
Resilience of the Traditional Shoe Industry Amid Global Competition: An Empirical Study of Asyifa Lexus Jawa Shoes Cibaduyut Store

Cut Merlinda Shintya P^{1*}, Tazkia Amelia Rahmat², M Fauzan Fahriyadi³, Sofia Oktavia Dewi Fasha⁴, Muhamad Agung Aropah⁵, Kania Indah Sari⁶

¹⁻⁶ Pasundan University, Indonesia

Email: cutmerlinda42@gmail.com¹

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Abstract

This study examines the resilience of the traditional footwear industry amid intensifying global competition through an empirical case study of Asyifa Lexus Jawa Shoes in Cibaduyut, Indonesia. Employing a qualitative descriptive approach, the research draws on in-depth interviews and direct observation to analyze how changing consumer preferences, digital marketplaces, and imported footwear influence business sustainability. The findings reveal that declining interest in handmade leather shoes among younger consumers has pressured traditional producers to reconfigure their strategies. Asyifa Lexus Jawa Shoes responds through continuous design adaptation aligned with global trends, differentiation via customized shoe production, and specialization in institutional safety footwear for the Indonesian National Armed Forces and National Police. These strategies reduce exposure to price-based competition and create stable, trust-based market relationships. The study contributes to the literature on industrial and SME resilience by demonstrating how traditional enterprises can survive globalization through focused differentiation, dynamic capabilities, and niche market penetration. Practically, the findings offer strategic insights for traditional footwear SMEs seeking to maintain competitiveness while preserving artisanal identity.

Keywords: Traditional footwear industry, SME resilience, Product adaptation, Institutional market, Global competition.



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INTRODUCTION

The traditional footwear industry in Indonesia is undergoing a period of profound structural pressure as patterns of consumption increasingly reflect global lifestyles and digitally mediated purchasing habits. The rapid expansion of online marketplaces has transformed how consumers search for, compare, and acquire products, favoring speed, price efficiency, and visual trends over craftsmanship and durability, as evidenced in studies on marketplace preference dynamics in Indonesia (Li et al., 2025). These shifts have gradually displaced locally produced footwear from the everyday consumption choices of urban consumers. As a consequence, traditional shoe producers are compelled to operate within a market logic that is fundamentally different from the one that originally sustained them.

Cibaduyut, historically recognized as one of Indonesia's most prominent leather footwear clusters, illustrates this transformation in a particularly visible manner. Once sustained by strong cultural capital, intergenerational skills, and dense production networks, the area now faces declining symbolic and economic relevance among younger consumers (Sebayang et al., 2015). Local identity rooted in Sundanese cultural values has struggled to compete with standardized global aesthetics promoted through digital platforms (Yuniarti et al., 2022). This erosion of cultural attachment has weakened the cluster's competitive position within both national and regional markets.

One of the most affected business units within this ecosystem is the Asyifa Lexus Jawa Shoes Store, which has operated continuously since 2005. The enterprise serves a dual market, producing leather flats and heels for young consumers while simultaneously supplying functional footwear for institutional clients such as the Indonesian National Armed Forces and the Indonesian National Police.

Despite this diversified customer base, the store remains deeply exposed to shifts in retail behavior driven by digital marketplaces and imported goods. The long production cycles and rising costs associated with handmade leather footwear intensify the vulnerability of such businesses in price-sensitive markets.

Empirical research consistently indicates that younger consumers exhibit a stronger preference for fashionable products that are immediately accessible through large-scale e-commerce platforms (Li et al., 2025). This preference is reinforced by the influx of low-priced imported footwear with rapidly changing designs, which further intensifies competitive pressure on local artisans (Molnár & Lengyel, 2016). In Cibaduyut, this phenomenon has accelerated the displacement of locally made shoes from mainstream consumption channels. The cumulative effect is a gradual weakening of the area's reputation as a national leather footwear center.

Beyond market competition, the sustainability of traditional footwear enterprises is also shaped by internal adaptive capacity and entrepreneurial competence. Prior studies on the Cibaduyut creative shoe industry demonstrate that entrepreneurial skills play a decisive role in generating competitive advantage amid structural change (Destany et al., 2022). Enterprises that fail to innovate in branding, distribution, and customer engagement tend to experience sharper declines in market share. This condition underscores the importance of strategic responsiveness rather than reliance on historical reputation alone.

Comparative evidence from other craft-based industries highlights that resilience is rarely achieved through resistance to change, but rather through selective adaptation. Research on Kampoeng Batik Laweyan shows how community-based strategies enabled survival following industrial decline by reorganizing production, redefining market orientation, and revitalizing cultural narratives (Widodo & Putra, 2024). Similar patterns were observed among bamboo craftsmen in Gunungkidul during the COVID-19 crisis, where livelihood strategies and collective adjustments supported economic recovery (Utomo et al., 2022). These findings suggest that resilience is a dynamic process shaped by learning, collaboration, and strategic reconfiguration.

At the international level, the footwear industry provides numerous examples of how local producers respond to global competitive pressures. Studies from Southern Europe and Portugal reveal that resilience often emerges through business model transformation, niche specialization, and strategic responses to external shocks (Miranda & Roldán, 2022; Oliveira et al., 2025). Historical analyses of post-socialist Hungary further demonstrate how path dependence influences the capacity of footwear clusters to integrate into global production networks (Molnár & Lengyel, 2016). These insights offer valuable analytical lenses for understanding the Indonesian context.

Based on these considerations, this study addresses two central questions concerning the sustainability of traditional footwear enterprises in Cibaduyut. The first examines how changing consumer preferences and the ease of access to imported products influence the long-term viability of traditional shoe businesses. The second explores the adaptation and resilience strategies employed by business actors, focusing on the case of Asyifa Lexus Jawa Shoes Store. From an academic standpoint, this research contributes to broader discussions on MSME resilience within globalized markets, while practically offering strategic insights for traditional footwear producers seeking to remain competitive in an increasingly digital and import-dominated environment.

RESEARCH METHOD

This study adopts a qualitative research design to obtain an in-depth and nuanced understanding of business dynamics within the traditional footwear industry, particularly in relation to structural change and competitive pressure. A qualitative descriptive approach was selected due to its capacity to systematically and accurately portray social and economic phenomena as they occur in real settings, allowing for careful interpretation of adaptation processes within artisanal enterprises. The research was conducted at Asyifa Lexus Jawa Shoes, located in the Cibaduyut footwear cluster in Bandung, with the business owner serving as the primary informant given his continuous involvement in the production and marketing of handmade leather shoes since 2005. Data were collected through in-depth, semi-structured interviews to capture experiential insights into challenges and strategic responses, complemented by direct observation of daily business activities to ensure contextual richness and analytical credibility.

RESULTS AND DISCUSSIONS

Shifting Consumer Preferences and Their Implications for the Resilience of Traditional Footwear Enterprises

The findings of this study demonstrate a substantial transformation in consumer preferences that has directly reshaped the competitive landscape of the traditional footwear industry in Cibaduyut. Interviews with the owner of Asyifa Lexus Jawa Shoes indicate that younger consumers increasingly favor footwear characterized by modern aesthetics, competitive pricing, and immediate availability through digital marketplaces. This tendency aligns with broader empirical evidence showing that online platforms such as Tokopedia and Shopee significantly influence purchasing decisions by emphasizing convenience, visual appeal, and promotional pricing (Ali et al., 2025). As a result, handcrafted leather shoes, which require longer production cycles and higher-quality raw materials, are gradually marginalized within mainstream consumption patterns.

This shift in preference reflects deeper lifestyle changes in which efficiency, trend alignment, and digital accessibility dominate consumer rationality. Footwear consumption is no longer primarily evaluated through durability and material quality, but through design novelty, brand visibility, and ease of transaction. Studies on the Cibaduyut footwear cluster suggest that this transformation has weakened the traditional cultural attachment that once anchored consumer loyalty to local products (Sebayang et al., 2015; Yuniarti et al., 2022). The erosion of such cultural capital has intensified the vulnerability of traditional producers who historically relied on reputation and craftsmanship rather than aggressive market positioning.

From the perspective of Asyifa Lexus Jawa Shoes, the consequences of these changes are both immediate and structural. The owner reported a marked decline in demand for standard handmade products, particularly those targeting casual daily use, as imported footwear floods digital platforms at significantly lower prices. This observation resonates with international findings that global production networks enable imported footwear to rapidly penetrate local markets, creating asymmetric competition for small-scale producers (Molnár & Lengyel, 2016). Over time, this dynamic not only suppresses sales volumes but also undermines the symbolic status of Cibaduyut as a national center for leather footwear craftsmanship.

To substantiate these qualitative insights, Table 1 presents a synthesis of primary field data, official reports, and findings from previous studies on consumer preferences and market dynamics. The table is positioned after this paragraph to provide empirical grounding for the discussion. It highlights the contrast between traditional handcrafted footwear and imported products in terms of price, production time, design turnover, and preferred purchasing channels, drawing on field interviews conducted by the researcher in 2025, national marketplace studies (Ali et al., 2025), and cluster-level analyses (Sebayang et al., 2015).

Table 1. Comparison of Traditional Handmade Footwear and Imported Footwear in the Indonesian Market

Indicator	Traditional Handmade Footwear (Cibaduyut)	Imported Footwear
Average Price Range	Medium–High	Low–Medium
Production Time	7–14 days	Mass-produced, immediate availability
Design Cycle	Limited, seasonal	Rapid, trend-driven
Main Sales Channel	Offline stores, direct orders	Online marketplaces
Primary Consumer Segment	Institutional clients, niche consumers	Youth and mass market
Source	Field interviews (2025); Sebayang et al. (2015)	Ali et al. (2025)

The data presented in Table 1 reinforce the structural imbalance faced by traditional footwear enterprises, where cost efficiency and speed consistently favor imported products. This imbalance

mirrors patterns observed in other footwear clusters across Europe and Latin America, where local producers struggle to compete on price and volume while global players dominate standardized segments (Miranda & Roldán, 2022; Viana et al., 2024). In such conditions, resilience is less about resisting change and more about redefining competitive parameters. The Cibaduyut case demonstrates how failure to reposition products strategically accelerates marginalization within digital markets.

Despite these pressures, the study also reveals that shifting consumer preferences do not eliminate demand for traditional footwear altogether. Instead, demand becomes increasingly segmented, with smaller but more stable market niches valuing comfort, customization, and long-term use. The owner of Asyifa Lexus Jawa Shoes noted continued demand from institutional clients and individual customers seeking made-to-order footwear tailored to specific functional needs. Similar niche-oriented survival strategies have been documented in footwear clusters in Portugal and Brazil, where specialization and differentiation supported long-term resilience (Ferreira, 2018; Viana et al., 2024).

This segmentation opens strategic space for traditional producers to reposition themselves away from mass-market competition. Prior research emphasizes that entrepreneurial competence plays a critical role in translating such opportunities into sustainable competitive advantage (Destany et al., 2022). Businesses that invest in design adaptation, customer relationship management, and selective digital engagement are better positioned to retain relevance. In this sense, consumer preference shifts function not only as external threats but also as catalysts for strategic learning and innovation.



Figure 1. Porter's Generic Strategies

The discussion can be further contextualized by placing Figure 1. Porter's Generic Strategies after this paragraph, illustrating how Asyifa Lexus Jawa Shoes increasingly gravitates toward differentiation and focus strategies rather than cost leadership. Traditional footwear producers lack structural capacity to compete on price, making differentiation through quality, customization, and cultural narratives a more viable strategic path. This strategic orientation echoes resilience trajectories observed in craft-based industries such as batik and bamboo handicrafts, where adaptive specialization mitigated the impacts of market decline (Widodo & Putra, 2024; Utomo et al., 2022).

From a broader theoretical perspective, these findings strengthen the concept of industrial resilience as a dynamic capability shaped by continuous interaction between firms and external environments. Shifting consumer preferences represent exogenous pressures that compel SMEs to realign production systems, marketing logics, and value propositions. Comparative studies across sectors confirm that resilience emerges through adaptive recombination of existing resources rather than radical transformation alone (Dahles & Susilowati, 2015; Huang & Farboudi Jahromi, 2021). In the footwear industry, this often entails blending local craftsmanship with contemporary design and selective digital presence.

At the global level, resilience-oriented strategies in footwear industries increasingly intersect with innovation and sustainability agendas. Scenario-based studies highlight how MSMEs integrate product differentiation and strategic foresight to remain competitive under uncertainty (Ghalambor & Firoozpour, 2025). Research on exogenous shocks further underscores the importance of flexibility in supply chains and business models as foundations of long-term survival (Oliveira et al., 2025; Moktadir et al., 2023). These insights resonate strongly with the adaptive challenges faced by traditional footwear enterprises in Indonesia.

In sum, the impact of shifting consumer preferences on traditional footwear products extends beyond declining demand figures. It redefines the strategic space in which traditional producers operate,

compelling them to abandon mass-market aspirations and focus on differentiated value creation. For Asyifa Lexus Jawa Shoes and similar enterprises in Cibaduyut, resilience lies in the ability to reinterpret tradition as a competitive asset rather than a constraint. This transformation confirms that industrial resilience is not a static condition, but an ongoing process shaped by market evolution, entrepreneurial agency, and the strategic use of cultural and material resources.

Product Adaptation and Design Innovation as a Foundation of Competitive Resilience

The survival of Asyifa Lexus Jawa Shoes within an increasingly globalized footwear market is rooted in deliberate product adaptation and continuous design innovation rather than chance or temporary market protection. Field evidence shows that the enterprise actively monitors international footwear trends and selectively translates them into locally produced designs that remain compatible with artisanal leather craftsmanship. This practice reflects a broader pattern identified in creative clusters, where responsiveness to external market signals determines long-term viability (Sebayang et al., 2015; Yuniarti et al., 2022). In this sense, innovation functions as a strategic mechanism to sustain relevance without abandoning local production identity.

Interviews with the store owner indicate that design renewal is treated as an ongoing process rather than a periodic adjustment. Product lines are regularly refined in terms of silhouette, color composition, and finishing details to reflect contemporary tastes observed in global marketplaces. Such sensitivity to trend evolution mirrors consumer behavior research showing that younger buyers prioritize visual relevance and stylistic currency when making purchasing decisions online (Ali et al., 2025). The capacity to respond to these preferences strengthens the store's positioning within a market increasingly shaped by digital exposure and rapid aesthetic turnover.

From a strategic management perspective, this approach aligns with the logic of dynamic capability, where firms continuously reconfigure internal resources to address environmental volatility. Comparative studies of footwear industries in Europe and Latin America confirm that enterprises capable of design adaptation demonstrate higher resilience under competitive pressure (Miranda & Roldán, 2022; Viana et al., 2024). Asyifa Lexus Jawa Shoes operationalizes this capability by integrating traditional artisanal skills with contemporary design references rather than pursuing radical technological transformation. This hybrid model allows the business to maintain authenticity while remaining commercially attractive.

Design adaptation also serves as a response to structural asymmetries in global footwear competition. Imported products benefit from economies of scale and rapid design replication, placing traditional producers at a disadvantage in cost-based competition (Molnár & Lengyel, 2016). By focusing on design differentiation rather than price parity, Asyifa Lexus Jawa Shoes avoids direct confrontation with mass-produced imports. This strategic positioning resonates with historical analyses showing that localized industries survive globalization by redefining value creation around uniqueness and specialization (Frederick & van Nederveen Meerkerk, 2023).

The effectiveness of this strategy is reinforced by entrepreneurial competence at the firm level. Research on the Cibaduyut footwear industry highlights that entrepreneurial skills, particularly in innovation management and market sensing, significantly influence competitive advantage (Destany et al., 2022). The owner's long-term experience since 2005 enables informed decisions regarding which trends to adopt and which to avoid. This selective adaptation minimizes the risk of overstandardization that could erode artisanal distinctiveness.

To strengthen the analytical basis of this discussion, Table 2 is presented after this paragraph as empirical support. The table consolidates primary field data from interviews conducted in 2025, official industry reports, and findings from prior research on footwear and craft-based industries. It compares innovation-related variables between adaptive traditional producers and less adaptive counterparts, illustrating how design responsiveness correlates with market resilience (Ferreira, 2018; Oliveira et al., 2025).

Table 2. Design Adaptation and Innovation Characteristics in Traditional Footwear Enterprises

Dimension	Adaptive Traditional Producers	Less Adaptive Producers
Frequency of Design Updates	Regular, trend-informed	Infrequent, tradition-bound

Dimension	Adaptive Traditional Producers	Less Adaptive Producers
Use of Market Information	Active monitoring of global trends	Limited reliance on local norms
Product Differentiation	High, design and finishing focused	Low, standardized models
Market Performance	Stable niche demand	Declining general demand
Source	Field data (2025); Ferreira (2018)	Oliveira et al. (2025)

The data in Table 2 indicate that design adaptation functions as a buffer against declining mass-market demand. This finding aligns with studies on resilience in craft and manufacturing sectors, where innovation is less about technological disruption and more about contextual refinement of existing capabilities (Swaminathan, 2022). In Asyifa Lexus Jawa Shoes, innovation emerges through iterative learning embedded in daily production practices. Such incremental innovation is particularly suited to small and medium-sized enterprises operating under resource constraints.

Design innovation further supports the firm's engagement with digital consumption spaces without fully migrating to mass online retail. While large marketplaces prioritize standardized products, adaptive design enables traditional producers to use digital platforms selectively for visibility rather than price competition (Srivastava & Kandikonda, 2025). This strategy reduces exposure to destructive price wars while maintaining relevance among digitally oriented consumers. Similar patterns have been observed in resilient SMEs navigating post-crisis markets (Huang & Farboudi Jahromi, 2021).

At a broader level, product adaptation contributes to systemic resilience within the Cibaduyut footwear cluster. Cluster-based studies demonstrate that collective survival depends on the cumulative adaptive behavior of individual firms rather than uniform strategic conformity (Sebayang et al., 2015; Viana et al., 2024). Asyifa Lexus Jawa Shoes exemplifies how localized innovation can sustain cluster identity amid global pressures. This localized resilience echoes experiences in batik and bamboo craft communities that reoriented production without abandoning cultural roots (Widodo & Putra, 2024; Utomo et al., 2022).

The emphasis on adaptive design situates Asyifa Lexus Jawa Shoes within a wider discourse on resilience as a value-generating process. Resilience-oriented strategies have been shown to enhance long-term market value by fostering trust, distinctiveness, and adaptive legitimacy (Swaminathan, 2022; Dahles & Susilowati, 2015). In the footwear sector, resilience is increasingly associated with strategic flexibility rather than scale expansion (Miranda Encarnación & Roldán, 2020; Ghalambor & Firoozpour, 2025). This analysis confirms that product adaptation and design innovation constitute a foundational pillar of Asyifa Lexus Jawa Shoes' continued existence within global market competition.

Specialized Expertise and Institutional Market Penetration as a Stability-Oriented Resilience Strategy

The third strategic pillar underpinning the resilience of Asyifa Lexus Jawa Shoes lies in its deliberate specialization in institutional footwear, particularly safety shoes for the Indonesian National Armed Forces (TNI) and the Indonesian National Police (Polri). This segment provides a markedly different demand structure compared to the volatile consumer fashion market, as purchasing decisions are driven by functional standards, durability, and reliability rather than short-lived trends. Field findings indicate that institutional contracts have functioned as a stabilizing backbone for the business during periods of declining retail demand. Similar stability-oriented strategies have been identified in resilient footwear clusters that deliberately anchor part of their production in regulated or professional markets (Miranda & Roldán, 2022; Ferreira, 2018).

Institutional footwear production requires strict adherence to technical specifications, material standards, and performance requirements. Asyifa Lexus Jawa Shoes has accumulated specialized knowledge in safety shoe construction, including reinforced soles, durable leather selection, and ergonomic design suited for extended operational use. This accumulated expertise represents a form of tacit knowledge that is difficult for mass producers to replicate quickly, particularly those focused on fashion-oriented output (Molnár & Lengyel, 2016). Over time, this specialization has strengthened the firm's credibility and reduced uncertainty in institutional procurement relationships.

From a strategic management standpoint, this orientation reflects a focused differentiation strategy rather than broad market engagement. While global brands compete aggressively in consumer

markets through cost efficiency and branding scale, institutional segments prioritize proven performance and supplier trustworthiness. Research on SME resilience shows that firms embedded in trust-based, long-term buyer relationships demonstrate higher resistance to market shocks (Dahles & Susilowati, 2015; Huang & Farboudi Jahromi, 2021). In this context, Asyifa Lexus Jawa Shoes benefits from repeat orders and predictable demand cycles that mitigate exposure to fluctuating consumer preferences.

The relevance of institutional focus becomes particularly visible during periods of external disruption. Studies on resilience across manufacturing sectors highlight that firms serving professional or institutional clients were better insulated from sudden demand contractions during crises such as the COVID-19 pandemic (Utomo et al., 2022; Moktadir et al., 2023). While retail footwear sales experienced sharp volatility, demand for safety and operational footwear remained comparatively stable. This pattern reinforces the strategic value of maintaining a balanced customer portfolio that includes non-discretionary market segments.

Entrepreneurial competence plays a critical role in sustaining this institutional positioning. Prior research on the Cibaduyut footwear industry emphasizes that competitive advantage emerges when entrepreneurial skills are aligned with market-specific requirements (Destany et al., 2022). The owner's long-standing experience enables consistent quality control and compliance with institutional standards, which in turn sustains client trust. This competence transforms technical compliance into a strategic asset rather than a mere operational obligation.

To empirically reinforce this discussion, Table 3 is presented after this paragraph. The table integrates primary field data from 2025, official procurement characteristics, and findings from earlier resilience studies to compare institutional and general consumer market attributes. This comparison illustrates how specialization in institutional markets contributes to revenue stability and long-term resilience (Sebayang et al., 2015; Miranda Encarnación & Roldán, 2020).

Table 3. Comparison Between Institutional and General Consumer Footwear Markets

Aspect	Institutional Market (TNI/Polri)	General Consumer Market
Demand Stability	High, contract-based	Volatile, trend-driven
Purchase Criteria	Functionality, durability, standards	Design, price, trends
Price Sensitivity	Moderate	High
Relationship Duration	Long-term, repeat orders	Short-term, transactional
Source	Field data (2025); Sebayang et al. (2015)	Ali et al. (2025)

The data in Table 3 underscore how institutional market penetration reduces dependency on unpredictable consumer demand. This strategic insulation echoes findings from global footwear clusters, where firms serving professional niches exhibited stronger survival rates across economic cycles (Ferreira, 2018; Viana et al., 2024). Rather than pursuing rapid expansion, these firms prioritize consistency, reliability, and reputational capital. Asyifa Lexus Jawa Shoes follows a comparable trajectory within the Indonesian context.

The trust developed with institutional clients extends beyond transactional value and evolves into relational capital. Customer loyalty theory suggests that sustained satisfaction rooted in performance reliability generates repeat engagement and informal endorsement within organizational networks (Griffin, 2005, cited conceptually). In the case of TNI and Polri, continued use of locally produced safety shoes signals institutional confidence in domestic craftsmanship. This trust-based loyalty offers protection from price competition that typically undermines SMEs in open consumer markets.

At the cluster level, institutional specialization also contributes to collective resilience. Sebayang et al. (2015) argue that diversification of market orientation within industrial clusters strengthens overall competitiveness by reducing uniform exposure to global market shocks. When some firms maintain institutional or niche markets, the cluster retains productive capacity even during downturns in consumer demand. Asyifa Lexus Jawa Shoes exemplifies this stabilizing role within the Cibaduyut footwear ecosystem.

From a global comparative perspective, similar patterns are evident in Southern Europe and emerging economies, where footwear producers maintain institutional or occupational segments alongside consumer lines (Miranda & Roldán, 2022; Ghalambor & Firoozpour, 2025). These strategies demonstrate that resilience does not require constant innovation in visible consumer markets, but can also emerge through depth of expertise in less visible yet stable segments. Such depth-based resilience aligns with historical evidence of localized industries surviving global competition through specialization rather than scale (Frederick & van Nederveen Meerkerk, 2023).

The penetration of institutional markets through specialized safety footwear production represents a critical resilience mechanism for Asyifa Lexus Jawa Shoes. This strategy provides revenue stability, strengthens trust-based relationships, and shields the enterprise from volatile consumer trends. More broadly, it illustrates how traditional footwear SMEs can sustain existence in global competition by aligning artisanal capability with functional, professional demand. The findings reaffirm that resilience in traditional industries is constructed through strategic focus, accumulated expertise, and long-term relational commitment rather than market breadth alone.

CONCLUSION

This study demonstrates that the resilience of the traditional footwear industry, as illustrated by Asyifa Lexus Jawa Shoes in Cibaduyut, is constructed through deliberate strategic adaptation rather than passive endurance. Shifts in consumer preferences toward digitally accessible and trend-driven products have undeniably reduced mass-market demand for handmade footwear, yet they have simultaneously encouraged strategic repositioning. Through continuous design adaptation, product differentiation via customization, and specialization in institutional safety footwear, the enterprise has successfully mitigated competitive pressures from global brands. These strategies strengthen market relevance, stabilize revenue streams, and preserve artisanal value within a globalized economy. The findings confirm that resilience in traditional industries is a dynamic process shaped by entrepreneurial competence, niche orientation, and the ability to align local craftsmanship with evolving market structures.

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