

A P I C C A P S

ASSOCIAÇÃO PORTUGUESA DOS INDUSTRIAIS DE CALÇADO  
COMPONENTES E ARTIGOS DE PELE E SEUS SUCEDÂNEOS

# FACTS & NUMBERS



PORTU  
GUESE  
SHOES  
DESIGNED BY  
THE FUTURE

# 1 STATISTICAL ANALYSIS 2014

Portugal exported, in 2014, 77 million pairs of shoes, valued at 1846 million euros.

Exports grew by 6.3% compared to 2013

2014 was the fifth consecutive year with footwear exports growth

Since 2009 footwear exports increased by 50%

Portuguese footwear is currently exported to more than 150 markets located in the five continents

Exports to countries outside the EU already represent 13% of the total exports

## MAIN MARKETS

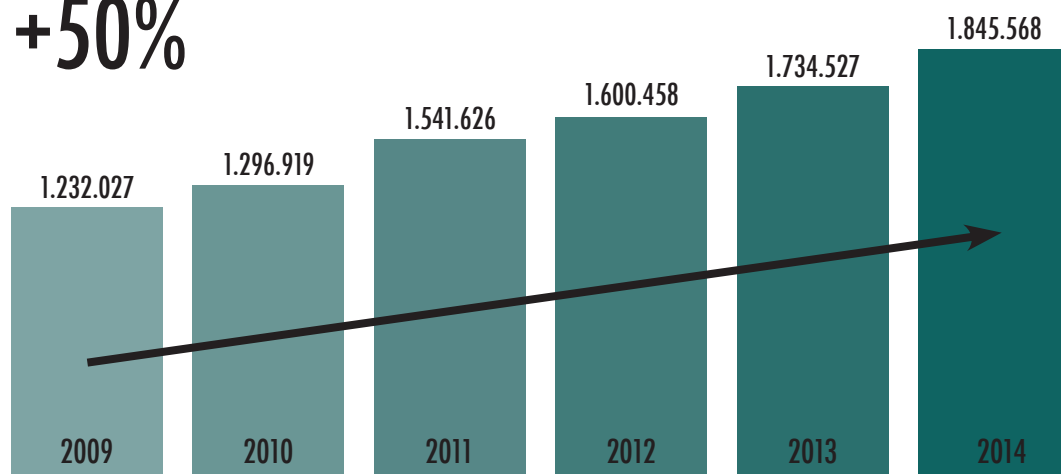
- France 426 M€ (+ 0,2%)
- Germany 339 M€ (+ 6,2%)
- The Netherlands 254 M€ (+ 9,5%)
- Spain 177 M€ (+ 6,0%)
- United Kingdom 133 M € (+ 4,5%)

## MOST DYNAMIC MARKETS

- USA + 69% (46 M€)
- Australia + 34% (11 M€)
- Emirates + 24% (6 M€)
- Canada + 23% (23 M€)

## EXPORTS TREND (2009/2014)

+50%



Unit: Thousand Euros

## GENERAL DATA

### FOOTWEAR INDUSTRY

Companies	1 430
Employment	37 781

### FOREIGN TRADE

Exports	
million pairs	77
million euros	1 846
Imports	
million pairs	54
million euros	449
Trade Balance	
million euros	1 396

# 2 EXTERNAL PROMOTION 2015



- + 60 initiatives
- + 150 companies
- + 700 participations

# INTEGRATED COMMUNICATION PLAN

Fairs and Missions

Fashion Shows

Buyers Mailing

Fashion Editorials

World Footwear Report

Portuguese Soul Magazine

Press Kits

Merchandising

Public Figures Sponsorship

Social Networks

TV Programs



## AROUND THE WORLD IN 365 DAYS

# 3

## The news of the industry in 2014

### **APICCAPS launches Portuguese Shoes TV**

To reach a broader public APICCAPS created in February the Portuguese Shoes TV, an online platform gathering all footwear related digital media. Additionally, it launched What's up - Olhar a Moda, a TV program exclusively dedicated to Portuguese footwear, with monthly broadcasting through the public TV channels (RTP2, RTP Informação, RTP Internacional, RTP África, RTP Açores and RTP Madeira). Every month a newsletter is sent to thousands of contacts with the videos featured in each program.

### **CR7 launches footwear brand**

The best football player in the world announced a new line of footwear: CR7 Footwear. The announcement was made through the player's official website in July and proudly announced as 100% made in Portugal.

### **Fly London opens store in New York**

While celebrating its 20 years of existence, the brand from Guimarães continued to consolidate its presence in the global market. Fly London opened the first store in New York, taking another step in the conquest of the North American market.

### **Shoes are the main character in new book by APICCAPS**

In November, the Portuguese Footwear Association has published its second edition of the Portuguese Soul book, a contribution to the worldwide promotion of the footwear industry and national fashion, positioning Portugal as an international design reference.

## **Portugal launches the world's largest information platform**

After consolidating the World Footwear Yearbook as the main publication analysing the international footwear industry, APICCAPS, launched in 2014 an online platform dedicated to the worldwide footwear industry. World Footwear News is a digital platform focusing on the production and dissemination of diverse editorial content that depicts the daily life of the footwear industry in dozens of countries.

## **Luis Onofre receives Golden Globe for Best Designer**

The Portuguese designer Luis Onofre won in 2014, the Golden Globe for Best Designer, thus becoming the first designer exclusively dedicated to footwear to be awarded the golden statuette. In 2014, Luis Onofre also inaugurated its first mono-brand store at Avenida da Liberdade in Lisbon, one of the main commercial avenues in the city.

## **Dynamic employment**

More than one thousand new jobs have been created by the Portuguese footwear industry throughout 2014. An important contribution to the industry's strategy of improving its ability to respond rapidly, focusing on direct contact with customers.

## **Industry strengthens partnerships with designers**

A relationship which becomes more strong every year with new creative partnerships taking place in 2014 between the Portuguese footwear companies and the national designers. About two dozen partnerships rose to the stage of national fashion and showed the public what is best made in Portugal.

## **President Cavaco Silva distinguished footwear personalities**

Integrated in a visit to the industry under the initiative Roadmap for a Dynamic Economy, Portuguese President Cavaco Silva awarded 6 footwear entrepreneurs and APICCAPS' General Manager, for their special contribution to the positive performance of the Portuguese footwear industry in international markets.

# 4

## 2020 FOOTURE

(Strategic plan for the footwear cluster)

By the end of the decade, the Portuguese footwear sector aims to achieve a qualitative leap in its international affirmation process, setting itself as a key reference for the worldwide industry.

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

To keep a national manufacturing structure is a key condition for a market positioning where flexibility, quick response and product quality are the competing arguments, differentiating the national industry from the competition from other sources.

High competitiveness rates needed to maintain this manufacturing structure cannot question the demanding sustainability standards or the social responsibilities, and should on the contrary lean on them. With this in mind, the footwear cluster has to have known-how and innovation as its structuring values.



## VISION

TO BE A REFERENCE IN THE WORLDWIDE FOOTWEAR INDUSTRY



### STRATEGIC INITIATIVES

Sophistication and criativity	National manufacturing structure	Sustainability and responsability	Knowledge and innovation
▶ QUALIFY AND RENOVATE			
▶ INNOVATE			
▶ INTERNATIONALIZE AND COMMUNICATE			

FOOTURE 2020

CLUSTER DENSIFICATION



# PORTU GUESE SHOES

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DESIGNED BY  
THE FUTURE

COMPETE  
2020

PORTUGAL  
2020



UNIÃO EUROPEIA  
Fundos Europeus Estruturais  
e de Investimento