


APICCAPS

PORTUGUESE FOOTWEAR, COMPONENTS AND  
LEATHER GOODS MANUFACTURERS' ASSOCIATION



# FACTS & NUMBERS 2016

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 growth in footwear exports  
Exports have increased by 1.1% compared to 2014  
Since 2009 footwear exports increased by 51%

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

## MAIN MARKETS

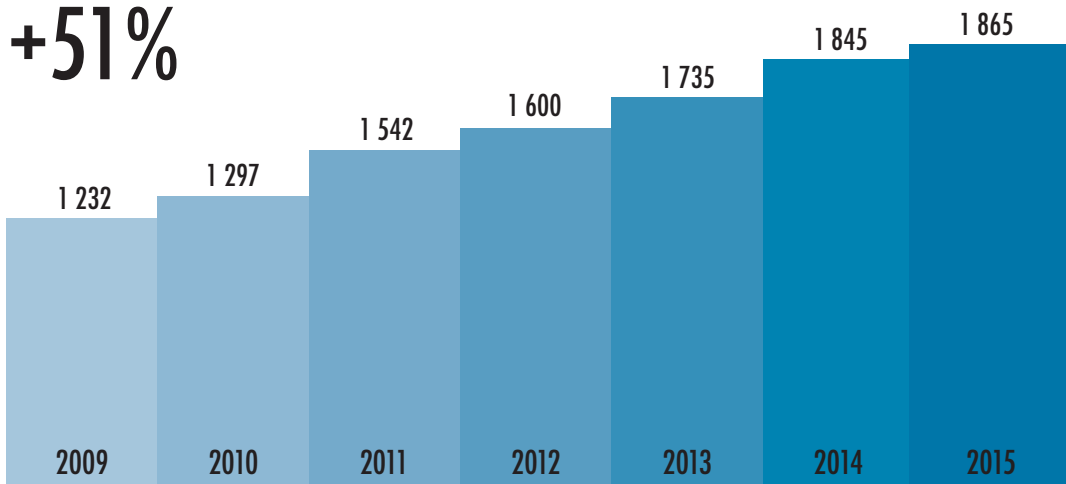
- France 411 M€
- Germany 343 M€
- The Netherlands 266 M€
- Spain 191 M€
- United Kingdom 134 M€

## 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 - its products, its processes, its business models – allowing the focus on market segments in which choice is more based on taste than price.

Keeping 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 other competitors.

Maintaining this manufacturing structure requires highly competitive rates addressing high quality standards and social responsibilities. With this in mind, the footwear cluster has to have know-how and innovation as its core values.

# VISION

TO BE A POINT OF REFERENCE FOR THE WORLDWIDE FOOTWEAR INDUSTRY



Sophistication  
and creativity

National  
manufacturing  
structure

Sustainability and  
responsibility

Knowledge and  
innovation

STRATEGIC INITIATIVES



QUALIFY AND RENOVATE



INNOVATE



INTERNATIONALIZE AND COMMUNICATE

FOOTURE 2020

CLUSTER DENSIFICATION



# 3

## EXTERNAL PROMOTION



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



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 low price segments where Asian countries dominate the business. The basis of the distinctive performance of Portuguese companies lies in their capacity to produce good quality products, incorporating design and innovative features, allied to flexible service and a quick response.

Portuguese companies have consistently attended the industry's major international events, making contact with potential clients and highlighting what sets the Portuguese industry apart from its major competitors, by way of enhancing the value chain.

In 2015, more than 150 Portuguese companies were involved in over 60 initiatives attending the main international trade fairs.

# AROUND THE WORLD IN 365 DAYS

# 4 INTEGRATED COMMUNICATION PLAN

Over the years APICCAPS has been developing an image campaign for the entire sector using the Portuguese Shoes umbrella, which have resulted in a significant improvement in 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](http://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 focus on  
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](http://www.worldfootwear.com)  
An electronic platform  
and weekly newsletter

The most complete and updated calendar  
with all footwear-related events

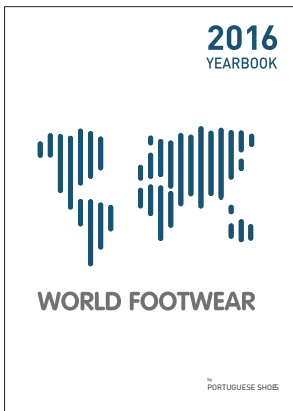
# Website

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

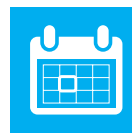


The [World Footwear Yearbook](#) is a comprehensive report that analyses the main trends within the footwear sector around the world. The aim of the publication is to analyze the position of relevant countries involved in the footwear industry in terms of different variables (Production, Exports, Imports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

Over the last decade two hundred Portuguese footwear companies attended virtually every major international fair and event. As a result of this strong international activity, Portugal currently exports more than 95% of its production to over 152 countries across the five continents.

Since 2009 footwear exports have 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 pieces of equipment made in Portugal, which gives the country the ability to export **high technology** for shoes. The Portuguese industry wants to strengthen its image 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 **upskilling** of our workforce will rejuvenate the industry by developing and introducing a new generation of talent. If the attraction of young people is important, training for top management, design and entrepreneurship skills is essential and the investment in these areas will be around 36 million euros.

# 7 INDUSTRY NEWS

## PORTUGUESE COMPANIES STRENGTHEN INTERNATIONALIZATION

While celebrating its 20 years of existence Fly London opened its 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](http://www.flylondon.com)

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

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

## INDUSTRY STRENGTHENS PARTNERSHIPS WITH DESIGNERS

Relationships become 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 in the footwear industry, Portuguese companies have created more than 9 200 new jobs.

## MORE THAN 300 NEW FOOTWEAR BRANDS

Over the last decade, Portuguese footwear companies have 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](http://www.cr7footwear.com)

## ONLINE GAINS STRENGTH

Footwear designer Luis Onofre, who has been awarded the Golden Globe for Best Designer, 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](http://www.luisonofre.com)

[www.fatima-lobes.com](http://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 jewellery, handmade by master Portuguese jewellers from Gold and Blue Topazes, a rare and beautiful mineral only found in Iran.

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

## PORTUGAL WITH STRONG PRESENCE AT THEMICAM

98 Portuguese companies took part in the MICAM 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 the MICAM (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 HONOURED 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](http://www.guava.shoes)



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

COMPETE  
2020

PORTUGAL  
2020



UNIÃO EUROPEIA  
Fundos Europeus Estruturais  
e de Investimento