

## PERSONAL PROTECTIVE EQUIPMENT

## The EU market for protective footwear

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**Report summary**

This CBI market survey discusses the following highlights for the EU market for protective footwear:

- In 2007, industrial demand for protective footwear amounted to € 1,724 million in the EU. The market size grew 2.1% annually during 2003-2007. Growth at a level of about 2.8% per year is expected for the period 2007-2009. In terms of volume, the market can be estimated at about 67 million pairs in 2007, at an average price per pair of € 25.75.
- EU production of protective footwear decreased in volume (-4.2% to 31.6 million pairs) and grew in value (+1.6% to € 717.4 million) in the period 2003-2007. Italy remained by far the leading producer of this product group, despite decreasing production.
- The EU imported 60.6 million pairs of protective footwear in 2007, valued at € 873 million. Imports in volume increased 23% in 2007 compared to 2005 and in terms of value by 26%. Four major EU countries (UK, France, Germany and Italy) accounted for 60% of total EU imports (in terms of value).
- The role of DCs in EU imports of protective footwear became more important: its share in imported value increased from 34% in 2003 to 45% in 2007. Leading exporters in DCs were China (23% of total imported value by the EU), Tunisia (14%) and India (4%).
- The most important suppliers on the protective footwear market in EU countries are: (specialised) importers, footwear manufacturing companies, PPE distributors or wholesalers offering a PPE assortment including footwear from other sources. This can be branded products of major manufacturers and/or private labels sourced from contract manufacturers.

This survey aims to provide developing-country exporters of protective footwear with product-specific market information related to gaining access to the EU market(s). By focusing on the EU market(s) for one product(group), this document provides additional in-depth information, complementary to the more general information and data provided in the CBI market survey 'The personal protective equipment market in the EU', which can be downloaded from <http://www.cbi.eu/marketinfo>.

Footwear for working circumstances can be divided into safety footwear, protective footwear and occupational footwear. Official statistics in production and trade are available for safety and protective footwear (both product groups include toecaps) but not for occupational footwear. It should be noted that in this survey the term protective footwear will be used for safety and protective footwear, unless another classification is necessary. Detailed information on the selected products is given in appendix A.

This survey discusses the EU in general and the following major markets in particular: United Kingdom, France, Germany, Italy, Spain and The Netherlands.

**1 Market description: industrial demand and production****Industrial demand**

Table 1.1 shows the size of the EU market for protective footwear during the period 2003-2007 and forecasts for 2009. The annual growth rate for EU countries can be estimated at 2.6% over the period 2005-2009.

The EU protective footwear market accounted for about 67 million pairs in 2007, at an average price per pair of € 25.75. The market size grew from a figure of about € 1.591 million in 2003 to € 1,724 million in 2007.

**Table 1.1 Expenditure on protective footwear in the EU, 2003-2009, in € million**

	2003	2005	2007	Annual change in %, 2003-2007	2009 forecasts
Germany	335	340	351	+1.2%	370
United Kingdom	265	280	293	+2.6%	310
France	270	279	290	+1.9%	310
Italy	207	212	217	+1.2%	230
Spain	124	131	140	+3.2%	150
The Netherlands	48	49	51	+1.6%	55
Belgium	42	45	47	+3.0%	50
Other EU countries (20)	300	311	335	+2.9%	345
<b>EU</b>	<b>1,591</b>	<b>1,647</b>	<b>1,724</b>	<b>+2.1%</b>	<b>1,820</b>

Sources: derived from Eurostat (2008) and trade estimates

Further, stronger growth is expected at a level of about 2.8% per year and, on this basis, the estimated market size for 2008 is € 1,820 million. This increase is the result of:

- Slight increase in volume against higher prices, caused by technical innovations;
- The twelve new EU countries have to adhere to stringent EU legislation on health and safety. This factor is expected to promote increased demand for protective footwear (and other PPE items). The demand in the new EU member states is set to grow at a forecast compound annual growth rate of 4-6%, thereby outpacing the EU average.

As mentioned above, table 1.1 includes safety and protective footwear conforming to the EU Directives and does not include occupational footwear. The market for occupational footwear has been estimated by branch experts at 72 million units valued € 1,570 million in 2007.

Requirements by end-users, are besides technical aspects, the materials used and production techniques, often based on improvement of wearer comfort.

Production techniques for protective footwear can be divided into:

- PU (polyurethane); a direct injection method including single and dual density. This popular type of footwear has, in practice, an average life of 3-6 months for single density and 6-8 months for dual density. Advantages are light-weight, flexibility (even with metal toe-cap and/or metal sole) and cheap but less wear-resistant.
- Goodyear welted; advantages of this production technique are a better technical quality, resulting in a mean life of 30 months, but heavier and more expensive.
- Other techniques, such as vulcanized (mainly used for the lower end of the market) and stuck or cemented.

### ***Segments for protective footwear***

Below, we give a short description of protective shoes and/or boots used for the several working sectors. Since this is a general summary, it is important to realize that each job may require additional protection. For example, features such as slip-resistant soles will vary, depending upon the particular type of slip hazard each job can entail.

In most cases, a website of one specialized EU manufacturer is mentioned for finding more specific information. According to the classification by end users, as described in the CBI market survey 'The personal protective equipment market in the EU', the following applications can be distinguished:

#### *Agriculture etc.*

Besides agriculture this sector also includes horticulture, forestry and fishing. Protective boots, shoes and clogs have to cope with the many different hazards encountered in agriculture: resistance to mechanical damage (crushing, abrasion and cuts) also to chemical attack by such different substances as animal fats, manure, fertilizers and fuels; a specially treated sole should have a high level of adhesion on wet, slippery, greasy and steeply sloping floors and surfaces.

Forestry work requires the use of boots lined with a fabric (such as Kevlar) capable of rapidly interrupting power to the chain saw when exposed by a cut.

Some interesting websites of suppliers, operating in this sector (among many others) in the EU are: <http://www.heckel-securite.com>, <http://www.uvex-safety.de> and <http://www.etchesecurite.com>.

#### *Industry*

- Food industry  
Protective boots need to be resistant to animal and vegetable fats, cleaning products and disinfectants as well as remarkable resistance to mechanical damage (abrasion and cuts). Their sole should have a high level of adhesion on wet, slippery, greasy and steeply sloping floors and surfaces.  
They should also be protective in different climates, for example in freezer halls or in bakeries. An example can be found on: <http://www.heckel-securite.com> and <http://www.pezzol.it>.
- Manufacturing  
The type of safety and protective boots and overshoes for the manufacturing sector depends on the sector. Mainly they should be water-resistant, protect against chemicals and they need a special sole for anti-slip and absorbing shocks. They should ensure a high level of adhesion on wet, slippery, greasy and steeply sloping floors and surfaces. More information can be found on: <http://www.tacconi-spa.it> and <http://www.heckel-securite.com>
- Electricity, gas and water supply  
Protective boots for high-tension work need to be fully moulded, because this totally eliminates the risk of the sole becoming detached from the upper. For example: boots should be resistant at 13.000 V for a period of 1 minute. Special soles should have a high level of adhesion and provide enhanced comfort for ladder work. Product and other information can be found on: <http://www.etchesecurite.com>
- Construction  
Protective boots and shoes for the construction sector also have to cope with many hazards. Requirements are: totally impermeable; resistance to casting oils, fuels and concrete; no loss of resistance over time; water resistance and protection against chemicals.  
They need a special sole for anti-slip and absorbing shocks and must ensure a high level of adhesion on wet, slippery, greasy and steeply sloping floors and surfaces. Several product descriptions can be found on: <http://www.asatex.eu>.
- Mining & quarrying  
Protective boots need to be antistatic and able to cope with the many different serious hazards encountered in this high-risk sector. For example: boots are used on all types of floors and surfaces: greasy, slippery, steeply sloping, etc. and should also be resistant to fuels, oils, abrasion, cuts and perforation. See (among others): <http://www.heckel-securite.com>

#### *Market and public services*

- Wholesale and retail  
Standard shoes in this sector need comfortable properties and are worn under uniforms or other workwear. Requirements depend on working circumstances, in many cases the retail sector chooses for lightweight and smooth sole. Some additional characteristics can be breathable, anti-fatigue and other more comfort aspects. Examples can be found on: <http://www.jallatte.com>
- Hotels and restaurants  
Protective footwear varies for specific functions or working circumstances. Special slip and oil resistant rubber outer soles are required for harsh working conditions, mainly in kitchen. In some cases special (kitchen: falling knives) toe protection is required. Shoes in other functions have to be representative and more attention to styling is necessary. More on: <http://www.allheartchefs.com/kitchenshoes.html>.
- Health care  
Protective shoes in this sector protect feet from common hazards, such as falling or rolling objects, cuts and punctures. Footwear for health care should also be highly water-

resistant, breathable and durable, are mainly in white colour and easy to wipe clean. Shoes for this sector also need to insulate against temperature extremes and may be equipped with special soles to guard against slip, chemical, and/or electrical hazards. More on: <http://www.euro-dan.dk>

- Transport and communications  
Special work shoes for the transportation sector need to have a smooth sole for driving and reduce risk of sprains. Also they should be lightweight and have a special sole, including shock-absorbent properties. Product description can be found on: <http://www.uvex-safety.de>.
- Business activities  
Standard shoes in this sector need comfortable properties and are mainly worn under uniforms. No specific protective requirements are required. More on: <http://www.jallatte.com>
- Police  
Protective footwear for police has to cope with the many different hazards, depending on the level and region. Footwear made for the police should be comfortable to wear and made of waterproof leather. Some requirements are: reduce risk of sprains; lightweight and soles including shock-absorbent properties, anti-static and slip-resistant.
- Fire brigades  
Fire brigade boots are protective boots and should be resistant to heat, heat flows and flames, protection against weak and diluted acids. Their sole should have a high level of adhesion on wet, slippery, greasy and steeply sloping floors and surfaces. Fire protection boots come in many options: marker bands, leather straps, customisation, etc. See: <http://www.ew-schuh.de> and <http://www.koeninger.de>.
- Armed forces  
Protective boots and shoes have to cope with the many different hazards depending on the level and region, in this sector, too. The entire toe box and insole are reinforced with steel and the instep is protected by steel, aluminium or PU materials. Protective boots made for military purposes need to be 8 to 10 inches in height and made of waterproof leather. The sole needs to be shock absorbing, anti-static and slip resistant.

### **Market developments**

Developments in EU market for protective footwear:

- Manufacturers and designers have made considerable efforts in recent years to introduce a degree of style as well functionality to protective footwear and this trend will be continued;
- The usage level of protective footwear, ever since the introduction of legislation requiring its use, was higher in Scandinavian countries and West European countries, like Germany, United Kingdom and The Netherlands;
- Growing expenditure is expected on the short term for South European countries, like Spain and Italy and, in the long term, for East European countries, such as Poland, Czech Republic and Hungary;
- Annual growth of the EU market for protective footwear for the period 2007-2009 can be estimated at 2.8%;
- Total workforce will stabilise, while the number of female employees as well as part-time employees will increase. Workforce in several sectors will increase, especially in the health and care sector (ageing population);
- Increasing spending on fire fighting, catastrophe control and emergency services (terrorism).

### **Production**

Production of protective footwear in the EU decreased in volume (-1.3%) and in value (-1.0%) during the period 2005-2007. Italy remained by far the leading producer of this product group, despite decreasing production. There was an annual average fall in the EU of 5.2% (in terms of volume) during the period under review. In table 1.2, the major protective footwear producing countries are mentioned, while The Netherlands and Belgium are classified under 'Other EU countries' because production in these countries is very limited.

**Table 1.2 EU production of protective footwear, 2003-2007, in volume and value**

	2003		2005		2007 (forecasts)	
	million units	€ million	million units	€ million	million units	€ million
Italy	12.3	202.8	11.6	190.6	11.2	188.2
Germany	4.0	153.3	3.7	151.7	3.7	156.5
France	6.0	135.9	6.1	146.8	5.4	128.8
Finland	0.5	25.7	1.0	45.7	1.1	54.1
Spain	3.0	49.5	2.6	47.3	2.2	37.8
Portugal	0.9	20.2	1.3	25.5	1.0	23.0
Poland	0.5	5.7	0.7	9.4	1.1	14.6
Romania	0.8	3.1	0.9	3.7	1.4	8.6
Denmark	0.2	9.6	0.2	8.0	0.2	8.1
Hungary	0.2	5.1	0.2	5.1	0.2	4.4
Other EU countries	4.6	95.5	3.7	90.6	4.0	93.3
<b>Total EU</b>	<b>33.0</b>	<b>706.4</b>	<b>32.0</b>	<b>724.4</b>	<b>31.6</b>	<b>717.4</b>

Source: Eurostat (2008)

EU manufacturers of protective footwear are mainly footwear specialists, but some manufacture takes place by other companies in the PPE manufacture sector.

Protective footwear manufacture is carried out in nearly all major countries and is regarded as a highly competitive market. The majority of manufacturers do not rely solely on their own domestic market for generation of company revenues. They seek to take part in export trade. Many major EU protective footwear manufacturers:

- are represented commercially in several countries by established distributors;
- have established their own selling companies in other European countries. This does not necessarily imply that they attempt to sell mainly directly to end-users, but that they act as local sales points mainly for sales to distributors in the country;
- have established manufacturing facilities in other countries;
- import protective footwear from outside the EU, although these imports are not always fully finished footwear. Sometimes partly made goods are imported for assembling in the EU;
- a number of the larger manufacturers has established technology deals with non-European companies.

Important players on the EU market are: Bata Industrials - <http://www.bataindustrials.com> - a division of the world's largest manufacturer and marketer of footwear, the Bata Shoe organisation. Bata Industrials Europe has its headquarters in The Netherlands. Activities outside the (industrial) footwear sector include hosiery and workwear/protective clothing. Other leading protective footwear companies in the EU are in:

**Italy:** Tacconi SpA (<http://www.tacconi-spa.it>); Rontani SpA (<http://www.rontani.it>); Giasco (<http://www.giasco.com>) and Pezzol SrL (<http://www.pezzol.it>)

**Germany:** Köninger Arbeitsschutz GmbH (<http://www.koeninger.de>); Profas GmbH, part of Uvex (<http://www.profas.com>); Uvex (<http://www.uvex-safety.de>); Asatex AG (<http://www.asatex.de>) and Abeba GmbH (<http://www.abeba.de>)

**France:** JAL Groupe (<http://www.jallatte.com>), which includes Jalatte, Lupos, Aimont and Almar. Sperian (<http://www.sperianprotection.com>); Delta Plus (<http://www.deltaplus.eu>); MB Protection (<http://www.mb-protection.fr>); Lemaître Sécurité (<http://www.lemaitre-securite.com>) and Mardon (<http://www.mardon.fr>).

**United Kingdom:** Phoenix Safety (<http://www.phoenixsafety.com>) and the leading UK manufacturer Totectors (<http://www.totectors.co.uk>), which expanded its assortment with other PPE products, just like Goliath and Tuf Work and Safety Wear.

**Spain:** Security Line (<http://www.securityline.es>); P'Aqua (<http://www.panter.es>); Robusta SL (<http://www.robusta.es>)

**The Netherlands:** Bata Industrials (<http://www.bataindustrials.com>) is a division of a global manufacturer and marketer of footwear, the Bata Shoe organisation. Bata Industrials Europe has its headquarters in The Netherlands. Activities outside the (industrial) footwear sector include hosiery and protective clothing. Other specialised producers of protective footwear are among others, besides Bata Industrials, Hevea and Emma (<http://www.emma-schoenen.nl>). Hevea produces waterproof outdoor footwear and rubber boots under the brand names Dunlop and Viking.

### Opportunities and threats

It should be noted that for many statements classified under Opportunities and Threats, it is a case of: an opportunity if you can respond, but a threat if you can't!

#### Opportunities

- Germany is still the greatest market for PPE, followed by France and United Kingdom. Per capita expenditure is high in Germany, France, the Scandinavian countries and the UK. The highest growth rates are expected in 'new' EU countries (like Poland, the Czech Rep., Slovakia and Hungary).
- Increasing awareness by corporations of the need to protect employees combined with the upgrading of the level of protection provided by footwear. Cheaper footwear is being replaced with better quality materials.
- Developments on the protective footwear market are the increasing number of product innovations or modifications, mainly based on advantages for end-users or economic advantages for the purchasing organisations. Examples are: the metal toe cap in safety footwear will be replaced by non-metallic or composite toe caps. These products will provide the same safety advantages as their metal ancestors, but with the added bonus of lighter weight and anti-magnetism.
- Casual fashion influences are valid for safety footwear. On the other hand, employees in the office are dressing more conventionally and pay more attention to their outfit. New developments make safety shoes for the office more comfortable and light weighted and they are looking more elegant and representative than before.
- Though current regulations now ensure high safety standards, their provisions are still comparatively low in respect to water-tightness and weather comfort. Improvements have been made in the comfort level of work shoes: shoes that guarantee dry feet even for those who regularly have to go from working in- to outdoors, like security personnel and delivery men.
- Increasing spending on fire fighting, catastrophe control and emergency services (terrorism).
- In order to establish a serious relationship with a leading importer in the EU, the exporting manufacturer must be very quality-conscious, always punctual in deliveries and honest and straightforward in communications.

#### Threats

- Strong competition on the protective footwear market in the EU makes it difficult for small producers in DCs to gain entry to the market by offering 'more of the same', which implies very strong price competition.
- The shift of production facilities from EU countries to other areas.
- Increasing competition caused by imports of cheap products.
- Product innovations or modifications require investments.

#### Useful sources

- A lot of information is given by the leading European manufacturers, as mentioned above. These sites give extended descriptions of a very broad range of protective footwear, including technical as well as commercial information.

- Participants (including products and addresses) of the leading trade fair A+A (Occupational Safety and Health at Work) in Düsseldorf, Germany can be found on website <http://www.aplusa-online.de>.
- The website of the European Safety Federation (ESF) is: <http://www.european-safety-federation.org> and includes links to national organisations.
- Addresses of standards organisations, Notified Bodies, just like addresses of other trade fair organisers, trade magazines and other useful addresses can be found in the CBI market survey 'The personal protective equipment market in the EU' and the link plaza on CBI's website <http://www.cbi.eu>.

## 2 Trade channels for market entry

### Trade channels

The most important suppliers on the protective footwear market in EU countries are:

- independent national manufacturing companies often specialised in one specific product group operating on the domestic market and eventually in combination with exporting;
- manufacturers complement their range by offering goods from other sources, including imports;
- manufacturing operations by international companies with headquarters in Europe or outside Europe (USA, Canada etc.);
- manufacturing companies from abroad with manufacturing and/or commercial interests in a specific EU country;
- national PPE distributors or wholesalers offering a PPE assortment including footwear from other sources. This can be branded products of major manufacturers and/or private labels sourced from contract manufacturers;
- importers; these companies import large volumes of one specific product group (mostly from the Far East) and usually sell to other resellers, rather than direct to end users.

The structure of the PPE business is a complicated one. Most of the manufacturers have their own specialisation in the categories mentioned. In general, manufacturers do not undertake direct selling operations to end-users, except for the largest international companies which often operate on the basis of contracts concerning large quantities. Many (larger groups) companies, however, have extended their assortment through the acquisition of specialists in other products or they purchase products to complement their own assortment. The PPE market can be characterised further as a wide network of distributors on several regional levels per country. In general, distributors may also deal in imported goods.

Companies in low-labour costs countries and national distributors are increasingly threatening the European based companies. Distributors are sourcing own label products from foreign contract manufacturers and selling them at lower cost than the traditional branded products. Often these products are simply copies of innovative branded products launched previously. More detailed information about distribution of PPE (including protective footwear), just like names and websites of important PPE importers and/or distributors, can be found in the CBI market survey 'The personal protective equipment market in the EU'.

The best advice to exporters in DCs is to look for any form of co-operation. Some European manufacturers have undertaken joint venture activities with foreign companies, to achieve the combined advantage of cheaper supply sources and quality controlled manufacture. Another possibility is to produce private-label footwear for European importers or distributors. Many imports are still simply purchased on the spot by importers, such as the distribution companies.

### Price structure

Due to the diversity in products, it is difficult to focus on prices for individual products. These prices are influenced by many factors, such as materials used, quality level, requirements in CE marking, type of distributor, market level often combined with brand name and volume of

purchasing. All these factors lead to big differences in prices. For that reason, prices for protective footwear will not be included.

Sources of price information are given in chapter 5 of the CBI market survey 'The personal protective equipment market in the EU'.

**Table 2.1 Possible margins in trade of protective footwear**

CFR Rotterdam/Amsterdam	100
Import duties	*
Handling charges: transport/insurance, banking services	6
Final charges: warehouse fee and interest on investment	3
	109
Importer's margin	60
Net selling price	169
<b>RATIO CFR/CONSUMER PRICE:</b>	<b>1.7</b>

\*) import tariffs vary from 0.0 up to 17.0% of CFR value

### Selecting a suitable trading partner

Interesting distribution channels for exporters in DCs are: importers, distributors or wholesalers and manufacturers, who want to expand their assortment. Several websites of manufacturers have been given in the previous chapter and more information on importing wholesalers and distributors is given in this chapter.

First contacts with potential trading partners can be made by direct mail, for which contact details can be found in this survey, in business directories, CBI, trade promotion offices and search engines on Internet, list of exhibitors at trade fairs, specialised trade magazines etc. A detailed explanation of this has been given in CBI's export manuals.

A good place to make contacts is PPE trade fairs, such as the German A+A, Occupational Safety and Health Trade Fair, by far the leading trade fair in the EU. Please refer to <http://www.aplusa-online.de>.

Other major PPE trade fairs in the EU are:

Country	Trade fair	Website
Germany	Arbeitsschutz Aktuell	<a href="http://www.hinte-messe.de">http://www.hinte-messe.de</a>
Finland	Turvallisuus	<a href="http://www.tampereenmessut.fi">http://www.tampereenmessut.fi</a>
France	Expoprotection/Fire Exhibition	<a href="http://www.expos-protection.com">http://www.expos-protection.com</a>
France	Preventica	<a href="http://www.preventica.com">http://www.preventica.com</a>
Spain	Laboralia	<a href="http://laboralia.feriavalencia.com">http://laboralia.feriavalencia.com</a>
Spain	Sicur	<a href="http://www.sicur.ifema.es">http://www.sicur.ifema.es</a>
UK	Safety and Health Expo	<a href="http://www.safety-health-expo.co.uk">http://www.safety-health-expo.co.uk</a>
UK	International Fire Expo	<a href="http://www.fire-expo.co.uk">http://www.fire-expo.co.uk</a>
Sweden	Skydd. Protection & Security Expo	<a href="http://www.skydd.net">http://www.skydd.net</a>
Poland	Sawo	<a href="http://sawo.mtp.pl">http://sawo.mtp.pl</a>
Czech Rep.	Interprotec	<a href="http://www.bvv.cz/interprotec-gb">http://www.bvv.cz/interprotec-gb</a>

The lists of exhibitors at these trade fairs are often mentioned on their websites.

The decision of an exporter, as to which market entry strategy can be chosen, depends on many internal (own manufacturing and organisational capabilities etc.) and external (direct or indirect exporting and in the latter case which intermediaries are the most suitable) factors.

## 3 Trade: imports and exports

### Imports

The EU imported 60.6 million pairs of protective footwear in 2007, valued at € 873 million. Imports in 2007 compared to 2005 increased 23% in volume and 26% in value, which indicates 2.4% higher import prices in 2007.

EU imports of protective footwear came for 54% (in terms of value) from other EU countries in 2007, this share having been 58% in 2003. The role of DCs in EU imports of protective

footwear became more important. Their share increased from 34% in 2003 to 45% in 2007. Leading exporters from DCs were China (23% of total imported value by the EU), Tunisia (14%) and India (4%). The role of DCs in imports of protective footwear to major EU countries varied strongly. The leading DC suppliers were Tunisia (for Italy and France) and China (for Germany, UK, Belgium, Spain and The Netherlands).

Four major EU countries (Italy, Germany, UK and France) accounted for 60% of total EU imports (in terms of value). Italy passed France, the UK and Germany in 2007 and became the leading importer of protective footwear in the EU, followed by Germany, the UK and France. Imports by the major EU countries grew considerably in the review period as a result of decreased domestic production, continued trend towards outsourcing of production and developments in exchange rates.

**Table 3.1 Imports and leading suppliers of protective footwear 2003–2007, share in % of value**

	2003 € mln	2005 € mln	2007 € mln	Leading suppliers in 2007 (share in %)	Share (%)
<b>Total EU-27</b>	<b>622</b>	<b>691</b>	<b>873</b>		<b>100</b>
Intra-EU:	360	377	474	Italy (20); Germany (7); France (7); Finland (4); Netherlands (3)	54
Extra-EU ex. DCs:	48	23	8	Hong Kong (<1%); Taiwan (<1); Australia (<1); USA (<1%)	1
DCs:	214	291	391	China (23); Tunisia (14); India (4); Albania (1); Croatia (1)	45
<b>Italy</b>	<b>105</b>	<b>91</b>	<b>138</b>		<b>100</b>
Intra-EU:	6	6	21	Romania (10); France (3); Germany (1); Spain (1); Netherlands (<1)	15
Extra-EU ex. DCs:	12	17	0	USA (<1); Hong Kong (<1)	0
DCs:	87	68	117	Tunisia (37); China (26); Albania (4); Serbia (3); India (1)	85
<b>Germany</b>	<b>123</b>	<b>124</b>	<b>138</b>		<b>100</b>
Intra-EU:	98	98	107	Italy (46); France (9); Portugal (6); Slovakia (4); Belgium (4)	78
Extra-EU ex. DCs:	16	1	0	Switzerland (<1)	0
DCs:	9	25	31	China (10); Croatia (4); India (3); Moldova (2); Tunisia (1)	22
<b>United Kingdom</b>	<b>112</b>	<b>128</b>	<b>127</b>		<b>100</b>
Intra-EU:	52	34	35	Italy (10); France (6); Germany (5); Netherlands (2); Portugal (2)	28
Extra-EU ex. DCs:	3	2	5	Hong Kong (2); Taiwan (1); Australia (<1); USA (<1); Norway (<1)	4
DCs:	57	92	87	China (50); Tunisia (12); India (5); Indonesia (<1); Turkey (<1)	68
<b>France</b>	<b>83</b>	<b>94</b>	<b>124</b>		<b>100</b>
Intra-EU:	42	37	53	Italy (17); Slovakia (9); Belgium (6); Netherlands (2); Germany (2)	43
Extra-EU ex. DCs:	8	0	0	Taiwan (<1)	0
DCs:	33	57	71	Tunisia (26); China (20); India (10); Serbia (1); Turkey (1)	57
<b>Belgium</b>	<b>39</b>	<b>41</b>	<b>53</b>		<b>100</b>
Intra-EU:	34	33	37	France (21); Italy (15); Germany (15); Netherlands (14); Sweden (1)	70
Extra-EU ex. DCs:	0	0	0	USA (<1)	0
DCs:	5	8	16	China (16); India (14); Brazil (<1); Tunisia (<1); Turkey (<1)	30
<b>Spain</b>	<b>26</b>	<b>41</b>	<b>51</b>		<b>100</b>
Intra-EU:	16	23	22	Italy (24); France (11); UK (4); Germany (2); Portugal (2)	43
Extra-EU ex. DCs:	0	0	0	Hong Kong (<1%); USA (<1%)	0
DCs:	10	18	29	China (36); Tunisia (19); Turkey (1); India (<1); Oman (<1); Guatemala	57

	2003 € mln	2005 € mln	2007 € mln	Leading suppliers in 2007 (share in %)	Share (%)
				(<1)	
<b>Netherlands</b>	<b>28</b>	<b>30</b>	<b>37</b>		<b>100</b>
Intra-EU:	19	19	23	Italy (22); Germany (18); Belgium (8); Portugal (6); France (5)	62
Extra-EU ex. DCs:	2	1	1	Canada (1); Taiwan (<1); Hong Kong (<1); USA (<1); Norway (<1)	3
DCs:	7	10	13	China (33); Indonesia (2); Vietnam (<1); Turkey (<1); Brazil (<1)	35

Source: Eurostat (2008)

Strongly growing imports in 2007 (> 10% and accounting for more than 150 thousand pairs), compared to the previous year, came from China (+30% in volume), Albania (+77%), Belgium (+27%), Spain (+20%), Hong Kong (+208%) and Poland (+60%). Guatemala and Macao became new suppliers however, their exports were very limited.

Footwear, including toe-cap, with uppers of leather, accounted for 91% in volume and 93% in value of total EU imports in 2007. Average import prices decreased in this major product category of protective footwear in the period 2003-2007: the EU import price in 2007 amounted to an average of € 14.52 per pair (in 2003: € 15.96 and in 2005: 14.33).

**Table 3.2 EU imports of protective footwear (including toe-cap) by type of product groups, 2003-2007**

	2003		2005		2007	
	'000 pairs	€ million	'000 pairs	€ million	'000 pairs	€ million
Waterproof footwear with:						
- uppers of rubber	571	10.3	1,119	14.9	1,129	20.1
- uppers of plastic	2,649	23.1	2,894	24.7	3,641	33.2
Other footwear with:						
- uppers of rubber or plastic	874	10.7	1,304	14.9	745	8.6
- uppers of leather	36,181	577.5	44,432	636.6	55,848	811.1
<b>Total</b>	<b>40,275</b>	<b>621.6</b>	<b>49,749</b>	<b>691.1</b>	<b>61,363</b>	<b>873.0</b>

Source: Eurostat (2008)

In 2007, EU imports of waterproof protective footwear with uppers of rubber came in terms of volume from: Italy 15% at € 15.13; Germany 10% at € 13.18; Spain 9% at € 10.09; UK 9% at € 33.18; France 9% at € 22.25; China 9% at € 4.22 and Serbia 6% at 5 19.89.

Waterproof protective footwear with uppers of plastic came in terms of volume from: Italy 23% at € 9.20; Netherlands 23% at € 11.04; Portugal 21% at € 6.65; China 11% at € 4.18; Belgium 4% at € 21.21; Germany 4% at € 10.32 and Albania 3% at € 3.94.

Other protective footwear, with uppers of rubber or plastic, came in terms of volume from: China 48% at € 8.77; Bosnia & Herzegovina 16% at € 5.26; Italy 14% at € 12.92; Portugal 5% at € 24.13; Turkey 4% at € 20.27; Vietnam 1% at € 7.03.

Other protective footwear with uppers of leather came in terms of volume from: China 38% at € 9.31; Tunisia 16% at € 13.87; Italy 15% at € 18.92; India 6% at € 12.04; France 4% at € 22.12; Germany 3% at € 31.80; Albania 3% at € 5.89 and Romania 2% at € 13.13.

Note: import prices are recorded at their CIF (cost, insurance and freight) value.

### Exports

Total EU exports of protective footwear amounted to 32.8 million pairs at an average export price of € 20.44 per pair in 2008. Almost a third of EU exports (in value) came from Italy, 15% from France, 12% from Germany, 6% from Finland and 5% from The Netherlands.

**Table 3.3 EU exports of protective footwear, 2003-2007, in € million**

	2003	2005	2007	Exported product groups in 2007		
				Water-proof	Uppers of leather	Uppers of rubber/plastic
Italy	218.2	210.1	222.4	8.0	212.8	1.6
France	69.4	78.4	100.1	3.7	94.3	2.1
Germany	66.2	70.9	77.8	1.0	76.4	0.4
Finland	22.4	25.9	37.5	0.3	37.0	0.2
Netherlands	28.0	40.3	35.8	14.1	21.4	0.3
Portugal	29.2	30.2	33.9	8.0	25.6	0.3
Romania	6.5	14.6	29.2	11.9	16.1	1.2
Belgium	15.4	17.9	28.3	6.0	21.2	1.1
Spain	6.3	21.0	24.2	4.5	19.5	0.2
Slovakia	20.5	12.3	18.2	0.0	18.2	0.0
Sweden	8.7	11.5	16.5	0.2	13.9	2.4
UK	19.5	13.4	12.6	0.5	10.6	1.5
Other EU ctrs (15)	20.2	25.0	33.6	3.7	26.8	3.1
<b>EU-27</b>	<b>530.5</b>	<b>571.5</b>	<b>670.1</b>	<b>61.9</b>	<b>593.8</b>	<b>14.4</b>

Source: Eurostat (2008)

82% of total EU exports (in value) went to other EU countries in 2007, of which Germany absorbed 22% of total exports and France and the UK each 7%. Main destinations outside the EU were Norway (4.4% of total EU exports), Switzerland (3.2%); Canada, Saudi Arabia, the USA and Russia (each country less than 1%).

Exports by several EU countries include re-exports: imported products, which are exported to other (mainly other EU) countries. The volume of re-exports can be calculated when national production statistics are available and the destination of production can be divided into domestic sales and exports by industry. The volume of re-exports is important for countries like Germany, The Netherlands and France, while re-exports in the other major EU countries are more limited, although growing.

#### **Opportunities**

- An increasing share of 45% of protective footwear imports into the EU came from DCs in 2007, against 34% in 2003 and 42% in 2005. This percentage was significantly higher for major EU countries like Italy (85%), the UK (68%), France (57%) and Spain (57%), though lower for Germany (22%), Belgium (30%) and The Netherlands (35%).
- Imports from DCs will grow faster than total imports in the coming years, mainly to the detriment of re-exports from EU countries.

#### **Threats**

- Import prices are still under pressure; average import prices were lower in 2007 than in previous years.
- A further decrease in average import prices will put more pressure on the remaining EU producers, but also on producers in DCs.

#### **Useful sources**

- EU Expanding Exports Helpdesk - <http://exporthelp.europa.eu> → go to: trade statistics
- Eurostat – official statistical office of the EU - <http://epp.eurostat.ec.europa.eu> → go to 'themes' on the left side of the home page → go to 'external trade' → go to 'data – full view' → go to 'external trade - detailed data'
- Understanding Eurostat: Quick guide to easy comext → [http://epp.eurostat.ec.europa.eu/newxtweb/assets/User\\_guide\\_Easy\\_Comext\\_20080117.pdf](http://epp.eurostat.ec.europa.eu/newxtweb/assets/User_guide_Easy_Comext_20080117.pdf)
- Euratex bulletins - <http://www.euratex.org>

## 4 Price developments

The following trends are visible in prices of protective footwear:

- Pressure on price levels, caused by an increasing concentration of buying power;
- Increasing supply and global sourcing of protective footwear (and other PPE products) exert pressure on processing and margins throughout the value chain;
- Cost prices in the processing industry are constantly rising;

Due to the diversity in products, it is difficult to focus on prices for individual products. Prices are influenced by many factors, like: type of distributor, market level often combined with brand name, volume of purchasing and many others. Sources for information on prices are visits to trade fairs, obtaining catalogues from manufacturers or wholesalers, reading trade magazines and surfing on Internet sites. Many websites giving price information are mentioned in the CBI market surveys, covering the PPE market in the individual EU countries. It should be noted that the number of these websites is much smaller than in the UK. Websites of distributors, including prices, can be found at <http://www.cover-up.co.uk>, <http://www.arco.co.uk>, <http://www.greenham.com>, <http://www.stratfords.com> and <http://www.protecdirect.co.uk>. Remark: prices are in British pound sterling (£).

Prices of competitors can be found by browsing their Internet sites or looking for general sites like <http://www.globalsources.com> or <http://www.alibaba.com>

Developments in average import prices per product type varied considerably, and illustrates for an important part, the countries of origin as mentioned in table 3.1.

Table 4.1 showed the differences between the average import prices (at CIF-value) for the major EU countries in 2007.

**Table 4.1 Average import prices of protective footwear by type of materials, 2007, in € per pair**

	Waterproof footwear with uppers of:		Other footwear with uppers of:	
	rubber	plastic	rubber/plastic	leather
EU	17.83	9.11	11.48	14.52
Italy	14.14	4.80	8.27	10.75
Germany	23.20	10.69	15.93	14.39
UK	11.45	5.19	7.95	13.79
France	14.02	9.32	14.72	13.39
Spain	17.72	9.84	15.29	10.04
Belgium	22.03	17.31	23.43	16.69
Netherlands	16.74	7.34	18.55	18.03

Source: Derived from Eurostat (2008)

## 5 Market access requirements

As a manufacturer in a developing country preparing to access an EU country, you should be aware of the market access requirements of your trading partners and the concerning national government. Requirements are demanded through legislation and through labels, codes and management systems. These requirements are based on environmental, consumer health and safety and social concerns. You need to comply with EU legislation and have to be aware of the additional non-legislative requirements that your trading partners in the EU might request.

For information on legislative and non-legislative requirements, go to 'Search CBI database' at <http://www.cbi.eu/marketinfo>, select PPE and an EU country in the category search, click on the search button and click on market access requirements.

### Packaging

Care must be given to the packaging of products if one intends to export to the EU countries. It is obvious that the packaging must be travel-steady. As required, products should also be

protected against the elements, changes of temperature, rough handling and theft. Besides, these basics of travel- and handle-durability, some importers may have specific demands concerning packaging, like information concerning the order printed on the boxes (order number, box number, name department or contact person etc.).

Leather shoes are generally packed in individual boxes per pair and 12 to 18 pairs in a carton. Here too, importers will most likely specify their packaging requirements.

Information about legislation concerning packaging and the treatment of packaging waste can be found on <http://www.cbi.eu/marketinfo>, while more detailed additional information about packaging techniques and the use of packaging materials can be found on the website of ITC: <http://www.intracen.org/ep/packaging/packit.htm>.

It is crucial, when planning exports to the EU, to take the packaging of your products (both sales packaging and transport packaging) into consideration. To fulfil the requirements of the target market, clear communication with the importer about packaging is necessary.

### Size marking

In 1994, the International Standards Organisation (ISO) published standards concerning the Mondopoint shoe sizing system, covering length and width grading. However, this method of marking is not generally accepted in the market. Two different size systems for footwear are used in the EU in general, sometimes in combination: the English size system (indicated as English points) and the more common Paris points or (continental) European sizing system. The table below provides a comparison between international size systems.

Foot length in cm	Size charts						
	Mondo	Europe (other)	England	Spain	Japan	USA women	USA men
							
22.3	217	35	2 - 2 ½	34	21.5	5	2 ½
23.0	225	36	3 - 3 ½	35	22.5	6	3 ½
23.6	232	37	4 - 4 ½	36	23.0	6 ½	4 ½
24.3	240	38	5 - 5 ½	37	24.0	7 ½	5
25.0	247	39	6 - 6 ½	38	25.0	8 ½	6
25.6	255	40	7	39	25.5	9	7
26.3	262	41	7 ½	40	26.5	10	8
27.0	270	42	8 - 8 ½	41	27.0	11	9
27.6	277	43	9 - 9 ½	42	27.5	11 ½	9 ½
28.3	285	44	10 - 10 ½	43	28.5	12	10 ½
29.0	292	45	11	44	29.5	13	11
29.6	300	46	11 ½	45	30.0	14	11 ½
30.3	307	47	12	46	30.5	14 ½	12 ½

### Other marking

Besides size marking, European regulations for safety, protective and occupational footwear demand the following compulsory information:

- Producer's identity number
- Producer's article number
- Country of origin
- Code of European standard: EN ISO 20 345. EN ISO 20 346 or EN ISO 20 347
  - EN ISO 20 345 - S 1 to 5 describes footwear with steel toe cap that gives protection against falling objects of 200 joules, as well as resistance against impact of 15,000 Newton.

- EN ISO 20 346 - P 1 to 5 describes footwear with steel toe cap that gives protection against falling objects of 100 joules, as well as resistance against impact of 7,500 Newton.
- EN ISO 20 347 - O 1 to 5 describes footwear without steel toe cap that is produced for professional use (occupational footwear), which secures the end-user exactly the same protection against injuries, except of course the steel toe cap, as all footwear certified to EN 347 fulfil the same standards as safety and protective footwear except the steel toe cap.

Protective footwear will be marked with one or more pictograms showing the performance levels against specific risks. An overview of the most important pictograms used for protective footwear, as well as a brief description, is included. More information can be obtained from the leading global and European manufacturers.

	Steel toe-cap (200 J)		Heat Resistant Outsole (300°C)
	Penetration resistant steel mid-sole		Abrasion resistant sole
	Antistatic footwear		Water vapour permeability
	Anti-slip sole		Hydrolysis resistant sole
	Anti-shock sole		Cold insulation
	Oil resistant sole		Water resistant footwear
	Water resistant upper		

Source: Cofra Italy

### Tariffs and quota

The EU common external import tariffs for protective footwear (as percentage of CIF value, without duties and VAT) are given in the table 6.3 of the CBI market survey 'The personal protective equipment market in the EU' and vary from 0.0% to 17.0%. There are no quota restrictions valid for protective footwear. Information on tariffs and quota can be found at <http://exporthelp.europa.eu>.

## 6 Doing business

General information on doing business, like approaching potential business partners, building up a relationship, drawing up an offer, handling the contract (such as methods of payment and terms of delivery) can be found in CBI's export manuals 'Export Planner' and 'Your image builder'. More specific information can be found in the CBI market survey 'The personal protective equipment market in the EU'.

For more information about common practices for sales promotion, including advertising, participation in trade fairs and other forms of communication with buyers, we refer to chapter 4 of the CBI survey 'Guidelines for exporting personal protective equipment to the EU'.

Furthermore, cultural awareness is a critical skill in securing success as an exporter.

Information on cultural differences in the EU can be found in chapter 3 of CBI's export manual

'Exporting to the EU'. These manuals can be downloaded from <http://www.cbi.eu/marketinfo> - go to search publications.

Interesting websites:

- The site of the German trade fair: A+A, Occupational Safety and Health – includes, among others, press releases, on subjects like boots in the working environment. See: <http://www.aplusa-online.de>.
- European Safety Federation (ESF) – <http://www.european-safety-federation.org> – including links to national organisations.
- Several protective footwear manufacturers give product information on their sites. A guide for (protective) footwear selection, for example, can be found at <http://www.heckel-securite.com>.
- Reports and press releases of Frost & Sullivan - <http://www.frost.com> and Key Note – <http://www.keynote.co.uk>.
- Several trade magazines, among others: Technical Textiles - <http://www.textilesintelligence.com> and Company Clothing – <http://www.company-clothing.co.uk>.

## Appendix A General product description

Footwear for working circumstances can be divided into safety footwear, protective footwear and occupational footwear, covering a wide variety of styles and includes shoes, ankle length boots and calf length boots. Specialist sectors involve items such as the protective clog, used in certain application sectors.

The following four European standards were ratified in 2004:

EN ISO 20344: Test methods for footwear (general requirements);

EN ISO 20345: Safety footwear with toe protection, which requires protection up to 200 joules;

EN ISO 20346: Protective footwear with toe protection, which requires protection up to 100 joules;

EN ISO 20347: Occupational footwear without toe protection used in working circumstances and requiring certain protection.

Partly based on the European standards protective footwear can be divided into:

- safety footwear;
- protective footwear; and
- occupational footwear, which can be divided into
  - special occupational footwear protecting the wearer from injury. Special features: without toecap, but with skid resistant, anti-static or similar characteristics;
  - standard occupational footwear, of low protective strength. Often part of uniformity (e.g. in public services or retail trade) not, or hardly, different from footwear on the consumer market.

Footwear in official statistics is limited to footwear incorporating a protective metal toe cap, and only divided into waterproof or other footwear. For that reason, only safety and protective footwear are discussed in this survey and are indicated as protective footwear.

Specific characteristics for the protective footwear market are:

- Hazards must be individually assessed to define the appropriate protective footwear for any particular application.
- Comfort and style should also be considered, and these factors are given considerable recognition by the designers of the footwear.
- Boots rather than shoes should be selected if ankle protection is required.
- Both materials and method of construction of the footwear should be considered.

The major protection from physical harm is offered by two main features:

- Impact-resistant toe-caps, mainly (more than 90%) of steel but also in lighter features of PU (polyurethane) and aluminium;
- Penetration-resistant steel mid-soles; construction and mechanical handling work generally require protection from falling objects or from piercing by sharp objects.

Other modes of protection are built in according to the needs of particular applications. These include:

- Thermal resistance (to both heat and cold) for extreme temperatures; cold conditions may require thermal insulation; hot conditions require footwear with heat-resistant or insulating soles;
- Material resistance to physical damage, penetration, cuts, abrasions; specially designed foundry boots should be worn in conditions where splashes of hot metal may be encountered;
- Water resistance to water penetration and water absorption. Wellington boots are generally selected for wet environments;
- Fuel resistance to petrol/gasoline and oil;

- Chemical resistance; footwear for chemical applications must be selected from materials that are both impermeable and resistant to attack;
- Resistance to hot contact (300° C/min);
- Anti-static properties; and
- Anti-slip properties.

The following products and CN code number are used by Customs and for statistical purposes in the EU countries:

- 6401.10.      Waterproof footwear with outer soles and uppers of rubber or plastic, the uppers of which are neither fixed to the sole nor assembled by stitching, riveting, nailing, screwing, plugging or similar processes, incorporating a protective toe cap:
  - 10      -- with uppers of rubber
  - 90      -- with uppers of plastic
- 6402.30.00    Other footwear with outer soles and uppers of rubber or plastic, incorporating a protective metal toe cap (until 2007)
- 6402.99.05    Other footwear with outer soles and uppers of rubber or plastic, incorporating a protective metal toe cap (from 2007)
- 6403.40.00    Footwear with outer soles of rubber, plastic, leather or composition leather and uppers of leather, incorporating a protective metal toe cap

The following products and PRODCOM code number are used in this survey:

- 1930.31.25    Waterproof footwear with rubber outer soles and uppers, including a protective metal toe cap
- 1930.31.27    Footwear with rubber or plastic upper soles and rubber uppers, including a protective metal toe cap
- 1930.31.35    Waterproof footwear with rubber or plastic outer soles and plastic uppers, including a protective metal toe cap
- 1930.31.37    Footwear with rubber or plastic outer soles and plastic uppers, including a protective metal toe cap
- 1930.31.40    Footwear with a metallic toe-cap, of rubber or plastic and uppers of rubber or plastic
- 1930.31.50    Footwear with rubber, plastic or leather outer soles and leather uppers, including a protective metal toe cap

This survey was compiled for CBI by F&V

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