



Regional Commentary: China



China—the 21st century phenomenon

Everyone today is an expert on China, or at least has an opinion. China has swallowed the majority of the world's leather industry at a speed that matches the uptake of the Internet. Some brands have become totally wedded to sourcing there, while others are adopting the new 'China-plus-one' policy of not putting all their eggs into one basket. Others are trying to limit sourcing to just 30% of their requirements looking to Eastern Europe, North Africa or Latin America for the rest. All of the major chemical companies now manufacture there, even if it is their more basic products, and everyone, whether they like it or not, is affected in one way or another.

In 1997 China produced almost 48% of the world's output of footwear, by 2005 it was close to 60% and estimates suggest it will hold a 61%—or some nine billion pairs—by 2009. Between 1997 and 2004, the country's Gross Domestic Product (GDP) grew by a staggering 83% to almost \$1,665 billion. China is, without doubt, the industrial phenomenon of the 21st century and will overtake America in the not too distant future. Although tariffs were recently applied by Europe, the Chinese Leather Industry Association responded quickly and it is notable that few importers have pulled out of China as they remain more than content with their Chinese suppliers.

Efficient, too

The efficiency of the Chinese industry was highlighted after 9/11 in the USA. Following the event, many US companies

reduced their travelling and left their Asian partners to complete the season's range with very limited face-to-face contact. Almost without exception, the results were satisfactory and changed the view of the competence of Chinese manufacturers.

As far as the leather and footwear industries are concerned, China was a latecomer in the transfer of production from high-cost countries to low-cost ones. The process began in South Korea and Taiwan during the 1960s which resulted in the economies of these two countries developing so rapidly that labour costs soon became too high for low-cost shoe-making. By the 1970s, there was a move to set up substantial shoe manufacturing facilities in Thailand and Indonesia. Hong Kong, meanwhile, was becoming a major service centre for the region's footwear industry.

The big breakthrough for China came in the 1980s when the government opened up fourteen coastal cities for manufacturing and began to allow foreign investment. Hong Kong and Taiwan saw their chance and transferred complete shoe factories with modern technology to mainland China. This laid the foundation for China's exceptional growth as a footwear producer. The Hong Kong Chinese began in Guangdong in 1981. A year later, the Taiwanese set up facilities a little further north in Fujian.

Rapid industrialisation has also resulted in higher per capita income and consumer growth. Therefore, domestic demand for leather products and footwear is also set to expand enormously. The sheer size of the

domestic market makes China unique in Asia in this respect, with the notable exception of India. It is quite conceivable, therefore, that much of the Chinese leather industry's future expansion will likely be absorbed by its domestic market, leaving exports to peak at around 65% of world output.

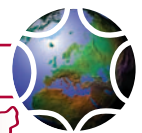
Keeping up with the pace

The leather industry is one of China's traditional industries. However, it grew swiftly in order to support the footwear industry following the initiation of economic reforms in the late 1970s and 1980s. In less than twenty years of rapid development, China has become the world centre for leather processing. According to recent government statistics, China now produces some 30 million pieces of bovine skin, 99 million pieces of pigskin and 200 million pieces of goat/sheepskin annually.

In the last few years, foreign investment has played an important role in the leather and leather-related industries. It is suggested that there are over 2,000 tanneries and leather goods manufacturers in China which have been built with an element of foreign investment. These companies are generally clustered around the fastest growing economic regions in the eastern and south-eastern provinces. The participation of foreign investors has enriched the domestic leather market by bringing in high product quality standards and more product varieties. It has also stimulated exports.

There are many locations in China which have become known as 'Leather

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Cities' with none more important than Dongguan in Guangdong province, which is undoubtedly the footwear capital of the world, dominated by the new world powers of footwear: Stella and Pou Chen (See map for major centres of production.)

Within the industry, leather footwear remains the dominant activity contributing about 65% of total output value. Since the 1990s, China has established itself as the world's leather shoes exporter. Leather shoes and leather garments are ranked third and 14th respectively for Chinese exports in terms of value.

Increasingly important is upholstery led by the rapid growth of the Chinese automobile industry. Passenger car sales in 2005 reached 2.7 million, which were mainly bought by people in the 30-40-year-old category. The proportion of cars sold in China with leather upholstery far surpasses the world average and the demand for locally produced leather is very high. By 2004, urban disposable income had increased to \$1,190 and with the Chinese middle class expanding so quickly this can be expected to accelerate.

Widening the horizons of investment

Despite some current issues relating to tariffs and taxes on raw hide imports—



which are indicative of the country's concern about pollution from tanning raw hides, and the high use of energy in the early tanning stages—the Chinese leather industry is still seeing significant growth in investment. According to government statistics, during the period January to May 2006, investment increased 46% to reach RMB7,761 million (\$970 million) from RMB5,319 million in the corresponding period a year earlier. Foreign investment over the last few years has had a dramatic effect on the development of the industries to the extent that some view joint venture tanneries as a totally different segment from the domestic ones.

Initially, many of the shoe materials required, including leathers, sole units and components, were shipped in from the principal's home country. This made it easier to maintain quality standards and delivery schedules, but in a fast-moving and highly competitive fashion industry such as footwear, suppliers saw the importance of having a manufacturing base close to their customers and have now relocated their production to China too.

The next development phase has seen many tanneries in China turned around from outdated State production units to ➤

Australian hides go full circle

In terms of furniture upholstery, Chinese products have always been viewed as fairly low-cost and low quality in the global market, but, this is changing. The Zhenxing Leather Company, in Niuhoa Town, Sichuan, imports all of its bovine and buffalo hides from Australia. 70% of the tannery production is for the furniture industry and 20% is used in the manufacture of leather seats for automobiles. After processing, the hides are transported to the company's factory in Shanghai, where sofas and chairs are produced. All of its production is exported abroad, some even going back to Australia. *World Leather* was given a guided tour around the plant, and you could have been forgiven for thinking you had inadvertently strayed onto a university campus. The tarmac avenues around the plant are clean and each of the processing buildings is separated from its neighbour by wide lawns. You only become aware that you are in a factory when you see that each building is festooned with safety notices and signs and hear the low hum of machinery.

The chief designer, He Xiao Lan, showed us around the car seat production area and explained that as many as 50 different templates are necessary to make one seat. It offers two options to its customers: supplying the cushion complete with leather upholstery, or the leather cover alone.

He Xiao Lan explained, "We began with leather garments back in 1983. Currently we make about two million garments a year with all the pigskin coming from Sichuan Province. The annual production is now 16.5 million square feet and most of the garments are exported to Russia and Kazakhstan."

In 1995 the company started to process leather for the furniture industry. "We have our own factory in Guangzhou, which caters for the domestic demand. Another owned factory is in Shanghai, and all of that production goes to the USA, Australia and Europe," she said. "Or put another way—we have an annual capacity of 62.5 million square feet for both factories." Today the company exports about 2,000 high cube 12 metre

containers per year. The car seat business began in 1997 after it was approached by Toyota and the business now supplies several companies in China.

"We started up our own office in Melbourne in 2000. It has an Australian manager and we found that we could save on purchasing costs. Although the cost of the leather is higher than elsewhere on average, the quality makes it worthwhile. In 1998 we came under the umbrella of the Hebang Group of companies and, through them, we obtained a large loan from the International Finance Company of the Netherlands to expand and modernise the factory. When we first started we had a staff of 100, and now we have 10,000. All of the tanning machinery is from Germany," she stated.

Currently production, excluding pigskins, is 70% furniture, 20% automotive, and the rest is sold as shoe leather to the good companies in Chengdu such as Kamiedo, Aiminer etc. As for the future, "Well, we will follow the rising demand," concluded He Xiao Lan.



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Western-style enterprises through joint ventures and other collaborations with international partners. One example is Shanghai Richina Leather which benefited from the technology and expertise of its New Zealand parent company in the 1990s and is today a major supplier of leathers for many applications including automotive, furniture and footwear. Pou Chen, from Taiwan, a recipient of USA leather technology, is another tanner which, via Prime Asia, now has a high volume leather production capacity in China.

The right chemistry

Perhaps the most significant sector to benefit from this technology transfer is the leather chemicals industry. Stahl was one of the first Western companies to set up manufacturing facilities in Asia, specifically Singapore, in the early 1980s. Stahl now has its own Chinese manufacturing facility in Suzhou under the name Stahl Coatings and Fine Chemicals (Suzhou) Co. Ltd. An early major development for China's leather chemical sector was the start of leather dye and chemical manufacture at BASF's Colorants and Chemicals plant

(BACC) in Shanghai which was established in 1966. Initially BASF had a joint venture with the Shanghai Dyestuff Corporation (SDC) but in 2000 BASF bought out SDC's share.

Lanxess has been manufacturing leather chemicals in China since 1998, originally through a joint venture with the Wuxi Dyestuff Factory. The operation has now evolved into the Lanxess Wuxi Chemicals Co. TFL has long been established in China. It initially formed its Chinese joint venture QTFL in early 1996 and subsequently a legal business entity was created in 2001. Late last year TFL inaugurated its new Application Centre China in Tongxiang City.

In December 2005 Clariant opened its new Technical Service Centre. This comprises an automotive centre, textile technical centre and leather testing laboratory. Customers receive comprehensive technical consulting as well as intensive support on all application questions. Trumpler has its subsidiary Trumpler Chemicals and Dyes (Jiaxing) Co. Ltd (TCD), located between Shanghai and Haining, where it produces beamhouse chemicals, fatliquors, syntans and dyestuffs. This new Trumpler facility, which features a 3000m² production area, can manufacture both powder and liquid products.

Testing times

The picture of shoe and leather technology transfer to China is completed by some of the global industry's most important research and testing organisations becoming far more closely involved in operations in China. SATRA Technology Centre has established an office in Dongguan City and is actively recruiting new members, using seminars on technical, ethical and business topics as a means of relaying its message to the industry. BLC Leather Technology Centre, working in partnership with Fang Yuang Testing Centre, opened a leather testing facility last May while CTC Groupe, of France, has reinforced its presence in south east Asia by opening a third subsidiary in Chengdu adding to existing facilities in Shanghai and Hong Kong.

The result of this concentration of international shoe and leather expertise in China, which started with shoe manufacturers simply looking for a cheap offshore manufacturing base, has been to help consolidate the country's dominant position in shoe and leather production around the world as well as the top footwear exporter. Statistics show that

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Wednesday, June 20
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Thursday, June 21
*Heidemann Lecture,
John Arthur Wilson Memorial Lecture
Technical Sessions, Visual Displays, Fun Run*

Friday, June 22
*Technical Sessions, Visual Displays,
Golf Tournament, Explore Washington*

Saturday, June 23
*Technical Sessions, Sports/Social Activities Luncheon,
Reception, Banquet, Closing Ceremony*

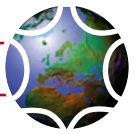
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imports and exports of China's leather sector continue to grow, indicating that there is still more potential for growth to be realised. None of this contribution in technology and expertise from international suppliers should in any way detract from China's own efforts to develop its own home grown industry and its own products. For example, in 2004 the China Leather Industry Association (CLIA) celebrated the tenth anniversary of launching its Genuine Leather Mark initiative which was an original attempt to protect consumers and help to develop quality footwear manufacture. CLIA is also actively promoting Chinese footwear brands. Names such as Senda, Kangnai, Belle, Aokang, Harson and Forlinda are not currently known widely in the Western world but they could become more familiar if the right image and fashion notes are struck. Aokang was recently named top leather shoe brand by the China Brand Research Institute (CBRI), based on the brand's sales volume, profit, export volume, investment in research and development and expenditure on advertising in the last two years.

China's leather industry has now completed its tenth 'five-year plan' and its long-term programme aims to readjust and optimise the leather industry structures so as to launch the quantity-oriented leather industry into its second phase of development (1998-2015), that features quality, variety, and higher unit prices at export. Essentially China plans to improve quality and increase added value to its products. Having seen an annual increase of 5% for the output of main leather products, and 7% in sales revenues and the amount of foreign exchange earned respectively, the 2005-2015 plan envisages an annual increase of 3% for the output of main leather products, and 5% for sales revenues. The target now is not so much growth as high revenue return.

The plan also involves establishing three to five world famous Chinese brands by 2015 and this may well happen earlier as some sports companies such as Li-Ning prepare for the Olympics in Beijing.

A step in the right direction

There are three major footwear-producing provinces, Guangdong at around 3.2 billion pairs, Fujian at about 1.4 billion and Zhejiang at a little over a billion. All are coastal areas with well-developed infrastructures and logistic capabilities. Dongguan in Guangdong, as indicated, is huge and produces more than the total output of Europe's largest

producer Italy. Sichuan Province, including Chengdu, in the south-west of the country is also growing rapidly and, with an annual output of over half a billion pairs, has become the fourth largest. However, due to its distance from ports, to date it has concentrated primarily on the domestic market and exports to Russia.

The success of these coastal regions may lead to their undoing, as there is an increasingly upward pressure on wages due to competition for labour by more attractive industries. Whether companies could successfully relocate yet again—this

time to more remote regions—is a key question. They might well be able to do so and supply the domestic market, although exports might prove more difficult.

The vast majority of the footwear industry is privately-owned with only 3% still retaining any degree of state involvement. A further 7% is collectively-owned and the remaining 90% is split evenly between foreign and locally-owned enterprises. Foreign ownership mostly consists of Taiwanese, Korean and Hong Kong Chinese investment, but the picture is changing even here as local Chinese ➤

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Chengdu: a well-kept secret

Chengdu in south west China is increasingly important for China's leather industry. A city with over 10 million inhabitants it has long had a strong textile and leather business. With more than a dozen highly-respected advanced institutions of learning, including two universities founded in 1896, it is not surprising that both Intel and Microsoft have invested there; and of course it is a major centre for Lenovo which recently purchased IBM computers. Yet, in 2004 it was thought to have only about 200 long-term foreign residents. This is certainly set to change.

The Wuhou District of Chengdu has now become a major base for the making of ladies' footwear. It is said that the district produces one third of the ladies' shoes produced in the country, with an annual production value of RMB5 billion (\$625 million). Over 80% of the shoes manufactured in Sichuan Province are made at Wuhou District's 'Western China Shoe Production Industry Zone', and of these 90% of shoes are ladies' shoes.

The West China Shoe centre (WCS), in south Chengdu, is a corporation whose main interests are in industrial real estate and trading in shoes. It does not have its own manufacturing plants, but acts as an intermediary between buyers and sellers. It is also able to offer advice, training and commercial know-how to the smaller of the factories. Peter Mangione, president of the Footwear Distributors and Retailers of America, was recently invited to Chengdu by the WCS in order to 'familiarise himself with the local industry'. During his stay, Mangione gave a speech at the Sichuan University, which attracted an audience of over 200, most of whom were from the top echelon of the local footwear trade. The topic of his speech was "Dealing with America". In a parting note he said, "Chengdu is a well-kept secret and I look forward to working with the WCS to carry the message of opportunities here to the USA and beyond."

La Why La Why!

In the Mandarin language, this term means foreigner and is sometimes shouted at you in a good-humoured way by cheeky school kids. Certainly, there are not many foreigners in Chengdu compared with the high profile cities of Shanghai and Beijing. Trade visitors are numerous, but increasingly the town is beginning to see more industry specialists. Paolo Coscone, an Italian from Venice, is a freelance shoe designer whose skills in leather, were handed down by his father and grandfather. He came to China, three years ago, to establish a representative office of the Italian company. Working with a few Chinese staff he now has a thriving business.

His time is mainly spent on designing summer and winter collections, and visiting trade fairs around the world. He attends at least one major shoe fair a month and comments, "Chengdu is far away and one must constantly keep up to date."

He told *World Leather* that whilst the Russian and Chinese buyers want shoes with lots of glitz and adornments, there is now a trend for more simple, but sophisticated footwear. Chinese white-collar workers, with disposable income, want better shoes or boots, and they now follow Western styles.

When asked about the quality of the local hides and skins he says, "The Chinese product is acceptable, but not as good as leather from Italy or Spain," adding that when purchasing in China it is important to be on-site as quality control is paramount. However, trying to arrange meetings with Chinese shoe manufacturers in Chengdu is not always easy. Such are the sensitivities of the trade, local manufacturers sometimes refuse to be interviewed and photography is frowned upon or denied.

businesses with relatively young managers are beginning to increase their entrepreneurial skills. The original Taiwanese owners, on the other hand, are seeking retirement and the next generation often does not want to live in China. In spite of this situation, many of the thrusting young Chinese businessmen still lack the advanced management skills necessary to maintain the pace.

Paying the price of success

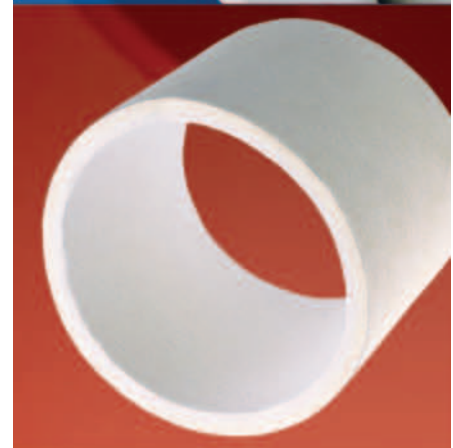
China's low wage structure is perfect for

a labour intensive industry such as shoe-making, but, as the early industrial areas have attracted more sophisticated industries with higher wage levels, it has become necessary to attract labour from poorer areas of the country. Such people work initially on two- to three-year contracts and live in subsidised dormitory accommodation. It has been estimated that out of approximately 90 million workers in Guangdong's footwear industry, some 28% are migrants.

Working hours are longer in China ►

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than in most other countries, with a 60 hour-week often the norm. This is despite a government ruling of no more than 52 hours without special permission. The fact that many employees left home in the first place in a search for money makes them easy to exploit. Many international brands have responded to pressure concerning this issue and now stipulate better terms of employment by their subcontractors and so appear more socially responsible. While labour turnover only appears to be about 20% per annum, many leave to work in better-paid industries in order to be able to marry and settle down. Indeed, the concept of a migrant national workforce now appears to be a fact and one that will ultimately reduce wage differentials across the country and so add more pressure on shoe-making costs.

Furthermore, there are several hundred thousand job vacancies unfilled. In Guangdong alone it is said to approach 150,000. This has led to employers competing on wages and fringe benefits in order to maintain output. In addition, codes of practice introduced by many

international brands to improve conditions in supplier factories have reduced working hours. This has reduced output per employee for many companies and so increased their costs.

These pressures on labour availability and cost are likely to have a far-reaching effect on China's footwear industry in terms of where it will ultimately be centred and its overall competitiveness. The working week is currently six days of 10 hours each. Additional hours worked to meet tight deadlines normally attract overtime payments. Holidays are three seven-day breaks per year. The pressure for change by employees will continue and the industry will no longer have an endless source of cheap, compliant labour. It will then find itself on a more level footing with other 'lower cost' countries.

Keeping up with the neighbours

Labour costs should, in theory, be relatively similar from company to company but, as we have already seen, many pay considerably over the agreed regional rate in order to attract and retain

skilled workers. As an example, in April 2005 the official footwear industry wage in Guangdong Province was raised by 28%, but it would appear that in reality many companies increased their wages by up to 35% and, surprisingly, it was often the smaller ones that did so.

A major weakness of some parts of China's footwear industry is the lack of an effective costing structure. Costing systems do not even exist in many factories and, in those where it does, it is usually primitive by Western standards. Typically, the material cost is calculated, to which is then added a fixed sum for labour, overheads and profit. The fixed sum will vary according to the quality of the company and the service it provides.

American customers, for instance, tend to order very large volumes per design. Europeans go for much smaller quantities. The factory sets its prices on the basis of the likely number of designs its particular type of customer normally orders. So a company having an extensive design capability could charge \$5 per pair for labour, overheads and profit, whereas one with minimal capability might be only half that level. Similarly, a company that is able to accommodate small orders for a large number of designs will charge more, while one with a more basic organisation will charge less. No serious thought is given to the relative complexity of a given design, so unless the style balance is 50/50, cost recovery will reflect the actual throughput.

A learning curve

Most sizeable Chinese companies have large product development sections and staff with reasonable shoe engineering skills. Many have some form of CAD system. They have also received considerable assistance from foreign customer brands with in-depth technical knowledge. As a result, factories are able to develop new models quickly and in large numbers.

As far as training is concerned, there are upwards of 20 footwear training facilities in China, which offer a bachelor degree in footwear engineering for around 2,000 students per year. Some attempt is also being made to train designers, an inherently weak area in the industry. The leather sector offers many courses of variable quality and the University of Northampton in the UK expects to have three partnerships fully established before the end of 2006. The University of Chengdu is generally accepted as the leading establishment at the moment.

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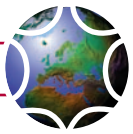
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Produced to scale

To say that China's shoe factories are large is something of an understatement. The biggest manufacturing group is reported to have at least 90,000 employees.

Factories producing 400,000 to 500,000 pairs per year are considered small. Medium is two to three million pairs, while a large factory will make over four to five million pairs per year. Many large factories are subdivided into sections that make for one major brand customer exclusively.

Asia has traditionally been known for producing large numbers of a relatively few designs on long lead times. This has changed, certainly as far as China is concerned. Now, it often takes no more than two weeks for a major producer to develop a range, a further six to despatch and then three to four weeks by container to either Europe or America's western ports. Smaller factories are able to ship smaller volumes in anything down to 45 days and airfreight is increasingly used as product value rises. Local tanners are given lead times of less than 25 days and often

deliver ex-stock on a pre-planned basis. Many of the major shoe companies now even own their own tanneries.

Footwear imports & exports (million pairs)

	2003	2004	% variance
Production	7,800*	8,800*	12.8
Imports	8.4	10	19.0
Exports	5026	5885	17.1
Consumption	2782	2925	5.1

*estimate

Source: SATRA

So what does the future hold for China's dynamic leather and footwear industries? The best thing is to look first at its inherent advantages. It is now capable of producing high quality footwear and leather goods and can produce in small volumes. It can develop new products very quickly and also deliver repeat orders in less than 45 days. It has a large pool of labour and a huge potential domestic market.

And, what are the downsides? The most obvious, at least as far as exporters are

concerned, is the rate at which wages are rising in the developed areas in which the footwear industry is currently located. At the same time of course, an increasing standard of living will enhance the domestic market, so it cuts both ways. More and more manufacturers are therefore likely to turn to the latter to replace the former.

The biggest problem, however, is poor productivity resulting from a lack of management and supervisory skills. Unless companies can improve efficiency by investing in more sophisticated and higher output machinery, and train their employees to exploit them to the full, they will lose their traditional competitive edge and buyers will begin to look elsewhere. India has seen this danger and footwear companies there are equipping themselves with the very latest technology. Simply moving to cheaper labour areas is negative thinking and this is a mindset that the Chinese industry has to shed if it is truly build on the phenomenal start it has enjoyed over the past 20 years.



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