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Global safety footwear review

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Safety footwear is one of the very few types of footwear which has to meet fairly demanding requirements in terms of national and/or international standards. There has to be a commitment on the part of the producer and supplier to have the products tested and certified by a recognised body. In the past until quite recently, relatively speaking, it was possible for some countries to protect local manufacturers with national standards and factory inspections, with Europe being a good example. There was also some disagreement as to which levels of protection were appropriate and which categories of footwear needed to be covered.

For example, the German approach at one time favoured a relatively high 'catch all' level of protection for most

categories of safety and work footwear. The UK and others' approach tended to apply varying levels of acceptance according to the type of use. For example, high risk, heavy work situations could/should be differentiated from low risk/lighter work situations. The cost of factory visits was, perhaps, another step too far for would be exporters to Europe.

Another factor determining the demand for safety footwear was the shift in both production and consumption. Footwear manufacture has, in general, migrated to lower wage cost countries in the Far East, above all, China. Consumption of safety footwear has been affected by a similar shift in heavy industry to lower cost countries, with the added factor that the use of standards may be less

there. Exports to Europe or North America and other developed countries will nevertheless still require compliance.

With the trend to economic trading blocs and free trade areas, the take up of international standards has gathered momentum and this has probably led to the classic economic choice for manufacturers of safety footwear. Either meet the basic international standard requirements as a producer/supplier and compete on price or meet the requirements and add value through service, delivery or additional features.

The international standards which have to be met include the European initiated EN ISO 20344 and 20345 (plus 12568-covering toe caps), the USA ANSI F2412 (Test Methods for Foot

Protection) and F2413 (Specification for performance requirements for protective footwear) and the Canadian Z 19502- Protective Footwear.

THE GLOBAL MARKET

To quantify the safety footwear market on a global basis is not easy due to factors such as the collection, verification and differentiation of production figures in many countries. Even developed countries do not always carry out the collection of production statistics on a scale which was carried out in the past.

The global market for industrial protective footwear has been estimated by Research & Markets at \$2.37 billion in 2012, rising from 2013 at an annual CAGR (compound annual growth rate) of 8.5% to \$4.3 billion in 2019. Transparency Market Research indicates that the market in 2013 was worth \$6.32 billion and could reach \$9.46 billion by 2020 with a CAGR 2014-2020 of 6%. Another source estimates a market of \$3.72 billion in 2014. These differing statistics are partly due to the scope of the footwear covered.

In North America in 2013 the construction industry was the leading user of protective footwear, spending \$668.3 million with stable growth expected for the next five years. Oil & Gas was the fastest growing sector at \$158.4m. Europe was the largest overall market in 2013 with leather footwear the leading type with sales of \$1,890 million and further steady growth forecast. Synthetic footwear was expected to grow most strongly with a CAGR of 7% until 2020.

In 2015 the volume of safety footwear production increased globally by 7.8%, with China up by 6.9% and Asia, as a whole, by 10.2%. This meant that Asia was responsible for 53% of world production. It is predicted that by 2018, total output will be approaching 400 million pairs of which Asia will be producing 58%.

NEW COMPANIES HAVE APPEARED

In Europe and the USA, legislation and standards have driven the supply of protective and safety footwear, although the amount of low cost footwear dampens the value of sales. Furthermore, automation in manu-

Regional share (%)

	2014	2015
Far East	52.3	53.5
Middle East	2.4	2.4
Eastern Europe	9.6	9.3
Western Europe	9.0	8.3
South America	10.5	10.4
North & Central America	10.0	10.0
Africa	6.0	5.9
Oceania	0.2	0.2

facturing and other industries has reduced the workforce and need to protect them. Women's safety footwear has risen, particularly in the USA, as has the supply to niche markets.

There has also been some movement in the leading safety footwear companies which had become market leaders in their own sectors and subsequently found difficulties with the rising competition from the Far Eastern safety footwear companies. Totectors based in the UK was a well known name in the sector but the production facility had to be sold. The name lives on, however, as Totectors UK which bought the brand in 2014.

Jallatte was also a leading manufacturer and name in the industry. The eventual formation of the JAL Group incorporating French, Italian, German and Tunisian interests, expertise and labour meant that it became one of the largest safety footwear producers in Europe if not the world. Again, this could not be maintained and the Group collapsed with the loss of much of its labour force, particularly in Tunisia. U Power of Italy took over some of the assets and Jallatte has continued at a reduced level in France.

With a 'vacuum' at the top, other groups have come to the fore, mainly based on Far Eastern manufacturing strengths. Golden Chang was one of the first Far Eastern companies to take a step forward as a leading safety footwear manufacturer and as possibly the leading producer of Goodyear Welted footwear. It is now part of the Oftenrich Group which consequently is also amongst the leading safety footwear manufacturers vying for market leadership in terms of volume

supplied. Other groups which have emerged in developing countries includes BSB Group of Brazil, Saina of China and Rahman of India.

Some traditional safety footwear companies have also still managed to keep a strong presence although this may be a case of concentrating more on niche markets or higher quality footwear. Bata Industrials, Wolverine Group and the newly formed BBF group in South Africa are based on a strong heritage.

DRIVERS FOR FURTHER EXPANSION

The present expansion in the use of safety footwear has been due in large part to the growth in inexpensive footwear. In the future there may also well be an increased emphasis on adding value. The potential in China should continue, albeit at a slightly lower rate in the shorter term. Other BRICS countries may see a varied pattern of demand. India should show strong growth, whilst Brazil and Russia have shorter term problems to overcome. The demand for women's safety footwear should grow further and new niche markets will become evident. Automation and the use of robots is present in the sector and will expand and give further impetus for faster and less expensive production which in turn should help expand consumption. 

This article is based on extracts from the author's recently produced World Safety Footwear Review which gives further information on the sector including data on 600 manufacturers and suppliers and information on over 80 countries.