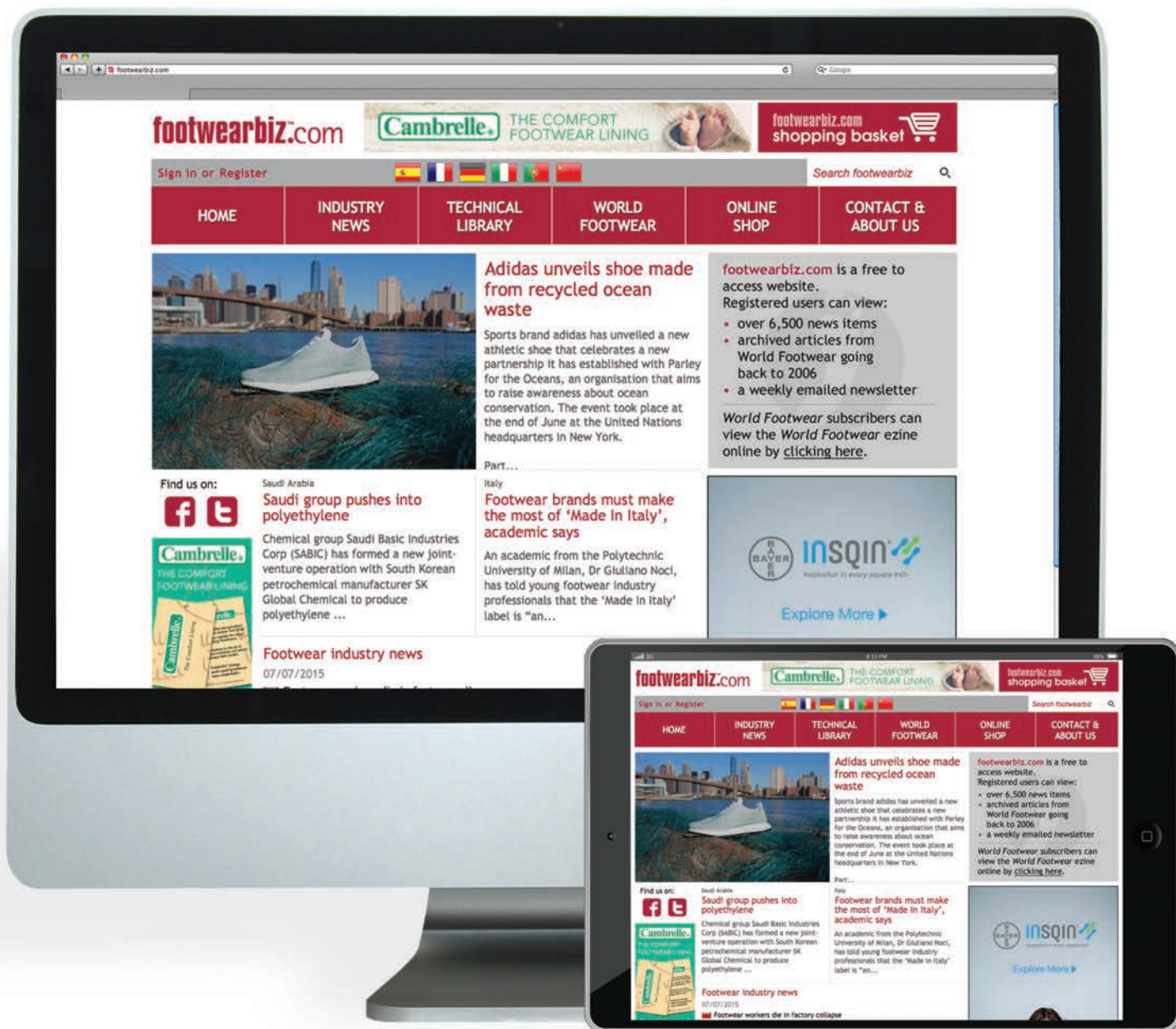
12/09/16

Micam generates \$43 million for Brazilian companies

09/09/16

Sixteen groups will share 2016 Keen Effect grants

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There has been a great deal of talk about labour costs in China becoming so high that companies are sourcing elsewhere. Nike, for example, is said to have moved production of shoes from China to Vietnam. *World Footwear* talked to several manufacturers, brands, and suppliers at the most recent Expo RivaSchuh and found that the responses were far more nuanced than expected.



Rohde - made in Europe from Italian leather.

CREDIT: WTP

More to China than money

There were more Chinese companies showing at the most recent exhibition in Riva del Garda than in previous seasons. With regard to how Chinese suppliers are handling increasing labour prices, Sky Studio said that what is important is to service the customer and to make good products, and deliver on time. A representative of the company said that if the factory and the retailer or wholesaler can make money, everyone is happy.

Jacinthe Wong, who has a factory in Xiamen, but also several years of sourcing behind her in both China and Vietnam, said labour costs are not the only factor that matters. "You also need to look at the volumes and the raw material and component sourcing," she said. "In Vietnam you need to ship everything, such as buckles, shiny PU and decorations, unless you are making simple vulcanised shoes in canvas."

Large streamlined organisations such as Dutch group Eegim still tend to source mostly from China, but it is "always looking" for new possibilities, a spokesperson at the fair said.

Design is becoming a more important factor; factories can no longer compete on price alone just by showing cheaper versions of Western fashion. Some would say men's shoes designed by Xiao Lei from Guangzhou can compete with the best Italian shoes when it comes to design. When asked about prices he said that this wasn't important, since his shoes were selling because of their innovative designs. Most of his leather

comes from Italy and he only uses leather linings and soft insoles. "Just because my shoes come from China it doesn't mean that they have to be cheap," he says. "My shoes are just as good as the Italian shoes. I often use Italian leather. My prices match Italian prices and they sell on the design."

Politics can also be involved in sourcing decisions. Factories in Vietnam, Cambodia and Myanmar are often run by firms from Taiwan, South Korea or China. Relations between the Vietnamese workers and the Chinese factory-owners can be tense. There have been several stories of Chinese factory-owners being attacked. Strikes are also more common in countries such as Vietnam and Cambodia, causing disruption to production. There is also a perception among some manufacturers in China that when giant western companies start moving production from China to countries including Vietnam, Bangladesh or India, it is not just an economic, but also a political decision: they want to invest less in China so as not to become too dependent on its partners there.

Asian alternatives

India and Pakistan are alternative sourcing countries that are doing better; especially in men's shoes where leather uppers and linings are important. But moving business there does not always go smoothly. Portuguese company Norberto Costa has looked at both Brazil and India in the past, but has now come back home



Opera women's shoe in leather and brocade

CREDIT: WTP

to Portugal for greater quality control and better raw materials.

Indian companies such as Liberty Shoes, from near New Delhi, are optimistic after the Russian crisis. Sunil Bansai, its executive director, points out that, since the crisis, Russians are looking outside the EU to buy shoes and that his company has high hopes for its fusion sneaker range in all-leather uppers and linings. He claims these can compete well on price and quality with Italy, especially now that there is a wide range of lightweight PU outsoles made in India.

Krishna Beads from Mumbai has been making bags, scarves, and other accessories for almost 40 years in both India and China. The company uses Spanish bag designers, and has had offices in China for 13 years. At the Garde fair the company launched its shoe collection as an additional accessory, featuring beading and pom-poms. Pratul Maheshwari explained that, although his company is able to source the same shoes more cheaply in China, most customers want "a better-quality product" from India. "Indian quality has improved very much recently," he explained. "We sell a full leather fashion shoe or sandal with leather lining and sole, for a little bit more than it would cost to make in China, but the shoes are not synthetic at all."

European options

What about European production? This used to mean shoes made in Italy or Spain, for example. Today, for most people, it means made anywhere in Europe. Many Italian factories in the north use Albania or Romania. But in these cases all design, quality control, components and inspection are Italian-run. Italian technicians make the patterns and check the quality. Opera from Brescia makes high-fashion women's shoes in beautiful Italian leathers and brocades in Albania. All components are sent to the factory from Italy. Every shoe is not only inspected during production but the shoes are sent back to Italy to be checked again before shipping.

Mis G from Bulgaria makes fashion shoes with full-grain leather uppers and full leather lining. And labour costs in the previous Eastern Bloc are much cheaper than in countries such as Italy and Spain. They are taking much of the business today. These countries are no longer just cheaper manufacturing countries, they can produce own brands rather than private label. Italian children's shoe brand Melania is celebrating 50

years this year, and has always manufactured in Europe. Its shoes are made 100% in Italy and Romania using materials and components sourced in Italy. Italian technicians make sure the shoes made in Romania meet specification. The company has no intention of moving away from Europe and business is good.

Rohde is another company that still makes almost all of its shoes in Europe, in countries such as Portugal and Slovenia. Since it is a brand focused on comfort, it needs to control quality and deliver fast to market. However, since it is strong in home slippers, it has added hand-felted wool slippers on suede soles from Nepal, and will be giving €5 per pair sold to earthquake victims or to women's projects there. This project is starting began in autumn this year.

Giant US companies cannot just move production of maybe 100,000 pairs to Europe as the factories there are no longer geared up for huge volumes.

Naot still produces shoes 100% in Israel, but the Dafnia collection is direct-injected, which can keep the staff costs down. The company is keeping production in Israel and has no intention of moving abroad. Naot feels it is competitive because its is closer to Europe, and generally has a lower MOQ (minimum order quantity) than rivals in China.

For footwear technology developer Manfred Everz, being close to the target market is the attraction of working with the footwear factories in different parts of the world. He has designed and patented a system that allows shoes to offer a kind of foot massage to help prevent the onset of diabetes. His system is licensed for production worldwide with several different factories, from high-heeled shoes made in Dongguan to footbed sandals made in the Middle East as well as European-made leather comfort sandals. He envisages a move towards more European production. When a worker in China can get €700 a month, one in Serbia €300, and Romania €300-400 (very approximately) the facts are clear. European production means that shoes can reach customers in Germany in two or three days, whereas shoes from China can take at least four weeks to get to Europe. It is not just a matter of keeping customers happy, it is also that orders placed in China mean that the buyer's money is tied up for longer.

The sourcing roundabout shows no hint of stopping, and the next country on the list is Ethiopia, where even Chinese companies are investing to reduce labour costs, as well as to be closer major markets. 📍



Children's shoe brand Melania remains committed to European production. CREDIT: WTP

Skechers - one of the top ten in 2015 and is on course for another good year. The brand is stepping up its efforts in Europe.

CREDIT: SKECHERS



A recent report ranked the top ten non-athletic footwear groups in the world by their 2015 revenue; *World Footwear* examines how they are faring so far this year.

Footwear's front runners

Earlier this year specialist online media in Spain published a list of the top ten non-athletic footwear groups in the world based on revenues in 2015.

Although not a definitive list, due to changing currency exchange rates and the fact that companies often release overall sales figures that include non-footwear items, the information gives a clear list of the major players in this segment of the global footwear industry. It took into account that in some cases the companies' year-end dates extended to the early months of 2016.

World Footwear has made some attempt to update the list and add extra information where possible. As well as converting all figures into dollars (it is important here to consider the fluctuations that global exchange rates have experienced in recent months), an updated value for the revenue of one of the footwear companies, Clarks, in 2015, which was unavailable when the list first appeared, is included. The figure attributed to Belle International has also been revised as it included sales from its sportswear and apparel business as well as for footwear on the original list. This has moved Belle down one position on the *World Footwear* list. Following these amendments, the ten companies recorded a combined revenue of \$26.9 billion. The list includes one Asian company, six from the US and three from Europe.

German giant on top

German footwear retail group Deichmann topped the list following *World Footwear's* adjustments, with total revenue of \$5.8 billion. It was far ahead of the chasing pack; its revenue was nearly twice that of the company in second place. It only releases full-year financial results and so it is not yet possible to say whether it is building on this dominant position. Deichmann has announced plans to add a considerable number of stores to the 3,000 it already operates in Europe, the US and more than 20 other countries; more than half of the new openings will be in Germany. It also completed the acquisition of boot-focused retail brand Buffalo Boots in October this year as part of a diversification strategy. Heinrich Deichmann the company chairman, said it is targeting "new growth areas" to further boost its sales.

Hong Kong-based Belle International took the top spot in the original list which gave its revenue as \$5.9 billion. However, this included sales of sportswear and apparel as well as footwear business. Only 51.7% of Belle's revenue for the period came from footwear, meaning a value of \$3.1 billion is a more representative figure. What's more, the company's revenue from footwear was in decline during the period in question, dropping 8.5%. This continued during the first half of 2016 as Belle's footwear sales fell by 12.7%.

COMPANY	2015 REVENUE (\$ BILLIONS)
 Deichmann	5.8
 Belle International	3.1
 Skechers	3.1
 Payless Shoesource	3.0
 Wolverine Worldwide	2.7
 Caleres (Brown Shoe)	2.6
 Clarks	2.0
 Deckers	1.9
 Ecco	1.4
 Steve Madden	1.3

Not plain sailing

Belle International is not the only company in the top ten to appear to have had a difficult current year. Wolverine World Wide, fifth on the list with revenue of \$2.7 billion, saw sales in the first half of the year fall 7.9% to \$1.1 billion. Things didn't improve in the third quarter with an 11% drop in sales. Blake Krueger, chief executive of Wolverine, said it continues to "strengthen product innovation". October also saw Wolverine break ground on an extension of its manufacturing facility in Big Rapids, Michigan. This investment will primarily increase production of its Bates brand of military footwear in preparation for further contracts from the US Department of Defence.

Deckers, with revenue of \$1.9 billion in 2015, has also experienced a drop in sales. In the first quarter of the 2016/2017 fiscal year (which ends on June 30), the owner of the Ugg, Teva and Sanuk brands saw an 18.4% decrease in revenue; it attributed this decrease to the timing of shipments and insisted that it was on track to meet its targets. It suffered a further dip of 0.2% in the second quarter, although CEO Dave Powers said the company was "pleased" with the results. Deckers is adjusting to life under new leadership after Mr Powers replaced the retiring Angel Martínez as CEO at the start of June.

Caleres, formerly known as Brown Shoe, achieved revenue of \$2.6 billion in 2015, making it the sixth largest footwear group. CEO and president, Diane Sullivan, said on announcing a 2.3% fall in revenue in the second quarter of 2016 that the company is coping well in a "challenging environment". The group saw a 3% fall in sales in the previous quarter.

Skechers rise continues

Of the companies in the top ten to have released either quarterly or half-year financial results during 2016 only US



Deckers is best known for its Ugg brand of sheepskin boot, but it has made efforts to diversify in recent years.

CREDIT: DECKERS

brand Skechers has seen any significant increase in footwear revenue. Having increased its full-year revenue by 32% in 2015 to \$3.1 billion, it had record net sales of \$1.86 billion in the first half of this year. This came off the back of record second quarter sales and was followed by a further increase of 10.1% in the third quarter.

"International is a key focus for Skechers as we expand our reach and deliver more product into more channels of distribution," its chief executive, Robert Greenberg, said on the release of the brand's half-year results. As well as planning the opening of 42 new stores in China and its first stores in Belgium, Norway and Finland, Skechers is taking advantage of the increase in revenue to develop its European operations. So far this has taken the form of a new UK headquarters in the city of St Albans (about an hour north of London) and the expansion of its European distribution centre in Belgium. The fourth expansion of the site in the south of the country was completed in July, adding an extra 26,5000 m² to its total size. Skechers chief operating officer, David Weinberg, said this was to prepare for "continued growth" in the region, adding that it allowed the company to ship 8.1 million pairs of shoes in the first half of 2016.

Steve Madden, which sneaked into the top ten with revenue of \$1.3 billion, has experienced slight growth so far in 2016; after creeping up 1.7% in the first quarter, sales grew 0.6% in the second.

Best of the rest

Danish footwear group Ecco invested heavily in its store network in 2015, opening a total of 174 new stores; it also closed 79. Its revenue of just under €1.3 billion (\$1.4 billion) was a 7.4% increase year-on-year. The company has not released any financial results so far in 2016. At the summer edition of the GDS exhibition in Düsseldorf, in July, Ecco placed the spotlight on its range of shoes for children. Having established a separate unit, Ecco Kids, in September 2015 to this end, it is now focusing on



UK brand Clarks is going through a transition following a change in leadership; it came in response to a significant drop in profit.

CREDIT: MESSE DÜSSELDORF/CTILLMANN

extending the market for its children's shoes to the German-speaking regions of Europe, according to Kristin Käßlinger, vice-president of Ecco Kids. She says it is hoping the brand can become a "well-established line".

US discount footwear retailer Payless ShoeSource just missed out on a place in the top three of the ranking after achieving revenue of \$3 billion in 2015. No up-to-date information is yet available as to its recent progress. It has launched two superstores, one in Costa Rica and one in the Dominican Republic, with plans to open more. This follows on from the successful opening of its first in November 2012. It also owns stores in the US, Canada and Australia.

UK-based retailer Clarks was included in the original rankings based on its 2014 revenue. Since the publication of the table, the company has released its full-year results for 2015, which showed an increase of 2.6% in sales to \$2 billion. Like Deckers, which it just pipped to seventh spot in the table, Clarks is going through a transition following a change of CEO; Mike Shearwood, former chief executive of fashion brand Karen Millen, was appointed in October to replace Melissa Potter, who left her role in the wake of disappointing financial results after 27 years with the company. 📌

Ecco used the recent GDS show to showcase its range of shoes for children. It is targeting the German-speaking areas of Europe.

CREDIT: MESSE DÜSSELDORF/CTILLMANN





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A comeback by the Brazilian real against the US dollar in the course of 2016 has meant big increases in the South American country's shoe exports have been short-lived.

Dollar helps Brazil shoe exports, but not for long

Brazilian footwear association Abicalçados has said the country's footwear manufacturers are being affected by currency exchange rates. The organisation's executive president, Heitor Klein, has said his member companies agreed orders earlier in the year at prices that reflected a value of 3.50 reals to the US dollar, but that the exchange rates now are around 3.10 reals to the dollar, meaning Brazilian manufacturers are receiving less for their shoes. Attempts now to increase the dollar price to compensate and recover some of the value are making Brazilian shoes less popular among buyers in other countries, he has claimed.

In the first nine months of 2016, Brazilian footwear companies exported 86.9 million pairs, earning revenues from these shipments of \$702.5 million. These figures represent a 0.5% increase in the volume of shoe shipments overseas and a 1.1% increase in value.

Brazil's footwear exports to Chile rose by more than 200% in July. Favourable dollar prices made Brazil an attractive market for retailers and importers, even if only temporarily.

CREDIT: MESSE DÜSSELDORF ICTILLMANN



Dollar prices help exports

Brazil exports more shoes to Paraguay than to any other country: the volume for the first nine months of this year was almost 11.3 million pairs, 13% of the Brazilian total. This trade across the Paraná River attracts scant attention because it mostly comprises cheaper shoes (the average price per pair is just \$3, compared to \$19.43 for shoes shipped to the UK and \$17.84 for those bound for consumers in the US). The US is Brazil's number-one export partner: 8.9 million pairs headed to that market between January and September this year, with \$159.7 million coming the other way. With good dollar prices, Brazil's shoe producers achieved year-on-year growth of 15.9% in export volumes in the first three quarters of this year in the US market and of 16.6% in value.

Argentina takes second spot in terms of value. Shipments of shoes to Argentina had a value of \$83.3 million for the nine-month period and importers there brought in 7.3 million pairs from Brazil. Argentina's president, Mauricio Macri, famously said on taking up office at the end of 2015 that he was committed to liberalising his country's economy with industries that had been relatively protected by his predecessors, including footwear, facing new levels of competition from overseas competitors (including those in Brazil). Exports to this market from Brazil rose by 17.8% in volume from January-September 2016 compared with the same period in 2015 and by 57.1% in value.

Tougher in Europe

European markets are proving tougher. France is still the third largest source of footwear export revenues for Brazil, with a haul of just under \$40 million over the nine months under scrutiny here for just over 6 million pairs. But these figures mean a decline year-on-year both in value (2.8%) and in volume (3.5%). The corresponding figures for Italy are a fall of 12.9% in value and of 11.7% in volume over the same period. The UK is the exception in Europe: there was good growth in value and volume in exports to the UK, 19.4% and 23.3% respectively. No other European market is in the top 20.

As with Argentina and Paraguay, better news has come from closer to home. Other important South American markets registering increases in imports of Brazilian shoes are Colombia (increases of 3.3% in value and of 22.5% in volume), Peru (11.6% in value and 2.4% in volume), Uruguay (13.3% in value and 36.8% in volume) and Chile (4.7% in value and 14.7% in volume).

Red hot Chile

The situation in Chile has been particularly interesting. Figures Abicalçados released earlier showed that Brazil exported 535,000 pairs of shoes to Chile in the month of July alone, more than in the whole of the rest of this year up to that point and 223.7% more than in the same month in 2015.

Chilean industry association Fedeccal says this spike owes much to currency exchange rates. Rates were so favourable in July this year that even importers there who normally source their shoes in China placed orders in Brazil. "It was a temporary situation and big department stores here, such as Falabella, took full advantage," explains Fedeccal managing director, Pedro Beriestáin. "They opted to buy in Brazil, and so did a number of major importers, such as Guante y Gacel, who don't usually import from Brazil." He says all observers expected the import figures to return to normal when the dollar price went back up.

September's numbers show that Chile imported more than 1.9 million pairs from Brazil in the first nine months of this year, compared to just under 1.7 million for the same months in 2015. Mr Beriestáin puts the full-year figure for last year at 1.9 million. Growth is certain, but the pace of growth has already come down sharply from its 223.7% peak. He says the relationship between Fedeccal and Abicalçados is "excellent", and has been for years. "But we don't seem to have translated that into a bigger footwear trade balance between the two countries," he observes. "Across the board in 2015, Chile imported a total of 95 million pairs, with a combined value of \$579 million. Brazil's share of that was 2% of the volume and 3.7% of the value, while China's share of the total was 82% in volume and 68% in value." 🌶️



Brazilian footwear at GDS in July 2016.
CREDIT: MESSE DÜSSELDORF/TILLMANN



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Global sports footwear review

STUART CLEAVER

Sports footwear has been somewhat difficult to define due to the multi-purpose use of such products. The trend towards using sporty footwear without practising specific sports has been in vogue for some time. More recently the advent and growth of Athleisure has been a strong feature of the footwear scene, bringing together the increasing need to at least pay lip service to the concept of 'wellness' and a need to look good at the same time

Even the luxury goods sector has seen the arrival of sneakers able to fit into the luxury footwear category without seeming too out of place. It is therefore necessary when looking at the total

sports footwear market to acknowledge that it does include a significant proportion of footwear which could be used, say, for serious running but may just as likely be used for going to a disco (which may include some sporty action) or for watching events.

The casual footwear phenomenon has spawned some leading players in the industry such as Skechers, Clarks and Ecco, and has also been an innovative sector. Some of these companies may also broaden their scope into specific sports such as Ecco has done with golf. In terms of the overall global industry, total production of all types of footwear has now exceeded 20 billion pairs per annum.

Sports footwear forms an important sector in the industry not only in terms of the quantities involved but also in terms of the technological and marketing developments which give footwear as a whole, a higher profile.

PRECISE NUMBERS ARE DIFFICULT

To highlight the difficulty of pinpointing exact numbers in the demand for sports footwear we can look at the example of football. On the face of it, this should be one of the easier sectors to quantify as the normal concept of a football boot is that it could only be used for its intended purpose unlike, for example, casual or running footwear.

First of all, we have to decide if we are talking about football or soccer because in the USA we could be talking about American football, which is different to European and other countries' concept of football/soccer. Second, there are the various forms of soccer players. They may be professional players, registered players, unregistered, referees, officials, indoor players and beach football players. The most difficult of all to quantify is the recreational player.

In 2006 FIFA released the findings of its 'Big Count', having contacted all the various football associations to ascertain the number of people playing the game. Its findings indicated the number of players as registered, unregistered and officials. In 2006, there were found to be an estimated 265 million players and five million officials, giving an overall total of 270 million.

By 2015 it is estimated these figures could have risen to 292 million players and 5.5 million officials. The 2006 survey had in turn indicated a 10% rise over that of 2000. Registered players in 2006 constituted 38 million (up 23%), whereas unregistered numbered 226 million (up 7%). There were also estimated to be 26 million female players.

Having estimated the total number of players, there is then the question of how many (if any) new boots they purchase or have bought for them in a year. This will vary from the top professionals having over 10 new pairs per year to a large majority not purchasing any new ones or not even having special football boots. Every time a World Cup or a UEFA European Championship takes place, there is speculation as to the standing of adidas or Nike as the two leading football boot suppliers and whom they are sponsoring. Other brands such as Puma, Sondico and Umbro are also important. The 'big two' are, however, proving difficult to dislodge and continue to be a strong force in the development and expansion in the use of football boots.

TWO COMPANIES DOMINATE

The sports footwear sector as a whole is dominated by two companies: Nike and adidas. It may be that there will be challengers to their duopoly although much resource and the attracting of role model and celebrity star performers will be an essential factor. For example,

Under Armour is starting to present itself as a strong challenger to adidas in the US market but is still very much stronger in apparel than in footwear, albeit making progress in the latter category.

In 2015 adidas sold 301 million pairs of footwear at €8.4 billion (49% of all sales), compared with 239 million pairs in 2011, an increase of 26%. It was also working on 'speed factories' such as the one at Ansbach in Germany which would allow decentralised flexible manufacturing and facilitate the production of a greater volume of footwear to meet 2020 targets. Nike was also working on the speed factory concept and in 2015/2016 achieved sales of footwear of \$18.3 billion. Under Armour in 2015 reached total sales of \$4 billion of which footwear represented 17.1% or \$0.7 billion.

COST BREAKDOWN

The public concept of sports footwear being overwhelmingly manufactured in low cost China is starting to become somewhat of a myth as adidas, for example, was making 41% of its footwear in Vietnam, 24% in Indonesia and 'only' 23% in China. An interesting study by Sole Review ('What does it take to make a running shoe') looked at the relative costs in bringing a running shoe to market (Table 1 & 2). It indicated that, typically, the cost breakdown of a \$100 running shoe would be approximately as follows:

Table 1	
Production	\$21–\$22
Freight, insurance & customs	\$5
Marketing	\$5–\$8
Expenses & overheads	\$11–\$13
Income tax	\$1
Profit	\$2–\$5
Retail mark-up	\$50

This does not mean that the retailer is making \$50 on the shoe however; his break-down is typically as follows:

Table 2	
Purchase price	\$50
Expenses	\$17
Income tax	\$3
Net profit	\$6
Discounts	\$24

BLURRED EDGES

The total production of sports footwear worldwide, together with the 'blurred edges' of what exactly constitutes sports footwear, has been thriving in 2015 and 2016. This is the result of a call for more healthier living, riding alongside the growing need to look better (Athleisure) and to achieve ever better results through having a technological edge. Or, to simply enjoy whatever sport you play. The growth of Athleisure can be typically seen perhaps through the rise of a leading UK sports footwear retail chain: JD Sports.

In the first half of 2016, JD Sports achieved a 66% increase in profits as the trend in the demand for sportswear as everyday clothing and footwear (Athleisure) continued apace. Sales grew by 20% in the six months to £970m, 50% from expansion and 50% from existing stores. The other part of JD's business comprises the outdoor chains Blacks and Millets. Bought for £20m four years ago, they are now making steady progress with losses halved to £2.3m. With the trend in glamorous camping (Glamping), this aspect of JD's business can be viewed as having a synergy with the Athleisure side.

JD continued its push into Europe by acquiring some European brands including more recently Perry Sport and Aktie Sport. It does not believe Brexit should dampen its progress, at least in the short term. There was also a move further afield as Next Athleisure (T/A Glue) of Australia has also been acquired.

The high profile of leading sports footwear brands and the need for high profile technical developments and 'star' endorsements, means that sports footwear will remain a very important sector within the shoe trade. With an estimated share of over 25% of all footwear, it is also perhaps the global Lingua Franca as well known sports shoe brands can be seen being worn everywhere in the world today. 

This article is based on extracts from the author's recently produced World Sports Footwear Review 2016 which gives further information on the market size of different sports in 2015 including baseball, basketball, football, golf, hiking and running, which are analysed together with data on over 300 sports companies, including manufacturers, suppliers and retailers.



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Striding towards good foot health

PROF. CHRIS NESTER, DR. CARINA PRICE, DR. STEWART MORRISON

When infants take their first steps it is an important milestone for families. It also poses many questions about foot development, footwear and how best to protect and support the growing foot. A significant challenge is just how little we actually understand about how feet develop. Thankfully, researchers from the Universities of Brighton and Salford in the United Kingdom have been awarded £1.5 million by the William M. Scholl Endowment Fund to undertake a five year research programme.

The programme will investigate what parents, health professionals and industry think about children's foot health and footwear, and how infant's feet develop during those first few months of walking. Their work is creating a new foot health initiative titled 'Great Foundations', which it is hoped will elevate the awareness of

issues relating to children's feet and foot health.

Our understanding of children's feet has remained largely unchallenged for several decades, and a greater awareness of how contemporary issues such as obesity, physical activity and social determinants of health affect child foot health is much needed. Advances in gait analysis and medical imaging techniques offer a unique opportunity to learn about children's foot structures and look at how feet change as they grow.

DEVELOPING FEET AND FOOTWEAR

Throughout infancy and childhood, the foot and lower limbs undergo a number of changes in response to the loads applied during physical activities such as crawling, walking and eventually running. Changes in foot

shape and the rotational alignment of the pelvis, thigh, leg and foot bones are expected and these typical developmental changes should follow a fairly consistent pattern.

Despite this, these changes are often poorly understood by both parents and health professionals and this can lead to anxiety and demands for access to healthcare and questioning of the role of items such as footwear. This may include using footwear 'too early', blaming footwear or seeing it as a means to 'correct' what are often perfectly normal stages of development.

In early walking, for example, the paediatric foot is a flat, mobile structure which lacks an underlying bony architecture. As the foot begins to develop and the main bones ossify, the medial arch of the foot begins to form. The development of the arch is ongoing and is often complete around 4-6 years

of age. It is therefore no surprise that the absence (or perceived absence) of the medial arch in children's feet is a common concern for parents.

Concerns about footwear and orthotic insole interventions often arise and worried parents might seek access to podiatry or other clinical services for orthotic intervention for their young children. The provision of orthoses for young children requires careful assessment and intervention is often not required.

It is therefore not surprising that parents increasingly turn to online communities and forums for information on how their children's feet should be developing. The concern here is that we know very little about what parents understand about their children's feet, where this knowledge originates from and how it influences their health behaviour in relation to footwear.

Online forums can empower parents in very effective ways; they can also result in unrealistic expectations, unnecessary concern, increased demands for access to clinical services and lead to the use of poor information about foot care and footwear purchasing habits. Yet, it is this understanding and the related foot health behaviours which set the trajectory for the future foot health of our children.

There is a real opportunity here for the footwear industry to step up to the challenge of supporting well informed public foot health messages, since it has considerable reach and gravitas. It follows that there are clear opportunities for aligning footwear technologies and innovations to the needs of infants that respect what we know about infant and walking development that can also be commercially viable.

MESSAGES ABOUT THE RIGHT FOOTWEAR

Footwear remains important throughout childhood and it is necessary that parents are well-informed of the appropriate features to look for in a supportive, well-fitted shoe. Issues about when to buy shoes, where to buy shoes and how much to spend on shoes have been around for years and still prevail today. Through their research, the teams at the Universities of Brighton and Salford will review the wide range of marketing



Starting to walk begs the question of when to start using shoes?

CREDIT: SALFORD UNIVERSITY

and educational materials produced by the footwear industry to inform parents about foot health and position footwear products appropriately or, perhaps in some cases, less so.

In regards to the provision of health materials, it is important that the industry works collaboratively and draws on the experience and knowledge of health practitioners. Clear, evidence-based messages are fundamental to helping educate parents and de-mystify the common misconceptions about children's shoes.

There exists an array of advice for parents such as footwear which states it promotes natural movement of the soft bones of the infant foot through flexible soles and uppers. Others have suggested less obvious links and benefits such as learning is improved if young children are barefoot in classrooms. Clarity and honesty of these messages is key to parents making informed choices to aid the foot health of their children.

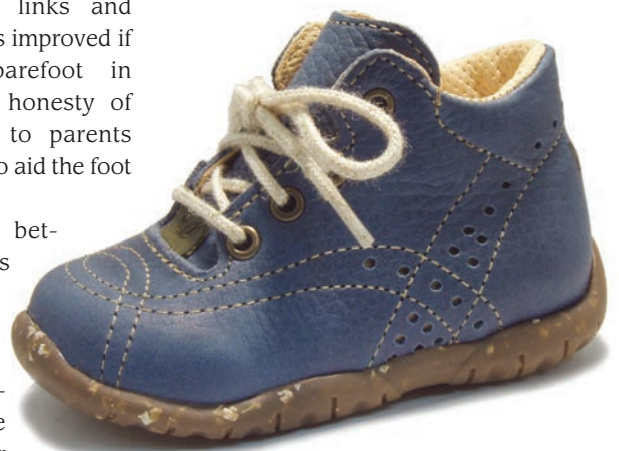
Greater collaboration between health professionals and the footwear industry (i.e. retailers and brands) is important for shared success and the empowering of parents to make appropriate footwear choices. It can open new avenues for footwear

development and product ranges too. Bringing together health professional and industry knowledge provides a unique opportunity to step forward to improve foot health for all. It can help fill any void between retail choices, purchasing habits and professional foot health advice, and link the messages from health professionals to those from footwear brands to mutual benefit.

Emerging trends in health and healthcare pose a number of challenges to footwear design, which can be met with successful delivery of health promotion and footwear education to wearers and designers alike. Prof. Nester and Dr. Price outlined the problems and opportunities that related to global changes in foot health related to the ageing population, obesity and diabetes (*World Footwear* Nov/Dec 2015).

A similar trend is emerging in child health with the increasing burden of childhood obesity. Childhood obesity places greater demand on the immature musculoskeletal system and its impact on the structure and function of the child's foot is well documented. It is therefore important that the footwear industry is responsive to this shift and takes into account the optimum materials that withstand the greater forces and wear-and-tear associated with increased body mass. The design and shape of the footwear is also key to ensuring the shoe offers appropriate space and protection whilst maintaining the required support and shock attenuation.

What is needed therefore is a consortia approach to meet children's foot health challenges and their implications for footwear, drawing in parents, health professionals with



Footwear design choices have a profound effect on foot behaviour and development.

CREDIT: KAVAT



Parents often listen to a range of opinions which is often unqualified insight rather than evidence-based information as to what is best.

CREDIT: SHUTTERSTOCK/SPEEDKING2

footwear industry partners, so that all voices are heard. This will create a genuine opportunity for shared learning and this is some of what the Great Foundations initiative hopes to achieve.

Footwear companies do of course cover a vast range in terms of position in the marketplace, business models, brand values and scale. Nevertheless, all are ultimately interacting with parents each day and affecting children's foot health each time a step is taken. The aspiration should therefore be to allow all actors in the footwear market to have a voice and to enable all those who can to take up and promote the best foot health messages.

Dr Morrison from the University of Brighton says: "Whilst the footwear industry is already listening carefully to parents in order to understand market issues, we want to explore the wider ones that drive parental perspectives so that these too can be blended into what the footwear industry understands about children's foot health. It is also important to have footwear sector issues raised by those dealing with them in healthcare and to work towards solutions together. This could be about future collaborative projects or simply better information sharing between health and retail sectors." The Great Foundations teams will be drawing together stakeholder groups from various sectors including industry partners and welcome any input.

UNDERSTANDING HOW FEET DEVELOP

An area that we perhaps know least about, and is most difficult to research, are the changes in the foot and lower limb that occur as children learn to walk and how the acquisition of walking affects foot development. In the first few months of life feet 'follow the legs' during rolling and crawling, but eventually they start to bear weight and then change rapidly.

Infants' feet are small and change so quickly that capturing these changes and relating them to walking development is very challenging. Dr Price and colleagues at Salford and Brighton have established unique 'baby walking labs' to monitor changes in skin, muscles, foot movement and pressures under the feet as infants develop from being barely able to stand, to walking independently.

We already know that applying load to feet is important for development and maintenance of foot and leg structures. This is evident from earlier studies on the effects of bed rest but also the effect of space travel, where a lack of weight bearing leads to loss of bone and muscle tissue and strength. However, we do not know how the first experiences of load bearing influence these issues as the ability to walk is gradually acquired or perhaps how the experience of learning to walk might affect development.

The baby labs are designed to replicate a typical crèche environment with developmental toys and bright, visual decoration. They also have pressure plates in the floor and cameras to monitor baby's movements. Dr Price says: "We are already noticing simple but important aspects of infant walking that differ from adult walking, such as the more complex directional changes involved and the more varied use of different parts of the foot across different steps." The teams hope to follow 100 children for 18 months as they learn to walk and use the data obtained to recalibrate both our understanding of foot development and the role of footwear.

WHAT NEXT?

Children's health and development is always an emotive topic. The footwear industry's contribution is often driven by those passionate about doing right by the children and their parents, and laying the foundations for normal healthy feet fit for an active and fulfilling life. The teams at Salford and Brighton want to support the children's footwear sector in a way that research has never previously done by providing a unique insight into parental beliefs and footwear behaviours, and by describing how feet develop around the time footwear is often first used. This requires good communication between the research team and those who can use the research. The Great Foundations initiative is an open invitation for members of the footwear industry to participate. If you are interested in further discussion, please contact us:

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Great Foundations initiative:

@GrtFoundations and

www.greatfoundations.org.uk

Prof. Nester is Research Programme Leader and Dr. Price, Research Fellow, School of Health Sciences, University of Salford. Dr. Morrison is Senior Lecturer in Podiatry, School of Health Sciences, Brighton University. 📞

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Lasts for correctly fitting children's shoes

Indeed, it had often been argued that the shoes produced as a consequence of this satisfied ethnic characteristics of the local population and so provided something of a guarantee for healthy footwear. Where the import of children's shoes had been controlled, their shape and quality could also be

controlled at a national level.

Attempts at unifying opinions and proposals for a common approach within the EU had so far failed in practice with the result that the selection of shape, dimensional proportionality and use of materials for children's footwear had been left to the will of manufacturers. Globalisation in footwear production had in fact led to an unfortunate deterioration of the conditions necessary for healthy children's footwear.

Another complication had been the violation of rules for traditional systems of labeling shoe sizes where the orientation numbering of footwear manufactured in other size systems had created chaos in the labelling of shoe sizes. In practice, this had made it all but impossible for parents to select and purchase footwear dimensionally and proportionally suitable for their children. Studies had shown as many as 60% of children were wearing dimensionally inappropriate footwear.

WMS KNOWLEDGE BASE

Nothing has happened in the past two and a half years that suggests the situation in general is any better today except perhaps in Germany. Germany has a well deserved reputation for producing extremely good children's shoes in terms of both quality and functionality. It owes much of this to the WMS quality seal of the Deutsches Schuhinstitut GmbH (German Shoe Institute) which is only granted to suitably qualified shoe manufacturers by the Federal Association of the German Footwear and Leather Goods Industry (HDSL). It therefore carries considerable weight and there are now over 800 WMS speciality shoe stores. During the more than 40 years of its existence, it has built up a formidable knowledge base that is continuously updated by scientific studies that monitor any ongoing changes in children's feet.

WMS prescribes standards that a good child's shoe has to fulfil. All manufacturers using the WMS label voluntarily undertake to meet these standards, as a consistently good fit cannot be guaranteed without a high standard of materials and workmanship. WMS manufacturers adhere to the statutory regulations for harmful substances and even voluntarily work below these. Any



The WMS foot measuring device ensures the best overall shoe fit is obtained.

CREDIT: HDS/L

manufacturer, trademark owner or importer who is able to satisfy the standards and guidelines of the WMS width measurement system can apply for the licence.

For quality assurance reasons, the licensee must also provide various documents testifying to its adherence to the WMS licence. The necessary certificates and documents are agreed with the PFI (Pirmasens Testing and Research Institute), in particular, a Certificate of Last Development and a Certificate of Fit Inspection.

Children's feet can have the same length but differing widths. The WMS foot measuring device enables a shoe size consisting of length and width, and taking into account the line of the ball of the foot and the big toe to little toe angle can be calculated. There are three widths; W (wide feet), M (medium width) and S (slender feet).

In addition, the system also allows for children's motor function, the missing suppleness when a little child starts to walk and the problems when slipping the foot into the shoe. The bones of growing children's feet are soft and thus easily deformable—especially with regard to length where the most rapid growth occurs particularly in the early years—so all these measurements are important when designing children's lasts.

EXPERIENCE KNOWLEDGE BASE

A second knowledge base as far as German shoe manufacturers are concerned is that of last maker Fagus-GreCon Greten GmbH & Co. KG, which has a very long history in the industry and is the only major lasts manufacturer left in Germany. Its founding father, Carl Benscheidt, was born in 1858 to a Westphalian farming family and as a young man wrote newspaper articles criticising the inadequate shapes of the lasts used for shoe production. This led to the establishment of his own last makers in Hanover, soon followed by his own shoe factory in the years prior to WWI. Needless to say, Fagus has acquired a great deal of knowledge since then in regard to feet and lasts of all types.

As sales Manager Haymo Bertram says, "We have a last know-how, especially for children's feet, of more than 100 years. Struggling for the perfect fit is a responsible task in the dialogue with the shoe manufacturer. For this end, it is important to have access to modern findings as well as to the experience that a last manufacturer has. This knowledge is necessary in order to give children's lasts the correct contour, to take into consideration the correct heel tip or the correct heel height for grading the size.

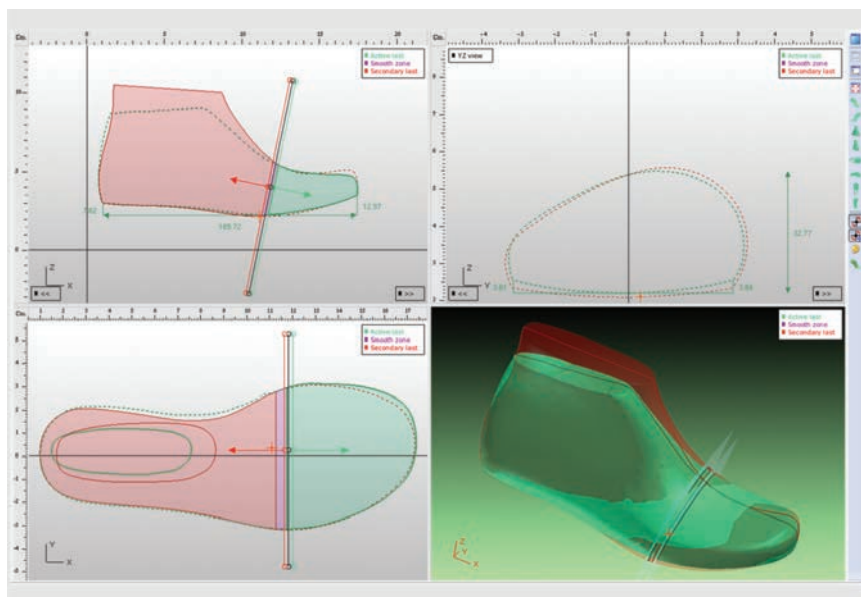
"In this case, again the WMS table provides for a guideline which illustrates the different stages of development up to the foot of an adult. Three different widths are covered and can be considered valid throughout the country. Thus, it is possible to develop a basic mould in which three variants are possible using different insoles. Another more costly possibility would be a width system with individual lasts and shoes. A third possibility for a perfect fit would be a scanning system which determines the optimal shoe for the scanned foot but this would then require full customisation in manufacture, which would be even more expensive."

POOLING KNOWLEDGE

Dialogue and cooperation have a profound influence on product development in the German children's shoe sector as regards perfect fit and foot health. Companies involved receive constant feedback on problems with fit and the success of development steps taken to improve things. Haymo Bertram goes on to say that "Having an ear to the market, participating in the design and asserting one's experience and knowledge is the quality that experienced actors in the industry have. Long-term cooperation helps Fagus to develop its own standards and in turn to positively influence the quality of children's shoes generally."

Although all this valuable information is readily at hand, it still needs to be converted into lasts that not only fully reflect, but, are also made to, the degree of accuracy demanded by modern shoe manufacturing techniques. To this end, Fagus uses both modern and traditional technologies. It creates the models for 90% of its lasts in CAD so that a basic file exists from which the final last and sole moulds can be directly machined to the very finest tolerances. For instance, where direct sole moulding is to be used, minimal tolerances of around 0.20 mm are required for both moulds and lasts to ensure no material is exuded during the injection stage and that the upper is not pinched off.

The company also employs skilled hand model makers who contribute experience and market knowledge to



Fagus creates 90% of its model lasts in CAD.

CREDIT: FAGUS

fine tune designs where needed. Shoe lasts are very complex objects and, even in today's digital world, there is still room for craftsmen who have a real 'feel' for what they produce. These hand craftsmen still shape model lasts using rasps and files in exactly the same way as their forefathers and their skills cannot be gained over night but call for several years of training. This was once possible at a footwear college but now the company trains both modellers and last makers itself.

WHOSE RESPONSIBILITY

All of this adds up to shoes that will protect the health of children's feet and ensure they grow up to a healthy adulthood as far as this aspect of their lives is concerned. It does however rely on feet being regularly measured and new shoes bought as required; this is where it often all goes wrong. Children's feet grow fast, as much as two or three sizes a year, beginning at about 12 months of age. The growth rate of young children's feet is however sporadic, with the most rapid period of growth occurring within the first 10 years. Shoe size should therefore ideally be checked as follows:

Age	Checked...
1–6 years	every 2 months
6–10 years	every 3 months
10–12 years	every 4 months
12–15 years	every 5 months

While totally desirable from the child's point of view, it does mean a considerable financial outlay for parents where top quality shoes are involved and, while there are a good number who will always buy the best shoes for their children regardless of price, there are many more who would also like to act in the same responsible way but who simply cannot afford them, particularly where there is more than one child involved. These parents are forced to turn to cheaper imported shoes—often from the Far East—made on lasts that are frequently designed with more of an eye to fashion than the child's health and from retail outlets or internet sites where no foot measuring is available.

Far too many of these children suffer from foot problems as a result, problems that will follow them throughout their lives causing them pain and their governments needless expense in treating problems that should have been prevented in the first place. If a last is designed correctly with due consideration given to all the physical requirements of children's feet at their corresponding ages of growth, the shoes subsequently made on them will not cause problems regardless of how much they cost.

If all children's shoe outlets could be made to offer a proper measuring service along the lines of Germany's WMS System and all last makers were encouraged to follow it, we would take a major step forward in children's foot health. 🍀

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A link between foot-scanning and lasts



Recently retired director of Spanish footwear research and technology centre Inescop, Dr César Orgilés, has said the footwear industry ought to be proud of the readiness with which it embraces new technology and works to incorporate new materials and other innovations into finished products. Examples he gives of shoe manufacturers' use of "some of the most advanced technologies available at the moment" include nanocapsules to generate comfort, antimicrobial functionality and foot health properties to shoes, biotechnology, the treatment of materials (including leather) to make footwear biodegradable, robotisation of production, computer-aided design, automated cutting, and the scanning of feet to improve production and to make it easier for manufacturers and brands to offer personalised shoes.

Footwear research centre Inescop has established a new method for scanning the foot, with the data connecting to an archive of digital lasts to let consumers know which lasts, and therefore which shoes, will provide the closest match to their feet.

"All of these developments have helped reduce design lead-times and have made it much easier for footwear companies to make the changes imposed on them by fashion trends," says Dr Orgilés, whose services Inescop has retained as a consultant. "Footwear manufacturers are using these technologies to make it economically viable for them to make small collections and even personalised shoes. Personalising shoes, using this combination of innovations, is becoming increasingly popular."

DATA MATCHING

In keeping with this, one of the most recent innovations to have come from Inescop's own work is a new system for producing 3D scans of the foot, which can then be matched up to information stored digitally about lasts. A partner company, Alicante-based software developer Red21, has launched a new digital lasting application, Forma3D.

Using existing scans of lasts, the software tool allows users to create new lasts by comparing, combining



Dr César Orgilés, recently retired director of Inescop, is an admirer of a new idea linking foot scans to digital lasts.

and tinkering with the information in the database, adjusting widths, toe-shapes, heel-drop and so on as desired. Manufacturers can then use the new data to produce the physical lasts that they need to make their latest collections of shoes and boots.

FROM DIGITAL TO PHYSICAL

"Automation always brings some challenges," Dr Orgilés explains. "In theory, production processes should become easier when we have a real shoe on a real last and everything takes a physical form. But one difficulty remains: lasts at this stage are physical objects that we make mechanically and it's only natural for there to be small discrepancies between the physical last and the digital one, leading to differences between the size of a shoe and the actual size of the foot it's meant to fit." He points out that the temperature changes and the mechanical stresses that lasts are subject to during the manufacturing process can also cause "variations" in its dimensions, and that this, too, can have consequences. He says you only have to look at a last when it is completely new and then look again when the same last has been through the production process a number of times to see the strains it has to endure

and the wear and tear it will show as a result. "Inescop's suggested solution is our new system that scans each foot in a complete way in just a few seconds," he says.

MEASURE FOR MEASURE

One of the first people to subject her feet to the new 3D scanner, in the summer of this year, was Spanish actress Marta Hazas. Ms Hazas, voted Spain's best shod woman in 2015 (an award that the national footwear museum in Elda presents every year, with the winner usually donating a pair from her own collection), agreed to try the technology out.

The scanner takes 25 separate measurements of each foot, defining its form and structure. Now Marta Hazas will know exactly what her shoe size is, César Orgilés explains. And it works both ways. Inescop says the data the 3D scanner collects can be matched up with lasts and digital lasts that the organisation already has in its library. When Ms Hazas, or any other consumer, makes the comparison between foot-data and lasts in the library, it will be clear which shoes (those made by manufacturers that have used the best-matching lasts) will fit her as closely as possible to perfection. 

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Managing foot comfort

MONIKA RICHTER, PFI, GERMANY

Comfort in wear of stockings and shoes depends to a considerable extent on the effectiveness of their thermal and moisture management systems. Indeed, shoe manufacturers actively promote properties such as water vapour absorption and permeability, promising dry feet and comfortable foot temperatures for the wearer. These properties are exceedingly important for shoes which are intended to be worn during intense physical activities as, for example, trekking shoes, safety shoes or those for the military and police.

Practical experience shows that frequently there are problems with this aspect of foot comfort and this is a reason why many safety shoes are not worn when they should be. In addition, the discomfort of wearing shoes with poor thermal and moisture management heightens the risk of accidents and the resultant injuries to feet.

Safety footwear standards take into account only water vapour absorption and permeability of the upper materials used. Soles, steel toecaps, steel insoles and steel heel caps—which are all impervious—have not been considered. There are only fairly basic technical works dealing with the overall relationship between foot, stocking and shoe. Most of these investigate only one component in isolation and not the interaction between all of them.

THE PROJECT

Test and Research Institute Pirmasens e.V. (PFI) and the Hohenstein Institute of Textile Innovation gGmbH (HIT) have recently completed a research project with the aim of investigating the influence of shoe and stocking construction on the climate found inside the shoe during everyday working situations. The overall foot/sock/shoe relationship in all types of safety shoes has been carefully analysed when worn during intense physical activity. Although the results obtained from this investigation concern safety shoes, they will be



Measuring temperature using thermal sensors inside the shoe.

CREDIT: PFI

equally applicable to other types of footwear.

It is the first time that a systematically varied sample selection has been used to analyse this complex relationship and has proved useful in resolving some previously unanswered questions. The scientific aim was to develop suitable actions to regulate moisture and thermal balance in the system. This can be best reached by well-directed use of materials in both stocking and shoe.

The spectrum of the most used materials was found to be very great, so five were selected from each type. Twenty-five combinations were then tested with the PFI Comfort Tester (Figure 1) and the Hohenstein Institute Sweating Foot device (Figure 2). These simulate different methods of sweating. The Comfort Tester uses water vapour, while the sweating foot device uses drops of water forced out of small holes in the 13 elements of its metal foot to simulate perspiratory glands. This

device can also allow a simulation of thermal management conditions.

TESTS

Both short time and long time tests were made using the Comfort Tester. The former simulates the high demand caused by intense physical activity and drying of the foot. The latter simulates a complete working day with all the variable demands that implies. Figure 3 shows the course of the short time test. The combined components of the foot/stocking/shoe system were weighed at the beginning of the test and at a further two points in the cycle (weight) as shown. The differences in weight of all the components were then compared and analysed.

The tests carried out using the sweating foot device consisted of three phases of 60 minutes each (Figure 4). The thermal transmittance and water consumption of the sweating foot were recorded and analysed for each phase and element.



Figure 1 – PFI Comfort Tester.

CREDIT: PFI



Figure 2 – HIT Sweating Foot.

CREDIT: HIT

RESULTS

The results of both types of test showed that it is very important to view all components as a system. Stockings have an immense influence on its overall properties. They can block or support the transport of moisture from the foot into the shoe. The materials of the shoe determine the quantity of moisture absorption from the stocking and the evaporation to the environment. Different materials achieve different evaporation rates.

Textile shoe and stocking materials containing cotton and polyamide provide best moisture transport. Leather materials absorb a high quantity of moisture but need a long time to transmit it. The tests delivered further details regarding water vapour permeability resistance. The different combinations showed different values, with a shoe having a leather upper and lining having the highest resistance. The lowest values were achieved by shoes with a textile lining and one incorporating a membrane. As regards stockings, the lowest resistance was achieved by one made using a blend based on polypropylene. Stockings of wool and a mixture of wool and polyamide showed the highest resistance.

WEAR TESTS

It was also thought necessary to complete the project with subjective assessments by real people, so tests were carried out under different physical activities. PFI combined the subjective assessments with the measurement of the temperature in the shoe (see title image) and the weight of stockings and shoes before and after

the test. The two young men involved were asked to rate their perceptions concerning temperature and moisture.

The results showed that the combination of stocking and safety shoe under test was unable to transport moisture from the foot during high physical activities. The test persons felt their feet as being uncomfortably wet after only a short period. (*Any temperature over 33°C has to be regarded as too warm*). Even so, they were unable to clearly differentiate between thermal and moisture sensations. They did however rate the leather shoes as being more comfortable than the textile ones.

The tests carried out by HIT favoured textile shoes or those with a textile lining, where the measured data showed a tendency to lower moisture. The leather shoes and shoes

with a lining of wool showed a higher level of moisture. The test subjects rated the temperature at the foot as too warm due to the combination of stocking and shoe. The most uncomfortable was the leather shoe with a wool stocking worn during the complete test duration time.

These tests have indicated a wide range of individual ratings and deviations in the simulation tests. The results make clear that further research activities in this field are necessary. Stockings and shoes must be considered as a combined system and it should be possible to improve the properties of the system and achieve noticeably better comfort for the wearer.

Full results of these tests can be obtained from PFI. 📄

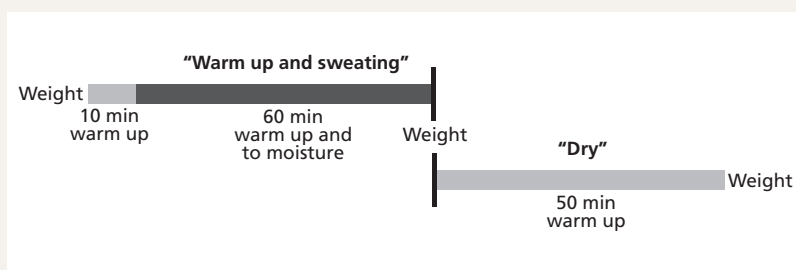


Figure 3 – Course of short time test.

CREDIT: PFI

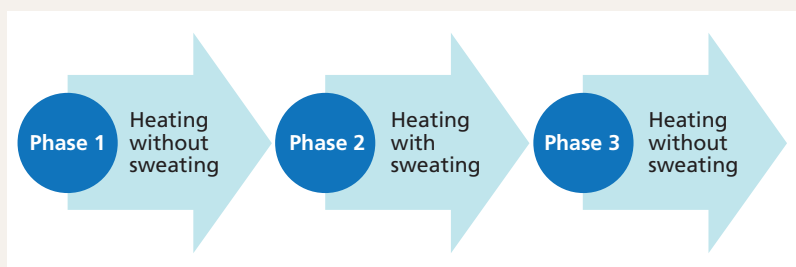


Figure 4 – Course of HIT test.

CREDIT: HIT



In with the old

Adidas teamed up with musician Pharrell Williams for the Supershell collection, adding a modern flourish to the classic Superstar silhouette.

CREDIT: ADIDAS

According to a report on the US athletic footwear market from research organisation NPD Group, 2015 was the year of the retro shoe. This category was worth \$3.5 billion last year, meaning it claimed a 20% share of all athletic shoe sales in the country. What's more, while the US athletic footwear market grew by 8% year-on-year in 2015, sales of shoes that NPD classified as 'classic' increased 30%, much faster than any other category. The rise in popularity was not confined to men's shoes (+26%), with retro models increasingly popular with children (+29%) and women (+69%). Retro running and tennis shoes sold well, but reissued basketball sneakers were most popular.

Trendsetters

Sportswear manufacturer adidas values its line of heritage products highly; it has a separate division, Originals, which releases items inspired by the designs from the 1940s through to the 1980s. As well as footwear it features shirts, coats and bags. In 2015, a surge in the sales of Originals products was key to the company achieving revenue growth of 10%. During this period, footwear sales across all divisions jumped 19%, compared to a 5% rise in revenue from apparel. The most successful retro product in the Originals stable is the Stan Smith tennis shoe, which has retained a strong following since its initial release in the 1970s (when Stan Smith won two tennis Grand Slams). Arthur Hoeld, Originals general manager, describes the Stan Smith as the "backbone" of the division's success. During 2015, adidas sold 8 million pairs of classic Stan Smiths, prompting Herbert Hainer, who recently left his role as

It may seem a contradiction but retro shoes are in fashion; footwear brands are counting on the popularity of reissued models to boost their sales.



The Stan Smith has made its way from the court to the street, becoming one of adidas' best-selling shoes of all time.

CREDIT: ADIDAS

adidas CEO after 15 years, to label the model, as well as another of the company's classic shoes, the Superstar, as the "driving force of sneaker culture".

The Superstar, which dates back to the late 1960s, is one of a number of successful retro shoes that were first worn on the basketball court. The most famous of these is the Air Jordan from Nike. First conceived for, and endorsed by, US basketball legend Michael Jordan, it has been a crucial part of the brand's offering for more than 30 years. The Air Jordan remains incredibly popular, despite it being more than 20 years since the iconic athlete from whom they take their name finally retired from professional sport. Nike and adidas are now pressing ahead with plans to reissue iconic tennis and basketball shoes from the 1960s; they see retro models as an essential part of their business.

Dual appeal

The target market for reissued shoes is diverse, extending not just across the sexes, but also across the generations. Older consumers, who remember them from their initial release, are driven to buy by a sense of nostalgia. To younger people, classic shoes aren't classic at all; they see them with fresh eyes as if they were a new product. Retro has become a term used by the younger generation to simply describe a style of footwear.

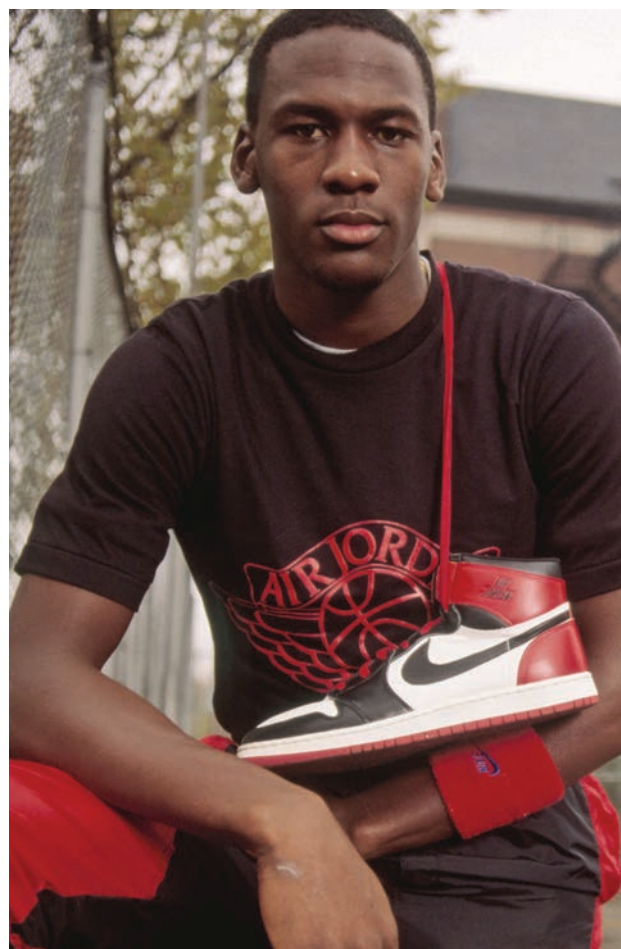
"I find that in this technological age where everything is moving incredibly fast, it is comforting to be grounded in a timeless footwear design," Rian Pozzebon, head of footwear design at VF-owned brand Vans, tells *World Footwear*. With the world changing at an astounding pace, there is something comforting in a retro shoe.

Vans, which celebrates retro through its Classic, Authentic and Old Skool product lines, made an important contribution to the



Vans has stayed true to its range of classic designs for over half a century. The brand continues to perform well without the need for major changes to its products.

CREDIT: VANS



Nike's Air Jordan range, designed for US basketball star Michael Jordan (pictured), has made a significant contribution to the brand's revenue for over 30 years.

CREDIT: NIKE

revenue of VF in the first nine months of this year. At a time when VF's other marque footwear brand, Timberland, is suffering a dip in sales in the US, Vans recorded a 4% increase in sales in the second quarter and helped VF bank a small growth in revenue. This continued in the third quarter of the year as 7% growth for Vans helped VF limit its overall drop in revenue to 1%.

Jon Epstein, president at Fila North America, describes his company's heritage category, which includes apparel as well as shoes, as a "huge business driver". He says Fila feels it has the opportunity "to inspire a new generation of consumer" with its Vintage collection.

It is incumbent on footwear companies to continually update their reissued products in order to appeal to a younger generation. As consumers, this demographic is crucial, as they are more likely to replace their shoes every year as trends and styles evolve. Attracting them also gives brands a steady supply of new long-term customers. Collaborations with celebrities have long been a sure-fire way to attract the attention of younger consumers. Adidas turned to singer and record producer Pharrell Williams for a reboot of its Superstar sneaker. Mr Williams had an important role in the design of the Supercolor range, which retained the classic Superstar silhouette but was available in a choice of 50 colours; adidas said this represented a celebration of diversity. He also worked on the Supershell, another collection inspired by the Superstar, helping to design unique artwork which featured on the toecap



of the limited-edition model. It formed part of a project that saw the brand work with artists around the world to give a fresh look to a classic shoe.

Evolution

To keep their retro shoes relevant, brands need to go beyond aesthetic modifications. Nike, which says it sees “strong value in celebrating our heritage”, incorporates the latest innovative materials and technologies into reissued models. Its Flyknit material, made from recycled plastic bottles, was used in a recent update to the Air Jordan, as was the FlightSpeed cushioning system, which helps better distribute weight and offers increased energy return on contact with the ground.

Converse, a part of the Nike empire since 2003, has had great success with two retro sneakers – the Chuck Taylor and the All Star. The Chuck Taylor started life as a cutting-edge basketball shoe nearly a century ago and has remained a bestseller ever since. In 2015, Converse introduced the Chuck Taylor II, the first time the iconic product underwent any real design changes in its hundred-year history. The changes were designed to make the shoe more comfortable but they were met with a largely underwhelming response from the public, who preferred the original design.

Converse takes full advantage of the increased research and development resources at the disposal of parent company Nike. The Chuck Taylor II featured a lightweight insole and Nike’s Lunarlon sockliner foam cushioning technology, one of the changes designed to make it more comfortable. In June this year, Converse unveiled an updated version of the All Star sneaker; it stayed true to the classic design but incorporated state-of-the-art materials. The upper is made from Nike’s Hyperfuse fabric, which uses three fused layers of material to offer durable shoes with good breathability. The base layer is a supportive synthetic material, the middle consists of a mesh to make the shoe breathable, and the outer layer is made from thermoplastic polyurethane (TPU) film for extra durability. It also has a TPU-fused overlaid toe cap, and neoprene split tongue and lining to make the shoe lighter.

Converse incorporates the latest technological advances from parent company Nike into its retro designs, including the All Star.

CREDIT: CONVERSE

Here to stay?

Bjørn Gulden, CEO of German sports group Puma, says “heritage sneakers are an important part” of the company’s plans. He cautions, however, that this may not be for long as “trends come and go”. Puma maintains a range of retro shoes via its Classic line, which includes the Classic Suede, first released in the later 1960s.

It is likely that the term ‘retro’, when used in relation to footwear, will always refer to classic designs from the late 1960s, 1970s and 1980s. Nevertheless, Rian Pozzebun at Vans believes there are some modern sneaker models that could grow to be considered retro in the future, although he says “not all retro shoes are enduring”. There is a risk of classic designs losing their appeal if they are excessively reissued by brands. There are also lessons to be learned from the limited success of the Converse Chuck Taylor II. Although it is important for brands to ensure reissued products remain fresh, either by tweaking the design or incorporating new technologies, try to change too much and the product could lose the identity that made it a success in the past. 🔗

Puma’s Classic Suede.

CREDIT: PUMA



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Kenyan start-up Enda believes the country's reputation as a producer of world-class runners means it should be capable of also producing world-class running shoes.

Enda targets pacesetters of running shoe market

Look down the list of medallists at every middle and long-distance running event at the Athletics World Championships or Olympic Games in the last 30 years (for both men and women) and there will likely be a Kenyan flag alongside at least one of the names. The East African country has a rich history of producing runners capable of defeating the best athletes the rest of the world has to offer. No Kenyan brand has yet capitalised on this domination to launch an elite running shoe; start-up company Enda is trying to do just that. It has launched the Iten shoe, named after the town that is home to Saint Patrick's High School, where several of the nation's greatest athletes, including legendary 800 metre runner David Rudisha, spent their formative years.

Enda means 'go' in Swahili, an apt name for the company given the nature of its product. It was founded by Navalayo Osembo-Ombati, a trained lawyer and accountant from a village near the running heartland of Eldoret, and Weldon Kennedy, a US native with a background of working with social change start-ups. Describing their venture as a "social enterprise", the co-founders want to do more than develop an elite running shoe; they hope their success will contribute to improving the lives of ordinary Kenyans.

Ms Osembo-Ombati admits there are "lots of challenges to making a great running shoe", the most significant of which is the up-front costs. Enda set up a campaign on crowdfunding site Kickstarter to help get the project off the ground, easily surpassing the initial target of \$75,000 set when the campaign launched as recently as May this year.

Focus on design

The technical skills and expertise required to create a high-performance running shoe has meant "working with experienced designers and developers was essential", Ms Osembo-Ombati tells *World Footwear*. Enda recruited Steve

Burris, a designer who has developed sport shoes for consumers and athletes during time spent at adidas, Nike, Reebok and New Balance. The start-up took advantage of his strong relationships with suppliers to source high quality materials. It also worked with Birdhaus Design, a studio that has designed and manufactured athletic shoes for Under Armour, Reebok and Keen. The Iten model went through a prolonged design and prototyping process; an estimated 10-13 versions were produced before it settled on the final design.

"Competing with established brands comes down to satisfying the needs of runners better than anyone else," Ms Osembo-Ombati says. "From the very start we listened to Kenyan runners about what they wanted from a shoe."

The result is the Iten, a shoe with a 4mm difference in height between the padding at the heel and at the forefoot (around half the drop of a conventional running shoe). This encourages the wearer to land on the mid-foot or forefoot, the preferred technique of many of Kenya's most successful runners. Enda says too much foam under the heel will result in it hitting the ground first; not enough cushioning on the heel and the runner will have insufficient protection on rough terrain. It has attempted to find the middle ground between a training shoe and a flat shoe designed for racing; the Iten is comfortable enough to be worn during long training sessions but light enough to allow the wearer to run quickly in

Enda enlisted experienced Kenyan runners to test the prototypes of its shoe and their feedback was vital for the final design.

ALL CREDITS: ENDA



competition. It has a lightweight, flexible and breathable upper. A wide toe box prevents the toes being squashed, promoting a natural splay of the toes, which helps evenly absorb the impact of hitting the ground. The midsole has been brought up to cup the heel so that the shoe moves with the foot. This is beneficial on uneven terrain when the foot impacts at an unusual angle or rolls slightly on impact. It is made from high-abrasion ethylenevinyl acetate (EVA). The full rubber outsole has an "earth-hugging" tread pattern for good grip.

Tribute to Kenya

There are nods to Enda's Kenyan heritage in the Iten. It will be available in the colours of the country's flag - red, black and green. The company's logo, a spear tip, also takes its inspiration from the flag, which features a shield with two crossing spears. The word 'Harambee', an official motto of Kenya meaning "all pull together" in Swahili, is written under the sole. It represents a tradition of communities coming together to achieve something that they could not achieve individually. The side has 12 lines in honour of the date the country became independent – December 12, 1963; it became a republic one year later. The design on the heel is based on the country's Great Rift Valley, from where many of its best runners originate.

Ms Osembo-Ombati says the company "wanted to make sure it stood out as a fashionable shoe", which could be worn during leisure time as well as on the track or road.

Giving back

After what it describes as "tremendous success" with the Kickstarter campaign, Enda says it now has enough investment to ship pre-ordered shoes to its first 1,000 customers as well as fulfilling some wholesale orders. It aims to start shipping in early 2017 following a slight delay caused by a change in upper supplier and the company wanting more time to perfect the moulds needed to create the midsoles and outsoles. It plans to embark on another round of investment to increase its inventory and to finance marketing efforts. Ms Osembo-Ombati says it has already started to design its next model and to "plot out the process of launching a complete product line".

At present, the only aspect of manufacturing that takes place in Kenya is the final assembly; the materials and components are sourced from China. She explains that even though there



Company founders Navalayo Osembo-Ombati and Weldon Kennedy believe Kenya should benefit from its reputation as a running powerhouse.

"aren't all the right people with all the right skills" to manufacture the shoes in Kenya, "there are enough people to get us started"; they are capable of assembling the product and doing the injection moulding. Enda aspires to gradually increase the amount of the manufacturing that takes place there, with an end goal of a shoe 100% produced in the country. This ties in with its desire to create jobs in a country where youth employment stands at 17.4% (according to the World Bank). The African Growth and Opportunity Act (AGOA), which gives certain products (including footwear) from sub-Saharan African countries duty-free access to the US market, works in its favour. Kenya's AGOA status was recently renewed for a further ten years by the US Congress.

The company feels it has an obligation to share any potential success with the people of Kenya and plans to support local community projects. When fully operational, it will set aside a portion of its profits to this end after identifying the charitable initiatives most in need of help. By offering those who contribute to the online funding effort the chance to vote on which ones it supports, Enda hopes to connect runners from all over the world with local projects in Kenya. It believes it is time for the country to benefit from the incredible achievements of its athletes. By offering "a more socially responsible choice of running shoe", it is confident of success.

This will allow it to "have a positive impact in communities with the greatest need". Ms Osembo-Ombati acknowledges that competition in the running shoe market is fierce, but insists Enda is "ambitious and stubborn enough to overcome the challenges".



The Iten shoe will be available in red, green and black, reflecting the colours of Kenya's flag. There are several tributes to Enda's heritage in the design.

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