

WORLD

FOOTWEAR

2020

YEARBOOK

**SAMPLE
REPORT**

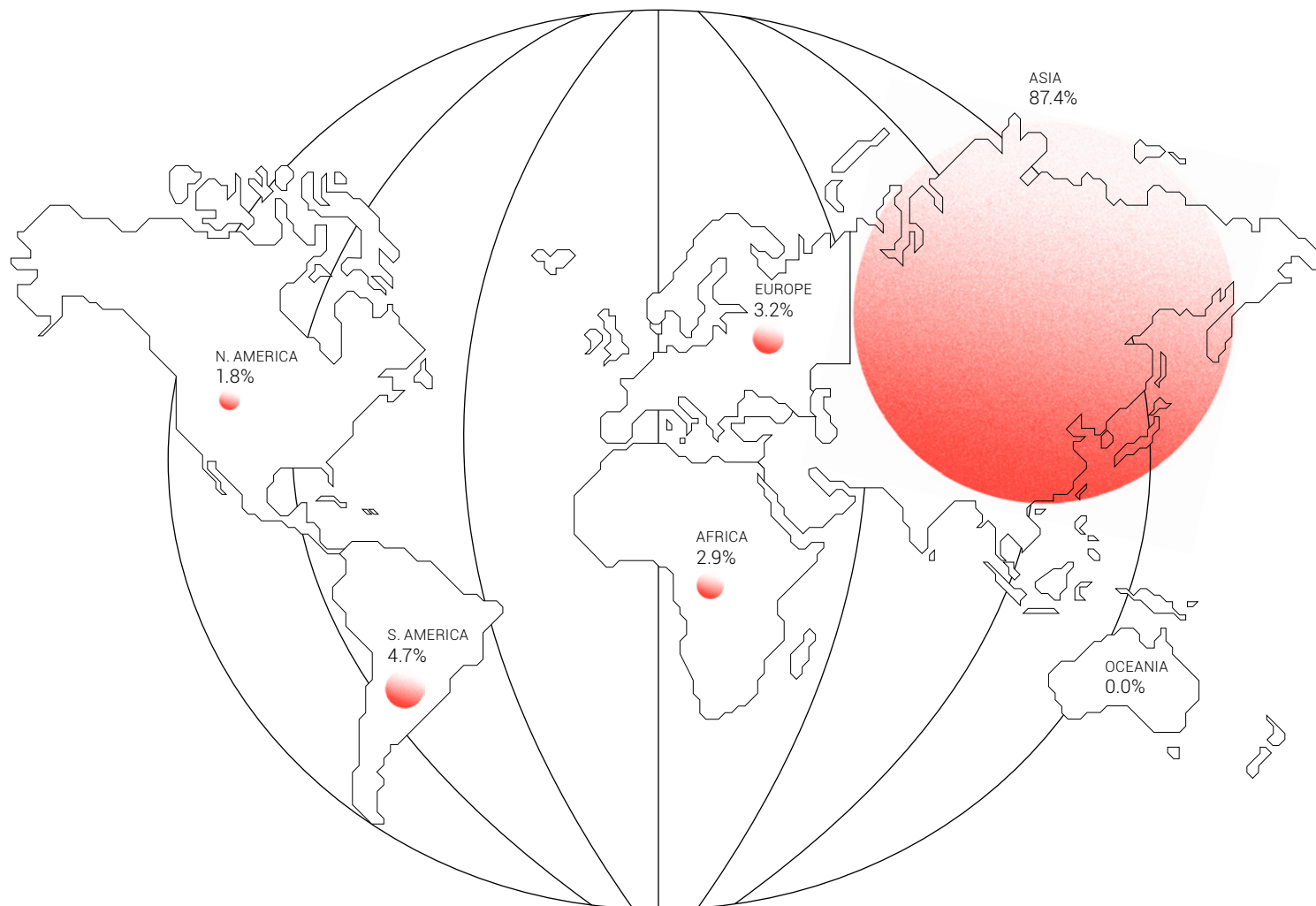
Intelligence to drive your business



WORLD FOOTWEAR

by Portuguese Shoes

PRODUCTION



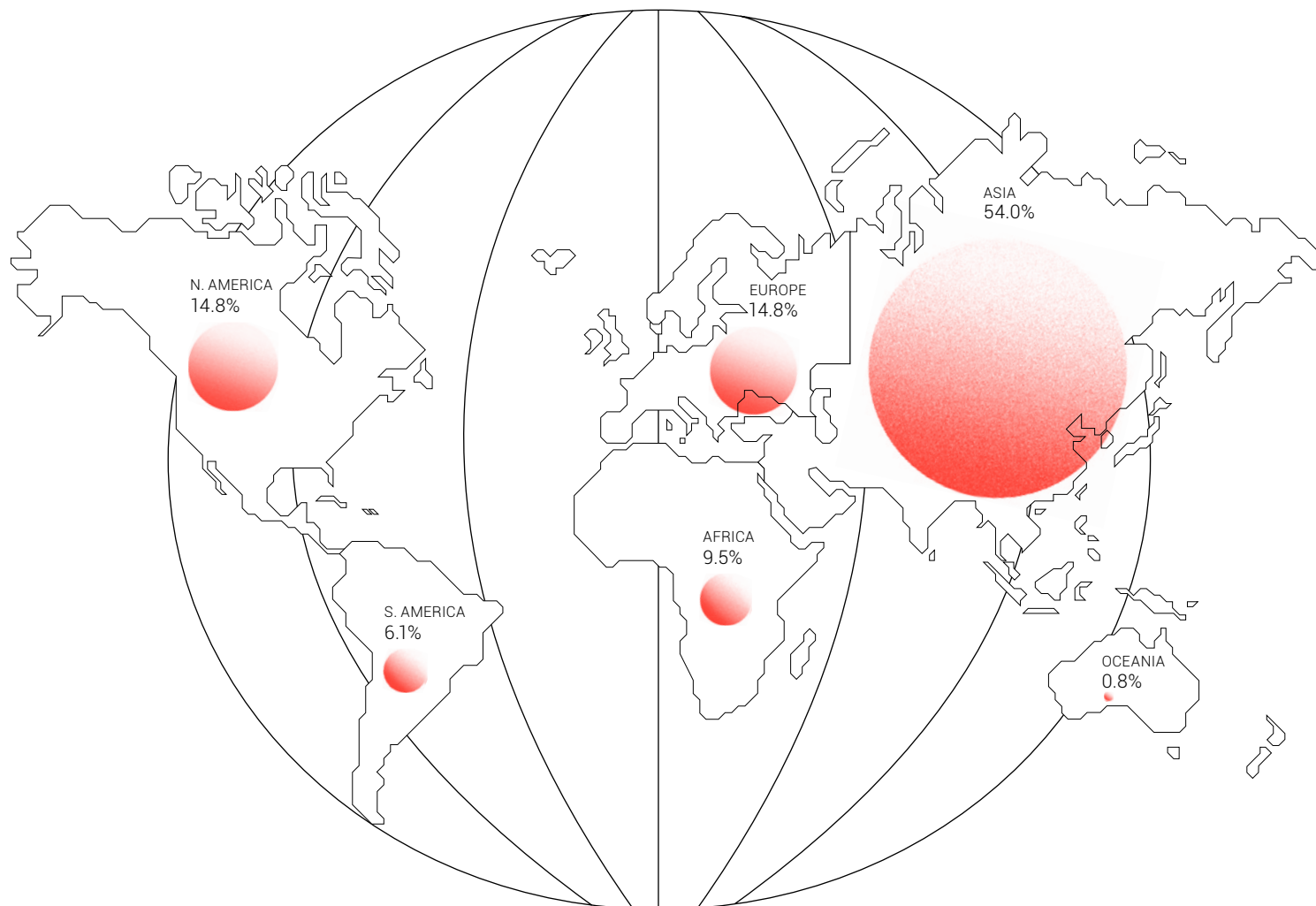
● Map 1 – Distribution of Footwear Production by Continent (Quantity) 2019

Footwear production worldwide has increased by 21.2% since 2010 at an average yearly growth rate of 2.2%. In 2019 the industry slowed down, growing only by 0.6% over the previous year, but this was enough to establish a new production record of 24.3 billion pairs. The footwear industry is strongly concentrated in Asia where almost

9 out of every 10 pairs of shoes are manufactured. Asia slightly reinforced its dominance in the international scene over the last decade with its share of the world production increasing by some 2 percentage points, mostly at the expense of South America. Africa, Europe and North America maintain stable shares of 2% to 3% of the world total, with some 0.03% of the production taking place in Oceania.

24.3 billion pairs of shoes produced in 2019

CONSUMPTION



● Map 2 – Distribution of Footwear Consumption by Continent (Quantity) 2019

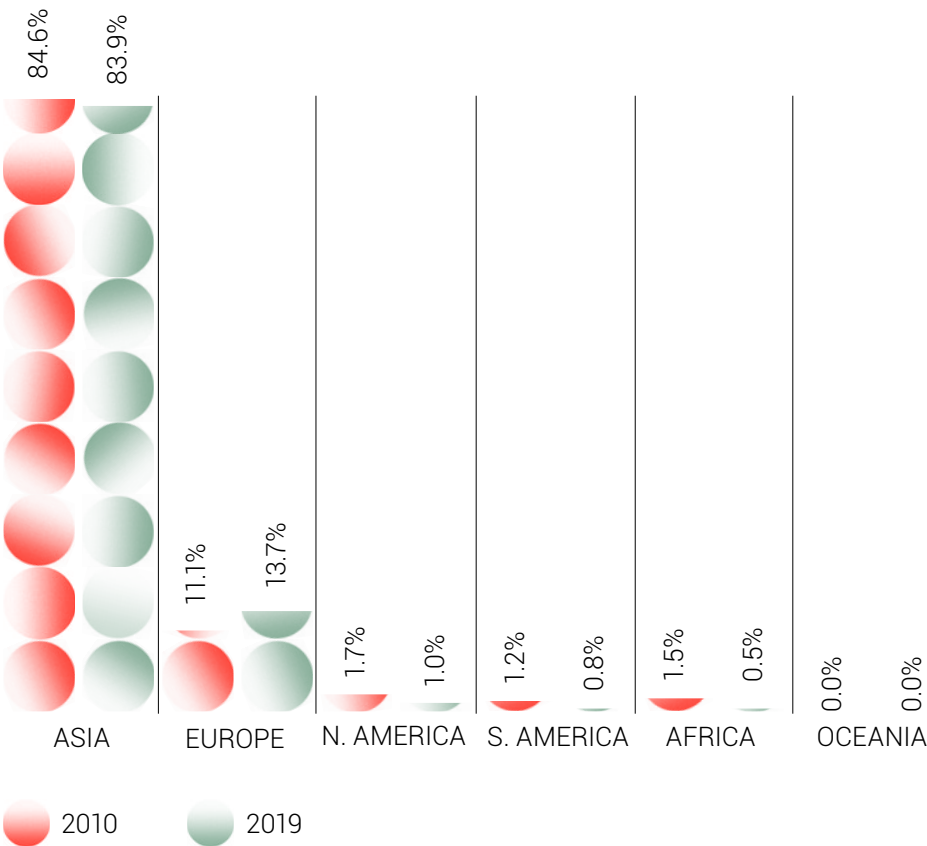
In respect of continents, footwear consumption is more evenly distributed than production: Asia's consumption accounts for more than half of all shoes in the world, but Europe and North America represent 15% each, Africa and South America 6% to 9% and Oceania 1%. Over the last decade Asia's demographic and economic dynamism has been responsible for a rise of 9 percentage points in its share of world consumption, with Africa's share also increasing significantly.

Nonetheless, there are still important geographic differences in consumption patterns: per capita footwear consumption varies between 1.6 pairs in Africa and 5.6 pairs in North America. With 4.4 pairs per person, Europe and Oceania approach North American patterns whereas Asia, with 2.6, is closer to Africa's. Therefore, it seems that it is mostly in the latter continents that footwear consumption has more room to grow.

EXPORTS

Some 15 billion pairs, or 62% of all footwear produced, were exported in 2019. Unsurprisingly, Asia is the origin of most of these exports with a world share (83.9%) that resembles that which it has in footwear production. However, its export share has decreased slightly over the last decade, as has also happened with every continent but Europe: Europe increased its share by 2.6 percentage points between 2010 and 2019.

China share of world footwear exports has fallen 7 percentage points since 2010



● Chart 3 – Distribution of Footwear Exports by Continent of Origin (Quantity) 2010-2019

China was the source for almost two out of every three pairs of shoes exported in 2019. However, its market share has been steadily declining over the last decade: since 2010 China has now lost 7 percentage points (p.p.) whereas Hong Kong has lost a further 2.4 p.p., falling from 3rd to 15th position among footwear exporters. Moving in the opposite direction, Vietnam has almost doubled its market share over the same period. India and Turkey have also shown remarkable performances throughout the decade, climbing respectively from 22nd and 16th to 5th and 6th positions. Above them, Germany is now Europe's largest exporter of footwear, having surpassed Italy and Belgium.

| RANK | COUNTRY | PAIRS (MILLIONS) | WORLD SHARE |
|------|-------------|------------------|-------------|
| 1 | CHINA | 9 542 | 63.6% |
| 2 | VIETNAM | 1 419 | 9.5% |
| 3 | INDONESIA | 427 | 2.8% |
| 4 | GERMANY | 350 | 2.3% |
| 5 | INDIA | 286 | 1.9% |
| 6 | TURKEY | 275 | 1.8% |
| 7 | BELGIUM | 269 | 1.8% |
| 8 | ITALY | 201 | 1.3% |
| 9 | NETHERLANDS | 183 | 1.2% |
| 10 | CAMBODIA | 165 | 1.1% |

● Table 3 – Top 10 Footwear Exporters (Quantity) 2019

COUNTRY PROFILES

| COUNTRY | | CONTINENT | COUNTRY | | CONTINENT |
|---------|--------------------|---------------|---------|------------------|---------------|
| AL | Albania | Europe | KZ | Kazakhstan | Asia |
| DZ | Algeria | Africa | KE | Kenya | Africa |
| AO | Angola | Africa | KR | Korea, Rep. | Asia |
| AR | Argentina | South America | LV | Latvia | Europe |
| AU | Australia | Oceania | LB | Lebanon | Asia |
| AT | Austria | Europe | LT | Lithuania | Europe |
| BD | Bangladesh | Asia | LU | Luxembourg | Europe |
| BY | Belarus | Europe | MY | Malaysia | Asia |
| BE | Belgium | Europe | MX | Mexico | North America |
| BA | Bosnia Herzegovina | Europe | MA | Morocco | Africa |
| BR | Brazil | South America | NL | Netherlands | Europe |
| BG | Bulgaria | Europe | NZ | New Zealand | Oceania |
| KH | Cambodia | Asia | NG | Nigeria | Africa |
| CA | Canada | North America | NO | Norway | Europe |
| CL | Chile | South America | PK | Pakistan | Asia |
| CN | China | Asia | PA | Panama | North America |
| CO | Colombia | South America | PY | Paraguay | South America |
| CR | Costa Rica | North America | PE | Peru | South America |
| HR | Croatia | Europe | PH | Philippines | Asia |
| CY | Cyprus | Asia | PL | Poland | Europe |
| CZ | Czechia | Europe | PT | Portugal | Europe |
| DK | Denmark | Europe | RO | Romania | Europe |
| DO | Dominican Rep. | North America | RU | Russian Fed. | Europe |
| EC | Ecuador | South America | SA | Saudi Arabia | Asia |
| EG | Egypt | Africa | RS | Serbia | Europe |
| SV | El Salvador | North America | SG | Singapore | Asia |
| EE | Estonia | Europe | SK | Slovakia | Europe |
| ET | Ethiopia | Africa | SI | Slovenia | Europe |
| FI | Finland | Europe | ZA | South Africa | Africa |
| FR | France | Europe | ES | Spain | Europe |
| DE | Germany | Europe | SE | Sweden | Europe |
| GR | Greece | Europe | CH | Switzerland | Europe |
| GT | Guatemala | North America | TH | Thailand | Asia |
| HK | Hong Kong | Asia | TN | Tunisia | Africa |
| HU | Hungary | Europe | TR | Turkey | Asia |
| IN | India | Asia | UG | Uganda | Africa |
| ID | Indonesia | Asia | UA | Ukraine | Europe |
| IR | Iran | Asia | AE | U. Arab Emirates | Asia |
| IE | Ireland | Europe | GB | U. Kingdom | Europe |
| IL | Israel | Asia | US | United States | North America |
| IT | Italy | Europe | VE | Venezuela | South America |
| JP | Japan | Asia | VN | Vietnam | Asia |

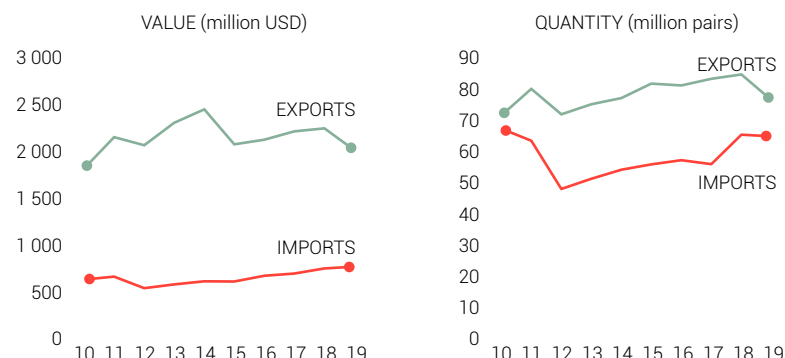


PORTUGAL

| | | | |
|-------------------------|------------|--------------------|-----------------|
| CAPITAL | Lisbon | LANGUAGE | Portuguese |
| AREA (Km ²) | 92 226 | CURRENCY | Euro |
| POPULATION | 10 million | | |
| GDP PER CAPITA | 23 145 USD | GDP 2019 | 347 billion USD |
| Δ GDP 2019 | 2.2% | Δ GDP Last 5 Years | 22.2% |

FOOTWEAR INDUSTRY

| | VALUE | | QUANTITY | | PRICE |
|-------------|-------------|------------|---------------|------------|---------|
| | Million USD | World Rank | Million Pairs | World Rank | USD |
| EXPORTS | 2 002 | 15 | 76 | 19 | \$26.26 |
| IMPORTS | 766 | 29 | 65 | 46 | \$11.82 |
| PRODUCTION | | | 76 | 20 | |
| CONSUMPTION | | | 65 | 53 | |

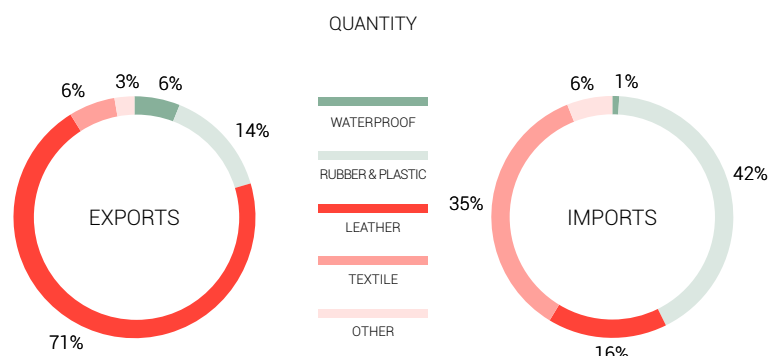


MAIN TRADING PARTNERS

| EXPORT MARKETS | Million USD | Value Share | Million Pairs | Quantity Share | LAST 5 YEARS VARIATION | Million USD |
|----------------|-------------|-------------|---------------|----------------|------------------------|-------------|
| France | 436 | 22% | 14.4 | 19% | - U. Kingdom | -27% -47 |
| Germany | 359 | 18% | 12.7 | 17% | - Netherlands | -18% -59 |
| Netherlands | 278 | 14% | 10.1 | 13% | - Spain | -28% -71 |
| Spain | 178 | 9% | 14.5 | 19% | - Germany | -20% -90 |
| U. Kingdom | 128 | 6% | 4.6 | 6% | - France | -23% -131 |

| IMPORT MARKETS | Million USD | Value Share | Million Pairs | Quantity Share | LAST 5 YEARS VARIATION | Million USD |
|----------------|-------------|-------------|---------------|----------------|------------------------|-------------|
| Spain | 276 | 36% | 22.6 | 35% | + Belgium | 54% 34 |
| Belgium | 97 | 13% | 3.5 | 5% | + Germany | 111% 30 |
| China | 91 | 12% | 21.9 | 34% | + China | 30% 21 |
| France | 64 | 8% | 4.2 | 7% | + France | 41% 19 |
| Germany | 58 | 8% | 3.6 | 5% | + U. Kingdom | 213% 18 |

TYPES OF FOOTWEAR TRADED



RECENT DEVELOPMENTS

Portugal is the 10th exporter of leather footwear worldwide, ranked among the world's leading exporters of fashion footwear and claiming to have 'The Sexiest Industry in Europe'. After three consecutive years of export growth in volume and value, Portuguese exports fell in 2019 but still exceeded 76 million pairs. France and Germany are the main markets for Portuguese footwear. Spain is Portugal's main supplier.

MAIN PLAYERS

| | TURNOVER (million USD) | EMPLOYEES |
|---|------------------------|-----------|
| ECCO'Let (Portugal) - Fábrica de Sapatos, Lda | 125.3 | 1 172 |
| Gabor Portugal - Indústria de Calçado, Lda | 108.9 | 1 466 |
| Sopropé - Organizações de Calçado, S.A. | 99.2 | 745 |
| M. Neves & B. Neves, Lda. | 43.3 | 383 |
| ARA Shoes Portuguesa, Unipessoal | 40.7 | 420 |

SECTORIAL ORGANIZATIONS

APICCAPS – Portuguese Footwear, Components and Leather Goods Manufacturers' Association | www.apiccaps.pt
CTCP – Portuguese Footwear Technological Centre | www.ctcp.pt

FAIRS & EVENTS

n.a.



P O R T U
G U E S E
S H O E S

A P I C C A P S

