

WORLD FOOT WEAR 2022 YEAR BOOK

**SAMPLE
REPORT**



WORLD FOOTWEAR
by Portuguese Shoes

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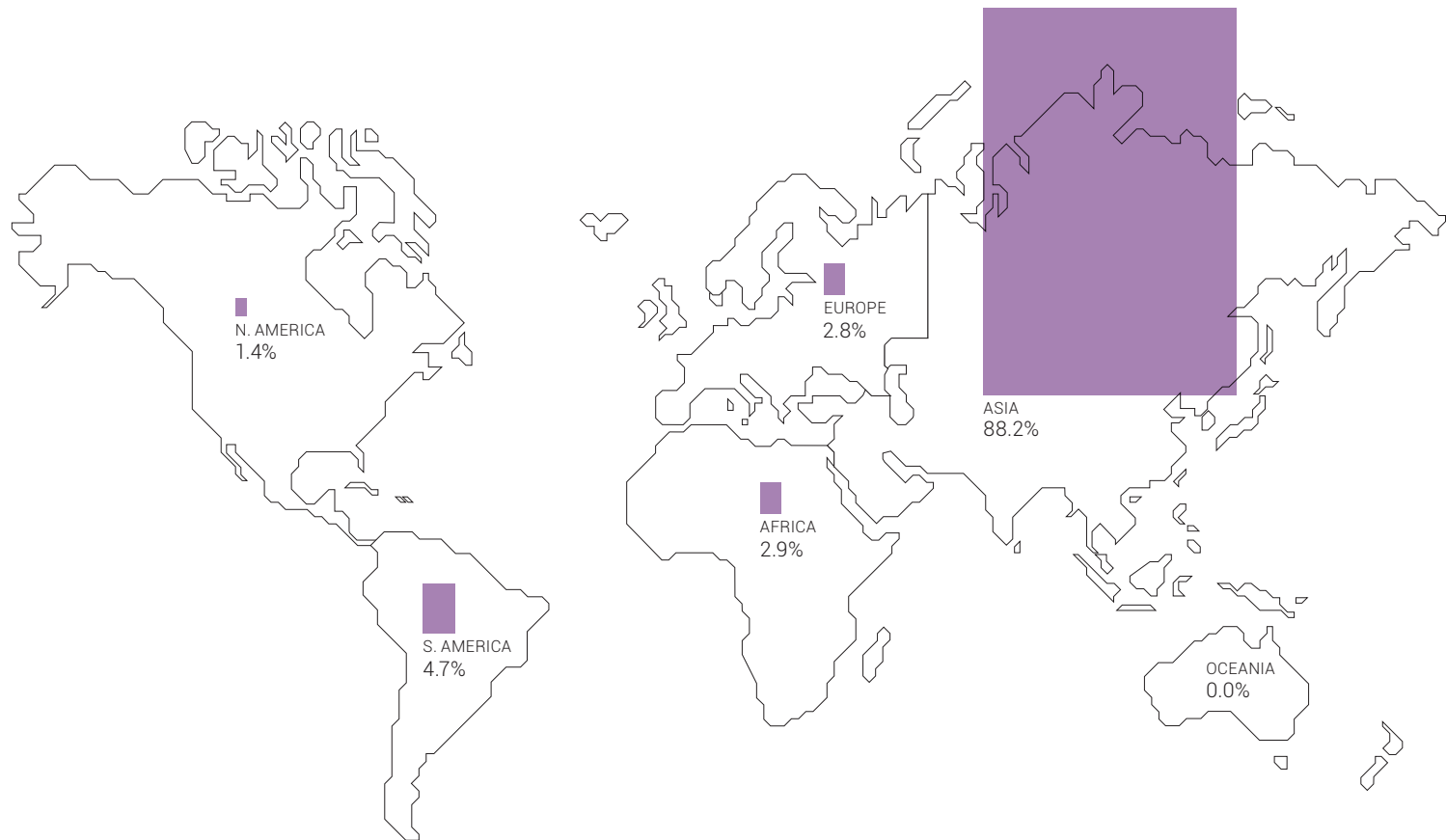
APICCAPS 2022

Detailed terms at www.worldfootwear.com

CONTENTS

WORLD FOOTWEAR 2021	7
DYNAMICS OF INTERNATIONAL TRADE	15
GEOGRAPHIC PATTERNS	19
PRODUCT MIX	25
THE BIG PLAYERS	29
TOP 5 EXPORTERS BY CONTINENT	35
TOP 10 EXPORTERS BY PRODUCT TYPE	41
COUNTRY PROFILES	47
WORLD DATA MAP	135

PRODUCTION



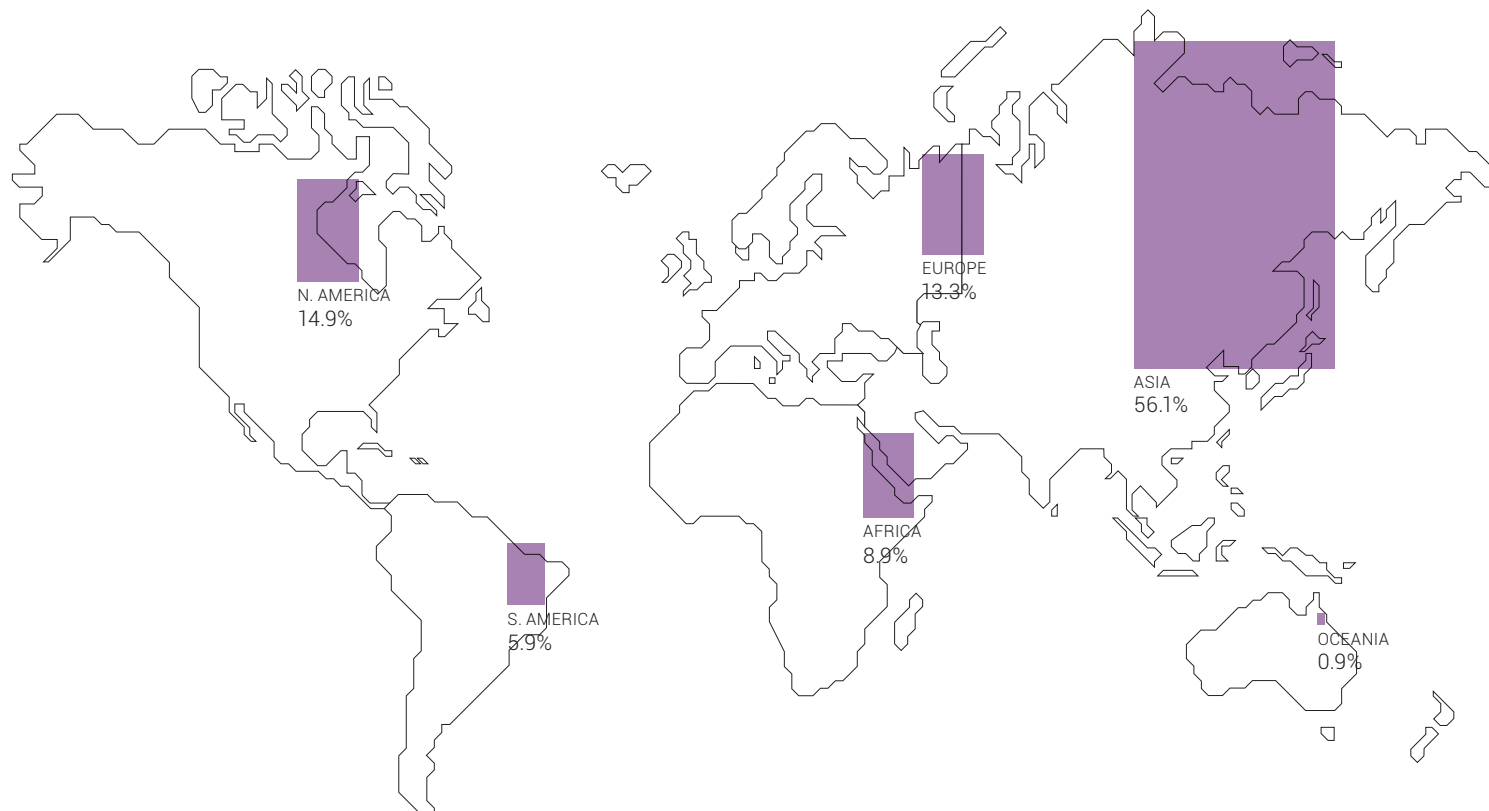
Map 1 – Distribution of Footwear Production by Continent (Quantity) 2021

Although the COVID-19 pandemic still limited manufacturing in some countries, in 2021 global footwear production increased by 8.6%, exceeding 22 billion pairs. Nonetheless, production is still 2 billion pairs below the pre-pandemic level. At a broad, continental level, the pandemic did not interrupt the trend towards geographic concentration of footwear

manufacturing. Asia now accounts for more than 88% of the world's production, an increase of more than half of a percentage point than in the previous year. Moving in the opposite direction, Europe's share dropped below 3%, as also happened with Africa's. South America slightly increased its share and is the main location of production outside Asia.

+8.6% pairs of shoes produced in 2021

CONSUMPTION

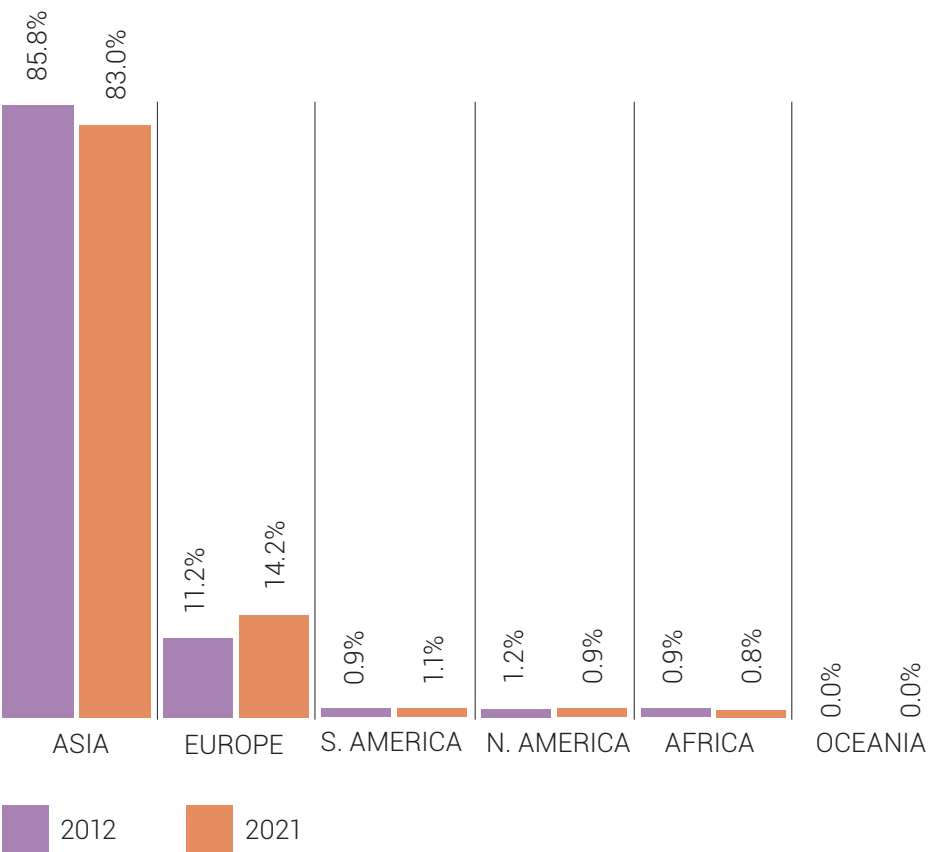


Map 2 — Distribution of Footwear Consumption by Continent (Quantity) 2021

In 2021 footwear consumption bounced back strongly in North America: consumption per capita reached the 5 pairs threshold, only slightly below its pre-pandemic level. In Europe the recovery was much weaker, with consumption per capita increasing by only 0.3 pairs and remaining far from the 4.4 pairs achieved in 2019. Consumption per capita in Asia increased by the same amount, 0.3 pairs, but this was enough to bring it back to the pre-pandemic level. Given the continent's

huge population, Asia's share of footwear consumption worldwide reached a new peak of 56.1%. North America overtook Europe in 2nd position, although not by a large margin. South America and Oceania also gained some share over the previous year, but consumption in Africa has yet to recover from the effects of the pandemic.

Footwear consumption in the USA bounced back strongly in 2021



2012 2021

Chart 3 – Distribution of Footwear Exports by Continent of Origin (Quantity) 2012-2021

China leads the table of the world's footwear exporters by a very wide margin but, for more than a decade, it has been slowly losing market share to other Asian countries. Vietnam is the greatest success story of the footwear industry in the last ten years and now represents roughly 10% of world exports, putting it comfortably in 2nd position in this table. Recently Turkey has also made considerable progress and, since 2017, has climbed from 8th to 4th position with 3rd position not being beyond reach. Germany remains Europe's largest footwear exporter ahead of Belgium, Italy and the Netherlands. In 2021, Cambodia reclaimed the 10th position that it had lost to Spain in the previous year.

RANK	COUNTRY	PAIRS (MILLIONS)	WORLD SHARE
1	CHINA	7 887	60.4%
2	VIETNAM	1 294	9.9%
3	INDONESIA	427	3.3%
4	TURKEY	349	2.7%
5	GERMANY	325	2.5%
6	INDIA	243	1.9%
7	BELGIUM	215	1.6%
8	ITALY	202	1.5%
9	NETHERLANDS	177	1.4%
10	CAMBODIA	163	1.2%

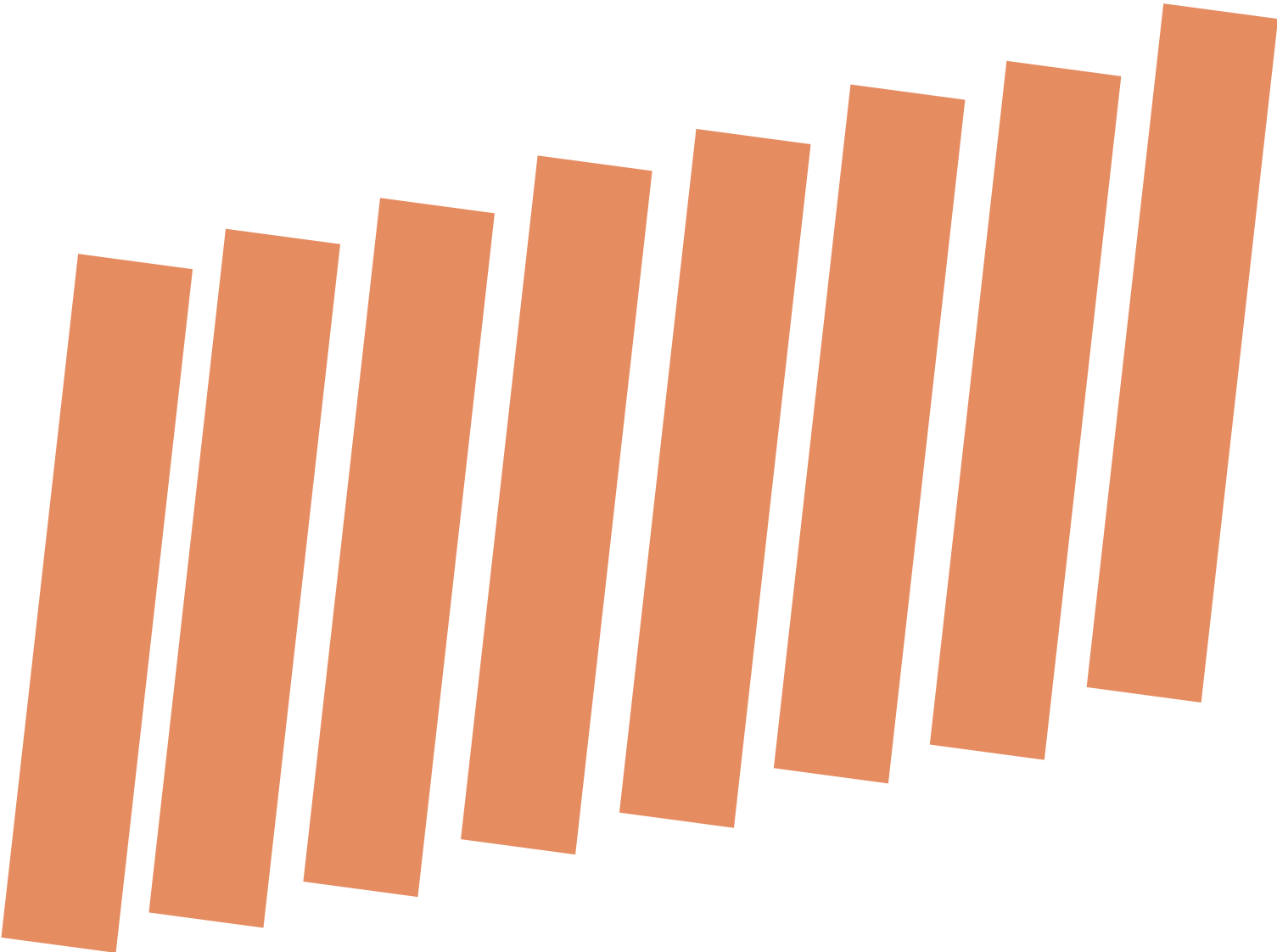
Table 3 – Top 10 Footwear Exporters (Quantity) 2021

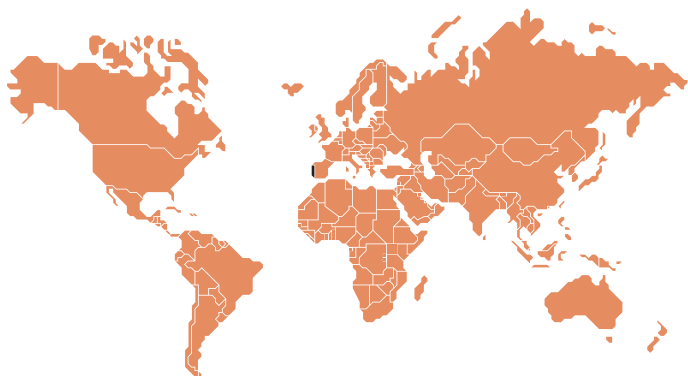
EXPORTS

58.8% of the footwear produced worldwide in 2021 was exported, the lowest percentage in a decade, signalling the reconfiguration of international value chains resulting from the COVID-19 pandemic and other international tensions. However, the general pattern for the geographic origin of footwear exports did not change in the last decade: Asia is the origin of more than 4 out of every 5 pairs of shoes exported, with Europe in a very distant 2nd place and other continents making small contributions to the world total. Nonetheless, Europe increased its share by 3 percentage points, mostly at the expense of Asia.

58.8% of footwear production is exported

COUNTRY PROFILES



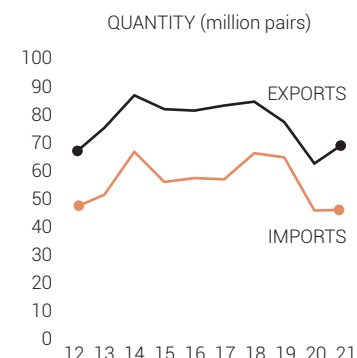


PORTUGAL

CAPITAL	Lisbon	LANGUAGE	Portuguese
AREA (Km ²)	92 226	CURRENCY	Euro
POPULATION	10 million		
GDP PER CAPITA	24 264 USD	GDP 2021	250 billion USD
Δ GDP 2021	4.9%	Δ GDP Last 5 Years	5.0%

FOOTWEAR INDUSTRY

	VALUE		QUANTITY		PRICE
	Million USD	World Rank	Million Pairs	World Rank	USD
EXPORTS	1 981	13	69	19	\$28.60
IMPORTS	622	39	45	54	\$13.73
PRODUCTION			76	19	
CONSUMPTION			52	52	

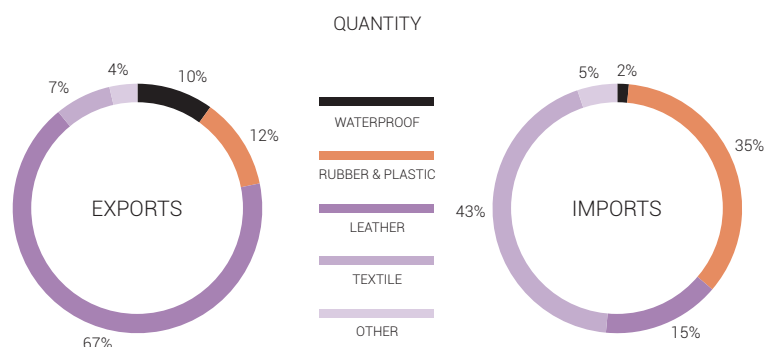


MAIN TRADING PARTNERS

EXPORT MARKETS	Million USD	Value Share	Million Pairs	Quantity Share	LAST 5 YEARS VARIATION	Million USD
Germany	460	23%	16.7	24%	+ Germany	23%
France	395	20%	11.3	16%	- Belgium	-37%
Netherlands	292	15%	8.9	13%	- U. Kingdom	-17%
Spain	154	8%	9.1	13%	- Spain	-25%
U. Kingdom	122	6%	4.2	6%	- France	-15%

IMPORT MARKETS	Million USD	Value Share	Million Pairs	Quantity Share	LAST 5 YEARS VARIATION	Million USD
Spain	241	39%	18.2	40%	+ Germany	43%
France	64	10%	4.8	11%	+ France	17%
Belgium	63	10%	1.9	4%	- Italy	-25%
Germany	60	10%	3.3	7%	- Netherlands	-30%
China	59	10%	12.1	27%	- Spain	-16%

TYPES OF FOOTWEAR TRADED



RECENT DEVELOPMENTS

Portugal is the 9th biggest exporter of leather footwear worldwide and is ranked among the world's top 20 leading footwear exporters. Portuguese exports recovered in 2021 and have their main markets in Germany, France and other European countries. Imports remained stable last year. Spain is the main source of Portuguese imports.

MAIN PLAYERS

	TURNOVER (million USD)	EMPLOYEES
ECCO'Let (Portugal) - Fábrica De Sapatos, Lda	93.3	1 144
Gabor Portugal - Indústria De Calçado, Lda	74.8	1 252
Sopropé - Organizações De Calçado, S.A.	57.9	587
Ara Shoes Portuguesa, Unipessoal, Lda	38.2	658
Rodiro - Fábrica De Calçado, S.A.	35.6	398

SECTORIAL ORGANIZATIONS

APICCAPS - Portuguese Footwear, Components and Leather Goods Manufacturers' Association | www.apiccaps.pt
CTCP - Portuguese Footwear Technological Centre | www.ctcp.pt

FAIRS & EVENTS

n.a.

COUNTRY	CONTINENT	COUNTRY	CONTINENT
Albania	Europe	Korea, Republic	Asia
Algeria	Africa	Latvia	Europe
Argentina	South America	Lithuania	Europe
Australia	Oceania	Luxembourg	Europe
Austria	Europe	Malaysia	Asia
Bangladesh	Asia	Mexico	North America
Belarus	Europe	Morocco	Africa
Belgium	Europe	Myanmar	Asia
Bosnia Herzegovina	Europe	Netherlands	Europe
Brazil	South America	New Zealand	Oceania
Bulgaria	Europe	Nigeria	Africa
Cambodia	Asia	North Macedonia	Europe
Canada	North America	Norway	Europe
Chile	South America	Pakistan	Asia
China	Asia	Panama	North America
Colombia	South America	Paraguay	South America
Croatia	Europe	Peru	South America
Czechia	Europe	Philippines	Asia
Denmark	Europe	Poland	Europe
Dominican Rep.	North America	Portugal	Europe
Ecuador	South America	Romania	Europe
Egypt	Africa	Russian Fed.	Europe
El Salvador	North America	Saudi Arabia	Asia
Estonia	Europe	Serbia	Europe
Ethiopia	Africa	Singapore	Asia
Finland	Europe	Slovakia	Europe
France	Europe	Slovenia	Europe
Germany	Europe	South Africa	Africa
Greece	Europe	Spain	Europe
Guatemala	North America	Sweden	Europe
Hong Kong	Asia	Switzerland	Europe
Hungary	Europe	Thailand	Asia
India	Asia	Tunisia	Africa
Indonesia	Asia	Turkey	Asia
Iran	Asia	Ukraine	Europe
Iraq	Asia	U. Arab Emirates	Asia
Ireland	Europe	United Kingdom	Europe
Israel	Asia	United States	North America
Italy	Europe	Uzbekistan	Asia
Japan	Asia	Venezuela	South America
Kazakhstan	Asia	Vietnam	Asia
Kenya	Africa		

