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EXPORT MARKETING BUREAU
G/F and 2/F DTI International Bldg.
375 Sen. Gil Puyat Avenue
Makati City 1200, Philippines

Tel. No.: (632) 8465.3300
Fax No.: (632) 8899.0111

<http://www.dti.gov.ph/exports/>
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Footwear in the Czech Republic

Sports footwear and sport-inspired footwear had shown the greatest resilience during COVID-19 in 2020, as the lockdowns and gymnasium closures triggered solo sporting activities. The demand for running and hiking shoes has been well supported, otherwise, sluggish sales would have been expected. However, the ban on collective and indoor sports have negatively impacted sales of football boots and fitness shoes.

The internet channel has been further strengthened due to COVID-19 in 2020, as consumers have been attracted by the wide selection of sports apparel/footwear and sport-inspired footwear, alongside additional discounts and free delivery.

Fewer Dressing Up Occasions Hit Smart Footwear Sales Hard, while Children's Footwear is Somewhat Supported by the Need for New Sizes of Shoes

Smart footwear, such as women's occasion shoes, has been particularly hit hard by COVID-19, as the outbreak started just at the time when consumers were beginning to shop for spring shoes. During this time, sales almost came to a halt because there were no occasions to dress up for work or special events. Thus, many retailers counted on "back to school" shopping to boost their business later in the year.

However, this strategy saw challenges as many parents waited to see what would happen first before shopping for school wear. The second wave of COVID-19 presented itself just after the end of the summer holidays and many schools, especially in the capital city, closed down due to the COVID-19 cases. As seen with children's clothes, it is not possible to delay repeat purchases of children's shoes for too long because larger sizes are needed when children grow. This point helps children's footwear show one of the least sharp declines across the whole footwear category.

Highlights

- Sports footwear and sports-inspired footwear helped temper the declines seen in other footwear categories due to COVID-19 in 2020.
- Sales via e-commerce channels are expected to remain high because many consumers will take advantage of discounts and some exclusivity on certain branded sneakers that market themselves via this method.
- Footwear is expected to see recovery from 2021, with sports and sports-inspired footwear are expected to drive sales. Also consumers will continue their sporting activities which they took up in 2020, along with a higher demand for sports-inspired footwear coming from the more relaxed dress codes seen in workplaces.

Lidl Creates Recycled Range, CCC Launches Mobile App, and Footshop Opens a Second-hand Store

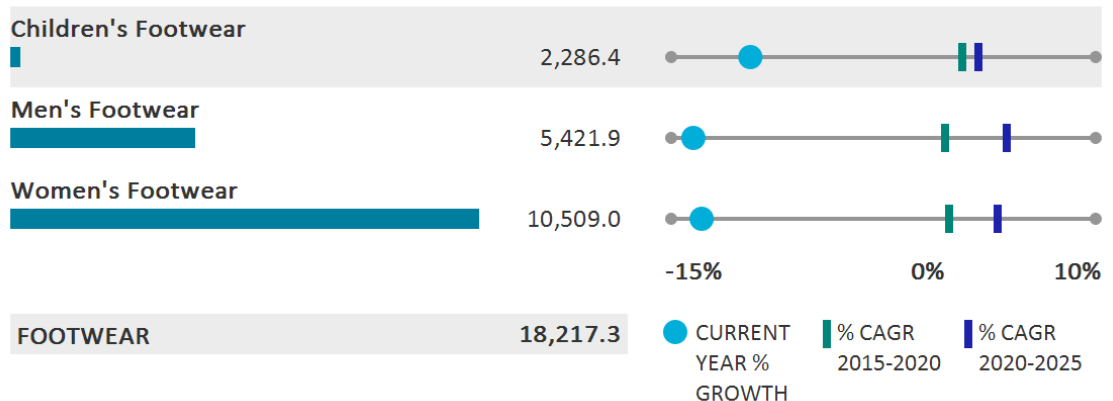
Deichmann-Obuv s.r.o. maintains its lead in footwear in 2020, thanks to the players' wide range of products which offer a good ratio of quality and price. Furthermore, the Deichmann stores have gone on to gain a degree of global acclaim, which also helps boost the brand image.

With regards to the developments, Lidl Ceska Republika Vos followed the sustainability trend by creating a collection of recycled Ocean Bound plastic sport and leisure shoes which became available from its lidl-shop.cz from June 2020. The prices range from CZK299-399 depending on the model and size, and Lidl reported that sales have been as successful as its Lidl logo range which was launched earlier in 2020.

Sales of Footwear in Czech Republic by Category

Retail Value RSP - CZK million - Current - 2020

Growth Performance



CCC Czech sro (with its namesake brand) launched a new mobile application in January 2020. After launching its e-shop at the end of 2019, the CCC shoe brand took another step in the field of e-commerce. The new mobile application has aimed to connect the online and offline sales channels which undoubtedly helped to generate additional sales during the pandemic.

Furthermore, demonstrating the strong revival of second-hand shopping, the Footshop - a Czech retailer selling streetwear fashion and footwear, opened its first premium second-hand shop selling clothing and accessories. Called The Second, the shop is located in the multifunctional space Vnitroblok in Holešov, where there is also a classic Footshop store.

RECOVERY AND OPPORTUNITIES

E-commerce Channels Set to Go from Strength to Strength

The internet channel will continue to play an important role over the forecast period. Sales via this channel are expected to remain high, as many consumers will take advantage of further discounts and some sort of exclusivity on certain branded sneakers which market themselves via this method.

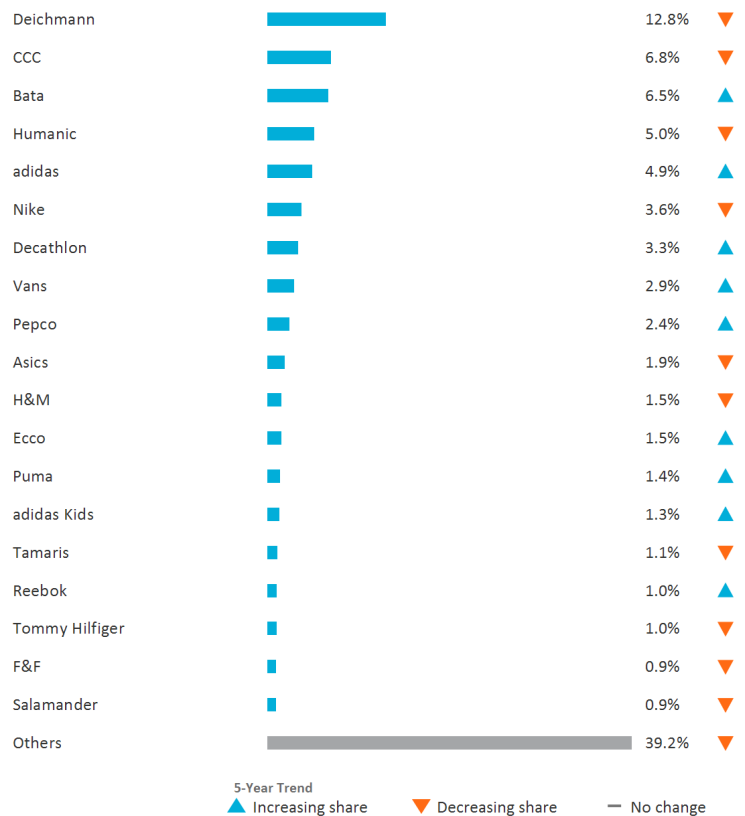
Recovery Expected to be Led by Sports and Sports-inspired Footwear Trends

Overall, footwear is expected to see recovery from 2021, with sports and sports-inspired footwear expected to drive sales. This is because consumers are expected to continue indulging in the sporting activities which they took up in 2020, along with a higher demand for sports-inspired footwear coming from the more relaxed dress codes seen in workplaces alongside the higher incidence of home-working, thus inspiring more casual and comfortable styles of shoes.

Two-way Polarization Expected Across Footwear Over the Forecast Period

Price polarization is expected in footwear, both at the higher and lower ends of the price brackets. Consumers are likely to trade premium brands for cheaper alternatives. However, exclusive online discounts on higher-end products will also attract a larger number of consumers who will be able to afford to trade up and purchase more premium brands. ■

Brand Shares of Footwear in Czech Republic
% Share (LBN) - Retail Value RSP - 2020



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