

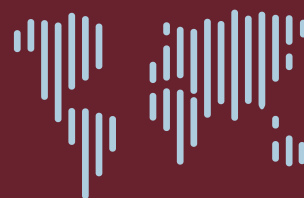
W O R L D

SAMPLE
REPORT

F O O T W E A R

Y E A R B O O K

2 0 2 5



WORLD FOOTWEAR
by Portuguese Shoes

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APICCAPS 2025

Detailed terms at www.worldfootwear.com

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P R O D U C T I O N



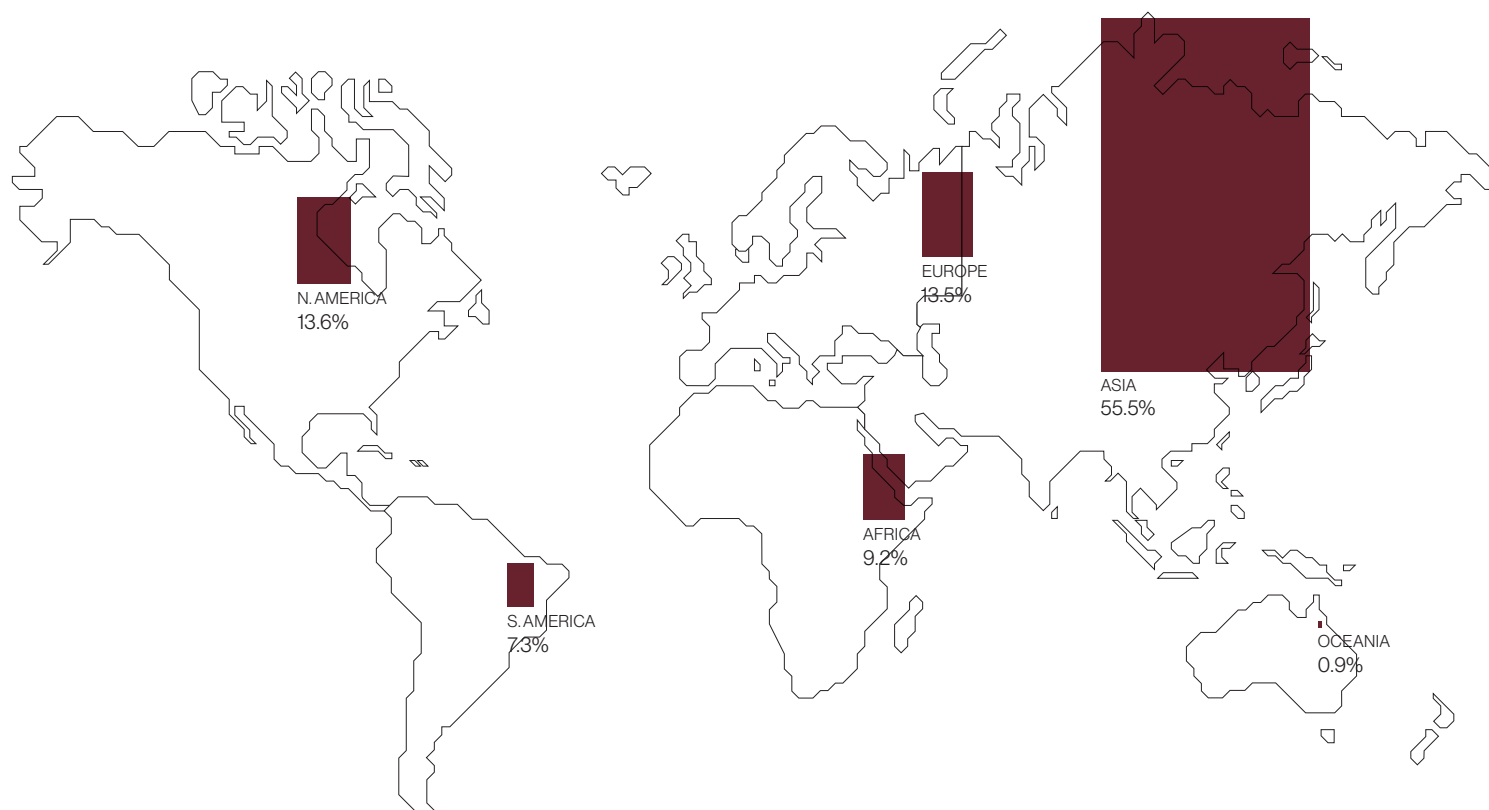
Map 1 — Distribution of Footwear Production by Continent (Quantity) 2024

In 2024, global footwear production rebounded strongly, rising by 6.9% to reach 23.9 billion pairs. This marked a significant recovery from the previous year's downturn and brought output close to its highest level in the past decade. The growth was especially pronounced in Asia, where production surged by 8%, reinforcing the region's dominance in the global market. As a result, Asia's share of worldwide footwear production climbed to 88%. Production

also increased in South America and Africa that represent 5.0% and 3.2% of world production. In contrast, Europe experienced a sharp decline of 9.5%, reducing its contribution to just 2.3% of global output. These shifts underscore the growing concentration of manufacturing in Asia and the challenges facing European producers in maintaining competitiveness within the global footwear industry.

23.9 billion
pairs of shoes
produced in 2024

C O N S U M P T I O N



Map 2 — Distribution of Footwear Consumption by Continent (Quantity) 2024

Structural forces such as demographic shifts and economic development continue to shape global footwear consumption patterns in gradual but decisive ways. Since the first edition of the Yearbook, Asia's share of global consumption has risen from 49% to 55.5%, a figure that is expected to grow further. Despite this increase, *per capita* consumption in Asia remains relatively low at just 2.5 pairs per year – well below levels seen in other regions – indicating significant

room for future growth. In contrast, Europe's share of global consumption has been steadily declining and, for the first time in 2024, fell behind North America which leads the world in *per capita* footwear consumption. Meanwhile, consumption in Africa remains subdued but is projected to expand over the long term. These trends highlight persistent global disparities in consumption.

In 2024 Europe fell to 3rd place in terms of consumption

EXPORTS

In 2024, global footwear exports experienced a 4.6% increase in volume compared to the previous year, signaling a steady recovery in international trade. Asia remained the dominant player, accounting for 85.1% of total exports – slightly above the 84.5% share it held a decade ago. Meanwhile, Europe has seen a modest rise in its global share, climbing from 12.5% to 12.6% over the same period. The combined contribution of other continents continues to be minimal, representing less than 2.5% of worldwide exports. While the overall distribution remains largely stable, these figures reflect the continuation of the trend for the geographic concentration of exporting activity.

+4.6%
Variation of worldwide footwear exports in 2024

In 2024, the global footwear export market remained highly concentrated, with the top 10 exporters accounting for 88.1% of total shipments – unchanged from the previous year. China maintained its dominant position, exporting 9.2 billion pairs and capturing 62.2% of global share, though this marked a slight decline from 63.8% in 2023. Vietnam and Indonesia gained ground, increasing their shares to 10.7% and 4.1%, respectively. These shifts may reflect broader supply chain realignments, as companies diversify sourcing in response to ongoing trade tensions between the United States and China. India and Cambodia also posted modest gains, while Türkiye and Italy saw declines. Spain exited the top 10, replaced by the Netherlands. While China's lead remains formidable, the evolving geopolitical landscape – particularly the United States / China trade dynamic – could accelerate the rise of alternative manufacturing hubs in Southeast and South Asia.

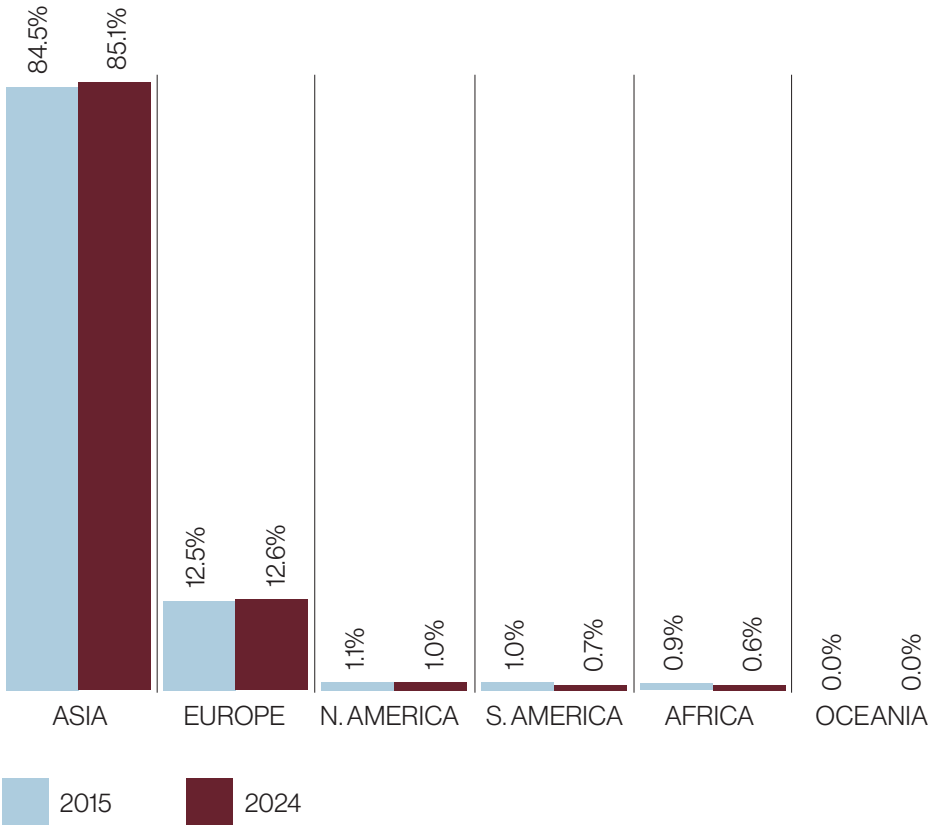


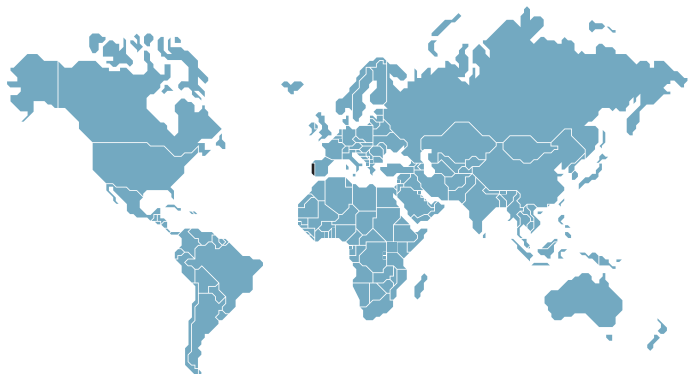
Chart 3 — Distribution of Footwear Exports by Continent of Origin (Quantity) 2015-2024

RANK	COUNTRY	PAIRS (MILLIONS)	WORLD SHARE
1	CHINA	9 203	62.2%
2	VIETNAM	1 583	10.7%
3	INDONESIA	601	4.1%
4	GERMANY	351	2.4%
5	INDIA	266	1.8%
6	TÜRKIYE	238	1.6%
7	BELGIUM	216	1.5%
8	CAMBODIA	207	1.4%
9	NETHERLANDS	185	1.3%
10	ITALY	185	1.2%
TOP 10 TOTAL		13 037	88.1%

Table 3 — Top 10 Footwear Exporters (Quantity) 2024

C O U N T R Y

P R O F I L E S

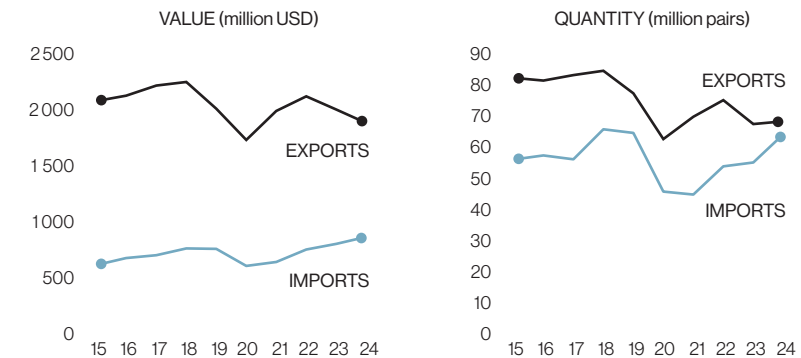


P O R T U G A L

CAPITAL	Lisbon	LANGUAGE	Portuguese
AREA (Km²)	92 230	CURRENCY	Euro
POPULATION	11 million		
GDP PER CAPITA	28 918 USD	GDP 2024	309 billion USD
Δ GDP 2024	1.9%	Δ GDP Last 5 Years	8.4%

FOOTWEAR INDUSTRY

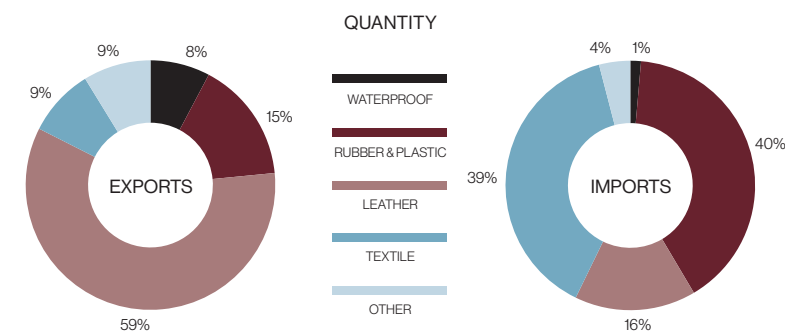
	VALUE		QUANTITY		PRICE
	Million USD	World Rank	Million Pairs	World Rank	USD
EXPORTS	1866	12	68	18	\$27.57
IMPORTS	860	36	64	45	\$13.46
PRODUCTION			76	20	
CONSUMPTION			72	48	



MAIN TRADING PARTNERS

EXPORT MARKETS	Million USD	Value Share	Million Pairs	Quantity Share	LAST 5 YEARS VARIATION			Million USD	IMPORT MARKETS	Million USD	Value Share	Million Pairs	Quantity Share	LAST 5 YEARS VARIATION			Million USD
Germany	423	23%	14.0	21%	+	Germany	18%	66	Spain	318	37%	21.8	34%	+	Germany	85%	48
France	377	20%	14.9	22%	-	Belgium	-36%	-16	Germany	103	12%	4.1	6%	+	Spain	8%	22
Netherlands	214	11%	5.4	8%	-	Denmark	-25%	-25	China	92	11%	23.5	37%	+	Belgium	32%	22
Spain	181	10%	12.6	19%	-	France	-14%	-59	Belgium	90	10%	2.4	4%	+	France	21%	13
United Kingdom	122	7%	3.4	5%	-	Netherlands	-23%	-63	France	75	9%	4.8	7%	-	United Kingdom	-73%	-18

TYPES OF FOOTWEAR TRADED



RECENT DEVELOPMENTS

In 2024, Portugal exported 68 million pairs of footwear valued at €1.87 billion, with leather shoes accounting for 83% of exports value. Imports rose to \$860 million, mainly from Spain. The industry, concentrated around Porto and employing 40,000 people, remains one of the world's top leather footwear producers. Portugal sold shoes in 170 countries, with Germany, France and the Netherlands as key markets. A new strategic plan targets €600 million in investments by 2030, focusing on sustainability and automation.

MAIN PLAYERS

	TURNOVER (million USD)	EMPLOYEES
Gabor Portugal - Indústria de Calçado, Lda	103.2	1249
Sopropé - Organizações de Calçado, S.A.	92.0	664
ECCO'Let (Portugal) - Fábrica de Sapatos, Lda	71.6	908
Ara Shoes Portuguesa, Unipessoal, Lda	54.0	703
Rodiro - Fábrica de Calçado, S.A.	53.7	398

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.

COUNTRY		CONSUMPTION (MILLION PAIRS)
CN	CHINA	4 001
IN	INDIA	2 858
US	UNITED STATES	2 102
EU	EUROPEAN UNION	2 069
BR	BRAZIL	868
JP	JAPAN	618
PK	PAKISTAN	609
ID	INDONESIA	471
BD	BANGLADESH	406
RU	RUSSIAN FED.	392
MX	MEXICO	359
DE	GERMANY	342
FR	FRANCE	333
TR	TÜRKIYE	294
AE	U.ARAB EMIRATES	284
IT	ITALY	283
PH	PHILIPPINES	274
ES	SPAIN	251
NG	NIGERIA	222
CL	CHILE	221
UK	UNITED KINGDOM	220
KR	KOREA, REP.	219
IQ	IRAQ	191
TH	THAILAND	190
IR	IRAN	174
TZ	TANZANIA	155
VN	VIETNAM	154
CA	CANADA	149
GH	GHANA	145
AU	AUSTRALIA	144
AR	ARGENTINA	138

COUNTRY		CONSUMPTION (MILLION PAIRS)
PL	POLAND	136
PA	PANAMA	130
NL	NETHERLANDS	130
MY	MALAYSIA	119
CO	COLOMBIA	113
TW	TAIWAN	107
MA	MOROCCO	106
SA	SAUDI ARABIA	103
ZA	SOUTH AFRICA	99
SN	SENEGAL	95
PE	PERU	94
CM	CAMEROON	92
ET	ETHIOPIA	85
EG	EGYPT	83
KG	KYRGYZSTAN	82
DZ	ALGERIA	78
CH	SWITZERLAND	73
PT	PORTUGAL	72
GR	GREECE	64
AO	ANGOLA	60
AT	AUSTRIA	59
YE	YEMEN	58
RO	ROMANIA	57
GN	GUINEA	57
SG	SINGAPORE	55
VE	VENEZUELA	53
SO	SOMALIA	52
MM	MYANMAR	52
CD	DEMOCRATIC REPUBLIC OF CONGO	51
KH	CAMBODIA	51

