

APICCAPS

PORTUGUESE FOOTWEAR, COMPONENTS AND
LEATHER GOODS MANUFACTURERS' ASSOCIATION

FACTS & NUMBERS

PORTU
GUESE
SHOES
DESIGNED BY
THE FUTURE

1 STATISTICAL ANALYSIS 2015

Portugal exported 79 million pairs of shoes, valued at 1 865 million euros.

2015 was the sixth consecutive year with footwear exports growth
Exports grew by 1.1% compared to 2014

Since 2009 footwear exports increased by 51%

Portuguese footwear is currently exported to more than 152 markets located in the five continents
Exports to countries outside the European Union already represent 14% of the total exports

MAIN MARKETS

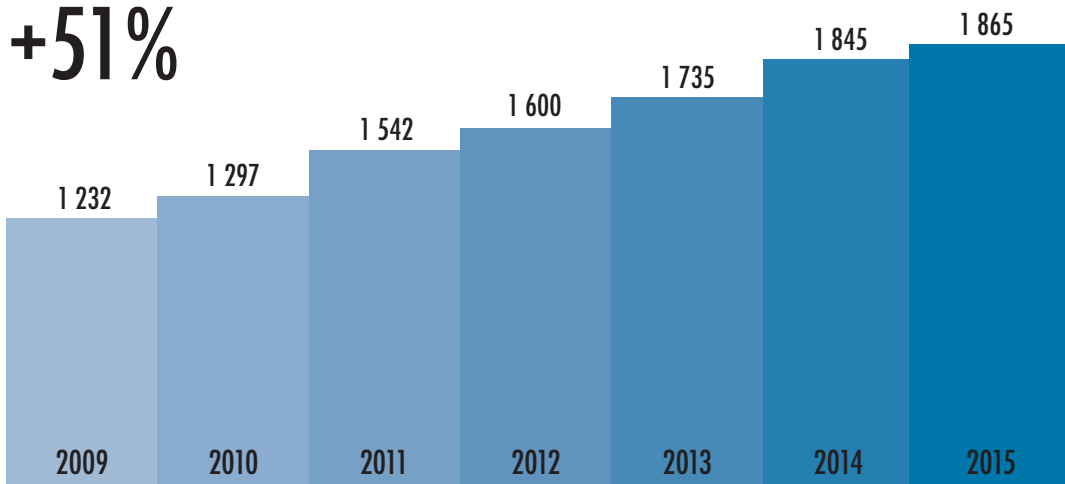
- France 411 M€
- Germany 343 M€
- The Netherlands 266 M€
- Spain 191 M€
- United Kingdom 134 M€

MOST DYNAMIC MARKETS

- USA + 48%
- China + 91%
- Poland + 38%
- Spain + 8%
- Australia + 11%

EXPORTS TREND (2009/2015)

+51%



Unit: Million Euros

GENERAL DATA

FOOTWEAR INDUSTRY

Companies	1 446
Employment	38 727

INTERNATIONAL TRADE

Exports	
million pairs	79
million euros	1 865
Imports	
million pairs	54
million euros	528
Trade Balance	
million euros	1 337

2

FOOTURE 2020

(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.

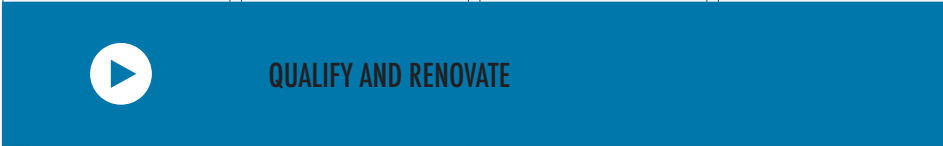

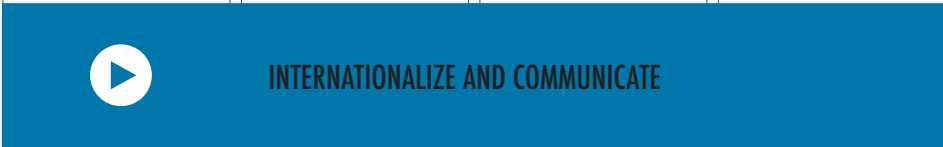
Maintaining this manufacturing structure requires high competitiveness rates which must lean on high level standards and social responsibilities. With this in mind, the footwear cluster has to have known-how and innovation as its structuring values.

VISION

TO BE A REFERENCE IN THE WORLDWIDE FOOTWEAR INDUSTRY



STRATEGIC INITIATIVES

Sophistication and creativity	National manufacturing structure	Sustainability and responsibility	Knowledge and innovation
 <p>QUALIFY AND RENOVATE</p>			
 <p>INNOVATE</p>			
 <p>INTERNATIONALIZE AND COMMUNICATE</p>			

FOOTURE 2020

CLUSTER DENSIFICATION



3

EXTERNAL PROMOTION



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



The positioning of Portuguese footwear in the medium / high price segment and a small domestic market, consuming only 5% of the national production, resulted in a sectoral strategy based on a strong orientation to foreign markets and exports.

Facing a highly competitive environment in the international arena, Portuguese footwear has been away from price wars where Asian countries dominate the business. The basis of the performance and distinction of the Portuguese companies is their capacity to produce good quality products, incorporating design and innovative features, allying it to the provision of flexible service and a quick response.

To promote themselves and their products Portuguese companies have been present at the major events of the industry through a consistent presence in international fairs, contacting with potential clients and highlighting what distinguishes the Portuguese industry of its most direct competitors, continuing the progression in the value chain.

In 2015, more than 150 Portuguese companies have been present in over 60 initiatives attending the main international trade fairs.

AROUND THE WORLD IN 365 DAYS

4 INTEGRATED COMMUNICATION PLAN

Through the years APICCAPS has been developing collective image campaigns under the signature Portuguese Shoes, which have resulted in a significant improvement of 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.

www.portugueseshoes.pt

A Fairs and Missions

B Fashion Shows

C Press Adverts

D Merchandising

E Buyers Mailing

F Fashion Editorials

G PR Campaigns

H Social Networks



The signature
"Designed by the Future"
is a statement of the industry's
ability and its orientation
for the future.

5 INTELLIGENCE TO DRIVE YOUR BUSINESS



WORLD FOOTWEAR

World Footwear is an initiative of APICCAPS
with two main communication channels:

An annual edition of the
World Footwear Yearbook

www.worldfootwear.com
An electronic platform
and weekly newsletter

The most complete and updated calendar
displaying all footwear related events

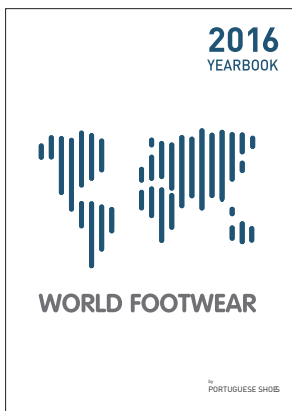
Website

The [World Footwear website](#), with 20 000 monthly pageviews, is updated daily with articles relating to the footwear sector, with particular emphasis on production, trade and market dynamics, as well as relevant information about footwear companies.

On the back of the news platform a weekly newsletter with the most up-to-date articles is distributed to roughly 8 500 subscribers all over the world.



Yearbook



The [World Footwear Yearbook](#) is a comprehensive report that analyses the main trends within the footwear sector around the world. The aim of the publication is to analyze the position of relevant countries of the footwear industry in terms of different variables (Production, Exports, Imports and Consumption) and to evaluate the strategic positioning of the different sector players.

Sections about the dynamics of international trade and geographical patterns and dozens of country profiles are included, allowing a further understanding of the industry within each one of the main industry players.

Calendar

The World Footwear Calendar is the most complete and updated calendar showing all relevant footwear industry related events, trade fairs and conferences. Easily synchronized with iPhones, iPads and smartphones, with Microsoft Outlook, Google calendar, Windows live and Windows mobile, it is the best tool to ensure users do not miss an event.



World Footwear Calendar

[Click here](#) to subscribe an updated version of the calendar displaying the footwear trade shows



160 MILLION EUROS INVESTMENT

As part of the implementation of its Strategic Plan Footure 2020 the Portuguese Footwear Industry will invest 160 million euros by 2020 in the areas of innovation, internationalization and qualification.

In the last decade two hundred Portuguese footwear companies have been present in virtually every major international fairs and events. As a result of this strong international activity, Portugal currently exports more 95% of its production to over 152 countries across the five continents.

Since 2009 footwear exports increased by 51% and to consolidate the position achieved the sector is expected to invest over 70 million euros strengthening the **internationalization** process.

While implementing its strategic plans, the industry specialized in quick response and small series, claiming them as features of strategic importance worldwide. The work done in partnership with the Portuguese Footwear Technological Center and with a network of more than 50 partners, including universities, companies, and organizations of scientific and technological system, promoted the development of more than 100 equipment made in Portugal, which gives the country the ability to export **high technology** for shoes. The Portuguese industry wants to strengthen its status of modernity and continue to focus on the development of new techniques, technology and materials, and for such will invest 50 million euros in this area.

Finally, the **qualification** of resources should contribute to rejuvenate the industry with the introduction of a new generation of talent. If the attraction of young people is important, training for top management, design and entrepreneurship skills are essential and the investment in these areas will be around 36 million euros.

7 THE NEWS OF THE INDUSTRY

PORTUGUESE COMPANIES STRENGTHEN INTERNATIONALIZATION

While celebrating its 20 years of existence Fly London opened the first store in New York, taking another step in a market which already represents 20% of its global sales. Footwear brand Nobrand opened its first store in 2015 in Medellin, while it reinforced its presence in the international markets and continued to launch new products. Eureka, with a distribution network of roughly 30 stores in Portugal, also inaugurated its first shop abroad, in Luxembourg.

www.flylondon.com

www.nobrand.pt

www.eurekashoes.com

INDUSTRY STRENGTHENS PARTNERSHIPS WITH DESIGNERS

A relationship which becomes more consolidated every year with new creative partnerships taking place in 2015 between the Portuguese footwear companies and the national designers. About two dozen partnerships rose to the catwalks showing some of the best products made in Portugal.

DYNAMIC EMPLOYMENT

Footwear companies in Portugal already employ more than 43 000 people. Since 2010, when official statistics pointed to a total of 34 602 workers working within the footwear industry, Portuguese companies have created more than 9 200 new jobs.

MORE THAN 300 NEW FOOTWEAR BRANDS

In the last decade, Portuguese footwear companies created more than 342 new footwear brands. In the first half of this year, eight new brands have already emerged in Portugal, according to numbers released by the GAPI (Support Office for the Promotion of Industrial Property) from the Portuguese Footwear Technological Centre.

CR7 FOOTWEAR AVAILABLE IN 2 DOZEN COUNTRIES

After announcing a new line of footwear, Cristiano Ronaldo, the best soccer player in the world has reached a new milestone. The shoes labelled CR7, 100% made in Portugal, are now available in more than 20 countries.

www.cr7footwear.com

ONLINE GAINS STRENGTH

Footwear designer Luis Onofre, who has been awarded with the Golden Globe for Best Designer, has launched in 2015 a new online store to consolidate the connection between brand and public. Fashion Designer Fátima Lopes inaugurated a new online store with her Autumn / Winter 2015/16 women's footwear collection.

www.luisonofre.com

www.fatima-lobes.com

THE MOST EXPENSIVE BALLET FLATS IN THE WORLD

The Blue Persian Salt model is part of the collection 1001 Nights by Josefina. With soles and insoles made of natural leather, the model is adorned with a beautiful piece of fine jewelry, handmade by master Portuguese jewelers from Gold and Blue Topazes, a rare and beautiful mineral only found in Iran.

www.josefinas.com

PORTUGAL WITH STRONG PRESENCE AT THEMICAM

98 Portuguese companies participated at theMICAM and MIPEL (Accessories Fair) in the last edition of the event. This was the largest presence ever in an event abroad. The presence at international footwear fairs in general, and at theMICAM (the biggest footwear trade fair in the world), is part of the promotional strategy defined by APICCAPS aiming to consolidate the position of Portuguese footwear in foreign markets.

INÊS CALEIRO DISTINGUISHED WITH DREAM AWARD

Guava's founder and creative director saw her work being distinguished with the Dream Award, dedicated to the most promising designers and established with the "mission of discovering new talents, and take them to stardom" (Fashion Crowd Challenge).

www.guava.shoes



www.apiccaps.pt

COMPETE
2020

PORTUGAL
2020

