

WHAT AILS THE INDIAN FOOTWEAR INDUSTRY?

An Analytical Study of the Problems Faced By Indian Businesses in Creating Global Footwear Brands

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Abstract

The study is focused on Indian footwear industry. Research aims to identify the factors that have led to absence on any Indian footwear brand in the top 50 global footwear brands.

Middle to senior level employees with work experience of over 15 years in the footwear industry were contacted for in depth interviews. They were also asked to fill a questionnaire developed on the basis of literature review. Sample size of the study was 207. The responses were analysed using appropriate statistical tools.

It was found from the study that there are six major problem areas i.e. marketing practices, human resources, functions and processes, supply chain management, facilities for manufacturing; safety & environmental concerns. Among these six types of problems, the area which is most problematic is *marketing practices* followed by *human resources*. It was also found from the study that all personnel from the five major footwear companies have same opinions towards the problems of Indian footwear industry. Thus, based on the results of this study, it can be said that Indian footwear companies need to work on the areas of concern outlined in the paper.

Keywords: *Footwear, India, Brand, Marketing Practices, Supply Chain Management, Functions and Processes*

Introduction

Indian footwear industry is the world's second largest footwear industry, after China. Total global market share captured by the Indian footwear industry is 13 percent, which is a distant second in comparison to China which holds 67 percent of global footwear market share. Total production of Indian footwear industry is 2.2 billion footwear pairs out of which 180 million footwear pairs are exported by the industry. The countries that are major players in footwear industry at global level are China, India, Brazil and Vietnam with total production of 14.2, 2.2, 0.9 and 0.8 billion pair of shoes respectively. 20 percent of Indian domestic footwear market has been captured by Chinese producers. 63 percent of the Imported shoes in India are coming from China, which are valued around 65 billion rupees. The percentage of imported shoes from China has increased from 63 to 96 percent during last five years, which has increased the outflow of foreign exchange in the country.

Indian footwear industry is one among the 25 sectors which have been recognized as top priority sector by Government of India under the 'Make in India' plan. Indian footwear industry has shown robust growth in the past. The Total value of the industry was 7.8 USD billion in the year 2009, which increased to 12.8 USD billion in the year 2014, and is expected to increase up to 80 USD billion by the year 2030.

40 percent of footwear sold in the Indian market is sold through modern retail channels and 60 percent is sold through the unorganized sector. Indian footwear sales are comprised of 20 percent leather footwear and 80 percent synthetic footwear.

Although India has the second largest footwear industry, yet Indian footwear manufacturers have failed to create any global footwear brands or establish market leadership in footwear production and export.

Some of the major problems in the footwear industry as identified by various experts are - ownership structure of the companies, tax structure, lack of incentives, and lack of trained employees. As far as the ownership of firms in the industry is concerned, majority of the footwear production is done through partnership firms or proprietorship firms. These structures are typical of high risk avoidance among entrepreneurs and are not very attractive to external investors.

Another major challenge to the industry is the lack of funds to invest in the marketing and promotional activities. Employees in the footwear sector are often trained in niche, skill domain. Business acumen and therefore business innovations are rare.

Government has planned to accelerate research in footwear and allied areas through specialised institutions. The focus of research and development activities will be on new technologies, or new methods for footwear production, innovative material for footwear production, and lab testing facility for footwear. Focus will also be on training to the employees working in the footwear industry, to enhance their skill levels. All these steps should help establishing India as a global brand on the basis of quality, and innovations. Trained employees and research & development activities will help in improving the quality of the products. Change in tax structure, , fund allocation by government for marketing of footwear industry, and attracting foreign direct investment in the country in footwear industry are also factors that can play a great role in the growth of the footwear industry. Thus, keeping in view the importance of Indian footwear industry in the growth of Indian economy, current study is an attempt to identify the problems related to Indian footwear industry. The focus is on identifying factors that have restricted Indian footwear manufacturers. The attempt is to understand why India, despite being among the biggest manufacturer and exporter of footwear in the world is unable to create global footwear brands.

Review of Literature

Hussain (2016) conducted a study to measure the performance of Indian footwear industry. Researcher has highlighted the problems and future prospects of the Indian footwear industry. It was stated in the research that Indian footwear industry is one of the major priority sectors but actual research output is very low. Lack of finance is another major problem before the industry. According to the report of ONICRA (2014) government should liberalize the norms for FDI investment in this sector which can help in improving the access of finance to the Indian footwear industry. Another research by Mukherjee et al. (2010) stated that there is a need to develop the infrastructure for the growth of the Indian footwear industry. There is a lack of proper infrastructure facilities in the footwear sector which is creating major problem in the growth of the sector. Government should provide the necessary infrastructure to the sector, and tax subsidies for opening of new units for the manufacturing units in the footwear industry.

Sharma (2014) highlighted that there is a need to develop the Indian footwear industry to reduce the quantity of footwear imported from China. China is dumping its surplus production in the Indian domestic market at an exceedingly low cost which is not only reducing the market share of domestic producers but is also resulting in massive job losses. Government should promote marketing function for improving and strengthening our export relationships with the other countries for the benefit of the Indian footwear sector. All the marketing activities for promotion of exports of Indian footwear should be tax exempted (Ranjan, 2013).

Tiwari (2005) has stated that one of the major problems of Indian footwear industry lies in the area of industrial relations. Labourers working in the footwear industry are not satisfied with the wages or salaries, working conditions of the footwear companies are very poor, there is no provision for the health insurance of the employees and there are few arrangements for the sanitation or for safety of the employees.

It was also found in various studies that there is an acute shortage of skilled and trained manpower in the footwear industry, due to which there are fewer prospects of growth or development in this sector. Inefficiency of employees leads to low productivity of the footwear companies (Rajiv, 2016). Indian leather and footwear Industry report (2006) stated that government should make strict labour laws for the footwear companies to follow to encourage people to work in the footwear companies and to raise the standard of employees. Industrial and labour laws will lead to industrial peace in the sector. In addition to this, government should make efforts to promote the special educational courses related to the footwear industry to create skilled and expert manpower for the industry. Institute with national level importance should be established to provide special diploma or degree programs in footwear sector (Doshi, 2007).

Anand and Alkeya (2014) stated that Indian footwear industry is not able to cope up the changing demand or tastes of the customers and this is the major reason why China is exporters are finding success in India. According to KPMG (2016)report, Indian footwear companies need to focus on the technology development as per the need of the customers, to provide large variety of footwear to the customers, should also focus on research and development activities. Research stated that the reason for the lack of research and development activities in the footwear sector is lack of funds and the lack of awareness among the management about the importance of these activities.

Further, it was noted study that marketing is the weakness of the Indian footwear industry (ICRA,2015).

Keeping in view the above factors, current research will be an effort in the same direction to conduct a survey based research to know the opinions of the employees in footwear manufacturing companies India regarding constraints faced by footwear manufacturers. Research aims to identify the factors that have led to absence on any Indian footwear brand in the top 50 global footwear brands.

Objectives

1. To identify the problems faced by Indian footwear manufacturers in creating global footwear brands.
2. To measure the difference in the opinions of the footwear companies related to these problems identified.

Research Methodology

Research is based on the primary data collected from the middle to senior level management employees of the companies who are responsible for framing the marketing policies and formulating the strategies for the growth and are involved in the branding process at major Indian footwear manufacturers. The sample size was 207. Researcher interviewed 47 respondents who consented to be a part of the research. Thereafter, professionals in the footwear industry were asked to fill a questionnaire developed on the basis of the review of literature and collected the data from all the respondents. 207 completed questionnaires were analysed.

In order to classify the various problems under some certain categories, factor analysis method (Kruskal Wallis test) has been used.

Findings and Discussions

This section deals with the analysis of primary data collected from the senior level management employees of the leading footwear manufacturing companies of India. The constraints identified can be categorized into six categories or factors namely *Human Resources, Functions and processes, Facilities for Manufacturing, Supply chain management, Safety & Environmental concerns* and *Marketing practices*. Total variance explained by all the six factors was 90 percent and remaining ten percent variance can be attributed to some other factors or chance factors. These factors have been explained below:

- 1. Problem related to Marketing practices:** Table 1 shows the Cronbach Alpha of the factor i.e. marketing practices, items which are represented by this factor along with the factor loadings.

Table 1: Problems related to Marketing practices

Cronbach Alpha = 0.834, Variance = 23.012		
Particulars	Factor Loadings	Mean Value
Lack of awareness about customer preferences	0.898	0.412
Lack of awareness about the competitors	0.823	0.423
Insufficient funds for marketing activities	0.801	0.452
No involvement of marketing department in the product design process	0.792	0.342
Lack of product innovations	0.768	0.445
Lack of process innovation	0.743	0.401
Lack of social media marketing practices	0.689	0.412
Lack of support from government for marketing of export goods	0.612	0.344
Lack of conduct of marketing research	0.601	0.365
Lack of awareness about the changing needs, tastes, preferences of customers	0.598	.330
Lack of promotional activities	0.555	0.404

Interpretation: It can be interpreted from the table 1 that the highest loaded item on the *Marketing Practices* factor is Lack of awareness about customer preferences followed by Lack of awareness about the competitors with factor loadings of 0.898 and 0.823 respectively, while the least loaded on item on *Marketing practices* factor is Lack of promotional activities with lowest factor loading i.e. 0.555. Total numbers of items loaded on the factor of Marketing practices are eleven which explained a total variance of 23.012 in the total variance explained by six factors extracted from factor analysis. The value of Cronbach alpha for this factor is found to be 0.834, which is above 0.70. Any value of Cronbach Alpha which is above 0.70 is considered as a good value and thus, reliable. It can be interpreted

from the mean values of all the items under *Marketing practices* factor that highest mean value is 4.52 which is of Insufficient funds for marketing activities followed by Lack of product innovations with a mean value of 0.445. It shows that lack of product innovations and funds for marketing activities are the major problem areas related to marketing practices in footwear companies of India. Innovative practices in production, variety of products according to the changing needs, preferences, and tracking tastes of the customers are the core practices for branding. Indian footwear companies are lagging in these marketing practices, very few efforts are being done for promotions of products at national or global level. Companies do not have sufficient funds to invest on marketing activities, or to identify innovative practices, methods for promotion. Due to the lack of skilled and talented labour, marketing innovations are rare in Indian footwear companies. Indian footwear companies are lagging behind in almost all the marketing activities that are essential to establish a global brand. Most Indian footwear companies have failed to establish themselves as brands in national market as well. For the successful branding, the product of the company should be of quality, with unique features or attributes, distinguishable from other products or substitutes, and this requires huge efforts from the company on marketing, promotion, market research, and public relations activities. All these activities are lacking as far as Indian manufacturers are concerned, hence factors categorised as Marketing practices are significant impediments establishing Indian brands as global brands.

2. Problem related to Human Resources: Table 2 shows the Cronbach Alpha of the factor i.e. Human resources, items which are represented by this factor along with the factor loadings.

Table 2: Problems related to Human Resources

Cronbach Alpha = 0.892, Variance = 21.216		
Particulars	Factor Loadings	Mean Value
Lack of Training programs	0.723	4.02
Fewer Learning resources	0.701	3.14
Inflexible working schedules	0.669	4.00
No Training for automation	0.621	3.21
Job dissatisfaction	0.611	4.24

Lack of multi-skilled employees	0.601	4.21
High employee turnover	0.589	4.21
Ineffective communication systems	0.443	3.01
Poor work culture	0.414	3.12

Interpretation: It can be interpreted from the table 2 that the highest loaded item on the Human resources factor is Lack of training programs followed by less learning resources with factor loadings of 0.723 and 0.701 respectively, while the least loaded on item on Human resources factor is Poor working culture with lowest factor loading i.e. 0.414. Total number of items loaded on the factor of Human Resources are nine which explain a total variance of 21.216 % in the total variance explained by six factors extracted from factor analysis. The value of Cronbach alpha for this factor is found to be 0.892, which is above 0.70. Any value of Cronbach Alpha which is above 0.70 is considered as a good value and thus, reliable. It can be interpreted from the mean values of all the items under human resource factor that highest mean value is 4.24 which is of job dissatisfaction. It shows that job dissatisfaction among employees working in footwear companies of India is the major problem area related to human resources. Employees are highly dissatisfied towards their job which leads to poor service quality, high employee turnover, increasing rate of absenteeism, huge cost on recruitment & selection, less organizational commitment and low productivity. Lack of multi-skilled or multi-talented employees is another major problem of Indian footwear companies, there are few provisions for regular training programs, lack of career development opportunities which leads to job dissatisfaction, inefficient and ineffective performance and overall poor organizational performance. There is a lack of training facilities to the employees regarding the new automation processes, which not only results in to high work place accidents but also high wastage or damage cost to the company. Human resources are the main assets of the company and quality of services provide by employees is directly affected by the knowledge, skill of employees, employee engagement, commitment towards their work, and their level of satisfaction. Any company can set itself as a brand in the market on the basis of its product & services quality, features, performance, customers' services or corporate image in the market, but these major problems related to human resources detrimental to the overall competitiveness of Indian footwear manufacturers

3. **Problem related to Functions and processes:** Table 3 shows the Cronbach Alpha of the factor i.e. Functions and processes, items which are represented by this factor along with the factor loadings.

Table 3: Problems related to Functions and processes

Cronbach Alpha = 0.811, Variance = 17.102		
Particulars	Factor Loadings	Mean Value
Inadequate working capital	0.877	0.400
Low labour productivity	0.803	0.415
High Product cost structure	0.799	0.442
Lack of IT enabled processes	0.778	0.423
Material wastage	0.723	0.301
Delay in order processing	0.704	0.398
Ineffective customer services	0.698	0.438
Inventory cost for outdated products	0.556	0.312

Interpretation: It can be interpreted from the table 3 that the highest loaded item on the *Functions and Processes* factor is Inadequate working capital followed by Low labour productivity with factor loadings of 0.877 and 0.803 respectively, while the least loaded on item on Functions and processes factor is Inventory cost for outdated products with lowest factor loading i.e. 0.556. Total number of items loaded on the factor of Functions and processes is eight which explains a total variance of 17.102 in the total variance explained by six factors extracted from factor analysis.

The value of Cronbach alpha for this factor is found to be 0.811, which is above 0.70. Any value of Cronbach Alpha which is above 0.70 is considered as a good value and thus, reliable. It can be interpreted from the mean values of all the items under Functions and processes factor that highest mean value is 4.42 which is of High product cost structure followed by Ineffective customer services with a mean value of 4.38. It shows that cost is main problem in footwear companies of India due to poor technology, low productivity, inefficient production planning, delay in order processing, lack of automation, huge wastage, and insufficient working capital. Any company can project itself as a global brand in the market on the basis

of its function or processes by offering products with unique features, high quality customer services, or on the basis of low pricing by managing its cost structure, but these major problems related to Functions and processes affect the Indian footwear companies' ability to build world class brands adversely . Indian footwear companies are not able to manage the costs, not able to provide high quality customer services, and productivity is also low, which further adds to the per unit cost, thus all the factors are adversely affecting Indian footwear companies' ability to build global brands.

4. Problem related to Facilities for Manufacturing:

Table 4 shows the Cronbach Alpha of the factor i.e. Facilities for Manufacturing, items which are represented by this factor along with the factor loadings.

Table 4: Problems related to Facilities for Manufacturing

Cronbach Alpha = 0.792, Variance = 13.101		
Particulars	Factor Loadings	Mean Value
Ineffective planning for manufacturing schedules	0.887	0.334
Mismanagement of available resources	0.821	0.412
Unavailability of raw material	0.768	0.343
High cost of imported raw material	0.612	0.332
Less focus on product design and manufacturing process	0.519	0.443
No focus on designing footwear to serve the intended purpose	0.432	0.452

Interpretation: It can be interpreted from the table 4 that the highest loaded item on the Facilities for Manufacturing factor is Ineffective planning for manufacturing schedules followed by Mismanagement of available resources with factor loadings of 0.887 and 0.821 respectively, while the least loaded on item on Facilities for Manufacturing factor is No focus on designing footwear to serve the intended purpose factor loading i.e. 0.432. Total number of items loaded on the factor of Facilities for Manufacturing is six which explains a total variance of 13.101 in the total variance explained by six factors extracted from factor

analysis. The value of Cronbach alpha for this factor is found to be 0.792, which is above 0.70. Any value of Cronbach Alpha which is above 0.70 is considered as a good value and thus, thus the factor is found to be reliable. It can be interpreted from the mean values of all the items under Facilities for Manufacturing factor that the highest mean value is 4.52 which is of *No focus on designing footwear to serve the intended purpose* followed by *Less focus on product design and manufacturing process* with a mean value of 4.43. It shows that Indian footwear companies are not producing the goods as per the needs of the customers, most of their manufacturing practices are standardised in nature, they are not targeting the niche segments of the customers, such as; sport shoes for athletes, shoes for jogging, racing shoes, shoes for pregnant women, etc. These are the reasons that the products fail to serve the intended purpose and customers do not have a high preference for Indian footwear. Unavailability of raw material or costly imported raw material increases the cost of the products and companies are unable to position themselves on the basis of attractive pricing, or best quality raw material. All these major problems related to Facilities for Manufacturing contribute to factors that prevent Indian footwear companies from creating global footwear brands.

5. Problem related to Supply chain management: Table 5 shows the Cronbach Alpha of the factor i.e. Supply chain management, items which are represented by this factor along with the factor loadings.

Table 5: Problems related to Supply chain management

Cronbach Alpha = 0.866, Variance = 9.234		
Particulars	Factor Loadings	Mean Value
Lack of concern on-time delivery and post delivery services	0.756	4.45
Small network of suppliers or distribution system	0.711	4.12
High margin by distributors or retail stores	0.665	3.01
Customers are not the part of supply chain	0.512	4.41
Less involvement of suppliers in material planning and distribution strategy	0.404	4.23

Interpretation: It can be interpreted from the table 5 that the highest loaded item on the *Supply chain management* factor is Less concern towards on-time delivery and post delivery services followed by Small network of suppliers or distribution system with factor loadings of 0.756 and 0.711 respectively, while the least loaded on item on Supply chain management factor is Less involvement of suppliers in material planning and the factor distribution strategy has lowest factor loading i.e. 0.404. The Total number of items which loaded on the factor of *Supply chain management* is five which explain a total variance of 9.234 in the total variance explained by six factors extracted from factor analysis.

The value of Cronbach alpha for this factor is found to be 0.866, which is above 0.70. Any value of Cronbach Alpha which is above 0.70 is considered as a good value and thus, the factor can be considered reliable.

It can be interpreted from the mean values of all the items under *Supply chain management* factor that highest mean value is 4.45 which is of *LeLack* of concern on-time delivery and post delivery services. It shows that delivery is the major problem in footwear companies of India related to Supply chain management. Companies have small network or distribution system and they are not able to distribute the products on time, have to bear the stock out costs, or loss of goodwill in the market. High margin charged by the retailers or distributors make the products very costly for the final customers and that again affects the overall sale of the companies. Distribution plays a big role in brand establishment. Offering products at different outlets, close to the customers, on time and according to the need of the customers, at reasonable prices with best post delivery services can help the Indian footwear companies create global footwear brands.

6. Problem related to Safety & Environmental concern: Table 6 shows the Cronbach Alpha of the factor i.e. Safety & Environmental concern, items which are represented by this factor along with the factor loadings.

Table 6: Problems related to Safety & Environmental concern

Cronbach Alpha = 0.822, Variance = 7.269		
Particulars	Factor Loadings	Mean Value
Lack of total quality management practices in	0.668	4.23

the company		
Less concern towards environment	0.613	4.45
Lack of green practices in waste disposal, advertising, and packaging	0.559	4.12
Lack of industrial safety standards to reduce the workplace accidents	0.404	4.02

Interpretation: It can be interpreted from the table 6 that the highest loaded item on *the Safety & Environmental concerns* factor is *Lack of total quality management practices* in the company followed by *Less concern towards environment* with factor loadings of 0.668 and 0.613 respectively, while the least loaded on item on *Safety & Environmental concerns* factor is *Lack of industrial safety standards to reduce the workplace accidents* with lowest factor loading i.e. 0.404. Total number of items loaded on the factor of Safety & Environmental concerns four which explain a total variance of 7.269 in the total variance explained by six factors extracted from factor analysis.

The value of Cronbach alpha for this factor is found to be 0.822, which is above 0.70. Any value of Cronbach Alpha which is above 0.70 is considered as a good value and thus, the factor is found to be reliable. It can be interpreted from the mean values of all the items under *Safety & Environmental concerns* factor that highest mean value is 4.45 which is of less concern towards environment. It shows that lack of concern towards the environment and stakeholders by the footwear companies of India is the major problem area.

In the current era of green marketing, customers are becoming aware about the eco-friendly products, green practices of the company can help enhance the corporate image of a company and can also help in attracting customer segments who are concerned for environment. Companies which follow green practices, offer recyclable products, or packaging materials are preferred by the customers. Green practices also improves their overall corporate image which leads to building a successful brand.

Null Hypothesis:

There is no difference in the opinions of the employees of five selected footwear companies related to the problems in establishing India as a global footwear brand.

Researcher has used the KruskalWalis test to measure the difference in the opinions of the employees of five selected footwear companies related to the problems in establishing India as a global footwear brand. Results of the test are given below.

Table 7: Results of KruskalWalis Test

S.No.	Particulars	Test value	p-value	Hypothesis
1	Problems related to Marketing Practices	9.246	0.121	Accepted
2	Problems related to Human Resources	6.847	0.225	Accepted
3	Problems related to Functions and Processes	2.122	0.473	Accepted
4	Problems related to Facilities for Manufacturing	9.421	0.082	Accepted
5	Problems related to Supply chain management	3.982	0.321	Accepted
6	Problems related to Safety & Environmental concerns	7.632	0.092	Accepted

Interpretation: It can be interpreted from the table 7 that the value of KruskalWalis test for all the six factors are found to be insignificant and it can be said that there is no significant difference in the opinions of the employees of different footwear companies related to the problems in establishing Indian footwear brands as global footwear brands. Personnel from all various companies have same opinions, thus it can be said that these are indeed the major six factors which need to worked upon to establish Indian footwear companies as global brands.. On the basis of variance explained by each of the six factors, it can be said that the chief area of improvement is *marketing practices* followed by *human resources* and the area with the least impact from a branding perspective is *Safety and environmental Concerns*.

Conclusion

It can be concluded from the study that there are mainly six factors which that are significantly affecting the ability of Indian footwear companies to create global footwear brands. These six factors/problems are mainly related to the- marketing practices, human

resource management, functions and processes, supply chain management, facilities for manufacturing and safety & environmental concerns.

Among these six factors, Marketing practices require most attention. It was also found from the study that senior personnel from all the five companies share the same opinions towards the problems facing the Indian footwear sector. Thus, overall it can be said that Indian footwear companies need to work upon these six major problems identified in the paper to begin creating global footwear brands. Excellent Marketing practices essential for the success of a brand. Companies need to focus on innovative marketing activities, maintain active presence on social media websites, create promotional offers for customers, focus on niche segments, try to improve the quality of products, create uniform pricing for all distributors, impose strict regulations at setting high margin by retailers, improve manufacturing processes by adopting automation, provide quality training to employees, hire experts of designing, and maintain proper provisions for safety of employees at workplace, and adopt eco-friendly methods for manufacturing, waste disposal, advertising and packaging of products.

Recommendations

In view of the results of the study, the following observations and recommendations can be made

1. Footwear Industry in India has been “production oriented” , and the focus of the entrepreneurs has been on manufacturing and production
2. Lack of skilled labour, and lack of adoption of new technologies has put India at a disadvantage when compared to China in footwear manufacturing and production
3. The footwear brands in India have failed to focus on the marketing aspects of their businesses – and have been unable to create global brands in this domain
4. Part of this marketing failure , can be inadequate fund deployment, but the more significant is the lack of systematised knowledge in business management
5. Employees, managers, and in some cases even promoters themselves have no formal background in business management and entrepreneurship. This makes them ill prepared to handle challenges of scaling up like logistics management, supply chain management and brand management. Trained business managers often do not opt for work in the footwear sector due to the poor positioning and general lack of awareness
6. There is urgent need for focused business management training for existing employees in the footwear industry

7. This is a glaring need for systematic entrepreneurship development in the sector to create high quality entrepreneurs who have undergone systematic education in all aspects of setting up, and scaling up a business enterprise in the footwear domain.

Limitations and Future Scope

The study is based on the primary data and primary data always has a limitation that it suffers from human judgement which may or may not be consistent. Sample size of the study is small and the study is limited to only top five companies of footwear industry. In future, similar studies can be conducted by taking larger sample sizes. A comparative study can be done for domestic and international footwear companies.

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