



The 2006-2015 Outlook for the Athletic Shoe Market in Russia

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Summary

According to the estimates of BusinesStat, the Russian market of athletic shoes will show stable growth in volume terms by 3% annually. At the same time, the main problem of the market is the shadow import, which amounts to 60-85% of the total volume of import of shoes. Uncontrolled import of cheap and low quality athletic shoes to the territory of Russia acts as one of the most significant barriers for the development of domestic production.

Between 2006 and 2010 the volume of sales of athletic shoes in Russia went up by 13% to 33.3 thousand pairs. During the same period the volume of import of athletic shoes into Russia increased by 20% from 23.9 to 28.7 thousand pairs.

According to our estimates, the trend towards the growth of sales of athletic shoes will persist during the next years.

The 2006-2015 Outlook for the Athletic Shoe Market in Russia contains the essential data, necessary to comprehend the current market opportunities and conditions and to assess the future prospects, covering such points as:

- The overall assessment of the economic environment in Russia
- Capacity of the athletic shoe market
- Balance of demand for and supply of athletic shoes
- Number of customers and volume of purchase
- Economic output, total exports and imports, the volume of merchandise in storage
- Cost price, retail price, import and export cost
- Ratings of the industry in terms of economic output and sales revenue
- Financial and economic profiles of leading enterprises.

In the survey the produce is categorized the following way:

- Cross training shoes
- Track and field shoes
- Athletic shoes of the cross training type
- Rubber athletic shoes

The report gives detailed information on production, export, import and prices for athletic shoes according to the nomenclature of the Foreign Economic Activity Commodity Nomenclature (FEACN code).

In terms of nomenclature the report gives an account of ski boots, cross country boots, snowboard boots, shoes for tennis, basketball, gymnastics and other types of athletic shoes.

The report presents data on the largest manufacturers of athletic shoes:

Unichel Footwear Firm, Severohod Factory, Spartak Footwear Factory, Ryazanvest, Czisin Commercial and Industrial Company, Dinamo Footwear Factory, Hua-Sin, Yuiber, Kapriz-TM Footwear Factory, etc.

BusinesStat carries out researches into the global athletic shoe market as well as local markets.

The survey of the Russian market contains data concerned with different regions of the country.

The survey is based on the official statistics, obtained from:

- Federal State Statistics Service of the Russian Federation
- Ministry of the Economic Development of the Russian Federation
- Federal Customs Service of the Russian Federation
- Federal Tax Service of the Russian Federation

Apart from the official statistics, the survey also contains the results of the research done by BusinessStat:

- Survey of consumers of shoes
- Audit of shoe retail trade
- Survey of experts of the shoe market

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Opportunities of the Russian Economy

According to the economists' estimates, Russian economy has no chances for either a slump or a significant growth in the foreseeable future. By any forecast, the annual growth rates of the world economy will not exceed 3% in the years to come, consequently, Russian raw material export has no opportunities for increasing. Besides, developing technologies of oil-bearing sands exploration and shale gas production presuppose drop of prices for crude hydrocarbons. Taking into consideration the fact that costs of oil and gas production in Russia keep growing, the country can lose its source of income in the course of time.

Internal demand lives little hope as well. The measures of the RF Government to stimulate economy have no good effect. A regular increase in pension does not lead to the growing demand for food and goods, because the consumption level of the Russian senior citizens is too low. They tend to save money. Salaries in the state-financed and business sectors are practically frozen, which causes decrease in the real household income and consumption level against the backdrop of the growing inflation.

Demographic trend is also negative. Depopulation of the country will neutralize the effect of growing income even in the most distant prospect.

The Government of the Russian Federation has been lately making attempts to build up businesses that will produce goods with high value-added tax. It is obvious that these measures will not be effective in the context of general and chronic economic backwardness and inefficient state administration. Under the circumstances of the growing internal demand, there is no manufacture of the whole range of consumer goods in the country. Salary increase and loan availability encouraged consumption of imported goods.

Thus, Russian economy, that has no new export sectors, loses the internal market, too. Meanwhile, international corporations continue raising their market shares in Russia owing to their large scale and higher efficiency of transactions.

According to Kseniya Yudaeva, Director of the Centre of Macroeconomic Research of Sberbank, Russia is running the risk of being stuck for the long run in the situation of low rates of economic growth. In order to escape the situation of economic stagnation the country needs a transition from the growth on account of consumption to the growth on account of investments.

Classification of Athletic Shoes

Athletic shoes are designed for doing different sports. They differ from shoes of other groups by features of design, conditioned by their purpose and functions of defense of a sportsman's foot against possible injuries, dislocations and muscle pulls. It is required that athletic shoes are durable and reliable in usage, as well as tight fitting and comfortable for the foot.

Athletic shoes must meet specific requirements, defined by the purpose of the shoes. Shoes for tourists, skiers, mountaineers must have features of high level of heat shielding, water resistance and versatile styling. Shoes for mountaineers are made with a double sole. The ones for skiers have a lightweight flexible sole, whereas shoes for slalomists and ski jumpers are high and have a thick inflexible sole with special belts fixing the ankle joint. Shoes for speed skaters are lightweight with a narrow sole and welts for better steadiness on skates. Track and field shoes are lightweight, without hard backs and toes, coarse seams and folds inside. Shoes for wrestlers, boxers and weightlifters are made from strong soft leather with covered ankle joint.

Value of Sales

Table 24. Value of sales of athletic shoes in Russia, 2006-2010 (million rubles; %)

	2006	2007	2008	2009	2010
Sales value (million rubles)	18,910.50	20,836.06	23,932.53	26,705.79	30,053.00
Dynamics (% deviation to previous year)	-	10.2	14.9	11.6	12.5

Source: *BusinesStat, Complex Analysis of Marketing Data*

Table 25. Forecast of the value of sales of athletic shoes in Russia, 2011-2015 (million rubles; %)

	2011	2012	2013	2014	2015
Sales value (million rubles)	33,047.03	36,210.49	39,161.15	42,132.17	45,183.25
Dynamics (% deviation to previous year)	10.0	9.6	8.1	7.6	7.2

Source: *BusinesStat, Complex Analysis of Marketing Data*

Between 2006 and 2010 the value of sales in the athletic shoe market in Russia went up by 1.6 times. The rates of growth of the sales value are higher than those of the sales volume. The outrunning growth in revenue is caused by the increase in prices for athletic shoes and the shift of consumer preferences to a higher price segment.

Most of sales of athletic shoes currently fall on the medium-low and medium-medium price segments. These two segments are the most dynamic ones; the sales of these two segments grow fast owing to the shift of consumer preferences from the low price segment, which is in its turn connected with improvement of the welfare of Russians.

During the period from 2011 to 2015 the value of sales will continue growing. By 2015 it will have reached 45,183 million rubles.

Table 28. Average retail price for athletic shoes by region, Russia, 2006-2010 (rubles per pair)

	2006	2007	2008	2009	2010
Adygeya, Republic	775.60	849.87	845.56	868.37	859.27
Altai, Republic	440.43	483.30	559.36	582.10	647.94
Altai Region	573.80	640.91	721.98	840.11	897.86
Amur Region	493.98	518.05	526.38	609.09	659.69
Arkhangelsk Region	841.90	872.23	1,012.30	1,089.83	1,208.76
Astrakhan Region	914.55	1,180.19	1,012.90	948.70	908.39
Bashkortostan, Republic	571.75	615.28	665.70	771.25	848.33
Belgorod Region	489.89	546.54	603.72	666.95	721.34
Bryansk Region	612.38	601.76	644.91	707.74	772.38
Buryatia, Republic	415.60	516.33	704.93	733.74	821.68
Vladimir Region	534.76	547.14	611.32	708.75	790.16
Volgograd Region	618.23	672.98	705.67	758.99	822.90
Vologda Region	611.14	634.17	671.68	718.57	754.32
Voronezh Region	524.50	661.72	765.12	874.31	971.18
Dagestan, Republic	729.88	743.59	791.91	926.09	1,056.39
Jewish Autonomous Region	836.51	982.41	1,135.14	1,315.10	1,519.66
Zabaikalie Territory	524.20	552.09	568.41	642.70	704.14
Ivanovo Region	552.50	623.06	655.35	731.19	803.56
Ingushetia, Republic	646.97	692.69	725.17	856.33	922.00
Irkutsk Region	599.39	710.69	772.96	830.20	891.82
Kabardino-Balkaria, Republic	425.71	452.03	531.86	653.48	738.72
Kaliningrad Region	625.49	662.65	668.77	774.23	818.15
Kalmykia, Republic	492.26	492.26	511.33	569.54	639.92
Kaluga Region	621.63	673.94	732.19	908.92	1,055.44
Kamchatka Territory	1,234.84	1,446.41	1,439.70	1,818.36	2,056.59
Karachaevo-Cherkessia, Republic	510.80	598.53	675.59	800.11	834.96
Karelia, Republic	605.35	639.72	681.75	825.18	910.98
Kemerovo Region	710.08	743.70	781.81	833.75	872.77
Kirov Region	642.74	672.13	700.10	784.36	852.59
Komi, Republic	717.29	703.36	669.94	778.60	863.87
Kostroma Region	464.10	484.84	489.21	571.46	697.01
Krasnodar Territory	596.02	634.72	728.80	784.09	844.75
Krasnoyarsk Territory	615.83	718.68	752.79	794.38	856.87
Kurgan Region	671.71	731.40	756.88	745.81	813.72
Kursk Region	664.31	692.58	601.11	712.01	746.56
Leningrad Region	700.18	723.07	780.15	891.26	997.62
Lipetsk Region	520.21	572.40	646.31	789.76	893.81
Magadan Region	828.84	914.97	1,090.99	1,266.75	1,424.87
Mari El, Republic	455.46	487.60	533.77	685.74	728.40
Mordovia, Republic	489.55	521.18	571.32	732.13	812.40
Moscow	809.95	870.97	987.76	1,085.43	1,192.39
Moscow Region	506.77	539.39	605.65	668.10	737.04

Murmansk Region	806.97	840.28	876.93	960.99	1,096.96
Nizhniy Novgorod Region	649.03	745.54	807.64	812.98	847.86
Novgorod Region	584.88	558.34	648.56	747.36	823.62
Novosibirsk Region	770.85	828.56	909.10	976.60	1,029.62
Omsk Region	523.83	556.68	608.92	669.03	719.23
Orenburg Region	620.92	690.25	706.63	703.07	779.03
Orel Region	569.00	558.98	588.20	696.86	732.78
Penza Region	504.94	547.32	622.51	723.95	851.96
Perm Territory	672.34	719.44	841.97	998.84	1,085.92
Primorie Territory	631.88	674.80	697.88	763.98	867.97
Pskov Region	483.50	539.57	596.08	637.02	673.83
Rostov Region	769.35	860.31	772.50	849.24	928.69
Ryazan Region	509.35	569.61	665.25	785.66	862.11
Samara Region	728.72	820.39	866.25	1,011.28	1,039.53
Saint Petersburg	709.58	749.22	795.52	852.46	883.04
Saratov Region	623.48	635.03	662.35	642.54	704.53
Sakha Yakutia, Republic	906.43	976.04	1,225.83	1,270.63	1,380.11
Sakhalin Region	722.64	755.92	774.88	926.22	1,131.80
Sverdlovsk Region	736.54	771.28	808.14	877.86	919.92
North Ossetia-Alania, Republic	612.66	628.33	735.17	859.98	941.27
Smolensk Region	614.09	681.19	760.14	833.58	901.20
Stavropol Territory	581.97	615.85	648.84	751.23	759.92
Tambov Region	492.82	522.35	549.03	779.04	851.95
Tatarstan, Republic	568.60	620.76	620.03	671.69	752.35
Tver Region	545.82	602.83	636.11	721.03	798.24
Tomsk Region	614.19	655.91	727.18	799.95	859.66
Tula Region	568.49	602.93	678.19	742.72	797.58
Tyva, Republic	591.94	648.55	706.24	745.30	785.46
Tyumen Region	699.41	766.76	845.45	953.60	1,059.56
Udmurtia, Republic	442.79	493.82	616.74	619.19	663.32
Ulyanovsk Region	585.38	590.89	639.49	696.08	744.14
Khabarovsk Territory	1,096.18	1,153.58	1,240.57	1,345.19	1,511.58
Khakassia, Republic	597.51	621.23	678.70	846.76	924.34
Chelyabinsk Region	657.03	665.48	711.75	762.24	819.36
Chechen Republic	-	-	1,043.03	1,446.70	1,535.85
Chuvashia (Chavash), Republic	488.73	548.61	568.54	669.71	758.90
Chukotka Autonomous District	910.35	985.66	998.93	927.44	1,091.15
Yaroslavl Region	615.98	642.96	647.61	712.47	782.10
Russia	641,84	693,13	746,53	831,55	903,49

Source: Federal State Statistics Service. Form № 1 "Form for Registration of Prices for Goods and Chargeable Services".

The highest prices for athletic shoes in 2010 were registered in the Kamchatka Territory. The price for a pair of athletic shoes equaled 2,057 rubles.

Value of Export

Table 70. Value of export of athletic shoes from Russia, 2006-2010 (thousand dollars; %)

	2006	2007	2008	2009	2010
Export (thousand dollars)	1,716.68	1,075.63	1,161.48	1,770.63	2,077.22
Dynamics (% deviation to previous year)	-	-37.3	8.0	52.4	17.3

Source: Federal Customs Service of the Russian Federation, Customs declaration / Transit Declaration for participants of the foreign economic activity "Record of Goods and Fund Transit across the Border".

Index "Export of Athletic Shoes" is calculated by multiplying the net weight of the cargo (tons) by the cost of one ton of the cargo (dollars per ton). The weight of all the cargoes is taken into consideration. Unit of account: all enterprises engaged in foreign economic activities in Russia.

Table 71. Forecast of the value of export of athletic shoes from Russia, 2011-2015 (thousand dollars; %)

	2011	2012	2013	2014	2015
Export (thousand dollars)	2,222.16	2,340.25	2,485.33	2,605.03	2,775.00
Dynamics (% deviation to previous year)	7.0	5.3	6.2	4.8	6.5

Source: BusinesStat, Complex Analysis of Marketing Data

Table 72. Value of export of athletic shoes from Russia, by product type, 2010 (thousand dollars)

	2010
Ski boots, cross country boots and snowboard boots	109,264
Shoes for tennis, basketball, gymnastics, training and analogous shoes with a sole of rubber or plastic and an upper of textile materials	902,896
Other athletic shoes	1,065,060
Total	2,077,220

Source: Federal Customs Service of the Russian Federation, Customs declaration / Transit Declaration for participants of the foreign economic activity "Record of Goods and Fund Transit across the Border".