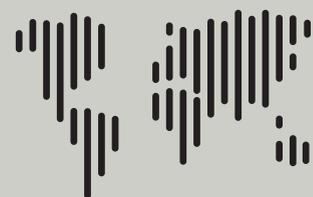


WORLD FOOTWEAR YEARBOOK 2023

**SAMPLE
REPORT**



WORLD FOOTWEAR
by Portuguese Shoes

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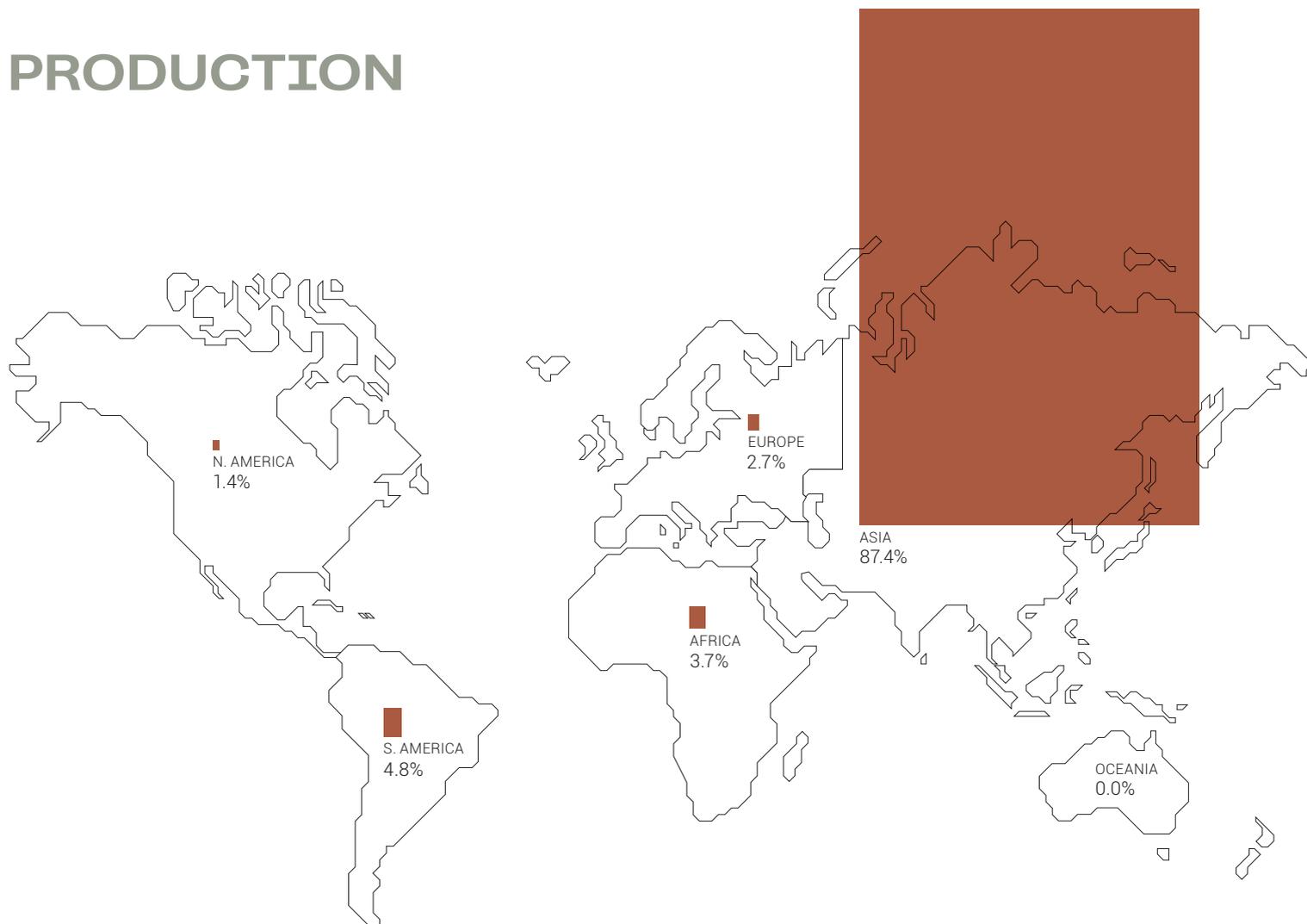
APICCAPS 2023

Detailed terms at www.worldfootwear.com

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PRODUCTION



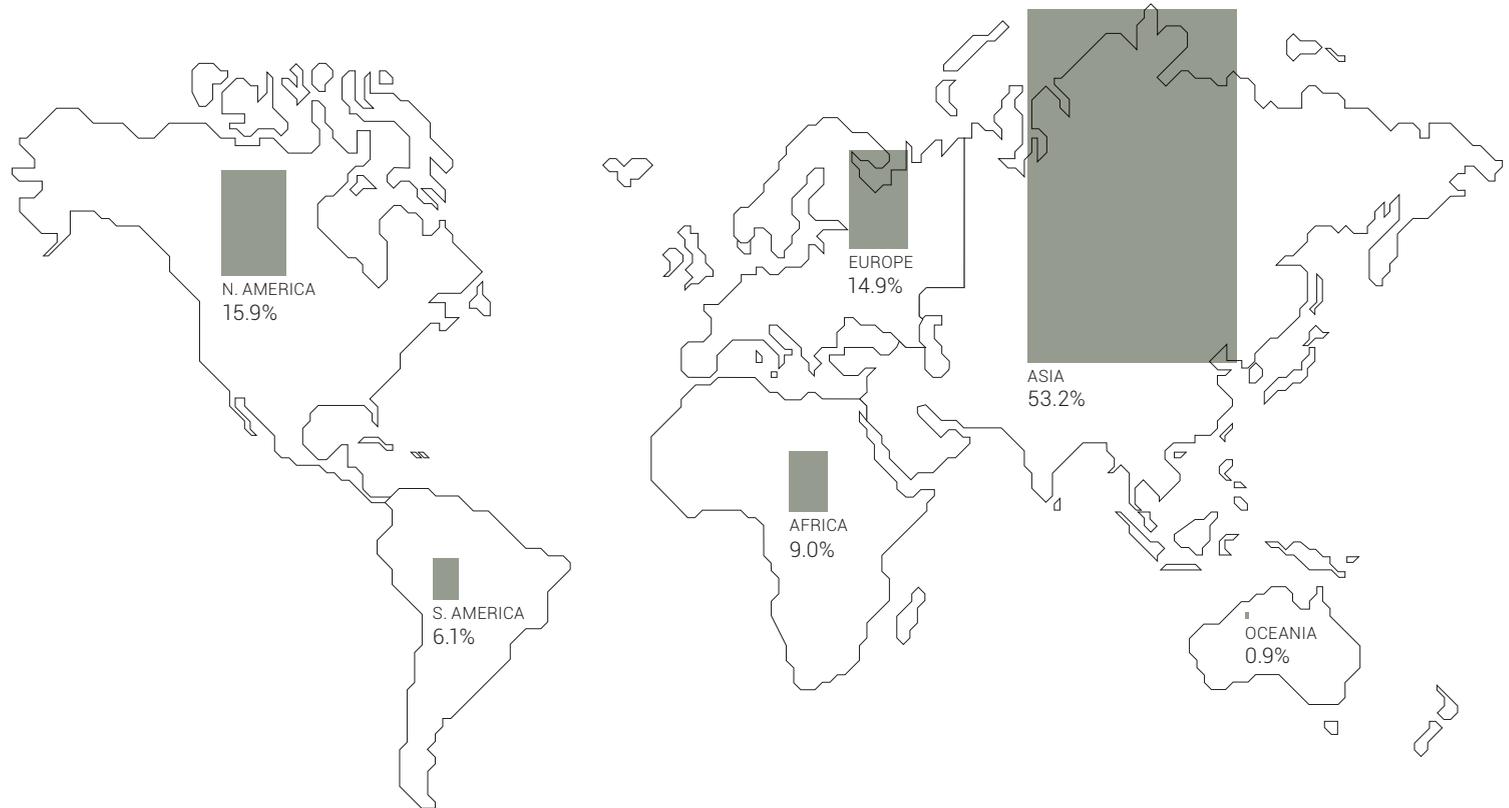
Map 1 — Distribution of Footwear Production by Continent (Quantity) 2022

In 2022, global footwear production reached 23.9 billion pairs, bouncing back to pre-pandemic levels. Overall, production increased by 7.6% compared to the previous year. However, Africa experienced double-digit growth, while Europe and Oceania saw limited growth at 3.5% and 2.7%, respectively.

Despite these varying growth rates, the geographical distribution of footwear production has remained relatively unchanged over the past decade when viewed at a continental level. Asia continues to dominate, manufacturing over 87% of the world's shoes, the same percentage as in 2010. South America follows as the second most significant location, but its global production share decreased from 6% to 4.8%. Europe and North America have also experienced a decline in their respective shares. Africa is the only continent that has gained in importance, albeit accounting for less than 4% of global production.

23.9 billion
pairs of shoes
produced in 2022

CONSUMPTION

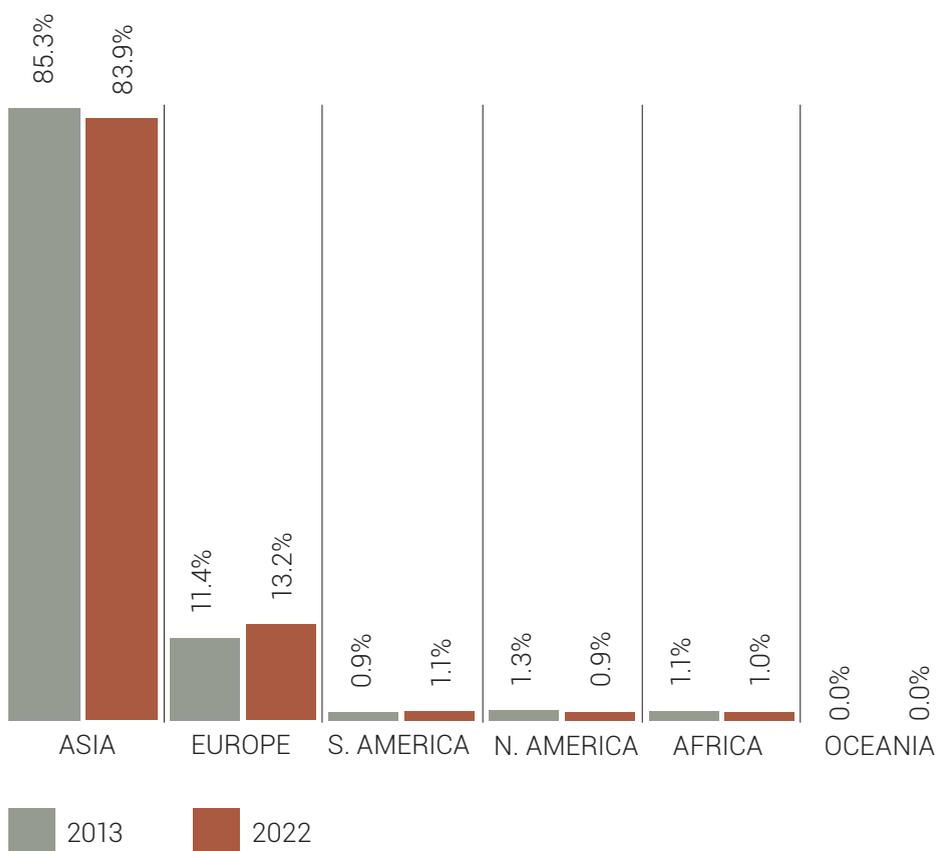


Map 2 — Distribution of Footwear Consumption by Continent (Quantity) 2022

Footwear consumption, driven by population and income, is more evenly distributed than production. Asia, home to almost 60% of the world's population, accounts for 53.2% of global footwear consumption, an increase from 49% as recorded in the first edition of this Yearbook in 2011. Africa's share of consumption has also been growing and currently stands at 9%, although it is considerably smaller than its share of the world population (18%). However, in

2022, consumption growth was highest among the wealthier regions of the world. North American and European shares of consumption (15.9% and 14.9% respectively) have increased, clearly in excess of their comparative demographics, owing to their higher average income levels. Our data reveal significant variations in *per capita* consumption worldwide, ranging from 1.4 pairs per person in Africa to 5.9 in North America.

5.9
pairs of shoes per
person in North
America



EXPORTS

Footwear exports recorded a notable increase of 9% in 2022, reaching a total of 15.2 billion pairs. The proportion of production exported also saw a rise, reaching its highest level in eight years of 62.8%. Although the majority of these exports originate from Asian countries, this percentage has slightly declined over the past decade: from 85.3% to 83.9%. Conversely, the share of exports from European countries has increased from 11.4% to 13.2%. Other continents' contributions to world exports remain relatively small, at 1% or less. Overall, at an aggregate level, the geographic pattern of footwear exports has remained largely unchanged in recent years.

61.3%
China's share in footwear exports

Chart 3 – Distribution of Footwear Exports by Continent of Origin (Quantity) 2013–2022

At the country level, the table of the top 10 footwear exporters remains unchanged when compared to 2022. These 10 countries collectively account for almost 90% of footwear exports. China stands out as the origin of over 60% of total exports. However, its share has declined by more than 10 percentage points over the last decade. Vietnam has emerged as the main beneficiary of this reduction, significantly increasing its own share from 2% to nearly 10%. Türkiye has also achieved a remarkable performance and now holds the 4th position among global exporters. Among European countries, Italy has dropped 4 positions and slightly reduced its share over the past 10 years, while Germany has nearly doubled its share and climbed two positions to secure 5th place.

RANK	COUNTRY	PAIRS (MILLIONS)	WORLD SHARE
1	CHINA	9 308	61.3%
2	VIETNAM	1 505	9.9%
3	INDONESIA	535	3.5%
4	TÜRKIYE	378	2.5%
5	GERMANY	378	2.5%
6	INDIA	285	1.9%
7	BELGIUM	242	1.6%
8	ITALY	216	1.4%
9	NETHERLANDS	206	1.4%
10	CAMBODIA	190	1.3%

Table 3 – Top 10 Footwear Exporters (Quantity) 2022

COUNTRY PROFILES

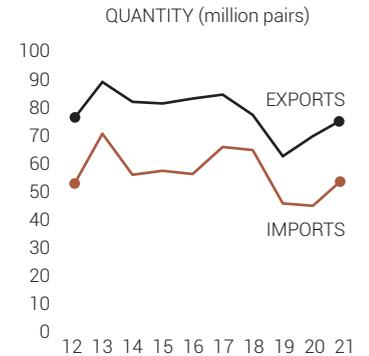


PORTUGAL

CAPITAL	Lisbon	LANGUAGE	Portuguese
AREA (Km ²)	92 226	CURRENCY	Euro
POPULATION	10 million		
GDP PER CAPITA	24 522 USD	GDP 2022	252 billion USD
Δ GDP 2022	6.7%	Δ GDP Last 5 Years	9.0%

FOOTWEAR INDUSTRY

	VALUE		QUANTITY		PRICE
	Million USD	World Rank	Million Pairs	World Rank	USD
EXPORTS	2 111	12	75	19	\$27.99
IMPORTS	743	38	54	49	\$13.77
PRODUCTION			84	20	
CONSUMPTION			63	50	

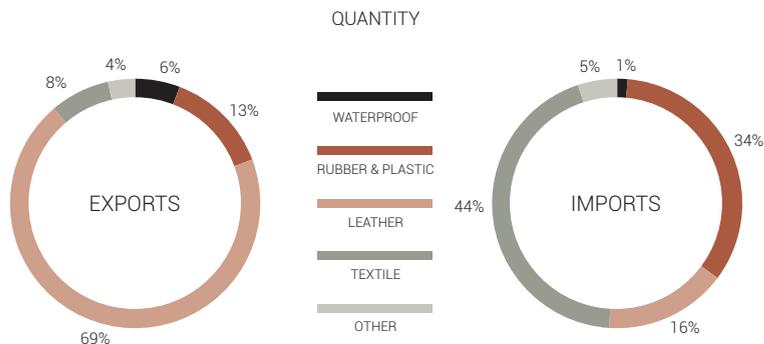


MAIN TRADING PARTNERS

EXPORT MARKETS	Million USD	Value Share	Million Pairs	Quantity Share	LAST 5 YEARS VARIATION	Million USD
Germany	455	22%	16.5	22%	+ United States	47%
France	403	19%	11.9	16%	+ Germany	7%
Netherlands	320	15%	9.5	13%	- Russian Fed.	-73%
Spain	158	7%	10.5	14%	- Spain	-18%
United Kingdom	133	6%	3.8	5%	- France	-13%

IMPORT MARKETS	Million USD	Value Share	Million Pairs	Quantity Share	LAST 5 YEARS VARIATION	Million USD
Spain	289	46%	21.0	47%	+ China	41%
China	85	14%	15.9	36%	+ Germany	40%
Belgium	84	13%	2.6	6%	+ Belgium	29%
Germany	74	12%	3.7	8%	- United Kingdom	-74%
France	64	10%	4.6	10%	- Netherlands	-22%

TYPES OF FOOTWEAR TRADED



RECENT DEVELOPMENTS

Portugal is among the world's top 20 producers of footwear and is the 12th prime exporter. The local industry recently submitted its strategic plan for 2030. In 2022 exports increased by 7%. Germany and France are the main markets but exports to the United States have increased the most in recent years. Neighbouring Spain is the main source of imports.

MAIN PLAYERS

	TURNOVER (million USD)	EMPLOYEES
ECCO'Let (Portugal) - Fábrica de Sapatos, Lda	90.4	1 060
Gabor Portugal - Indústria de Calçado, Lda	79.8	1 070
Sopropé - Organizações de Calçado, S.A.	64.2	510
Ara Shoes Portuguesa, Unipessoal, Lda	59.3	709
Carité - Calçados, Lda	53.8	194

SECTORIAL ORGANIZATIONS

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

FAIRS & EVENTS

n.a.

COUNTRY	CONTINENT	COUNTRY	CONTINENT
Albania	Europe	Kenya	Africa
Algeria	Africa	Korea, Republic	Asia
Argentina	South America	Latvia	Europe
Australia	Oceania	Lithuania	Europe
Austria	Europe	Luxembourg	Europe
Bangladesh	Asia	Malaysia	Asia
Belarus	Europe	Mexico	North America
Belgium	Europe	Morocco	Africa
Bosnia Herzegovina	Europe	Myanmar	Asia
Brazil	South America	Netherlands	Europe
Bulgaria	Europe	New Zealand	Oceania
Cambodia	Asia	Nigeria	Africa
Canada	North America	North Macedonia	Europe
Chile	South America	Norway	Europe
China	Asia	Pakistan	Asia
Colombia	South America	Panama	North America
Croatia	Europe	Paraguay	South America
Cyprus	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

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