



WORLD FOOTWEAR

20 YEARBOOK 16

For full version visit
www.worldfootwear.com

SNAPSHOT
VERSION

by
PORTUGUESE SHOES

This is a promotional version of the World Footwear Yearbook 2016. For the full version visit: www.worldfootwear.com

If you wish to use our data please refer the source as:
World Footwear Yearbook 2016 (www.worldfootwear.com)

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PRODUCTION

According to APICCAPS' assessments, the worldwide production of footwear in 2015 reached 23.0 billion pairs, 0.4% down from our revised estimate for the previous year.

In spite of minor variations in market share from year to year, the pattern for the footwear industry at the continental level has remained fundamentally unchanged since the first of these yearbooks was published in 2011: with 86.8% of world production, Asia is the hub of the footwear industry with China being its undisputed leader. In 2015, however, Chinese production decreased some 5% and its market share dropped to 59.1%, the lowest level in our records. On the other hand, India, Vietnam and Indonesia reinforced their positions. There is now no European country in the table of the top 10 manufacturers of footwear because Thailand replaced Italy at the bottom of this table. Brazil and Mexico are the only non-Asian countries in this table.

23.0 BN PAIRS PRODUCTION WORLDWIDE



IMPORTS

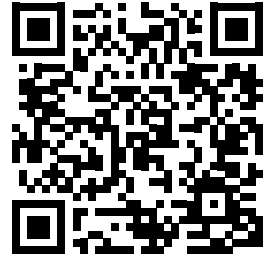
Europe leads footwear imports but its share of the world total continues to decrease, now down to 36%. But this is still more than three times its share of the world's population pointing to the purchasing power of European consumers and the openness of European markets. North America and Oceania also account for footwear imports at a percentage approximately treble that of their share of world population. On the other hand, in Africa, Asia and South America this ratio is close to 50%.

The only change this year to the list of the top 10 importers of footwear is Belgium's entry at eighth position, pushing Russia off the table. USA continues to be the largest importing country, being the destination of one out of every five pairs of footwear imported worldwide. European countries take six of the ten top spots in this table, with Asia getting the remaining three.





WORLD FOOTWEAR



EVENTS CALENDAR

ALL INTERNATIONAL FOOTWEAR EVENTS ON YOUR IPHONE OR IPAD CALENDAR

HOW IT WORKS?

The World Footwear Events Calendar is a list of events shared through an internet address. We list the events related to the footwear sector, specifically fairs. You can have the list of fairs available at your favorite calendar application always synchronized.

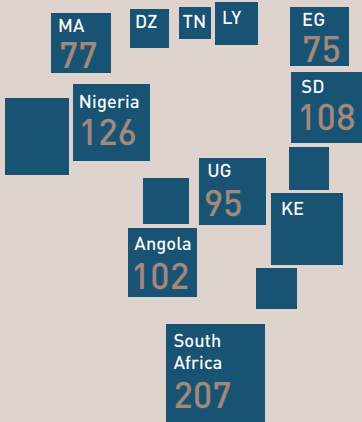
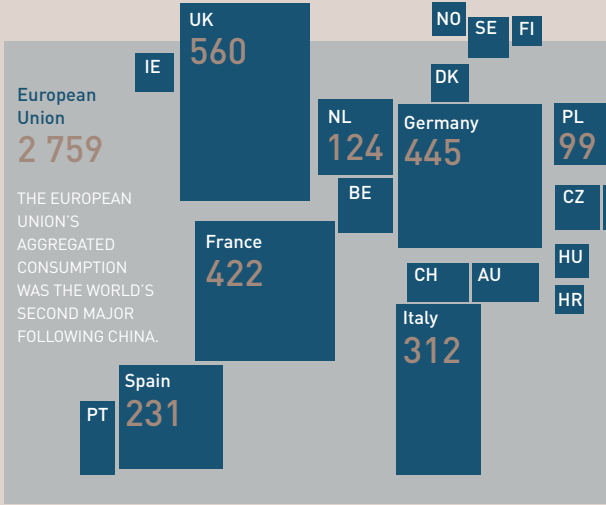
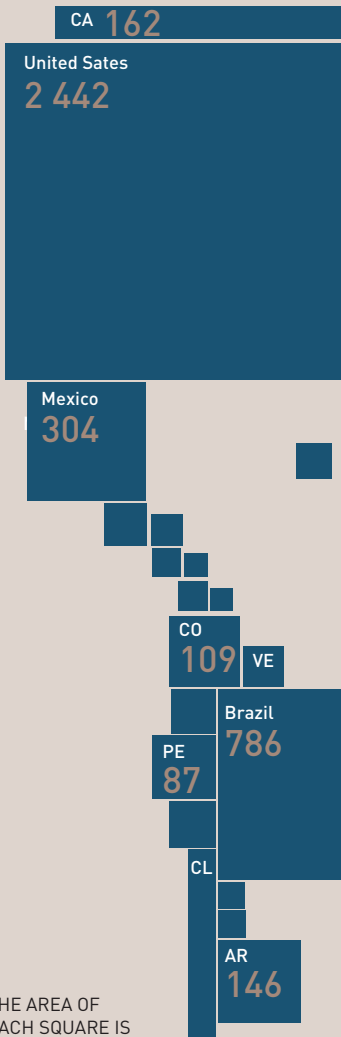
We publish the event list and your device connects to our server to download any updates.

HOW TO SUBSCRIBE?

The World Footwear Events Calendar can work on different systems / software to manage your agenda.

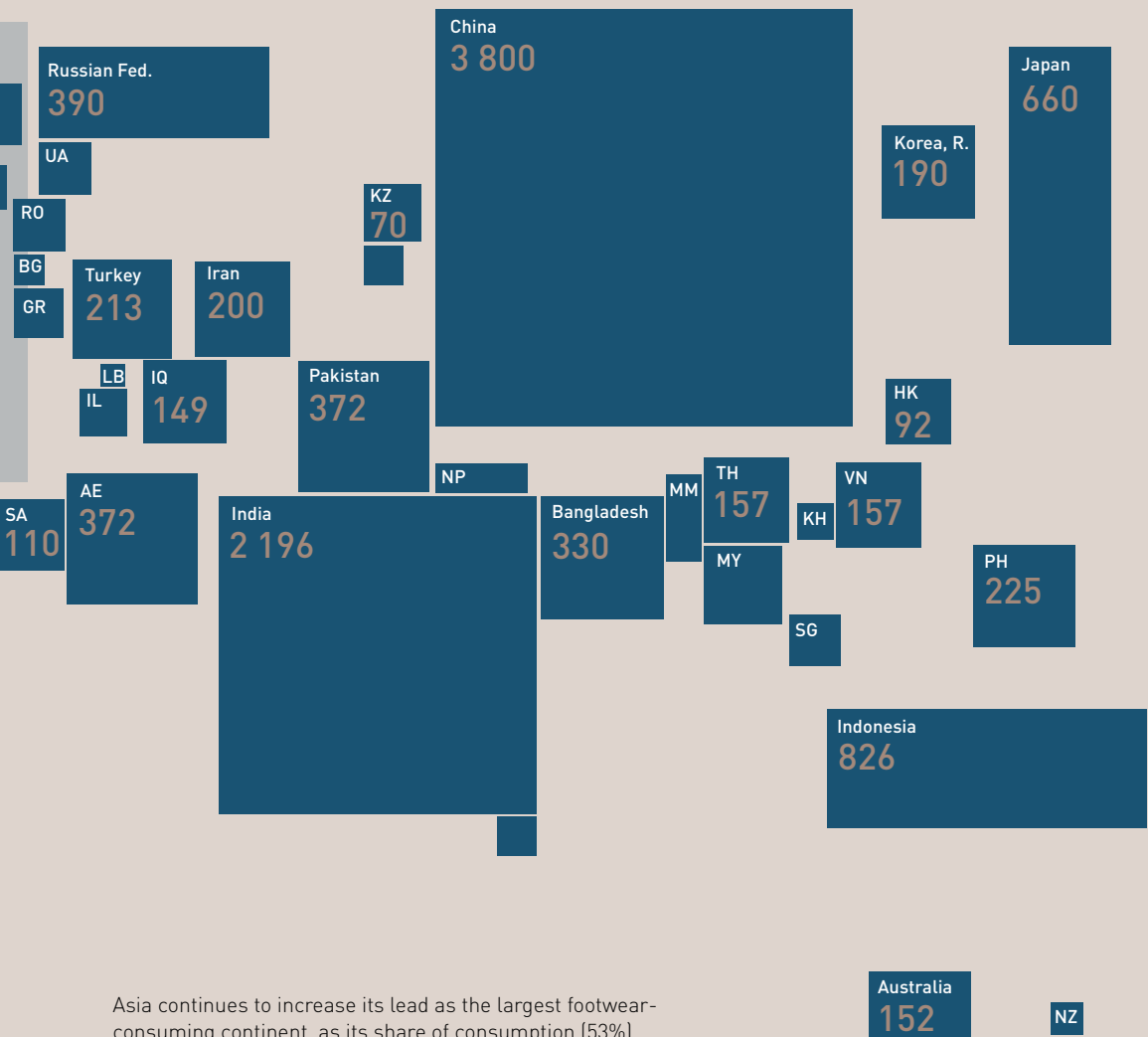
For iPhone or iPad you just have to follow the link provided by the QR code on this page.

For other systems you can find detailed instructions at www.worldfootwear.com.



THE AREA OF EACH SQUARE IS INTENDED TO BE PROPORTIONAL TO THE NUMBER OF PAIRS CONSUMED IN EACH COUNTRY

WORLD FOOTWEAR CONSUMPTION 2015



Asia continues to increase its lead as the largest footwear-consuming continent, as its share of consumption (53%) matches its share of the world population (60%). At country level, China is the largest footwear market, buying almost one out of every five pairs of shoes sold worldwide. Europe and North America still maintain footwear consumption at a higher level than their population would suggest.

EXPORT PRICES

Part of the growth in the value of exports over the decade results from the increase in their average price which went from 6.01 dollars in 2005 to 8.88 dollars in 2015, even if it declined by 0.2% last year. Earlier the upward trend was only interrupted between 2008 and 2010 as a consequence of the international economic crisis.

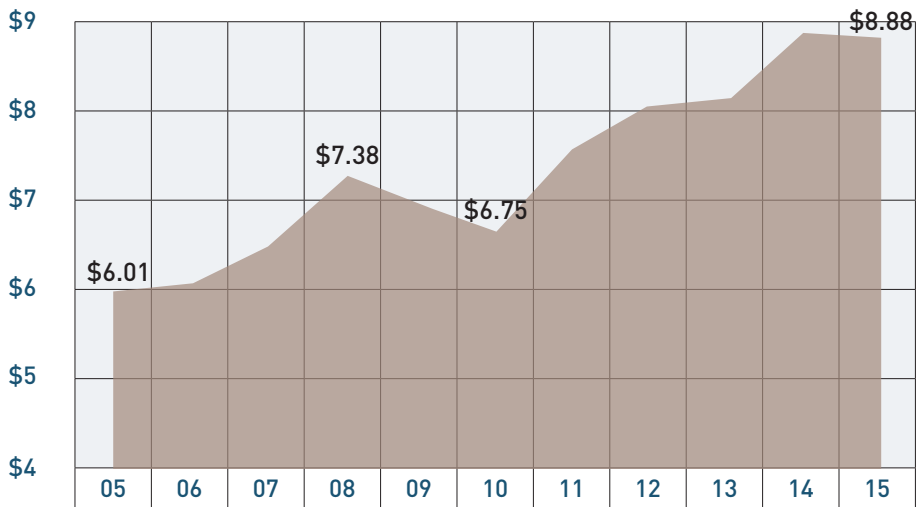


Chart 6 - World Average Export Price 2005-2015

TOP EXPORTERS

Eight out of the top 15 exporters of footwear, in terms of value, are European countries. However, China is the unchallenged leader of this rank, with a market share above 40% for the third consecutive year. Between 2013 and 2015 Vietnam increased its market share by almost 2.4 percentage points and displaced Italy as the world's second exporter. Except for the USA, joining this list at the 15th position, there is no other country in this table from outside Asia or Europe.

#	COUNTRY	USD (MILLIONS)	WORLD SHARE
1	China	51 194	40.3%
2	Vietnam	15 041	11.8%
3	Italy	9 595	7.6%
4	Belgium	5 415	4.3%
5	Germany	4 691	3.7%
6	Indonesia	3 972	3.1%
7	Hong Kong	3 578	2.8%
8	Spain	3 270	2.6%
9	France	3 149	2.5%
10	Netherlands	2 801	2.2%
11	India	2 465	1.9%
12	United Kingdom	2 191	1.7%
13	Portugal	2 069	1.6%
14	Cambodia	1 363	1.1%
15	United States	1 194	0.9%

Table 3 - Top 10 Exporters (Value) 2015

79 COUNTRY PROFILES

Albania	Guatemala	Slovenia
Algeria	Hong Kong	South Africa
Angola	Hungary	Spain
Argentina	India	Sweden
Australia	Indonesia	Switzerland
Austria	Ireland	Thailand
Bangladesh	Israel	Tunisia
Belarus	Italy	Turkey
Belgium	Japan	Uganda
Bosnia Herzegovina	Kazakhstan	Ukraine
Brazil	Korea, Rep.	United Arab Emirates
Bulgaria	Latvia	United Kingdom
Cambodia	Lebanon	USA
Canada	Lithuania	Venezuela
Chile	Luxembourg	Vietnam
China	Malaysia	
Colombia	Mexico	
Costa Rica	Morocco	
Croatia	Netherlands	
Cyprus	New Zealand	
Czech Rep.	Norway	
Denmark	Pakistan	
Dominican Rep.	Peru	
Ecuador	Philippines	
Egypt	Poland	
El Salvador	Portugal	
Estonia	Romania	
Ethiopia	Russian Federation	
Finland	Saudi Arabia	
France	Serbia	
Germany	Singapore	
Greece	Slovakia	

**79 COUNTRY
PROFILES WITH
ALL THE RELEVANT
INFORMATION FOR
EACH OF THEM**

FOR EACH MARKET

SHORT COUNTRY CHARACTERIZATION

PORTUGAL

POPULATION	10 million
LANGUAGE	Portuguese
GDP PER CAPITA	19 122 USD
GDP 2015	199 billion USD
GDP 2016	+1.5%
GDP Last 5 Years	-4.4%

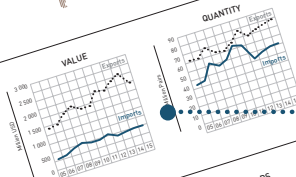
CAPITAL
Lisbon

AREA (Km²)
91 600

CURRENCY
Euro



LAST 10 YEARS EVOLUTION



FOOTWEAR INDUSTRY

VALUE	QUANTITY	PRICE
Million USD	Million Pairs	USD
2 987	13 79	216.98
32	42	170.78
79	18	
54	53	

EXPORTS IMPORTS PRODUCTION CONSUMPTION

EXPORTS	IMPORTS	PRODUCTION	CONSUMPTION
58%	32%	79%	18%
		54%	53%

MAIN TRADING PARTNERS

EXPORT MARKETS	Million USD	Value Share	Quantity Share
France	454	22%	14
Germany	381	19%	13
Netherlands	297	14%	10
Spain	207	10%	14
U. Kingdom	148	7%	6

LAST 5 YEARS VARIATION

Country	Value	Quantity
Germany	370%	+38
USA	19%	+47
Netherlands	50%	+33
Denmark	9%	+18
Spain	7%	+18

IMPORT MARKETS

Country	Value	Quantity
Spain	244	42%
China	79	13%
Belgium	56	9%
Italy	47	8%

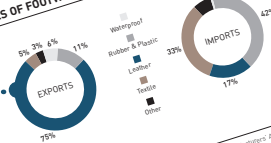
LAST 5 YEARS VARIATION

Country	Value	Quantity
China	56%	+24
China Exp.	91%	-4
Italy	-11%	-7
Ireland	-27%	-11
	7%	-18

DYNAMIC ANALYSIS OF EXPORTS AND IMPORTS BY MARKET

MAIN FIGURES FOR THE LOCAL FOOTWEAR SECTOR

TYPES OF FOOTWEAR TRADED (QUANTITY)



RECENT DEVELOPMENTS

The Portuguese footwear industry has produced a new strategic plan for 2014-2020. Investment in innovation, innovation and internationalization should allow the Portuguese industry to consolidate its position among the world's leading exporters of fashion footwear. Portugal shows a significant trade surplus based on the high average price of its exports.

MAIN PLAYERS

Company	Turnover (Million USD)	Employees
Wolven	111.8	1 136
Wolven	88.2	1 174
Wolven	27.7	627
Wolven	14.1	157

FAIRS & EVENTS

n.a.

ANALYSIS BY PRODUCT TYPE

SECTORIAL ORGANIZATIONS

APFOCAPS - Portuguese Footwear Components and Leather Goods Manufacturers Association
www.apfocaps.pt
COP - Portuguese Footwear Technological Centre (www.cop.pt)
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MAIN COMPANIES

RELEVANT ORGANIZATIONS AND EVENTS

PORTUGAL

CAPITAL	AREA (Km2)	CURRENCY
Lisbon	91 600	Euro

POPULATION	10 million
LANGUAGE	Portuguese
GDP PER CAPITA	19 122 USD
GDP 2015	199 billion USD
Δ GDP 2015	+1.5%
Δ GDP Last 5 Years	-4.6%



FOOTWEAR INDUSTRY 2015

	VALUE		QUANTITY		PRICE
	Million USD	World Rank	Million Pairs	World Rank	USD
EXPORTS	2 069	13	79	18	\$26.08
IMPORTS	586	32	54	42	\$10.76
PRODUCTION			79	18	
CONSUMPTION			54	53	

EXPORT TRADING PARTNERS 2015

EXPORT MARKETS	Million USD	Value Share	Million Pairs	Quantity Share	LAST 5 YEARS VARIATION		Million USD	
France	454	22%	16	20%	↗	Germany	21%	+65
Germany	381	18%	13	17%	↗	USA	370%	+59
Netherlands	297	14%	10	13%	↗	Netherlands	19%	+47
Spain	209	10%	14	17%	↗	Denmark	55%	+33
U. Kingdom	148	7%	6	7%	↗	Spain	9%	+18

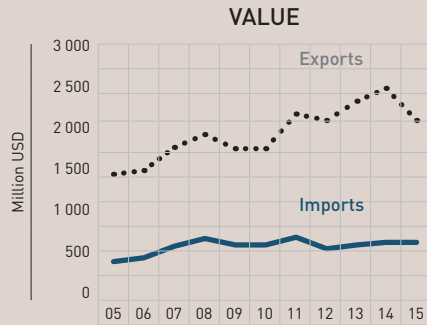
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MAIN PLAYERS

	TURNOVER (Million USD)	EMPLOYEES
Gabor Portugal - Indústria de Calçado, Lda	116.6	1 330
Ecco'Let - Fábrica de Sapatos, Lda	98.5	1 174
Sopropé - Organizações de Calçado, S.A.	89.3	633
Fortunato O.Frederico & Ca., Lda	47.0	369
Jefar - Ind. De Calçados S.A.	44.9	358

EXPORTS AND IMPORTS EVOLUTION



TYPES OF FOOTWEAR TRADED 2015 (QUANTITY)



IMPORT TRADING PARTNERS 2015

IMPORT MARKETS	Million USD	Value Share	Million Pairs	Quantity Share
Spain	244	42%	23	42%
China	70	12%	15	27%
Belgium	56	10%	2	4%
Italy	52	9%	2	3%
France	49	8%	4	7%

LAST 5 YEARS VARIATION	Million USD
↗ China	54% +24
↘ Czech Rep.	-91% -6
↘ Italy	-11% -7
↘ Ireland	-77% -11
↘ Spain	-7% -18

SECTORIAL ORGANIZATIONS

APICCAPS – Portuguese Footwear, Components and Leather Goods Manufacturers' Association | www.apiccaps.pt
 CTCPC - Portuguese Footwear Technological Centre | www.ctcpc.pt

FAIRS & EVENTS

n.a.

WWW.YKKFASTENING.COM

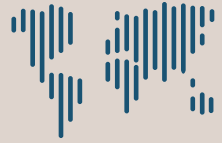
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LEATHER GOODS MANUFACTURERS' ASSOCIATION

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**SHOES &
ACCESSORIES**

**COMPETE
2020**

**PORTUGAL
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