

FACTS & NUMBERS



PORTUGUESE SHOES

2024

cluster

companies

footwear - 1171
components - 283
leather goods - 123

1577

employment

footwear - 33057
components - 5455
leather goods - 4063

42575

exports

footwear - 1839
components - 73
leather goods - 310

2222

million euros

As a cornerstone of the Portuguese economy, our footwear cluster sets a global benchmark in quality, sustainability, and innovative design. Despite challenging global conditions, the cluster has successfully capitalized on its post-pandemic recovery, establishing Portugal as a top ten exporter of leather footwear. This reputation is bolstered by a vast and integrated network of more than 1,500 companies, concentrated in the northern region of Portugal. This geographic concentration enables a highly efficient supply chain, allowing for rapid response to market demands and creating a strong regional economy that also includes footwear components and leather goods industries.



economic performance

The footwear cluster employed approximately 42,500 individuals, including 33,000 in footwear manufacturing, and generated €2.2 billion in exports, an increase of 5% since pre-pandemic levels. Footwear itself represents 77% of these exports, with the remainder coming from leather articles (19%) and footwear components (4%). The industry's focus on value-added products has driven Portugal's average footwear export price to €28 per pair, 20% above the average export price before the pandemic, reflecting a steady demand for high-quality leather footwear. Leather goods, including handbags and accessories, continue to expand within the cluster, now accounting for €323 million of exports, with an impressive growth of 63% since 2019. The leather goods sector employs over 4,000 workers, and its growth highlights the diversification and adaptability of the Portuguese footwear cluster, which is progressively branching out from traditional footwear to cater to a broader range of leather goods.

global diversification

The Portuguese footwear cluster products could be found all around the world. They were exported directly to 152 of the 192 member states of the United Nations (excluding Portugal itself) and to 21 other territories. Over the past decade, the cluster has strategically diversified its export portfolio to mitigate risk and capitalize on new growth markets. The United States is its largest non-European market, accounting for 5.2% of the total exports of the Portuguese footwear cluster and continues to show significant growth potential. The industry has also made inroads into emerging markets in Asia and Latin America. In 2023, exports expanded to Latin American countries

such as Argentina, Brazil, Colombia, and Mexico, and to Asian countries such as Hong Kong, Macao, Singapore, and Taiwan. But, even within Europe, diversification is occurring through increased exports to countries such as Bosnia and Herzegovina, Czechia, Estonia, Lithuania, Slovakia, and Slovenia, all with 20% plus growth last year. Still, Europe remains the largest market for the cluster's products, with a little more than half of its exports going to Germany (23%), France (19%), and the Netherlands (12%). The European Union, as a whole, receives just under 80% of the total, driven by strong consumer demand for high-quality, luxury footwear.

'product special- ization'

Leather is the core and origin of the cluster. It is a material with remarkable mechanical, hygroscopic and thermodynamic characteristics that allow for the production of comfortable and long-lasting shoes. These properties give designers great flexibility in the creation of high-quality footwear, bags, and other leather articles.

Leather footwear accounted for 71% of the cluster's exports in 2023, with other leather articles representing another 15%. Portuguese leather shoes are prized for their combination of design, quality craftsmanship and sustainable production practices: the cluster is seeing growth in specialized segments, such as eco-friendly, meeting the rising consumer demand for sustainable products.

But the cluster is increasingly diversifying into other materials: exports of footwear with textile uppers have increased the most (58%) since 2019, followed by those of waterproof footwear (36%). This trend is set to continue in coming years.



strategic
plan
2030:
vision
for
growth
and
innovation

Under its Strategic Plan 2030, Portugal's footwear cluster is committed to sustainable innovation and agile manufacturing, ensuring that buyers benefit from innovative products tailored to evolving global trends. The plan is built around four pillars:

1 Qualification of People and Companies: Continuous training and the provision of intelligence are prioritized to ensure that managers and the workforce can adapt to the latest technological advancements and market trends.

2 Sustainable Products and Processes: The cluster aims to reduce its environmental footprint through sustainable materials, efficient processes, and circular economy practices.

3 Flexibility and Rapid Response: Investments in advanced production technology and agile manufacturing are enhancing the cluster's ability to respond quickly to global market changes.

4 Active Presence in International Markets: A proactive approach to brand positioning and market penetration should help Portuguese footwear expand its reach and attract new customers globally. This strategic approach is reinforced by significant investments in sustainability and innovation. The BioShoes4All initiative, a €80 million project, seeks to establish Portugal as a leader in eco-friendly footwear by developing biomaterials, circular economy practices, and ecological footwear designs. With 70 industry and research partners, BioShoes4All aims to set new standards in sustainable production while enhancing Portugal's global brand image. Another key initiative, FAIST (Agile, Intelligent, Sustainable, and Technological Factory), represents a €40 million investment in building the "factory of the future." Led by a consortium of 44 companies and coordinated by the Portuguese Footwear Technological Centre (CTCP), FAIST focuses on integrating robotics, automation, and smart production technologies. This project will enable faster production, improve resource efficiency, and support Portugal's reputation as a global leader in technologically advanced footwear.



regional roots

global competitiveness

The strategic concentration of the Portuguese footwear industry in northern Portugal creates an environment of rapid innovation, efficiency, and high-quality production—benefits that translate into premium, timely products for buyers. Within no more than 100km from the vibrant town of Porto, there is a dense network of firms dedicated to all aspects of the footwear and leather articles business, from suppliers of raw materials and suppliers to manufacturers of luxury shoes and leather goods. The close proximity of diverse capabilities enables a uniquely collaborative environment where companies can innovate quickly, share resources, and optimize logistics.

This is essential for the cluster's competitiveness in fast-paced international markets. Additionally, the cluster is actively attracting technology-based companies from various industries to develop new materials and equipment and enable more disruptive, efficient processes. CTCP – the technological centre of Portuguese footwear – plays a leading role in these efforts. The integration of technology firms with traditional footwear manufacturers is expanding the industry's technological capacity, reducing dependence on imported technologies, and creating skilled jobs domestically. The FAIST project exemplifies this approach.

outlook and strategic goals for 2030 and

beyond

As Portugal's footwear industry expands its commitment to sustainability and advanced manufacturing, our buyers can expect a steady supply of premium, eco-conscious footwear that meets the highest international standards. The Portuguese footwear cluster is thus well-positioned to continue its trajectory of growth and innovation.

Portugal aims to cement its place as a global leader in premium and eco-friendly footwear. With its Strategic Plan 2030, the cluster is embracing these transformations as opportunities to expand its global presence and deliver products that resonate with consumers worldwide. The cluster's commitment to both tradition and modernity is expected to foster continued growth, allowing Portuguese footwear to remain at the forefront of a dynamic and increasingly competitive global market.

portuguese footwear industry invests to be the most modern in the world

The Portuguese footwear industry aims to “become an international benchmark and strengthen its exports, virtuously combining 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 sustainable and highly competitive production basis”. This is the vision outlined in the Strategic Plan of the Footwear Cluster 2030, recently presented. To that end, it brought together 45 partners and, in a project coordinated by the Footwear Technology Centre of Portugal (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, within the framework of the Recovery and Resiliency Plan (PRR) in the field of Mobilization Agendas, and aims to provide and empower this industry with innovative technologies, processes and sustainable materials, increasing its responsiveness to market demands and continuing to make the Portuguese footwear and leather goods industry the most modern in the world.

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

The Portuguese industry 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 will allow Portuguese footwear and leather goods companies to expand their range of products. On the other hand, in order to optimise production efficiency, the sector ought to increase its degree of specialisation, reducing the waste of energy and resources, with an essential increase in the qualification and training of human resources. Finally, the dissemination of these technologies throughout the sector will be ensured by a structured and innovative communication programme, allowing it to reach an international scale.

One of the most critical areas concerns the attraction of technology-based companies, with tradition and experience in other industries, to develop new equipment and introduce disruptive industrial processes, more efficient and with increased production capacity.

Therefore, the FAIST Agenda will invest in the capacity of Portuguese companies to produce equipment goods and promote innovative processes, thus reducing the share of imports of these technologies and increasing the opportunities for the national industry, with an impact on the growth of skilled jobs.

The implementation of this project will significantly boost the Portuguese footwear and leather goods cluster, increasing its degree of specialisation in new products, and in equipment goods and processes. The result will be a significant increase in market 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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