



# Consulate General of India Frankfurt

## Scope for Indo-German partnership in Leather Industry

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**Foreword:**

I am delighted to present an in house study 'Indo-German Partnership in Leather Industry'. India and Germany have a strategic partnership since 2001, which sets out potential areas for intensifying bilateral cooperation, among others, in the business and energy sectors as well as in science, technology, agriculture and defence. Germany is India's largest trading partner in the European Union and one of the leading sources of Foreign Direct Investment. At present, there are over 1,700 German companies and 600 JVs in India. It is against this background that a need was felt to identify different areas and sectors and provide substantial information for cooperation and collaboration to Indian and German traders and entrepreneurs.

The Consulate has been actively organizing several events and seminars to promote trade and investment between India and Germany. We have also been supporting various business councils for the participation in the trade fairs that are taking place within the jurisdiction of the post. We observed that there is lot of interest in the leather industry on both sides. There is tremendous further potential in the sector. Our economic partnership in the leather industry is still below its full potential.

The objective of this report is to give an idea of potential opportunities in the leather trade between India and Germany. This report gives information about the Indian and German leather industries including initiatives by the respective Governments. The various investment opportunities available in both the markets are discussed. Also, details about various agencies which help in promoting leather trade in both the countries are given. The Report seeks to provide a capsule of information that might be useful to Indian and German businesses looking at engaging in the leather sector.

The Consulate always strives to strengthen economic and commercial cooperation between India and Germany by spreading information and extending support to Indian and German businesses. You are encouraged to send your economic and commercial queries and inputs to our commercial wing at the following email ids:

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**(Pratibha Parkar)**  
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## The Leather Industry: Background

Amongst the few materials which have been used by mankind since primitive times, leather has shown a marked continuity. Leather artefacts have been in use since 2200 BC. It has always occupied a special place in Indian culture and Indian economy.

The usage of leather in India dates back almost 5000 years ago. Leather has been used in India for a variety of purposes like comfort, protection, luxury, etc. The first recorded evidence of usage of leather can be found in the scriptures of the Vedas. As per Rigveda, “Mashaks”, which were water sacks made of leather, were used in 3000 BC. The explorer, Marco Polo, also has mentioned the usage of leather in India in the 1800s in his accounts. He mentioned about the Gujarat’s leather trade and how it carried out the leather trade through the Silk Route. Uttar Pradesh occupies a special place in Indian leather industry, because of its world famous “*Joothis*”, a type of footwear. These “*Joothis*” have a history of being used by various Mughal kings and other elites of the Mughal court. In the south too, leather was one of the important items of trade between South Indian states and the Greek and Roman kingdoms of Europe.

Initially, India had served as the major exporter of the raw materials of the leather industry. In the past few decades, Indian leather industry has undergone a drastic change from being an exporter of raw materials in the 60’s and 70’s to exporter of various finished and fashionable leather goods. After the liberalization of the Indian economy in 1991, Indian leather industry has successfully made use of the opportunities available in the global market and now is one of the highest contributors to the Indian export income. Germany is one of the major importers of the Indian leather and various leather products. Germany is a huge potential market for Indian leather goods, due to various reasons including an increase in the number of working professionals and a flourishing fashion industry.

Leather is one such commodity, which is widely traded across the globe. Broad range of products is produced by the leather industry. Some of the key products are footwear, bags, garments, etc. Fashion industry, furniture and interior design industries, as well as the automotive industry are the key drivers of the leather industry.

The raw material for the leather processing is derived from slaughter houses and waste from the meat industry. The most leather is made of cattle hides, which amount to about 65% of all leather produced. The other hides which are used are that of sheep, goats and pigs. The hides from Sheep are about 13%, from goats are about 11% and from pigs are about 10%. The raw material is then processed and converted into usable leather in tanneries.

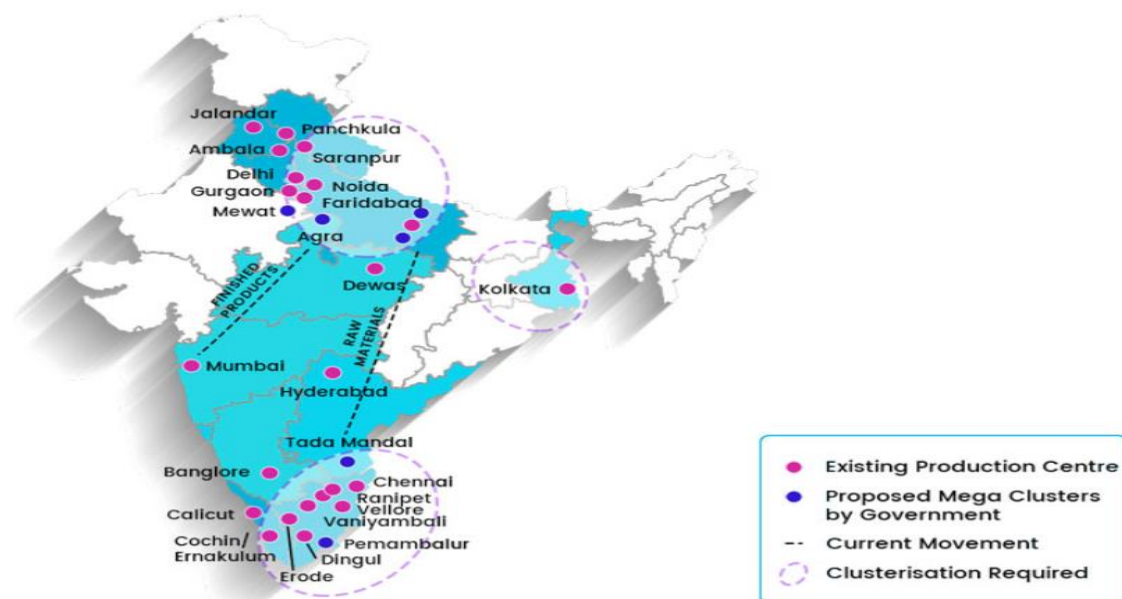
## The Indian Leather Industry:

The leather industry is one of the key industries in the Indian economy. Indian leather sector is known for its consistency in high export earnings and it is among the top ten foreign exchange earners. The Indian leather industry accounts for around **12.93** per cent of the world's leather production of hides/skins. India has abundant raw materials. India is home to **20%** of world cattle & buffalo and **11%** of world goat & sheep population. In addition to the availability of raw materials, the skilled workforce, innovative technology, and increased industry compliance to international standards have made the Indian leather industry an attractive investment option.

India is the **second largest producer** of the footwear, the **second largest exporter** of leather garments and **third largest exporter** of Saddlery & Harness in the world.

The major production centres for footwear, leather and leather products in India are located in the states of Tamil Nadu, West Bengal, Uttar Pradesh, Maharashtra, Punjab, Karnataka, Haryana, Madhya Pradesh, Kerala, and Rajasthan.

### Indian leather production centres:



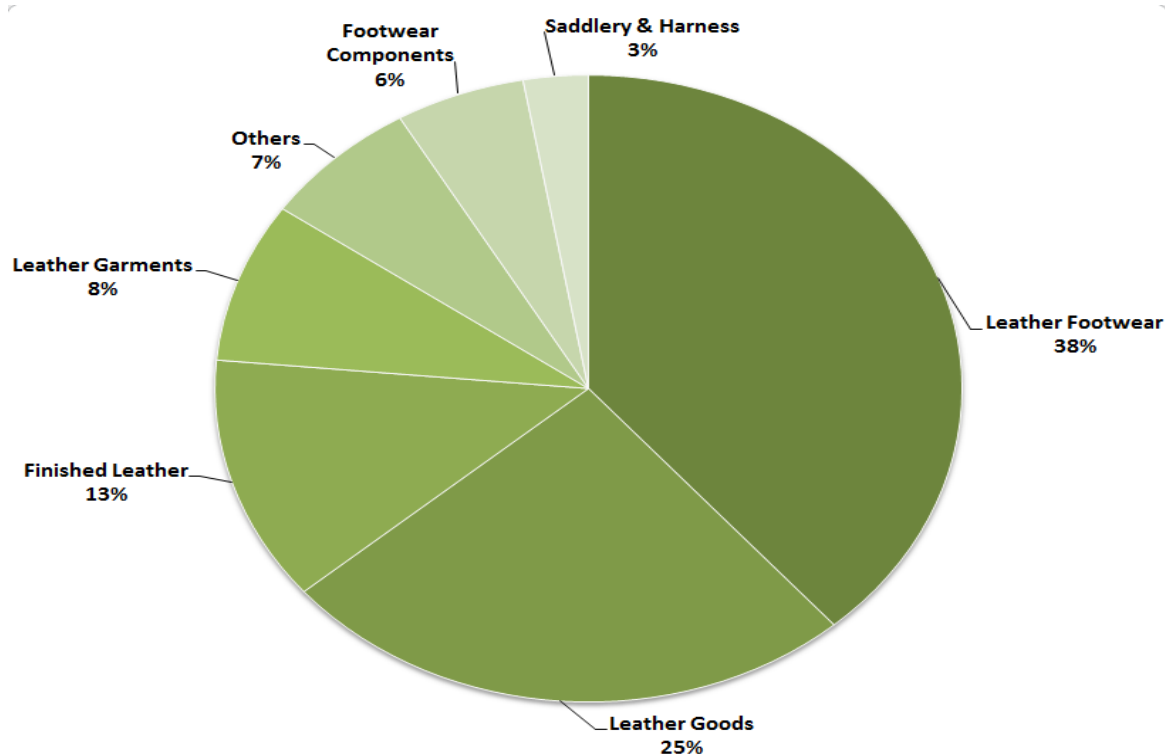
Source : <https://www.fdi.finance/sectors/leather>

The Leather industry in India stands at USD 17.85 billion of which Exports are USD 5.85 billion and Domestic market consumption is USD 12 billion as of January 2019. India's total leather exports in FY2018-2019 amounted to a total of USD 5.7 billion.

The break-up of leather exports value in FY2018-2019 is as follows:

Product	Value(USD billion)
Finished Leather	0.72
Leather Footwear	2.2
Footwear Components	.32
Leather Garments	.47
Leather Goods	1.44
Saddlery & Harness	.16
Others	.39
Total	5.7

**Percentage break-up of total leather exports from India:**



Source: leatherindia.org

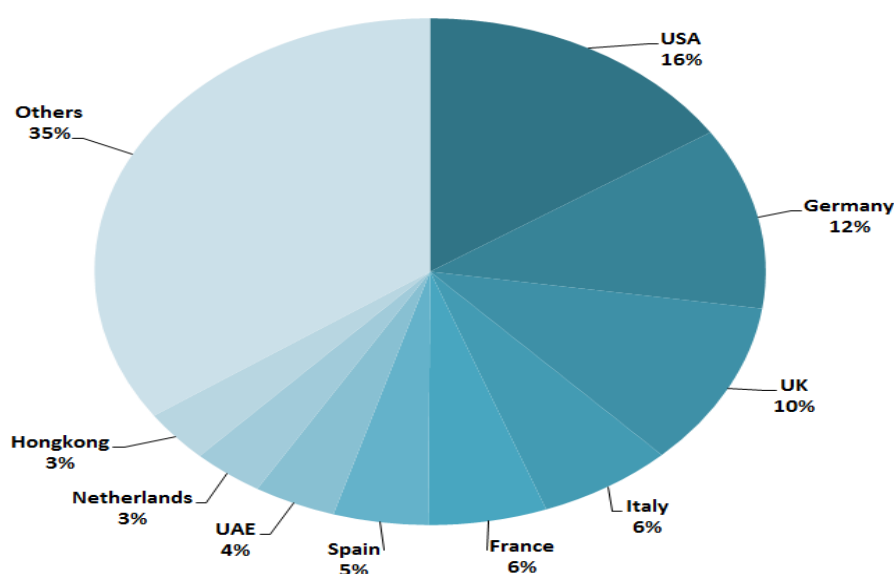


The major markets for Indian leather & leather products are USA, Germany, UK, Italy, France, Spain, UAE, Netherlands, Hong Kong, China, Poland and Belgium. These countries together account for about 71.8% of India's total leather exports. European Union accounts for 54% of India's total export of leather and leather products. Germany is the second largest importer of the Indian leather and leather goods. Around 12% of the total leather exports of India are to Germany.

Amount of Indian leather exports sent to various countries is as follows:

Country	Value(USD billion)
USA	.9
Germany	.65
UK	.6
Italy	.37
France	.33
Spain	.26
UAE	.22
Netherlands	.20
Hong Kong	.20
Others	1.97
Total	5.7

Importer's share of Indian leather exports



Source: leatherindia.org

## Investment opportunities in India:

The high growth potential for exports, the ready availability and abundance of raw materials, increased focus on skill development, capacity modernisation and expansion, and favourable government policies have made Indian leather industry attractive for investments.

Exports are projected to reach USD 9 Bn by end of 2020, which stand at USD 5.85 as of Jan-19. The Domestic market is expected to reach USD 18 Bn by end of 2020, which stand at USD 12 Bn as of January 2019. India is currently negotiating a free trade agreement with European Union.

### FDI Policy:

- India allows **100% FDI through automatic route** for manufacturing leather products in India. Under the Automatic route, the non-resident investor or the Indian company does not require any approval from Government of India for the investment.
- The Government of India allows **100% FDI in single-brand retailing** in India, with a clause of 30% mandatory local sourcing
- The leather industry in India is de-licensed

### Government incentives:

Few incentives given by the Indian government to promote the Indian leather industry are:

- GST concessions are given for various leather items:-
  - GST for finished leather has been reduced from 12% to 5%
  - GST on certain leather chemicals, leather goods, leather garments and saddlery items has been reduced from 28% to 18%
  - GST on Common Effluent Treatment Plants(CETPs) has been reduced from 18% to 12%
  - GST on footwear has been reduced from 18% to 5%
- Under a sub-scheme of **Indian Leather Development Programme (ILDPP)**, assistance up to 50% of the project cost with a ceiling of USD 7.69 million, for upgradation /installation of Common Effluent Treatment Plants (CETPs) is provided

- Under **Integrated Development of Leather Sector (IDLS)** , **sub-scheme** of ILDP, 30% grant is provided on the cost of plant and machinery for Micro and Small units and 20% for other units, with a ceiling of USD 0.307 million for each product line
- Under **Mega Leather Cluster (MLC)**, **sub-scheme** of ILDP, 50% grant with a ceiling of USD 19.23 million based on size is provided
- **Mega Leather, Footwear and Accessories Cluster (MLFAC)** scheme provides infrastructure support to the leather, footwear and accessories sector. Graded assistance is provided up to 50% of the eligible project cost, excluding cost of land with Government assistance being limited to USD 19 million.

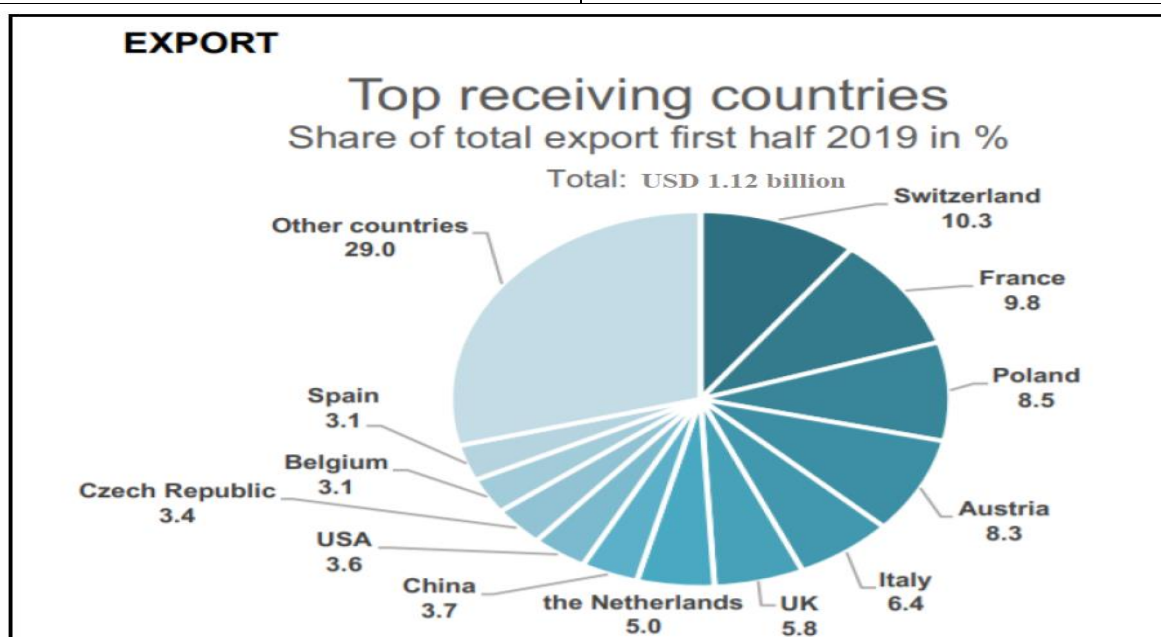
## The German Leather Industry:

Germany is the third largest leather producer in Europe. The German leather industry has over 100 leather manufacturers. The industry turnover is around USD 555 million. 70% of the sales revenue is generated from the foreign countries. Primary sectors in which leather is widely used are of cars, furniture, high quality shoes, bags and saddlery. From the surface leather produced in Germany, 75% of them are processed by the customers in the automotive and furniture sectors, 15% in the footwear sector, and 10% to produce high-quality leather goods and equestrian items.

In the first half of 2019, Germany exported leather goods and luggage for a value of around USD 1.12 billion. In the same period last year, the value of exports totalled USD 1.09 billion. The important buyers were Switzerland, France and Poland.

The break-up of German leather exports to various countries is as follows:

Country	Value (USD billion)
Switzerland	0.12
France	0.11
Poland	0.095
Austria	0.093
Italy	0.072
Others	0.63
Total	1.12

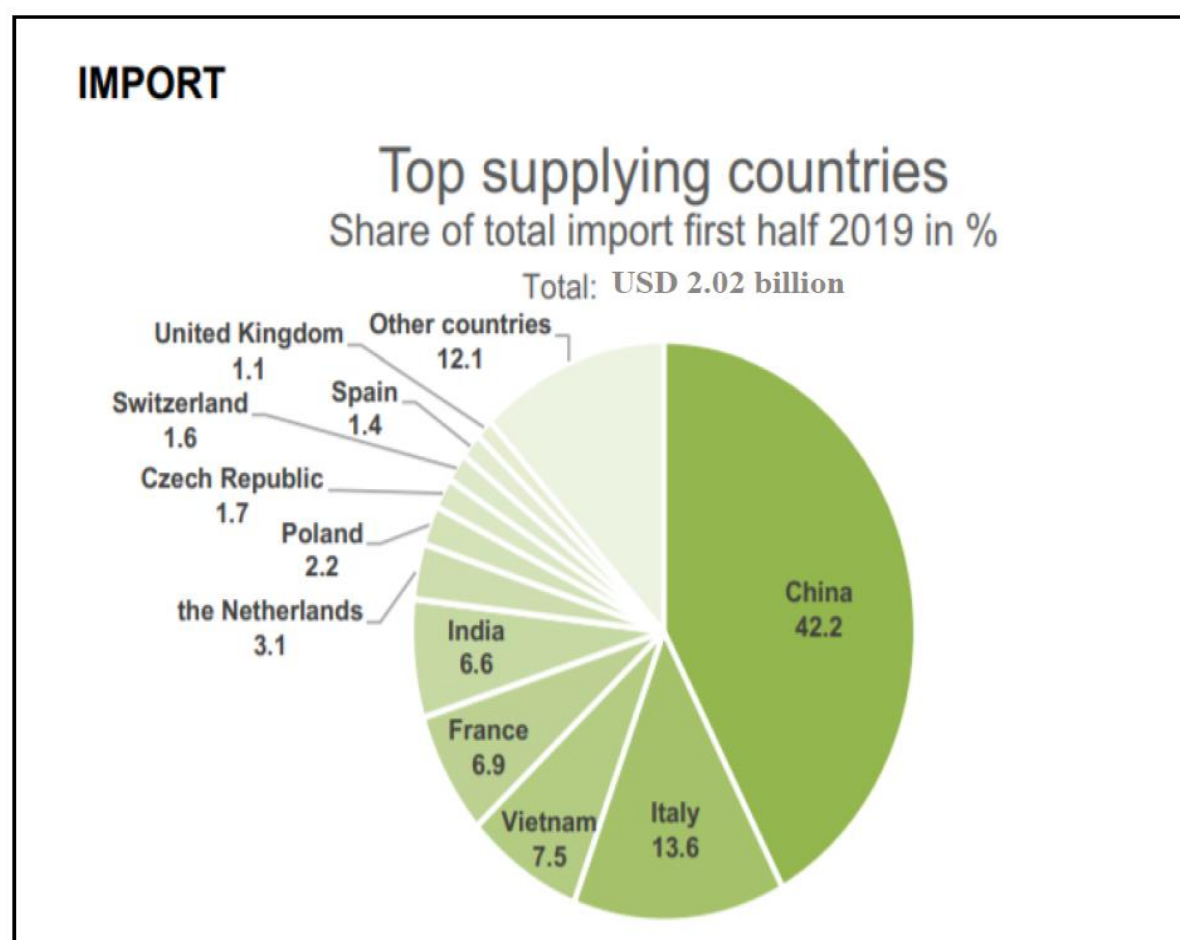


Source:hdsi.eu

In the first half of 2019, Germany imported leather goods and luggage for a value of around USD 2.02 billion. In the same period last year, the value of exports totalled USD 1.91 billion. The important exporters were China, Italy, Vietnam, France and India.

The break-up of German leather imports from various countries is as follows:

Country	Value (USD billion)
China	0.85
Italy	0.27
Vietnam	0.15
France	0.14
India	0.13
Others	0.48
Total	2.02



Source: hdsi.eu

## **Legislative measures in the German leather industry:**

European Union plays a key role in the global leather market. The processes adopted and the products produced are varied in nature. The European commission promotes innovation and competitiveness in the leather industry and at the same time, also makes efforts to protect the consumer health and the environment.

Various measures taken by the EU regarding the conservation of environment, the use of chemicals, the marketing and use of dangerous substances, and the use of animal by-products, affect the leather industry in Germany.

Few EU regulations which have implications for the leather industry in Germany are:

### **REACH (Registration, Evaluation, Authorisation and Restriction of Chemicals):**

REACH is a European legislation, which has come into force in 2007. REACH replaced the former legislative framework for chemicals in the EU. REACH shifts the responsibility from public authorities to industry with regards to assessing and managing the risks posed by chemicals and providing appropriate safety information for their users. It requires new forms of cooperation among companies, enhancing communication along the supply chain, as well as developing tools to guide and assist companies and public authorities in its implementation.

The main aims of REACH are to ensure a high level of protection for human health and the environment, including the promotion of alternative test methods, as well as the free circulation of substances on the internal market and the enhancement of competitiveness and innovation.

The European Commission plays a key role in implementing REACH legislation. It plays a significant role in the authorisation process of the substances. It works closely with the European Chemicals Agency (ECHA) and national authorities in the implementation of the REACH regulation. The Commission also provides advice on key issues related to the interpretation of REACH and supports ECHA in various tasks.

### The Industrial Emissions Directive (IED):

The Leather industry involves variety of industrial production processes. These processes lead to emissions of air pollutants, waste water discharge and the generation of waste. The IED was adopted on 24 November 2010. The IED entered into force on 6 January 2011 and had to be transposed by Member States of the European Union by 7 January 2013.

The IED aims to achieve a high level of protection of human health and the environment taken as a whole by reducing harmful industrial emissions across the EU, in particular through better application of Best Available Techniques (BAT).

The IED is based on several pillars, in particular (1) an integrated approach, (2) use of best available techniques, (3) flexibility, (4) inspections and (5) public participation.

- (1) The Integrated approach: According to this, the permits must take into account the whole environmental performance of the plant, covering e.g. emissions to air, water and land, generation of waste, use of raw materials, energy efficiency, noise, prevention of accidents, and restoration of the site upon closure.
- (2) The permit conditions including emission limit values must be based on the **Best Available Techniques (BAT)**. In order to define BAT and the BAT-associated environmental performance at EU level, the Commission organises an exchange of information with experts from Member States, industry and environmental organisations.
- (3) The IED allows competent authorities some **flexibility** to set less strict emission limit values. This is possible only in specific cases where an assessment shows that achieving the emission levels associated with BAT described in the BAT conclusions would lead to disproportionately higher costs compared to the environmental benefits due to the geographical location or the local environmental conditions or the technical characteristics of the installation. The competent authority shall always document its justification for granting such derogations.
- (4) The IED contains mandatory requirements on **environmental inspections**. Member States shall set up a system of environmental

inspections and draw up inspection plans accordingly. The IED requires a site visit to take place at least every 1 to 3 years, using risk-based criteria.

- (5) The IED ensures that the **public has a right to participate** in the decision-making process, and to be informed of its consequences, by having access to permit applications, permits and the results of the monitoring of releases.



**Opportunities for Indo-German cooperation:**

The Leather industry has a prominent place in the Indian economy owing to its high earnings and huge potential. India is one of the largest exporters of various leather goods. Germany is the second largest importer of Indian leather exports, contributing to around 12% of the total Indian leather exports.

Indian leather exports are expected to reach USD billion by end of 2020 from the level of USD 5.85 billion (as of January 2019). The increased number of working professionals in Germany is one of the key factors driving the fashion industry in Germany. Leather goods play a key role in the fashion industry and hence, there is an increased demand for leather goods in Germany. The German leather industry has witnessed growth in imports and exports of various leather goods in the first half of 2019.

Indian domestic market is an attractive investment option. The Indian domestic market is expected to reach USD 18 billion by end of 2020, which stands at USD 12 billion as of January 2019. The Government of India has identified the leather sectors as a focus sector in the Indian Foreign Trade Policy. Accordingly, the Government is also implementing various Special Focus Initiatives under the Foreign Trade Policy for the growth of leather sector.

Indian government has allowed for 100% FDI through automatic route in the leather products manufacturing. With the easier government norms, high abundance of raw materials, skilled labour, advanced technologies, and huge untapped potential, India provides huge opportunities for investments.

**Key agencies in Germany:****HDS/L (The Federal Association of the German Footwear and Leather Goods Industry):**

HDS/L represents the manufacturing companies in the shoe and leather goods industry. The HDS/L actively advocates the business interests of its members towards political institutions and the public sphere. It supports its members in the fields of labour and collective bargaining law, fashion, press and public relations, sales promotion and marketing, education and training and participation in fairs and exhibitions.

HDS/L can be contacted at <https://www.hdsl.eu/Home-en>

**VDL ( Verband der Deutschen Lederindustrie):**

The Verband der Deutschen Lederindustrie (German Leather Federation) (VDL) considers itself a service provider for the entire leather sector. Protecting and representing the economic and political interests of leather producers is their primary mission.

Few of the services they provide are:

- Provide information on industry statistics and market data, and environmental and consumer protection
- Trade fair management
- Contact for upstream and downstream economic sectors

VDL can be contacted at <https://vdl-web.de/en/>

## **Key agencies in India:**

### **Council for Leather Exports (CLE):**

The Council for Leather Exports (popularly known as CLE) set up in July 1984, is an autonomous non-profit company registered under the Indian Companies Act, 1956 entrusted with export promotion activities and development of the Indian leather industry.

CLE functions under the aegis of the Ministry of Commerce and Industry, Government of India. CLE assists its members in extending their global reach thereby increasing their exports. CLE caters to the needs of the leather exporters and serves as a connecting bridge between Indian leather exporters and buyers all over the world.

### **Central Leather Research Institute (CLRI):**

Central Leather Research Institute, India was founded on 24 April, 1948. CLRI was founded to develop an internal strength in the country to generate, assimilate and innovate technologies for leather sector. CLRI in 1948, made an initiative with foresight to link technology system with both academy and industry. CLRI assumed the role of being a part of the University of Madras in imparting education in leather technology. CLRI has been closely associated with many International Organisations like UNIDO; FAO; UNDP; TNO (The Netherlands); the British Leather Confederation (BLC), UK; CTC, France; CESECA, Italy; IRDLAI, Indonesia; SATRA, UK and IDRC, Canada, CSID, Australia, University of Amsterdam.

### **Footwear Design and Development Institute (FDDI):**

Footwear Design and Development Institute was established in 1986, under the Ministry of Commerce & Industry, Government of India. The main objectives of FDDI are to develop skilled human resources to promote the rapid growth of the footwear industry, to develop appropriate infrastructure for the Indian footwear industry to enable it attain international standards of production, and to particularly promote the growth of export production of quality footwear and allied products from the country.

**Trade fairs in Germany:****India Leather Days:**

The India leather days is a trade fair organized by the Council for Leather Exports (CLE) in Germany. Various Indian traders exhibit a wide variety of leather goods and accessories.

The 8<sup>th</sup> edition of the India Leather Days has taken place on 27<sup>th</sup> November 2019 – 28<sup>th</sup> November 2019 in Messe- Offenbach am Main. 49 exhibitors from India displayed their products at the India Leather Days, 2019.

**The ILM International Leather Goods Fair:**

The ILM trade fair takes place twice in a year in Offenbach am Main. The first fair in the year takes place in February/March for Autumn/Winter season collections. The second fair takes place in August/September for Spring/Summer season collections.

<https://www.ilm-offenbach.de/>

**The Gallery Shoes:**

The gallery SHOES is an international trade fair for shoes and accessories. The trade fair takes place twice in a year: once in March and once in August/September.

<https://gallery-shoes.com/>

**Consulate Activities:**

India is one of the largest exporters of the leather and the leather goods. German is the second largest importer of Indian leather goods, contributing to 12% of the total Indian exports. To further strengthen this trade, Consulate General of India has always extended support to the Indian leather industry. In 2019 the following events were organized.

**The Indian Leather Show 2019:**

Consulate General of India, Frankfurt in coordination with the Council for Leather Exports (CLE) and M/s Prexma Limited organized the India Leather Show in Düsseldorf/Neuss from 19<sup>th</sup> to 20<sup>th</sup> Feb 2019. It is a sourcing event with an objective to enhance Indian leather exports to Germany. The event saw participation from 38 Indian companies specialized in leather footwear, leather goods and accessories, and leather garments. The Indian Leather Show in 2019 is the first edition of the sourcing event.

**The India Leather Days 2019:**

The 8th edition of the India Leather Days was held on 27th and 28th Nov 2019 in Messe, Offenbach am Main. It is a buyer-seller meet organized by the Consulate General of India, Frankfurt and the Council for Leather Exports (CLE). The two-day trade fair saw participation from 49 Indian exporters, who exhibited various leather goods. For the opening ceremony of the India Leather Days 2019, a Fashion Show was organized by Consulate General of India, Frankfurt. Young Indian girls and boys displayed various Indian leather products of the exhibitors to the audience.

## THE INDIA LEATHER DAYS 2019

The 8<sup>th</sup> edition The India Leather Days was organized by CGI, Frankfurt on 27<sup>th</sup> and 28<sup>th</sup> Nov 2019 in Offenbach am Main. Consul General Ms. Pratibha Parkar inaugurated the event.





## THE INDIAN LEATHER SHOW 2019

The first edition of the Indian Leather Show was organized by CGI, Frankfurt on 19<sup>th</sup> and 20<sup>th</sup> Feb 2019 in Düsseldorf/Neuss. Consul Ms. Ruby Jaspreet inaugurated the event.



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**Major Indian companies in the leather industry:**

COMPANY	DESCRIPTION	HEADQAUERTERS
TATA INTERNATIONAL	<p>Tata International is a leading exporter of finished leather and leather products. They are a significant global player in goat leather and are the only tannery in India producing cow patent leather, that are used in the footwear, apparel, gloving, leather goods, automotive and furniture industries.</p> <ul style="list-style-type: none"> <li>Supplies leather footwear to - Marks &amp; Spencer, Gabor, Aerosoles, Zara, Wolverine, Mango etc.</li> <li>Supplies leather garments to - Calvin Klein Jeans and Diesel, All Saints, Kenneth Cole, Country Road, Witchery, Marlboro Classics, FCUK, Emporio Armani etc.</li> <li>Tata's performance leather division offers fully integrated leather and component manufacturing capabilities to furniture and automotive industries.</li> </ul>	Mumbai
HIDESIGN	Hidesign is the manufacturer and marketer of leather products including handbags, briefcases, laptop bags, travel bags, wallets, accessories, belts, jackets, shoes, footwear. It has 5 manufacturing facilities with operations in 24 countries.	Pondicherry
WOODLAND	Woodland offers an extensive line of footwear, performance apparel and outdoor gear. The brand has launched products made from vegetable tanned leather and the raw materials and processes used are free of any harmful substances.	New Delhi
LIBERTY	Liberty is an Indian shoe company which produces 50,000 pairs of footwear a day through its six manufacturing units and has a presence in 25 countries.	Karnal
ACTION	India's leading footwear brands for regular footwear and schoolchildren's footwear. Action shoes has many brands under it; Action School Time, Action Eva Flotter, Health Plus, Campus, Synergy.	Mumbai
BHARTIYA INTERNATIONAL LTD	Bhartiya has been one of India's largest exporter of leather apparel producing leatherwear. They have nine production facilities in the Bangalore-Chennai region of South India. The Company focuses on apparel and accessories manufacturing. Its fashion products include leather outerwear, accessories and leather finishing.	New Delhi
MIRZA INTERNATIONAL	Mirza International is a manufacturer and marketer of leather footwear and finished leather. Besides supplying products to global retailers, Mirza also has global in-house brands - Red Tape and Oaktrak. They have a presence in 30 countries.	Kanpur
FARIDA SHOES	Farida Shoes is one of the top 10 leading manufacturers and exporter of men & women leather footwear and finished leather. They operate through three main business segments: leather, uppers and shoe manufacturing units. Their products are sold under popular brand names in more than 40 countries globally.	Ambur
DA MILANO	Da Milano is a producer of high-end leather accessories. Products are exported mainly to Europe.	New Delhi
NAPPA DORI	Nappa Dori manufactures hand-made leather bags, trunks, stationery and other accessories, including a small collection of shoes. They also have an export line where they design and manufacture fashion accessories and home décor products.	New Delhi

**List of companies in the leather industry in Germany**

Company name	City
METRO AG	Düsseldorf
Schuhpark Fascies GmbH	Warendorf
Deichmann SE	Essen
Roland SE	Essen
KARSTADT Warenhaus GmbH	Essen
Schuh Germann GmbH	Pirmasens
Schuhhaus Hammerschmidt GmbH & Co. KG	Menden
Schuhhaus Wintezen GmbH & CO. KG	Mönchengladbach
Flip-Flop GmbH	Pirmasens
Lepi-Schuh GmbH	Pirmasens
Schuhparadies Gebr. Röhl GmbH	Gerolstein
Schuhhaus Bödeker GmbH	Speyer
Oberhösel Schuhe GmbH	Mülheim
Schuhhaus Robers GmbH & Co. KG	Stadtlohn
Schuhhaus Pettrup e.K.	Olfen
Schuh Grosse-Kreul KG	Gladbeck
shoes & fashion FIFTY-6 GmbH	Saarbrücken
Leder Spahn GmbH	Saarbrücken
Schuhhaus & Orthopädienschuhtechnik Königsmark GmbH	Wuppertal
SCHUHWELT Schuhhandels GmbH	Waldfishbach-Burgalben
Leder Jaeger GmbH	Siegen
meinemarkenmode.de GmbH & Co. KG	Ascheberg
Leder Schnorrenberg GmbH	Grevenbroich
Schuhhaus Keller GmbH	Ibbenbüren
Lederwaren Voegels GmbH & Co. KG	Köln
Birkenstock digital GmbH	Neustadt
Schuhgarten Rosenbaum	Jülich
Lederwaren Faber GmbH	Söst
Hans Dornemann Inh. G. Dornemann-Oltmanns e.K.	Heiligenhaus
eva k. shoes GmbH	Mülheim
Hausfelder Herbert Tondera GmbH	Dortmund
Monika Flinner Schuhmode e.K.	Idstein
Brackelsberg Schuhe GmbH	Darmstadt

Sports of Ultra GmbH	Leverkusen
Schuhwelt Weyergans GmbH & Co.KG	Düren
majo Markenschuhe clever einkaufen R. Majowski e. K.	Eschborn
Velten Gesunde Schuhe Orthopädieschuhtechnik	Meckenheim
Schuh-Beyer GmbH	Königstein im Taunus
Schuh-Pauthner	Offenbach
Perdun Gesunde Schuhe	Everswinkel
Gesetzliche Anbieterkennung Schwarz-Schuhwerk Handels-GmbH	Riedelberg
Wild Orthopädie-Schuhtechnik GmbH	Trier
Schuhhaus Wessels e.K.	Steinfurt
Schuhhaus Wolter GmbH	Kamen
Modehaus Reitmeier GmbH	Bad Nauheim
Fashionland Lederwaren GmbH	Seligenstadt
Karl Noss Lederwaren GmbH & Co. KG	Wiehl
Schlüter GmbH	Ratingen
EGGEN Raum und Idee GmbH	Erlenbach am Main
Comtesse GmbH	Obertshausen
SHOE CONZEPT Handels GmbH	Pirmasens
Schuhhaus O. Ingenpass GmbH	Dortmund
Schuhhaus Landgraf GmbH	Bonn
Orthopädietechnik W. Jaeger GmbH	Lahnstein
Frankfurter Laufshop	Frankfurt
Schuhmaxx GmbH	Oestrich - Winkel
Sport Bürger & Laschinski GmbH	Cloppenburg
Markenschuhe clever einkaufen e.K.	Kelkheim
Geier Schuhe OHG	Reichelsheim
Made In Corporation GmbH	Cologne
Mode- und Stilmöbelhaus Franz Stopa e. Kfm.	Datteln-Horneburg
QUO VADIS GmbH & Co. KG	Bergisch Gladbach
Peter Riemann Schuhhandelsgesellschaft m.b.H	Mainz
Parismoi GmbH	Neuss
Werth&Werth	Frankfurt am Main

Karl Roth (Koffer Roth) e.K.	Offenbach am Main
Red Hot and Blue GmbH	Essen-Rüttenscheid
Schuhhaus Sunderdiek	Osnabrück
APASO Verpackungen e.K.	Bergisch Gladbach
H. DELLWIG GmbH & CO. KG	Hamm
Bernhard Siehoff GmbH	Vreden
Schuhhaus Schreiber GmbH&Co. KG	Soest
Foot Locker Europe.com GmbH	Recklinghausen
Mc Schuh Werner Heckmann e.K.	Haselünne
Rühl Leder GmbH	Mülheim
Vestitus GmbH	Düsseldorf
Leder Hagemann GmbH	Bingen am Rhein
Verdi Ince GmbH	Nordhorn
Salamander Deutschland GmbH & Co. KG	Wuppertal
Kramer Schuhe GmbH & Co. KG	Ahaus
Paul Prange GmbH & Co. KG	Düsseldorf
DIRK & SABINE LINGENBERG OHG	Lüdinghausen
Berg GmbH & Co. KG	Trier
Schuhhaus Jansen e.K.	Heinsberg-Waldenrath
Sport-Kuschinski Inh. Barbara Kuschinski	Warendorf
Schuhhaus Theobald e.K. Inh. Guido Hertweck	Dillingen
Fuss-Check GmbH	Saarlouis
C.H.C Fashion GmbH	Düsseldorf
WUNSCHNAHT GmbH	Offenbach
Schuhhaus Wolfstetter e.K.	Obernburg
Hillenhinrichs Schuhmode e.K.	Damme
Luxess GmbH	Ratingen
Schuh & Sport Leussink	Schüttorf
Schuhhaus Dimer GmbH & Co.KG	Dinslaken
Bernhard Offermann GmbH	Köln
Schuhhaus Itt GmbH	Neunkirchen
Orthopädie-Schuhtechnik Baar GmbH	Ibbenbüren-Dickenberg
MWR - Schuhe GmbH	NIERSTEIN
Röseler Schuhe GmbH	Köln-Porz

Frye Schuhe GmbH & Co. KG	Bad Iburg
Indigo Schuhwerk GmbH	Großostheim
Schuh + Sport Wolfgang Ernst GmbH	Waldmohr
Mode in Leder Vorpeil OHG	Herzogenrath
Lingenberg Trends in Leder	Hagen
Terra Nation GmbH	Oberursel
Sporthaus Lang GmbH	Lünen
Schuhhaus und Orthopädie-Schuhtechnik Becker GmbH	Rees
Bernarding Schuhhaus GmbH	Schmelz
Orthopädie-Technik Bauer & Partner GmbH	Frankfurt am Main
Suchhaus Linn	Simmern
Schulze Sieg-Carré GmbH	Siegen
P. Röseler GmbH	Wuppertal
Steinwinter fashion GmbH	Miltenberg
Schuhhaus Brinker GmbH & Co KG	Herne
sorger's GmbH	Mülheim-Kärlich
Jakob Winter GmbH	Nauheim
INTERSPORT LEDER LEHNEN	Daun
Kämpgen GmbH & Co. Kommanditgesellschaft	Köln
Schuhhaus Hölscher Marlies Hüser e.K.	Emsdetten
BellModa Schuhe für Beruf & Freizeit GmbH	Pirmasens
JoJo GmbH	Marl
Schuhhaus Verfondern Fußorthopädie GmbH	Kleve
schuhe-haltern	Haltern am See
FOND OF GmbH	Köln
Dresjan & Schier Spezial - Schuhhaus	Düsseldorf -Derendorf
Marciniak GmbH	Duisburg
ANWR Media GmbH	Mainhausen
Ballsportdirekt.de GmbH & Co. OHG	Moers
Schuh- und Lederwaren Allertz GmbH	Nettetal
Der Andere Laden e.K.	Solingen
Hermann Schreiber GmbH & Co. KG	Siegen
Schuhhaus Müller GmbH	Köln

Schuhhaus Steinebach GmbH	Mayen
Schuhhaus Franz GmbH	Seligenstadt
Modehaus Hoppe GmbH	Gelnhausen
Schuh-Boshof	Heinsberg
Lederwaren Ludwig GmbH	Trier
Sole Brothers GmbH	Köln
A. Hufnagel e.K.	Darmstadt
Hertling Juwelieri UG (haftungsbeschränkt)	Essen
Koffer-direkt.de GmbH & Co. KG	Oberhausen
Raberg Leder Outlet und Retail GmbH	Wietmarschen-Lohne
Wallenborn Sporthopädie GmbH	Köln
Schuhhaus Röseler GmbH	Leverkusen
Ernsting's family GmbH & Co. KG	Coesfeld-Lette
Pro Fashion Modevertriebs GmbH	Hachenburg
Auftritt Koll GmbH und Co. KG	Würselen
Step In GmbH	Drensteinfurt
Graf Uhrarmbänder GmbH	Obertshausen
Schuhhaus Enners GmbH & Co.KG	Bad Marienberg
Eberhard Brecklinghaus Lederwaren GmbH & CO. KG	Essen
peoples place GmbH & Co. KG	Wiesbaden
Media Blue GmbH & Co. KG	Neuenkirchen
HD Company GmbH	Moers
Schuh-Schaefer GmbH	Wiesbaden
Schuhhaus Ostermann GmbH	Dorsten
Sack&Pack Reiseausrüstungen GmbH	Krefeld
Messerich Mode KG	Simmern
A. Zänker Orthopädie-Schuhtechnik und Schuhhaus GmbH	Herne
Schuhhaus Feldmann e.K.	Salzbergen
Kempkens Reitstiefel GmbH	Krefeld
Naketano Retail GmbH	Essen
Schuh + Sport Schüller GmbH	Bad Neuenahr-Ahrweiler
Modeschmuck-for-you.de	Troisdorf
Debusmann GmbH	Holzhausen

Schuhhaus Klauser GmbH & Co. KG	Wuppertal
Heinrich Potthoff Schuhhaus GmbH	Gütersloh
Schuhhaus Hanna GmbH	Schwerte
Gerbracht-Schuhe GmbH	Vechta
Lemm Mode in Leder	Krefeld
GFP Service GmbH	Oberhausen
Sutmöller Bücher & mehr	Melle
Life & Style	Kirchhellen
Schuhhaus Schütte	Neuenkirchen
S.Grothwinkel GmbH	Krefeld
Das Schuhhaus Berger	Münster
Leider Schreiner	Aschaffenburg
Werner Rake Herrenmoden e.K.	Düsseldorf-Oberkassel
RHEINER FASHION GmbH	Rheine
Mode Arlinghaus GmbH	Damme
Neue Wege, Schuhe fürs Wohlergehen	Aachen
Orthopädieschuhmachermeister DIRK KLEIN	Köln
Schuh Heystermann	Kevelaer
Orthopädie – Schuhtechnik W.Krauser GmbH	Kleinblittersdorf
SCHUHHAUS HCH. ZUMNORDE GMBH & CO. KG	Münster
Schuhhaus Flossbach GbR	Wipperfurth
INSIDE Textilhandels GmbH	Erkelenz
Schuh-Eck Hermann Reinermann Inh. Sabine Reinermann e.K.	Dülmen
kofferfunshop.de e.K.	Bonn-Beuel
Schuhmode Schnütgen	Wermelskirchen
Schuhhaus Marx e.K.	Rüthen
Holthaus- Pohlmann GmbH	Mettingen
Heinrich Küper OHG	Werne
K Line Taschendesign	Wiehl
Schuhhaus Johannes Multhoff OHG	Altenberge
Lederschatulle	Hanau
Bernd Hoffmann Orthopädie-Schuhtechnik	Raesfeld
Stinshoff Schuhe	Dortmund
G. K. Mayer Shoes	Rodalben

Romano-Fashion	Neuwied
Schuhhaus Hermanns GmbH	Aachen/Brand
Leder Heger-Berensen GmbH	Lingen
Blaumeiser GmbH	Gerolstein
Jamoda	Mettingen
Jänsch – Der Fußspezialist GbR	Wiesbaden
Schuhhaus Thissen GmbH	Kleve
Kraft-Schuhmode Inh. Christine Brand e.K.	Büdingen
Schuhhaus Grill	Wallerfangen-Ittersdorf
Elsa Coloured Shoes	Emmerich am Rhein
Marie Claire Fashion	Mönchengladbach
Franz Prange & Sohn	Arnsberg - HÜSTEN
ASM Senioren Schuh W. Muddemann	Nordwalde
The Listener GmbH	Frankfurt
Leister Exquisit GmbH Schuhe und Taschen	Aschaffenburg
Schuhe Sport Orthopädie Holterhus	Quakenbrück
Sanitätshaus Bandagen Mülders	Krefeld
Orthopädie-Schuhtechnik Kreißl	Friedberg/Hessen
Johanne Bossmann & Judith Müller GbR	Köln
Schuh-Dömer GmbH	Bochum
Schuhe Albers OHG	Lingen
Schuhhaus Hemmersbach GmbH	Elsdorf
Schuhhaus Lachmayr GmbH	Köln
Panknin Schuhe Lifestyle Freizeit	Willich
Alina Landhausmoden	Bad Neuenahr-Ahrweiler
Michael Grosche	Bochum
Schuh-exclusiv Kettler GmbH & Co. KG	Arnsberg
Joachim Hasler	Korschenbroich
Maria Harenberg GmbH & Co. KG	Münster
Aido-Lederwaren GmbH und Co. KG	Obertshausen
Schuhhaus Franke	Steinfurt
Medusa	Münster
Schlingmann Schuhfabrik D. Schlingmann	Sassenberg-Füchtorf



Orthopädie - Schuhtechnik M. Braun	Bitburg
Schuh und Mode Gindorf	Trier
Schuhhaus Fritz GmbH	Lauterecken
Schuhe-Sport-Freckmann	Nottuln
Schuh-Mode Lambertz	Oberhausen Sterkrade
Shoe-Point	Geilenkirchen
Schuhhaus Kurre	Bramsche
Schuh-und Sporthaus Josef Plum Inh. Thomas Plum e.K.	Roetgen
Longtime Gothic Vertrieb	
gangart Sport und Orthopädie	Bonn
Ahmo Shoes	Wuppertal
Anke Just Sattel & Co.	Gersten
U-SHE UG (haftungsbeschränkt)	Olsberg
Fa. Heinrich Gabler, e.K.	Frankfurt am Main
SCHUHHAUS MEYERING am MARKT in HAREN	Haren
Roland Herrenschuhe	Düsseldorf
Schuh-Hemmerich GmbH	Hamm
Thomas Kappel Orthopädie-Schuhtechnik	Völklingen
Schuhhaus Hilbers Inh. Beate Reusch e.K.	Nordhorn
Schuhhaus Bünker GmbH	Lohne
Schuh und Sport Egenberger GmbH	Ratingen
Schuhhaus Emde e.K.	Coesfeld
Schuhhaus Heller	Hattingen
Schuhhaus Winkler	Tecklenburg
Schuhhaus Meyer GmbH	Wallenhorst
Schuhhaus Schöwing e.K.	Bad Iburg
Schuhhaus Steeg	Nastätten
Packenger GmbH	Mülheim an der Ruhr
Jung-Schuhe	Waldheim
Nikolay Schuhe	Schalksmühle
Orthopädie-Schuhtechnik Hassler GmbH	Birkenfeld
LANDSKNECHT Schuhhaus & Orthopädie Schuhtechnik GmbH & Co. KG	Arnsberg
United Brands 24 GmbH	Hanau

Jost GmbH	Hachenburg
Schürmann Reitsport&Mode	Lüdinghausen
Hochzeitshaus Marryfair	Bitburg
Elly Melly & Stone e.K. Sportcenter	Groß-Gerau
Sesto Mode & Flair e.K.	Hasbergen
ELENA FASHION	DÜSSELDORF
Trendstudio Boutiquen	Bad Nauheim
Haffke GmbH & Co. KG	Wesel
Schuhhaus Dielmann GmbH & Co. KG	Darmstadt
Billo Schuhe	Bruchköbel
Rickmann Schuhmode	Münster
Le Sac	Limburg / Lahn
Schuhhaus Lötte GmbH & Co.KG	Bochum
Poss Orthopädie-Schuh-Technik	Trier
Mulligan's	Wuppertal
Schuh Willemssen GmbH	Uedem
Gänsefüßchen	Bonn
Schuhmoden Kattenbaum e.K.	Sassenberg
Anette KAMPS	Köln
Verantwortlich Schuhe & Sport Münch-Delaporte	Miiltenberg
Galerie neu & alt	Freudenberg
SPORT BRANG	Jünkerath
SCHUHmacher Schuhhaus	Siegen
Schuhhaus Alfons Böckmann	Emstek
Max Shoes GmbH	Leverkusen
W. u. H. Blasberg KG	Solingen
Giacomo Kidswear	Nordhorn
Schuhhaus Anton Rollmann GmbH	Bad Neuenahr-Ahrweiler
Schuhhaus Welter oHG	Baesweiler
pka KLÖCKER GmbH	Erkrath
Ludger Vöcking GmbH	Ahaus-Wessum
Jacoform Bioline Naturbewußte Mode Vertriebs GmbH	Hückelhoven
Schuh + Sport Kröse oHG Orthopädie - Schuhtechnik	Emlichheim
Active Sportshop Münster GmbH	Münster

Sport Grimm	Dieburg
Schuhhaus Kruse	Neuenkirchen
Schuh-Sport-Mode Heinrich Kälker	Bad Laer
Schuhhaus Möller	Bottrop-Kirchhellen
Ludwig GmbH	Alzey
Schuh Brückner	Diepholz
Impulse Fitness	Köln
Monsieur C.O. Reuter	Mainz
Modehaus Ronellenfisch KG	Merzig
Hendrik Tott GmbH & Co. KG	Essen
BAGS & BRANDS	Nieder-Olm
Schuh- und Sporthaus Albert Plock GmbH	Ibbenbüren
Schulte GmbH	Osnabrück
Orthopädie Plum	Alsdorf
JANNASCH OPTIK	Remscheid
Wagner GmbH & Co.KG	Bad Kreuznach
Stöckelwild Tebartz & Tebartz GbR	Schermbeck
Kurz & Klein Kindermode	Essen-Werden
Christian Schaefer Leder- und Warenhandels GmbH	Euskirchen
Leder Weil	Frankfurt am Main
Schuhhaus Einspanier	Haren
Keil GmbH	Stockstadt
MODEHAUS GROSCHE KG	Münster
VANILLA Shop	Frankfurt/Main
Schuhhaus Johannes Rahms	Schöppingen
Pinocchio Kinderschuhe, Inh. Ulrich Kaldasch	Brühl
Volker Amtmann Art Case Technikhandel und Flightcasebau	Düren
palm shoes GmbH	Langenfeld
Lederwaren Hutmacher GmbH	Schermbeck
Romeik Ohg	Gevelsberg
WUNDERHAUS GMBH & CO. KG	DÜSSELDORF
Elfriede Schwarz Schuhfachgeschäft,Inh. Weigel OHG	Siegen
Warehouse One GmbH & Co. KG	Düsseldorf

NAH-TEX GmbH	Erkelenz
Schuhhaus Bütter OHG	Osterwald
Sport Ules Inh. Christoph Ules e.K.	Herten
A.Fischer GmbH	Niedernberg
Schuhe Lang	Merzig
Schilder Schuh OHG	Köln
Koffer Klein e.K.	Frankfurt
Günther Schwierien	Neuss
Mad – my lifestyle	Melle
Schuhhaus Junk	Netphen
Quik Schuh	Bad Homburg
Leder Penschek	Duisburg
andrea risto WITZHELDEN	Leichlingen – Witzhelden
Haralad Raum	Emlichheim
Raumgestaltung Kemper GbR	Wettringen
Laez GmbH	Bonn
big in menswear e.K.	Steinfurt
Adelante Mallorc Dieter Kerkhoff	Münster
DANIELA DAMM	Frankfurt am Main
Kahlstatt Lederwaren	Friedrichsdorf
Hupp Orthopädisches Schuh- & Bandagenhaus	Beerfelden
Nappa Lux Lederwaren GmbH	Wesel
Bags & More	Nettetal
Taschenprofi	Remscheid
Sittig GmbH	Paderborn
Schlagenwerth Orthopädie Schuhtechnik GmbH	Dorsten
Orthopädie-Schuhtechnik, Reto-Bruno Althaus	Medebach
Mic Mac moden	Warstein
le paris	Castrop-Rauxel
Leder-Stoll OHG	Frankfurt am Main
E & R Schuhmarkt inh.Rainer Höhne	Dortmund
Leder Diener Ihr Lederwaren-Fachgeschäft	Frankfurt am Main
Leder Kubach GmbH	Trier

Ledermöbel Schäfer GmbH	Wuppertal
Maria Harenberg GmbH und Co. KG.	Bonn
Schuh-Walbert - Gut zum Fuß	Aachen
Schuhhaus Büsse, Inh. Robert Büsse e.K.	Geseke
HEIMANN Schuhmoden	Arnsberg
Rancho Fashion GmbH	Nörvenich
Schoenes-verschenken	Dorsten
Ross & Rind Lederatelier	Köln
Limon GmbH	Köln
Lederwaren-Kiste Andrea Blüm	Attendorn
Bovie GmbH & Co. KG	Viersen / Germany
Identità-Italiana	Düsseldorf
Oranien-Truhe	Netphen
Brinker Motorcycle	Bawinkel
MALU MODE	Köln
Rosa Valenz	Bad Honnef
Leder Heinz	Neu-Isenburg
LedermanufakturKarl Pieroth & Co. GmbH	Offenbach
Erich Volkert & Co	Offenbach
Schuhhaus Scheid	Geeste
Lederwaren Brass Inh. Jörg Richter e.K.	Düsseldorf-Benrath
Molless GmbH	Kleve
leder-berni	Osnabrück
Schuhhaus Reitzer	Siegen
Werner Schuhe GmbH	Pirmasens
Schuhhaus Weis	Leidersbach
Der Taschenladen Frankfurt Angelika Nachtsheim	Frankfurt am Main
MP-direct Michael Kames Angelgeräte	Linnich
Freizehn Stefanie Steinert	Eitorf
Lack & Leder Klinik	Leverkusen
Copco Case Spezialkoffer	Koblenz
Zarini deutsche Schuhmanufaktur	Pirmasens
Casa Mina Design - Farid Madih	Troisdorf
Mathias Schmitz GmbH	Aachen

H. F. Anton GmbH	Solingen
Leder Braun Vertriebs-GmbH	Rödermark
Hans Mindel Handelsvertretung	Windeck
tragbar.   taschenladen	Frankfurt
PELEDESTO	Bad Honnef
TREND BAGZ GmbH	Essen
Calino GmbH	Düsseldorf/Oberkassel
Heefa Lederwaren GmbH	Waldböckelheim
Sport Hölzel GmbH	Gelsenkirchen
Leder Rabe GmbH	Osnabrück
Da.paso GmbH	Ennepetal
Schuhhaus Hoberg GmbH & Co. KG	Attendorn
Modehaus Wobbe	Alfhausen
Diehl & Diehl	Frankfurt
Petra Goldmann Leder Design	Münster
VDV Benefit GmbH	Hattingen
Schuhhaus Stratmann GmbH	Bestwig
Steffen Orthopädie-Schuhtechnik und Bequeme Schuhmode.	Oberhausen
Sport Polster	Troisdorf
Milksugar	Köln
Frau Schuh Barbara Wehmeyer	Münster
Kamps -Textilhaus seit 1928	Nordhorn
Ledermoden Köhler, Bad Kreuznach	Bad Kreuznach
Aladinschuhe Sarper Kara	Nidda
DIE TASCHE Inhaberin: Gabriele Jungnickel	Solingen-Ohligs
Lehrter Lederwaren	Ibbenbüren
Bathe Schuh-Sport	Werdohl
Claudius Deichmann Garten- und Landschaftsbau	Offenbach-Bieber
Ziegler Kunsthandwerk Lederwaren	Xanten
Müller Nicoel Schuhmode	Oberhausen
Suzanne Köhler Modehandelsgesellschaft mbH	Geldern
Das Lederhaus	Oelde
HGL Lederwaren GmbH	Weinsheim

Bayer Lederstudio	Seligenstadt
Moses AG	Bad Neuenahr-Ahrweiler
Schuhhaus Pieper Inhaberin Annegret Gülker	Raesfeld-Erle
Schuhhaus Kocken GmbH & Co. KG	Viersen
KIESOW seit 1850 Sebastian Kiesow e.K	Kleve
Thórralf Schuh	Leverkusen
SCHUHFABRIK24	Willich
Sport Wonsyld Inh. Wolfgang Wonsyld e.K.	Oberhausen
MondoVita Inh. Brigitta Mex e. K.	Dortmund
KS-Solid GmbH & Co. KG	Uedem
Reitsport McArthur	Meckenheim
Schuhhaus Tervooren oHG	Rheinberg
Porzellanhaus Josef Ostermann	Ahlen
Leder Röer	Merzig