



“Market Research and Monitoring on the leather industry in selected Asian countries: China, Indonesia, Philippines, Vietnam”

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## **STUDY REPORT: MARKET SURVEY ON VIETNAM**

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# INDEX

## **SECTION A: COUNTRY REPORT**

1. **Political background**
2. **Economic background**
3. **Foreign trade**
4. **Commercial relations with Italy**

## **SECTION B: MARKET STUDY**

1. **Executive summary**
2. **Country regulations**
  - 2.1 Import and Export Activity
  - 2.2 Customs Regulations
  - 2.3 Foreign Investments
  - 2.4 Industrial Activities
  - 2.5 Distribution Channels
3. **State of the Industry**
  - 3.1 Tanning Industry
    - 3.1.1 Geographical location
    - 3.1.2 Raw material supply and trade
    - 3.1.3 Current situation of the industry
    - 3.1.4 Current processing capability
    - 3.1.5 Profile of major companies
      - 3.1.5.1 *Specific production profiles of some main companies*
    - 3.1.6 Development plan of the industry
  - 3.2 Leather Footwear Industry
    - 3.2.1 Geographical location
    - 3.2.2 Current situation of the industry
    - 3.2.3 Current processing capability
      - 3.2.3.1 *Production process and technology*
      - 3.2.3.2 *Raw materials supply and trade*
    - 3.2.4 Profile of major companies
    - 3.2.5 Development plan of the industry
  - 3.3 Leather Goods Industry
    - 3.3.1 Geographical location
    - 3.3.2 Current situation of the industry
    - 3.3.3 Current processing capability
    - 3.3.4 Profile of major companies
  - 3.4 Upholstery Industry
4. **State of the Market**
  - 4.1 Market Features
  - 4.2 Local Consumption and Leather Supply
    - 4.2.1 Current situation
    - 4.2.2 Forecast of local demand
5. **State of Competition**
  - 5.1 Leaderships and Main Competitors
  - 5.2 Options to penetrate the domestic market
  - 5.3 Potential partners
  - 5.4 Distribution Channels

## **SECTION C: APPENDIX – COMPANY PROFILES OF VIETNAMESE MANUFACTURERS**

*Section A*

# **VIETNAM**

## **COUNTRY REPORT**

## **1. Political background**

The French colonialism permitted only limited expression to Vietnamese opposition, destroyed the traditional equilibrium of village life, undermined the authority of the scholar-gentry class and blocked the growth of an indigenous bourgeoisie. The reaction to French administration was communism: a number of communist groups were formed during the 1920s and the Communist Party of Indochina was created by Ho Chi Minh in 1930.

The second world war transformed the Communist Party's prospects. The communist united-front organisation, the Vietminh, quickly filled the vacuum left by the surrender of Japan in August 1945, and Ho Chi Minh proclaimed the independence of the Provisional Democratic Republic of Vietnam.

The French refusal to give up its colony led to a protracted war. In 1954, the Vietminh inflicted a humiliating military defeat on the French at Dien Bien Phu. The conference divided the country at the 17<sup>th</sup> parallel but failed to achieve agreement on a political solution. Soon after the Geneva accords the US-backed Catholic northerner, Ngo Dinh Diem, took power in the south. Diem's intransigence dampened hopes for a peaceful reunification. In 1959 the Hanoi authorities approved a more active strategy in the south, and in the following year the National Front for the Liberation of South Vietnam (NLF) was formed to oppose Diem.

After the assassination of Diem in November 1963 the conflict turned increasingly into an American war. In January 1968 the war reached a turning-point when communist forces launched the Tet offensive. In the wake of the offensive, the US, agreed to hold peace talks in Paris and in January 1973 the parties finally agreed on the terms for the withdrawal of US troops.

The direction of economic policy and Vietnam's foreign relations dominated intra-party debate well into the 1980s, although, for the most part, consensus was maintained throughout this testing period. The landmark Sixth Party Congress in 1986, at which the party made its historic commitment to economic "renovation" (doi moi), did not break the cohesion of the leadership. The economic reforms had by the late 1980s become part of the new consensus, but after communist regimes came under threat in the Soviet Union and Eastern Europe, there was no prospect of matching political liberalisation. In so far as political reform is on the agenda, it continues to be based on the premise that the party will remain the leading political force, although in 1997 there were moves to institute greater democracy "at the grass-roots level" to serve as a counterweight to increasing corruption and bureaucracy.

In the meantime (July 1995), diplomatic relations were normalised with the US and Vietnam becomes a member of the Association of South-East Asian Nations (ASEAN).

In June 1996, seeking a balance between economic reformers and the conservative bloc, the Eighth Party Congress expresses support for continued economic reform while opposing political liberalisation.

In June 1998, for the first time the government and the aid donor community hold a mid-year meeting to discuss the next phase of Vietnam's reforms, which the donors regard as urgently needed to counter the effects of the regional economic crisis.

## **2. Economic background**

Vietnam remains an agrarian society, with 70% of the labour force working in agriculture and forestry. However, just 26% of current-price GDP was generated in this sector in 1997, down from 41% in 1991. Despite the falling share, agricultural growth has been robust, value added rising by 4.4% annually between 1993 and 1997. The most rapid growth has been in primary goods as

coffee, rubber and sugarcane. The yield of rice, which accounts for almost half of agricultural output, has doubled since 1987, enabling Vietnam to become the world's second largest rice exporter. The production of coffee is increasing and Vietnam, in volume terms, is now the third largest exporter of coffee in the world.

Rapid industrial growth, averaging almost 14% annually between 1993 and 1997, was a major contributor to the 8.9% average yearly increase in GDP during the same period. All industrial subsectors have shared in this expansion, so changes in the structure of industry have come slowly, although since 1990 growth has been particularly rapid in steel products, garments and footwear. The oil and gas industry accounted for 16% of industrial activity in 1996 (latest available data), up from 11% in 1993, but will grow less quickly from 1999 onwards as few new fields are expected to come on stream.

The state-owned sector generates two-thirds of industrial output, a proportion that has remained stable over the past several years. Despite its smaller contribution to GDP, the non-state manufacturing sector employs four times as many workers as the state sector. The fastest growth is in foreign-invested industrial enterprises, whose output grew by 20% in 1997-twice as fast as state-owned or private industrial firms.

The services sector has expanded at about the same pace as overall GDP since 1990. In recent years the fastest growing subsectors have been banking, finance and insurance (which started from a low base and in 1997 accounted for a little over 5% of the sector's total output).

The share of investment in GDP has risen rapidly, from 11% in 1990 to 31.7% in 1997. Although the precise numbers need to be treated with caution, they do reflect a genuine strong upward trend. The rise in investment has been financed by increased government savings (6% of GDP), more foreign loans, aid and direct investment (9% of GDP) and a compression of domestic consumption, which has permitted domestic savings to rise to 16% of GDP. As a result of the Asian crisis, investment inflows have fallen, but the EIU still expects the share of investment in GDP to be close to 30% in 1998.

After reunification of the two halves of the country in 1976 the government of the new Socialist Republic of Vietnam moved quickly to impose on the south the orthodox, Soviet-style, central-planning model that had been in force in the north since 1954. The failure of this model gradually forced Vietnam's leaders to abandon it and to edge their way towards a policy of renovation (*doi moi*), which was formally adopted at the Sixth Party Congress in December 1986. The reform process is well under way and although it is far from complete, it is certainly no longer reversible.

The results of the changes were spectacular. Agricultural output rose by 7.5% in 1989 and the country suddenly became the world's third largest exporter of rice. Annual average inflation rates fell from 308% in 1988 to 35% in 1989. GDP rose by 8%, the best performance in a decade, and the boom in agriculture and services easily offset the industrial stagnation that followed the ending of state subsidies. The timing was fortunate, too, since the rise in revenue from oil exports almost exactly offset the decline in aid from the Eastern bloc and provided an important source of budgetary revenue during the transition years.

The momentum for reform continued after 1989. Foreign and joint-venture banks were permitted from June 1991 and important gaps were filled in the legal framework by the passage of, among others, a land law, a bankruptcy law, a labour code, a domestic investment law and a mining law and by the creation of a modern tax structure. Despite early setbacks, including the collapse of most of the credit co-operatives in 1990, by 1992 Vietnam had a market-driven rather than a planned economy.

The Public Investment Programme 1996-2000 (PIP), is the most complete articulation of the government's economic policy and goals. The PIP projected annual GDP growth of 9-10%, based on growth of about 4.5% in agriculture, 14% in industry and 12% in services. The targets were essentially realised in 1996 and 1997 but are no longer realistic as the regional economic crisis takes its toll on Vietnam's growth prospects. Officially the government expects GDP to grow by 6% in 1998-still unduly optimistic-and for growth to be only slightly lower in 1999. A resumption of rapid growth depends heavily on restoring the inflow of foreign capital.

The reform process is far from complete, however. Major institutional gaps still need to be filled. The banking system is particularly fragile, with large amounts of non-performing loans that will limit its future role. Its deposit base is small-only 21% of GDP-and it is poorly regulated. A bond market, dealing chiefly in Treasury bills, is in operation, but the launch of a stockmarket has been postponed repeatedly since the idea was first mooted in 1991.

Although the legal groundwork on state enterprise reform has been done, implementation has been slow. About 30 small firms have been "equitised" (ie shares have been issued), and most of these have been privatised.

GDP rose by 5.8% in 1998, powered by a 12.1% increase in industrial output.

The economy's performance was good enough to reduce the poverty rate but not the unemployment rate.

The outlook for 1999-2000 is the following: GDP growth will fall to 4.6% in 1999, as a result of lower investment and slow export growth. By 2000 growth will pick up to 6.1% as exports recover. Smaller state-owned enterprises will slowly be equitised, while the larger ones will increasingly be driven by market forces as their privileged access to credit and other government favours is gradually restrained.

**Forecast summary**  
(% change year on year unless otherwise indicated)

	1997(a)	1998(a)	1999(b)	2000(b)
<b>Real GDP</b>	8.8	5.8	4.6	6.1
<b>of which:</b>				
- agriculture	5.1	3.6	3.5	3.8
- industry	13.1	12.1	6.0	8.5
- investment	13.0	5.0	5.6	8.5
- exports	12.5	9.0	8.5	9.8
<b>Consumer prices (av)</b>	3.1(c)	8.7	7.5	8.0
<b>Exports fob (\$ m)</b>	9,269	9,356	9,584	11,197
<b>Imports cif (\$ m)</b>	11,743	11,390	11,875	13,927
<b>Current-account balance (\$ m)</b>	-1,696	-1,316	-1,866	-2,292
<b>Exchange rate (av; D:\$)</b>	11,745(c)	13,300(c)	14,700	15,435

(a) EIU and official estimates. (b) EIU forecasts. (c) Actual.

In 1999 export growth is expected to slow again in national accounts terms, to 8.5% from 9% in 1998. It will be sustained at this level by relatively strong growth of some commodity exports including oil and coffee, and of some of the newer manufactured exports, such as computers and computer parts and electronic appliances and accessories. As in 1998 demand for more traditional manufactured exports, in particular textiles and garments and footwear, will be weak, especially in the Asia region. In the absence of a trade agreement between the two countries the hoped-for boost to exports that is expected once the US gives Vietnam the status of normal trade relations (NTR, formerly known as most favoured nation) is not expected to materialise during the forecast period. However we do expect export growth to pick up in 2000 (to 9.8%) as recovery takes hold in South Korea and other important regional markets.

Two traditional sectors of Vietnam industry, as footwear and garments, are in the doldrums. Particularly, after expanding rapidly over the past few years, footwear production reached a plateau in 1998, as exports fell by 0.5% in dollar value terms compared with the year before. This year promises to be even more difficult as producers face "a serious lack of orders and pressure to reduce prices", according to the Vietnam Footwear Association. Competition from China and Indonesia has intensified, although the Indonesian Shoe Producers' Association believes that they have lost investors to Vietnam because the investment climate there is now more favourable. Footwear producers in Vietnam complain that they have been disadvantaged by a high export tax. They also claim that over the past year or so the wages they pay have doubled relative to wages paid in Indonesia. This is probably because of the increasing dong value of the minimum wage.

The garment industry is also in the doldrums. In 1998 exports were just 0.1% higher (in dollar terms) than in 1997. The Ministry of Trade expects to change the procedure for allocating quotas for the important EU market by allowing bidding on 20% of the quota for the nine main categories of garments. In principle this should help quotas flow to the most efficient producers. The ministry sees the new procedure as experimental, and has been forced to take this route as part of the agreement that expanded the quota provided by the EU.

### **3. Foreign trade**

Before the reforms of 1988-89 export earnings covered only 30-50% of imports. The US-led embargoes on trade and finance restricted the opportunities for trade outside the Council for Mutual Economic Assistance (CMEA, Comecon) bloc, while stagnation in the CMEA countries limited growth in that market.

Until the reform process got under way in 1988 there was a bias against foreign trade. Economic policy under central planning was generally inward-looking. The overvaluation of the dong, the requirements imposed by the state plan, the attractions for state enterprises of selling on the domestic open market, tight regulation of foreign exchange and the monopoly of state trading companies all discouraged exports.

A series of adjustments to the official exchange rate brought it into line with the free-market rate in 1989. Measures were also taken to further the decentralisation of foreign trade, which had begun, somewhat tentatively, as early as 1981. These reforms led to a surge of exports to the convertible area. In 1989 they increased by 154% compared with 1988, putting the trade balance with the convertible area into surplus. During 1991-96 the dollar value of exports grew at an annual average rate of 29%. The emergence of Vietnam as a major rice and coffee exporter, rising oil exports and growing access to new markets for its textiles and garments, as well as for traditional commodities such as rubber, coffee and seafood, have also helped boost earnings.



Recorded merchandise exports now constitute about 47% of GDP, making Vietnam one of most open economies in the region. Despite this, exports per head were worth only \$97 in 1996, an indication that Vietnam is a long way behind such countries as Thailand (\$905 per head in 1996) and Indonesia (\$255 per head). Exports of light manufactures were worth \$28 per head in 1996, reflecting the fact that commodities (oil, rice, rubber, coffee and marine products) are still a large component of Vietnam's exports.

In 1998 exports stagnate and imports fall. As the matter of fact, that the value of exports rose by just 0.9% to reach \$9,356m in 1998, while imports fell by 3% to \$11,390m. This left a trade deficit of \$2,034m, down from \$2,474m in 1997. According to estimates from the government and the World Bank towards the end of the year, the trade deficit translated into a current-account deficit of \$1.2bn-1.3bn, well down on the \$1.7bn deficit recorded in 1997. This was achieved despite the likelihood that services credits declined (as tourist numbers fell by at least 6% and possibly as much as 12%, depending on which set of official figures are to be believed) and private transfers fell (as the number of Vietnamese working abroad contracted). These falls were probably partly offset by higher public transfers as aid disbursements of all types, including grants.

The dollar value of exports was flat in 1998 partly because of the price of crude oil, which essentially offset the 26% rise in the volume of oil exports. The fall in earnings from oil was almost offset by a rise in earnings from rice. Exports of textiles and garments, and footwear, which collectively account for one quarter of all exports, stagnated as important export markets in Japan and South Korea shrunk and competitors in Indonesia and elsewhere gained a cost advantage from their currency depreciations. It was a reasonably good year for marine products, earnings from which increased by 8.8% to \$850m despite the disruption caused by some of the worst typhoons in living memory. Some "new" manufactures, such as computers and computer parts, emerged as important export earners.

#### Export 1998

Value		
	\$ m	% change(a)
Rice	1,100	26.4
Coffee	594	21.0
Rubber	n/a	n/a
Crude oil	1,200	-15.4
Coal	"nearly \$100m"	about -12
Textiles & garments	1,350	0.1
Footwear	960	-0.5
Marine products	850	8.8
Computers & computer parts	490	43.1(b)
Electronic appliances & accessories	458	n/a
<b>Total incl. others</b>	<b>9,356</b>	<b>0.9</b>

(a) Compared with 1997.

(b) (b) First 11 months only.

Source: Press reports.

The fall in imports is partly explained by falling petroleum product prices, but also by the sharp slowdown in foreign investment disbursements, which reduced the need to import machinery and equipment. The apparent import restraint is also because of continued protectionism, both through the use of tariffs and quotas, and by restricting access to foreign exchange. This policy is expected to continue into 1999, although the World Bank has said that it should be abandoned.

**Imports, 1998**  
(m tonnes unless otherwise indicated)

	Volume	% change, year on year
Cars(a) (units)	16,297	16.6
Motorbikes(a) (units)	353,000	260.2
Petroleum products	6.73	13.2
Fertiliser	3.3	34.2
Steel	1.65	24.9
Materials for leather shoes & garments (\$ m)	n/a	-38.9
<b>Total value (\$ m)</b>	<b>11,390</b>	<b>-3.0</b>

(a) Both fully assembled and as completely knocked-down (CDK) kits.

Source: Press reports.

**Main trading partners (%)**

	1994	1995	1996
<b>Exports to:</b>			
Japan	29.1	26.8	21.3
Singapore	14.6	12.7	17.8
South Korea	2.1	4.3	7.7
Taiwan	5.4	8.1	7.4
China	7.3	6.6	4.7
US	2.3	3.1	2.8
EU	13.9	18.0	16.2
<b>Imports from:</b>			
Singapore	19.7	17.5	18.2
South Korea	12.4	15.4	16.0
Japan	10.0	11.2	11.3
Taiwan	6.8	11.1	11.3
China	2.5	4.0	3.0
US	0.8	1.6	2.2
EU	17.5	13.4	14.0

Source: General Statistical Office, Statistical Yearbook.

In matter of foreign investments, the licences were granted for 260 projects in 1998, representing registered capital of \$4.06bn, just 10% less than in 1997. In addition 133 ongoing projects asked to increase their capital by a total of \$769m, a figure 30% lower than in 1997.

**Foreign investment commitments  
(by country, 1998)**

	No. of projects	Value (\$ m)
Russia	4	1,307
Singapore	36	893
UK	5	481
Taiwan	67	253
Hong Kong	23	230
Japan	17	178
South Korea	13	149
Channel Islands	3	123
US	16	92
France	17	84
Other	59	269
<b>Total</b>	<b>260</b>	<b>4,059</b>

*Source: Vietnam Investment Review.*

Actual disbursements of foreign investment fell to \$1.22bn in 1998, a drop of 44% compared with 1997. This does not include spending on unlicensed projects, which are considered to be numerous. The Ho Chi Minh City planning and investment service estimates that Taiwan investors alone have sunk money into 600 projects, capitalised at nearly \$1bn, which are under the nominal ownership of local investors. Consideration is being given to legalising such projects, provided they have met their tax obligations.

The fall in disbursements of foreign investment has been offset to some degree by an increase in aid disbursements, which rose to \$1.4bn in 1998 from \$1.02bn in 1997. Between 1993 and 1997 donors pledged \$10.8bn in official development assistance, nine-tenths of which was in the form of low-interest loans. By the end of 1998, about 45% (\$4.9bn) of this total had been disbursed. The World Bank has continued to criticise the slow pace of aid disbursement, but this argument has now lost much of its force.

Vietnam's "multidirectional" diplomacy has been explicitly based on its perception of growing global economic interdependence. Its integration into the regional and global economy is being formalised through membership of international organisations. The most important of these is the Association of South-East Asian Nations (ASEAN), which Vietnam joined in July 1995. The Asia-Pacific Economic Co-operation (APEC) forum has agreed in principle to admit Vietnam. Vietnam has also applied for membership of the World Trade Organisation (WTO). Vietnam gained observer status in its predecessor, the GATT, in July 1994. Its admission to the WTO is unlikely to take place for a few more years and will require the support of the US and the European Union, both of which are currently unimpressed by Vietnam's credentials as a trade liberaliser.

Within the framework of the ASEAN Free-Trade Area (AFTA) Vietnam is committed to cut tariffs on imports from the other ASEAN countries. It is not, however, expected to catch up with the six countries that joined ASEAN before Vietnam. They are committed to reducing their common external preferential tariffs to 5% or less by 2003. Vietnam has been allowed until 2006 to come into

line with these members of the association. It hopes that of ASEAN membership will strengthen its already extensive trade and investment links with the individual ASEAN countries.

Discussions are proceeding on an accord with the US that would grant “normal trade relations status” to Vietnam, but a conclusion is some way off. Yet the economic consequences of full normalisation with the US are potentially enormous, particularly for Vietnam’s prospects as an exporter of low-cost manufactures such as textiles and shoes. Vietnam has rapidly developed its exports of garments to the EU, helped by an agreement on quota arrangements, which was recently renewed and expanded.

#### 4. Commercial relations with Italy

Commercial relations between Vietnam and Italy are still modest. Although, opportunities Vietnam could offer in the meddle term. Italian business people generally prefer to establish commercial and economic relations with other Asian countries that could offer more profitable outcomes.

The main reasons of the limited relations between the two countries are especially the lack of a financial and banking structure in Vietnam and the Italian industrial structure highly based on small and middle size enterprises (SME). This situation obliges Italian entrepreneurs to turn to foreign banking system or international trade companies and to support high costs. On the other hand, SME have difficulties to face a faraway market with many difficulties in the legal system.

**Trade between Italy and Vietnam  
(It Lire bn)**

	1995	1996	1997	1998
Italian Export	170 (+36,3%)	246 (+44,2%)	204 (-16,8%)	195 (-6,5%)
Italian Import	179 (+103,2%)	240 (+33,9%)	402 (+67,7%)	476 (+18,2%)
Balance	-9 (-46%)	6 (+14%)	-198 (-204%)	-281 (-80%)

*Note: % change year on year*

*Source: Italian Official Statistics.*

Figures concerning Italian trade with Vietnam show a steady balance deficit for Italy apart a limited surplus in 1996. Italian exports essentially consist in working machines in different sectors: electrical, tools, steam engine, tanning, textile, plastic, etc..

Vietnam exports to Italy essentially consist in footwear, garments and textiles, coffee and fish. Among European countries, Italy is placed at the fourth position after Germany, France and U.K..

Italian investments in Vietnam are very limited having a twentieth position among other investor countries with just six projects basically in food and pottery sectors.

*Section B*

# **VIETNAM**

## **MARKET STUDY ON THE LEATHER INDUSTRY**

## 1.1 EXECUTIVE SUMMARY

- **COUNTRY REGULATIONS**

**Import-export activities** in Vietnam are regulated by the Government and they have an export and import substitution orientation. Almost all goods can be traded. however, some restrictions can temporarily be put in place.

**Customs regulations** are similar to those enforced in most other countries.

The import of machinery for industrial use normally enjoys a preferential treatment; second hand machinery is restricted and subject to special regulation.

**Foreign investment** is regulated by a very liberal law; incentives are very generous for producers who invest for export or produce intermediate goods to serve the domestic industry.

**Industrial activities** will be soon regulated by a new law that will level the playing field among different sectors encouraging non-State and small and medium enterprises.

**Distribution channels** in Vietnam are very fragmented; however, import-export activities are concentrated in the hands of big trading companies.

- **STATE OF INDUSTRY**

### **TANNING INDUSTRY**

The **geographical location** of the tanning sector is mainly the South (HoChiMinh City area), but there are some major producers in Hanoi, Vinh, Danang and other areas.

**Outline of the industry.** the sector is still inadequate to the demand and needs of the local industry because the production is limited and the quality not yet suitable to international standards.

The **raw materials supply** is still inadequate, as the animal husbandry sector is substandard; hides and skins are damaged and small in comparison to other countries.

The **current situation of the industry** is far from the optimum: the main producers are working at 50% of their capability.

The **processing capability** could be good, in presence of modern machinery in some factories; it would be over 20 square feet per year if the capacity could be exploited.

Among **major companies**, some have very modern, imported machinery, in part from Italy.

The **development plan** for the future includes investment to improve the quality.

### **LETAHER FOOTWEAR INDUSTRY**

The **geographical location** is around the main industrial hubs of the country: Hanoi and especially HoChiMinh City; however, there are some factories in other provinces.

The **current situation of the industry** is positive; footwear exports are among the main currency earners of Vietnam and the sector has been developing steadily, even if in the last two years it suffered from the impact of the crisis.

The **processing capability** is very good; several companies have modern plants and they have been expanding their production.

**Raw materials** are not available in sufficient quantity and quality on the local market, for this reason, most producers import them from abroad, mainly in the framework of production agreements.

**Major companies** have modern plants and machinery and they produce for the international market.

**In the future**, the industry wants to expand and increase the local content of its products, developing design and quality standards and reducing the dependence upon foreign contractors.

### **LEATHER GOODS INDUSTRY**

The industry is mainly **located** in HoChiMinh City; some other main companies are in Hanoi and Danang.

The **situation of the industry** is one of first steps of development; goods such as bags are mostly produced on contracts or for the domestic market; a considerable share of the production is carried out by families.

The **processing capability** is still very limited; the production is very scattered.

**Major companies** use foreign machinery, however, the amount of production is small.

### **UPHOLSTERY INDUSTRY**

The sector is not sufficiently developed yet.

#### **• STATE OF MARKET**

The **market features** are those of a huge market with a great potential in the future, however, at the moment the purchasing power is still limited.

**The local consumption** of leather is higher than the supply; for this reason, part of the leather must be imported.

**Forecasts for the local demand** show a steady growth in the future.

#### **• STATE OF COMPETITION**

**Main competitors** in all leather and footwear related sectors are recently industrialized Asian countries such as China, Indonesia and Thailand, however, Vietnam has a peculiar situation different from any other country.

The **options to penetrate the domestic market** include production on the place through contracts and joint ventures.

**Potential partners** are all main producers, who process, import and distribute materials and finished products.

**Distribution channels** are very fragmented regarding distribution to the great public, in case of instrumental goods, on the contrary, they are mainly big size trading companies.

## 2. COUNTRY REGULATIONS

### 2.1 Import and Export Activity

The Vietnamese foreign trade regime is still one of controls on imports, carried out through tariffs, quotas and even bans. These measures can be temporary and are subject to very frequent changes according to the situation of the trade balance and of the domestic industry.

As a matter of fact, Vietnam's economic policy is based on the substitution of imports when possible.

On the other side, Vietnam strongly encourages exports through privileges and incentives. Foreign investors who produce goods for exports enjoy preferential treatment.

Several international commitments such as the implementation of the ASEAN Free Trade Area requiring Vietnam to reduce all tariffs with member countries below 5% by the year 2006; the bid to join the WTO; the Trade Agreement with USA, conceding the Most Favoured Nation status to Vietnam; the agreement with the EU and various international pressures are pushing the country to slowly modify its policy in the direction of free trade and liberalization.

It is worth to notice that in 2006 Vietnam will be part of a vast free trade area, a market including 500 million people and one of the most dynamic areas in the world. Goods produced at low cost in Vietnam will be exported free of tariff to all ASEAN members.

To engage in international trade, Vietnamese companies must have an import-export licence issued by the Ministry of Trade. Contracts signed by any company who is not in possess of a licence are null and void.

Foreign trading companies can engage directly in international trade.

All goods can be imported to or exported from Vietnam in any quantity, with the exception of goods included in the following lists:

- 1) Goods not allowed to be traded:
  - a- Goods not allowed to be exported: weapons and related items, narcotics, toxic chemicals, antiques, wood of any kind, wild animals, rare and precious animals and plants.
  - b- Goods not allowed to be imported: weapons and related items, narcotics, toxic chemicals, pornographic and reactionary publications, firecrackers, toys negatively influencing education, social security and order, used consumer goods (excluding assets belonging to foreign diplomats and international organizations staff), right-handed vehicles, used spare parts of automobiles and motorbikes.
- 2) Goods subject to regulations:
  - a- Goods subject to export quotas, such as rice and some goods (e.g. garments) subject to quotas in the country of destination
  - b- Goods subject to import limitations: petrol, fertilizers, motorbikes and parts thereof, automobiles with less than 12 seats, iron and steel, cement, sugar, paper, liquors, construction glass, and other goods included in the Government list.



## 2.2 Customs regulation

To import goods into Vietnam, the following documentation is required:

- Import licence
- Commercial invoice
- Packing list
- Bill of lading
- Certificate of origin if applicable
- Declaration of the relevant Ministries in the case of goods subject to special regulations

Customs duties are calculated on the base of the quantity of goods as enumerated in the declaration form.

Import duties are based on the real purchase price at the destination port as stated in the contract/invoice; export duties are based on the real sale price at the destination port, excluding transport and insurance fees.

A minimum price stated in a list issued by the Ministry of Finance is applied if the goods are not in conformity with the conditions declared in the contract/invoice or if the declared value is lower than the price prescribed by the list.

The main barriers to international trade are actually non-tariff ones: both foreign and Vietnamese companies complain about cumbersome procedures, unclear legal framework, delays and unofficial costs.

A 10% Value Added Tax is imposed on the value of goods imported to Vietnam including the import tariff.

Some kinds of goods such as alcoholic beverages, cigarettes and tobaccos, cars, air conditioners, gasoline and other refined oil derivatives, playing cards and votive objects are subject to a luxury tax. The highest rate is 100%.

Goods exempted from import-export tariffs:

- Goods on transit
- Plant, machinery and specialized vehicles which are part of the assets of a joint venture enterprise or a business co-operation contract
- Raw materials and parts for the production of goods for export
- Temporarily imported goods for the exhibition at trade fairs

Goods enjoying special exemptions:

- Goods imported for use in the sectors of national security, defence, scientific research and didactic purposes
- Goods instrumental to joint venture enterprises and business co-operation contracts in areas or sectors where investment is particularly encouraged
- Goods donated by foreign organizations and individuals to Vietnamese organizations and individuals
- Goods damaged or reduced during the transport in proportion to the loss of value

Several kinds of machinery employed in the footwear industry enjoy a zero import tax rate:

### Machinery enjoying a zero import tax rate

Custom code	Machinery	Import tax rate
8452.10	Sewing machines used in the industrial production	
8452.21	Automatic sewing machines used in the industrial production	
8452.29	Other sewing machines	
8452.30	Sewing machine needles	
8452.4090	Fumitures, bases and covers for sewing machines and parts thereof (for industrial production)	
8452.9090	Other parts of sewing machines (for industrial production)	
8452.10	Machinery for preparing, tanning, processing hides, skins or leather	
8452.20	Machinery for making or preparing footwear	
8452.80	Other machinery	
8452.90	Parts of machinery	

The import of machinery is subject to the following regulation:

1) New machinery

The purchasing contract must mention the manufacturing date of the machinery/equipment. The Customs Department at the destination port will check such information comparing with the bill of lading/invoice.

2) Second hand machinery

According to the Decision N. 491/1998 of Ministry of Science, Technology and Environment (MOSTE), the remaining technical quality of the imported second hand machinery/equipment must be in any case more than 80% of the original level.

MOSTE regulates the acceptable quality level as described in the following table:

#### Acceptable quality level

Level	Extent of quality to be verified	Description
1	>90%-100%	<ul style="list-style-type: none"> <li>+ Machinery, equipment just transferred into operation and under good technical maintenance</li> <li>+ Major components and ancillary parts are complete, compared to technical catalogue. The parts of transmission and operation have no signs of wear</li> <li>+ The control system remains intact, ensuring its reliability and exactness when being run</li> <li>+ The operation process is normal, attaining the basic technical indices as required for the brand new machine</li> </ul>
2	>80%-90%	<ul style="list-style-type: none"> <li>+ Used machinery, equipment recently just reconditioned completely, being under operation</li> <li>+ The appearance looks fairly intact, no rust, with the original paint or new painting, ensuring the industrial beauty</li> <li>+ The major components and ancillary parts are complete (compared to technical catalogue), already reconditioned or replaced by the new ones. No clear signs of wear</li> <li>+ The control system remains intact, ensuring completely its operation functions</li> <li>+ The operation process is normal, meeting the demand of use</li> </ul>

The verification of the quality must be proceeded by a Vietnamese or foreign quality inspection organization registered in Vietnam, who undertakes the responsibility before a Vietnamese law court. The applicable cost of verification are as follows:

- From 0.1 to 0.15% of the total value of machinery/equipment when the verification is performed at the destination port
- 0.3% of the total value of machinery/equipment when the verification is performed at delivery port

## 2.3 Foreign Investments

The Vietnamese Government encourages foreign direct investment and allows it in all economic sectors, with the exception of some special cases where it could harm the national security, the environment, culture and tradition or historic vestiges.

**THE LAW FORBIDS THE EXPROPRIATION AND NATIONALIZATION OF FOREIGN INVESTED ENTERPRISES.**

Foreigners willing to invest in Vietnam have different options:

- 1) Joint venture: it is the most common form of foreign direct investment. The Vietnamese partner has the experience to deal with the local market and carry out bureaucratic procedures; normally, he also contributes in the form of land use rights and/or real estate, while the foreign partner contributes by capital, technologies and know-how. The minimum share for a foreign company in a joint venture is 30%; there is no maximum share. The law states that major decisions within the joint venture should be taken by qualified majority; moreover, the General Director or his deputy must be a Vietnamese citizen.
- 2) Business co-operation contract: this option does not constitute a new, autonomous legal subject, and it is rather a very flexible private agreement between the two partners. It is normally used in case of a co-operation limited in time, or as a prelude to a joint venture.
- 3) 100% foreign owned enterprise: it is allowed by the Vietnamese law, with the only restriction of some strategic sectors, for example those exploiting raw materials. Lately, some major joint ventures have been transformed in foreign owned companies.
- 4) Build Operate and Transfer projects: they are normally implemented in case of infrastructures. The foreign partner builds the infrastructure, he manages it until he recovers the capital plus an agreed amount of profit, then he transfers it to the Vietnamese authorities. Other versions of this formula are the Build, Transfer and Operate and the Build and Transfer contracts.

Licences for foreign direct investment projects under 5 million US dollars are issued by the local administration (People's Committee) of the Province where the investment takes place. Projects above 5 million dollars are licenced by the Ministry of Planning and Investment. The management board of Industrial Zones has the right to licence projects under 40 million dollars implemented in the Zone.

The application dossier must include:

Investment project including all data regarding the investor and the planned activity

Business co-operation or joint venture contract; company charter

Documentation proving the legal and financial status of the partners

Dossier regarding technology transfer if applicable

Environmental impact study

Land lease application with relevant data

Construction projects relevant to the investment

As a preliminary act towards the establishment of a direct investment project or simply to monitor the market, a foreign company can open a representative office. These offices do not have the right to engage in commercial activities, as they only have an explorative purpose. The fee to open a representative office is 70 US dollars; the licence can be obtained in 15 days with a simple application to the Ministry of Trade accompanied by documentation proving the existence and legal activity of the foreign company and the certified budget.

Foreign companies can also open a branch. The licence is also issued by the Ministry of Trade. Branch offices have the right to engage in commercial activities as stated in the licence.

The Vietnamese law strongly encourages foreign direct investment through remarkable privileges including fiscal holidays and reduced tax rates.

Among the main incentives, foreign invested companies can enjoy UP TO 8 YEARS FISCAL HOLIDAYS FROM THE FIRST REALIZATION OF PROFIT AND FURTHER TAX RATE REDUCTIONS IN THE FOLLOWING YEARS in case of specially encouraged projects.

The full tax rate is low: from 10% to 25% depending on the nature and location of the project.

Moreover, they enjoy reductions in the land use fee, privileges regarding the import of raw materials and machinery and other incentives.

PROFITS AND OTHER FORMS OF LEGAL INCOME CAN BE REPATRIATED; the profit repatriation tax can vary from 5% to 10% depending on the nature and location of the project. If profits are reinvested in Vietnam they are exempted from taxation.

The Vietnamese legal framework is very favourable to foreign investment. However, some difficulties remain, as some laws are not made clear yet; moreover, some procedures are still cumbersome.

Foreign entrepreneurs willing to fully take advantage of the new possibilities offered by this market are advised to rely on the services of public or private agencies with a good knowledge of the local business environment.

The following projects are presently specially encouraged by the Vietnamese law:

- 1) Projects exporting at least 80% of their production
- 2) Projects exporting at least 50% of their production and making intensive use of local labour and raw materials (value at least 30% of the production cost)
- 3) Projects investing in areas with difficult socio-economic conditions and
  - a- Exporting at least 50% of the production in the fields of breeding, planting and processing agricultural, forestry and aquacultural products
  - b- Exporting at least 50% of the production and employing at least 500 employees
  - c- Exporting at least 30% of the production and making intensive use of local raw materials (at least 30% of the production cost)
- 4) Projects producing mechanical, electric and electronic spare parts or accessories with high added value and intensive use of local raw materials
- 5) Projects processing minerals exploited in Vietnam

Recent announcements by the Vietnamese authorities declare that all projects exporting at least 30% of the production in favoured sectors can be eligible for maximum preferential treatment.

The law specifies sectors where the investment is encouraged and specially encouraged; lists are updated by the relevant Government agencies.

Generally speaking, all projects producing for export, creating jobs, processing raw materials or substituting imports have a strong likelihood to be eligible for maximum preferential treatment.

Among the sectors quoted by the law, the production of materials and parts for footwear is an encouraged sector.

## **2.4 Industrial activities**

Vietnam recognizes different kinds of industrial enterprises, including State owned enterprises at central level; State owned enterprises at local level; co-operatives and private enterprises.

Most industrial enterprises are presently State owned; private companies are in general very small, often at family level.

In the recent years, State owned companies in the same sector have been reorganized in Corporations. Such organizations act as an umbrella co-ordinating the activities of all members who are horizontally and vertically integrated; often, they also engage in direct production and trade activities and in joint ventures with foreign partners.

Foreign investment projects are regulated by the Law on Foreign Investment and successive amendments.

Industrial activities of Vietnamese enterprises are presently regulated by the Company Law and the Law on Private Enterprises of December, the 21<sup>st</sup> 1990, supplemented and amended on the 22<sup>nd</sup> of June, 1994.

However, a new Enterprise Law approved by the National Assembly on the 12<sup>th</sup> of June 1999 will be enforced on the 1<sup>st</sup> of January 2000; the new legislation is similar to those prevailing in most industrialized countries and it puts on the same level State Owned and non-State owned enterprises.

## **2.5 Distribution channels**

In Vietnam distribution is generally very fragmented and carried out by tiny shops and market vendors. Mass distribution exists only in the main urban centres such as Hanoi, HoChiMinh City and few others. In the same towns, luxury boutiques are mushrooming, while in the countryside where the biggest part of the Vietnamese population resides distribution is mainly carried out at street markets.

Trade by Internet (E-commerce) is being introduced, but the turnover is still extremely limited.

Consumers goods are generally traded by private businesses, while instrumental goods such as machinery and raw materials are often imported and distributed by big State owned trading companies.

Foreign invested enterprises registered in Vietnam can distribute their products on the local markets, while other foreign companies are not allowed to engage directly in distribution, and they must sign contracts with authorized Vietnam-based trading companies.

## **3. STATE OF THE INDUSTRY**

### **3.1 Tanning Industry**

The tanning industry in Vietnam is developing, but its production is still inadequate to the domestic demand. As a matter of fact, the quantity is still limited and most Vietnamese footwear producers are forced to import leather from abroad; moreover, the quality does not always reach the international standard.

One of the main problems is the raw materials supply: due to substandard cattle breeding techniques, Vietnamese hides are small and they must be mended before utilization; moreover, techniques and machinery used in slaughterhouses are obsolete.

Only cow and buffalo hides are used for tanning; while 18 million pigs are bred in Vietnam, their skin is not used while the country has to import pig skin from abroad.

In recent years, many Vietnamese tanning companies have been investing in equipment and machinery, reaching a fair quality level and increasing the production; some companies such as Saigon Leather Company and Meko are equipped with the most recent technologies. However, these companies are still enduring difficulties and they are not fully exploiting their capacity.

Several small private companies appear to be quite successful; some of them even produced for export to China.

Investment in tannery and in the production of other high quality footwear components is one of the biggest priorities of the Vietnamese leather and footwear sector and of the local authorities. Foreign investment in this sector enjoys special incentives and privileges, fiscal holidays, low tax rates and other advantages.

#### **3.1.1 Geographical location**

The tanning industry in Vietnam is mostly located in the area of HoChiMinh City; however, there are some companies in Hanoi and in other provinces of Vietnam.

Presently, there are 10 tanning companies in HoChiMinh City; 3 in Hanoi; 1 in Vinh (Nghe An province); 1 in Quang Nam- Danang; 1 in Thai Binh; 1 in Can Tho.

### 3.1.2 Raw materials supply and trade

The quantity and quality of the raw materials for the tanning industry, such as raw hides, depend on the development of the animal husbandry sector.

In order to develop animal breeding ensuring that it becomes a modern industry, the Vietnamese Government has been issuing several policies and incentives targeting farmers.

The present situation of the husbandry sector is as follows:

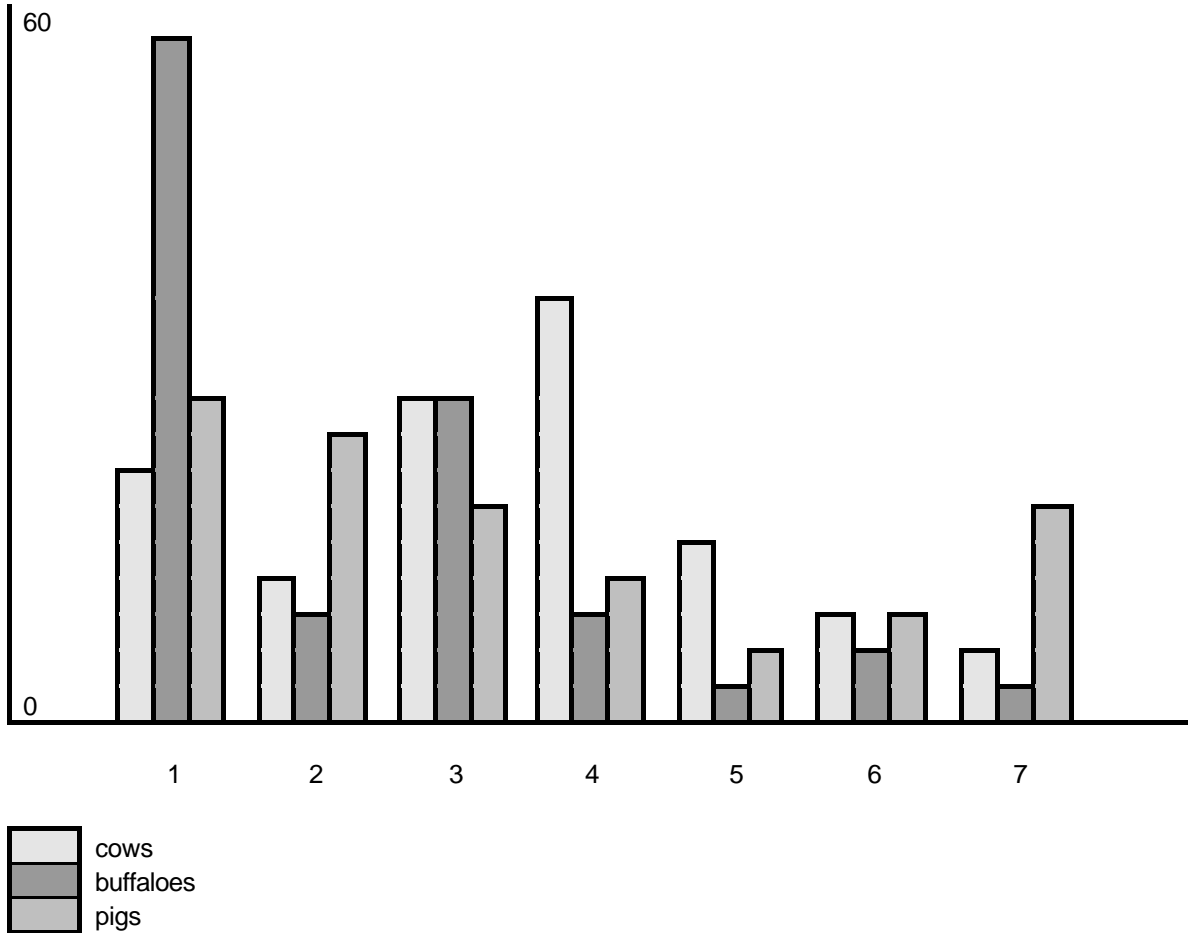
Animal husbandry in Vietnam is scattered and dispersed; it is mostly carried out by individual peasant families with backward technology. Only some government farms can boast modern technologies, but the quantity of livestock they breed is still limited. Mostly, they provide breeders to the farmers. However, the development of livestock has been steady. The growth rate has been high since 1990.

**Average growth of livestock**  
(Unit: 1000)

Year	Buffaloes	Cows	Pigs
1990	2,854.10	3,120.80	12,260.50
1991	2,855.60	3,151.00	12,183.20
1992	2,883.40	3,193.38	13,881.70
1993	2,960.80	3,353.00	14,873.90
1994	2,971.10	3,466.70	15,569.40
1995	2,963.10	3,638.70	16,307.40
1996	2,953.70	3,800.30	16,921.40
1997	2,940.00	3,900.00	17,600.00
Average growth (%)	0.58	3.37	5.62

Graphic 1 Distribution of buffalo, cow and pig breeding in Vietnam

- 1- Northern mountain and midland region
- 2- Red River delta
- 3- Northern midland
- 4- Sea-coast midland
- 5- Highlands
- 6- North-east
- 7- Mekong delta



Unit : %

region \ live stock	1	2	3	4	5	6	7
Cows	18.5	8.2	22.5	28.3	12.9	5.6	4.2
Buffaloes	54.7	7.2	22.5	5.2	2.4	4.2	3.8
Pigs	23.6	21.8	15.9	10.6	5.2	5.9	15.0



Before the introduction of the reform policy, slaughtering was carried out only at State owned slaughterhouses. Nowadays, butcheries are mostly privately owned and very small scale; especially in the countryside, they slaughter in average 1 to 10 cows per day; the process is carried out by hand.

The slaughtering rate is about 13-14% for buffaloes and cows; 90% for pigs.

*Quality of raw hides and total capacity:*

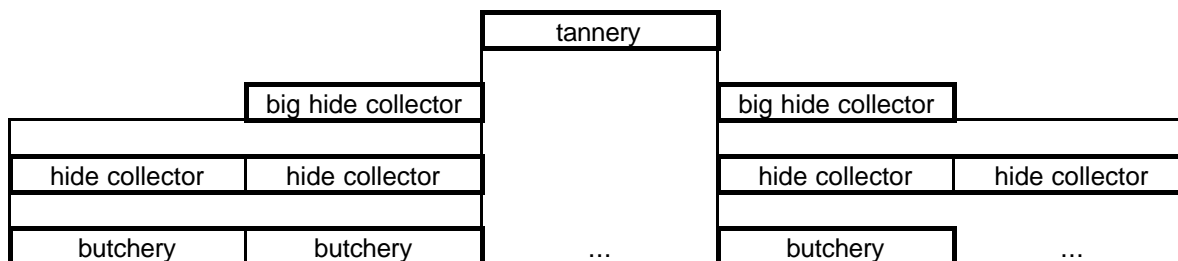
Vietnamese raw hides are in average low quality, due to obsolete animal husbandry technology. Slaughtering and flaying are very primitive; moreover, workers lack the knowledge about the preservation techniques for raw hides.

Vietnamese hides mostly present the following characteristics:

- Light weight (1997 average weight of wet salted hides: 13-15 kg/piece, 1991 average weight of salted hides 10-12 kg/piece)
- Several defects, such as scratches on the surface of the hide
- Knife scratches on the flesh side.
- Wet salted hides are red moulded and hair loosen
- Poor collection ability

The marketing price of raw hide is not stable, depending on tannery demand. Presently the price of wet salted hide is USD 0,6- 0,8/kg.

*The raw hides collection network in Vietnam can be described by the following pyramid:*



In the year 1997, 18.000 tones of buffalo and cow raw hides have been collected.

Normally in Vietnam pig skin is sold for meat; for this reason, local tanneries only manufacture sole, lining and upper leather from buffalo and cow skin.

Besides the problem regarding hides and skins, Vietnamese tanneries are forced to import most chemicals necessary for their activity. Only a few, such as sulphuric acid, sodium chloride, ammonium sulphate, lime, sodium carbonate, sodium bicarbonate and few others are available in Vietnam.

### 3.1.3 Current situation of the industry

1997 was a particularly bad year for the Vietnamese tanning industry; the total output was about 10 million square feet, and just 50% of the capacity of Vietnamese tanneries was utilized. The situation did not improve in 1998, when the production reached a similar amount. The difficult situation of the footwear sector, due in part to the regional crisis, reduced the demand domestically and abroad.

The local production is not enough to cover the demand of the footwear sector; most leather used in Vietnam is imported. On the other hand, most foreign contractors refuse to use local materials and they require the Vietnamese partner to import leather from abroad; in some cases they provide raw materials as part of the agreement. Ironically, while Vietnam has to import leather for its own companies, it exports 60% of its leather production to Thailand and China. The rest has a very low quality standard.

The dependence of the footwear sector on foreign contractors causes a main difficulty to Vietnamese tanneries, who are not encouraged to expand their production and invest in machinery, research and development.

However, some local tanneries have modern machinery, but the main problem is represented by the low quality of raw materials used to make leather, due to the low standard condition of animal husbandry.

Moreover, most chemicals used for making leather must be imported from international chemical companies such as BASF, Bayer, Cliant, Stahl etc. Only some chemicals, such as sulphuric acid, sodium chloride, ammonium sulphate, lime, sodium carbonate, sodium bicarbonate and few others are available in Vietnam.

### 3.1.4 Current processing capability

As recalled above, the Vietnamese tanning industry suffered in 1997 and 1998 and the capacity was not exploited (most companies were operating at a loss). In 1999, the total capacity of the sector will be 21-22 million square feet of leather.

The total workshop area reaches 30,500 sqm.

The main products include upper and lining leather.

**Production of the Vietnamese tanning industry  
(Sq.ft.)**

Products	Unit	1995	1996	1997
Grain	1000	3,884	5,805	7,936
Split leather	---	1,116	1,661	2,478
Wet blue	---	518	448	334
<b>Total</b>	---	<b>5,518</b>	<b>7,914</b>	<b>10,748</b>

### 3.1.5 Profiles of major companies

#### A. State-owned tanning enterprises:

1. Hanoi Leather and Footwear Company
2. Leather and Shoe Research Institute
3. Nghe An Tannery
4. Saigon Tanning Enterprise
5. Tam Ky Tannery
6. Thai Binh Tannery and Footwear Factory

#### B. Joint venture tanneries:

1. Leather Tannery & Leather products company (TAMICO, Ltd.)
2. Meko Leather Factory (MLF)
3. Trinity Joint Venture enterprise
4. Vissangens Leather Factory (MLF)

#### C. Private tanneries:

1. An Loi Tanning Unit
2. Dai Loi Tanning Unit
3. Dang Tu Ky Tanning Unit
4. Hiep Thanh Hung Tanning Unit
5. Hung Thai Tanning Unit
1. Vinh Phat Thanh Tanning Unit

Detailed profiles follow from next page.

A1

#### COMPANY DATA

Name of the company:	<b>Hanoi Leather and Footwear Co.</b>
Addresses	Premise No. 1: 151 Thuy Khue St., Ba Dinh district, Hanoi
	Premise No. 2: Tam Trinh St., Thanh Tri district, Hanoi
Tel.:	(844) 862 2255
Fax:	(844) 862 4811
Director:	Mr. Nguyen Van Ty
Year of establishment:	1912

#### PRODUCTION (key indicators)

Capital:	USD 1.8 million
Staff:	400 (Workers: 360; White collars: 40)
Type of hide processed:	Cattle and water buffalo hides.
Type of finished product: Full grain:	5%
	Corrected grain: 60%
	Split: 35%
Annual production:	1994: 400,000 sq. feet.
	1995: 500,000 sq. feet.

#### MACHINERY DESCRIPTION

Type	Amount	Manufacturer	Manufacturing date
Tanning drum:			
-3 m x 3 m	06	Locally made	1980
-1.8 m x 1.8 m	04	Locally made	1980
-Metallic, 2m x 2m	02	Hungary	1975
Fleshing machine, w w 3.2m	01	Svit, Czech	1975
Shaving machine, w w 3.2m	01	Svit, Czech	1975
Staking machine, w w 3.2m	01	Elektro-Praga, Czech	1979
Splitting machine, w w 3.2m	03	Hindustan Engineering, India	1991
Buffing machine, w w 0.2m	01	Svit, Czech	
Dusting machine, w w 2.2m	01	Svit, Czech	
Spraying cabin, w w 3.5m	01	Svit, Czech	1991
Spraying cabin, w w 2.2m	01	India	1991
Electric drying chamber (10m long, 4 m wide, 2.2m high; 20 plates)	01	India	
Electronic measuring, w w 2.2m	01	India	1991
Electronic measuring, w w 2.2m	01	Svit 103, Czech	1961

#### NOTES

<ul style="list-style-type: none"> <li>Tanning process being applied: This tanning company was established during the French colonial time, firstly equipped with French machinery, then Czech machinery in 1970s, Indian machinery in 1991. French tanning process was applied at the beginning for tanning shoe sole leather, then Czech technology was introduced.</li> </ul>
<ul style="list-style-type: none"> <li>Knowledge about Italian technology: The specialists in this company attended some short-term training courses organised by UNIDO. They have been rather familiar with and appreciated Italian technology</li> </ul>
<ul style="list-style-type: none"> <li>Since summer 1999, this company will specialize in canvas and ladies shoes.</li> </ul>

A2

## COMPANY DATA

Name of the company:	<b>Leather and Shoe Research Institute</b>
Address:	66C Hoang Hoa Tham St., Ba Dinh district, Hanoi
Tel.:	(844) 845 6841
Fax:	(844) 845 4214
Director:	Dr. Dang Tung
Year of establishment:	1973

## PRODUCTION (key indicators)

Staff:	32, of which 3 Masters and 26 university graduates.	
Business line:	Research on tanning technology and leather processing.	
Type of hide processed:	Cattle and water buffalo hides.	
Type of finished product:	Full grain:	7%
	Corrected grain:	60%
	Split:	23%

## MACHINERY DESCRIPTION

<i>Type</i>	<i>Amount</i>	<i>Manufacturer</i>
• Premise No. 1: Leather processing		
Tanning drum, 2 m x 2 m	04	Local made
Fleshing machine, 1.8 m w.w.	01	Polvara, Italy
Sammying machine, 1.8 m w.w.	01	Svit, Czech
Splitting machine, 1.8 m w.w.	01	Polvara, Italy
Shaving machine, 1.6 m w.w.	01	Polvara, Italy
Vacuum drier, 1 working table	01	Incoma, Italy
Staking machine, 1.6 m w.w.	01	Incoma, Italy
Polishing machine, 0.6 m w.w.	01	Cartigliano, Italy
Buffing machine, 0.8 m w.w.	01	Cartigliano, Italy
Setting out machine, 1.8 m w.w.	01	Cartigliano, Italy
Embossing machine, 550 tons	01	Mostardini
• Premise No. 2: Laboratory		
Strength tester	01	
Lastometer	01	
Bally penetrometer	01	
Rub Fastness tester	01	
Thermo tester	01	
Stainless steel experimental drum:		
- 0.6 m Ø x 1.2 m long	01	
- 0.3 m Ø x 0.6 m long	01	
Air compressor	01	

A3

COMPANY DATA

Name of the company:	<b>Nghe An Tannery Factory</b>
Address:	Block #3, Trung Do ward, Vinh town, Nghe An province
Tel.:	(8438) 844955 / 842695
Fax:	(8438) 842812
Director:	Mr. Phan Nhan Dong
Year of establishment:	October, 1991

PRODUCTION (key indicators)

Staff:	150 (15 white collars, 105 workers)
Business line:	Tanning, trading, importing chemicals, equipment.
Type of hide processed:	Cattle and water buffalo hides.
Type of finished product:	Wet blue bovine hide, boxcalf, crust leather, shoe sole.
Annual production:	1993: 450 tons wet blue hide.
	400,000 sq. feet finished leather.
	1994: 300 tons wet blue hide.
	200,000 sq. feet finished leather
	from 1995: temporarily closed down, due to lacking of working capital.

MACHINERY DESCRIPTION

Type	Amount	Manufacturer	Manufacturing date
Semicircular tannery drum, (10m3/drum used for refreshing, deliming)	04	Svit, MFD	1989
Tannery drum: -used for tanning, 8 m3/drum	03	Svit, MFD	1989
-used for fatliquoring, 4 m3/drum	03	Svit, MFD	1989
-used for softing, 3 m3/drum	02	Svit, MFD	1989
Fleshing machine, 2.7 m w.w.	01	Svit, MFD	1989
Sammying machine, 1.8 m w.w.	01	Svit, MFD	1989
Splitting machine, 2.7 m w.w.	01	Svit, MFD	1989
Shaving machine, 1.8 m w.w.	01	Svit, MFD	1989
Staking machine, 1.6 m w.w.	01	Molise, Italy	
Spraying cabin, 2 m w, 3 m long	01	Svit	
Steam boiler	01		

NOTES

- This company received the leather production lines from Hanoi Leather and Footwear company; it will soon put it into operation.

A4

## COMPANY DATA

Name of company:	<b>Saigon Tanning enterprise (LEASGO)</b>
Address:	383 - 391 Ben Phu Lam St., ward 9, district 6, Ho Chi Minh City
Tel.:	(848) 8550 352
Fax:	(848) 8290 897
Director:	Mr. Le Van Khien
Year of establishment:	1965

## PRODUCTION (key indicators)

Capital:	USD 6 million (value of Italian machinery USD 4.5 million)
Staff:	400 (white collars 20, workers 380)
Type of hide processed:	Cattle and water buffalo hides
Type of finished product:	Full grain hide: 20%
	Corrected hide. 40%
	Split hide. 40%
Annual production:	3 million sq. feet of finished leather.

## MACHINERY DESCRIPTION

Type	Amount	Manufacturer
• Premise No. 1		
Tannery drum, 3.5m x 3.5m:		
-used for soaking, unhairing	06	Pajusco
-used for liming, tanning	03	Pajusco
Fleshing machine, 2.7m w.w.	01	Rizzi
Splitting machine, 3.0 m	01	Rizzi
Roller sammying machine, 2.7m w w	01	Rizzi
Through-feed sammying machine, 3m w w	01	Rizzi
• Premise No. 2		
Tannery drum:		
-used for retanning, fatliquoring, 3m x 2m	01	Pajusco
-used for drying, softing, 3m x 2.5m	03	Pajusco
Splitting machine, 3.0 m	01	Rizzi
Shaving machine, 1.7m	02	Rizzi
Setting-out machine, 3.0m w.w.	01	Rizzi
Polishing machine, 1.5m w.w	03	Ficini
Buffing & Dedusting machine, 1.9m w w	02	Ficini
Staking machine, 1.8m w.w.	01	Baggio
Embossing machine, 850 tons, 1370 x 1000	01	Tomboni
Auto spraying & drying line, 2m w w	02	Rotopress
Roller Ironing machine, 1.5m w w	01	Rotopress
Pole drier (12m long, 4.6m wide, 3.2m high; 120 poles) hides are left here for drying in 1 - 2 hours	01	Vecom Essiccatoi
Curtain coating machine (1.8m wide, 8-10 meter long)	01	Bruno Pellizzato
Electronic measuring, 2.4m w w	01	Ciak srl.
Compressor, GA 30, 7.5	03	Atlas Copco

A5

## COMPANY DATA

Name of the company:	<b>Tam Ky Tannery</b>
Address:	954 Phan Chu Trinh St., Tam Ky district, Quang Nam, Da Nang
Tel.:	(8451) 851 411
Fax:	(848) 8601 066
Director:	Mr. Nguyen Van Hanh
Year of establishment:	1983

## PRODUCTION (key indicators)

Capital:	USD 300,000
Staff:	42 (Workers: 7; White collars: 35)
Business line:	Tanning hides.
Type of hide processed:	Cattle (70%) and water buffalo (30%) hides
Type of finished product:	Full grain hide: 8%
	Corrected hide. 62%
	Split hide. 30%
Annual production:	1994: 250,000 square feet.
	1995: 300,000 square feet.
Annual production capacity:	480,000 - 500,00 square feet.

## MACHINERY DESCRIPTION

<i>Type</i>	<i>Amount</i>	<i>Manufacturer</i>	<i>Manufacturing date</i>
Tannery drum:			
-2 m Ø x 2 m long	01	Local made	
-3.5 m Ø x 3.5 m long	01	Local made	
Fleshing machine, 2.1 m w.w	01	Mercier Frères	1990
Splitting machine, 1.85 m w.w.	01	Mercier Frères	1990
Splitting machine, 2.7 m w.w.	01	Svit	1986
Shaving machine, 2.7 m w.w	01	Svit	
Sammying machine, 1.8m w.w	02	Mercier Frères	1990
Shaving machine:			
-0.6 m w.w	01	Svit	
-0.5 m w.w	01	Svit	
Buffing machine, 0.25 m w.w	01	Mercier Frères	
Setting-out machine	01		
Staking machine, 1.8 m w.w	01	Svit	
Embossing machine, 1.2 ton (0.6 m wide, 1.3 m long)	01	Singh, Calcutta	
Spraying cabin, (2 m wide, 3 m long)	01	Svit	



A6

COMPANY DATA

Name of the company:	<b>Thai Binh Tannery and Footwear Factory</b>
Address:	53 National Road No. 10, Phu Khanh ward, Thai Binh, Thai Binh prov.
Tel.:	(8436 ) 831 596
Fax:	(8436) 836 222
Director:	Mr. Nguyen Ngoc Khien
Year of establishment:	1978

PRODUCTION (key indicators)

Capital:	USD 170,000
Staff:	310 (Workers: 290; White collar: 20)
Business line:	Tannery and leather goods processing.
Type of hide processed:	Split leather imported from Italy.
Type of finished product:	Shoes upper leather, Gloves used for labour protection. Soft leather used for garment, gloves,
Annual production:	1994: 100,000 m2 of shoe upper leather 150,000 glove pairs produced
	1995: 250,000 glove pairs.
Current production capacity:	50,000 glove pairs per month.

MACHINERY DESCRIPTION

<i>Type</i>	<i>Amount</i>	<i>Manufacturer</i>
Tanning drum, 2.2 m x 2.2 m	07	Local made
Fleshing machine, 2 m w.w.	02	Svit, Czech
Sammying machine, 1.8 m w.w.	01	Svit, Czech
Shaving machine, 1.6 m w.w.	01	Svit, Czech
Staking machine, 1.6 m w.w.	01	Svit, Czech
Polishing machine, 0.6 m w.w.	01	Svit, Czech
Spraying cabin, 2.8 m w.w.	02	Svit, Czech
Pole drier, 20 poles	01	Local made
Embossing machine, 0.8 m w.w	01	India

B1

COMPANY DATA

Name of the company:	<b>Leather tannery &amp; Leather products company (TAMICO, Ltd)</b>
Address:	46/1 Au Co St., Tan Binh district, Ho Chi Minh city
Tel.:	(848) 8656 436
Fax:	(848) 8650 320
Director:	Mr. Nguyen Duc Than
Year of establishment:	1991

PRODUCTION (key indicators)

Capital:	USD 300,000
Staff:	100 (white collars: 10; workers: 90)
Type of hide processed:	Water buffalo hides
Type of finished product:	Full grain: 35%
	Corrected: 65%
Production/month:	30,000 - 35,000 sq.f. of crust leather
	20,000 - 25,000 sq.f. of coated leather
	20,000 sq. f of coated leather for local processing
Market:	Local: 0%
	International: Japan (70%), Korea, Taiwan.

MACHINERY DESCRIPTION

<i>Type</i>	<i>Amount</i>	<i>Manufacturer</i>
Tannery drums:		
-3.5m x 3.5m	05	Sangok, Korea
-2 m x 2 m	03	Sangok, Korea
Splitting machine, 3.0 m	01	Sangok, Korea
Shaving machines:		
-1.0 m	01	Universal, Taiwan
-1.0 m	01	Sangok, Korea
Sammying machine, 2.5 m	02	Local made
Ironing machine, 3.0 m	01	Sangok, Korea
Buffing machines:		
-1.0 m	01	Sangok, Korea
-1.0 m	01	Universal, Taiwan
Staking machine, 1.0 m	01	Universal, Taiwan

B2

COMPANY DATA

Name of the company:	<b>Meko Leather Factory (MLF)</b>
Address:	2 Le Hong Phong St., Can Tho city (Mekong delta)
Tel.:	(8471) 821 584, 841 269
Fax:	(8471) 841 270
Director:	Mr. Le Ngoc Thanh
Year of establishment:	1989

PRODUCTION (key indicators)

Capital:	USD 1.6 million
Staff:	136 (Workers: 115; White collars: 21)
Type of hide processed:	Cattle and water buffalo hides.
Type of finished product:	Wet blue, Crust and finished leather for shoe upper, handbag, sofa cover
Processing details:	Following German technology.
Annual production:	1993: 3 million sq. feet of wet blue, 1 million sq. feet of crust leather.
	1994:2.5 sq. feet of wet blue, 0.6 million sq. feet of leather
	1995:3 million sq. feet of wet blue, 1.2 million sq. feet of crust leather
Market:	Local: 40% quantity of finished leather International: Japan (wet blue and finished leather), Hong Kong, Taiwan, Korea, Malaysia Sincere Co., Ltd. (Hong Kong) is the permanent customer.
	South

MACHINERY DESCRIPTION

Type	Amount	Manufacturer
• Premise No. 1		
Fleshing machine,	01	Italy
Sammying machine,	01	Italy
Splitting machine,	01	Italy
Shaving machine	01	Italy
Setting out machine	01	Italy
Buffing machine	01	Taiwan
Staking machine	01	Taiwan
Embossing machine	01	Taiwan

## COMPANY DATA

Name of the company:	<b>Trinity joint venture enterprise (Trieu Canh Tannery factory)</b>
Address:	Premise No. 1: 213/58B Hoa Binh St., Tan Binh district, Hochiminh city
	Premise No. 2: 6/3 Hamlet No. 6., Binh Hung Hoa village, Binh Chanh district, Hochiminh city
Tel.:	(848) 865 3297/ 825 2370
Director:	Mr. Luc Canh Tu
Year of establishment:	4 June, 1992

## PRODUCTION (key indicators)

Investment capital:	USD 1,000,000.
Vietnamese partner:	Trieu Canh Garment Co., Ltd. (32 % equity)
Foreign partner:	Luen Cheong Glove Factory (68% equity), Unit 7-8 (2 F.), Hiyip Ing. Bldg. Lot 369, Hiyip St., Yuen Long NT. Hong Kong.
Staff:	70 (White collars: 7; Workers: 63)
Business line:	Tannery and production of work gloves.
Type of hide processed:	Split hide imported from abroad.
Annual production:	700,000 pairs of work gloves (USD 2.3 /pair)

## MACHINERY DESCRIPTION

<i>Type</i>	<i>Amount</i>	<i>Manufacturer</i>
Tannery drums:		
-2.2m Ø x 2.5 m	05	Local made
-3 m Ø x 3 m	06	Local made
Shaving machine, 0.6 m w. w.	09	Chang Yang, China
Fleshing machine, 2.2 m w.w.	01	Chang Yang, China
Sammying machine, 1.2m w.w	01	Chang Yang, China
Splitting machine, 2.m w. w.	01	Chang Yang, China
Buffing machine, 0.6 m w.w.	09	Chang Yang, China
Staking machine, old model	01	Chang Yang, China

B4

COMPANY DATA

Name of the company:	<b>Vissangens Leather Factory (MLF)</b>
Address:	420 No Trang Long St., Binh Thanh district, Hochiminh city
Tel.:	(848) 894 2779
Fax:	(848) 894 2775
Director:	Mr. Chan Chung Kit
Vice Director:	Mr. Nguyen Vinh Khanh
Year of establishment:	1991

PRODUCTION (key indicators)

Vietnamese partner:	Vissan Meat Processing corporation
Foreign partner:	Genscore Industries Ltd., 8/F., Hermes Commercial Centre, 4-4A Hillwood Rd., Tsim sha tsui, Kowloon, Hong Kong
Capital:	USD 400,000 (not including USD 400,000, i.e value of sewing plant)
Staff:	54 (Workers: 50; White collars: 4)
Business line:	Production of gloves for labour protection.
Type of hide processed:	Cattle hide, split hide imported from abroad.
Type of finished product:	Wet blue, Crust and finished leather.
Annual production:	1993: 400,000 pairs of work gloves
	1994: 420,000 pairs
	1995: 450,000 pairs
	(Price: USD 1.5 / pair)
Market:	International (Hong Kong, Korea)

MACHINERY DESCRIPTION

<i>Type</i>	<i>Amount</i>	<i>Manufacturer</i>
Tannery drums:		
-2 m Ø x 3 m	05	Local made
-1.2 m Ø x 1.5 m	03	Local made
Splitting machine, 2.5 m. w w	01	Tianjin GJ2A4 (Taiwan)
Shaving machines:		
-2.5 m. w w	01	Tianjin GJ2E3 (Taiwan)
-2.5 m. w w	01	Sangok (Korea)
-0.4 m w w	04	Taiwan
Staking machine	01	Sangok (Korea)
Frame toggling:		
-10 x 2 plates	01	Taiwan
-20 x 2 plates	01	Taiwan
Sprayer	02	
Air compressor	01	

C1

COMPANY DATA

Name of company:	<b>An Loi Tannery Factory</b>	
Shop:	543B Hoa Hao St., district 11, Hochiminh city	
Factory:	67/13 Au Co St., Tan Binh district, Hochiminh city	
Tel.:	(848) 865 3702	Fax: (848) 8298 540
Director:	Mr. Ly Xay Ha (Con)	
Year of establishment:	1960	

PRODUCTION (key indicators)

Staff:	10
Capital:	USD 10,000
Business line:	Leather shoe sole tanning.
Type of hide processed:	Cattle, water buffalo hides.
Type of finished product:	Crust, Coated hide (as per customer' s requirement)
Annual production:	100,000 sq.feet of sole leather /year

NOTES

<ul style="list-style-type: none"><li>• This is a typical tannery in Phu Tho village, specialised in tanning leather outer soles. The tanning profession has been inherited from the ancestors.</li></ul>
<ul style="list-style-type: none"><li>• This tannery permanently supplies outer sole to the only army footwear manufacturing company in the South of Vietnam, reaching the amount of 5,000 to 10,000 square feet/order.</li></ul>
<ul style="list-style-type: none"><li>• The company also operates a shop trading in local processed and imported leather.</li></ul>
<ul style="list-style-type: none"><li>• Tanning process: The process is made on the basis of manual work; 4 basins (dimension: 2 meter x 3 meter x 4 meter) are used instead of tannery drum; tanning process lasts 10 - 15 days.</li></ul>

## C2

## COMPANY DATA

Name of company:	<b>Dai Loi Tannery</b>
Address:	Lam Du ward, Gia Lam district, Hanoi
Tel.:	(844) 873 0352
Fax:	(844) 827 1866
Director:	Mr. Bui Ngoc Nhu
Year of establishment:	1993

## PRODUCTION (key indicators)

Staff:	16
Capital:	USD 20,000
Business line:	Tannery.
Type of hide processed:	Cattle, Pig and water buffalo hides.
Type of finished product:	Full grain: 6%
	Corrected grain: 50%
	Split leather 44%
Annual production:	200,000 sq. feet of leather.

## MACHINERY DESCRIPTION

<i>Type</i>	<i>Amount</i>	<i>Manufacturer</i>
Tanning drum, 2 m x 2 m	08	Local made
Steel tanning drum, 2 m x 1.8 m	02	China
Splitting machine, 1.8 m w.w.	01	China
Shaving machine, 0.6 m w.w.	02	China
Embossing machine, 0.8 m x 0.8 m	01	China
Pole drier, 10 poles	01	China
Spraying line	01	China

### C3

#### COMPANY DATA

Name of company:	<b>Dang Tu Ky Tannery</b>
Address:	41/11 Au Co St., Ward 9, Tan Binh district, Ho Chi Minh city
Tel.:	(848) 8653 028/ 0908 03328 (Mobile phone)
Director:	Mr. Dang Quoc Cuong
Year of establishment:	1982

#### PRODUCTION (key indicators)

Capital:	USD 450,000
Staff:	60, including 58 workers.
Type of hide processed:	Cattle and water buffalo hides
Type of finished product:	Finished leather for domestic consumption market.
Annual production:	Consuming 3 tons of salted hide; 4,500 square feet of processed leather/day

#### MACHINERY DESCRIPTION

<i>Type</i>	<i>Amount</i>	<i>Manufacturer</i>	
Tannery drums:			
-drums 2.5 m Ø x 2.8 m long (used for liming, tanning)	06	Local made	
-drums 1.5 m Ø x 1.8 m long (used for fatliquoring, dyeing)	02	Local made	
-drums 1.8 m Ø x 2.2 m long (used for milling)	02	Local made	
Splitting machine, 1.8 m w. w.	01	Svit, Czech, MFD	1989
Shaving machines:			
-0.45 m w.w.	01	Taiwan	
- 1.2 m w.w.	01	Taiwan	
Buffing machine, 1.5 m w. w.	01	Taiwan	
Sammying machine, 1.8 m w. w.	01	Svit, Czech, MFD	1989
Setting-out machine, 3.0 m w. w.	01	Taiwan	
Vacuum drier, 2 plates	01	Shanghai (Chang Yang)	
Staking machine, 1.5 meter w. w.	01	Taiwan	
Buffing machine, 1.5 meter w. w.	01	Taiwan	
Embossing machine, 500 tons	02	Taiwan	
Roller coating machine, 1.8 m w. w.	01	Taiwan	
• Development plan: (to purchase)			
Roller coating machine	01	Italy	
Auto spraying machine	01	Italy	

#### NOTES

<ul style="list-style-type: none"> <li>This is one of the most powerfully-financed tanneries in Hochiminh city. From the end of 1995 until now, the tannery has invested more than USD 200,000 in tanning machinery.</li> </ul>
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## C4

### COMPANY DATA

Name of company:	<b>Hiep Thanh Hung Tannery Factory</b>
Address:	157 Au Co St., Ward 9, district 11, Ho Chi Minh city
Tel.:	(848) 865 4942
Director:	Mr. Huynh Chieu Thanh (he is a member of some Management Boards of commercial banks)
Year of establishment:	1989

### PRODUCTION (key indicators)

Registered capital:	USD 40,000
Staff:	15
Business line:	Tanning, banking activities, trading chemicals used for tanning, textile.
Type of hide processed:	Cattle and water buffalo hides
Type of finished product:	Finished leather for domestic consumption market.

### MACHINERY DESCRIPTION

<i>Type</i>	<i>Amount</i>	<i>Manufacturer</i>
Tannery drums:		
- 2.5 m Ø x 2.8 m long (used for liming, tanning)	02	Local made
- 1.5 m Ø x 1.8 m long (used for fatliquoring, dyeing)	01	Local made
- 1.8 m Ø x 2.2 m long (used for milling)	01	Local made
Splitting machine, 1.8 m w. w.	01	Svit, Czech
Shaving machine, 1.2 m w.w.	01	Taiwan

### NOTES

<ul style="list-style-type: none"> <li>This is one of the most powerfully-financed tanneries in Hochiminh city.</li> </ul>
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## C5

## COMPANY DATA

Name of company:	<b>Hung Thai Tannery</b>
Address:	195 Au Co St., Ward 5, district 11, Ho Chi Minh city
Tel.:	(848) 8657 690
Fax:	(848) 8601 066
Director:	Mr. Ly Ngau
Year of establishment:	1984

## PRODUCTION (key indicators)

Capital:	USD 450,000
Staff:	82 (Workers: 67; White collars: 05)
Business line:	Tanning hides.
Type of hide processed:	Cattle and water buffalo hides
Type of finished product: Full grain:	1.6 millimeter thick upwards
	Corrected grain. 1.6 millimeter thick upwards
	Split leather. 0.8 millimeter downwards
	Nabuck: 2 millimeter upwards
Annual production:	1993: 400,000 square feet.
	1994: 700,000 square feet.
	1995: 1,200,000 square feet.

## MACHINERY DESCRIPTION

Type	Amount	Manufacturer	Manufacturing date
Tannery drum (2.4 m Ø x 2.4 m long)	18	Local made	
Splitting machine	01	Taiwan	
Sammying machine	02	Taiwan	
Shaving machine	04	Svit, MFD	1989
Buffing machine	03	Taiwan	
Setting-out machine	01	Svit, MFD	1989
Staking machine	01	Cartigliano	1996
Embossing machine (550 tons, 1370 x 1000)	01	Mostardini, Italy	1996
Roller coating machine	01	Cartigliano	1996
Vacuum drier	01		1996
Painting machine	01	Cartigliano	1996
Steam boiler	01		

## NOTES

- This is the most powerfully-financed tannery in Hochiminh city. From the end of 1995 until now, the tannery has invested more than USD 250,000 in renovating, upgrading production by Italian tanning machinery.

C6

COMPANY DATA

Name of company:	<b>Vinh Phat Thanh Tannery Factory</b>
Address:	43/1 Au Co St., Ward 9, Tan Binh district
Tel.:	(848) 8654 757
Fax:	(848) 829 8240
Director:	Mr. Tran Ha
Year of establishment:	1981

PRODUCTION (key indicators)

Capital:	USD 30,000
Staff:	10
Business line:	Tannery
Type of hide processed:	Cattle and water buffalo hides.
Type of finished product:	Finished leather for domestic consumption market.
Annual production:	400,000 sq. Feet of finished leather.

MACHINERY DESCRIPTION

<i>Type</i>	<i>Amount</i>	<i>Manufacturer</i>	<i>Manufacturing date</i>
Tannery drum (2.4 m Ø x 2.4 m long)	04	Local made	
Splitting machine	01	Taiwan	
Sammying machine	01	Taiwan	
Shaving machine	02	Taiwan	
Buffing machine	02	Taiwan	
Setting-out machine	01	Svit, MFD	1989
Staking machine	01	Taiwan	

NOTES

- This company has been selected by Smit & Zoon Co.(Netherlands) to be their sole agent in Vietnam, to promote the using of tanning chemicals of Smit & Zoon.

### 3.1.5.1 Specific production profile of some main companies

#### Hanoi Leather and Footwear company

Hanoi shoes and leather company used to be the main tanning company in the north and the oldest of Vietnam, as it was established in 1912.

The total capital of the company is VND 20.8 billion.

Machines and equipment used are from 1970-1980, they are made in Czechoslovakia and India. Drums are made in Vietnam. The plant is not synchronous and some machines are lacking especially in the finishing step.

This company used to manufacture cheap leather for the local market, including the Army. However, it was not able to penetrate the international market or supply high quality footwear products, as the production standard is quite low.

According to Vietnam National Leather and Footwear corporation (Leaprodexim Vietnam), in July 1999 the company stopped producing leather to specialize on the production of canvas shoes.

All equipment and machinery for the production of leather were transferred to Nghe An tannery.

#### *Hanoi Leather and Footwear co. profile*

Product	Unit	Before 1985	1995	1996	1997	1998
- Light leather	mil sqft	1.40	0.434	0.349	0.266	0.182
+ from pig skin	---	0.30				
+ from buffalo & cattle hides	---	1.10	0.434	0.349	0.266	0.182
- Heavy leather	tons	140	19.300	10.300	3.000	2.600
- Zelatin glue	---	100	9.300	6.800		

#### Nghe An tannery

This company was established in 1992 and provided with Czechoslovakian made equipment and machinery, but it never started its activity, because it was designed to process leather from pig skin.

The company should become a main center for the production of leather in the future, when it will put into operation the machinery received from the Hanoi Leather and Footwear company. Moreover, Nghe An Tannery will import new Italian machinery worth about 800,000 US dollars.

#### Tam Ky Tannery

This company was established in 1986 and equipped with Czech- and French made machinery, but the plant is not synchronous and it lacks several machines.

However, the company is trying its best to increase the quality of its product to export to the Japanese market.

The present exported quantity reaches about 20.000 sqft per month.

This company is one of the few who fully exploits its capacity.

#### *Development of Tam Ky Tannery*

Products	Unit	1993	1994	1995	1996	1997	1998
Wet blue	1000 sqft	150					
Crust	---		60				
Finished leather				50	60	80	110

From 1997 the whole finished leather production is exported to Japan.

### Saigon Tannery

It is the biggest tannery in Vietnam and a model company. In 1992 it has been equipped with synchronous machines from Italy worth USD 5.4 million.

The global capacity reaches 4 million sqft of leather.

The main products include upper leather and lining leather, besides a limited amount of belt leather. In 1998, the company manufactured 2.2 millions sqft of leather.

**Production of Saigon tannery**

Products	Unit	Before 1990	1995	1996	1997	1998
Light leather	1000 sqft	646 (1982)	1.157	1.915	2.259	2.200
Heavy leather	tons	20				
- Market	1000 sqft					
+ Domestic	---	646	961	933		
+ Export			196	982	2.259	2.200

### **3.1.6 Development plan of the industry in the future**

From 2000 to 2010, the tanning industry will step by step improve both quality and quantity of leather in order to supply materials for shoes factories and gradually prepare to substitute imported leather. In the year 2000, the Vietnamese tanning industry will aim to exploit its whole manufacturing capacity, worth 20 million sqft.

Moreover, investment will be carried out to increase the production and to improve the quality of animal breeding designed to provide raw materials to the tanning sector.

Plan for the future production of leather:

**Future production of leather**

Year	2005	2010
Production	40 million sqft	80 million sqft

Most investment will be carried out in the Center and South of the country.

## **3.2 LEATHER FOOTWEAR INDUSTRY**

### **3.2.1 Geographical location**

Like in the case of all other economic sectors in Vietnam, the footwear industry is mainly located around the two industrial hubs of the country, Hanoi and HoChiMinh City and in the surrounding provinces.

In the North, besides Hanoi, the provinces where the development of the footwear industry is particularly relevant are Haiphong, Hai Duong and Ha Tay; In the South, besides HoChiMinh City, the provinces of Binh Duong, Dong Nai, Ba Ria-Vung Tau and Can Tho.

Some other enterprises are scattered in central and coastal provinces such as Hue, Danang, Khanh Hoa and in the province of Tay Ninh.

Of the 67 members of the Vietnam Leather and Footwear Association, 19 are located in Hanoi; 2 in Ha Tay; 10 in Haiphong; 5 in Hai Duong; 1 in Thai Binh; 1 in Vinh Phuc; 1 in Phu Tho; 1 in Hue; 2 in Danang; 19 in HoChiMinh City; 3 in Binh Duong; 1 in Can Tho; 1 in Vung Tau; 1 in Nha Trang.

Among other companies who are not members of the Association, 4 are in Hanoi; 2 in Ha Tay; 1 in Haiphong; 1 in Vinh Phuc; 1 in Binh Dinh; 3 in Ba Ria-Vung Tau; 16 in HoChiMinh City; 2 in Can Tho; 1 in Dong Nai; 3 in Tay Ninh; 3 in Binh Duong; 1 in Vinh Long; 3 in Long An.

Of the 51 foreign invested enterprises quoted, 1 is in Hanoi; 2 in Haiphong; 1 in Nghe An; 1 in Danang; 25 in HoChiMinh City; 12 in Dong Nai; 7 in Binh Duong; 1 in Long An.

### **3.2.2 Current situation of the industry**

The footwear industry in Vietnam has been developing very fast over the last 10 years, and it is one of the nation's main foreign currency earners.

In the 80's, the sector had a remarkable growth especially regarding the production and quantity of exported items, although the quality and differentiation of the products were not particularly strong. Trade was carried out with the former Soviet Union and other COMECON countries. After the collapse of the Soviet block, at the beginning of the 90's, the Vietnamese footwear industry suffered a heavy crisis because of the loss of the traditional market and the inadequacy to compete in the developed markets yet.

However, with the implementation of the reform policy, the industry started to recover. Increased investment, both from foreign and domestic sources, improved the standard of the production, multiplied the capacity and contributed to find new markets.

Presently, in Vietnam there are 154 footwear producing companies, 67 of which are State owned, holding 27% of the total investment capital and responsible for 34-35% of the productive capacity; 34 are non-State owned, responsible for 19.5% of the production and 53 are foreign invested enterprises responsible for about 46% of the production. The number does not include tiny family scale businesses. The sector employs 276'000 workers, not including thousands of small family shoemakers.

Between 1993 and 1997, the footwear industry in Vietnam registered a very strong growth. Over this five years period, the export goods productivity growth was in average 30%, and the export turnover growth was 70%. In 1997, the sector reached an export turnover of 964 million dollar, a 80.5% growth over 1996.

However, the sector was hit by the Asian crisis in 1998 and the growth slowed down; the turnover reached 1 billion dollar, a 3.8% growth over 1997, far below the target of 1.2 billion dollar. In the same year, Vietnamese companies operated at 60% of their capacity. The amount of shoes and sandals exported by Vietnam in 1998 was 185.5 million pairs, a 5.5% growth over 1997. The goods were mainly exported to the European Union and East Asia; footwear worth about 100 million US\$ were exported to the US and Canadian markets.

The reason of the slowdown was the loss of competitiveness suffered by the Vietnamese companies in comparison to the other ASEAN competitors such as Thailand and Indonesia, who could reduce the cost of their products thanks to the devaluation of the currency. Moreover, some major customers such as South Korea and Japan, hardly hit by the economic and financial crisis, had to reduce their overall imports. The import of Vietnamese footwear by these two countries in 1998 decreased by 30-40%.

Finally, Vietnam does not enjoy yet the Most Favoured Nation status regarding exports to the American market. Vietnamese footwear bears a 22% import tax, while similar products exported by other Asian countries enjoy a 8% tax. The trade agreement between Vietnam and the USA should be ratified soon; it will open a huge market to the Vietnamese producers. The percentage of the 1998 export turnover realized by domestic invested companies is 58.6%, while the rest has been realized by foreign invested enterprises (in form of joint ventures and business co-operation contracts).

The plan for 1999 aims at producing 220-225 million pairs of shoes and sandals to reach an export turnover of 1.1-1.15 billion dollar. The industry should operate at 70-75% of its capacity, trying to improve the quality of its products and to obtain ISO 9000 certifications where possible.

The main problem limiting the development of the sector is the lack of capital. Many enterprises still use obsolete machinery greatly affecting the productivity and quality of the footwear. The per capita value of plants and machinery in Vietnamese owned enterprises is only 35% of the same value in foreign invested enterprises in the country. Moreover, local enterprises lack experience regarding international markets and fashion; they lack creativeness in design and original ideas for their products.

Only 20% of the workers in the sector have been trained at technical and vocational schools; the others have been trained directly on the production line.

Most Vietnamese companies produce on contract for foreign partners who worry about market research and commercialization; themselves, they only act as assembly lines. The production focuses on exports, while the domestic market is flooded with cheap imports from neighbouring countries.

Another main problem limiting the development of the industry is the dependence upon imported raw materials, who are bought at expensive prices. One of the decisive factors to develop the domestic sector will be the availability of local raw materials.

### Ownership structure

Ownership	Number of companies	Number of employees	Production capacity (million pairs)
<b>State owned</b>	<b>67</b>	<b>83,580</b>	<b>125,650</b>
■ central	25	35,280	
■ local	42	48,300	
<b>Non-State owned</b>	<b>34</b>	<b>81,960</b>	<b>70,550</b>
■ Limited co.	28		
■ Joint stock co.	02		
■ Private co.	04	38,700	
<b>Foreign invested</b>	<b>53</b>	<b>110,460</b>	<b>166,524</b>
■ Joint ventures	14	15,540	
■ 100% foreign co.	39	94,920	
<b>TOTAL</b>	<b>154</b>	<b>276,000</b>	<b>362,724</b>

### Production in 1993-1998

(thousand pairs)

Type of products	1993	1994	1995	1996	1997	1998
Canvas shoes	17,345	21,348	27,500	28,408	38,920	34,691
Sport shoes	6,888	22,232	32,000	60,569	93,361	96,389
Ladies and men shoes	12,500	19,248	24,836	31,631	34,775	38,197
Slippers, sandals	24,727	28,195	30,964	30,696	38,001	43,368
<b>Total</b>	<b>61,460</b>	<b>91,023</b>	<b>115,300</b>	<b>145,604</b>	<b>206,057</b>	<b>212,645</b>

### Production of export shoes with uppers from leather

(Unit ,1000 pairs ,1000 sqft)

Different kinds of shoes	1994	1994	1995	1995	1996	1996	1997	1997
	<i>Q-tity of shoes</i>	<i>Q-tity of Leather</i>	<i>Q-tity of shoes</i>	<i>Q-tity of Leather</i>	<i>Q-tity of shoes</i>	<i>Q-tity of Leather</i>	<i>Q-tity of shoes</i>	<i>Q-tity of Leather</i>
Canvas shoes	800	1,600	1,400	2,750	2,300	4,670	3,200	6,410
Sport shoes	3,500	7,700	5,100	11,520	10,200	22,420	19,800	39,620
Women shoes	2,600	3,900	3,800	6,700	4,200	7,310	7,700	11,500
Men leather shoes	-	-	-	-	300	720	600	1,500
Sandals and Slipper	600	680	900	1,100	1,200	1,423	1,900	2,100
Leather goods		2,280		3,340		4,300		5,700
<b>Total</b>	<b>7,500</b>	<b>16,160</b>	<b>11,200</b>	<b>25,430</b>	<b>18,200</b>	<b>40,823</b>	<b>33,200</b>	<b>66,800</b>
Of these:								
Local Leather		492		1,449		2,633		3,564
Import Leather		15,668		23,981		38,190		63,384



**Production and markets**  
(1000 pairs)

Type of product	1994	1995	1996	1997	1998
<b>TOTAL</b>					
Production	91,023.0	115,300.0	145,604.0	206,057.0	212,645.0
Export	79,769.4	97,744.0	128,500.0	176,100.0	185,552.0
Local market	12,986.0	17,556.0	17,104.0	29,957.0	27,093.0
<b>Sport shoes</b>					
Production	22,232.0	32,000.0	60,569.0	93,361.0	96,389.0
Export	20,008.8	29,120.0	53,300.7	85,300.0	87,714.0
<b>Canvas Shoes</b>					
Production	21,348.0	27,500.0	28,408.0	38,920.0	34,691.0
Export	18,145.8	22,375.0	24,999.4	32,692.8	29,487.0
<b>Lady shoes</b>					
Production	19,248.0	24,836.0	25,931.0	34,775.0	38,197.0
Export	16,360.8	21,110.6	22,819.3	30,602.0	34,377.0
<b>Slippers and sandals</b>					
Production	28,195.0	30,964.0	30,696.0	39,001.0	43,368.0
Export	25,254.0	25,138.4	27,380.6	27,500.0	33,974.0

### 3.2.3 Current processing capability

#### 3.2.3.1 Production process and technology

The existing 154 companies have more than 500 complete production lines (preparation, cutting, closing, lasting and finishing) with a capacity of about 600,000 pairs of shoes per line per year.

All machinery and plants are foreign made, as Vietnam does not have the possibility to produce them yet. More than 80% of machinery and equipment are imported from Taiwan, South Korea and Hong Kong; a smaller share from Japan, Europe and the USA. Italian machinery represents slightly more than 1%; they are mainly production lines for polyurethane shoes.

In 1998, the import value of machinery and plants was about 28 million US\$ plus spareparts worth 1.3 million US\$; 40% of the total value was in form of accessories (form, casing, cutter...). About 65-70% of the total machinery import value comes to Vietnam in form of foreign contribution to a joint venture or in the framework of a 100% foreign owned company.

Most production lines have a medium technical standard, long character and they employ a large number of workers with low labour productivity.

The preference for Asian machinery is explained by the lower price and more flexible terms of payment (countertrade, deferred payment e.a.). Methods in use for the production include cementation and vulcanization; besides that, welting, outsole stitching and direct injection.

The quality of the products is average if compared to international standards. Most companies are presently studying the requirements to obtain the ISO 9000 certification; until now, only two companies (Thuong Dinh and Thuy Khue) could achieve it.

Models and patterns used to depend on the requirement of the customers; however, Vietnamese companies are making an effort to create the production by themselves. A footwear research institute has been established for this purpose, besides some footwear technical centres.

Several world wide renowned companies from the USA and Europe established contracts with Vietnamese companies to produce their footwear in Vietnam. Among them, brand names such as Nike, Reebok, Adidas, Bata, Fila and others.

**Processing capacity of the Vietnamese footwear industry in 1998**  
(1000 pairs)

Type of product	Total	State owned companies (central)	State owned companies (local)	Non-State owned companies	Foreign invested companies
<b>Total</b>	<b>362,724</b>	<b>53,100</b>	<b>72,550</b>	<b>70,550</b>	<b>166,524</b>
Sport shoes	204,390	13,800	27,000	27,200	136,390
Canvas shoes	57,274	15,900	23,400	8,000	9,974
Slippers and sandals	56,610	5,000	7,750	23,700	20,160
Men leather and ladies shoes	44,450	18,400	14,400	11,650	-

**Export capability, volume and value**  
(1000 pairs, 1000 US\$)

	1994		1995		1996		1997		1998	
	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value	Quantity	Value
Sport shoes	20,008.8	130,600	29,120.0	193,040	53,300.7	326,200	85,300.0	666,500	87,714.0	668,074
Canvas shoes	18,145.8	63,840	22,375.0	72,460	24,999.4	87,200	32,692.8	105,700	29,487.0	112,428
Ladies shoes	16,360.8	35,500	21,110.6	51,540	22,819.3	90,100	30,602.0	140,500	34,377.0	143,244
Others	25,254.6	14,200	25,138.4	21,000	27,380.6	25,000	27,500.0	51,800	33,974.0	77,076
<b>Total</b>	<b>79,770</b>	<b>244,140</b>	<b>97,744</b>	<b>338,040</b>	<b>128,500</b>	<b>528,500</b>	<b>176,100</b>	<b>964,500</b>	<b>185,552</b>	<b>1,000,822</b>

**Machinery import**

	1996	1997	1998
Machines for traditional shoes	US\$ 66.7 million of which: Italy 1.21% S. Korea 29% Taiwan 46.8% Hong Kong 15% Others 9.2%	US\$ 60 million of which: Italy 1.38% S. Korea 28% Taiwan 41% Hong Kong 17% Others 12.62%	US\$ 28 million of which: Italy 1.05% S. Korea 42% Taiwan 31% Hong Kong 14% Others 11.95%
Spare part shoes machines	US\$ 3.88 million of which: Korea, Taiwan 60% Japan 20% Others 20%	US\$ 3.0 million of which: Korea, Taiwan 55% Japan 25% Others 20%	US\$ 1.3 million of which: Korea, Taiwan 64% Japan 22% Others 14%

### 3.2.3.2 Raw materials supply and trade

Presently, most outsoles and parts for the production of canvas shoes are made in Vietnam, while all other international standard raw materials are imported, mainly from Taiwan, South Korea, Thailand and other countries.

Raw materials are often provided by the foreign investor in the framework of the agreement.

**The Government encourages foreign investment in the production of raw materials and parts for footwear with special incentives, including a tax exemption of 4-8 years, special reduced tax rate after the fiscal holiday, and other privileges.**

### 3.2.4 Profile of major companies

1) *Leaprodexim (Vietnam National Leather and Footwear Corporation)*

25 Ly Thuong Kiet, Hanoi

Tel. 04-8255780; fax 8259216; e-mail leapro\_vn@hn.vnn.vn

Chairman: Mr. Phan Dinh Do; General Director: Mrs. Chau Hue Cam

The main company active in footwear production in Vietnam is Leaprodexim Vietnam, the national leather and footwear Corporation.

As usual in most industrial sectors in the country, the main companies of this sector have been grouped under a Corporation, a State owned umbrella co-ordinating the activities of the members.

Leaprodexim is active in production and trade of leather and footwear; import-export of machinery, equipment and materials; besides the institutional tasks of management of the sector and relevant policies.

Leaprodexim has 9 independent members; 7 dependent members and 1 leather and footwear research institute.

The main office is located in Hanoi, with a branch office in HoChiMinh City.

The combined capacity is as follows:

- Canvas shoes: 13.6 million pairs/year
- Sport shoes: 9.4 million pairs/year
- Ladies shoes: 15.3 million pairs/year
- Sandals and slippers: 5.0 million pairs/year
- Bags, briefcases, soft goods: 1.2 million pieces/year
- Finishing leather: 7.5 million sf/year

2) *Thang Long Shoes company (THASHOCO)*

411, Nguyen Tam Trinh, Ha Noi

Tel. 04-8621618/20; fax 8623768

Director: Mr. Nguyen Ngoc Nghiem

Production capacity:

- Canvas shoes: 2.5 million pairs/year
- Sport shoes: 1.2 million pairs/year
- Outsoles: 2.0 million pairs/year

Production lines:

- Canvas shoes: 4 lines
- Sport shoes: 2 lines
- Outsoles: 1 line

Export: EU countries

3) *Hanoi leather and shoes company (HALEXIM)*

409 duong Tam Trinh, Hanoi  
Tel. 04-8621254; fax 8624811  
Director: Mr. Vu Manh Cuong

Production capacity:

- Canvas shoes: 1.2 million pairs/year
- Hard leather: 40 tons/year
- Soft leather: 1.5 million squarefeet/year

Production lines:

- Canvas shoes: 2 lines
- Finished leather: 1 line

The company also produces industrial glues

4) *Yen Vien shoes company*

Thi tran Yen Vien, Gia Lam, Hanoi  
Tel. 04-8272044; fax 8271963  
Director: Mr. Do Trong Duc

Production capacity:

- Canvas shoes: 1.2 million pairs/year
- Ladies shoes: 1.8 pairs/year

Production lines:

- Canvas shoes: 2 lines
- Ladies shoes: 3 lines

5) *Thuong Dinh Footwear Company*

277/km8, Duong Nguyen Trai, Quan Thanh Xuan, Hanoi  
Tel. 04-8541268; fax 8582063  
Director: Mrs: Le Thi Binh

Production capacity:

- Canvas shoes: 4.2 million pairs/year

Production lines:

- Canvas shoes: 4 lines
- Shoes outsoles: 1 line
- - Computer embroidery machines: 2

The company is certified ISO 9000

6) *Thuy Khue Shoes Company*

152 Thuy Khue, Hanoi  
Tel. 04-8456417; fax 8232727  
Director: Mrs. Pham Thu Huong

Production capacity:

- Ladies shoes: 1.8 million pairs/year
- Canvas shoes: 2.5 million pairs/year

Production lines:

- Ladies shoes: 3 lines
- Canvas shoes: 4 lines

The company is certified ISO 9000

7) *Ngoc Ha Shoes Company*

Km 12, phuong Cong Vi, Ba Dinh, Hanoi

Tel. 04-8344997; fax 8343237

Director: Mrs. Nguyen Thi Nga

Production capacity:

- Ladies shoes: 1.2 million pairs/year
- Canvas shoes: 0.8 million pairs/year
- Bags, briefcases: 0.5 million pieces/year
- Caps: 1.0 million pieces/year

Production lines:

- Ladies shoes: 2 lines
- Canvas shoes: 1 line
- Bags, briefcases: 9 lines
- Caps: 5 lines

Export market: EU countries

8) *Haiphong leather products and footwear company (HP SHOLEGA)*

276 Hang Kenh, Haiphong

Tel. 031-847914; fax 844716

Director: Mr. Nguyen Gia Thao

Production capacity:

- Sport shoes: 8.0 million pair/year
- Canvas shoes: 1.3 million pairs/year
- Ladies shoes: 2.5 million pairs/year
- Foot ball: 0.5 million pieces/year
- Sport gloves: 0.3 million pairs/year
- Shoes outsoles: 7.0 million pairs/year
- Soft mouse: 15,000 m3/year

Production lines:

- Sport shoes: 13 lines
- Canvas shoes: 4 lines
- Ladies shoes: 4 lines
- Foot ball, sport gloves: 2 factories
- Shoes soles, soft mouse: 2 factories

9) *Dinh Vang Company LTD.*

Xa Du, Hang Kenh, An Hai, Haiphong

Tel. 031-840794; fax 844101

Director: Mrs. Nguyen Kim Thuy

Production capacity:

- Sport shoes: 2.4 million pair/year
- Ladies shoes: 2.4 million pairs/year

Production lines:

- Sport shoes: 4 lines
- Ladies shoes: 4 lines

10) *Hiep Hung Shoes Company (HIGIMEX)*

161F Da Nam, Phuong 3, Q8, HoChiMinh City

Tel. 08- 8557145; fax 8557144

General director: Mr. Nguyen Cao Tuong

Production capacity:

- Sport shoes: 1.8 million pair/year
- Canvas shoes: 3.0 million pairs/year
- Ladies shoes: 3.0million pairs/year

Production lines:

- Canvas shoes: 6 lines

- Sport shoes: 3 lines
- Ladies shoes: 5 lines

Plus some lines for production of outsoles; 1 technical center; 1 electrical-mechanical workshop.

11) An Lac Footwear Company (ALSIMEX)

Quoc Lo 1, Duong Hung Vuong noi dai, Thi tran An Lac, HCMC

Tel. 08-8759299; fax 8750083

Director: Mrs. Chau Hue Cam

Production capacity:

- Sport shoes: 0.6 million pairs/year
- Canvas shoes: 1.2 million pairs/year
- Ladies shoes: 2.4 million pairs/year
- Sandals and slippers: 4.0 million pairs/year

Production lines:

- Sport shoes: 2 lines
- Canvas shoes: 4 lines
- Ladies shoes: 4 lines
- Sandals: 6 lines

The company has three joint ventures with foreign companies

12) Phu Lam Footwear Company (FULEAMEX)

71C Ly Chieu Hoang, Q 6, HCMC

Tel. 08-8750098; fax 8754299; e-mail: phulam@hcm.fpt.vn

Director: Mr. Pham Khac Thanh

Production capacity:

- Ladies shoes: 4 million pairs/year
- Sport shoes: 1.2 million pairs/year
- Football shoes: 0.5 million pairs/year
- Inline-skate shoes: 0.5 million pairs/year
- Baseball gloves: 0.120 million pairs/year
- Shoes outsole: 2.0 million pairs/year

13) Saigon Leather Corporation (LEASGO)

146 Nguyen Cong Tru (floor N. 8), Q 1, HCMC

Tel: 08-8911003; fax 8940435

Director: Mr. Bui Van Duc

Production capacity:

- Tanning leather: 6.4 million sqf/year
- Various kinds of shoes: 4.7 million pairs/year

Machinery:

- Tanning machinery from Italy
- Shoes making machinery from Taiwan-S.Korea

14) Thanh Le Commercial Import-Export Company

445-53 Hung Vuong, Thu Dau Mot, Binh Duong

Tel. 065-822966; fax 824112

Director: Mrs. Dao Thi Thanh Nguyen

Production capacity:

- Ladies shoes: 1.2 million pair/year
- Canvas shoes: 3.0 million pairs/year

### 3.2.5 Development plan of the industry in the future

Vietnamese policy makers and officials in charge for the sector plan to develop the industry in the future to increase the production and improve the quality.

More enterprises will be encouraged to obtain the ISO 9000 certification and increase their productivity.

The sector will invest in modern machinery and equipment to increase the value added of the product; moreover, a new focus will be set on design. Local producers will try to research the market and develop new models suitable to international taste and requirements.

However, the main goal for the Vietnamese footwear industry in the future is the investment in machinery to manufacture components locally, in order to increase the local content of the finished products. As above quoted, for the time being most materials and parts for the production of footwear must be imported. The development of a local production of soles, tanned leather and accessories will decrease the production cost, while creating new opportunities for the Vietnamese enterprises, and it will help meet the requirements set by the European Union about local content of the production to be exported to this market.

A better co-operation will be established among all involved sectors such as tannery industry, footwear components and materials producers, accessories sector and footwear producers, to achieve a coordination and develop together.

The Government encourages the production of footwear components and especially the tanning sector through special incentives.

**Targets of the footwear industry to the year 2010**  
(1000 pairs)

Products	Target for year 2000	Target for year 2005	Target for year 2010
<b>FOOTWEAR (total)</b>	<b>250,000</b>	<b>390,000</b>	<b>610,000</b>
For export	225,000	351,000	561,000
Of which:			
Sport shoes	110,000	171,600	265,000
For export	103,000	161,304	258,068
Canvas shoes	51,250	79,950	127,000
For export	45,100	70,356	110,458
Lady shoes	46,250	72,150	114,000
For export	43,937	68,542	107,611
Leather shoes	8,000	11,700	18,000
For export	2,000	5,000	10,000
Other types of footwear	35,000	54,600	85,000
For export	28,063	45,798	74,845
<b>Other leather articles</b>	<b>31,352</b>	<b>51,730</b>	<b>80,698</b>
For export	30,098	49,661	77,470
<b>EXPORT VALUE</b>	<b>1,500,000</b>	<b>2,500,000</b>	<b>4,700,000</b>

### 3.3 LEATHER GOODS INDUSTRY

#### 3.3.1 Geographical location

Companies processing leather goods such as bags, briefcases and other goods are mainly located in HoChiMinh City. A few others are located in Hanoi or Danang.

#### 3.3.2 Current situation of the industry

The production of leather goods different from shoes is very limited in Vietnam.

Some companies produce handbags and briefcases on order; some have a processing contract with foreign partners who provide machinery and raw materials.

The production is very scattered and fragmented among family scale businesses and handicraft-like workshops.

Some main companies produce handbags, briefcases, suitcases and other; however, the main part of these products is not made of leather, and the statistics do not divide the different materials. The production of leather garments (clothes, jackets) is virtually non existing.

#### 3.3.3 Current processing capability

Statistics are available only for bags, handbags and suitcases, as other goods are not produced or extremely limited in Vietnam.

Not all goods included in the statistics are made of leather.

**Leather goods production**

<b>Products (1000 pieces)</b>	<b>Total</b>	<b>State Owned Enterprises</b>	<b>Local SOEs</b>	<b>Non-State enterprises</b>	<b>Foreign invested enterprises</b>
Bags, handbags, suitcases	26,570	1,000	8,000	2,770	14,800



### 3.3.4 Profile of major companies

1) *Leaprodexim (Vietnam National Leather and Footwear Corporation)*

25 Ly Thuong Kiet, Hanoi

Tel. 04-8255780; fax 8259216; e-mail leapro\_vn@hn.vnn.vn

Chairman: Mr. Phan Dinh Do; General Director: Mrs. Chau Hue Cam

The main company active in footwear production in Vietnam is Leaprodexim Vietnam, the national leather and footwear Corporation.

As usual in most industrial sectors in the country, the main companies of this sector have been grouped under a Corporation, a State owned umbrella co-ordinating the activities of the members.

Leaprodexim is active in production and trade of leather and footwear; import-export of machinery, equipment and materials; besides the institutional tasks of management of the sector and relevant policies.

Leaprodexim has 9 independent members; 7 dependent members and 1 leather and footwear research institute.

The main office is located in Hanoi, with a branch office in HoChiMinh City.

The combined capacity is as follows: Bags, briefcases, soft goods: 1.2 million pieces/year

2) *Ngoc Ha Shoes Company*

Km 12, phuong Cong Vi, Ba Dinh, Hanoi

Tel. 04-8344997; fax 8343237

Director: Mrs. Nguyen Thi Nga

Production capacity:

■ Bags, briefcases: 0.5 million pieces/year

■ Caps: 1.0 million pieces/year

Export market: EU countries

3) *Haiphong leather products and footwear company (HP SHOLEGA)*

276 Hang Kenh, Haiphong

Tel. 031-847914; fax 844716

Director: Mr. Nguyen Gia Thao

Production capacity:

■ Foot ball: 0.5 million pieces/year

■ Sport gloves: 0.3 million pairs/year

■ Soft mouse: 15,000 m3/year

Production lines:

■ Foot ball, sport gloves: 2 factories

■ Shoes soles, soft mouse: 2 factories

4) *Phu Lam Footwear Company (FULEAMEX)*

71C Ly Chieu Hoang, Q 6, HCMC

Tel. 08-8750098; fax 8754299; e-mail: phulam@hcm.fpt.vn

Director: Mr. Pham Khac Thanh

Production capacity: Baseball gloves: 0.120 million pairs/year

5) *Ladoda Company Ltd*

37 Phu Doan, Hoan Kiem District, Hanoi

Tel. 04-8265285; fax 8247056

Director Mr. Dinh Van Bao

Production capacity: bags, briefcases, 150,000 pieces/year

- 6) *Danang Leather Goods Factory (LEADAFAC)*  
159/1 Tran Cao Van, Danang City  
Tel. 0511-822319; fax 822319. e-mail: leadafac@dng.vnn.vn  
Director: Mr. Nguyen Hoai An  
Production capacity: bags, briefcases, handbags 120,000 pieces/year
- 7) *Saigon Shoes Company*  
419 Le Hong Phong, District 1, HCMC  
Tel 08- 8353820; fax 8390401  
Director: Mr. Nguyen Van Nguyen  
Production capacity: Bags, handbags, suitcases 0,5 million pieces/year
- 8) *Company 32 (Ministry of Defence)- ASECO*  
170 Quang Trung, Go Vap District, HCMC  
Tel. 08-8940416, fax 8940279  
Director: Mr. Mai Duy Hien  
Production capacity: Bags, briefcases 0.5 million pieces/year
- 9) *Saigon Leather Garment Company (SALEAGO)*  
71/1 Quang Trung, Ward 12, Go Vap District, HCMC  
Tel. 08-8958233; fax 8945291  
Director: Mr. Tran Quang Minh  
Production capacity: Bags, briefcases and soft goods 3.6 million pieces/year
- 10) *Hiep An Joint Stock Company*  
331 Gia Phu, District 6, HCMC  
Tel. 08-8556162; fax 8555012  
Director: Mr. Nguyen Duy Thuan  
Production capacity: Bags, briefcases and soft goods 0.3 million pieces/year
- 11) *Saigon Import-Export Leather and Footwear company (LEAPRODEXIM Saigon)*  
14 Nguyen Hue, District 1. HCMC  
Tel. 08-8231334; fax 8299217  
Director: Mr. Nguyen Bao Tho  
Production capacity: Bags, handbags 0.5 million pieces/year

### **3.4 UPHOLSTERY INDUSTRY**

This industry is still extremely limited in Vietnam and data are not available

## 4. STATE OF THE MARKET

### 4.1 Market features

The Vietnamese market is potentially very big: the population amounts to almost 80 million people and the income is growing steadily.

However, for the time being Vietnamese consumers do not purchase a relevant quantity of leather footwear, which is almost entirely produced for export.

In general most of the footwear and other leather goods produced by the Vietnamese enterprises are exported. Only a small amount of some goods such as bags are sold on the domestic market.

In the meantime, the local market is flooded by imported items from China and other Asian countries. Smuggled goods also pose a problem to the local producers.

### 4.2 Local consumption and leather supply

#### 4.2.1 Current situation

Domestic leather is rarely used to produce footwear made for export; normally, it is used only by tiny workshops producing for the domestic market.

On the other hand, other leather goods such as bags and others sold on the domestic market are made of domestically produced leather.

Good quality domestic leather is exported to China and Thailand (60% of the whole production) while the rest of the domestic production is low quality.

In 1997, the domestic industry consumed almost 70 million square feet of leather, 60 million of which were imported. Imports were worth 70 million US dollars.

The present consumption of leather reaches 75-80 million square feet; 60 million are used to produce goods for export; the rest are used by small workshops selling on the domestic market.

**Consumption of leather between 1995 and 1998**

Different kinds of Leather	1994	1995	1996	1997	1998
1 PU Coated Leather (1000sqft)	6,867.0	8,340.0	14,566.0	26,120.0	
2. Splitting leather	3,620.0	5,889.0	9,607.0	14,841.0	
3. Cow full grain leather(1000sqft)	1,313.0	2,874.0	4,640.0	7,788.0	
4. Pig, goat, sheep grain Leather	3,142.0	6,578.0	9,440.0	13,000.0	
Other leather (1000 sqft)	1,200.0	1,750.0	2,383.0	3,200.0	
Total(1000 sqft)	16,162.0	25,431.0	40,823.0	66,948.0	
Total turnover (1000 USD)	16,890.0	28,708.0	46,280.0	75,902.0	94,300.0

**Detailed consumption of leather  
(1997)**

<b>TT</b>	<b>Leather goods and markets</b>	<i>Quantity</i>	<i>Value</i>
	1	2	3
<b>I</b>	<b>Export products</b>	<b>1,770</b>	<b>2,565</b>
1	Wetblue Grain Leather	334	364
	- Buffalo	72	51
	- Cow	262	315
2	Crust Cow Coat Leather	1,055	1,697
	- Buffalo	-	-
	- Cow	1,055	1,697
3	- Crust Splitting Cow	81	114
4	Full grain Finishing Leather	300	600
	- Buffalo	-	-
	- Cow	-	-
		300	600
<b>II</b>	<b>Leather for export products</b>	<b>3,564</b>	<b>5,028</b>
1	Full Grain Finishing Leather	2,424	4,331
	- Buffalo	-	-
	- Cow	405	564
	- Pig	2,019	3,767
		-	-
	1	2	3
2	Splitting Leather	1,140	694
	. Buffalo	-	-
	. Cow	1,140	694
	. Pig	-	-
<b>III</b>	<b>Domestic consumer</b>	<b>5,430</b>	<b>4,842</b>
1	Full Gain Leather	4,161	4,536
	. Buffalo	852	720
	. Cow	3,244	3,807
	. Pig	65	19
2	Split Finishing Leather	1,269	318
	. Buffalo	338	75
	. Cow	907	240
	. Pig	12	3
	Total	10,774	12,555

## 4.2.2 Forecast of the local demand

**Forecast to the year 2010**  
(Unit: 1000 sqft, Value : 1000 USD)

TT	Leather goods and markets	2000		2005		2010	
		Quantity	Value	Quantity	Value	Quantity	Value
	1	4	5	6	7	8	9
<b>I</b>	<b>Export products</b>	<b>3,000</b>	<b>4,390</b>	<b>10,600</b>	<b>17,410</b>	<b>24,000</b>	<b>37,600</b>
1	Wetblue Grain Leather	600	650	2,000	2,180	4,000	4,400
	- Buffalo	150	110	500	375	1,000	800
	- Cow	450	540	1,500	1,805	3,000	3,600
2	Crust Cow Coat Leather	2,200	3,500	6,500	11,390	14,000	22,500
	- Buffalo	-	-	500	550	1,000	1,200
	- Cow	2,200	3,500	6,000	9,840	13,000	2,300
3	- Crust Splitting Cow	200	240	600	840	2,000	2,500
4	Full grain Finishing Leather	1,000	2,000	1,500	3,000	4,000	8,200
	- Buffalo	-	-	-	-	1,000	2,100
	- Cow	1,000	2,000	1,500	3,000	3,000	6,100
<b>II</b>	<b>Leather for export products</b>	<b>7,000</b>	<b>9,665</b>	<b>17,400</b>	<b>23,240</b>	<b>38,000</b>	<b>51,480</b>
1	Full Grain Finishing Leather	3,700	6,400	11,500	19,940	24,000	44,300
	- Buffalo	-	-	-	-	-	-
	- Cow	800	1,120	1,500	2,170	2,000	3,000
	- Pig	2,800	5,220	9,500	17,470	20,000	40,000
		100	60	560	300	2,000	1,300
	1	4	5	6	7	8	9
2	Splitting Leather	2,300	1,265	5,900	3,300	14,000	7,180
	. Buffalo	-	-	-	-	500	200
	. Cow	2,300	1,265	5,900	3,300	13,500	6,980
	. Pig	-	-	-	-	-	-
<b>III</b>	<b>Domestic consumer</b>	<b>7,000</b>	<b>6,090</b>	<b>12,000</b>	<b>11,465</b>	<b>18,000</b>	<b>15,325</b>
1	Full Gain Leather	4,800	5,480	6,400	10,445	11,000	13,250
	. Buffalo	1,000	900	2,000	1,900	3,000	3,000
	. Cow	3,600	4,500	5,900	8,320	7,300	9,855
	. Pig	200	180	500	235	700	350
2	Split Finishing Leather	2,200	610	3,600	1,020	7,000	2,120
	. Buffalo	700	175	1,500	386	2,600	600
	. Cow	1,450	435	2,000	600	4,000	1,400
	. Pig	50	13	100	40	400	120
	Total	17,000	20,115	40,000	52,115	80,100	104,405

## **5. STATE OF COMPETITION**

### **5.1 Leadership and Main Competitors**

Vietnam belongs to a new generation of developing countries; its economic growth started much later than in China or Thailand, to quote two main competitors.

The labour cost is cheaper in Vietnam than in other ASEAN countries or China; the foreign investment law is more favourable and the country has a very stable political and social situation. On the other hand, Vietnam has a less developed technology: most enterprises are still equipped with obsolete Soviet machines than need to be substituted.

Moreover, Vietnamese entrepreneurs and managers are not familiar with the mechanisms and common procedures of a market economy; the information system is backward; corruption and hidden costs are widespread.

Vietnam does not compete with the first generation “tigers” such as Taiwan and South Korea, who on the contrary are among the main investors. Its competitors are second and third generation newly industrialized economies such as Thailand, Indonesia and China; however, Vietnam started its industrialization process later. This causes advantages and disadvantages.

Future potential competitors such as Myanmar and Cambodia are still very scarcely industrialized and they present several difficulties to would be investors.

### **5.2 Options to penetrate the domestic market**

The best option to penetrate the domestic market is to produce on the place through joint venture or business co-operation agreements. As a matter of fact, Vietnamese import-export and investment laws are specifically designed to reduce imports and encourage export or import substitution.

The domestic purchasing power is still to limited to allow a considerable market for finished foreign products, with the exception of some niches.

Regarding raw materials and intermediate goods, the orientation is towards an increase in local content. For this reason, the best option is to produce leather in Vietnam assisting in the development of a strong local sector.

Vietnam does not have the possibility to build machinery yet, and it will need to import them for some years. Again, the best option is the transfer of machinery within a joint venture: statistics show that most Korean machinery existing in Vietnam, for example, where imported in the framework of such agreements.

Due to the peculiarity of the Vietnamese business environment, moreover, it is advisable that the Italian entrepreneur does not try to follow the business by himself from Italy, and experienced presence on the place is very important.

### **5.3 Potential partners**

Potential partners both in distribution and manufacturing are all main companies quoted in this study; they are eager to co-operate with foreign partners.

### **5.4 Distribution channels**

The distribution of intermediate goods for industrial purposes in Vietnam is mainly carried out by State owned trading companies.

Sometimes, machinery and equipment are purchased through bidding.

The contact with relevant authorities and business association is very important to be informed about bidding and plans to renovate machinery in State owned factories.



*Section C: Appendix*

# **V I E T N A M**

## **COMPANY PROFILES OF VIETNAM MANUFACTURERS**



## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	FINE VINA INDUSTRIAL Co., Ltd.
Address	No. 8, Cach Mang Thang Tam St.,
Town	Thu Dau Mot town, Binh Duong province
Telephone	(84650) 822492; Fax: (84650) 824620
E-mail	
Name of contact person	Nguyen Thi Mai Quynh (Asco Trading Co., Ltd. Hong Kong)
Name of the respondent	Pham Thuy Ngoc, Manager
Date of establishment	1994

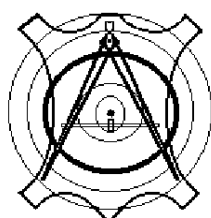
### 1. Daily production

TOTAL DAILY PRODUCTION			
Main products			
Type of products	Daily production	as % of total output	
a) Canvas shoes	6,000 pairs	13.3%	
b) Leather shoes			

2. Number of employees: Managers 26 persons  
Workers 800 persons  
TOTAL 826 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:		
EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Canvas shoes	0 %	100%
b) Leather shoes	0 %	100%



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Office: 755, February 3 Street, Ward 7, District 10, HCMC, VIETNAM.

Date in which the information have been filled .....

Period which the information referred to .....



## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	
Women trendy & casual.....	
Wholesale shoes.....	
Leisure shoes.....	
Sport shoes.....	<input checked="" type="checkbox"/>
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	
Slippers & house shoes.....	
Sports, athletics – Running shoes	<input checked="" type="checkbox"/>
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	<input checked="" type="checkbox"/>
Others... ..	<input checked="" type="checkbox"/>

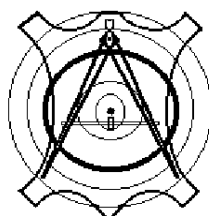
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical Canvas shoes <input checked="" type="checkbox"/>	from 3.00 to 4.50	USD
Medium Leather shoes	from 4.50 to 8.00	USD
Medium – expensive..... <input checked="" type="checkbox"/>	from 9.00 to 40.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material	B	R	R	R	R	R	R	R	B	R	R	R
Lining materials	B	R	R	R	R	R	R	R	B	R	R	R
Sole materials	B	R	R	R	R	R	R	R	B	R	R	R
Components	B	R	R	R	R	R	R	R	B	R	R	R
Other	B	R	R	R	R	R	R	R	B	R	R	R



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	ANJIN FOOTWEAR Co., Ltd.
Address	152A Huong Lo 5, An Lac town
Town	Binh Chanh district, Ho Chi Minh city
Telephone	(848) 8754447; Fax: (848) 8750084
E-mail	
Name of contact person	Bui Duc Thuan, Export Manager
Name of the respondent	Tran Thanh Chuong, Export Dept.
Date of establishment	1992

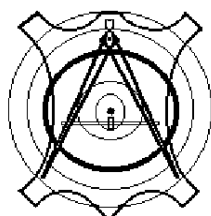
### 1. Daily production

TOTAL DAILY PRODUCTION			
Main products			
Type of products	Daily production	as % of total output	
a) Sport shoes	6,000 pairs		

2. Number of employees: Managers 100 persons  
Workers 1,700 persons  
TOTAL 1,800 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Sport shoes	0 %	100%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	
Women trendy & casual.....	
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	
Sport shoes.....	<input checked="" type="checkbox"/>
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	<input checked="" type="checkbox"/>
Boots.....	<input checked="" type="checkbox"/>
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	
Sports, athletics – Running shoes	<input checked="" type="checkbox"/>
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	<input checked="" type="checkbox"/>
Others... ..	<input checked="" type="checkbox"/>

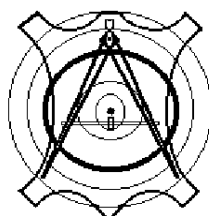
### 2. CATEGORY & PRICE RANGE

Category		Price-range	Currency
Economical	<input checked="" type="checkbox"/>	from 4.0 to 9.0	USD
Medium	<input checked="" type="checkbox"/>	from 10.0 to 15.0	USD
Medium – expensive	<input checked="" type="checkbox"/>	from 16.0 to 20.0	USD
Expensive.....		from.....to.....	.....
Luxury.....		from..... to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	SUN KUAN J.V Co., Ltd.
Address	129B1 Ly Chieu Hoang St., district 6
Town	Ho Chi Minh city
Telephone	(848) 8756168; Fax: (848) 8752710
E-mail	sunkuan-jvc@hcm.vnn.vn
Name of contact person	Henry Su, Export Manager
Name of the respondent	Henry Su
Date of establishment	1991

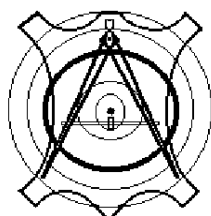
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Slippers with EVA sole	15,000 pairs	

2. Number of employees: Managers 140 persons  
Workers 530 persons  
TOTAL 670 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Slippers with EVA sole	0 %	100%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET
Women sophisticated.....
Women elegant.....
Women trendy & casual.....
Wholesale shoes.....
Leisure shoes.....
Sport shoes.....
Children shoes.....
Men sophisticated shoes.....
Men elegant shoes.....
Men trendy & casual....

1.2 TYPE OF SHOES
Evening shoes.....
Classics shoes.....
Classics moccasins.....
Boat moccasins.....
Other non-classical closed shoes...
Ankles boots & bootees.....
Boots.....
Sandals.....
Slippers & house shoes..... <input checked="" type="checkbox"/>
Sports, athletics – Running shoes
Climbing shoes.....
Anatomical footwear.....
Safety and work shoes.....
Others... ..

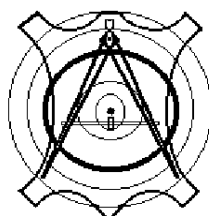
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium.....	from.....to.....	.....
Medium – expensive..... <input checked="" type="checkbox"/>	from 2.0 to 8.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material	R	R	R	R	B	B	B	B	R	R	R	R
Lining materials												
Sole materials												
Components												
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	B.K – SAK Co., Ltd.
Address	94A Hung Vuong St., (extended), An Lac town
Town	Binh Chanh district, Ho Chi Minh city
Telephone	(848) 8754446; Fax: (848) 8754445
E-mail	
Name of contact person	Young Lee, General Manager
Name of the respondent	Thanh Thuy, Export Manager
Date of establishment	1993

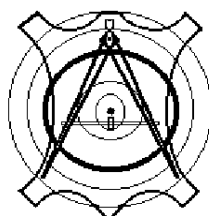
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Canvas shoes	5,500 pairs	
b) Bio sandals	4,000 pairs	

2. Number of employees: Managers 18 persons  
Workers 280 persons  
TOTAL 298 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Slippers	0 %	100%
b) House shoes	0 %	100%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET
Women sophisticated.....
Women elegant.....
Women trendy & casual.....
Wholesale shoes.....
Leisure shoes.....
Sport shoes.....
Children shoes.....
Men sophisticated shoes.....
Men elegant shoes.....
Men trendy & casual....

1.2 TYPE OF SHOES
Evening shoes.....
Classics shoes.....
Classics moccasins.....
Boat moccasins.....
Other non-classical closed shoes...
Ankles boots & bootees.....
Boots.....
Sandals.....
Slippers & house shoes..... <input checked="" type="checkbox"/>
Sports, athletics – Running shoes
Climbing shoes.....
Anatomical footwear.....
Safety and work shoes.....
Others... ..

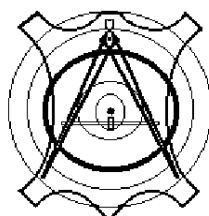
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium.....	from.....to.....	.....
Medium – expensive.....	from 2.0 to 4.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	MINH NGHE INDUSTRIAL-TRADING Co., Ltd.
Address	96D/3 To Ngoc Van St., Tam Binh ward, Thu Duc district,
Town	Ho Chi Minh city
Telephone	(848) 8970333; Fax: (848) 8971389
E-mail	Chinhanhminhnghe@hcm.vnn.vn
Name of contact person	
Name of the respondent	Hung Thu Van, Director
Date of establishment	1996

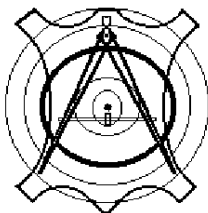
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Leather children shoes	8,000 pairs	
b) Leather shoes (lady, man)	10,000 pairs	
c) High-sole lady shoes	2,800 pairs	
The average daily output is 18,500-19,500 pairs, in which the composition of different types of shoes is subject to change, depending on the fashion season		

2. **Number of employees:** Managers 98 persons  
Workers 2,600 persons  
TOTAL 2,698 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Leather children shoes	0%	100%
b) Leather shoes (lady, man)	0%	100%
c) High-sole lady shoes	0%	100%



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## PRODUCT SHEET

### 1. Tick for product category

1.1. CONSUMERS TARGET	
Women sophisticated.....	<input checked="" type="checkbox"/>
Women elegant.....	<input checked="" type="checkbox"/>
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	<input type="checkbox"/>
Sport shoes.....	<input type="checkbox"/>
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	<input type="checkbox"/>
Men elegant shoes.....	<input type="checkbox"/>
Men trendy & casual....	<input type="checkbox"/>

1.2. TYPE OF SHOES	
Evening shoes.....	<input type="checkbox"/>
Classics shoes.....	<input type="checkbox"/>
Classics moccasins.....	<input type="checkbox"/>
Boat moccasins.....	<input checked="" type="checkbox"/>
Other non-classical closed shoes...	<input checked="" type="checkbox"/>
Ankles boots & bootees.....	<input checked="" type="checkbox"/>
Boots.....	<input checked="" type="checkbox"/>
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	<input checked="" type="checkbox"/>
Sports, athletics – Running shoes	<input checked="" type="checkbox"/>
Climbing shoes.....	<input type="checkbox"/>
Anatomical footwear.....	<input type="checkbox"/>
Safety and work shoes.....	<input type="checkbox"/>
Others...	<input type="checkbox"/>

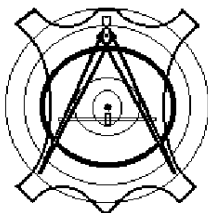
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical USD		
Medium: Leather children shoes	from 7.0 to 9.0	USD
Medium – expensive: High-sole lady shoes	from 10.0 to 14.0	USD
Expensive: Leather shoes (lady, man)	from 15.0 to 30.0	USD
Luxury.....		

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



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Date in which the information have been filled .....

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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise **FINE VINA INDUSTRIAL Co., Ltd.**  
 Address **No. 8, Cach Mang Thang Tam St.,**  
 Town **Thu Dau Mot town, Binh Duong province**  
 Telephone **(84650) 822492; Fax: (84650) 824620**  
 E-mail  
 Name of contact person **Nguyen Thi Mai Quynh (Asco Trading Co., Ltd. Hong Kong)**  
 Name of the respondent **Pham Thuy Ngoc, Manager**  
 Date of establishment **1994**

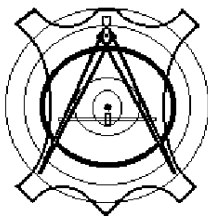
### 1. Daily production

TOTAL DAILY PRODUCTION			
Main products			
Type of products	Daily production	as % of total output	
a) Canvas shoes	6,000 pairs	13.3%	
b) Leather shoes			

2. Number of employees: Managers **26 persons**  
 Workers **800 persons**  
 TOTAL **826 persons**

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:			
EU countries			
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)	
a) Canvas shoes	0 %	100%	
b) Leather shoes	0 %	100%	



## OA GROUP

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**PRODUCT SHEET**

**1. Tick for product category**

**1.1 CONSUMERS TARGET**

Women sophisticated.....  
 Women elegant.....  
 Women trendy & casual.....  
 Wholesale shoes.....  
 Leisure shoes.....  
 Sport shoes.....   
 Children shoes.....   
 Men sophisticated shoes.....  
 Men elegant shoes.....  
 Men trendy & casual....

**1.2 TYPE OF SHOES**

Evening shoes.....  
 Classics shoes.....  
 Classics moccasins.....  
 Boat moccasins.....  
 Other non-classical closed shoes...  
 Ankles boots & bootees.....  
 Boots.....  
 Sandals.....  
 Slippers & house shoes.....  
 Sports, athletics – Running shoes   
 Climbing shoes.....  
 Anatomical footwear.....  
 Safety and work shoes.....   
 Others...

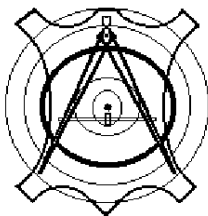
**2. CATEGORY & PRICE RANGE**

Category	Price-range	Currency
Economical Canvas shoes <input checked="" type="checkbox"/>	from 3.00 to 4.50	USD
Medium Leather shoes	from 4.50 to 8.00	USD
Medium – expensive..... <input checked="" type="checkbox"/>	from 9.00 to 40.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

**3. SOURCING MATERIALS AND COMPONENTS:**

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material	B	R	R	R	R	R	R	R	B	R	R	R
Lining materials	B	R	R	R	R	R	R	R	B	R	R	R
Sole materials	B	R	R	R	R	R	R	R	B	R	R	R
Components	B	R	R	R	R	R	R	R	B	R	R	R
Other	B	R	R	R	R	R	R	R	B	R	R	R



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Date in which the information have been filled .....

Period which the information referred to .....

## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	WEC Saigon Joint Stock Co.
Address	146 (Fl. 4) Nguyen Cong Tru St., district 1
Town	Ho Chi Minh city
Telephone	(848) 8215757; Fax: (848) 8296581; Mobile: 84 91 903616
E-mail	wec@hcm.vnn.vn
Name of contact person	Diep Thanh Kiet, Vice General Director
Name of the respondent	Nguyen Dinh Chuong, Director of Shoe manufacturing plant
Date of establishment	1976

### 1. Daily production

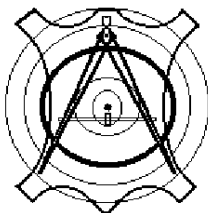
TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) EVA sponge slippers	5,000 pairs	50%
b) Sandals		20%
c) House slippers		30%

**2. Number of employees:**

Managers	10 persons
Workers	300 persons
<b>TOTAL</b>	<b>310 persons</b>

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:		
EU countries (UK, France, Italy, Greece, Holland, Spain)		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Slippers, sandals	0 %	100%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	<input checked="" type="checkbox"/>
Sports, athletics – Running shoes	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

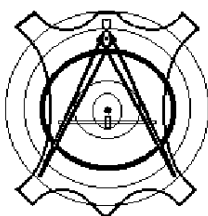
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium.....	from.....to.....	.....
Medium – expensive.....	from 1.5 to 3.5	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material	B/R	B/R	B/R	B/R	R			B	B/R	B/R	B/R	B/R
Lining materials												
Sole materials												
Components	B/R	B/R	B/R	B/R	R			B	B/R	B/R	B/R	B/R
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	An Giang Shoes Co., Ltd.
Address	167/2 Rural No. 80, Trung My Tay ward
Town	district 12, Ho Chi Minh city
Telephone	(848) 8910148; Fax: (848) 8911049;
E-mail	www.ags@hcm.vnn.vn
Name of contact person	Nguyen Thanh Gia Trung, Export Manager
Name of the respondent	Nguyen Thanh Gia Trung
Date of establishment	1995

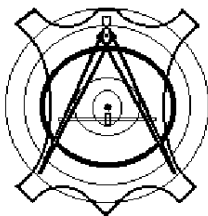
### 1. Daily production

TOTAL DAILY PRODUCTION			
Main products	Type of products	Daily production	as % of total output
a) Sport shoes		5,000 pairs	

**2. Number of employees:** Managers 62 persons  
 Workers 1,600 persons  
 TOTAL 1,662 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:		
EU countries	Domestic (% of TOT sales)	Export (% of TOT sales)
Type of products		
a) Sport shoes	0 %	100%



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**PRODUCT SHEET**

**1. Tick for product category**

**1.1 CONSUMERS TARGET**

Women sophisticated.....

Women elegant.....

Women trendy & casual.....

Wholesale shoes.....

Leisure shoes.....

Sport shoes.....

Children shoes.....

Men sophisticated shoes.....

Men elegant shoes.....

Men trendy & casual....

**1.2 TYPE OF SHOES**

Evening shoes.....

Classics shoes.....

Classics moccasins.....

Boat moccasins.....

Other non-classical closed shoes...

Ankles boots & bootees.....

Boots.....

Sandals.....

Slippers & house shoes.....

Sports, athletics – Running shoes

Climbing shoes.....

Anatomical footwear.....

Safety and work shoes.....

Others... ..

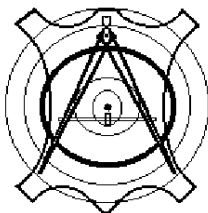
**2. CATEGORY & PRICE RANGE**

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium.....	from.....to.....	.....
Medium – expensive..... <input checked="" type="checkbox"/>	from 5.9 to 7.1	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

**3. SOURCING MATERIALS AND COMPONENTS:**

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material			B				R					
Lining materials			B				R					
Sole materials			B				R					
Components			B				R					
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	Duy Hung Shoes Co., Ltd.
Address	Song Than Industrial Zone,
Town	Di An town, Binh Duong province
Telephone	(848) 8961997; Fax: (848) 8965398
E-mail	duyhung@telnet.com.vn
Name of contact person	Ha Duy Hung, Director
Name of the respondent	Huynh Tran Thi Ngoc Dung , Secretary
Date of establishment	1994

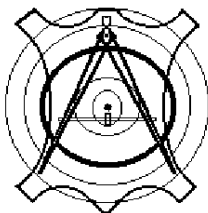
### 1. Daily production

TOTAL DAILY PRODUCTION			
Main products			
Type of products	Daily production		as % of total output
a) Sport shoes	9,240 pairs		

**2. Number of employees:** Managers 116 persons  
Workers 2,950 persons  
TOTAL 3,066 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries, Japan, Switzerland		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Sport shoes	0 %	100%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	
Women trendy & casual.....	
Wholesale shoes.....	
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	
Slippers & house shoes.....	
Sports, athletics – Running shoes	<input checked="" type="checkbox"/>
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

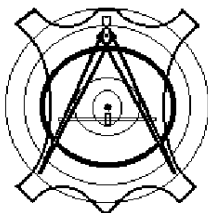
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium.....	from.....to.....	.....
Medium – expensive.....	from 6.0 to 14.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	An Phuoc Shoes Co., Ltd.
Address	100/11-12-13 An Duong Vuong St., ward 9, district 5,
Town	Ho Chi Minh city
Telephone	(848) 8350059; Fax: (848) 8350058
E-mail	anphuoc@hcm.vnn.vn
Name of contact person	Julian Chang, Supervisor
Name of the respondent	Nguyen Thi Dien, Director
Date of establishment	1994

### 1. Daily production

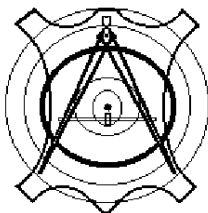
TOTAL DAILY PRODUCTION			
Main products			
Type of products	Daily production	as % of total output	
a) Sport shoes	6,000 pairs		

**2. Number of employees:**

Managers	100 persons
Workers	1,700 persons
<b>TOTAL</b>	<b>1,800 persons</b>

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:		
EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Sport shoes	0 %	100%



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**PRODUCT SHEET**

**1. Tick for product category**

**1.1 CONSUMERS TARGET**

Women sophisticated.....  
 Women elegant.....  
 Women trendy & casual.....  
 Wholesale shoes.....  
 Leisure shoes.....  
 Sport shoes.....  
 Children shoes.....   
 Men sophisticated shoes.....  
 Men elegant shoes.....  
 Men trendy & casual.....

**1.2 TYPE OF SHOES**

Evening shoes.....  
 Classics shoes.....  
 Classics moccasins.....  
 Boat moccasins.....  
 Other non-classical closed shoes...  
 Ankles boots & bootees.....  
 Boots.....  
 Sandals.....  
 Slippers & house shoes.....  
 Sports, athletics – Running shoes   
 Climbing shoes.....  
 Anatomical footwear.....  
 Safety and work shoes.....  
 Others.....

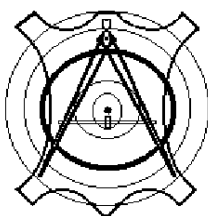
**2. CATEGORY & PRICE RANGE**

Category	Price-range	Currency
Economical..... <input checked="" type="checkbox"/>	from 5.0 to 20.0	USD
Medium.....	from.....to.....	.....
Medium – expensive.....	from.....to.....	.....
Expensive.....	from.....to.....	.....
Luxury.....	from..... to.....	.....

**3. SOURCING MATERIALS AND COMPONENTS:**

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise **Binh Tien IMEX Corp., Pte., Ltd. (BITI'S)**  
 Address **129 Bis Ly Chieu Hoang St., district 6**  
 Town **Ho Chi Minh city**  
 Telephone **(848) 8754513; Fax: (848) 8753443**  
 E-mail **bitis.vt@hcm.fpt.vn; Website: www.bitis.com.vn**  
 Name of contact person **Lam Kim Son, Export Manager**  
 Name of the respondent **Lam Kim Son**  
 Date of establishment **1982**

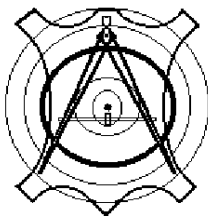
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Sport shoes, sandals with PU sole	3,000 pairs	20%
b) Sponge slippers, house shoes	30,000 pairs	80%

2. **Number of employees:** Managers **1,000 persons**  
 Workers **3,500 persons**  
 TOTAL **4,500 persons**

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:		
EU countries, Japan		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Sport shoes	90 %	10% (to EU)
Sandals with PU sole		
b) Sponge slippers	60%	40% (with 80% to EU)
c) House shoes	10%	90% (to EU)



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**PRODUCT SHEET**

**1. Tick for product category**

**1.1 CONSUMERS TARGET**

Women sophisticated.....  
 Women elegant.....  
 Women trendy & casual.....  
 Wholesale shoes.....  
 Leisure shoes.....  
 Sport shoes.....  
 Children shoes.....  
 Men sophisticated shoes.....  
 Men elegant shoes.....  
 Men trendy & casual....

**1.2 TYPE OF SHOES**

Evening shoes.....  
 Classics shoes.....  
 Classics moccasins.....  
 Boat moccasins.....  
 Other non-classical closed shoes...  
 Ankles boots & bootees.....  
 Boots.....  
 Sandals.....  
 Slippers & house shoes.....  
 Sports, athletics – Running shoes   
 Climbing shoes.....  
 Anatomical footwear.....  
 Safety and work shoes.....  
 Others... ..

**2. CATEGORY & PRICE RANGE**

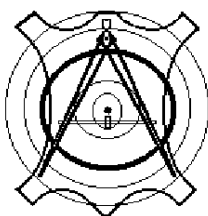
Category	Price-range	Currency
Economical..... <input checked="" type="checkbox"/>	from 0.80 to 1.90	USD
Medium: <input checked="" type="checkbox"/>	from 2.00 to 3.00	USD
Medium – expensive: <input checked="" type="checkbox"/>	from 3.00 to 4.00	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

**3. SOURCING MATERIALS AND COMPONENTS:**

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												

Remark: Permanently importing materials and components, thanks to the intensified local trading of shoes



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	Thai Binh Shoes Co., Ltd.
Address	43/5 Di An town, Thuan An district
Town	Binh Duong province
Telephone	(848) 8963306; Fax: (848) 8960223
E-mail	thaibinh@hcm.fpt.vn
Name of contact person	Nguyen Duc Thuan, Director
Name of the respondent	Nguyen Thanh Phien, Export Manager
Date of establishment	1994

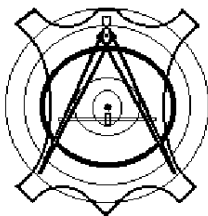
### 1. Daily production

TOTAL DAILY PRODUCTION			
Main products			
Type of products	Daily production	as % of total output	
a) Sport shoes	5,600 pairs		
b) Lady shoes	6,000 pairs		

**2. Number of employees:** Managers 200 persons  
Workers 2,500 persons  
TOTAL 2,700 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries, Japan, Switzerland		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Sport shoes	0 %	100%
b) Lady shoes	0 %	100%



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**PRODUCT SHEET**

**1. Tick for product category**

**1.1 CONSUMERS TARGET**

Women sophisticated.....

Women elegant.....

Women trendy & casual.....

Wholesale shoes.....

Leisure shoes.....

Sport shoes.....

Children shoes.....

Men sophisticated shoes.....

Men elegant shoes.....

Men trendy & casual....

**1.2 TYPE OF SHOES**

Evening shoes.....

Classics shoes.....

Classics moccasins.....

Boat moccasins.....

Other non-classical closed shoes...

Ankles boots & bootees.....

Boots.....

Sandals.....

Slippers & house shoes.....

Sports, athletics – Running shoes

Climbing shoes.....

Anatomical footwear.....

Safety and work shoes.....

Others.....

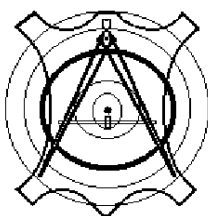
**2. CATEGORY & PRICE RANGE**

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium: Lady shoes <input checked="" type="checkbox"/>	from 4.5 to 8.0	USD
Medium – expensive: Sport shoes <input checked="" type="checkbox"/>	from 6.0 to 12.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

**3. SOURCING MATERIALS AND COMPONENTS:**

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



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Period which the information referred to .....

## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	ANJIN FOOTWEAR Co., Ltd.
Address	152A Huong Lo 5, An Lac town
Town	Binh Chanh district, Ho Chi Minh city
Telephone	(848) 8754447; Fax: (848) 8750084
E-mail	
Name of contact person	Bui Duc Thuan, Export Manager
Name of the respondent	Tran Thanh Chuong, Export Dept.
Date of establishment	1992

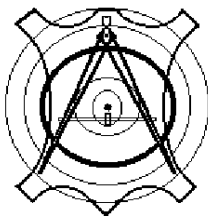
### 1. Daily production

<b>TOTAL DAILY PRODUCTION</b>			
Main products			
	Type of products	Daily production	as % of total output
a)	Sport shoes	6,000 pairs	

**2. Number of employees:** Managers 100 persons  
 Workers 1,700 persons  
 TOTAL 1,800 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries		
	Domestic (% of TOT sales)	Export (% of TOT sales)
a)	Sport shoes	0 %
		100%



## OA GROUP

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**PRODUCT SHEET**

**1. Tick for product category**

**1.1 CONSUMERS TARGET**

Women sophisticated.....  
 Women elegant.....  
 Women trendy & casual.....  
 Wholesale shoes.....  
 Leisure shoes.....  
 Sport shoes.....  
 Children shoes.....  
 Men sophisticated shoes.....  
 Men elegant shoes.....  
 Men trendy & casual....

**1.2 TYPE OF SHOES**

Evening shoes.....  
 Classics shoes.....  
 Classics moccasins.....  
 Boat moccasins.....  
 Other non-classical closed shoes...  
 Ankles boots & bootees.....  
 Boots.....  
 Sandals.....  
 Slippers & house shoes.....  
 Sports, athletics – Running shoes   
 Climbing shoes.....  
 Anatomical footwear.....  
 Safety and work shoes.....  
 Others...

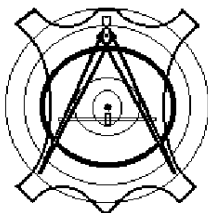
**2. CATEGORY & PRICE RANGE**

Category		Price-range	Currency
Economical	<input checked="" type="checkbox"/>	from 4.0 to 9.0	USD
Medium	<input checked="" type="checkbox"/>	from 10.0 to 15.0	USD
Medium – expensive	<input checked="" type="checkbox"/>	from 16.0 to 20.0	USD
Expensive.....		from.....to.....	.....
Luxury.....		from..... to.....	.....

**3. SOURCING MATERIALS AND COMPONENTS:**

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	DUC TRIEU Co., Ltd. (T&T FASHION SHOES)
Address	60A Van Thanh Bac St., ward 25, Binh Thanh district
Town	Ho Chi Minh city
Telephone	(848) 8201080; Fax: (848) 8204687
E-mail	tt@hcm.vnn.vn
Name of contact person	Tran Duc Trieu, Director
Name of the respondent	Tran Duc Trieu
Date of establishment	1995

### 1. Daily production

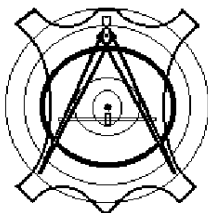
TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Leather shoes	400 pairs	

2. Number of employees: Managers 10 persons  
Workers 50 persons  
TOTAL 60 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

4.

Main markets		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Leather shoes	95 %	5%



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Period which the information referred to .....



## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	<input checked="" type="checkbox"/>
Women elegant.....	<input checked="" type="checkbox"/>
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	
Men sophisticated shoes.....	<input checked="" type="checkbox"/>
Men elegant shoes.....	<input checked="" type="checkbox"/>
Men trendy & casual....	<input checked="" type="checkbox"/>

1.2 TYPE OF SHOES	
Evening shoes.....	<input checked="" type="checkbox"/>
Classics shoes.....	<input checked="" type="checkbox"/>
Classics moccasins.....	<input checked="" type="checkbox"/>
Boat moccasins.....	<input checked="" type="checkbox"/>
Other non-classical closed shoes	<input checked="" type="checkbox"/>
Ankles boots & bootees.....	
Boots.....	
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	<input checked="" type="checkbox"/>
Sports, athletics – Running shoes	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

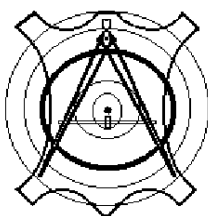
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical..... <input checked="" type="checkbox"/>	from 7.00 to 11.40	USD
Medium..... <input checked="" type="checkbox"/>	from 11.45 to 21.40	USD
Medium – expensive..... <input checked="" type="checkbox"/>	from 21.50 to 36.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material						B						R
Lining materials						B						R
Sole materials						B						R
Components			B		R		R		R		R	
Other			B		R		R		R		R	



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise **BINH TAY CONSUMER GOODS Co., Ltd.**  
 Address **22 Au Co St., ward 17, Tan Binh district**

Town **Ho Chi Minh city**  
 Telephone **(848) 8496082; Fax: (848) 8496005**  
 E-mail **binhtan@hcm.vnn.vn**  
 Name of contact person **Pham Thi Duyen, Assistant to Director**  
 Name of the respondent **Ngo Huu Nhi, Export Manager**

Date of establishment **1992**

### 1. Daily production

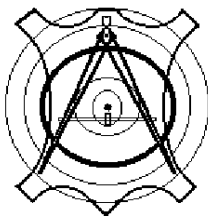
TOTAL DAILY PRODUCTION			
Main products			
Type of products	Daily production	as % of total output	
a) Canvas shoes	5,500 pairs		
b) Slippers with EVA sole	1,800 pairs		
c) Sandals with PU sole	5,000 pairs		

2. **Number of employees:** Managers **105 persons**  
 Workers **745 persons**  
 TOTAL **850 persons**

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: mostly to EU countries (70%), Asian countries (30%)

Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Canvas shoes	35%	65%
b) Slippers with EVA sole	35%	65%
c) Sandals with PU sole	35%	65%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	<input checked="" type="checkbox"/>
Sport shoes.....	<input checked="" type="checkbox"/>
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	<input checked="" type="checkbox"/>

1.2 TYPE OF SHOES	
Evening shoes.....	<input checked="" type="checkbox"/>
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	<input checked="" type="checkbox"/>
Sports, athletics – Running shoes	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	<input checked="" type="checkbox"/>
Others... ..	<input checked="" type="checkbox"/>

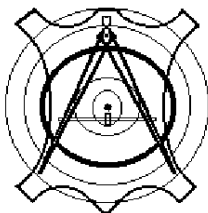
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical..... <input checked="" type="checkbox"/>	from 2.20 to 2.80	USD
Medium..... <input checked="" type="checkbox"/>	from 3.20 to 4.20	USD
Medium – expensive..... <input checked="" type="checkbox"/>	from 4.20 to 5.50	USD
Expensive (with leather) <input checked="" type="checkbox"/>	from 5.50 to 8.00	USD
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R
Lining materials	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R
Sole materials	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R
Components	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R
Other	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	SUN KUAN J.V Co., Ltd.
Address	129B1 Ly Chieu Hoang St., district 6
Town	Ho Chi Minh city
Telephone	(848) 8756168; Fax: (848) 8752710
E-mail	sunkuan-jvc@hcm.vnn.vn
Name of contact person	Henry Su, Export Manager
Name of the respondent	Henry Su
Date of establishment	1991

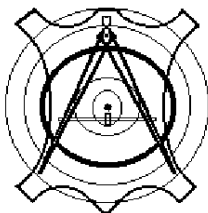
### 1. Daily production

<b>TOTAL DAILY PRODUCTION</b>		
Main products		
Type of products	Daily production	as % of total output
a) Slippers with EVA sole	15,000 pairs	

**2. Number of employees:** Managers 140 persons  
 Workers 530 persons  
 TOTAL 670 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

<b>Main markets</b>		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Slippers with EVA sole	0 %	100%



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**PRODUCT SHEET**

**1. Tick for product category**

**1.1 CONSUMERS TARGET**

Women sophisticated.....  
 Women elegant.....  
 Women trendy & casual.....  
 Wholesale shoes.....  
 Leisure shoes.....  
 Sport shoes.....  
 Children shoes.....  
 Men sophisticated shoes.....  
 Men elegant shoes.....  
 Men trendy & casual....

**1.2 TYPE OF SHOES**

Evening shoes.....  
 Classics shoes.....  
 Classics moccasins.....  
 Boat moccasins.....  
 Other non-classical closed shoes...  
 Ankles boots & bootees.....  
 Boots.....  
 Sandals.....  
 Slippers & house shoes.....   
 Sports, athletics – Running shoes  
 Climbing shoes.....  
 Anatomical footwear.....  
 Safety and work shoes.....  
 Others... ..

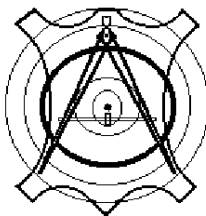
**2. CATEGORY & PRICE RANGE**

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium.....	from.....to.....	.....
Medium – expensive..... <input checked="" type="checkbox"/>	from 2.0 to 8.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

**3. SOURCING MATERIALS AND COMPONENTS:**

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material	R	R	R	R	B	B	B	B	R	R	R	R
Lining materials												
Sole materials												
Components												
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	B.K – SAK Co., Ltd.
Address	94A Hung Vuong St., (extended), An Lac town
Town	Binh Chanh district, Ho Chi Minh city
Telephone	(848) 8754446; Fax: (848) 8754445
E-mail	
Name of contact person	Young Lee, General Manager
Name of the respondent	Thanh Thuy, Export Manager
Date of establishment	1993

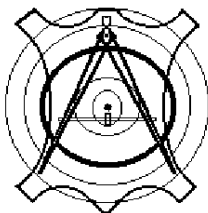
### 1. Daily production

<b>TOTAL DAILY PRODUCTION</b>			
Main products			
	Type of products	Daily production	as % of total output
a)	Canvas shoes	5,500 pairs	
b)	Bio sandals	4,000 pairs	
c)			

**2. Number of employees:** Managers 18 persons  
Workers 280 persons  
TOTAL 298 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries		
	Domestic (% of TOT sales)	Export (% of TOT sales)
a)	Slippers	0 % / 100%
b)	House shoes	0 % / 100%



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**PRODUCT SHEET**

**1. Tick for product category**

**1.1 CONSUMERS TARGET**

Women sophisticated.....  
 Women elegant.....  
 Women trendy & casual.....  
 Wholesale shoes.....  
 Leisure shoes.....  
 Sport shoes.....  
 Children shoes.....  
 Men sophisticated shoes.....  
 Men elegant shoes.....  
 Men trendy & casual.....

**1.2 TYPE OF SHOES**

Evening shoes.....  
 Classics shoes.....  
 Classics moccasins.....  
 Boat moccasins.....  
 Other non-classical closed shoes...  
 Ankles boots & bootees.....  
 Boots.....  
 Sandals.....  
 Slippers & house shoes.....   
 Sports, athletics – Running shoes  
 Climbing shoes.....  
 Anatomical footwear.....  
 Safety and work shoes.....  
 Others.....

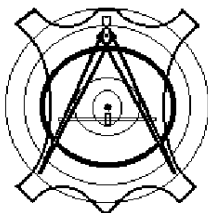
**2. CATEGORY & PRICE RANGE**

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium.....	from.....to.....	.....
Medium – expensive.....	from 2.0 to 4.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

**3. SOURCING MATERIALS AND COMPONENTS:**

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	MINH NGHE INDUSTRIAL-TRADING Co., Ltd.
Address	96D/3 To Ngoc Van St., Tam Binh ward, Thu Duc district,
Town	Ho Chi Minh city
Telephone	(848) 8970333; Fax: (848) 8971389
E-mail	Chinhanhminhnghe@hcm.vnn.vn
Name of contact person	
Name of the respondent	Hung Thu Van, Director
Date of establishment	1996

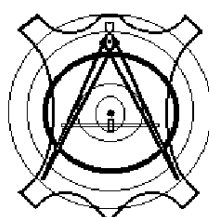
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Leather children shoes	8,000 pairs	
b) Leather shoes (lady, man)	10,000 pairs	
c) High-sole lady shoes	2,800 pairs	
The average daily output is 18,500-19,500 pairs, in which the composition of different types of shoes is subject to change, depending on the fashion season		

2. **Number of employees:** Managers 98 persons  
Workers 2,600 persons  
TOTAL 2,698 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Leather children shoes	0%	100%
b) Leather shoes (lady, man)	0%	100%
c) High-sole lady shoes	0%	100%



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## PRODUCT SHEET

### 1. Tick for product category

1.1. CONSUMERS TARGET	
Women sophisticated.....	<input checked="" type="checkbox"/>
Women elegant.....	<input checked="" type="checkbox"/>
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	<input type="checkbox"/>
Sport shoes.....	<input type="checkbox"/>
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	<input type="checkbox"/>
Men elegant shoes.....	<input type="checkbox"/>
Men trendy & casual....	<input type="checkbox"/>

1.2. TYPE OF SHOES	
Evening shoes.....	<input type="checkbox"/>
Classics shoes.....	<input type="checkbox"/>
Classics moccasins.....	<input type="checkbox"/>
Boat moccasins.....	<input checked="" type="checkbox"/>
Other non-classical closed shoes...	<input checked="" type="checkbox"/>
Ankles boots & bootees.....	<input checked="" type="checkbox"/>
Boots.....	<input checked="" type="checkbox"/>
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	<input checked="" type="checkbox"/>
Sports, athletics – Running shoes	<input checked="" type="checkbox"/>
Climbing shoes.....	<input type="checkbox"/>
Anatomical footwear.....	<input type="checkbox"/>
Safety and work shoes.....	<input type="checkbox"/>
Others...	<input type="checkbox"/>

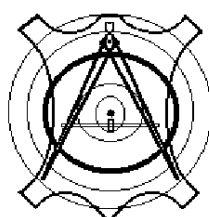
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical USD		
Medium: Leather children shoes	from 7.0 to 9.0	USD
Medium – expensive: High-sole lady shoes	from 10.0 to 14.0	USD
Expensive: Leather shoes (lady, man)	from 15.0 to 30.0	USD
Luxury.....		

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	WEC Saigon Joint Stock Co.
Address	146 (Fl. 4) Nguyen Cong Tru St., district 1
Town	Ho Chi Minh city
Telephone	(848) 8215757; Fax: (848) 8296581; Mobile: 84 91 903616
E-mail	wec@hcm.vnn.vn
Name of contact person	Diep Thanh Kiet, Vice General Director
Name of the respondent	Nguyen Dinh Chuong, Director of Shoe manufacturing plant
Date of establishment	1976

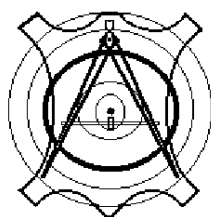
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) EVA sponge slippers	5,000 pairs	50%
b) Sandals		20%
c) House slippers		30%

2. Number of employees: Managers 10 persons  
Workers 300 persons  
TOTAL 310 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:		
EU countries (UK, France, Italy, Greece, Holland, Spain)		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Slippers, sandals	0 %	100%



## OA GROUP

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Period which the information referred to .....



## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	<input checked="" type="checkbox"/>
Sports, athletics – Running shoes	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

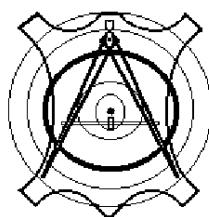
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium.....	from.....to.....	.....
Medium – expensive.....	from 1.5 to 3.5	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material	B/R	B/R	B/R	B/R	R			B	B/R	B/R	B/R	B/R
Lining materials												
Sole materials												
Components	B/R	B/R	B/R	B/R	R			B	B/R	B/R	B/R	B/R
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	An Giang Shoes Co., Ltd.
Address	167/2 Rural No. 80, Trung My Tay ward
Town	district 12, Ho Chi Minh city
Telephone	(848) 8910148; Fax: (848) 8911049;
E-mail	www.ags@hcm.vnn.vn
Name of contact person	Nguyen Thanh Gia Trung, Export Manager
Name of the respondent	Nguyen Thanh Gia Trung
Date of establishment	1995

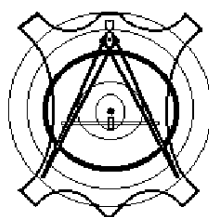
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Sport shoes	5,000 pairs	

**2. Number of employees:** Managers 62 persons  
Workers 1,600 persons  
TOTAL 1,662 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:		
EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Sport shoes	0 %	100%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	<input checked="" type="checkbox"/>
Sport shoes.....	<input checked="" type="checkbox"/>
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	<input checked="" type="checkbox"/>

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes... <input checked="" type="checkbox"/>	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	
Slippers & house shoes.....	
Sports, athletics – Running shoes <input checked="" type="checkbox"/>	
Climbing shoes..... <input checked="" type="checkbox"/>	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

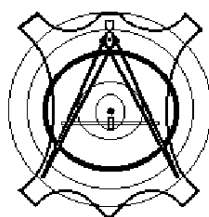
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium.....	from.....to.....	.....
Medium – expensive..... <input checked="" type="checkbox"/>	from 5.9 to 7.1	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material			B				R					
Lining materials			B				R					
Sole materials			B				R					
Components			B				R					
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	Duy Hung Shoes Co., Ltd.
Address	Song Than Industrial Zone,
Town	Di An town, Binh Duong province
Telephone	(848) 8961997; Fax: (848) 8965398
E-mail	duyhung@telnet.com.vn
Name of contact person	Ha Duy Hung, Director
Name of the respondent	Huynh Tran Thi Ngoc Dung , Secretary
Date of establishment	1994

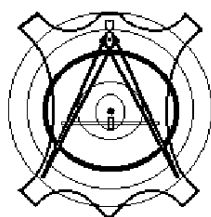
### 1. Daily production

TOTAL DAILY PRODUCTION			
Main products			
Type of products	Daily production	as % of total output	
a) Sport shoes	9,240 pairs		

2. Number of employees: Managers 116 persons  
Workers 2,950 persons  
TOTAL 3,066 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries, Japan, Switzerland		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Sport shoes	0 %	100%



## O.A. GROUP

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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	
Women trendy & casual.....	
Wholesale shoes.....	
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	
Slippers & house shoes.....	
Sports, athletics – Running shoes	<input checked="" type="checkbox"/>
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

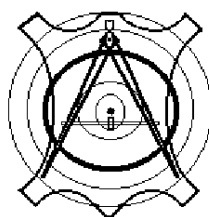
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium.....	from.....to.....	.....
Medium – expensive.....	from 6.0 to 14.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



## OA GROUP

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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	An Phuoc Shoes Co., Ltd.
Address	100/11-12-13 An Duong Vuong St., ward 9, district 5,
Town	Ho Chi Minh city
Telephone	(848) 8350059; Fax: (848) 8350058
E-mail	anphuoc@hcm.vnn.vn
Name of contact person	Julian Chang, Supervisor
Name of the respondent	Nguyen Thi Dien, Director
Date of establishment	1994

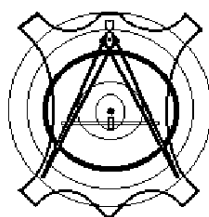
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Sport shoes	6,000 pairs	

2. Number of employees: Managers 100 persons  
Workers 1,700 persons  
TOTAL 1,800 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:		
EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Sport shoes	0 %	100%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	
Women trendy & casual.....	
Wholesale shoes.....	
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	
Slippers & house shoes.....	
Sports, athletics – Running shoes	<input checked="" type="checkbox"/>
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

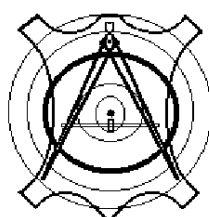
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical..... <input checked="" type="checkbox"/>	from 5.0 to 20.0	USD
Medium.....	from.....to.....	.....
Medium – expensive.....	from.....to.....	.....
Expensive.....	from.....to.....	.....
Luxury.....	from..... to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



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Date in which the information have been filled .....

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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise **Binh Tien IMEX Corp., Pte., Ltd. (BITI'S)**  
 Address **129 Bis Ly Chieu Hoang St., district 6**  
 Town **Ho Chi Minh city**  
 Telephone **(848) 8754513; Fax: (848) 8753443**  
 E-mail **bitis.vt@hcm.fpt.vn; Website: www.bitis.com.vn**  
 Name of contact person **Lam Kim Son, Export Manager**  
 Name of the respondent **Lam Kim Son**  
 Date of establishment **1982**

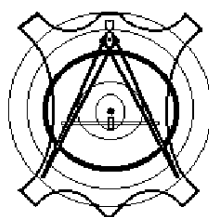
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Sport shoes, sandals with PU sole	3,000 pairs	20%
b) Sponge slippers, house shoes	30,000 pairs	80%

2. **Number of employees:** Managers **1,000 persons**  
 Workers **3,500 persons**  
 TOTAL **4,500 persons**

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:		
EU countries, Japan		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Sport shoes	90 %	10% (to EU)
Sandals with PU sole		
b) Sponge slippers	60%	40% (with 80% to EU)
c) House shoes	10%	90% (to EU)



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	
Women trendy & casual.....	
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	
Sport shoes.....	<input checked="" type="checkbox"/>
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	<input checked="" type="checkbox"/>
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	<input checked="" type="checkbox"/>
Sports, athletics – Running shoes	<input checked="" type="checkbox"/>
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

### 2. CATEGORY & PRICE RANGE

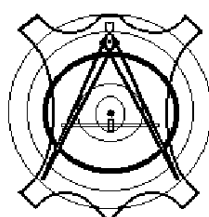
Category	Price-range	Currency
Economical..... <input checked="" type="checkbox"/>	from 0.80 to 1.90	USD
Medium: <input checked="" type="checkbox"/>	from 2.00 to 3.00	USD
Medium – expensive: <input checked="" type="checkbox"/>	from 3.00 to 4.00	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												

Remark: Permanently importing materials and components, thanks to the intensified local trading of shoes



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	Thai Binh Shoes Co., Ltd.
Address	43/5 Di An town, Thuan An district
Town	Binh Duong province
Telephone	(848) 8963306; Fax: (848) 8960223
E-mail	thaibinh@hcm.fpt.vn
Name of contact person	Nguyen Duc Thuan, Director
Name of the respondent	Nguyen Duc Thuan, Director
Date of establishment	1994

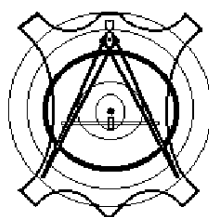
### 1. Daily production

TOTAL DAILY PRODUCTION		
Type of products	Daily production	as % of total output
a) Sport shoes	3,000 pairs	40%
b) Leather lady shoes	2,500 pairs	33%
c) Canvas shoes	2,000 pairs	27%

2. Number of employees: Managers 34 persons  
Workers 3,366 persons  
TOTAL 3,400 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:		
EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Sport shoes	30%	70%
b) Lady shoes	30%	70%
c) Canvas shoes	10%	90%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET
Women sophisticated.....
Women elegant.....
Women trendy & casual..... <input checked="" type="checkbox"/>
Wholesale shoes.....
Leisure shoes.....
Sport shoes..... <input checked="" type="checkbox"/>
Children shoes..... <input checked="" type="checkbox"/>
Men sophisticated shoes.....
Men elegant shoes.....
Men trendy & casual....

1.2 TYPE OF SHOES
Evening shoes.....
Classics shoes.....
Classics moccasins.....
Boat moccasins.....
Other non-classical closed shoes...
Ankles boots & bootees.....
Boots.....
Sandals.....
Slippers & house shoes.....
Sports, athletics – Running shoes <input checked="" type="checkbox"/>
Climbing shoes.....
Anatomical footwear.....
Safety and work shoes.....
Others... ..

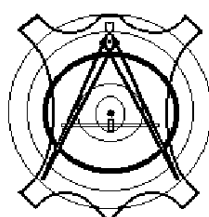
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical.....	from.....to.....	.....
Medium:	from.....to.....	.....
Medium – expensive: Sport shoes <input checked="" type="checkbox"/>	from 12.0 to 15.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material								B/R				
Lining materials								B/R				
Sole materials								B/R				
Components								B/R				
Other								B/R				



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	DUC TRIEU Co., Ltd. (T&T FASHION SHOES)
Address	60A Van Thanh Bac St., ward 25, Binh Thanh district
Town	Ho Chi Minh city
Telephone	(848) 8201080; Fax: (848) 8204687
E-mail	tt@hcm.vnn.vn
Name of contact person	Tran Duc Trieu, Director
Name of the respondent	Tran Duc Trieu
Date of establishment	1995

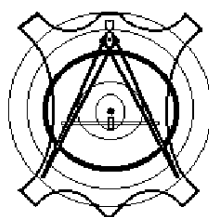
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Leather shoes	400 pairs	

2. Number of employees: Managers 10 persons  
Workers 50 persons  
TOTAL 60 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Leather shoes	95 %	5%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	<input checked="" type="checkbox"/>
Women elegant.....	<input checked="" type="checkbox"/>
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	
Men sophisticated shoes.....	<input checked="" type="checkbox"/>
Men elegant shoes.....	<input checked="" type="checkbox"/>
Men trendy & casual....	<input checked="" type="checkbox"/>

1.2 TYPE OF SHOES	
Evening shoes.....	<input checked="" type="checkbox"/>
Classics shoes.....	<input checked="" type="checkbox"/>
Classics moccasins.....	<input checked="" type="checkbox"/>
Boat moccasins.....	<input checked="" type="checkbox"/>
Other non-classical closed shoes	<input checked="" type="checkbox"/>
Ankles boots & bootees.....	
Boots.....	
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	<input checked="" type="checkbox"/>
Sports, athletics – Running shoes	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

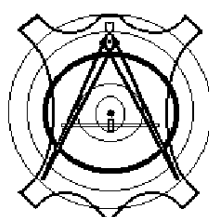
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical..... <input checked="" type="checkbox"/>	from 7.00 to 11.40	USD
Medium..... <input checked="" type="checkbox"/>	from 11.45 to 21.40	USD
Medium – expensive..... <input checked="" type="checkbox"/>	from 21.50 to 36.0	USD
Expensive.....	from.....to.....	.....
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material						B						R
Lining materials						B						R
Sole materials						B						R
Components			B		R		R		R		R	
Other			B		R		R		R		R	



## OA GROUP

TANNING MACHINERY AND PLANNING CONSULTANT SERVICES

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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	<b>BINH TAN CONSUMER GOODS Co., Ltd.</b>
Address	<b>22 Au Co St., ward 17, Tan Binh district</b>
Town	<b>Ho Chi Minh city</b>
Telephone	<b>(848) 8496082; Fax: (848) 8496005</b>
E-mail	<b>binhtan@hcm.vnn.vn</b>
Name of contact person	<b>Pham Thi Duyen, Assistant to Director</b>
Name of the respondent	<b>Ngo Huu Nhi, Export Manager</b>
Date of establishment	<b>1992</b>

### 1. Daily production

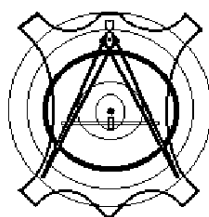
TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Canvas shoes	5,500 pairs	
b) Slippers with EVA sole	1,800 pairs	
c) Sandals with PU sole	5,000 pairs	

2. Number of employees: Managers **105 persons**  
Workers **745 persons**  
TOTAL **850 persons**

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: mostly to EU countries (70%), Asian countries (30%)

Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Canvas shoes	35%	65%
b) Slippers with EVA sole	35%	65%
c) Sandals with PU sole	35%	65%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	<input checked="" type="checkbox"/>
Sport shoes.....	<input checked="" type="checkbox"/>
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	<input checked="" type="checkbox"/>

1.2 TYPE OF SHOES	
Evening shoes.....	<input checked="" type="checkbox"/>
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	<input checked="" type="checkbox"/>
Sports, athletics – Running shoes	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	<input checked="" type="checkbox"/>
Others... ..	<input checked="" type="checkbox"/>

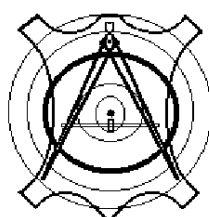
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical..... <input checked="" type="checkbox"/>	from 2.20 to 2.80	USD
Medium..... <input checked="" type="checkbox"/>	from 3.20 to 4.20	USD
Medium – expensive..... <input checked="" type="checkbox"/>	from 4.20 to 5.50	USD
Expensive (with leather) <input checked="" type="checkbox"/>	from 5.50 to 8.00	USD
Luxury.....	from.....to.....	.....

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R
Lining materials	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R
Sole materials	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R
Components	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R
Other	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R	B/R



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	<b>KHAI HOAN SHOES Company</b>
Address	<b>166 An Duong Vuong St., An Lac ward, Binh Chanh district,</b>
Town	<b>Ho Chi Minh city</b>
Telephone	<b>(848) 8754428; Fax: (848) 8753928;</b>
E-mail	
Name of contact person	<b>Bui The Hung, Director</b>
Name of the respondent	<b>Bui The Hung</b>
Date of establishment	<b>1994</b>

### 1. Daily production

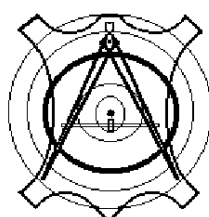
TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Leather lady shoes	22,500 pairs	

**2. Number of employees:**

White-collar	<b>300 persons</b>
Blue-collar	<b>5,000 persons</b>
<b>TOTAL</b>	<b>5,300 persons</b>

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:		
Type of products	Domestic	Export (% of TOT sales)
a) Leather lady shoes	No	95% (To EU); 4% (To North America); 1% (To Australia)



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	<input checked="" type="checkbox"/>
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	<input checked="" type="checkbox"/>
Classics shoes.....	<input checked="" type="checkbox"/>
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	<input checked="" type="checkbox"/>
Boots.....	
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	
Sports, athletics – Running shoes	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

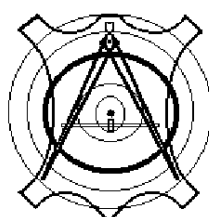
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical:	from 5.6 to 7.0	USD
Medium:	from 7.5 to 9.5	USD
Medium – expensive:	from 10.0 to 15.0	USD
Expensive:		
Luxury:		

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material			R			B			R			B
Lining materials			R			B			R			B
Sole materials			R			B			R			B
Components			R			B			R			B
Other			R			B			R			B



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	QUE BANG TRADING Co., Ltd.
Address	772 Ba Thang Hai St., district 10,
Town	Ho Chi Minh city
Telephone	(848) 8530279; Fax: (848) 8576917;
E-mail	
Name of contact person	Tang Van Duc, Director
Name of the respondent	Tang Van Duc, Director
Date of establishment	1994

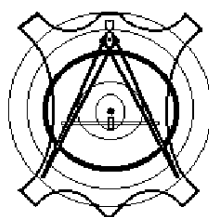
### 4. Daily production

TOTAL DAILY PRODUCTION			
Main products			
Type of products	Daily production		as % of total output
a) Leather shoes (lady, man)	10,000 pairs		
b) Rubber shoe sole	20,000 pairs		

5. **Number of employees:** Managers 9 persons  
Workers 980 persons  
TOTAL 1,000 persons

### 6. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Leather shoes (lady, man)	10%	90%
b) High-sole lady shoes	10%	90%



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## PRODUCT SHEET

### 4. Tick for product category

4.1. CONSUMERS TARGET	
Women sophisticated.....	<input checked="" type="checkbox"/>
Women elegant.....	<input type="checkbox"/>
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	<input type="checkbox"/>
Sport shoes.....	<input type="checkbox"/>
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	<input checked="" type="checkbox"/>
Men elegant shoes.....	<input type="checkbox"/>
Men trendy & casual....	<input checked="" type="checkbox"/>

4.2. TYPE OF SHOES	
Evening shoes.....	<input checked="" type="checkbox"/>
Classics shoes.....	<input type="checkbox"/>
Classics moccasins.....	<input type="checkbox"/>
Boat moccasins.....	<input type="checkbox"/>
Other non-classical closed shoes...	<input checked="" type="checkbox"/>
Ankles boots & bootees.....	<input type="checkbox"/>
Boots.....	<input type="checkbox"/>
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	<input type="checkbox"/>
Sports, athletics – Running shoes	<input type="checkbox"/>
Climbing shoes.....	<input type="checkbox"/>
Anatomical footwear.....	<input type="checkbox"/>
Safety and work shoes.....	<input type="checkbox"/>
Others...	<input type="checkbox"/>

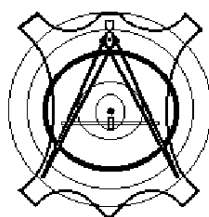
### 5. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical	from 5.0 to 8.0	USD
Medium:	from 8.0 to 10.0	USD
Medium – expensive:	from 10.0 to 25.0	USD
Expensive:	from 25.0 to 35.0	USD
Luxury.....		

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material	B	R	R	R	R	R	R	R	R	R	R	R
Lining materials	B	R	R	R	R	R	R	R	R	R	R	R
Sole materials	B	R	R	R	R	R	R	R	R	R	R	R
Components	B	R	R	R	R	R	R	R	R	R	R	R
Other	B	R	R	R	R	R	R	R	R	R	R	R



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	SAIGON FASHION Co., Ltd.
Address	15 Vo Van Tan St., district 3
Town	Ho Chi Minh city
Telephone	(848) 8230185; Fax: (848) 8296242
E-mail	
Name of contact person	Vu Van Tham, Director
Name of the respondent	Truong Minh Hue, Vice Director
Date of establishment	1992

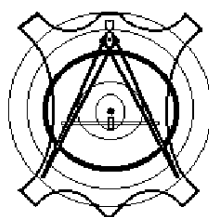
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Leather shoes (lady, man)	300 pairs	

**2. Number of employees:** Managers 7 persons  
Workers 88 persons  
TOTAL 95 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Leather shoes (lady, man)	0.01%	99.09%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	<input checked="" type="checkbox"/>
Women elegant.....	<input checked="" type="checkbox"/>
Women trendy & casual.....	
Wholesale shoes.....	
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	<input checked="" type="checkbox"/>
Men elegant shoes.....	<input checked="" type="checkbox"/>
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	<input checked="" type="checkbox"/>
Classics moccasins.....	
Boat moccasins.....	<input checked="" type="checkbox"/>
Other non-classical closed shoes...	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	
Slippers & house shoes.....	
Sports, athletics – Running shoes	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

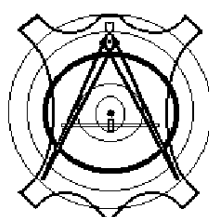
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical		
Medium:		
Medium – expensive:	from 20.0 to 35.0	USD
Expensive:	from 35.0 to 60.0	USD
Luxury.....		

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material												
Lining materials												
Sole materials												
Components												
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	VINH THONG SHOES Co., Ltd.
Address	14-15 Phan Van Tri St., Go Vap district,
Town	Ho Chi Minh city
Telephone	(848) 8943128; Fax: (848) 8946160;
E-mail	vithoco@hcm.fpt.vn
Name of contact person	Nguyen Quoc Tuan, Director
Name of the respondent	Nguyen Quoc Tuan, Director
Date of establishment	1994

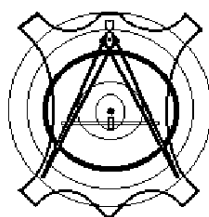
### 1. Daily production

TOTAL DAILY PRODUCTION		
Type of products	Daily production	as % of total output
a) Leather sandals (lady, man)	2,000 pairs	30% of total yearly output
b) Slippers	5,000 pairs	45% of total yearly output
c) Sport shoes	2,000 pairs	25% of total yearly output

**2. Number of employees:** Managers 53 persons  
Workers 304 persons  
TOTAL 357 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Leather sandals (lady, man)	0%	100%
b) Slippers	0%	100%
c) Sport shoes	0%	100%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	<input checked="" type="checkbox"/>
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	<input checked="" type="checkbox"/>
Sport shoes.....	<input checked="" type="checkbox"/>
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	<input checked="" type="checkbox"/>
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes... <input checked="" type="checkbox"/>	
Ankles boots & bootees..... <input checked="" type="checkbox"/>	
Boots.....	
Sandals..... <input checked="" type="checkbox"/>	
Slippers & house shoes..... <input checked="" type="checkbox"/>	
Sports, athletics – Running shoes <input checked="" type="checkbox"/>	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

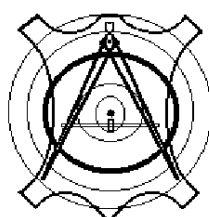
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical:	from 3.5 to 7.0	USD
Medium:	from 7.0 to 10.0	USD
Medium – expensive:		
Expensive:		
Luxury.....		

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material		R	R	R	R			B	B	B	B	
Lining materials		R	R	R	R			B	B	B	B	
Sole materials		R	R	R	R			B	B	B	B	
Components		R	R	R	R			B	B	B	B	
Other												



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	STAR POLO Co., Ltd.
Address	125/45 Hung Vuong St., ward 6, district 6,
Town	Ho Chi Minh city
Telephone	(848) 8866250; Fax: (848) 8383437;
E-mail	
Name of contact person	Trinh Gia Phu, Director
Name of the respondent	Trinh Gia Phu, Director
Date of establishment	1988

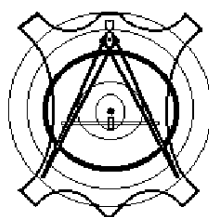
### 1. Daily production

TOTAL DAILY PRODUCTION		
Type of products	Daily production	as % of total output
a) Leather shoes (lady, man)	250 – 300 pairs	
b) Rock boots		
c) Sandals		

2. Number of employees: Managers 5 persons  
Workers 42 persons  
TOTAL 47 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Leather shoes (lady, man)	60%	40%
b) Rock boots		
c) Sandals		



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	<input checked="" type="checkbox"/>
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	<input checked="" type="checkbox"/>
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	
Men sophisticated shoes.....	
Men elegant shoes.....	<input checked="" type="checkbox"/>
Men trendy & casual....	<input checked="" type="checkbox"/>

1.2 TYPE OF SHOES	
Evening shoes.....	<input checked="" type="checkbox"/>
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	
Ankles boots & bootees.....	
Boots.....	
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	
Sports, athletics – Running shoes	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

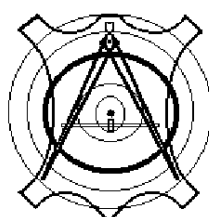
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical:		
Medium:	from 11.0 to 18.0	USD
Medium – expensive:		
Expensive:		
Luxury.....		

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material								B				
Lining materials								B				
Sole materials								B				
Components								B				
Other								B				



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Date in which the information have been filled .....

Period which the information referred to .....



## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise	GIA DINH Shoes Co., Ltd.
Address	1/27 National Rd. No. 13, Hiep Binh Phuoc ward,
Town	Thu Duc district , Ho Chi Minh city
Telephone	(848) 7269110; Fax: (848) 7268115;
E-mail	
Name of contact person	Nguyen Duc Trung, Director
Name of the respondent	Nguyen Huu Hanh
Date of establishment	1996

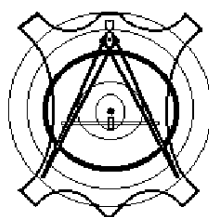
### 1. Daily production

TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Leather lady shoes	3,500 pairs	

**2. Number of employees:** Managers 29 persons  
 Workers 950 persons  
 TOTAL 979 persons

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets: EU countries, South Africa		
Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Leather lady shoes	0%	85% (to EU) 10% (to S. Africa) 5% (to others)



## OA GROUP

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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	<input checked="" type="checkbox"/>
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	

1.2 TYPE OF SHOES	
Evening shoes.....	<input checked="" type="checkbox"/>
Classics shoes.....	<input checked="" type="checkbox"/>
Classics moccasins.....	<input checked="" type="checkbox"/>
Boat moccasins.....	<input checked="" type="checkbox"/>
Other non-classical closed shoes... <input checked="" type="checkbox"/>	
Ankles boots & bootees.....	<input checked="" type="checkbox"/>
Boots.....	<input checked="" type="checkbox"/>
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	<input checked="" type="checkbox"/>
Sports, athletics – Running shoes	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

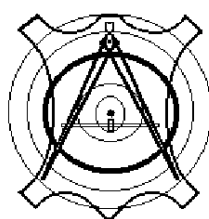
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical:	from 3.0 to 5.0	USD
Medium:	from 6.0 to 7.0	USD
Medium – expensive:	from 8.0 to 10.0	USD
Expensive:	from 11.0 to 20.0	USD
Luxury:	from 21.0 upwards	USD

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material	R	R		B	B	R	R	R			B	B
Lining materials	R			B	B	R	R	R			B	B
Sole materials	R	R		B	B	R	R	R		R	B	B
Components	R	R		B	B	R	R	R			B	B
Other	R	R		B	B	R	R	R		R	B	B



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise **VINAGICO Co., Ltd.**  
 Address **638 Nguyen Dinh Chieu St., district 3,**  
 Town **Ho Chi Minh city**  
 Telephone **(848) 8331230; Fax: (848) 8331245;**  
 E-mail  
 Name of contact person **Vu Van Chuong, Director**  
 Name of the respondent **Vu Van Thi**

Date of establishment **1995**

### 1. Daily production

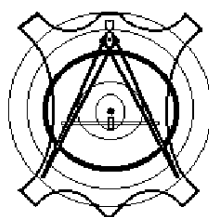
TOTAL DAILY PRODUCTION		
Main products		
Type of products	Daily production	as % of total output
a) Leather shoes (man, lady)	800 - 1,000 pairs	60% man; 40% lady (in the year beginning) 40% man; 60% lady (in the year end)

**2. Number of employees:** Managers **20 persons**  
 Workers **150 persons**  
 TOTAL **175 persons**

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:  
 Local market, with 28 sale agents throughout country (8 in Hochiminh, 12 in the North Vietnam, 6 in the Central Vietnam, 2 in Mekong delta)

Type of products	Domestic (% of TOT sales)	Export (% of TOT sales)
a) Leather shoes	100%	



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Office: 755, February 3 Street, Ward 7, District 10, HCMC, VIETNAM.

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Period which the information referred to .....



## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	<input checked="" type="checkbox"/>
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	
Leisure shoes.....	
Sport shoes.....	
Children shoes.....	
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	<input checked="" type="checkbox"/>

1.2 TYPE OF SHOES	
Evening shoes.....	
Classics shoes.....	<input checked="" type="checkbox"/>
Classics moccasins.....	<input checked="" type="checkbox"/>
Boat moccasins.....	
Other non-classical closed shoes... <input checked="" type="checkbox"/>	
Ankles boots & bootees.....	
Boots.....	<input checked="" type="checkbox"/>
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	
Sports, athletics – Running shoes	
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	

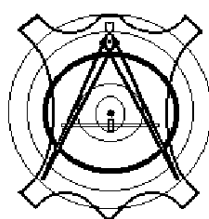
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical:	from 3.0 to 6.0	USD
Medium:	from 6.0 to 12.0	USD
Medium – expensive:	from 12.0 to 23.0	USD
Expensive:	from 24.0 to 100.0	USD
Luxury:		

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material	B											
Lining materials	B											
Sole materials	B											
Components	B											
Other	B											



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## QUESTIONNAIRE

### COMPANY DATA

Name of the enterprise **PHU LAM SHOES Company**  
 Address **71 C Ly Chieu Hoang St., ward 10, district 6,**  
 Town **Ho Chi Minh city**  
 Telephone **(848) 8750131; Fax: (848) 8754299; Email: phulam@fpt.hcm.vn**  
 E-mail  
 Name of contact person **Duong Ngoc Minh, Managing Director**  
 Name of the respondent **Duong Ngoc Minh**

Date of establishment **1987**

### 1. Daily production

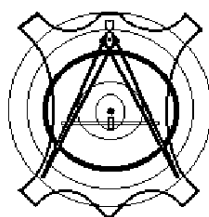
TOTAL DAILY PRODUCTION		
Type of products	Daily production	as % of total output
a) Leather lady shoes	14,500 pairs	69%
b) Sport shoes	4,500 pairs	21%
c) Soccer shoes, patin shoes	2,100 pairs	10%

2. Number of employees: White-collar **255 persons**  
 Blue-collar **4,387 persons**  
 TOTAL **4,642 persons**

### 3. Outlet markets (countries, possibly with % share on total sales)

Main markets:

Type of products	Domestic	Export (% of TOT sales)
a) Leather lady shoes	No	95% (To EU); 4% (To North America); 1% (to Australia)
b) Sport shoes	No	93% (To EU); 7% (To Asian countries)
c) Soccer shoes, patin shoes		2,100 pairs 10%



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## PRODUCT SHEET

### 1. Tick for product category

1.1 CONSUMERS TARGET	
Women sophisticated.....	
Women elegant.....	<input checked="" type="checkbox"/>
Women trendy & casual.....	<input checked="" type="checkbox"/>
Wholesale shoes.....	
Leisure shoes.....	
Sport shoes.....	<input checked="" type="checkbox"/>
Children shoes.....	<input checked="" type="checkbox"/>
Men sophisticated shoes.....	
Men elegant shoes.....	
Men trendy & casual....	<input checked="" type="checkbox"/>

1.2 TYPE OF SHOES	
Evening shoes.....	<input checked="" type="checkbox"/>
Classics shoes.....	
Classics moccasins.....	
Boat moccasins.....	
Other non-classical closed shoes...	<input checked="" type="checkbox"/>
Ankles boots & bootees.....	<input checked="" type="checkbox"/>
Boots.....	<input checked="" type="checkbox"/>
Sandals.....	<input checked="" type="checkbox"/>
Slippers & house shoes.....	
Sports, athletics – Running shoes	<input checked="" type="checkbox"/>
Climbing shoes.....	
Anatomical footwear.....	
Safety and work shoes.....	
Others... ..	<input checked="" type="checkbox"/>

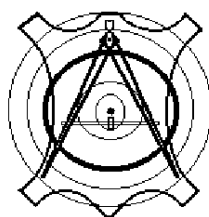
### 2. CATEGORY & PRICE RANGE

Category	Price-range	Currency
Economical:	from 6.2 to 7.35	USD
Medium:	from 8.3 to 9.6	USD
Medium – expensive:	from 12.2 to 14.5	USD
Expensive:		
Luxury:		

### 3. SOURCING MATERIALS AND COMPONENTS:

Indicating with B the period when the bulk of ordering is made and R the re-stocking

TYPE OF INPUT	TIMING											
	Jan.	Feb.	Mar.	April	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Upper material			R			B			R			B
Lining materials			R			B			R			B
Sole materials			R			B			R			B
Components			R			B			R			B
Other			R			B			R			B



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