

# FACTS & NUMBERS 2017



# PORTUGUESE SHOES

## Who are we?

- APICCAPS, the Portuguese Footwear, Components and Leather Goods Manufacturers' Association, would like to **invite you** to dedicate some minutes of your day to get to know the Portuguese Footwear Cluster and its main Facts and Numbers.

Nowadays, the footwear industry is noted as being one of the most important sectors of the Portuguese economy. Indeed, within the space of two decades, the Portuguese footwear industry has been genuinely transformed. From a traditional, labour-intensive industry it has changed into one that is modern, outward-looking and highly competitive, attaining the position of one of the most important European and worldwide exporters, particularly in the leather shoe sector.

The last decade has been a truly notable one for the footwear industry in Portugal. In summary, the companies have taken on the great challenge of internationalisation and prioritised external promotion as a major aim for the sector. Today, Portuguese footwear companies have distinguished

themselves in the international arena through their ability to offer high added-value products, manufactured by a perfect combination of the most **modern technology** with **manual production techniques** which, in many cases, have been in the family for decades. This combination of factors results in high quality products of modern design, positioned at the **upper end** of the market and in many cases in the luxury bracket, competing as equals with the major international brands, and in many cases establishing themselves as partners *par excellence* to produce those same brands.

As a result, Portugal now **exports more than 95%** of its annual production to over 150 countries, on all five continents. Foreign sales of Portuguese footwear have risen from just over 1 200 to approximately 1 900 million euros within seven years.

We now encourage you to get to know the Portuguese Footwear Cluster and some of its most impressive **Facts and Numbers**.



**WOMEN'S  
SHOES**



**MEN'S  
SHOES**



**CHILDREN'S  
SHOES**



**SAFETY  
SHOES**



**LUXURY  
SHOES**



**LEATHER  
GOODS**



**COMPONENTS**

# GENERAL DATA

## FOOTWEAR

- In 2016, Portugal exported more than **81.6 million pairs of shoes** with a total value of more than 1.9 billion euros. This performance represents a growth rate of 3.2% over 2015. A particularly positive performance considering the instability felt in foreign markets last year and the uncertainty impacting on important footwear consumer markets.

Crossing the **1.9 billion euros revenue** threshold also represented the seventh consecutive year of growth in sales to foreign markets. In this short period of time, the Portuguese footwear industry has presented an outstanding growth dynamic **increasing its exports revenue by roughly 50%**.

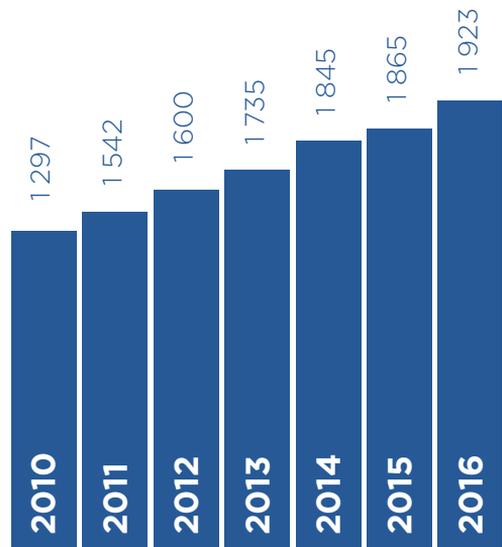
Although European countries continue to be the **main destination** for Portuguese exports, growth of foreign sales has taken place across most markets. In 2016, the main destinations for Portuguese footwear continued to be France, Germany, the Netherlands, Spain and the UK. However, the growth dynamics for this industry are particularly

noticeable in less traditional markets, such as China, New Zealand and the United States.

The Portuguese footwear industry, recognized worldwide for its high-quality products, incorporating the latest trends and with a special focus on design and innovation, now exports more than **95% of its production**.

## EXPORTS TREND (2010/2016)

Unit: Million Euros



## MOST DYNAMIC MARKETS

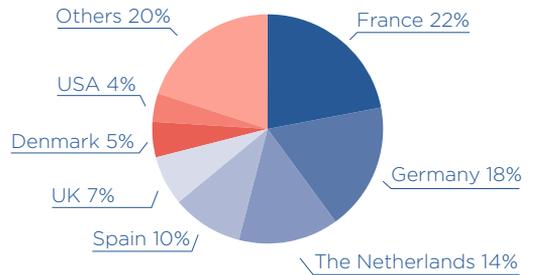
Variation 2010-2016

<b>Germany</b>	103
<b>The Netherlands</b>	83
<b>USA</b>	65
<b>Denmark</b>	50
<b>Spain</b>	47
<b>France</b>	30
<b>Sweden</b>	21
<b>Poland</b>	17

Unit: Million Euros

## DESTINATION MARKETS

2016



## FOOTWEAR SECTOR SNAPSHOT

2010

2016

	2010	2016
<b>Companies</b>	1 245	1 473
<b>Employment</b>	32 132	38 661
<b>Exports</b>		
<b>Million Pairs</b>	69	82
<b>Million Euros</b>	1 297	1 923
<b>Imports</b>		
<b>Million Pairs</b>	66	57
<b>Million Euros</b>	426	597
<b>Trade Balance</b>		
<b>Million Euros</b>	872	1 326

# CLUSTER

## RELATED SECTORS

<b>LEATHER GOODS</b>	<b>2010</b>	<b>2016</b>
Companies	113	120
Employment	1 005	1 546
Exports - Million Euros	42	178
Imports - Million Euros	224	332

<b>FOOTWEAR COMPONENTS</b>	<b>2010</b>	<b>2016</b>
Companies	240	277
Employment	3 848	4 952
Exports - Million Euros	46	47
Imports - Million Euros	90	175

## LOCATION

With a **strong geographic concentration**, footwear manufacturing is mainly distributed by **two hubs**, one being in the municipalities of Felgueiras and Guimarães and the other being in Santa Maria da Feira, Oliveira de Azeméis and São João da Madeira. All these five cities are located in the north of the country within sixty Km of each other. Altogether, these five municipalities account for more than **three-quarters of the sector's employment**.

This geographic concentration gives the companies easy access to a full range of services and materials they need for the manufacturing process.

## RESOURCES

Over the last decades, the cluster has undergone a radical change in the qualification profile of its human resources: the number of **qualified employees has doubled** across the board. Staff with secondary education or university degrees has increased from 3% to 9%. Without this **improvement in the educational**

**CONCENTRATION  
OF THE  
FOOTWEAR  
COMPANIES**



**profile** of its resources the strategy to upgrade the positioning of Portuguese footwear would not have been so successful. At the same time, the industry strongly invested in other areas, such as product development, design incorporation and customer service, to make it stand out from the competition.

# INDUSTRY NEWS

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## CAVALINHO INVESTS HALF A MILLION EUROS

Aimed at strengthening the internationalization process of its brand Cavalinho, the company Jacinto Azevedo & Santos announced a total investment of half a million euros for 2016 and 2017.

[www.cavalinho.pt](http://www.cavalinho.pt)

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## EUREKA CELEBRATES 30 YEARS

With a constant presence on the main national catwalks plus a network of 30 stores throughout the world, the Portugal-based brand celebrated in 2016 three decades since its establishment. Last year the brand opened new stores in Germany and in The Netherlands.

[www.eurekashoes.com](http://www.eurekashoes.com)

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## JOSEFINAS OPENS STORE IN NEW YORK

Until 2016 the Portuguese-based brand only marketed its products online. Now they have chosen the city of New York to open their first physical store. Josefinas, created in 2013, is best known for having created the world's most expensive ballerinas. Over the past three years, the brand has been the chosen footwear for such famous people as Chiara Ferragni, Olivia Palermo and Danielle Bernstein.

[www.josefinas.com](http://www.josefinas.com)

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## DYNAMIC EMPLOYMENT

The Footwear Cluster in Portugal already employs more than 45 000 people. Since 2010, when official statistics pointed to a total of 36 985 workers working in the industry, Portuguese companies have created more than 8 000 new jobs.

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## **ICONIC: THE NEW PORTUGUESE SHOES CAMPAIGN**

At the end of the year APICCAPS launched its collective image campaign named Iconic. Actress Victoria Guerra returns to the Portuguese Shoes campaign representing six icons, epitomising the history of our industry, all the while highlighting its successful evolution season after season. Communication in an industry looking to be the sexiest in the world, demands constantly having to reinforce impact and reputation. This new campaign consolidates the achievements and goals that have championed Portuguese brands and professionals over recent decades.

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## **MORE THAN 300 NEW FOOTWEAR BRANDS**

Over the last decade Portuguese footwear companies have created more than 342 new footwear brands, according to numbers released by the Portuguese Footwear Technological Centre.

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## **CENTENÁRIO CELEBRATES 75TH ANNIVERSARY**

Centenário started its operations in the forties as a footwear factory with a 100% handmade manufacturing process and was mostly focused on the domestic market. 75 years have passed, and now Centenário is a manufacturer of men's footwear of superior quality, exporting 98% of its production. In 2005 the Goodyear system was implemented and the company started manufacturing shoes for golf, reaching out to a niche market with huge growth potential given the significant increase in the take-up of this sport worldwide.

[www.centenario.com.pt](http://www.centenario.com.pt)

# INDUSTRY NEWS

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## **INDUSTRY STRENGTHENS PARTNERSHIPS WITH DESIGNERS**

Relationships become more consolidated every year with new creative partnerships being formed in 2016 between the Portuguese footwear companies and the national designers. About two dozen partnerships stepped up on to the catwalks to show off some of the best products made in Portugal.

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## **PORTUGAL WITH STRONG PRESENCE AT THEMICAM**

98 Portuguese companies took part in theMICAM and MIPEL (Accessories Fair) the last time these events were held. This was the largest presence ever at an event abroad. The presence at international footwear fairs in general, and at theMICAM (the biggest footwear trade fair in the world), forms part of the promotional strategy drawn up by APICCAPS, as it aims to consolidate the position of Portuguese footwear in foreign markets.

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## **ARCOPÉDICO DEVELOPS NEW GROUNDBREAKING STUDY**

In 2016, while celebrating 50 years in existence, the Portugal-based company Ropar, owner of the Arcopédico brand, opted to go back to the drawing board by way of developing the Star Shoes project. After inviting 2 400 customers from 19 countries to leave a print of their feet in phenolic boxes, the project will draw a world map of the feet of the inhabitants of the globe.

[www.arcopedicoshoes.com](http://www.arcopedicoshoes.com)

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## **SOFTINOS CONSOLIDATES INTERNATIONALIZATION PRESENCE**

The Portuguese brand was born in 2008 within the Kyaia group, the owner of the worldwide known brand Fly London. In less than a decade Softinos has already gained presence in more than 30 international markets.

[www.softinos.com](http://www.softinos.com)

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## **NEW COMMUNICATION CAMPAIGNS TO PROMOTE THE INDUSTRY**

Having developed a campaign dedicated to Children's and Luxury Footwear, new initiatives were launched to promote the Leather Goods and Components sectors. These more specific and more targeted image campaigns are being developed for the cluster subsectors in addition to the sectorial campaign which APICCAPS has been developing since 2009.

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## **NEW FOOTWEAR MUSEUM OPENS IN PORTUGAL**

Located in São João da Madeira, one of the regions of historic significance for the footwear industry in Portugal, the Footwear Museum was inaugurated on the 5th of November and celebrates an industry with a rich history and with hundreds of stories to tell. With more than 500 shoes on show in the exhibition and a global collection of more than 7 000, the museum also features machinery and tools that were used in the manufacture of countless pairs of shoes.

[www.museu-do-calcado.pt](http://www.museu-do-calcado.pt)

# FOOTURE 2020

- **By the end of the decade, the Portuguese footwear sector aims to have set itself as a key reference for the industry worldwide.**

This process should be based on the sophistication and creativity of the Portuguese industry - their products, their processes, their business models - focusing on market segments where choice is based more on taste than on price.

Keeping a national manufacturing structure is key to a market positioning where flexibility, quick response and product quality are the key features, differentiating the Portuguese industry from the competition elsewhere.

These are the key elements of the Portuguese Footwear Industry Strategic Plan (FOOTure 2020).

To implement this plan, **160 million euros** will be invested by 2020 in the areas of innovation, internationalization and qualification.

Since 2010, Portuguese footwear exports increased by 50% and now 95% of the production is exported to over 150 countries across 5 continents. To consolidate the position achieved, the sector is expected to invest over **70 million euros** in strengthening the **internationalization** process.

All the while implementing its strategic plan, the industry has specialized in quick response and small series, as features of strategic worldwide importance.

The partnership with the Portuguese Footwear Technological Center and with a network of more than

50 partners, including universities, companies, and organizations from the scientific and technological system, has supported the development of more than 100 equipment made in Portugal, providing the country with the ability to export **high-technology** for shoes. To maintain this state of the art, a further **50 million euros** are being invested.

Finally, the **upskilling** of human resources is set to contribute to the industry's rejuvenation with the introduction of a new generation of talent. Training for top management, design and entrepreneurship skills are also essential. The investment in these areas will be around **36 million euros**.

#### STRATEGIC INITIATIVES

QUALIFY AND RENOVATE

INNOVATE

INTERNATIONALIZE AND COMMUNICATE

FOOTURE2020

# VISION

TO BE A KEY REFERENCE FOR THE  
WORLDWIDE FOOTWEAR INDUSTRY

# PORTUGUESE SHOES NEAR YOU

- In 2016, more than 150 Portuguese companies have been present in over 60 international initiatives, attending the industry's main trade fairs. Go to [www.portugueseshoes.pt](http://www.portugueseshoes.pt) to see where you can find us.

To support the internationalization process, APICCAPS has been developing **collective image campaigns** under the signature Portuguese Shoes. This has resulted in significantly improving the international image of Portuguese footwear. To complement this work, companies have implemented **individual initiatives**, contributing to strengthening the positive perception of Portuguese footwear around the world.

The positioning of Portuguese footwear in the **medium / high price segment** and a small domestic market consuming only 5% of national production, has prompted in a sectoral strategy based on a strong **focus on foreign markets** and exporting.

Facing a highly competitive environment in the international arena, Portuguese footwear has not entered into any price wars where Asian countries dominate the business. The basis of the performance and distinctiveness of Portuguese companies is their capacity to produce **good quality products**, incorporating **design and innovation**, allied to the provision of **flexible service and a quick response**.

To promote themselves and their products Portuguese companies have regularly attended the **industry's major events**, such as international fairs, in order establish contact with potential clients to highlight what distinguishes the Portuguese industry from its most direct competitors, and so enhancing the progression in the value chain.

**+60 INITIATIVES**  
**+150 COMPANIES**



## CREDITS

**Title**  
**Director**  
**Coordination**  
**Graphic Design**  
**Owner**

Facts & Numbers 2016  
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May 2017

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**Production**  
**Copies**  
**Date**

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