

A pair of dark brown leather brogue shoes with intricate perforated patterns on the toe and side. The shoes are hanging from a green metal hanger with a wooden sole insert. The background is a blurred workshop with various tools and equipment.

Portuguese
Shoes

FACTS & NUMBERS

2023





The Portuguese footwear industry has made a strong recovery from the challenges presented by the pandemic and has recently performed with renewed confidence. In 2022, the industry achieved record-breaking exports, embarked on its largest investment projects to date, and unveiled a new sectoral strategic plan for the next decade.

APICCAPS represents the footwear Cluster, which includes three key industries: footwear, footwear components, and leather goods, which combined employ over 40.000 workers. Footwear manufacturing is the highest employer (32.000 people), followed by footwear components (5.000). The remainder are engaged in the leather goods industry. In 2022 the increase of the employment levels occurred across all industries, ranging from a 4,8% increase in footwear manufacturing to a 22% increase in leather goods. A total of roughly 1.600 companies with an average of 25 employees per unit, constitute the footwear Cluster in Portugal. Footwear manufacturing has the highest average number of employees (27), while footwear components have the lowest (19).

Number of companies

FOOTWEAR



COMPONENTS



LEATHER GOODS





Number of employees

FOOTWEAR



COMPONENTS



LEATHER GOODS



Portuguese Footwear Industry currently exports to 175 countries, in 5 continents

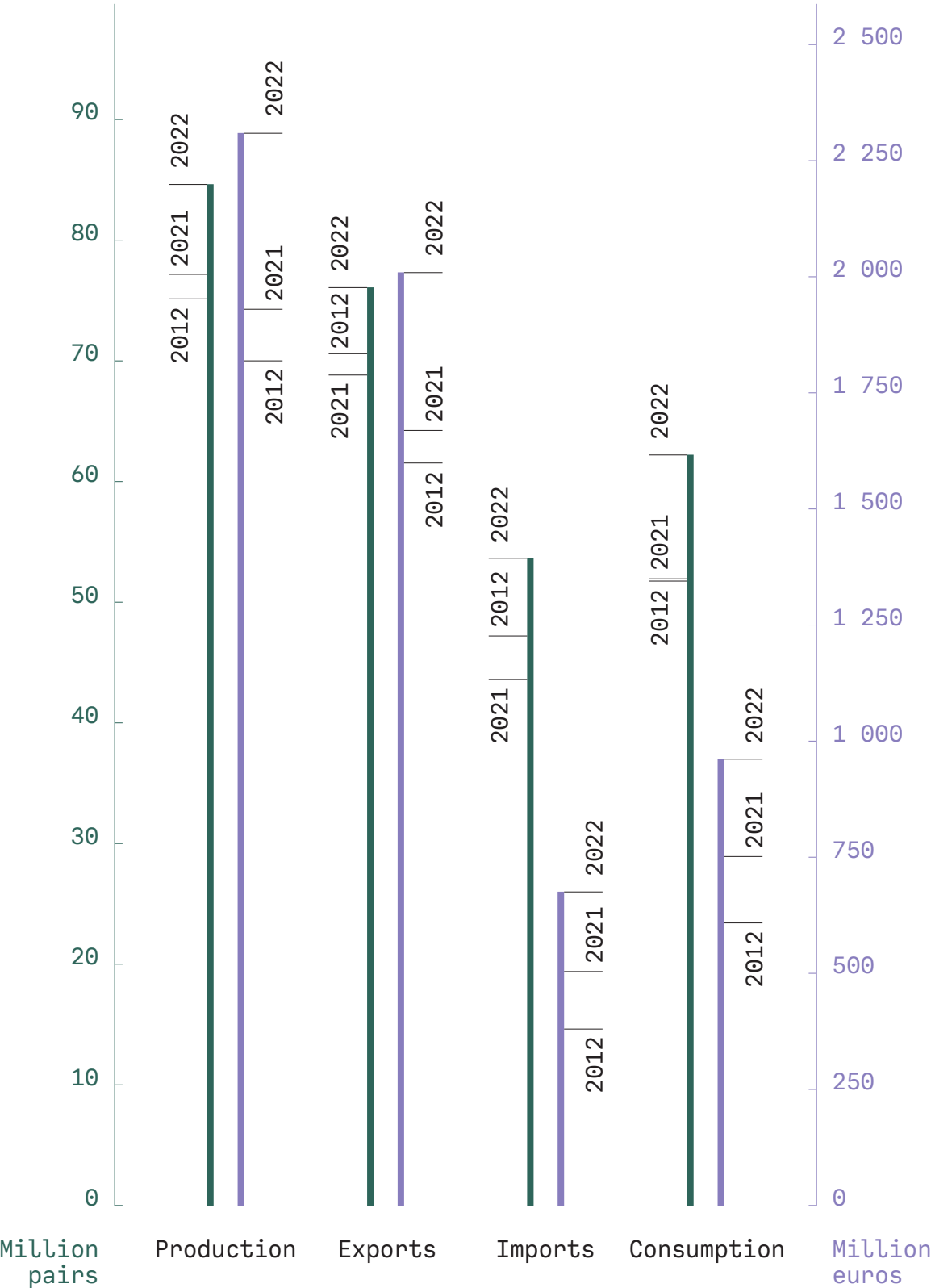


In 2022, the Portuguese footwear industry reached new records of production (€2.3 billion) and exports (more than €2 billion). Exports accounted for more than 90% of production, reflecting the industry's strong focus on the international markets.

Portuguese footwear exports experienced a remarkable increase of 20,2% from the previous year, and a 12,6% growth compared to pre-pandemic levels (2019). Over the past decade, the export's growth has exceeded 25%, driven by the high value of Portuguese footwear. During this period, the average export price of Portuguese footwear increased by 13,8%, to €26,40 per pair, while quantity exported grew by 7,8%.

Portuguese Footwear Industry

Source: APICCAPS/INE





Portuguese footwear exports are primarily destined for the European Union (EU) markets, which account for 80% of the total. Germany is the largest destination market, accounting for 21,6% of exports. France, the Netherlands, and Spain follow closely. The United States is the most important non-European market, representing 5,7% of total exports.

Portugal has a strong specialization in leather footwear, which accounts for 86,2% of its footwear exports. Among leather footwear, ladies' shoes are the most important product, representing 41,1% of total exports.

In 2022, the footwear components and leather goods industries also experienced significant growth. Footwear components' exports increased by 30%, while the leather goods exports' grew by 37%. Soles and heels account for half of the total footwear components exports, with uppers representing no more than 14%. The EU is the destination for 77% of Portuguese footwear components' exports, with Germany being the largest market, followed by France and Spain. Australia is the most important non-European market (4,8%). Leather goods exports

reached €273 million in 2022, with bags and purses accounting for half of this total. Three-quarters of total exports of Portuguese leather goods are destined to EU member countries.

France and Spain are the most important markets, while the United States is the most important non-European market, representing 4,8% of total exports. Overall, the footwear, footwear components, and leather goods industries in Portugal continue to demonstrate strong growth and a competitive edge in the international markets.

Europe is the most relevant market for the Portuguese Footwear Industry, specially countries like Germany, France or The Netherlands. However, the US is the market where Portuguese footwear is expanding the most.

Main Markets 2022

COUNTRY	MILLION PAIRS	MILLION EUROS
Germany	16.75	433.58
France	11.93	384.16
The Netherlands	9.58	306.67
Spain	10.44	150.59
United Kingdom	3.81	126.71
United States	2.81	114.04
Denmark	3.12	93.51
Sweden	1.54	62.54
Italy	5.53	51.17
Belgium	1.98	42.01



A new «strategic shock»

In addition to the strong performance in the external markets, 2022 was also the year when the Portuguese footwear Cluster presented its Strategic Plan 2030. The document recognizes the evolution of consumer preferences, the digitalization of distribution channels, and the emergence of new competitors as three fundamental drivers of the evolution in the international footwear markets and of the challenges to be addressed in the coming years. The Cluster is responding to these challenges through an action plan centered on four pillars:

- Qualification of people and companies
- Sustainable products and processes
- Flexibility and rapid response
- Active presence in the markets

While all four pillars are essential, sustainability is of particular significance. The footwear Cluster is investing 80 million euros in its largest collective investment project ever, the BioShoes4All project, which involves 70 partners and aims to be a global reference in developing sustainable solutions for the footwear industry. The project focuses on five pillars: biomaterials, ecological footwear, circular economy, advanced production technologies, and training and promotion.

“To be the international benchmark of the footwear industry and reinforce the Portuguese exports, combining successfully sophistication and creativity with productive efficiency, based on technological development and management of the international value chain, thus ensuring the future of a national productive basis, sustainable and highly competitive”. This is the vision of the Portuguese footwear Cluster for 2030.



Portuguese footwear industry to invest 50 million euros to be the most modern in the world

The Portuguese footwear industry aims to “become an international benchmark and strengthen its exports, combining virtuously sophistication and creativity with productive efficiency, based on the technological development and management of the international value chain, thus ensuring the future of a national production basis, sustainable, and highly competitive”. This is the vision outlined in the Strategic Plan of the Footwear Cluster 2030. To that end, the Cluster brought together 45 partners and, in a project coordinated by the Portuguese Footwear Technological Centre (CTCP), is developing the intelligent factory of the future.

The FAIST project — Agile, Intelligent, Sustainable and Technological Factory — involves an investment of 50 million euros, under the Recovery and Resiliency Plan (RRP), in the field of Mobilization Agendas, and “has as its main goal to provide and empower this industry with innovative technologies,

processes and sustainable materials, increasing the responsiveness to market demands and continuing making the Portuguese footwear and leather goods industry the most modern in the world”, said Florbela Silva, coordinator of the project.

The consortium led by the company Carité and technically coordinated by CTCP consists of 44 co-promoters, including 14 footwear and leather goods companies, 9 component companies, 15 companies of technological basis and 6 entities from the scientific and technological interface.

Within the scope of innovation, Florbela Silva recalls that underway is “the modernization of processes and new products to make the Portuguese industry more agile and competitive, the most modern in the world”. For this, the sector will invest “in the development of robotized and automated production processes, management software and production control, in parallel with

the development and production of new types of ecological and sustainable products”.

This way, it will be possible for Portuguese footwear Cluster companies to expand their range of products. On the other hand, to optimise production efficiency, the sector “ought to increase its degree of specialization, reducing the waste of energy and resources with an indispensable greater qualification and training of human resources”. At last, the dissemination of these technologies throughout the sector will be ensured by a structured and innovative communication programme, allowing it to achieve international scale.

One of the most critical areas, is the attraction of technology-based companies, with tradition and experience in other industries, to develop new equipment and induce disruptive industrial processes, more efficient and with increased production capacity. Therefore, the FAIST Agenda will invest in the Portuguese companies’ capability to produce equipment goods and foster innovative processes, thus reducing the share of imports of these technologies and increasing opportunities for the

national industry with an impact on the growth of skilled jobs.

In the view of Florbela Silva, the “implementation of this project will significantly boost the Portuguese footwear Cluster, increasing its degree of specialization both in new products, as in equipment goods and processes”. As a result, “important increases in the agility of response to markets and sustainability will be achieved, supported by technology and intelligence, with high differentiation and international projection”.



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