



SOCIO-ECONOMIC IMPACT

GEOGRAPHICAL INDICATION



BRASIL • SÃO PAULO



# BIRIGUI.

*Children's Footwear*

**A Socio-Economic Survey Report**



## Dreams

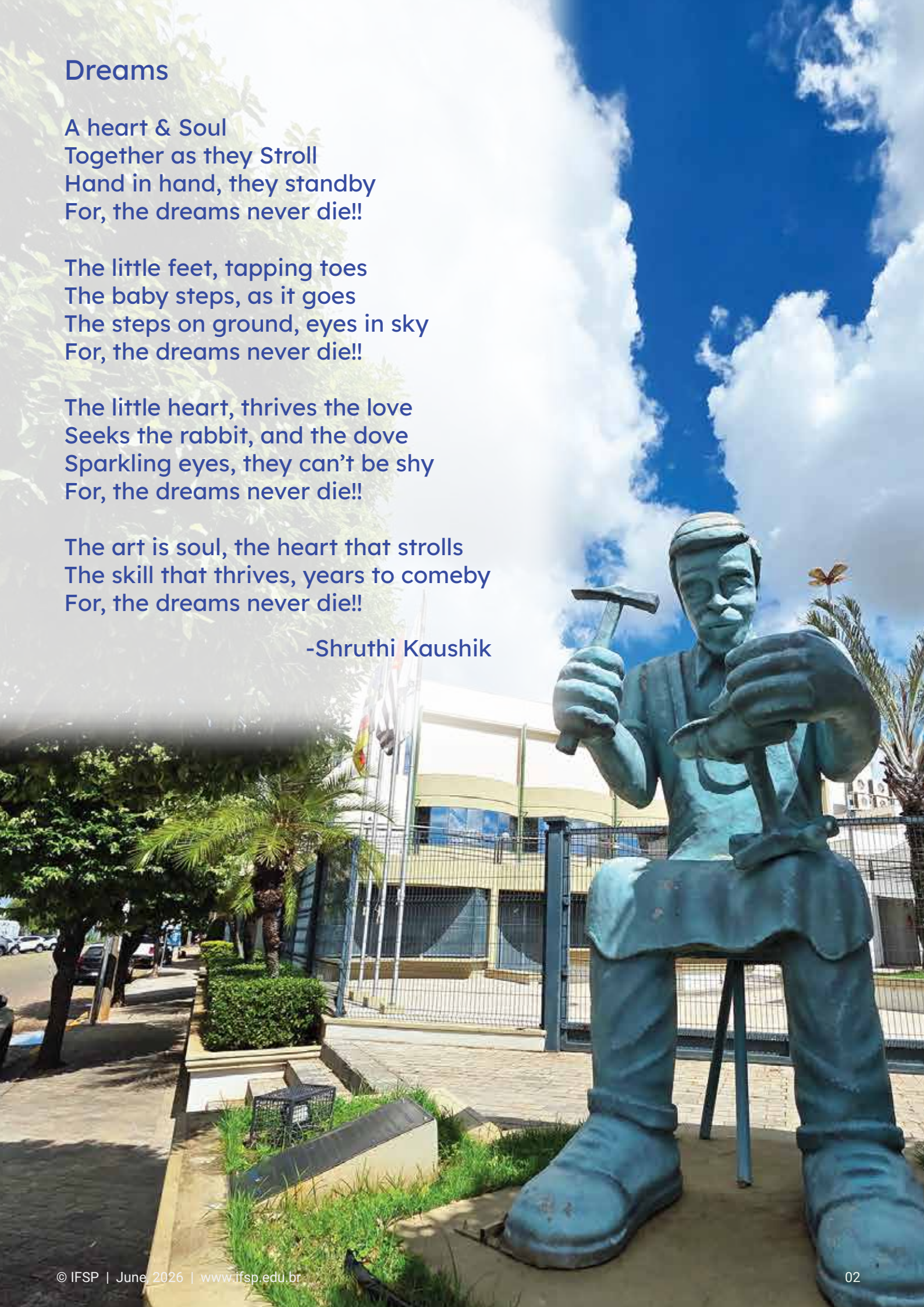
A heart & Soul  
Together as they Stroll  
Hand in hand, they stand by  
For, the dreams never die!!

The little feet, tapping toes  
The baby steps, as it goes  
The steps on ground, eyes in sky  
For, the dreams never die!!

The little heart, thrives the love  
Seeks the rabbit, and the dove  
Sparkling eyes, they can't be shy  
For, the dreams never die!!

The art is soul, the heart that strolls  
The skill that thrives, years to come by  
For, the dreams never die!!

-Shruthi Kaushik



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Organization for an International  
Geographical Indications Network

A manufacturing cluster made of men, women and local know-how, that decided, more than six decades ago, to focus in making shoes for children. Birigui in Brazil is this.

The companies and workers of the GI Birigui have a protected name and sixty-five years of accumulated knowledge. The production system combines traditional craftsmanship and innovative technologies. Several elements for a successful craft/industrial GI seem to be there.

However, RIPA's and IFSP socio - economic report identifies challenges related to income adequacy and young generations engagement within the GI value chain. Once again, these issues are not unique to Birigui and Brazil nor to the GI craft/industrial sector. What this report does is to clearly identify those challenges, propose pragmatic recommendations and show how the GI approach focused on a solid association can help address them.

The 'Metrics that Matter' framework is an interesting approach. A composite score of 77.7% sits alongside an income adequacy score of 62.6% - the only parameter below the stability threshold and a youth engagement score that signals a workforce crisis within a generation if left unaddressed. These are not contradictions; they are the honest portrait of a GI at a cross-roads.

I commend this study also because it is the result of a partnership born within oriGIn. RIPA and IFSP are part of the world oriGIn community and had the chance to meet and interact in the framework of our activities. As a global GI coalition, oriGIn pursues the objective to strengthen global GI protection. Likewise, through its communities, oriGIn promotes the exchange of best practices and the advancement of research and cooperation in the field of GIs.

Massimo Vittori  
Managing Director, oriGIn  
Geneva, 12 June 2026

# Executive Summary

The Geographical Indication (GI) of children's footwear from Birigui represents one of Brazil's most specialized and economically significant manufacturing clusters within the footwear sector in Brazil.

The Birigui GI embodies decades of industrial expertise, technological adaptation, entrepreneurial culture, and regional identity. Internationally recognized as one of the largest hubs for children's footwear production in Latin America, Birigui developed a distinctive production ecosystem based on technical specialization, quality manufacturing, and accumulated know-how focused on the comfort, safety, and ergonomic needs of children.

This report is based on a comprehensive field survey conducted between March 19 and March 20, 2026, covering more than 30 artisans, helpers, and value chain participants, ensuring a broad-based representation of the ecosystem. On the same occasion, we celebrated the third anniversary of the GI recognition and presented the project being carried out by the Federal Institute of São Paulo in collaboration with the Reinforce Intellectual Property Association.

The origins of the cluster date back to 1958 with the establishment of the first children's footwear factory in the municipality. Over subsequent decades, the sector expanded into a consolidated industrial arrangement composed of manufacturers, component suppliers, machinery providers, logistics operators, technical schools, and business support organizations. The GI recognizes not only the geographical origin of the products but also the collective manufacturing culture and specialized technical expertise

historically developed within the region. Today, the sector sustains thousands of direct and indirect jobs and plays a central role in the socioeconomic development of the municipality and surrounding areas.

The study demonstrates that the value chain of Birigui's children's footwear is highly integrated and innovation-oriented. The production system combines industrial technologies, automated processes, and traditional craftsmanship, ensuring product quality, productivity, and market responsiveness. Specialized stages such as design, modeling, cutting, stitching, assembly, and quality control are supported by skilled labor and continuous technical improvement. Product development is strongly oriented toward children's anatomical, ergonomic, and safety requirements, which contributes to the reputation of Birigui footwear in domestic and international markets.

Despite its strong industrial base and established reputation, the sector faces important challenges related to income adequacy and youth engagement. Generational succession is a growing concern, as many young people are not attracted to the sector due to limited income prospects and increasing competition. Companies must balance market competitiveness with the need to offer fair wages and retain skilled workers. Without sufficient economic returns, attracting new generations and ensuring the long-term sustainability of the sector become increasingly difficult.

At the same time, significant opportunities exist for strengthening the global positioning of Birigui's GI. The growing demand for quality-driven, safe, sustainable, and traceable products creates favorable conditions for expanding the market





recognition of the territory's specialized footwear production. Strategic investments in collective branding, international promotion, innovation, sustainability practices, digital commerce, and integration with industrial tourism can enhance value creation across the cluster. The GI also offers potential for reinforcing consumer trust by associating the product with certified origin, specialized know-how, and consistent quality standards.

This report highlights the need to move beyond a GI approach focused solely on

protection toward a broader value creation ecosystem based on competitiveness, innovation, market access, and institutional coordination. In addition to economic and productive challenges, it is essential to strengthen public awareness, including consumers and local stakeholders regarding the meaning and importance of the Geographical Indication seal as an instrument for territorial valorization, guarantee of origin, differentiated quality, and preservation of collective know-how. Expanding public understanding of the GI can contribute to increasing product recognition,

strengthening regional identity, and enhancing the perceived value of the product in both domestic and international markets. Under the perspective of "Legacy to Competitiveness and Sustainability," the GI of children's footwear from Birigui has the potential to consolidate itself as an internationally recognized model of industrial specialization, territorial identity, and sustainable regional development, provided that coordinated efforts among public institutions, private actors, and sector organizations continue to strengthen the ecosystem.

# Introduction & Background

Located in the northwest region of the State of São Paulo, Birigui has an estimated population of approximately 125,000 inhabitants and is widely recognized as the “Brazilian Capital of Children’s Footwear.” The municipality has a diversified economy based on industry, commerce, services, and agribusiness, but the footwear sector represents its main economic activity and the foundation of its regional identity and development.

The Geographical Indication (GI) of children’s footwear from Birigui, registered by the Brazilian National Institute of Industrial Property (INPI), recognizes the historical relationship between the territory and the specialized production of children’s shoes. Since the establishment of the first footwear factory in 1958, the municipality has developed one of the most important industrial clusters in Brazil and Latin America dedicated to children’s footwear manufacturing.

The productive strength of the sector is closely linked to the **SINBI – Sindicato das Indústrias do Calçado e Vestuário de Birigui**, the legal GI representative in Brazil, which plays a strategic role in supporting innovation, workforce qualification, export promotion, institutional coordination, and the strengthening of the GI. The cluster currently includes approximately 300 to 350 industries directly and indirectly associated with footwear production, generating between 16,000 and 20,000 direct jobs. Annual production is estimated at around 45 to 60 million pairs of shoes, corresponding to more than half of Brazil’s children’s footwear production.

The geographical delimitation of the GI encompasses Birigui and its surrounding



productive area, where a highly integrated manufacturing ecosystem has been consolidated. This system includes footwear manufacturers, suppliers of raw materials and components, machinery companies, logistics providers, technical schools, and specialized service firms. The region developed accumulated know-how focused on comfort, ergonomics, safety, durability, and design adapted to children’s needs.

In addition to its strong domestic market presence, Birigui exports children’s footwear to countries in Latin America, North America, Europe, and other international markets. Over time, local products have reached more than 70 countries, reinforcing the international reputation and competitiveness of the cluster.

Beyond its economic relevance, the footwear industry became part of Birigui’s social and cultural identity, influencing employment generation, entrepreneurship, urban development, and regional visibility. At the same time, the sector faces challenges related to global competition, rising production costs, technological modernization, and the need to strengthen public understanding of the importance of the Geographical Indication seal as a tool for territorial valorization, product differentiation, and sustainable regional development.

# Historical & Cultural Significance



The Geographical Indication (GI) of children's footwear from Birigui represents the official recognition of a productive tradition built over decades in the municipality, which has become one of the largest children's footwear manufacturing hubs in Brazil and Latin America. The registration was granted by the Brazilian National Institute of Industrial Property (INPI) in 2023, recognizing the historical connection between the territory and the production of children's footwear.

The footwear culture of Birigui began in 1958 with the establishment of the first factory specialized in children's shoes, Ramos & Assumpção. From that moment onward, the industry expanded rapidly, driving the city's economic, social and urban development. Over the decades, several family-owned businesses emerged and consolidated their own know-how, based on specialization, local entrepreneurship, and the transmission of technical knowledge across generations.

More than simply an economic activity, footwear production became part of Birigui's cultural identity. Urban

monuments, industry events, trade fairs, and even public space elements, such as the traditional shoe-shaped public telephones, symbolize the city's strong connection to the children's footwear sector. The municipality developed a productive culture marked by cooperation among companies, educational institutions, trade associations, and workers, strengthening a local production cluster recognized nationwide.

The GI also recognizes the value of the knowledge accumulated by local industries in creating products focused on children's comfort, safety, and development. This intangible heritage includes modeling techniques, design, innovation, and adaptation to children's specific needs, factors that contributed to the reputation of Birigui's footwear in both domestic and international markets.

Thus, the Geographical Indication of children's footwear from Birigui symbolizes not only the origin of a product, but also the preservation of a collective history, traditional know-how, and a cultural identity built by the local community over more than six decades.



# Objectives of the Study

The main objective of this study was to conduct a diagnostic assessment of the Geographical Indication (GI) of children's footwear from Birigui through the application and expansion of the "Metrics that Matters" methodology, developed by RIPA - Reinforce Intellectual Property Association. The methodology proposes a set of indicators designed to evaluate the performance, governance, sustainability, and socioeconomic impact of Geographical Indications and their representative associations.

Within this context, the study analyzed the current structure and operational dynamics of the Birigui GI ecosystem, identifying its strengths, challenges, opportunities, and institutional needs. The diagnostic approach aims to support the development of strategic actions focused on strengthening the GI as a tool for territorial valorization, competitiveness, and sustainable regional development.



# Research Methodology & Survey Framework

The research methodology adopted in this study was structured to support the diagnostic assessment of the Geographical Indication (GI) of children's footwear from Birigui through the application of the "Metrics that Matters" framework, developed by RIPA - Reinforce Intellectual Property Association. The methodology combined quantitative and qualitative approaches to ensure a comprehensive understanding of the governance structure, productive ecosystem, socioeconomic impacts, and institutional dynamics associated with the GI.

To support data collection and validation, two different survey instruments were developed. The first questionnaire was directed to the representative association responsible for the management and coordination of the GI, focusing on governance, institutional structure, strategic planning, use of the GI seal, market positioning, collective actions, and sustainability initiatives. The second questionnaire was applied directly to manufacturers, producers, artisans, workers, and other value chain participants associated with the footwear production ecosystem. This survey focused on productive activities, employment generation, production

processes, commercialization, awareness of the GI, perceived benefits, operational challenges, and market access conditions.

The surveys were conducted in situ within the geographical area of the GI, allowing direct interaction with stakeholders and enabling a closer understanding of the local production reality. The field activities were carried out with the support and monitoring of staff members and researchers from the Instituto Federal de Educação, Ciência e Tecnologia de São Paulo (IFSP), who accompanied the application of the questionnaires throughout the data collection process.

During the field visits, the IFSP team played an important role in explaining the objectives and structure of the questionnaires to participants, ensuring proper understanding of the questions and promoting stakeholder engagement and awareness regarding the importance of the study and the Geographical Indication itself. This participatory approach also contributed to increasing the reliability and consistency of the responses collected.

In addition, the direct monitoring conducted during the interviews enabled



preliminary verification and validation of the information provided by respondents, reducing inconsistencies and strengthening the credibility of the dataset. The in-person observations, institutional interactions, and field notes obtained throughout the survey process also served as complementary qualitative inputs for the interpretation of results.

The validated data were subsequently organized and analyzed to support the construction of indicators related to governance, economic performance, social impact, market positioning, institutional capacity, and sustainability of the GI ecosystem. These indicators form the basis of the diagnostic analysis presented in this study and are intended to support future strategic planning, policy development, and action plans aimed at strengthening the competitiveness and long-term sustainability of the Birigui GI.

# Technical Characteristics & Production Process

The Geographical Indication (GI) for children's footwear from Birigui is distinguished by a combination of technical expertise, specialized production methods, and accumulated know-how developed over decades by the local footwear industry. The region is internationally recognized for its specialization in the manufacture of children's shoes, with production processes specifically adapted to the anatomical, ergonomic, and safety needs of children.

One of the main technical characteristics of Birigui's children's footwear is the emphasis on comfort, flexibility, durability, and child safety. The products are developed using lightweight materials, soft linings, anatomical insoles, flexible soles, and carefully designed fastening systems to ensure proper foot development and ease of use. The footwear also incorporates design features appropriate to different stages of childhood, considering factors such as mobility, balance, and resistance.

The production process involves a high degree of specialization and quality control. It typically begins with product design and modeling, where technical teams develop shoe structures adapted to children's foot anatomy and current market trends. After the design phase, materials such as leather, synthetic laminates, textiles, rubber, EVA, and thermoplastic components are selected according to technical performance and safety requirements.

The manufacturing stages generally include cutting, stitching, assembly, sole injection or attachment, finishing, and final inspection. Many companies in Birigui combine traditional craftsmanship with industrial technologies, including computerized cutting systems, automated sewing

equipment, and modern molding techniques. Throughout the process, strict quality standards are applied to ensure resistance, comfort, non-toxicity of materials, and compliance with national and international regulations for children's products.

Another important characteristic of the GI production system is the existence of a consolidated local production network. The region benefits from an integrated industrial cluster composed of footwear manufacturers, suppliers of components and raw materials, machinery companies, technical service providers, logistics operators, and professional training institutions. This cooperative environment facilitates innovation, rapid production adaptation, and continuous technical improvement.

The reputation of Birigui's children's footwear is therefore associated not only with the geographical origin of the products, but also with the region's specialized manufacturing culture, technical knowledge, and long-standing tradition in producing safe, comfortable, and high-quality footwear for children.



# Value Chain Analysis

The value chain of the GI for children's footwear from Birigui is characterized by a highly specialized industrial cluster that integrates suppliers, manufacturers, artisans, service providers, institutions, and commercial networks. Skilled artisans play a key role in the production process, contributing to the finishing, assembly, and quality control of footwear. Their expertise and attention to detail are essential for ensuring comfort, durability, aesthetic appeal, and the overall quality that distinguishes Birigui's children's footwear in the market.

A key strength of the Birigui children's footwear sector lies in its highly skilled workforce, whose expertise has been developed through many years of experience in the industry. The knowledge accumulated by workers, technicians, and artisans contributes directly to product quality, particularly in areas such as design, assembly, finishing, comfort, and durability. This specialized know-how represents an important intangible asset of the cluster and supports its reputation in the market.

However, the long-term sustainability of the sector depends on effective generational succession. As experienced professionals approach retirement, attracting and training younger workers becomes increasingly important to ensure the transfer of knowledge and skills. Without sufficient renewal of the workforce, the sector may face challenges in maintaining its production standards, innovation capacity, and competitiveness over time.

Their expertise and attention to detail are essential for ensuring comfort, durability, aesthetic appeal, and the overall quality that distinguishes Birigui's children's footwear in the market.

**Raw Material Suppliers:** The value chain begins with prioritization of suppliers of raw materials and components located within or near the Birigui region, facilitating logistics, reducing production lead times, and enabling close technical collaboration with manufacturers.

**Machinery and Technology Providers:** Technological innovation plays an important role in improving productivity, precision, and product consistency. Companies increasingly adopt automated and computerized systems while maintaining traditional craftsmanship in selected production stages.

**Design and Product Development:** Footwear companies invest significantly in design, modeling, and product engineering. Technical teams develop collections adapted to children's anatomical and ergonomic needs, combining comfort, safety, aesthetics, and durability. Market research, fashion trends, and consumer preferences influence product development cycles.

**Manufacturing Process:** The manufacturing stage is the core of the value chain. The region benefits from a skilled workforce with accumulated know-how in children's footwear production. Quality standards are emphasized throughout the process to ensure compliance with national and international safety requirements.

**Supporting Services and Institutions:** The cluster is supported by trade associations, technical schools, professional training centers, research institutions, logistics companies, and business support organizations. These institutions contribute to workforce qualification, technological upgrading, export promotion, and dissemination of best practices. Cooperation among actors strengthens collective competitiveness and innovation capacity.



**Consumers and Market Reputation:** The final stage of the value chain involves consumers who associate Birigui footwear with quality, comfort, safety, and specialization in children's products. The GI strengthens market recognition by linking the product's reputation to its geographical origin and to the local manufacturing culture developed over decades.

The Birigui footwear value chain demonstrates how territorial specialization, industrial cooperation, and accumulated technical expertise can generate competitive advantages and sustain a globally recognized production system for children's footwear.



# Socio-Economic Impact Assessment

The data collected show that the Geographical Indication (GI) of children's footwear from Birigui is strongly associated with the historical, social, and cultural consolidation of the productive activity within the territory.

Based on the collected data, a high level of experience within the sector can be observed among participants in the production chain, with more than 10 years of experience in children's footwear manufacturing representing the predominant reality, while approximately 32% of respondents have more than two decades of experience in the sector. This scenario demonstrates not only the stability of the local economic activity, but also the continuity of productive knowledge and practices across generations.

Another relevant aspect revealed by the research concerns the strong community dimension associated with children's footwear production in Birigui. Approximately 48% of participants stated that they learned the trade from family members or from the local community itself, demonstrating that, even within a production chain that evolved into an industrial arrangement, the activity still maintains significant links with processes of cultural and social transmission of productive knowledge. However, nearly half of respondents did not learn through family transmission — the industrial cluster has shifted to formal and institutional knowledge transfer, creating an opportunity gap in cultural narrative ownership.

The indicators also demonstrate a high degree of belonging and symbolic appreciation related to the Geographical

Indication, suggesting that the GI transcends its economic function, also acting as an instrument of social valorization, professional recognition, and strengthening of the collective self-esteem of workers involved in the production chain.

Youth and Inter-Generational Future was the lowest-scoring parameter, highlighting it as the most pressing concern for the long-term sustainability of the Birigui GI. Labour shortages were also identified as the most frequently cited challenge in the open-ended responses. Without effective strategies to support generational succession, the cluster may face a significant workforce gap in the future. Attracting young people to careers within GI-related companies is therefore a critical challenge that involves both internal factors, such as working conditions and career opportunities, and external factors, including changing aspirations and labour market dynamics. Promoting innovation, technological development, and greater diversity in job opportunities may help increase the sector's attractiveness to younger generations and support the continuity of its specialized knowledge and skills.

The results described above indicate that the Geographical Indication of children's footwear from Birigui plays a relevant role not only in the economic dynamization of the territory, but also in the preservation of productive knowledge, the strengthening of local identity, and the social valorization of the actors involved in the production chain.

However, it is also important to highlight the existence of relevant opportunities for



strengthening the Geographical Indication, including within Birigui's own territory. The recognition of the GI by the local population and by actors within the production chain demonstrates solid foundations for expanding actions related to cultural valorization, territorial promotion, and community engagement. In this context, initiatives focused on disseminating the identity of the GI have strategic potential to increase its visibility and consolidate its role as an economic and cultural heritage of the municipality.

The creation of thematic events and cultural experiences aimed at promoting the Geographical Indication represents an important instrument for territorial strengthening. In this scenario, the "Seal Hunt" event stands out as a strategic activity capable of energizing the city, stimulating public engagement, and bringing consumers closer to the history and values associated with children's footwear from Birigui.

Considering that the sector's main target audience is children, playful, educational, and interactive initiatives have strong potential to connect with children and their families, strengthening not only the image of the GI, but also the sense of belonging and cultural appreciation of the territory.

# Birigui Children's Footwear

## Impact Assessment Report

31

Producers  
surveyed

50

Survey  
questions

77.7%

Overall  
GI score

Apr 2026

Field  
survey date

### GI Performance Classification — 'Metrics That Matter' Framework

< 50%

Failing GI

50–64%

At-Risk GI

65–79%

Stable GI

80–100%

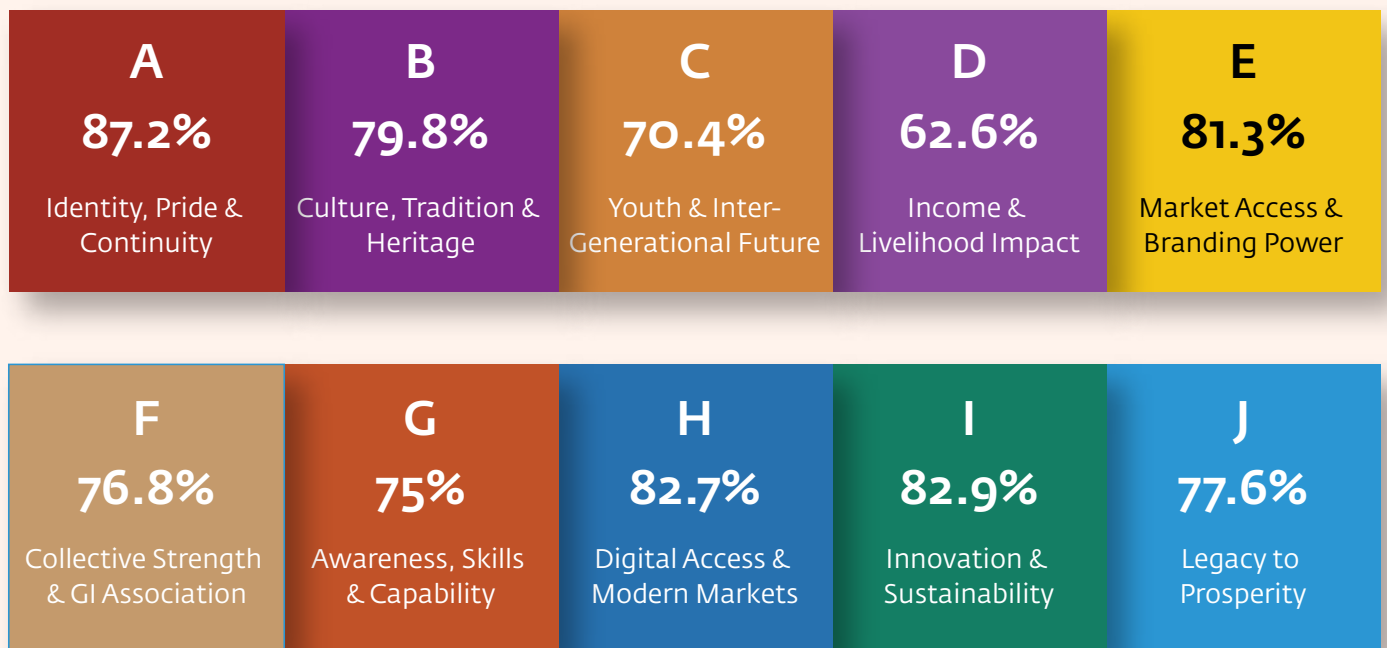
High-Impact GI

#### Birigui GI Current Status: **STABLE** (77.7% — Band 65–79%)

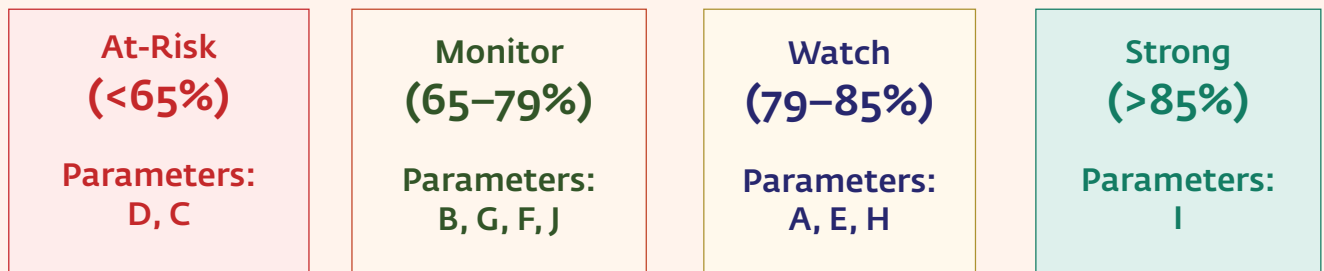
The Birigui Children's Footwear GI demonstrates solid institutional foundations, strong promotional activity, and genuine cultural pride. However, income adequacy (62.6% — At-Risk) and youth engagement (70.4% — At-Risk) are structural vulnerabilities requiring immediate and targeted intervention to prevent long-term ecosystem erosion.



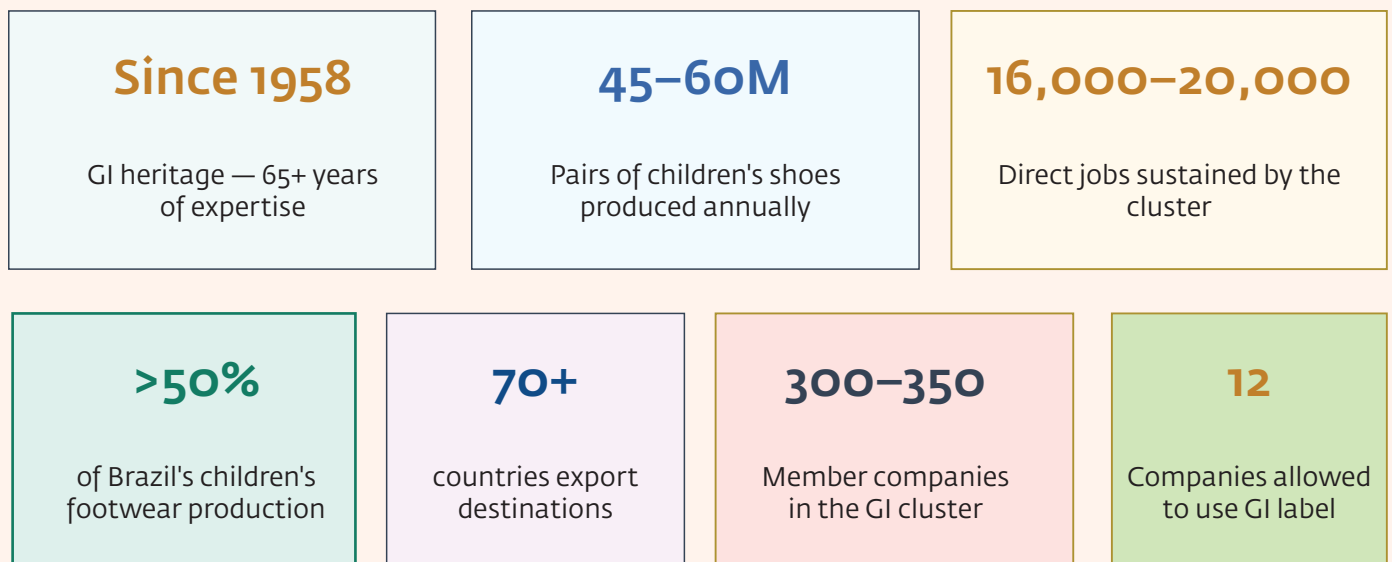
## Executive Snapshot



## Parameter Status Classification



## Key Contextual Facts — Birigui GI Cluster



## Producer Profile & Demographics

Field survey: 31 respondents across the Birigui cluster — April 2026

|                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                   |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Gender Split</b></p> <p><b>58%</b></p> <p><b>Female respondents</b><br/>42% Male</p> <p>Unlike purely artisanal crafts, Birigui's industrial cluster has a higher female participation in production roles — reflecting SINBI's workforce inclusion.</p> | <p><b>Experience Profile</b></p> <p><b>32%</b></p> <p><b>20+ years experience</b><br/>26% have 10–20 yrs</p> <p>Deep accumulated know-how — over 58% have a decade or more in the sector. This is a defining GI asset and a succession risk simultaneously.</p> | <p><b>Educational Level</b></p> <p><b>42%</b></p> <p><b>College graduates</b><br/>35% High School</p> <p>Highly educated cluster — confirming the industrial, not artisanal, nature of Birigui's GI ecosystem</p> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Age Distribution

| 20–30 yrs      | 30–40 yrs      | 40–50 yrs              | 50+ yrs        |
|----------------|----------------|------------------------|----------------|
| ~6 respondents | ~8 respondents | <b>~13 respondents</b> | ~3 respondents |

### The 40–50 year age cohort dominates (42% of respondents).

Combined with only 19% under 30, this confirms a generational pipeline problem — Birigui's experienced workforce is aging without sufficient youth replacement entering the sector. This demographic finding directly underpins the C-parameter (Youth) At-Risk score of 70.4%.

## Open-Ended Responses: What Producers Said

|                                                                                                        |                                                                                                    |                                                                                                     |
|--------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| <p><b>Biggest Challenges</b></p> <p>Labour shortage, lack of qualified workers, employee retention</p> | <p><b>One change for income</b></p> <p>Automation/AI adoption, better wages, wider recognition</p> | <p><b>Online platforms used</b></p> <p>Mercado Livre, Shopee, own website (only ~5 respondents)</p> |
|--------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|

## Ten-Parameter Deep-Dive Analysis

**A**

**87.2%**  
SCORE

### Identity, Pride & Continuity

At 87.2%, identity and pride in the Birigui children's footwear GI are genuinely strong. The cluster's 65+ year history and Brazil's 'Capital of Children's Footwear' identity resonate deeply. However, nearly half of respondents did not learn through family transmission — the industrial cluster has shifted to formal and institutional knowledge transfer, creating an opportunity gap in cultural narrative ownership

| Question                                           | Strongly | Partially | Uncertain | No/Against |
|----------------------------------------------------|----------|-----------|-----------|------------|
| Engaged with this GI craft/product for many years  | 74%      | 19%       | 3%        | -          |
| Learned this craft from family or community elders | 48%      | 23%       | 3%        | 13%        |
| Feel proud to be associated with this GI           | 74%      | 19%       | 6%        | -          |
| Being a GI producer gives identity and dignity     | 55%      | 26%       | 16%       | -          |
| Want to continue this craft for working life       | 58%      | 19%       | 16%       | 3%         |

## Field Evidence & Ground Reality

74% express strong pride, but only 55% fully affirm that the GI gives them identity and dignity. A 19-point gap revealing that institutional pride has not fully translated to individual professional identity.

48% learned through family/community (vs. 13% No), unlike purely artisanal crafts, Birigui's industrial cluster transmits knowledge through factories, technical schools, and apprenticeships. This is structurally different, not deficient.

58% intend to continue long-term, but 16% are neutral and 3% would not in an industrial setting this reflects labour market mobility rather than craft abandonment.

The pride score (74% strong) is the highest sub-score in this parameter, confirming that the GI certification has successfully elevated the reputation of Birigui's workers.

## Strategic Interventions

1. Develop a 'Born in Birigui' worker identity programme — storytelling content, certificates, and recognition events that connect factory workers to the GI's 65-year heritage.

2. Create a documented knowledge repository: oral histories, production milestones, founding family narratives, and iconic design achievements, housed at SINBI and accessible to all workers.

3. Integrate GI identity content into onboarding programmes for new workers at member companies, making heritage awareness a standard part of workplace culture.

4. Annual 'GI Artisan of the Year' recognition awards to elevate professional identity and signal the sector's commitment to valuing its workforce.

**B**  
**79.8%**  
**SCORE**

## Culture, Tradition & Heritage

Culture and Heritage scores 79.8% — the second-lowest parameter. This is an industrial cluster, not a craft village, so some divergence from artisanal cultural metrics is expected. However, the findings reveal real gaps: weak festival linkage, low community awareness of GI history, and only moderate tradition-preservation. The 'Seal Hunt' initiative and shoe-shaped public telephones signal an emerging territorial culture worth investing in.

| Question                                                    | Strongly | Partially | Uncertain | No/Against |
|-------------------------------------------------------------|----------|-----------|-----------|------------|
| This GI represents the cultural identity of the region      | 74%      | 10%       | 6%        | 6%         |
| Traditional methods/designs still followed in production    | 45%      | 35%       | 13%       | -          |
| Feel responsible for passing this craft to next generation  | 48%      | 29%       | 13%       | 6%         |
| Community knows the history and story of this GI            | 39%      | 26%       | 16%       | 13%        |
| Local festivals or traditions are linked to this GI product | 26%      | 32%       | 23%       | 10%        |

## Field Evidence & Ground Reality

The festival/tradition linkage is the weakest question across the entire survey — only 26% fully affirm it. For an industrial cluster, this is understandable but strategically important: consumer-facing cultural events can differentiate Birigui globally.

Only 39% say community members fully know the GI's history — suggesting that the '65 years of children's footwear' story is not yet widely known outside the industry itself.

Traditional methods are only moderately preserved (45% fully, 35% partly) — reflecting the reality that industrial modernization has replaced many manual techniques, though the accumulation of specialized know-how remains the GI's core value proposition.

The 'Seal Hunt' event and shoe-shaped monuments are early indicators of cultural programming — they need scaling and systematization to become a reliable cultural anchor for the GI.

## Strategic Interventions

1. Develop a permanent 'Birigui Children's Footwear Heritage Centre' — combining factory museum, archive, interactive exhibits, and educational content for school visits.

2. Scale the 'Seal Hunt' event into an annual GI Cultural Festival with consumer engagement, factory tours, artisan demonstrations, and international media coverage.

3. Commission a 'Birigui GI Heritage Book' in Portuguese and English — documenting 65+ years of history, founding families, iconic products, and technological milestones.

4. Partner with Birigui Municipal Schools for a 'Know Your GI' curriculum module — ensuring the next generation grows up knowing the significance of the city's footwear identity.

**C**  
**70.4%**  
**SCORE**

## Youth & Inter-Generational Future

Youth & Inter-Generational Future is the lowest-scoring parameter at 70.4% — and the most urgent concern for Birigui's long-term GI sustainability. Only 13% fully affirm youth interest in the craft; 39% believe GI has increased youth respect. Labour shortages are already the most cited challenge in open-ended responses. The cluster risks a workforce gap if generational succession is not structurally addressed.

| Question                                                    | Strongly | Partially | Uncertain | No/Against |
|-------------------------------------------------------------|----------|-----------|-----------|------------|
| Young people in community interested in this craft          | 13%      | 29%       | 26%       | 26%        |
| GI recognition increased respect among youth                | 16%      | 26%       | 39%       | 16%        |
| Low income discourages youth from continuing this craft     | 42%      | 35%       | 13%       | 6%         |
| Better income and markets would attract youth to this craft | 61%      | 19%       | 6%        | 6%         |
| Believe this craft has a future for the next generation     | 32%      | 23%       | 19%       | 19%        |

## Field Evidence & Ground Reality

CRITICAL: Only 13% fully affirm youth interest (26% say No). This is the most alarming single data point in the survey. Open-ended responses confirm 'lack of labour' and 'lack of qualified labour' as the top sector challenges.

39% are uncertain whether GI recognition has improved youth respect for the craft — signalling that the GI brand has not yet penetrated the consciousness of young job-seekers in Birigui and surrounding areas.

42% fully confirm that low income discourages youth (with 35% partly agreeing). At the same time, 61% believe better income and market access would attract youth — the incentive lever is clear.

Only 32% fully believe the craft has a secure future for the next generation, with 19% saying No. This is a remarkably pessimistic signal from within the cluster's own workforce.

## Strategic Interventions

1. URGENT: GI-linked youth apprenticeship programme with SENAI/SENAC and member companies — offering structured 12–24 month paid pathways into skilled footwear production roles.

2. Wage benchmark review: establish industry-wide minimum salary standards for GI-certified production roles that are competitive with alternative local employment options.

3. Secondary school engagement: 'Future of Footwear' career awareness programme in Birigui schools — with factory visits, student design competitions, and GI ambassador presentations.

4. Digital skills integration: position GI-sector roles as high-tech careers (digital cutting, 3D modelling, automated stitching) — reframing 'factory work' as a modern, skilled profession.

D

62.6%

SCORE

## Income & Livelihood Impact

Income & Livelihood Impact is the critical alert parameter at 62.6% — the lowest score in the survey and the only parameter below the 65% stability threshold. This places Birigui GI in the 'At-Risk' band for income outcomes. GI recognition has not yet translated into consistent price premiums or income improvement for a majority of producers. The data indicate structural disconnect between GI certification value and economic return.

| Question                                            | Strongly | Partially | Uncertain | No/Against |
|-----------------------------------------------------|----------|-----------|-----------|------------|
| Income improved after GI recognition                | 26%      | 13%       | 26%       | 26%        |
| Income has become more stable because of GI         | 26%      | 23%       | 23%       | 23%        |
| GI products get better prices than non-GI products  | 29%      | 10%       | 35%       | 13%        |
| GI has reduced dependence on middlemen              | 10%      | 26%       | 26%       | 23%        |
| This craft provides enough income to support family | 32%      | 16%       | 23%       | 23%        |

## Field Evidence & Ground Reality

Only 26% fully affirm income improvement after GI recognition — with 26% explicitly saying No. This is the clearest evidence that GI registration alone does not create economic returns without market infrastructure.

The price premium question (Q18) shows 35% neutral — meaning over a third of respondents cannot confirm whether GI products command better prices. Market intelligence is absent; producers do not know what their certified products could command.

Only 10% say GI has fully reduced middlemen dependence; 23% say No. The value chain continues to extract margin before it reaches producers.

32% fully affirm the craft provides adequate family income; 23% say it does not. This 'income adequacy gap' is the primary driver of both youth disengagement and potential workforce attrition.

## Strategic Interventions

**1.** Establish a GI Price Observatory: track and publish real-time market prices for Birigui GI products in domestic and export markets — giving producers pricing intelligence and negotiating leverage.

**2.** Minimum price floor mechanism: SINBI to establish and communicate recommended minimum prices for certified GI products sold through all channels — domestic retail, wholesale, and export.

**3.** Direct-to-buyer facilitation: SINBI to develop a vetted buyer database and matchmaking service — reducing producer dependence on intermediaries for both domestic and export sales.

**4.** GI Premium Communication: develop buyer-facing documentation quantifying the premium value of certified Birigui footwear — safety standards, ergonomics, quality history — to justify and defend price points.

E

81.3%

SCORE

## Market Access & Branding Power

Market Access & Branding Power scores 81.3% — a mid-strong result reflecting real promotional activity (fairs, exhibitions) and strong belief in the power of better branding. However, only 23% fully affirm the GI has opened new markets for them, with 32% uncertain. The promotional infrastructure exists; the translation from visibility to verified buyer access remains incomplete.

| Question                                               | Strongly | Partially | Uncertain | No/Against |
|--------------------------------------------------------|----------|-----------|-----------|------------|
| GI recognition helped reach new buyers or markets      | 23%      | 35%       | 32%       | 3%         |
| GI products promoted through fairs or exhibitions      | 65%      | 16%       | 10%       | 3%         |
| Buyers value GI identity when purchasing the product   | 48%      | 19%       | 19%       | 6%         |
| GI branding helps product stand apart from competitors | 52%      | 26%       | 16%       | 3%         |
| Better branding can further increase income            | 58%      | 26%       | 10%       | 3%         |

## Field Evidence & Ground Reality

65% fully affirm fairs and exhibitions are happening — this is one of the strongest scores in the survey. The promotional machine exists and is visible to the sector.

But only 23% say the GI has actually opened new markets for them. There is a gap between the association's promotional effort and individual producer benefit — a reach-distribution problem.

48% say buyers value GI identity — suggesting the consumer-side brand equity is building but not yet dominant. Consumer-side GI education is needed alongside producer-side branding.

58% believe better branding will increase income — the highest aspiration score in this parameter and an actionable signal for SINBI's marketing investment priorities.

## Strategic Interventions

**1.** International trade fair strategy: SINBI to coordinate a unified Birigui GI pavilion at MICAM, Expo Riva Schuh, and Las Vegas WSA — maximising global visibility and collective brand presence.

**2.** B2B buyer matchmaking programme: structured annual event bringing international and domestic buyers directly to Birigui — converting promotional awareness into verified commercial relationships.

**3.** Consumer-facing GI seal campaign: digital and print campaign explaining what the Birigui GI seal means — targeting parents, paediatric healthcare professionals, and retailers as the primary purchasing decision-makers.

**4.** GI Product Storytelling Kit: multilingual content package (video, brochure, social media assets) enabling every member company to communicate the GI's heritage and quality credentials.

|                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>F</b><br><br><b>76.8%</b><br><br><b>SCORE</b> | <b>Collective Strength &amp; GI Association</b><br><br>The GI Association (SINBI) scores 76.8% — a moderate-strong result that reflects genuine institutional credibility while surfacing an important gap: anti-counterfeiting effectiveness. 42% of respondents cannot affirm that SINBI effectively combats fake products — the highest uncertainty in this parameter and a systemic trust risk if left unaddressed. |
|--------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

| Question                                                  | Strongly | Partially | Uncertain | No/Against |
|-----------------------------------------------------------|----------|-----------|-----------|------------|
| GI Association (SINBI) is active and approachable         | 39%      | 32%       | 29%       | -          |
| Producers involved in Association decision-making         | 39%      | 26%       | 29%       | 3%         |
| Association helps solve producer problems                 | 32%      | 39%       | 23%       | -          |
| Association protects against fake/counterfeit GI products | 39%      | 10%       | 42%       | -          |
| Trust the Association to represent interests              | 48%      | 23%       | 26%       | 3%         |

## Field Evidence & Ground Reality

|                                                                                                                                                                                                                                      |                                                                                                                                                                                          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>The counterfeit protection question has the highest neutral/uncertain response (42%) of any question in the F-parameter. Producers are not confident that fake Birigui GI products are being actively combated in the market.</p> | <p>29% are uncertain whether SINBI is 'active and approachable' — suggesting that parts of the membership base have limited or irregular engagement with the association.</p>            |
| <p>48% fully trust SINBI to represent their interests — a reasonable base but below what is needed for strong collective action. The 26% neutral represents producers who are detached from institutional processes.</p>             | <p>39% involvement in decisions is positive for an industrial cluster association — but 29% neutral suggests information flows about decision-making opportunities need improvement.</p> |

## Strategic Interventions

|                                                                                                                                                                                                                             |                                                                                                                                                                                                                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>1.</b> Anti-counterfeiting action plan: SINBI to partner with INPI and market surveillance authorities to implement a structured programme for identifying and acting against fake Birigui GI products.</p>           | <p><b>2.</b> QR-based product authentication: develop a digital traceability system linking each certified product to a verifiable GI record — enabling consumers and retailers to authenticate at point of purchase.</p> |
| <p><b>3.</b> SINBI membership communications upgrade: regular newsletter, member assemblies, and digital reporting on SINBvi's activities — improving transparency and reducing the 'neutrality' of disengaged members.</p> | <p><b>4.</b> Grievance and support hotline: establish a direct channel for producers to seek GI-related support, report problems, or raise concerns — reducing the sense of institutional distance.</p>                   |

G

75%

SCORE

## Awareness, Skills & Capability

Awareness, Skills & Capability at 75.0% is the third-lowest parameter and reveals a significant training gap. 19% have not received GI-related training; 16% cannot confirm training improved their skills or income; and only 29% can confidently explain GI value to buyers. For an export-oriented industrial cluster, the inability of half the workforce to articulate what the GI means to buyers is a direct commercial liability.

| Question                                             | Strongly | Partially | Uncertain | No/Against |
|------------------------------------------------------|----------|-----------|-----------|------------|
| Understand what GI is and why product has GI status  | 55%      | 26%       | 16%       | -          |
| Know the rules for using the GI name and logo        | 45%      | 26%       | 10%       | 13%        |
| Received GI training or awareness activities         | 35%      | 23%       | 16%       | 19%        |
| Training helped improve skills or income             | 32%      | 16%       | 19%       | 16%        |
| Can confidently explain GI value to potential buyers | 29%      | 26%       | 23%       | 10%        |

## Field Evidence & Ground Reality

Only 29% can confidently explain GI value to buyers — despite 55% claiming to understand what GI means. Understanding the concept and being able to sell its value are entirely different capabilities.

19% have not received any GI training — in a cluster with 300+ member companies and SINBI's active role, this training gap represents a governance failure at the point of GI on-boarding.

13% do not know the rules for using the GI name and logo — a compliance risk that could expose members to legal liability and dilute the certified brand's integrity.

The gap between 'understand GI' (55%) and 'can explain to buyers' (29%) is 26 percentage points — the largest belief-to-capability gap in the survey. This must close if GI branding is to drive commercial results.

## Strategic Interventions

**1. Mandatory GI orientation:** all new employee registrations at SINBI member companies to complete a structured 4-hour GI awareness module — covering history, rules, logo usage, and buyer communication.

**2. Buyer conversation training:** practical, roleplay-based training enabling producers and sales staff to confidently explain Birigui GI value — covering quality, safety, heritage, and certified origin narratives.

**3. Annual GI Compliance Audit:** SINBI to conduct annual checks of logo usage, Technical Specification compliance, and awareness levels across member companies.

**4. GI Ambassador Programme:** identify 20–30 producer champions per year — equipping them as certified GI spokespersons for trade fairs, school visits, and media engagements.

H

82.7%

SCORE

Digital Access & Modern Markets

Digital Access is the strongest operational parameter at 82.7% — driven by high institutional digital activity (SINBI's communications) and strong belief in digital's future importance. However, 19% of producers are not selling online at all, and open-ended responses mention 'Automation/AI' as a key income improvement lever. The sector understands digital; full adoption has not yet reached all members.

| Question                                             | Strongly | Partially | Uncertain | No/Against |
|------------------------------------------------------|----------|-----------|-----------|------------|
| Sell GI products online or through digital platforms | 39%      | 13%       | 6%        | 19%        |
| Digital platforms help reach new customers           | 52%      | 10%       | 6%        | 10%        |
| GI Association uses digital tools to communicate     | 61%      | 13%       | 6%        | 10%        |
| Digital tools can help prevent fake GI products      | 48%      | 19%       | 13%       | 13%        |
| Digital access important for the future of this GI   | 77%      | 16%       | 6%        | -          |

Field Evidence & Ground Reality

77% fully affirm digital access is critical for the GI's future — the strongest single positive consensus in the entire survey. The strategic direction is clear and uncontested.

19% are not selling online at all — in an industrial cluster with international exports to 70+ countries, this represents members who are missing significant market opportunities.

61% confirm SINBI uses digital tools to communicate — one of the higher Association scores, suggesting reasonable digital infrastructure. The gap is at the member-company level.

Online platforms used include Mercado Livre, Shopee, and own websites — the survey data shows that those who are online are using real sales platforms, not just social media.

Strategic Interventions

1. E-commerce accelerator: SINBI-facilitated programme to onboard all non-digital member companies onto relevant platforms (Mercado Livre, Amazon, own website) with catalogue, photography, and listing support.

2. Digital export enablement: partnership with APEX-Brasil to connect GI producers with international B2B digital platforms (Alibaba Business, GlobalSources) for export market development.

3. QR-linked product pages: every certified Birigui GI product to carry a QR code linking to product specification, GI certificate, producer profile, and purchase information.

4. Automation & AI readiness programme: SINBI to partner with SENAI and technology providers to support member companies in adopting AI-assisted design, automated cutting, and predictive quality control.

|                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>I</b><br><b>82.7%</b><br><b>SCORE</b> | <b>Innovation &amp; Sustainability</b><br>Innovation & Sustainability at 82.9% is one of the stronger parameters, reflecting a genuine culture of product innovation and environmental awareness within the cluster. 65% strongly affirm new designs are encouraged; 65% consider eco-friendly practices important. The collaboration gap — 19% do not collaborate with external designers or institutions — represents the most addressable opportunity in this parameter. |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

| Question                                                  | Strongly | Partially | Uncertain | No/Against |
|-----------------------------------------------------------|----------|-----------|-----------|------------|
| New designs encouraged without losing tradition           | 61%      | 16%       | 16%       | ---        |
| Collaborate with designers, institutions, or experts      | 29%      | 29%       | 6%        | 19%        |
| Innovation can increase income while respecting tradition | 55%      | 26%       | 13%       | 6%         |
| Environment-friendly practices important for this craft   | 65%      | 19%       | 10%       | 3%         |
| This GI can remain sustainable in the long term           | 61%      | 19%       | 13%       | 3%         |

## Field Evidence & Ground Reality

|                                                                                                                                                              |                                                                                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 65% on both eco-practices and design encouragement — strong alignment between innovation values and environmental awareness in the cluster.                  | 29% do not currently collaborate with external designers or institutions — significant gap given the design intensity of children's footwear and the availability of SENAI, universities, and design schools near Birigui. |
| 55% fully affirm innovation can increase income while respecting tradition — an important alignment between commercial pragmatism and heritage preservation. | 61% believe the GI can remain sustainable long-term — cautiously optimistic but not overwhelmingly confident. This correlates directly with youth (70.4%) and income (62.6%) concerns.                                     |

## Strategic Interventions

|                                                                                                                                                                                                                                      |                                                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>1.</b> Innovation Hub: establish a shared design and R&D centre within Birigui — jointly funded by SINBI, member companies, and state/federal innovation programmes — for product development, material testing, and prototyping. | <b>2.</b> Designer-in-Residence: annual programme embedding industrial designers from top Brazilian design schools within the cluster for 3-month collaborative product development cycles |
| <b>3.</b> Sustainability certification pathway: support member companies in achieving ISO 14001 environmental certification — creating a differentiator for export markets that value supply chain sustainability.                   | <b>4.</b> Circular economy pilot: develop a shoe-take-back and material-recovery programme for Birigui GI products — reducing waste, creating content, and building ESG credentials.       |

J

77.6%

SCORE

## Legacy to Prosperity

Legacy to Prosperity scores 77.6% — reflecting genuine but qualified optimism. 52% would fully recommend the craft to the next generation, and 42% say GI has improved their confidence. However, 16% say GI has NOT transformed this craft into a long-term livelihood, and 29% are neutral on whether GI has improved their confidence. The gap between the legacy that exists and the prosperity it promises remains the defining challenge for Birigui's GI ecosystem.

| Question                                                | Strongly | Partially | Uncertain | No/Against |
|---------------------------------------------------------|----------|-----------|-----------|------------|
| GI improved confidence and self-respect                 | 42%      | 13%       | 29%       | 3%         |
| GI can secure a stable future for producer families     | 39%      | 32%       | 19%       | 3%         |
| GI can transform this craft into a long-term livelihood | 39%      | 26%       | 16%       | 16%        |
| Community benefits collectively from GI recognition     | 42%      | 29%       | 16%       | 6%         |
| Would recommend this craft to the next generation       | 52%      | 19%       | 26%       | —          |

## Field Evidence & Ground Reality

52% fully recommend this craft to the next generation — but 26% are neutral. This is the largest neutral concentration in any J-parameter question, reflecting genuine uncertainty about economic prospects.

16% say GI has NOT transformed the craft into a long-term livelihood — the only parameter J question with a meaningful No response. These are likely producers who have experienced GI registration without income benefit.

29% neutral on whether GI improved their confidence — in stark contrast to the Gulabi Meenakari data where identity confidence was the highest-scoring element. Industrial cluster workers assess GI through an economic lens first.

The Legacy to Prosperity vision is achievable — the institutional foundations (SINBI, INPI recognition, 65-year heritage) exist. What is required is closing the income gap that currently separates legacy from prosperity.

## Strategic Interventions

**1.** Establish a 'GI Legacy Fund': a small-levy financing mechanism (per-pair production fee) that funds collective marketing, innovation, and producer support — making every production unit a contributor to GI sustainability.

**2.** Producer success story documentation: regular publication of economic outcomes achieved by GI-certified producers — income gains, new markets opened, jobs created — to rebuild confidence through evidence

**3.** GI Ambassador network: high-performing producers to serve as mentors for newer or struggling members — creating peer-to-peer prosperity pathways within the cluster.

**4.** Long-term GI Vision Statement: SINBI to develop and publish a 10-year vision for the Birigui GI — giving all stakeholders a shared destination and a framework for collective action.

# Critical Findings

## 01. Income-GI Disconnect: The Most Critical Structural Failure

62.6% on Income & Livelihood — the only parameter below 65%. Only 26% fully affirm income improved after GI recognition; 26% explicitly say it has not. GI registration has not been accompanied by a market pricing infrastructure that translates certification into producer earnings. This is not a perception problem — it is a structural value chain failure.

*RIPA classification: At-Risk. Immediate action required on price floors, direct-to-buyer infrastructure, and GI premium communication to markets.*

## 02. Youth & Labour Crisis: A Ticking Clock

70.4% on Youth parameter — At-Risk. Only 13% fully affirm youth interest; 26% say No. Open-ended responses confirm 'lack of qualified labour' as the dominant sector challenge. The 40–50 year cohort dominates the workforce. Without structured youth induction, the cluster faces a skills gap crisis within 10–15 years.

*Priority: GI-linked apprenticeship programme, wage benchmarking, and secondary school engagement are not optional — they are existential interventions.*

## 03. Counterfeit Blind Spot: 42% Cannot Confirm Protection

42% of respondents are 'neutral/uncertain' on whether SINBI protects against counterfeit products. This is the highest single-question neutral response in the survey. In a consumer-facing product category (children's safety footwear), the inability to protect the GI seal from imitation is both a brand risk and a consumer safety issue.

*Action: QR authentication system and SINBI-INPI coordinated market surveillance programme should be treated as governance priorities, not optional enhancements.*

## 04. Buyer Communication Gap: GI Understanding Does Not Equal GI Sales Capability

5% understand what GI means but only 29% can confidently explain GI value to buyers. This 26-point gap between understanding and communication is the largest belief-to-capability divergence in the survey. For a cluster that exports to 70+ countries, this directly limits the commercial return from GI certification.

*Investment in sales-specific GI communication training is a direct economic multiplier — every producer who can articulate GI value commands a better price.*

## 05. New Market Access Uncertainty: Fairs vs. Buyers

65% confirm GI products are promoted at fairs and exhibitions — but only 23% fully affirm the GI has helped them reach new buyers. The promotional infrastructure exists and is visible. The conversion from event presence to verified commercial relationship is the missing mechanism.

*SINBI needs a post-fair buyer follow-up and matchmaking system that converts promotional visibility into documented buyer relationships.*

## 06. Training Gap: 19% Have Received No GI Training

19% of respondents — nearly one in five — have received no GI-related training. In a cluster with 300+ member companies and SINBI's active coordination role, this represents a systemic on-boarding gap. Untrained members are compliance risks and brand risks simultaneously.

*Mandatory GI orientation at point of company registration should be implemented as a non-negotiable condition of SINBI membership.*

# Challenge Framework

## ECONOMIC

Rising production costs; income-GI disconnect; no price floor mechanism; import competition from low-cost footwear.

## WORKFORCE

Labour shortage (most cited challenge); aging skilled workforce; youth disengagement; lack of qualified successors.

## MARKET

GI-to-buyer conversion gap; uncertainty around market expansion; limited export market intelligence; need for stronger GI brand narrative.

## GOVERNANCE

Counterfeit protection uncertainty; training gaps; member communication deficits; anti-counterfeiting infrastructure incomplete.

## TECHNOLOGY

19% not selling online; automation investment needed; QR traceability not yet implemented; limited use of design technology.

## CULTURAL

Low festival/tradition linkage (lowest sub-score in survey); community GI history awareness gap; 'Seal Hunt' needs scaling.

## Footloose

A step in left  
& a drift in right  
My little steps stride  
While the path is bright!

The art of a stroll  
A footloose in sight  
The heart in 'sole'  
My walks bring might!

I strive for a path  
And hold ground tight  
I strive for a sky  
Where the dreams take flight!

A step in left  
& a drift in right  
The small steps make  
Me a beauty in delight!

- Shruthi Kaushik

# Market & Commercial Analysis



The survey results indicate that the Geographical Indication (GI) for Birigui Children's Footwear is recognized as a tool for market differentiation and commercial value creation, although its impact on market expansion is not yet perceived uniformly among the different actors within the production chain.

When asked about the acquisition of new buyers and access to new markets, approximately 35% of respondents strongly believe that the GI has contributed to the expansion of commercial opportunities for Birigui products. On the other hand, around 32% of respondents expressed uncertainty regarding this relationship or considered that there is still limited evidence to directly associate the GI with the opening of new markets. This finding suggests that, although the GI has already generated noticeable commercial benefits for part of the stakeholders, its ability to create new marketing channels still presents opportunities for further consolidation.

One noteworthy aspect concerns the efforts undertaken to promote and publicize the GI, which received high levels of recognition among artisans and other survey

participants. More than 80% of respondents acknowledged the commitment of both the industries and the managing institution in promoting GI products through trade fairs, industry events, and sector-specific promotional activities. This result highlights the importance of collective marketing strategies in strengthening the visibility of Birigui children's footwear and increasing recognition of the production territory.

The territorial identity associated with the GI is also perceived as a valued attribute by consumers. More than 67% of respondents strongly believe that buyers take the GI identity into consideration when purchasing the products. This finding indicates that the reputation built throughout the history of Birigui's footwear cluster, combined with its certified geographical origin, represents a relevant factor in purchasing decisions and in building trust within the marketplace.

The ability of the collective brand associated with the GI to differentiate products from competitors was also widely recognized. Approximately 51.6% of respondents strongly agree that the GI brand helps distinguish Birigui children's footwear from

other products available on the market, while an additional 25.8% moderately agree with this statement. Taken together, these results demonstrate that the GI already plays an important role in building a distinctive identity for the sector, reinforcing attributes such as production tradition, specialization, and recognized quality.

Finally, respondents expressed a positive perception regarding the potential of brand strengthening to generate economic benefits. Approximately 58.1% strongly believe that additional branding and communication initiatives could increase their income, while 25.8% partially agree with this possibility. These figures suggest that stakeholders perceive opportunities to enhance product value through investments in marketing, brand positioning, and strategic communication of the GI.

Overall, the results demonstrate that the Geographical Indication for Birigui Children's Footwear has already established relevance as a tool for market differentiation and origin valorization. Nevertheless, the findings also indicate the need to strengthen mechanisms capable of translating this recognition into more tangible economic outcomes, particularly with regard to market expansion, attraction of new buyers, and value generation for producers and companies associated with the GI.



# GI Awareness & Effectiveness Assessment

The survey results demonstrate a generally positive perception regarding the governance structure and institutional performance of the Geographical Indication (GI) for Birigui Children's Footwear. Respondents recognize the active role played by the managing organization in protecting, promoting, and coordinating activities related to the GI, while also highlighting opportunities for improvement in enforcement and market surveillance.

More than 70% of respondents consider that the GI representative institution actively works to protect and support the Geographical Indication. This perception reflects the visibility of the organization's efforts in coordinating promotional activities, engaging stakeholders, and maintaining the governance mechanisms necessary for the GI's operation. Furthermore, the participation of artisans and producers in strategic decision-making processes is positively evaluated, with more than 63% of respondents recognizing that stakeholders have opportunities to contribute to discussions and decisions concerning the future development of the GI.

The representative role of the managing institution is further reinforced by the level of trust expressed by its members. Approximately 50% of respondents strongly believe that the association effectively advocates for and protects the interests of the GI, while an additional 22.6% moderately support this view. These findings suggest that the institution enjoys a significant degree of legitimacy among its members and is perceived as an important actor in safeguarding the collective interests associated with the geographical indication.

Despite these positive perceptions, the survey identified an important area requiring attention regarding the



enforcement of the GI against counterfeit or unauthorized products. Approximately 41.9% of respondents believe that there is little or no evidence that the association effectively combats counterfeit products in the marketplace. However, the effectiveness of anti-counterfeiting measures often depends on factors that extend beyond the direct control of the managing institution.

Several elements may influence stakeholder perceptions in this area, including the existence and effectiveness of traceability systems, the availability of monitoring tools and digital platforms for identifying counterfeit products, and the responsiveness of public authorities responsible for intellectual property enforcement and market supervision. Consequently, the perception of limited action against counterfeit products may reflect broader structural challenges rather than a lack of commitment by the association itself.

# Institutional & Policy Ecosystem

The institutional ecosystem surrounding the Birigui Children's Footwear GI demonstrates a relatively strong level of organizational support, benefiting from the presence of an established industrial cluster, an active managing association, and partnerships with industry organizations and support institutions. Respondents generally recognize the efforts made to promote the GI and engage stakeholders in governance processes. Nevertheless, opportunities remain to strengthen public policy support, market surveillance mechanisms, and anti-counterfeiting measures. Enhanced coordination among public authorities, industry representatives, and innovation-support organizations could further improve the effectiveness of the GI as a tool for regional development, market differentiation, and value creation.



# Key Challenges & Constraints

The institutional ecosystem surrounding the Birigui Children's Footwear GI demonstrates a relatively strong level of organizational support, benefiting from the presence of an established industrial cluster, an active managing association, and partnerships with industry organizations and support institutions. Respondents generally recognize the efforts made to promote the GI and engage stakeholders in governance processes. Nevertheless, opportunities remain to strengthen public policy support, market surveillance mechanisms, and anti-counterfeiting measures. Enhanced coordination among public authorities, industry representatives, and innovation-support organizations could further improve the effectiveness of the GI as a tool for regional development, market differentiation, and value creation.

An important area for improvement identified by the survey relates to the dissemination of knowledge and awareness about the Geographical Indication among the professionals involved in the children's footwear production chain. While more than 54% of respondents reported that they understand the concept of a GI and are familiar with the basic requirements for participation, a significant proportion (approximately 35%) indicated that they have limited evidence regarding the availability of GI-related training activities or were unable to identify such initiatives at the time of the interview. This finding suggests that, although awareness of the GI exists, there may be opportunities to strengthen capacity-building efforts and improve the communication of information related to the objectives, benefits, and operational requirements of the geographical indication.

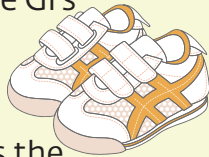
This challenge becomes particularly relevant when considering the role that producers, artisans, employees, and company representatives play as ambassadors of the GI in their interactions with buyers and other market actors. The survey revealed that only about 50% of respondents felt confident explaining the value and significance of the GI to potential customers. Limited familiarity with the broader impacts of the GI, as well as with key elements of the Technical Specifications Manual—such as the conditions for using the geographical name, the collective logo, and compliance requirements—may reduce stakeholders' ability to communicate the unique attributes associated with the indication. Expanding training programs and awareness initiatives could therefore contribute not only to stronger compliance and governance, but also to greater market recognition, stakeholder engagement, and collective defense of the GI's reputation.



# Opportunity Mapping & Growth Potential



The Geographical Indication (GI) for Birigui Children's Footwear presents a strong set of territorial assets that demonstrate significant potential for growth and expansion of its economic, social, and institutional benefits. The analysis of local factors reveals strategic opportunities capable of further strengthening the GI's positioning in both national and international markets.



One of the main drivers of growth is the well-established recognition of the territory. Birigui is widely known as the "Brazilian Capital of Children's Footwear" and the largest children's footwear production hub in Latin America, a reputation built over decades and one of the key foundations for the GI recognition granted by the Brazilian National Institute of Industrial Property (INPI). This notoriety represents an important competitive advantage for the region, especially in a context where consumers increasingly value products associated with origin, quality, and social and environmental responsibility. In addition, local companies have adopted sustainability-oriented practices, including the selection of suppliers that meet environmental criteria, proper waste management, material reuse initiatives, and a strong commitment to preventing child labor. These characteristics reinforce the territory's image among consumers who are increasingly concerned about the social and environmental impacts of the products they purchase.

Another relevant factor is the historical accumulation of knowledge and specialized know-how. Since the 1950s, Birigui has developed specific technical expertise in the production of children's footwear, encompassing areas such as pattern making, children's ergonomics, design, material selection, and manufacturing processes tailored to the needs of young consumers. This intangible heritage constitutes one of the GI's most valuable competitive assets. Furthermore, local companies have demonstrated a strong

capacity for innovation, supported by partnerships with educational institutions, research centers, industry associations, and technological development programs. This collaborative environment creates favorable conditions for the development of new products, the incorporation of emerging technologies, and the generation of higher value-added products, thereby enhancing the territory's competitiveness in an evolving marketplace.

A structured and representative governance system also stands out as an important opportunity for the GI's continued growth. The Birigui Footwear and Apparel Industry Union (SINBI) has played a fundamental role in consolidating and promoting the geographical indication, contributing to its growing recognition at the national level and strengthening the territorial identity associated with the GI. Moreover, the coordinated action among public institutions, educational organizations, companies, and other local stakeholders creates a favorable environment for the development of collective strategies, investment attraction, commercial promotion, and projects aimed at enhancing the value of geographical origin. This collaborative governance structure represents an important asset for the long-term sustainability and expansion of the GI.



Strengthening the local value chain constitutes another significant opportunity identified in the territory. The benefits generated by the GI extend beyond footwear manufacturers, reaching component suppliers, designers, service providers, logistics companies, retailers, and other actors that form part of the local productive ecosystem. This capacity to generate multiplier effects broadens the economic impact of the GI and contributes to creating a more dynamic regional development environment. Promotional and awareness-raising initiatives, such as the "Hunt for the Seal" campaign, as well as participation in trade fairs, exhibitions, and



promotional events, have increased the visibility of the GI and strengthened its connection with consumers and markets. These actions reinforce the territorial identity, stimulate business tourism, and contribute to positioning Birigui as a national and international reference in children's footwear.



An additional opportunity lies in the integration of the GI with other sectors of the local economy, particularly hospitality, tourism, recreation, and cultural services. While Birigui is already recognized as a destination for business tourism due to its footwear industry, there is potential to expand its appeal through the development of complementary attractions, experiences, and themed activities linked to the region's identity and production heritage. The creation of visitor routes, factory tours, educational experiences, cultural events, and partnerships with hotels, restaurants, and leisure providers could diversify the local tourism offer, increasing visitor length of stay and generating new sources of income for the territory. This approach would allow tourism to evolve beyond a predominantly business-oriented activity and become a new avenue for regional development and value creation associated with the Geographical Indication

Overall, the combination of territorial, institutional, and productive assets identified demonstrates that the Birigui GI possesses favorable conditions to expand its economic and social relevance in the coming years. Continued investments in governance, innovation, sustainability, and territorial promotion strategies can significantly contribute to the expansion of the GI's benefits, consolidating it as an effective instrument for regional development, the preservation of local know-how, and the generation of opportunities throughout the value chain.



# Innovation & Intervention Framework

To strengthen the long-term competitiveness, sustainability, and socioeconomic impact of the Birigui Children's Footwear Geographical Indication (GI), this study proposes an Innovation & Intervention Framework structured around five strategic pillars. These interventions seek to transform the GI from a protection-oriented instrument into a dynamic platform for value creation, innovation, territorial development, and international positioning.

Develop a continuous **educational program aimed at producers, workers, retailers, consumers, and local institutions to strengthen understanding of the GI's purpose**, benefits, and requirements. Training initiatives should focus on empowering stakeholders to act as ambassadors of the GI, improving knowledge of the Technical Specifications Manual, proper use of the seal, and communication of the unique attributes associated with Birigui's footwear tradition.

**Implement an integrated branding strategy that enhances the visibility and reputation of the GI in domestic and international markets.** Actions should include digital marketing campaigns, storytelling based on the territory's heritage, expansion of social media engagement, participation in international trade fairs, and the development of multilingual communication materials emphasizing quality, safety, sustainability, and certified origin.

**Strengthen collaboration among companies, universities, research institutions, and technology centers to foster innovation in products, processes, and materials.** Priority areas include sustainable materials, circular economy practices, eco-design, digital manufacturing technologies, traceability systems, and product development focused on children's well-being and safety. Innovation should become a key differentiator associated with the GI.

**Develop mechanisms to strengthen consumer trust and protect the value of the GI through improved traceability and anti-counterfeiting measures.**

Interventions may include digital authentication tools, QR-code systems linked to product origin information, market monitoring initiatives, and enhanced coordination with public authorities responsible for intellectual property enforcement and consumer protection.

**Promote the integration of the GI with tourism, hospitality, education, culture, and recreation sectors to diversify value creation opportunities.** Initiatives may include factory visits, footwear heritage routes, educational programs for children, interactive experiences, cultural festivals, expansion of the "Seal Hunt" initiative, and partnerships with hotels, restaurants, and tourism operators. These actions can transform Birigui from a destination primarily associated with business tourism into a broader territorial experience linked to innovation, culture, and industrial heritage.

Together, these five intervention areas provide a strategic framework capable of enhancing the competitiveness, visibility, resilience, and socioeconomic contribution of the Birigui Children's Footwear GI, ensuring its evolution from a recognized geographical indication into a global reference in territorial value creation and sustainable industrial development.



# Strategic Roadmap

The strategic roadmap for the Birigui Children's Footwear Geographical Indication (GI) proposes a phased approach aimed at strengthening the territory's competitiveness, increasing the value generated by the GI, enhancing market recognition, and fostering sustainable regional development. The roadmap builds upon the strengths identified in this study, including Birigui's internationally recognized reputation, accumulated know-how, structured governance system, innovation capacity, and integrated value chain.

## Short-Term (1–2 Years)

The immediate priority should focus on strengthening awareness, stakeholder engagement, and the effective use of the GI as a market differentiation tool. Key actions include:

- Expanding awareness campaigns about the meaning, benefits, and requirements of the GI among companies, workers, retailers, consumers, and local institutions.
- Developing training programs focused on GI governance, compliance with the Technical Specifications Manual, branding, and market communication.
- Strengthening collective promotion through trade fairs, digital campaigns, industry events, and initiatives such as the "Seal Hunt" to increase public recognition of the GI.
- Creating communication materials and storytelling strategies highlighting Birigui's heritage, quality standards, sustainability practices, and specialized know-how.
- Encouraging greater adoption and visibility of the GI seal across products, packaging, points of sale, and digital platforms.

## Medium-Term (3–5 Years)

The medium-term strategy should focus on innovation, market expansion, value creation, and ecosystem strengthening. Priority actions include:

- Developing a consolidated international brand identity positioning Birigui as a global reference in children's footwear quality, safety, comfort, and innovation.
- Expanding participation in international trade fairs, export promotion programs, and strategic partnerships with distributors and retailers in priority markets.
- Establishing collaborative innovation programs involving companies, universities, research institutions, and technology centers to foster new products, sustainable materials, and digital manufacturing solutions.
- Implementing traceability and product authentication systems, including digital technologies such as QR codes and product origin verification tools.
- Strengthening sustainability initiatives throughout the value chain, including circular economy practices, waste reduction, responsible sourcing, and environmental certification programs.
- Increasing integration among manufacturers, suppliers, designers, logistics providers, and supporting institutions to reinforce cluster competitiveness and collective efficiency.



## Long-Term (5–10 Years)

The long-term vision is to position the Birigui GI as an internationally recognized benchmark for specialized children's footwear production, territorial innovation, and sustainable industrial development. Strategic priorities include:

- Transforming the GI into a globally recognized symbol of quality, safety, innovation, sustainability, and certified origin in the children's footwear sector.
- Integrating the footwear ecosystem with tourism, hospitality, culture, education, and recreation sectors through factory tours, thematic routes, interactive experiences, museums, educational programs, and territorial branding initiatives.
- Establishing Birigui as a reference center for research, innovation, and technological development in children's footwear and child-oriented product design.
- Developing a robust international market ecosystem supported by traceability systems, sustainability credentials, quality certifications, and strategic global partnerships.
- Strengthening the GI as a catalyst for regional development, generating opportunities not only for manufacturers but also for suppliers, service providers, creative industries, tourism operators, and local communities.
- Consolidating a self-sustaining governance model capable of continuously promoting innovation, protecting the reputation of the GI, attracting investments, and ensuring the preservation of Birigui's collective know-how for future generations.

By following this roadmap, the Birigui Children's Footwear GI can evolve from a recognized industrial cluster into a global model of territorial competitiveness, innovation, sustainability, and value creation based on geographical origin.



# Conclusion: Legacy to Prosperity Framework

The Geographical Indication (GI) for Birigui Children's Footwear represents much more than a certification of origin; it reflects a legacy built over more than six decades of specialization, entrepreneurship, technical knowledge, and collective effort. Although Birigui's economy has diversified over time through the growth of commerce, services, and other industrial activities, children's footwear remains one of the municipality's most important economic pillars and continues to sustain its national reputation as Brazil's leading reference in this sector. The GI preserves and reinforces this identity, connecting the territory's history with its current productive strength.

The study demonstrates that Birigui possesses significant assets to support future growth. The combination of accumulated know-how, a highly integrated value chain, strong governance, and a culture of innovation creates favorable conditions for expanding the value generated by the GI. Strategic partnerships with universities, research institutes, and innovation centers can further strengthen competitiveness, stimulate the development of new products and technologies, and increase the recognition and credibility associated with the GI seal in both domestic and international markets.

At the same time, opportunities exist to broaden the impact of the GI beyond manufacturing activities. The integration of the footwear sector with tourism, hospitality, recreation, education, and cultural initiatives can generate new sources of income and attract visitors interested in experiencing Birigui's industrial heritage and territorial identity. Such initiatives have the potential to transform the municipality from a destination primarily associated with business activities into a more diversified center of economic and cultural experiences.

Finally, the future success of the GI will depend on its ability to preserve its legacy while embracing new opportunities. Continued recognition of the expertise of



workers, technicians, designers, and artisans, combined with the strong institutional leadership demonstrated by SINBI and its partners, provides a solid foundation for sustainable growth. By combining tradition, innovation, territorial promotion, and collective governance, the Birigui Children's Footwear GI is well positioned to strengthen its role as a national and international reference, generating long-term prosperity for the territory and its people.

# Acknowledgement

We would like to express their deepest gratitude to the Geographical Indication (GI) of Birigui Children's Footwear and to SINBI (Birigui Footwear and Apparel Industry Union) for their continuous support and collaboration. Once again, SINBI has played a fundamental role in enabling actions aimed at strengthening Geographical Indications and has proven to be an invaluable partner to the Federal Institute of São Paulo (IFSP). Their commitment, openness, and dedication to the development of the territory and its GI have been essential to the success of this initiative.

We extend our special thanks to the workers, technicians, and professionals from the footwear industries who welcomed us with generosity, enthusiasm, and trust. Throughout our visits, they shared their knowledge, experiences, and daily realities with remarkable pride and dedication. The opportunity to learn directly from those who make Birigui a reference in children's footwear production was truly inspiring. The lessons we learned from these interactions will remain with us for years to come. Thank you for believing in IFSP and for once again contributing to our mission of promoting innovation, knowledge, and territorial development.

We are also sincerely grateful to the Reinforce Intellectual Property Association (RIPA), especially to Lalit Ambastha, Medha Kaushik, and Shruthi Kaushik, for their unwavering support, guidance, attention, and patience throughout this journey. Your contributions have left a lasting mark on our technical and professional development. More importantly, you have demonstrated how far we can go when institutions and individuals work together with a shared vision, mutual respect, and a commitment to creating meaningful impact.

We gratefully acknowledge the Secretariat for Professional and Technological Education (SETEC), Ministry of Education of Brazil for its support of this project and for its continued commitment to innovation, research, and regional development. Through its support of initiatives involving Geographical Indications, the Ministry has contributed to strengthening local communities, promoting knowledge transfer, and generating positive social and economic impacts.

We would also like to thank oriGIn for fostering a collaborative environment that encourages strategic partnerships dedicated to the development and strengthening of Geographical Indications. By creating opportunities for dialogue, knowledge exchange, and collective reflection, oriGIn has helped build bridges among institutions and professionals committed to innovation, territorial valorization, and socio-economic development.

Finally, we extend our sincere appreciation to all individuals and organizations who directly or indirectly contributed to this endeavor. We hope that the findings and reflections presented in this report will contribute meaningfully to the strengthening of the Birigui Children's Footwear Geographical Indication, the preservation of its unique know-how and territorial identity, and the promotion of sustainable economic and social development for all those who are part of this remarkable ecosystem.



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The Instituto Federal de São Paulo (IFSP) is one of Brazil's leading public institutions for education, research, innovation, and technological development. With multiple campuses across the State of São Paulo, IFSP promotes scientific research, professional education, applied innovation, and international collaboration. Through its commitment to knowledge exchange and sustainable development, IFSP contributes to strengthening global partnerships that support cultural heritage, innovation, and community-based development initiatives.

### About RIPA

RIPA is a not-for-profit organization based in New Delhi, India, dedicated to promoting and facilitating indigenous Intellectual Property (IP) at national and international levels. The organization works to strengthen innovation, entrepreneurship, Geographical Indications (GIs), traditional knowledge, and technology commercialization through capacity building, research, surveys, training, and ecosystem development initiatives. RIPA actively supports innovators, artisans, researchers, startups, and rural communities in transforming ideas and heritage assets into sustainable economic opportunities.

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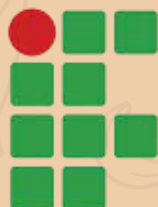
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