



CBI
Ministry of Foreign Affairs

CBI Product Factsheet:

Performance Sports Footwear in Europe

Introduction

The European market for performance sports footwear is growing due to increased health-consciousness and offers developing country exporters exciting opportunities. Your best opportunities lie in focussing on three aspects:

1. Research and development (particularly with regard to materials and footwear performance);
2. Supplying to, or following the cues of, the leading brands in performance sports footwear, such as Nike, Adidas and Puma;
3. Compliance with the certification requirements of these leading brands;
4. While Germany offers the largest and most stable market for all footwear, other European countries, such as France, Spain or Italy offer exciting opportunities if you are willing to explore and take more risk.

Main market segments

The market for performance sports footwear can be roughly divided into two main categories:

1. High-performance (or professional) sports footwear
2. Functional sports footwear

Product definitions

The main difference between high-performance (or professional) sports footwear and functional sports footwear is that high-performance footwear is more specialised and used by professional or high-performance-oriented athletes. It is designed and expected to enhance the user's performance, whether in basketball, football, athletics, skiing, rugby or almost any other sport. Footwear in the second category, on the other hand, is not specifically designed to influence performance.

High-performance

High-performance – or professional – sports footwear is footwear designed to influence performance in top sports. The professional sports footwear industry is characterised by ongoing and intensive technological development aimed at weight reduction, durability, stability and flexibility, comfort and foot or ankle support.

Functional

Functional sports footwear is usually based on a traditional design. Performance enhancement is less important in this segment than in that of high-performance sports footwear. Riding boots used in equestrian sports and golf shoes are typical examples of functional sports footwear.

Sports footwear category	Key characteristics
High-performance	Hi-tech shoes geared to fully supporting the foot and body movements typical of the sport in question.
Functional	Shoes that meet the requirements of sports design etiquette, but do not significantly influence sports performance.

HS Codes

64042090 (footwear with outer soles of leather or composition leather and uppers of textile materials)

15201445 (rubber, plastic or leather outer soles)

64052010 (footwear with uppers of textile materials and outer soles of wood or cork)

15201446 (outer soles of other materials)

64052099 (footwear with uppers of textile materials and outer soles of other materials)

64041100 (sports footwear, incl. tennis, basketball, gym, training shoes & the like, outer soles of rubber or plastics & uppers of textile materials)

15202100 (sports footwear with rubber or plastic outer soles & textile uppers)



Above: ski boots are a typical example of functional sports footwear with very specific requirements.



Above: football shoes combining functionality and design



Above: examples of sports footwear in which performance enhancement is key.

Product specifications

Tough and varied requirements

The requirements for footwear used in performance sports are not the same as those for regular (non-sports or low-end sports) footwear. Overall, requirements in both of the main segments in this market are tougher and more varied. For instance, in many sports, users expect their footwear to retain its shape and offer stable performance under sometimes extreme pressure. Requirements regarding weight, durability and resistance are also a lot tougher than those for regular shoes.

For more information on specific sports-related requirements, check these sites:

<http://www.texon.com/product-finder/footwear-product-finder/sport-performance>

<http://www.gore-tex.com/remot/Satellite/content/outerwear-technologies>

Weight reduction

Because of the tough requirements, researchers and developers in this market are constantly looking for the ideal blend of materials and technical innovation. Phylon outsoles are a good example: Phylon is much lighter than rubber or thermoplastic elastomer (TPR), offering an obvious advantage to sprinters, in particular. In the world of professional sports footwear, weight reduction is a permanent point of attention. Below, we will take a closer look at materials.

Shape and profile

The shape of uppers and outsole can also clearly influence sports performance. The production of football shoes with off-centred lacing for better ball contact is a typical example of this. The profile and stiffness of the outsole also matter in this respect. For instance, a rough outsole with a heavy profile may be ideal for outdoor sports, but less suitable indoors. Or a stiff outsole with high slip-resistance may be suitable for sprinting, but would hamper a basketball player. All in all, there are many physical properties that can affect sports performance and therefore must be taken into account in footwear development for this segment.

Production methods

The most commonly used technique for fastening the outsole to the upper in high-performance sports footwear is *cementing*. In cementing, the outsole is pre-produced in a mould and then glued to the upper.

Goodyear welding – a method of stitching the upper to the outsole – is also fairly popular.

Some sports call for specific footwear production methods. Ski shoes and skates, for instance, must offer the user's feet maximum support and therefore tend to be made of synthetic components. The production methods for this kind of footwear are complex and far more costly than standard footwear production methods, as these synthetic components have to be pre-shaped in a mould, while also meeting high quality requirements. Cycling footwear is another example of this kind of specialisation.

Non-performance-related requirements

There are also sub-categories in sports footwear with highly specific requirements, both in terms of design and function. Typical examples include golf, equestrian and hiking footwear. Golf footwear, for instance, faces obvious design demands, as well as the biomechanical demands placed on the golf shoe during the golf swing (stability, force production, resistance to slipping). Also, golf footwear must be suitable for long walks. In equestrian sports, riding boots have both a functional and style component as well. Functionally, they must keep the wearer safe and comfortable both in the saddle and on the ground, with heels that keep the feet from slipping through stirrups, shanks for foot stability, laces for ankle support and leather calves for protection. Hiking shoes must meet tough water-resistant/-repellent requirements, while also offering the user stability and grip.

Tips:

- Keep in touch with the latest developments in footwear material development and production technologies.
- Make sure you know what specific properties footwear in different sports categories should offer its users and look for innovative ways of meeting these demands.
- Invest in research & development of innovative materials.

Outsoles and uppers

In high-performance sports footwear, the emphasis in development tends to be on improving the properties of the shoe. New developments affecting weight and comfort eventually also influence design. Design also tends to depend on whether the shoe in question is based on specific needs, such as:

- Light-weight outsole;
- Gelled outsole;
- A thermal lining insock;
- Breathable system/materials.

In ski and snowboard footwear, design is obviously heavily influenced by the rigid synthetic components required to give the user the necessary support and stability.

Materials

High-performance

The most commonly used materials in high-performance sports footwear are light-weight, high-tech synthetics based on polyurethane (PU) with foam or with a woven backing. Some products have a leather upper. Shoe linings consist mainly of a polyester mesh and the insock is usually made of pigskin leather.

Outsoles are most commonly made of the following materials:

- Rubber;
- Thermoplastic elastomer (TPR);
- Phylon;
- PU;
- Ethylene-vinyl acetate (EVA).

Branded materials

Many branded materials and components are used in high-performance footwear to increase quality and comfort. Here are some examples:

- Gore tex (www.gore-tex.com)
- Teva outsoles (www.teva.com)
- Ortholite insocks (www.ortholite.com)
- Viking outdoor footwear (www.vikingfootwear.com/en/womens/active-outdoor)

Functional

In functional sports footwear, leather tends to be the dominant material. The reason is that in this segment durability is highly valued.

Pricing

High-performance and functional sports footwear are sold across a broad price range, starting at roughly €80 to €90 and rising to €250 or more. Branding and quality are the determining factors.

Colours and design

High-performance

The colours in high-performance sports footwear are similar to those in the mass-market sports segment and usually involve various contrasts against a white background. These contrasts are used on the overlay as well as on the logo and the outsole. Sports footwear is naturally presented in sporty colour combinations.

For up-to-date fashion insights, see [CBI's online Fashion Forecast](#).

Functional

In the functional footwear segment, products are expected to comply with general design etiquette.

General footwear facts

Labelling

All footwear sold in Europe is required to have labels offering information on the main materials used for the three main parts of the shoe: the upper, the lining and insock, and the outer sole. Each label must state – in words or pictograms prescribed by the [EU Directive](#) on this topic – whether the material is “leather”, “coated leather”, “textile” or “other”.

Made-in labelling

The European Commission is working on mandatory origin labelling (the ‘made-in label’) in Europe for all non-food products, including footwear. Until now, made-in labelling is optional, but some buyers already require made-in labelling from their suppliers. Others will be seeking to experiment with it in the coming years in anticipation of EU legislation. *Read more on footwear labelling requirements in the [EU Export Helpdesk](#).*

Packaging

The EU has general legislation on [packaging](#) and [liability](#) that applies to all goods marketed in the EU. Regarding footwear, there is an ongoing trend towards the reduction packaging materials and waste. A good example of this is [Puma’s ‘Clever Little Bag’](#), a shoebox made with a minimum amount of cardboard (*see photo*).

Buyer requirements

In addition to the legal requirements you will face as a developing country footwear exporter accessing the European market, you will also face specific buyer requirements. For a full overview of these requirements, please consult CBI’s Market Information database at <http://www.cbi.eu/market-information/footwear/buyer-requirements>.

Tips:

- Bear in mind that in high-performance sports footwear, the leading brands call the shots. This means that in order to play in this market you should either try to supply to these brands, or their associates, or to follow their cues in terms of design, colour, quality and so on.
- The requirements in high-performance footwear are tough and the leading brands place high demands on certification. Get as highly certified as you can.

Product safety

The European Commission’s [General Product Safety Directive](#) (accessible via the EU Export Helpdesk) basically states that all products marketed in the EU must be safe to use. The Directive provides an overall framework for all specific legislation established for specific products and issues. This means that even if no specific legal requirements have been established for your product and its uses, the General Product Safety Directive still applies. In footwear, one important scheme to be aware of is the REACH scheme (Registration, Evaluation and Authorisation of Chemicals). Also, it is important to note that the use of some materials, such as PVC, in footwear is not allowed.

Tips:

- In order to get an idea of possible infringements, check the RAPEX database used by EU Member States to exchange information on unsafe products.
- Make sure you ask your buyer about specific safety requirements he may have. Some will be content with compliance with EU legislation, leaving you to find out for yourself what these requirements entail. Others may, for example, provide information on which specific substances are not allowed.

Chemicals

The European Union has strict legislation on the use of chemicals in any product, including footwear. For a full overview of EU requirements in this field, please consult CBI’s Market Information database at <http://www.cbi.eu/market-information/footwear/buyer-requirements>.

Trade & Macro-Economic Statistics

General Macro-Economic Statistics

Germany is the largest footwear market in the EU-28, because of its large population (80.5 million). Germans consumers accounted for footwear sales of € 131 per capita in 2013. Per capita consumption in the other leading EU countries was higher: Italy € 162, the UK € 157, France € 156 and Spain € 144 (Source: Eurostat).

	2009	2010	2011	2012	2013	2014	2015	2016
France	-2.9	2.0	2.1	0.3	0.3	0.3	1.1	1.4
Germany	-5.6	4.1	3.6	0.4	0.1	1.6	1.6	1.5
Italy	-5.5	1.7	0.6	-2.3	-1.9	-0.2	0.7	1.4
Spain	-3.8	-0.2	0.1	-1.6	-1.2	1.3	1.8	2.5
UK	-4.3	1.9	1.6	0.7	1.7	2.9	2.5	2.2

Gross Domestic Product (GDP) annual growth rate in current prices, 2009-2016, based on 2014-2016 estimates (Source: Eurostat, 2014)

	2009	2010	2011	2012	2013	2014	2015	2016
France	1,060	1,088	1,114	1,129	1,140	1,146	1,170	1,202
Germany	1,335	1,372	1,429	1,457	1,487	1,518	1,560	1,607
Italy	961	987	1,017	1,005	990	995	1,013	1,042
Spain	611	624	635	634	631	645	661	688
UK	911	956	992	1,026	1,065	1,110	1,160	1,211

Total consumer expenditure in € billion (current prices), 2009-2016, based on 2014-2016 estimates (Source: Eurostat, 2014)

Sings of Renewed Growth

Economic uncertainty makes it difficult to predict the future of Europe's economy in general and its footwear market in particular. What is clear is that after a period of slight decline, the EU footwear market seems to be growing again since 2014. As EU footwear players look for ways to cut cost and innovate, new opportunities are emerging for developing country manufacturers.

The Popularity of Sports Footwear is the Main Growth Driver

Interestingly, the growing popularity of sports footwear – high-performance, mass-market and functional – as a substitute for more traditional footwear types is one of the sector’s main growth drivers. Sports footwear sales have benefited from the general trend towards more active and healthier lifestyles among Europeans. Other drivers include changes in fashion and technological innovations in comfortable footwear.

Import Statistics

Between 2009 and 2013, Germany was Europe’s leading importer with an import share of 19% in terms of value. During the first nine months of 2014, Germany’s sports footwear imports increased by 35% compared to the same period in 2013. Textile uppers showed particular growth, both from outside the EU (+57%) and from other EU countries (+26%). Germany was followed by France (14%), the UK (13%) and Italy (12%). The Netherlands ranked 6th (8%), followed by Belgium (7%) and Spain (6%). In the two figures below you can see, first, how sports footwear compares with other segments in terms of imports, and, second, how Germany’s footwear imports have developed. A few import highlights:

- Imports are growing strongly (10% and more) in Slovakia, the Baltic states, Poland, Romania and Sweden;
- imports in Greece, Croatia, Ireland, Luxembourg, Cyprus and Malta are decreasing.

Much of the footwear sold within the EU is imported from developing countries in South-East Asia, in particular China. In the period 2011-2013, EU imports from China showed a sharp decline. China struggled with rising wages and material costs, while other developing countries succeeded in offering more favourable prices. The large share of imports from other EU countries (intra-EU trade) can be attributed to re-exports (including transito).

	2009	2011	2013	CAGR 2009-13	Change 2012-13
Rubber/plastic uppers					
- waterproof	306.7	509.2	442.6	9.6%	4.6%
- sports	818.7	997.6	997.3	5.1%	1.3%
- indoor	68.9	70.2	60.7	-3.1%	2.2%
- other outdoor	4,767.4	6,259.9	6,375.8	7.5%	2.0%
Total	5,961.7	7,836.9	7,876.4	7.2%	2.1%
Leather uppers					
- sports	666.2	634.7	640.7	-1.0%	-6.9%
- indoor	105.9	114.4	104.6	-0.3%	1.0%
- other outdoor	14,840.7	16,933.3	17,656.9	4.4%	2.9%
Total	15,612.8	17,682.4	18,402.2	4.2%	2.5%
Textiles uppers					
- sports	1,566.2	2,041.5	2,674.4	14.3%	13.1%
- indoor	523.7	641.0	613.4	4.0%	7.2%
- other outdoor	2,779.0	4,173.9	4,855.7	15.0%	4.7%
Total	4,868.9	6,856.4	8,143.5	13.7%	7.5%
Parts of footwear	2,732.7	3,968.2	3,677.0	7.7%	11.6%
Total	29,176.1	36,343.9	38,099.1	6.9%	4.3%

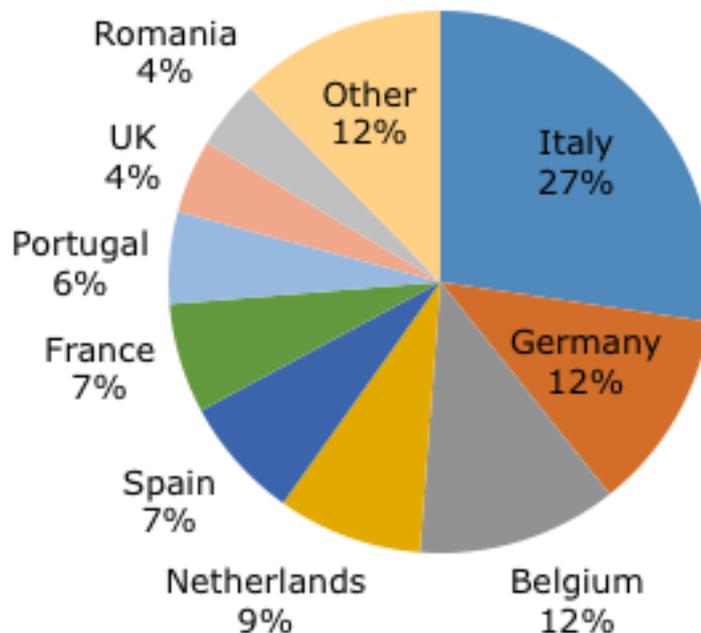
EU imports of footwear by product groups, 2009-2013, in € million (Source: Eurostat, 2014)

	2009	2011	2013	CAGR 2009-13	Change 2012-13
Rubber or plastic uppers					
- Ski boots	375	473	472	4.4%	7.3%
- Snowboard boots	51	49	48	-5.2%	-16.2%
- Other sports footwear	1,417	1,960	2,034	6.9%	-1.6%
Leather uppers					
- Ski boots	6	6	22	34.2%	-11.0%
- Other sports footwear	2,444	2,520	1,205	-15.5%	-31.3%
Textile uppers	5,066	5,394	8,482	15.4%	26.9%
Total	9,359	10,402	12,263	11.1%	17.7%

Imports into Germany of sports footwear, 2009-2013 in '000 pairs (Source: Eurostat, 2014)

Export Statistics

Footwear exports from the EU, particularly leather uppers, have continued to rise in recent years. These exports include so-called re-exports, i.e. imported products that are exported to other (mainly EU) countries. This explains why Europe's export figures are higher than its import figures. Re-export percentages are highest in Germany, Belgium and the Netherlands. The pie chart below shows which EU countries are the biggest exporters. Specific data on sports footwear (re-)exports are not available.



At right: Footwear exports by EU countries in 2013, in € million (Source: Eurostat, 2014)

Production Statistics

Production of sports footwear is slowly decreasing in many European countries. One of the reasons is increased competition from low-cost countries outside of Europe, notably developing countries. As an illustration of this trend, the tables below shows footwear production figures for two of Europe's leading markets in this sector, Germany and France.

	2009	2010	2011	2012	2013	CAGR 2009-13
Rubber or plastic outer soles and textile uppers	6,112	10,261	4,686	5,417	5,384	-3.1%
Other sports footwear (excl. snow board and ski-boots)	24,545	30,239	32,528	32,437	28,266	3.6%
Total	30,657	40,500	37,214	37,854	33,650	2.4%

Production of sports footwear in Germany, 2009-2013, in € thousands (Source: Prodcum, 2014)

	2009	2010	2011	2012	2013	CAGR 2009-13
Rubber or plastic outer soles and textile uppers	c	920	c	c	c	-
Other sports footwear (excl. snow board and ski-boots)	17,734	17,310	10,911	2,818	1,814	-43.4%

c= confidential

Production of sports footwear in France, 2009-2013, in € thousands (Source: Prodcum, 2014)

Trends

The health trend is fuelling sports and outdoor footwear sales

An important trend affecting footwear is the health trend. Europeans are more health-conscious than ever nowadays. This means there are exciting opportunities for many kinds of sports and outdoor footwear, whether in high-performance, functional or mass-market products.

More on trends

If you're interested in an overview of these and other important trends affecting European and global footwear, please consult CBI's Trends for Footwear on our website.

Market Channels & Segments

If you need more insight in the market channels and segments in European footwear, please consult CBI's [Market Channels & Segments for Footwear](#) on our website. Generally speaking, low-end footwear is sold primarily in high volumes by typical mass-market retailers, such as Deichmann and Scapino. An interesting exception are the non-footwear outlets that offer cheap footwear, such as supermarkets, fuel stations and DIY chains.

Price

Pricing in this segment can be divided into several categories:

Price range	Type of product
€0 to €10	Usually simple footwear with few details, sold by retailers in large crates or at the cash register. Examples: slippers and toe slippers.
€10 to €20	Typically sports, casual or fashion shoes made of synthetic materials.
€20 to €30	This is the middle range in this segment.
€30 to €40	Slightly more luxurious footwear, including cheap editions of brand footwear, casual shoes with minor details in leather or more developed fashion footwear.

Field of Competition

If you need more insight in the competitive forces affecting European and global footwear, please consult CBI's [Field of Competition for the Footwear Sector](#) on our website.

Useful sources

Below are some useful resources if you are interested in broadening your understanding European and global footwear:

- Riva Italy: www.exporivaschuh.it
- GDS Germany: www.messe-duesseldorf.com
- Canton shoe fair: www.chinaexhibition.com
- Guangzhou shoe fair: www.chinaexhibition.com, www.worldfootwear.com
- Ispo Munich: www.ispo.com
- Shoe fair Shanghai/Hongkong: www.hktdc.com
- ISO 9001: www.iso.org
- SGS chemical testing: www.sgs.com
- Satra research & testing: www.satra.co.uk
- Duty calculator: www.dutycalculator.com/popular-import-items/import-duty-and-taxes-for-leather-shoes/



CBI Market Intelligence

P.O. Box 93144
2509 AC The Hague
The Netherlands

www.cbi.eu/market-information

marketintel@cbi.eu

This survey was produced for the CBI by Giovanni Beatrice and Stephen Teeuwen with input from various (EU market) sources, including Scapino, Pwh and Jente Hageman of New World China.

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