

FDRA

*SHOE SOURCING AND
SUPPLY CHAIN SUMMIT*

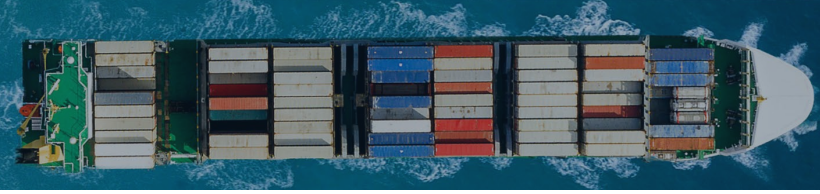


WELCOME!
Networking Breakfast

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ACCESS:

Online Agenda

Speakers

Digital Sponsor Exhibit Area

» ShoeSourcingSummit.com

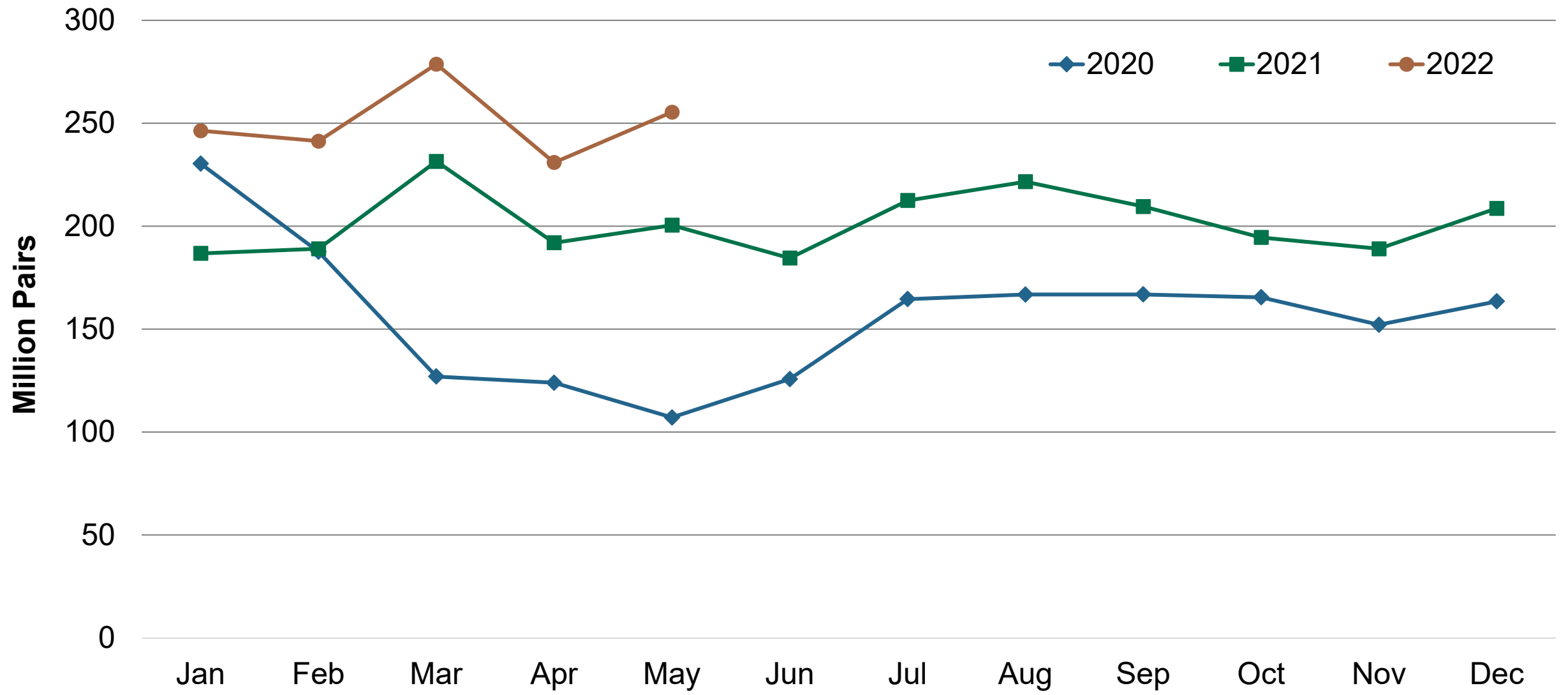
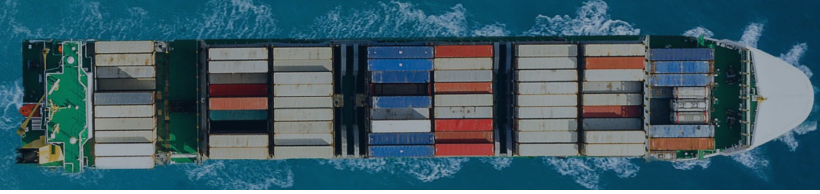


WELCOME
FDRA Data Review
(imports, material costs, prices, sales)

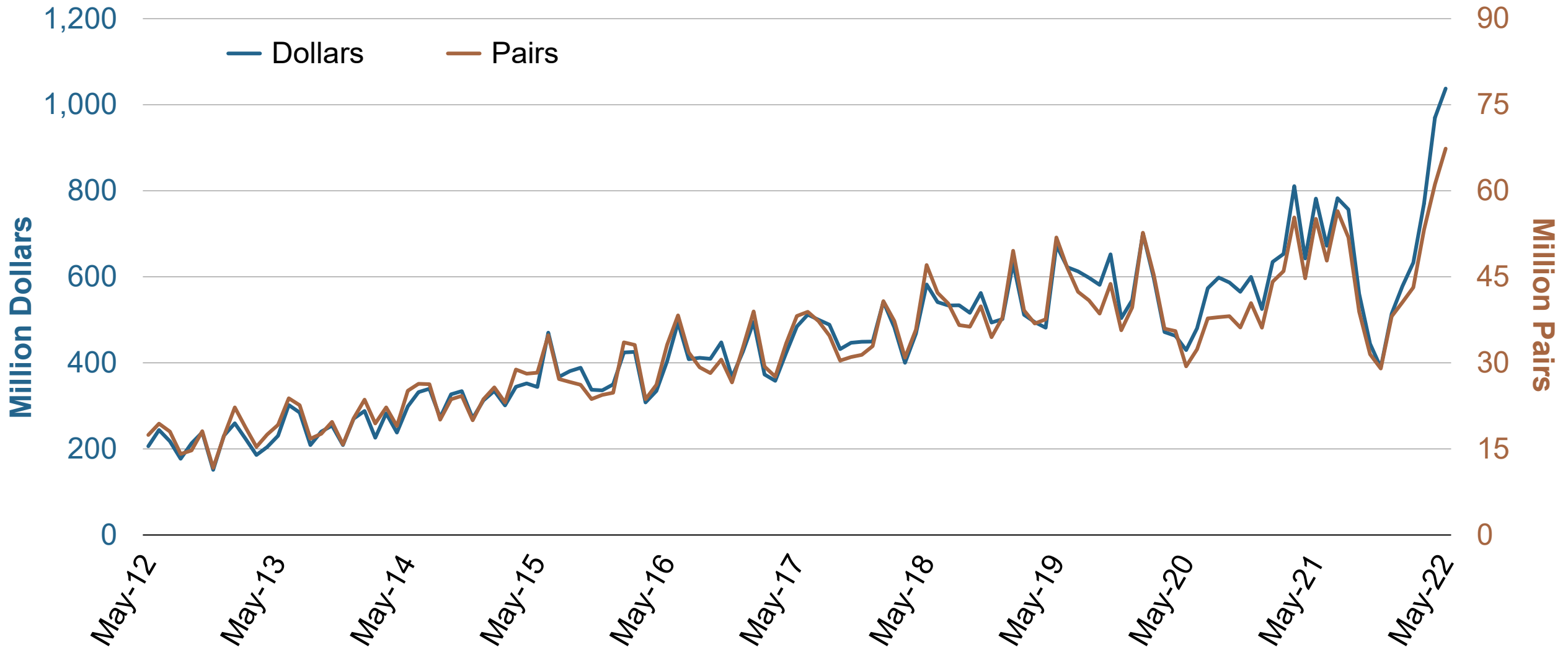
Matt Priest, President & CEO, FDRA



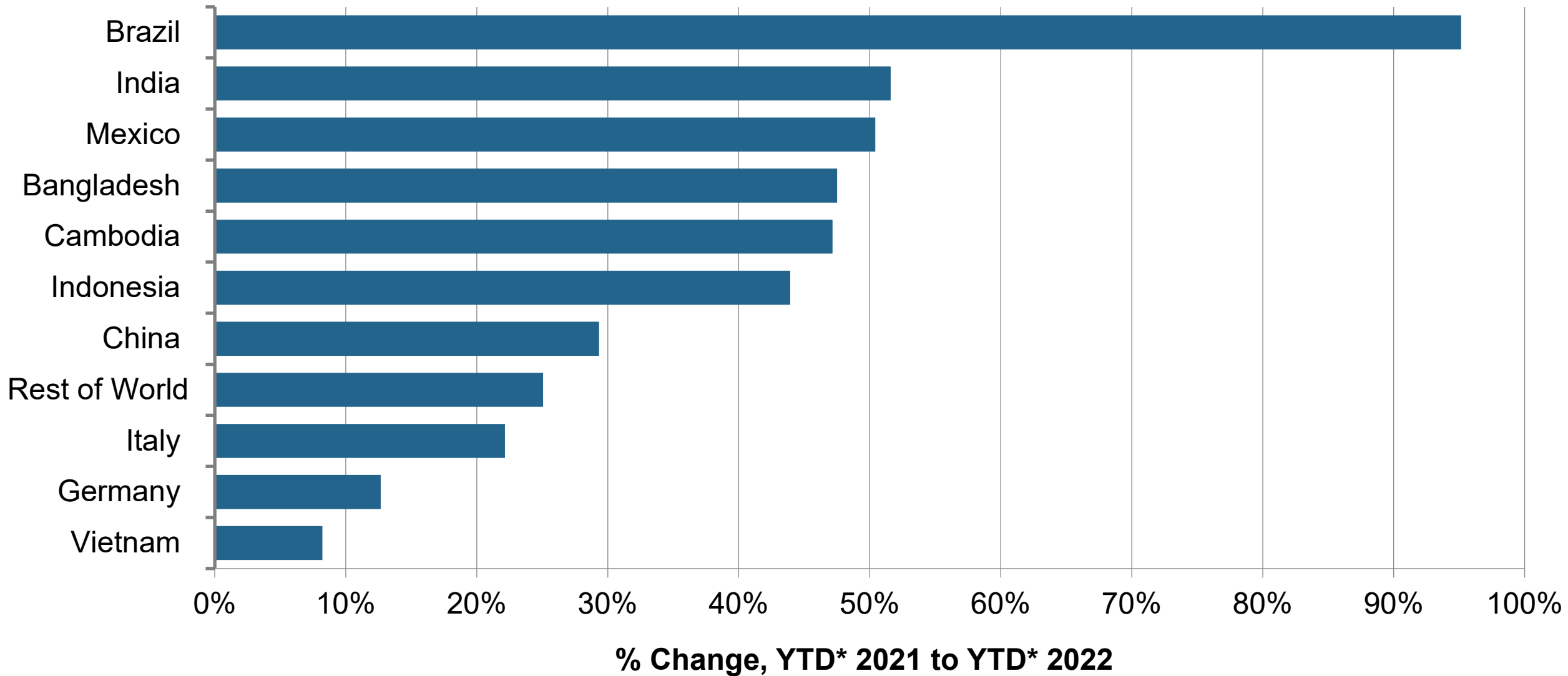
US Footwear Imports Extend Streak of Gains to Highest May on Record...



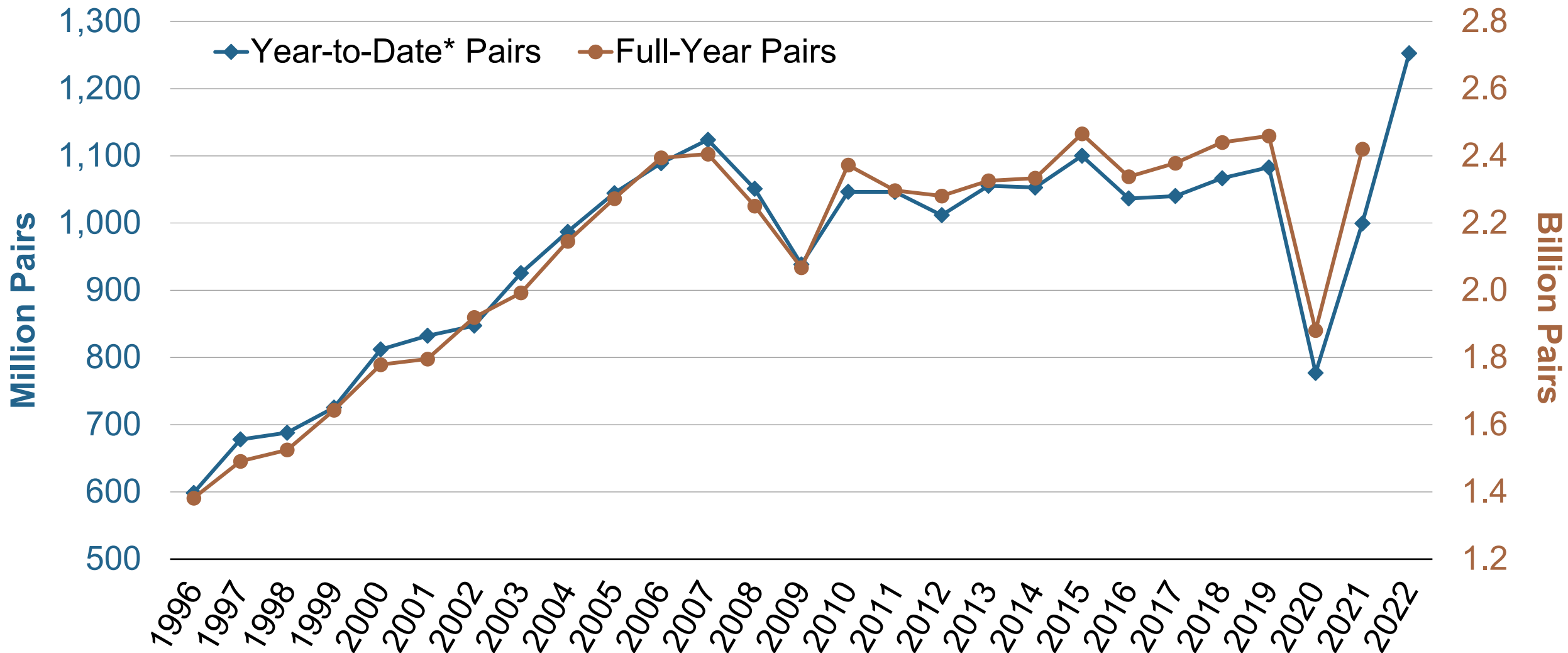
...led by Record Shipments from Vietnam



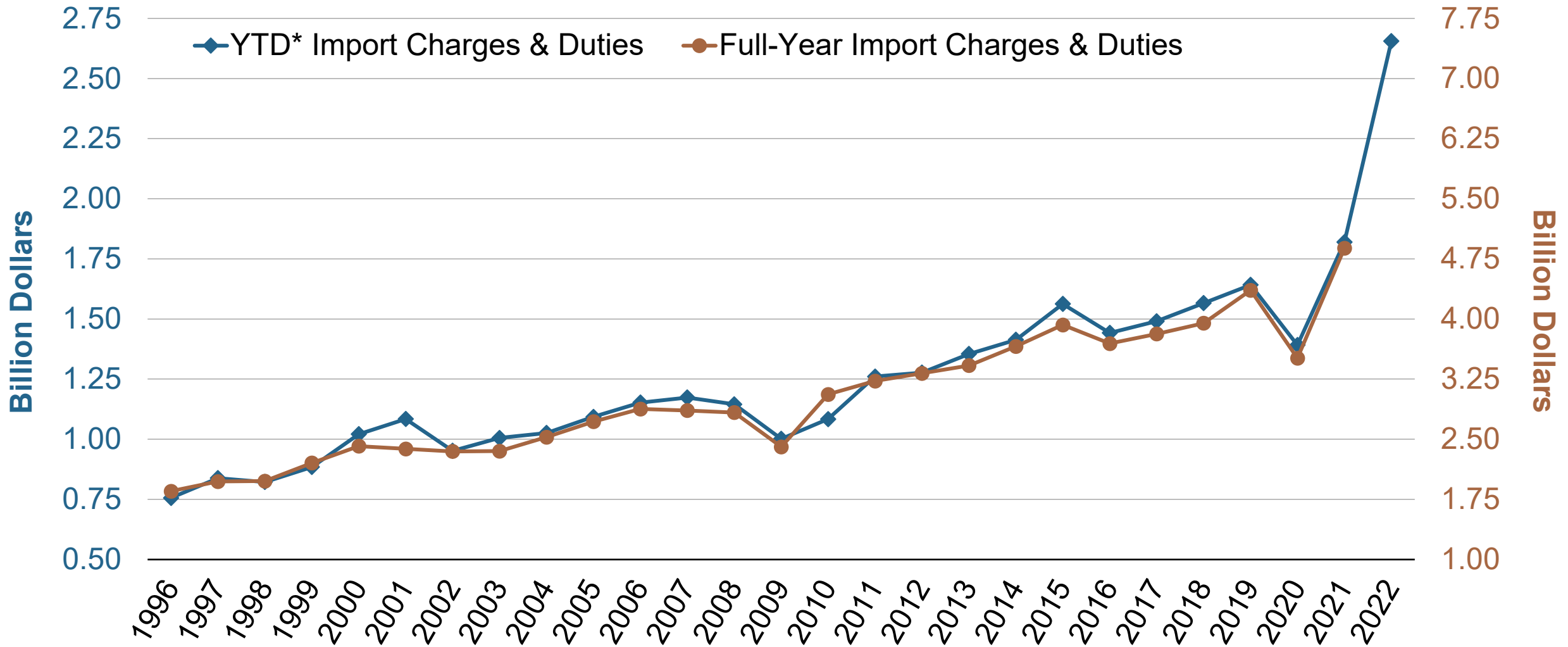
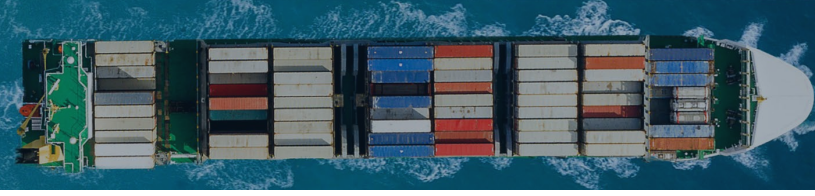
Year-to-Date* Footwear Imports Broadly Higher from all Key Origins...



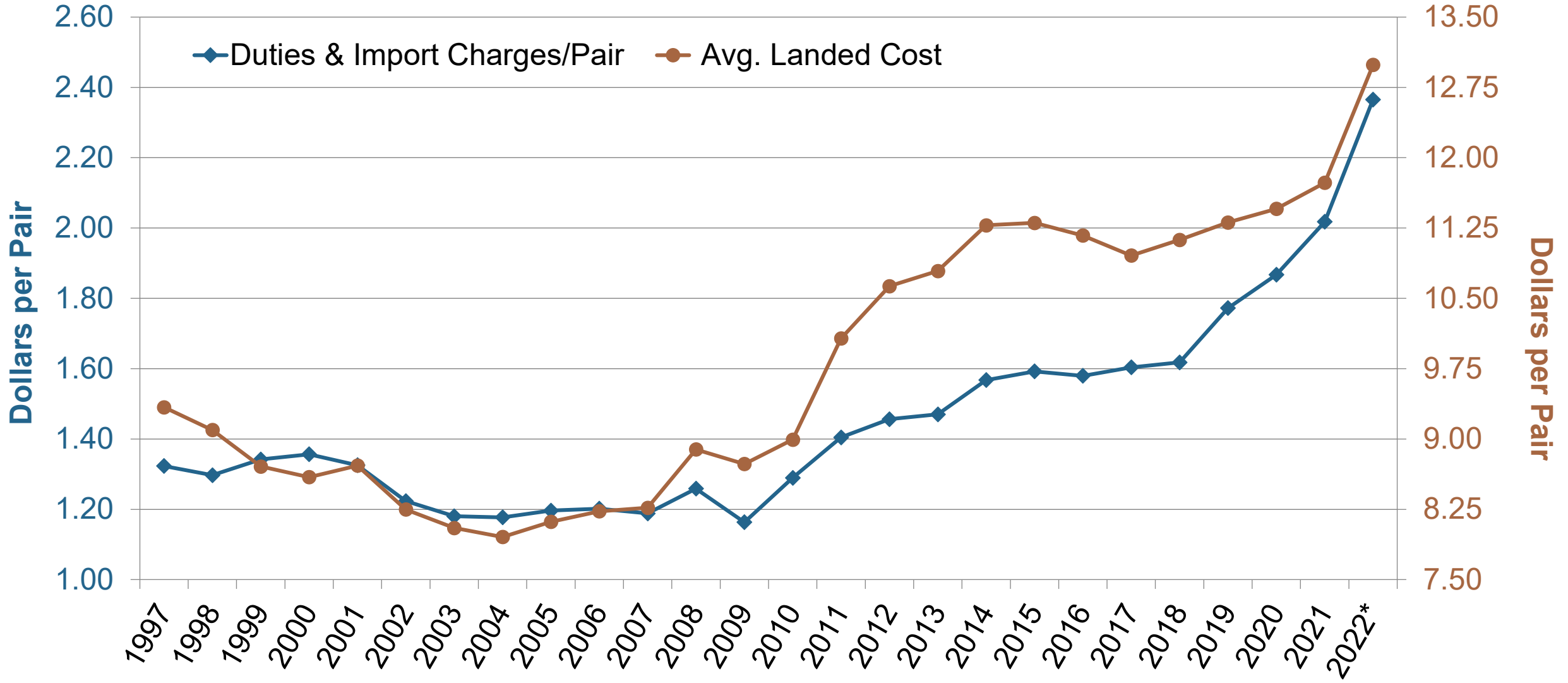
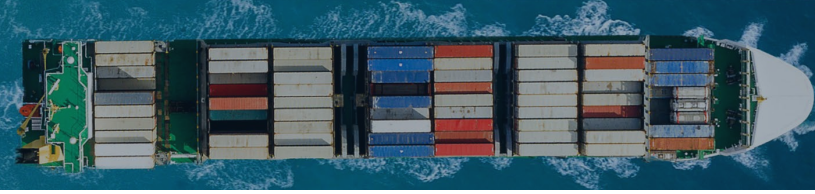
...keeping Total Footwear Imports on Track to Reach a Record in 2022



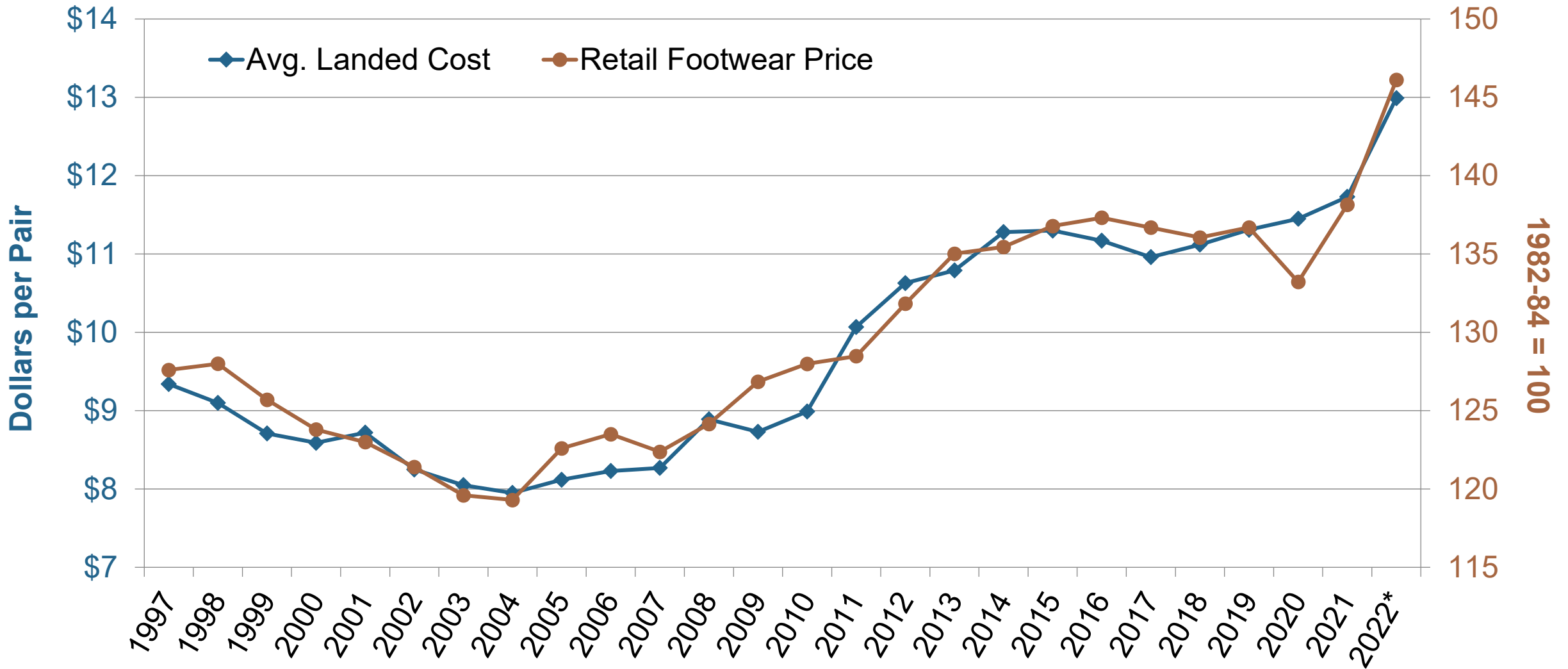
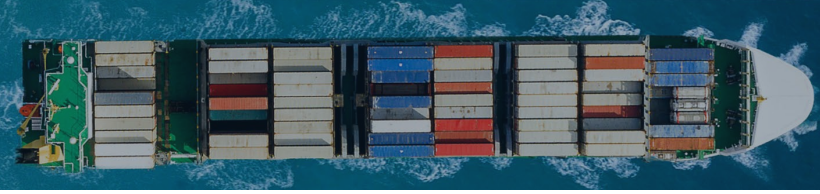
But Import Charges + Duties are Poised to Surge a Record in 2022



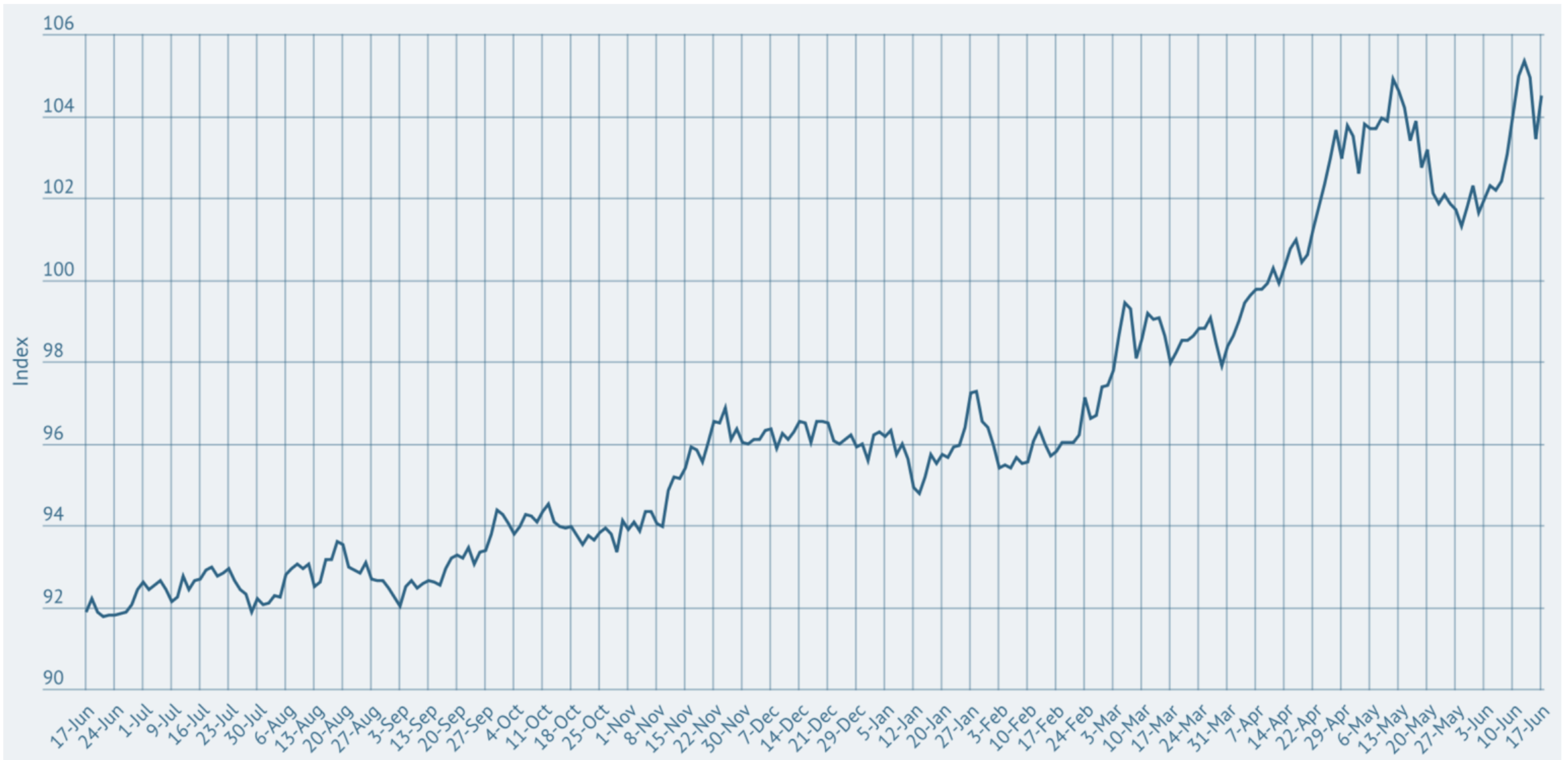
Rising Average Duties & Import Charges Buoy Record Average Landed Costs per Pair



Record Average Landed Cost per Pair of Footwear Imports to Buoy Retail Price



U.S. Dollar Index Nearby Futures Near a Twenty-Year High



Freightos Baltic Index (FBX) FBX China/East Asia – North America West Coast



15 July 2022 / \$7,273



Freightos Baltic Index (FBX)

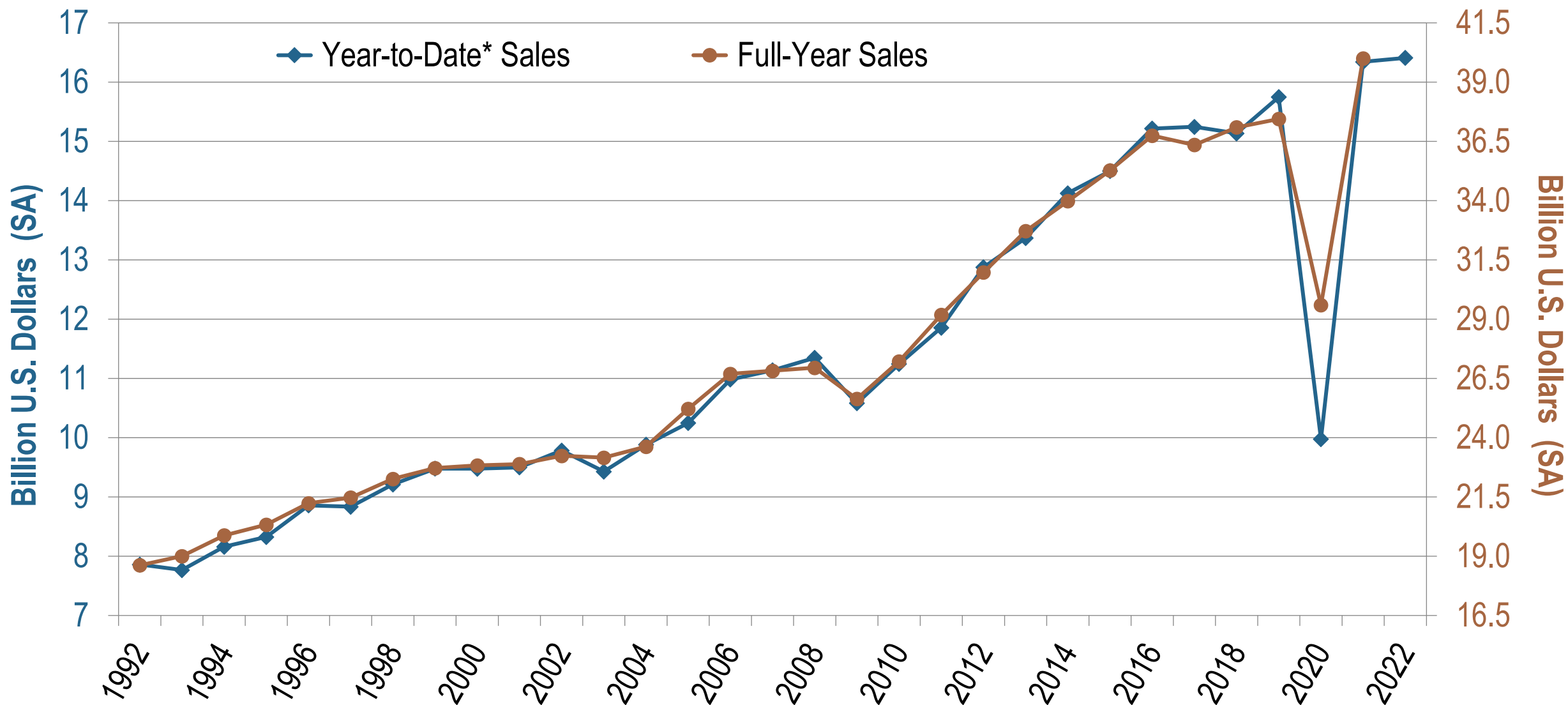
Year on Year: FBX01 China/East Asia – North America West Coast



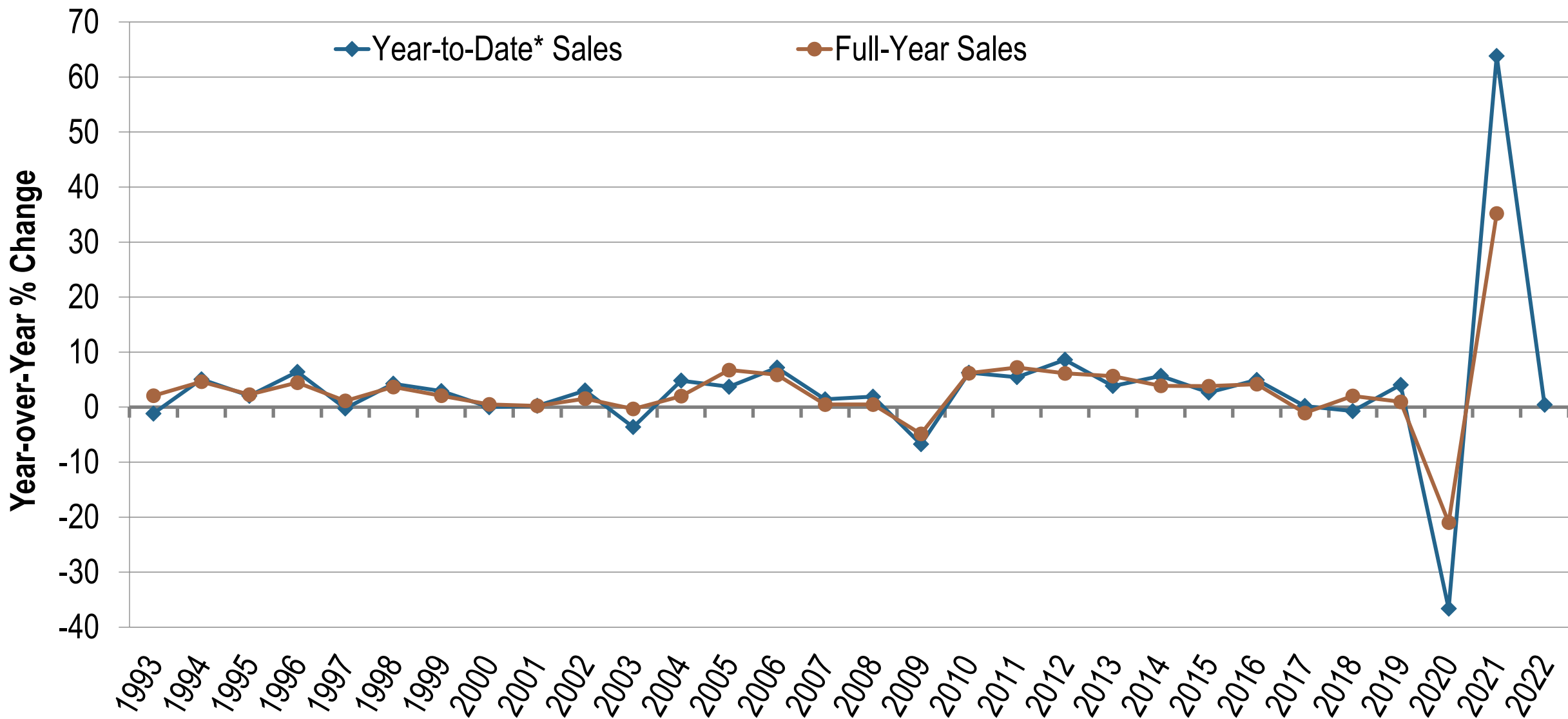
15 July 2022



Small Gain in Year-to-Date Shoe Store Sales Hints at Little to no Growth in 2022



Tepid Gain in Year-to-Date Shoe Store Sales Hints at Modest Growth in 2022





21,506.88 +132.05

78%

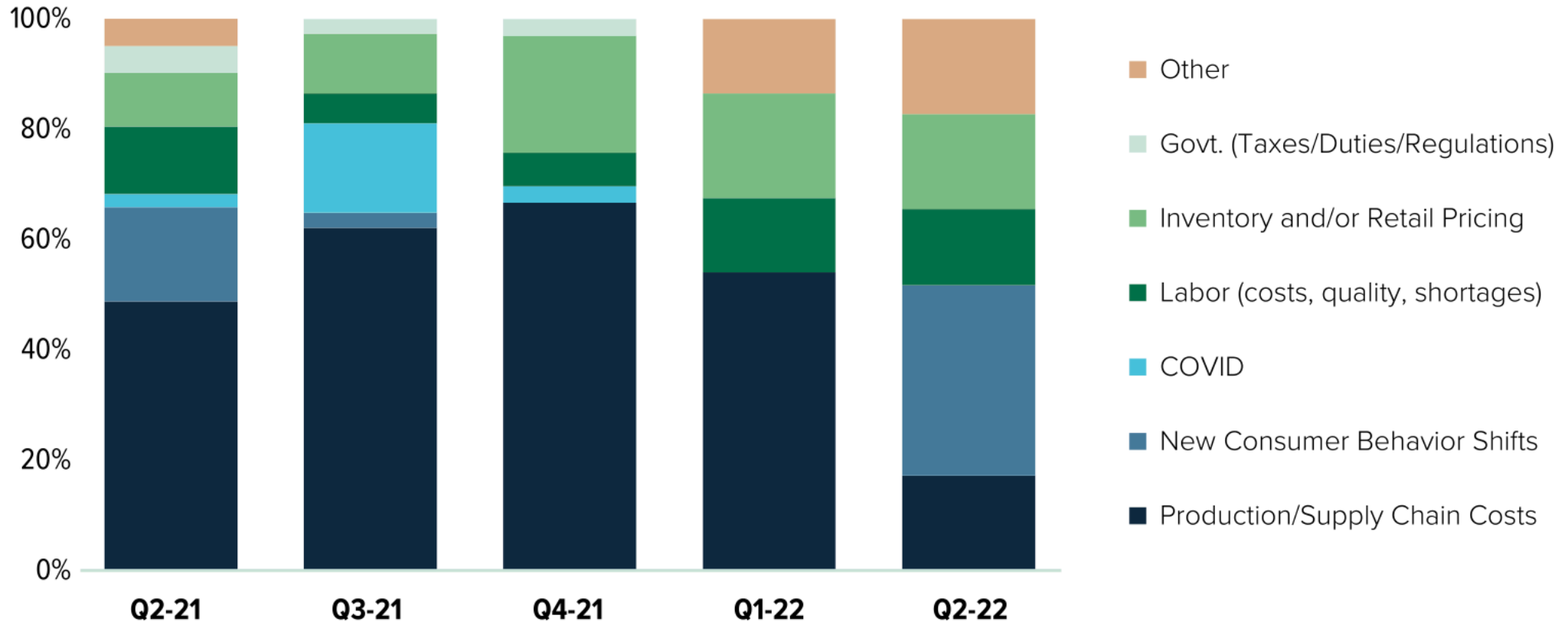
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SHOE EXECUTIVE BUSINESS OUTLOOK SURVEY

Q2 2022

SHOE EXECUTIVE BUSINESS OUTLOOK SURVEY

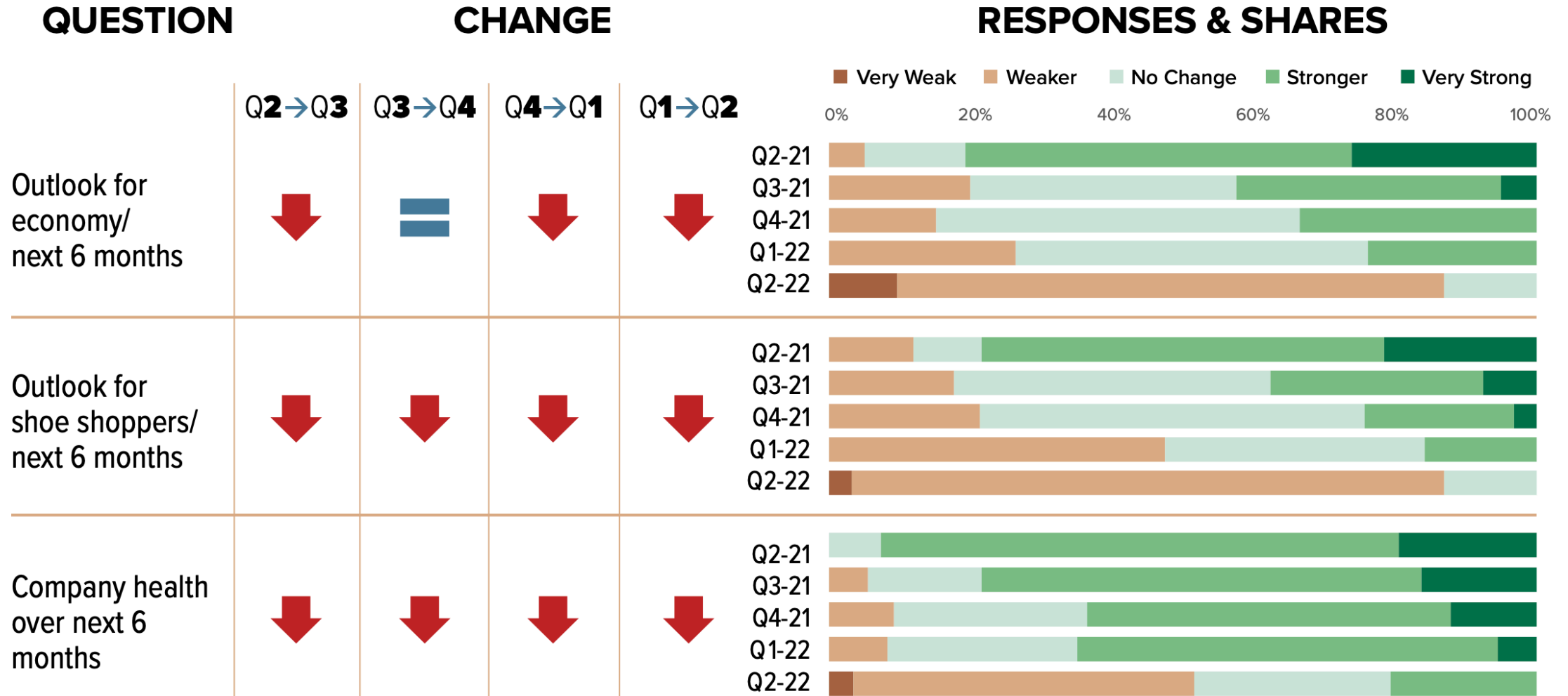
YOUR COMPANY'S BIGGEST ISSUE OVER THE NEXT 6 MONTHS



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SHOE EXECUTIVE BUSINESS OUTLOOK SURVEY

Q2 2022

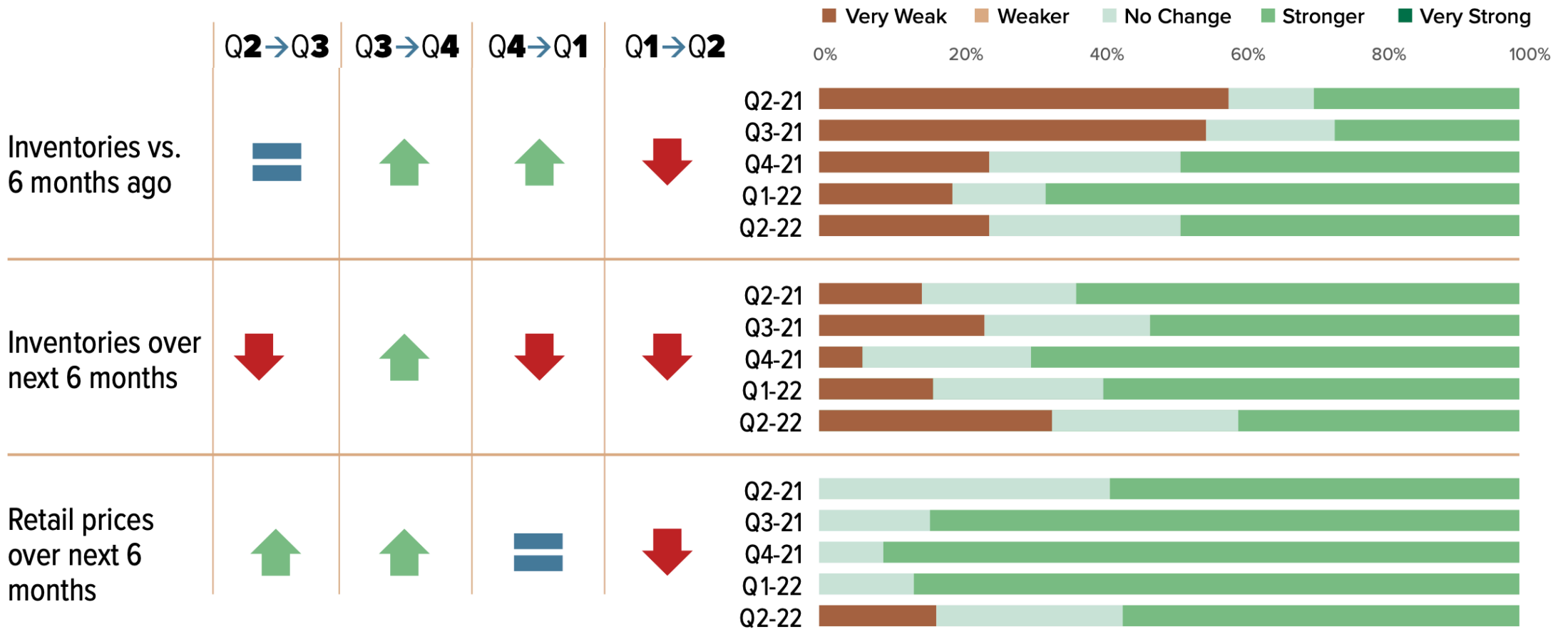


SHOE EXECUTIVE BUSINESS OUTLOOK SURVEY

QUESTION

CHANGE

RESPONSES & SHARES





Questions to Consider



- What do I do with all this data?
- Are there strategic risks we can take now that will pay off in the near and long term?
- What emerging technologies could change the game?
- Should I broaden my sourcing country search?
- Could there be future changes or surprises that could harm or benefit us?
- Where can I put my energy, that would change something?
- Why am I here?

Execs Sound Off on Sourcing and Supply Chain Strategy



- **Jung Yoon**, Divisional Vice President of Production and Sourcing, Michael Kors
- **Ronnie Robinson**, Chief Supply Chain Officer, DSW
- **Tom Iredale**, Senior Vice President, Sales & Marketing, Jones & Vining

*Moderated by **Jim Zwiers**, EVP, Wolverine Worldwide*



NETWORKING BREAK

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A Look at Sustainable Sourcing and Supply Chain Trends

- **Gretchen Jezerc**, Senior Vice President of Marketing, First Insight
 - **Chuck Rogers**, Americas Director, Technical Consulting & Supply Chain Solutions, Bureau Veritas
 - **Dr. Yuly Fuentes**, Project Manager, Fiber Technologies, MIT
- Moderated by **Andy Polk**, Senior Vice President, FDRA*



Shoe Supply Chain Key Updates

- **Ryan Gaither**, International Sales Executive, Managed Packaging Division, BillerudKorsnäs
- **Michael Hanrahan**, Senior Vice President, SuperDry Americas
- **Sandeep Khatua**, Global Technical Director, TÜV SÜD



Footwear Trade Updates and Strategy Today and Tomorrow

- **Suzanne Offerman**, Senior Product Marketing Manager, Thomson Reuters
- **Nicole Porpiglia**, Senior Manager, KPMG LLP, Trade & Customs
- **Kerry Rasmussen**, CCS Manager, Major Accounts, Farrow

*Moderated by **Thomas Crockett**, Vice President, Government Affairs*



The Disjointed Future of Footwear Trade

- **Matt Priest**, President & CEO, FDRA
- **Andy Polk**, Senior Vice President, FDRA

***LUNCH
NETWORKING
Stock Floor Tour***



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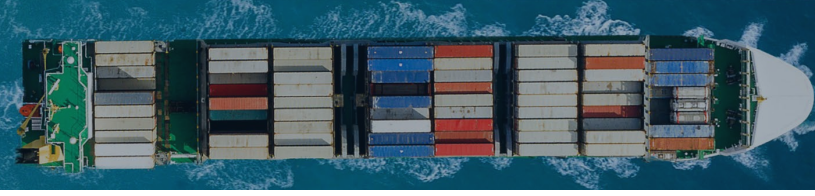


Planning for the Next Phase of the Insane Supply Chain



Pete Mento, Head of Procurement & Commercial Excellence International
Supply Chain, Wayfair

Insert Pete's Slides





A Conversation with the Port of Long Beach

Dr. Noel Hacegaba, Deputy Executive Director & COO, Port of Long Beach

Moderated by **Matt Priest**, President & CEO, FDRA



A Wholistic Look at the Movement of Goods

- **Michael Van Hagen**, Senior Vice President, Supply Chain, UWL
- **Donna Lemm**, Chief Commercial Officer, IMC
- **Michael Piza**, Senior Vice President, Corporate Business Development, Apex Logistics International Inc.

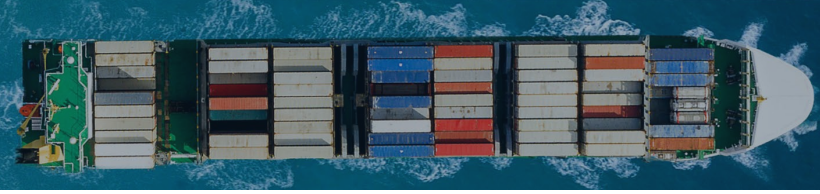
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