

FRESH



NEWS

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HAVEN'T YOU BOUGHT "MADE IN PORTUGAL"
FOOTWEAR, YET? WE'LL TELL YOU
WHY YOU SHOULD.

PORTUGUESE FOOTWEAR: THE RIGHT CHOICE

Portuguese shoes have already conquered their place in the global market. Design, quality, innovation and differentiation have consolidated the "made in Portugal" label. Could you live without a pair of Portuguese shoes? You could, but it wouldn't be the same.

If there's one thing the Portuguese can do well, it's shoes! And if we combine the know-how, history and tradition to the fact that Forbes magazine has considered Portugal among the 20 safest countries in the world, with a great "talent reservoir", then we have all the ingredients that make our country one of the best places to produce and sell shoes.

Every year, over 80 million "made in Portugal" pairs of shoes are exported to 163 throughout the five continents. The sector has conquered

the global market, establishing itself as the "sexiest industry in Europe" with its design, quality, innovation and, above all, know-how due to the history of the Portuguese crafts talent, the quality of the raw materials and advanced techniques. Currently, the Portuguese footwear industry is quite likely the most modern in the production of high-end fashion articles.

If you don't yet own a pair of Portuguese shoes, you have no idea what you're missing out on. By having one, you'd also be more eco-friendly, since there are already several sustainable offers on the market, from innovative materials to traditional ones, such as leather with the guarantee of sustainable origins. The Action Plan of the Footwear Cluster for Sustainability aims to make the Portuguese footwear industry leader in terms of developing sustainable solutions, therefore, the last APICCAPS' campaign, We are the FOOTure, is a tribute to the Portuguese roots and the sector's ability to innovate itself, this time by embracing challenges related to environmental issues. Planet, People and Companies, are the three main axes of the action plan, which envision the implementation of 12 measures and 50 initiatives for the companies to adopt and make their standard production processes more sustainable.

Just in time

It's becoming difficult to find excuses to not buy Portuguese footwear. Even more when big multinationals seek "Made in Portugal" with their orders, that then go to the global market. To earn even greater customer loyalty from its clients, the Portuguese industry distinguishes itself with

the "just in time" response capability. Through the investment in technology, productivity and competitiveness, it was able to improve its flexibility and quick response capability, establishing a new flow paradigm of small orders, quickly dispatched to small distributors and retail. The Portuguese footwear industry responds quickly and effectively.

The cluster of international dimensions, mainly located in the Northern Portugal, also contributed to this. 1800 footwear companies are based in cities such as Vila Nova de Gaia, Guimarães, Felgueiras, Oliveira de Azeméis, Santa Maria da Feira and São João da Madeira, as well as tannery, components and advanced technology. Overall, the national footwear cluster benefits from the country's privileged geographic location, with excellent communication channels and quick access to the center of Europe, ports and airports, which offer easy reach to the five continents.

And, if you want to combine business and pleasure, making business in Portugal will allow you to enjoy a country known for its sunny weather, beaches, mountains, castles and monasteries. As well as its olive oil and internationally renowned wine, irresistible regional sweets and high-quality fish and meat dishes. If buying Portuguese shoes is the best choice, then using them to explore the world's wonders will be, most definitely, unforgettable.

The "sexiest industry in Europe", "made in Portugal", is indeed a quality symbol full of personality and style, making Portugal a rich source of brands that conquer customer loyalty and passion.

Could you live without a pair of Portuguese shoes? You could, but it wouldn't be the same.

SUSTAINABILITY: A TREND THAT HAS COME TO STAY

Portuguese companies are aware of sustainability concerns and one can already find several good examples of innovative processes in the materials' industry. Already thinking ahead, Portugal aims to be a worldwide leader in the development of sustainable solution within the footwear sector.



Advocate for animals' well-being. Fight against plastic. Reduce waste. Promote recycling. Decrease the carbon footprint... Is it possible to fulfill all these social and environmental responsibilities without compromising comfort, esthetics and design in a pair of shoes? The answer is: yes! According to the Action Plan of the Footwear Cluster for Sustainability, a partnership between APICCAPS and the Footwear Technology Centre of Portugal, it is possible through three main axes: Planet; People; and Companies.

So yes, it is possible to produce a pair of shoes while thinking about sustainability, the clients and without compromising the business, and that's why sustainability is becoming more than just a trend and will definitely not stop being fashionable, because it truly touches both companies and consumers.

Therefore, environmental issues are making a great difference in the Portuguese footwear industry. Sustainable footwear brands are currently being more sought-after than ever before. A study from Nielson Global has concluded that 66% of consumers are available for paying more for a sustainable product and, according to the trend,

this percentage is expected to increase in the next few years.

While national companies are adapting themselves to new challenges, the Action Plan of the Footwear Cluster, composed of 12 measures and 50 actions, aims to make the Portuguese footwear industry the worldwide leader in the development of sustainable solutions. The sophistication and creativity of the Portuguese offer, regarding materials, products, productive processes and business models, will allow the reach of market segments that are more focused on fashion and technicality than price.

In partnership with several Research & Development institutions, there are already some undergoing studies about new products and technologies, from modelling tools that allow the creations of products that will improve the quality of life of the costumers, solutions for the use of recycled materials and even the creation of collaborative platforms and advanced solutions to monitor the digital presence of the sector.

Following modernity

This is the new paradigm of the Portuguese footwear companies, that have been innovating their products, materials and components by implementing new processes and equipment, without ever jeopardizing design. Nowadays, there are several brands in the market with 100% vegan, biodegradable footwear made using recycled plastic, or by simply using leather, as the only raw material, showing that the footwear industry can be a showcase for the reduction, reuse and recycling of waste and materials.

Within the domain of the circular economy, the Portuguese Leather Goods campaign follows modernity. Without excluding its origins – leather is the oldest and most traditional material in the footwear industry –, the Footwear Cluster is aware of its social and environmental responsibility. Therefore, the sector is reinventing itself, while taking in consideration the animals' well-being and the products' traceability.

Studies have shown that, with the increasing worldwide meat consumption, if the skin of the animals weren't turned into leather, we would face the problem of having an estimated 10 million tons of skin waste per year. This means that refusing the use of leather can be interpreted as supporting environmental pollution.

In contrast, buying a pair of leather shoes can be interpreted as supporting recycling.

This reality doesn't mean there's no consciousness about the animals' well-being since the animal is not killed for its skin. Besides that, with the technological evolution of the manufacturing processes and rigorous waste management actions, the leather had to fulfill strict environmental standards of "responsible origin". Durability and resistance are two main added values of the leather footwear. Investing in natural leather shoes is investing in a product that will last considerably longer since its lifecycle will be much higher than other materials. Also, leather is not easily torn, is warm, liquid proof and cushions the fall of small objects, which makes it very resistant.

While this new global scenario provides several business opportunities, companies' responsibilities are also increasing, and that is exactly where this new Portuguese footwear industrial era positions itself, once again, at the forefront by assuming itself as the showcase for change and contributing to the sustainable development of both the community and the environment.

FOOTWEAR INDUSTRY LAUNCHES ACTION PLAN FOR SUSTAINABILITY



APICCAPS (Portuguese Footwear, Components, Leather Goods Manufacturer Association) presented on 5 December at LIPOR their Action Plan for the Footwear Cluster for Sustainability. The presentation happened under the conference Sustainability: challenges and opportunities, attended by Inês dos Santos Costa, Secretary of State for the Environment, and João Torres, State Secretary for Trade, Services and Consumer Protection.

According to Luís Onofre, APICCAPS President, “this is a unique document for the Portuguese economy that aims to create a structured sectorial mindset, to address the several domains of sustainability in an integrated manner”. Under the coordination of both APICCAPS and CTCP (Footwear Technology Centre of Portugal), “this document will be a key tool for the strategic repositioning of the sector within the international competitive scenario”, states the President.

The Action Plan is divided into three axes (Planet, People and Companies) and presents 12 measures, distributed over 50 actions. “Our goal is for the Portuguese footwear industry to be a leader in the development of sustainable solutions”. The development of new materials, tracking raw materials, product information, product environmental footprint or energy efficiency are some of the actions included.

The Portuguese footwear industry plays an important role in the Portuguese economy, namely concerning exports. In effect, the Portuguese footwear exports amount to 1.9 billion euros, which represents 95% of overall production. Moreover, the national added value is significantly high and the sector is responsible for a positive Portuguese trade balance of over 1.3 billion euros.

This outcome was only possible due to a successful combination of entrepreneurial dynamism and public policies that, together, act upon the three main factors for the maintenance and reinforcement of competitiveness: sales promotion and marketing; human resource qualification; and innovation. In the latter, Portugal has become the main user of innovative technologies within the footwear sector.

WHERE DOES LEATHER COME FROM?

What is the true origin of the leather?
What's its use? The ecological responsibility adverbs
not always answer these questions clearly.
Is animal exploitation uniquely destined to the
production of fashion products or is the fashion
industry just recycling waste? "A Future for
European Leather!" is a manifesto from the
European leather industry – COTANCE – and has
the goal of promoting a new way of thinking
regarding the origin and treatment of the leather
and demystify concepts. This a story written by the
leather industry itself.

'WHERE DOES LEATHER COME FROM?' IS A GREAT QUESTION!

Over Christmas, my 16-year-old niece asked for a new jacket, to go to college. As you probably know that it is impossible to buy clothes for teenagers, so she was given the money to go and buy one. When I asked what kind of jacket, she said she would buy a synthetic one because, - and I quote - "poor animals" if she purchased a leather garment, referring to the animals which she thought were bred and killed for their skins or hides. The younger generation, who embrace the importance of recycling in their everyday life, somehow do not understand that leather is the oldest example of recycling on record.

So why does leather have such a negative image with the younger generation? What are we and our fashion partners not doing right? So, I opted to explain where leather comes from and to discuss with her the misconceptions or fallacies that I have heard so often. In short, I gave her a quick overview of how leather came to exist and why it remains relevant today.



- It is one of the oldest crafts known to mankind. 170,000 years ago, our hominid ancestors used the skins of the animals they hunted to protect themselves from the weather, as totems or amulets, for rudimentary musical instruments and even to carry their belongings whilst they roamed the lands. They learned to prevent them from rotting by tanning them, and over the centuries, the use of tanned skins and hides has evolved into a well-respected industry. Tanneries are key in this recycling chain, converting a waste product of the meat industry into a valuable material that generates jobs and wealth, in particular for local economies.
- Are furs also considered leather? No, but due to a lack of understanding, a lot of confusion arises. Furs are not by-products of the food industry; fur animals are primarily farmed for their pelts. Animal activist groups gain from this confusion and sometimes promote it. Sadly, misinformation is not something that we can control, and it is not unusual for consumers to believe that furs and leather are one and the same thing.
- Are more animals bred and slaughtered due to the tanning industry? No. The tanning industry relies almost exclusively on the meat industry. As a matter of fact, statistics show that as people in developing nations are becoming wealthier, they are eating more animal protein (meat) and thus there are more skins and hides produced. With the exception of a small amount of exotic leather, all skins and hides processed in Europe come from the food industry.
- Does the EU leather industry slaughter animals for their skin? No. Nearly 100 per cent of the skins and hides processed by European tanneries are by-products of the food industry. If the tanning industry did not exist, the food industry would have to dispose of them. There are really just two alternatives for this, both highly polluting: landfill or incineration. By making leather, these hides and skins are transformed into a highly versatile and natural product for fashion garments, footwear, upholstery and even safety garments for fire-fighters and race-drivers.
- The tanning industry pollutes rivers, contaminates the atmosphere and is more dangerous to the environment than fossil fuel products, such as synthetic materials. Not true. In the past, as in most industries, concepts such as environmental protection or sustainability were not a business priority. Things have changed! Fortunately, greater awareness of the importance of environmental sustainability are now at the top of the agenda for most nations. As for all industries, there is always room for improvement, but great steps in technology, knowledge-sharing, investment in R&D and strict environmental policies have aided tanneries in the EU to become world leaders in terms of eco-friendliness and sustainability.
- There is a lot of media coverage regarding animal cruelty at abattoirs. It is true that recently we have seen media coverage about animal abuse in different slaughterhouses throughout Europe. These unfortunate events are isolated incidents and strongly condemned by all the European Tanning associations, their members, COTANCE along with society at large. Throughout Europe, slaughterhouses are regulated and there are laws against cruelty to animals. It is important to note that many tanneries put animal welfare at the forefront of their corporate sustainable philosophy.



DEAR NIECE,

Leather is a strong, durable, versatile product which, thanks to sustainable tanning processes, can be transformed into jackets, bags and shoes... Look around you.

After eating your roast beef for lunch, you are laying on a nice leather sofa that is 12 years old and still has a beautiful patina; the car you drove in has leather upholstery... You recycle your soda cans, plastic bottles, paper, so why not take one step further and think also about making your contribution to the recycling of hides and skins? Why not get a leather jacket designed and made in Europe with European leather? If you look after it well, your jacket will last for many years to come and get better every time you wear it.

WHAT DO YOU THINK ABOUT LEATHER NOW?



**MORE THAN
200 NEW
FOOTWEAR
BRANDS SINCE
2010**



The creation of own brands is one of the Portuguese footwear industry's main concerns. According to CTCP's (Technological Centre of Footwear of Portugal) GAPI (Offices for the Promotion of Industrial Property), 238 footwear brands were created in Portugal since 2010.

In 2018, for instance, 24 new brands were created. This data is gathered by GAPI, a CTCP structure created in partnership with INPI (Portuguese Institute of Industrial Property), dedicated to promoting Industrial Property (PI) in the footwear companies and which has the goal of reinforcing the companies' competitiveness through innovation and differentiation.

Of the 238 brands created in the past eight years, the majority, 178, were registered as collective. Of those, only 60 were registered in Portugal.

Strategic decision

The investment in own brands is a priority defined by the Strategic Plan FOOTure 2020. "Although the Portuguese footwear has gained reputation, the cluster's reality in this matter is still very diverse. What needs to be done is mobilize the skills that have been used to build the collective image in favor of the companies. Companies should be assisted in the development of image campaigns and customized communication plans, in the hiring of communication agencies, in the participation in showrooms abroad, etc. They also should be assisted in the improvement of its internal image, which is essential to the relationship with the buyers that visit them. In some cases, the creation of own brands will be the culmination of all these actions", as it says in the document.

Increasing support to the brands

Since last year, over 60 footwear companies have already resorted to support regarding "Valorização de Oferta" (Marketing and Communication Improvement), a project promoted by APICCAPS with the support of the Program COMPETE 2020.

Throughout the years, APICCAPS has been developing intense activity to support the internationalization of the Portuguese footwear companies, especially regarding attending international trade fairs and exhibitions and, more recently, the image promotion campaign Portuguese Shoes. Since the beginning of 2015, the companies benefit, through APICCAPS, from support for the promotion of own brands and, more recently, to implement digital marketing campaigns. These supports are within the ongoing communication campaign and have the backing of the Program COMPETE 2020.

Support is to be given in several areas, from companies' strategic diagnosis to communication plans, investment in marketing and hiring communication consultancy in several markets (Germany, Spain, France, Netherlands, UK, Italy, USA) or catalog production (including the design, graphical editing and release of the sector companies' collections catalog, which can be used by the companies as communication with their clients and as a support in their participation in international fairs).

Naturally, these supports extend to trademarks and patents conception and registration, as well as the production and creation of photographic and media contents, which are essential in promoting both to professionals and the

end consumer. In this matter, the hiring of photographers, stylists, hairdressers, makeup artists, mannequins, video production teams is envisaged, among others, capable of creating great multimedia content that can be used in the several communication means used by the brands.

In the digital universe, in addition to assistance to digital marketing campaigns, there are also investments envisaged for the creation of websites and e-commerces.

This year alone, there will be a two million euro investment in own brands.

PORTUGUESE FOOTWEAR IN NUMBERS

1 378

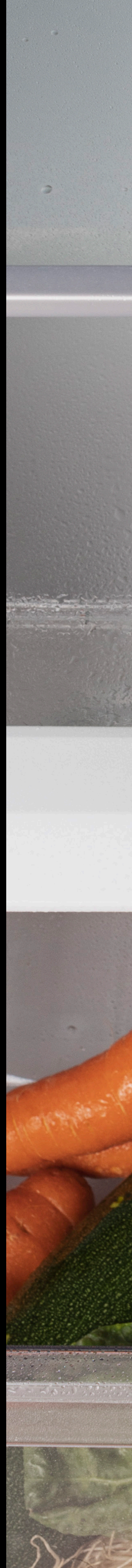
The number of footwear companies in Portugal, by the end of 2019, according to APICCAPS' Studies Office. Since 2009, 280 new companies were created (over 14%).

36 614

The number of workers within the Portuguese footwear sector. In the last decade, employment has increased 13% to 36 614.

76 124 956

The number of pairs of shoes exported by Portugal, in 2019. Portugal exports more than 95% of the production to 163 countries, in all continents.





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