



CBI
Ministry of Foreign Affairs

CBI Trade Statistics:

Footwear sector in Europe

Introduction

A large share of footwear sold within the EU is sourced from developing countries in South-East Asia, in particular China. With China getting more expensive (higher wages, costs of materials etc.) and import tariffs set by the EU favouring other countries, there are increased opportunities for suppliers from other developing countries. Also, the EU industry is looking for ways to cut costs by working together with suppliers and producers in low cost countries. The EU footwear market is expected to grow again in 2015. The major stimulants are the changes in fashion, growing popularity of sports footwear as a substitute for more traditional footwear types, as well as technological innovations in comfortable footwear.

Imports

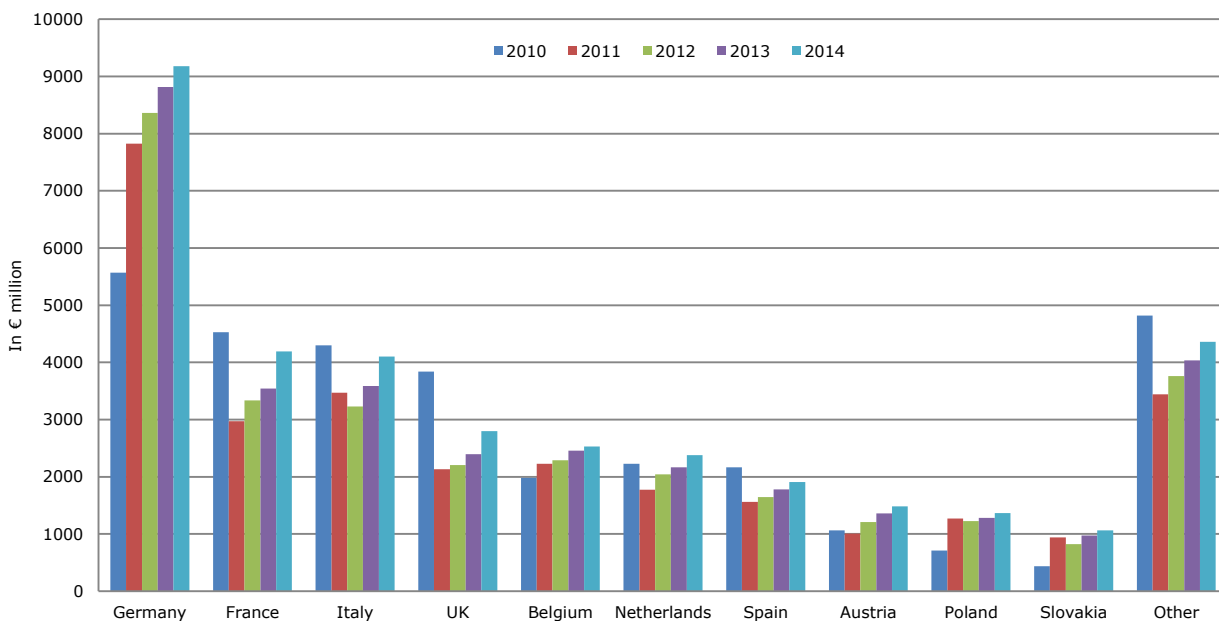
According to the official import statistics, footwear can be classified:

- by type of product (outdoor, indoor sports or safety footwear), and/or
- by materials used for uppers and outer soles.

For some products, mainly outdoor footwear, a more detailed classification is possible, for instance:

- by user, like children (inner sole less than 24 cm.), men, women or both sexes, and/or
- by type of footwear, like whether or not covering the ankle, the height of the heels, the presence of a vamp of straps etc.

Figure 1: EU footwear imports, top-10 EU countries, in € million



Source: Eurostat 2015

During the period 2010-2014, imports of footwear increased steadily and reached € 40.8 billion, which is 29% higher than in 2010. In 2014, Germany remained the leading importer with an import share of 19% in terms of value, followed by France (14%), the UK (13%) and Italy (12%). EU countries can be divided, as to developments in value of imports during the period 2010-2014, into two extremes:

- strongly growing imports (10% and more) which was noticeable in many Eastern EU countries including in Slovakia, the Baltic states, Poland, Romania and Hungary
- decreasing imports: The imports of Southern EU countries performed below average and even decreased in the case of Greece, Cyprus and Malta.

Developments of the other EU countries can be derived from Annex A.

Table 1: EU imports of footwear by product groups, 2010-2014 (in € million)

	2010	2012	2014	CAGR* 2010-14	Change 2013-14
Rubber or plastic uppers					

- waterproof	455	459	506	2.7%	4.4%
- sports	1010	983	1162	3.6%	13%
- indoor	68	59	74	2.2%	17%
- other outdoor	5,747	6,226	7,374	6.4%	14%
Total	7,280	7,728	9,116	5,8%	16%
Leather uppers					
- sports	670	688	739	2.5%	12%
- indoor	125	104	110	-3.1%	4.8%
- other outdoor	16,173	17,359	19,029	4.1%	5.9%
Total	16,968	18,151	19,877	4.0%	6.6%
Textiles uppers					
- sports	1,867	2,363	3,601	18%	25%
- indoor	603	572	656	2.1%	6.3%
- other outdoor	3,035	4,047	4,508	10%	6.3%
Total	5,504	6,982	8,766	12%	16%
Wooden shoes and other footwear	333	379	432	6.8%	9.7%
Parts of footwear	1,576	2,476	2,717	15%	7.1%
Total	31,660	35,717	40,888	6.6%	11%

*Compounded Annual Growth Rate
Source: Eurostat 2015

From Table 1 it becomes clear that the imports of footwear with textile uppers increased especially strong (+12%) between 2010 and 2014. This was partially due to the increasing popularity of sports footwear in the EU. The growing popularity of sports footwear as a substitute for more traditional footwear types is one of the sector's main growth drivers. In addition, imports of parts of footwear grew strongly (+15%).

Tip:

- Refer to the CBI factsheet [Mass Market Sports Footwear in Europe](#) for more information on this growing market.

Table 2: EU imports of footwear by leading countries intra- and extra EU, 2010-2014 (in € million)

	2010	2012	2014	CAGR* 2010-14	Change 2013-14
TOTAL EU-28	31,644	35,702	40,888	6.6%	11%
Intra-EU trade					
Of which from:					
Italy	3,572	3,802	4,192	4.1%	5.2%
Germany	1,848	2,295	3,163	14%	25%
Belgium	2,269	2,649	2,883	6.2%	10%
Netherlands	1,672	2,043	2,628	12%	14%
Spain	1,270	1,383	1,598	5.9%	7.9%
Extra-EU trade					
Of which from:					
China	7,296	7,930	8,249	3.1%	6.1%
Vietnam	2,099	2,129	2,774	7.2%	26%

India	1,147	1,115	1,348	4.1%	14%
Indonesia	933	1,246	1,256	7.7%	3.3%
Tunisia	483	428	409	-4.1%	2.4%
Bosnia & Herzegovina	226	254	352	12%	20%
Cambodia	217	302	349	13%	12%
Morocco	262	276	315	4.7%	1.7%
Albania	175	210	295	14%	25%
Bangladesh	105	142	225	21%	34%
Brazil	389	236	202	-15%	18%
Thailand	246	195	172	-8.6%	15%

*Compounded Annual Growth Rate

Source: Eurostat 2015

Between 2010 and 2014 developing countries lost market share (from 45% in 2010 to 40% in 2014). China retained its leading position as leading exporter to the EU in 2014. However growth of China stayed behind with its market share decreasing from 23% in 2010 to 20% in 2014. China struggled with rising wages and material costs, while other developing countries succeeded in offering more favourable cost prices. The strong decrease of Brazil (-15% per year between 2010 and 2014) and Thailand (-8.6%) and Tunisia (-4.1%) were compensated by increases from countries such as Bangladesh (+21% per year), Cambodia (+13%) and Bosnia-Herzegovina (+12%). Other traditional partners showed an average growth, like Indonesia (+7.7% per year), Vietnam (+7.2%) and India (+4.1%). The developments in trade were influenced by the change in the Generalized Scheme of Preferences (GSP) (effective from 2014 onwards) of the EU that has determined new import tariffs for products from developing countries. Countries that were excluded from paying import tariffs, such as China and Brazil, no longer benefit from this scheme. The competitive position of countries such as Cambodia, Bangladesh and Pakistan, that still fall under GSP scheme, has therefore become stronger.

Tips:

- Price and EU import tariffs (GSP) will remain key drivers in procurement and relocation strategies. The sourcing continues to take place in Asia, but retail and brand buyers are widening their outlook with regard to alternative sourcing destinations. With China gradually becoming too expensive, EU buyers will increasingly look for alternatives. Suppliers in developing countries with a strong cost advantage should proactively establish contact with EU buyers.
- The GSP is scheduled for another review after 31 December 2016. Follow developments closely on the [website](#) of the EU as it can have a significant impact on your competitive position.
- Refer to the [TARIC consultation database](#) to check the import tariffs that apply to your own or competing countries.

Tables 3-9 provide an overview of the footwear products imported most by the EU. The tables focus specifically on the size and development of developing countries.

Table 3: EU imports of sports footwear with rubber or plastic uppers, 2010-2014 2014 (in € million)

	2014	CAGR* 2010-14	In % of total
TOTAL EU-28	1,162	3.6%	100%
Intra-EU trade	804	3.8%	69%
Extra-EU trade	358	3.2%	31%
Developing countries	352	3.2%	30%
China	156	-2.9%	13%
Vietnam	71	6.1%	6.1%
Indonesia	57	7.4%	4.9%
Bosnia & Herzegovina	43	12%	3.7%
Cambodia	20	59%	1.7%
Turkey	1.3	68%	0.1%
Serbia	1.1	13%	0.1%
Thailand	0.8	-29%	0.1%
Other DCs	1.1	-16%	0.1%

*Compounded Annual Growth Rate
Source: Eurostat 2015

Table 4: EU imports of outdoor footwear rubber or plastic uppers (excl. sports footwear), 2010-2014 (in € million)

	2014	CAGR* 2010-14	In % of total
TOTAL EU-28	7,374	6.4%	100%
Intra-EU trade	3,347	13%	45%
Extra-EU trade	4,026	2.1%	55%
Developing countries	3,996	2.2%	54%
China	3,049	1.2%	41%
Vietnam	479	0.3%	6.5%
Indonesia	129	14%	1.7%
Cambodia	79	12%	1.1%
Morocco	52	23%	0.7%
Brazil	43	0.8%	0.6%
Tunisia	40	9%	0.5%
Bangladesh	35	30%	0.5%
Other DCs	90	5.5%	1.2%

*Compounded Annual Growth Rate
Source: Eurostat 2015

Table 5: EU imports of sports footwear leather uppers, 2010-2014 (in € million)

	2014	CAGR* 2010-14	In % of total
TOTAL EU-28	739	2.5%	100%
Intra-EU trade	620	3.9%	84%
Extra-EU trade	119	-3.7%	16%
Developing countries	110	-4.3%	15%
China	52	-6.2%	7.0%

Vietnam	27	-6.3%	3.6%
Indonesia	7	-12%	1.0%
India	5	11%	0.6%
Bosnia & Herzegovina	4	4.8%	0.6%
Thailand	4	-2.6%	0.6%
Malaysia	3	251%	0.4%
Pakistan	2	6.0%	0.3%
Other DCs	6	5.5%	0.8%

*Compounded Annual Growth Rate

Source: Eurostat 2014

Table 6: EU imports of outdoor footwear leather uppers (excl. sports footwear), 2010-2014 (in € million)

	2014	CAGR* 2010-14	In % of total
TOTAL EU-28	12,149	5.0%	64%
Intra-EU trade	6,880	2.7%	36%
Extra-EU trade	6,529	2.1%	34%
Developing countries	1,956	3.6%	10%
China	1,116	4.8%	5.9%
Vietnam	1,066	3.2%	5.6%
India	698	2.4%	3.7%
Indonesia	240	-6.8%	1.3%
Tunisia	191	12%	1.0%
Bosnia & Herzegovina	180	-1.1%	0.9%
Morocco	155	10%	0.8%
Albania	146	20%	0.8%
Bangladesh	137	5.6%	0.7%
Cambodia	644	-8.0%	3.4%
Other DCs	12,149	5.0%	64%

*Compounded Annual Growth Rate

Source: Eurostat 2014

Table 7: EU imports of sports footwear uppers of textiles, 2010-2014 (in € million)

	2014	CAGR* 2010-14	In % of total
TOTAL EU-28	3,601	18%	100%
Intra-EU trade	2,014	19%	56%
Extra-EU trade	1,588	16%	44%
Developing countries	1,575	16%	44%
China	648	6.3%	18%
Vietnam	574	26%	16%
Indonesia	249	30%	6.9%
Cambodia	63	47%	1.8%
India	23	94%	0.7%
Thailand	10	0%	0.3%
Turkey	2.4	66%	0.1%
Other DCs	4.0	-29%	0.1%

*Compounded Annual Growth Rate Source: Eurostat 2015

Table 8: EU imports of footwear uppers of textiles (excl. sports footwear), 2010-2014 (in € million)

	2014	CAGR* 2010-14	In % of total
TOTAL EU-28	656	2.1%	100%
Intra-EU trade	234	3.9%	36%
Extra-EU trade	422	1.2%	64%
Developing countries	414	1.2%	63%
China	376	1.3%	57%
Vietnam	14	-4.4%	2.1%
Turkey	6.1	-4.7%	0.9%
Thailand	3.2	9.5%	0.5%
Albania	2.7	16%	0.4%
Bosia & Herzegovina	2.3	32%	0.4%
Serbia	2.0	26%	0.3%
Morocco	1.8	4.4%	0.3%
Indonesia	1.1	21%	0.2%
Other DCs	5.0	-7.2%	0.8%

*Compounded Annual Growth Rate
Source: Eurostat 2015

Table 9: EU imports of indoor footwear uppers of textiles, 2010-2014 (in € million)

	2014	CAGR* 2010-14	In % of total
TOTAL EU-28	4,508	10%	100%
Intra-EU trade	2,306	16%	51%
Extra-EU trade	2,203	5.9%	49%
Developing countries	2,160	5.9%	48%
China	1,556	5.9%	35%
Vietnam	367	4.4%	8.1%
Indonesia	50	3.7%	1.1%
Cambodia	45	4.4%	1.0%
Thailand	33	7.0%	0.7%
Bangladesh	32	24%	0.7%
India	19	6.0%	0.4%
Tunisia	8.7	6.9%	0.2%
Brazil	6.9	-4.5%	0.2%
Other DCs	42	18%	0.9%

*Compounded Annual Growth Rate
Source: Eurostat 2015

Exports

Exports by the EU are discussed in this section to provide an insight into intra-EU trade, re-exports and trade to countries outside the EU.

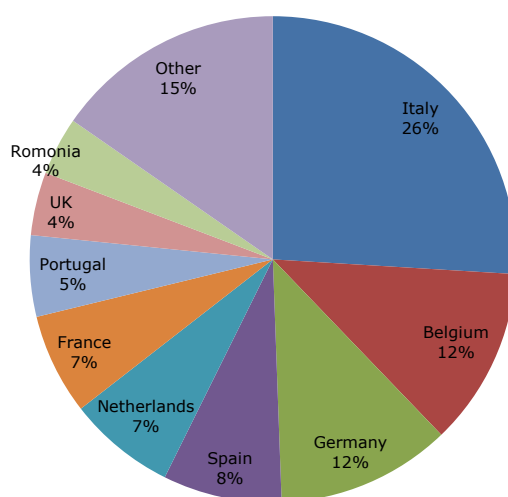
Table 10: EU exports of footwear by product groups. 2010-2014 (in € million)

	2014	CAGR* 2010-14	Change 2013-14
Uppers of:			

- rubber or plastic	5,883	9.9%	17%
- leather	21,073	6.8%	5.3%
- textile materials	5,750	15%	19%
- other materials	488	9.8%	7.9%
Parts of footwear	2.183	18%	5.1%
Total	35,377	9.1%	9.2%

*Compounded Annual Growth Rate
Source: Eurostat 2015

Figure 2: Footwear exports by EU countries in 2014, in € million



Source: Eurostat 2015

Table 11: Destinations of EU exports 2010-2014 (in € million)

	2014	Share leather uppers	CAGR* 2010-14
TOTAL EU-28	35,362	60%	9.1%
of which:			
<i>Intra-EU trade</i>	27,060	56%	8.0%
Extra-EU trade	8,302	73%	13%
of which to:			
United States	1,444	84%	12%
Switzerland	1,193	80%	11%
Russia	1,052	84%	8.9%
Hong Kong	514	86%	22%
Turkey	468	47%	16%
Japan	414	74%	8.9%
China	333	89%	32%
Norway	245	64%	4.8%
United Arab Emirates	237	83%	22%
Canada	219	74%	11%

Other	2,184	56%	15%
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*Compounded Annual Growth Rate

Source: Eurostat 2015

Footwear exports from the EU continue to rise. Exports of leather uppers accounted for 60% of total exports.

Exports by all major footwear exporting countries increased during the period 2010-2014: Italy (+7.1% per year), Belgium (11%), Germany (10%), Spain (11%), the Netherlands (6.9%) and France (12%). Exports by other EU countries can be derived from Annex A.

Exports include the so-called re-exports: imported products, which are exported to other (mainly other EU) countries. These percentages are highest for countries like Germany, Belgium and the Netherlands.

The EU trade deficit in footwear decreased strongly, thanks to steadily increasing exports (+9.1% per year between 2010-2014) with a particular surge to top markets: Hong Kong (+22% per year), United Arab Emirates (22%) and the USA (+12%). EU exports also increased to significantly to countries close to the EU such as Bosnia and Herzegovina (+25% per year), Serbia (25%) and Morocco (22%).

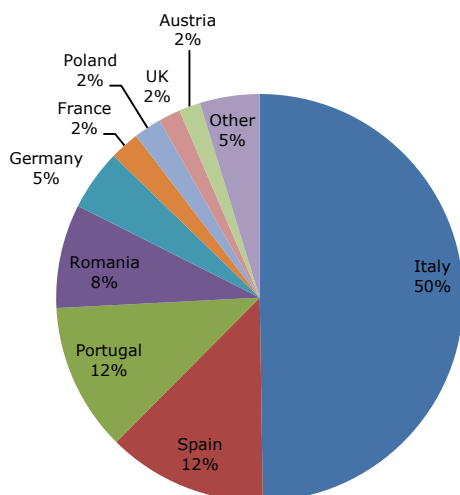
Tip:

- Obtain a good picture of the trade flows for your product. It can be crucial for your country strategy. It may be more effective to focus on a region rather than a specific country. Refer to CBI's [product factsheets](#) for more information.

Production

EU producers are an important source of competition. Therefore, learn more about the development of EU production in the section below.

Figure 3: EU production of footwear in 2014



Source: Eurostat, Prodcom 2015

Table 12: EU production of footwear by product groups, 2010-2014 (in € million)

	2010	2012	2014	CAGR* 2010-14	Change 2012-13
Rubber or plastic uppers					
- indoor	19	16	11	-12%	7.3%
- protective metal toe cap	63	66	87	8.1%	8.4%
- waterproof	202	158	151	-7.0%	-8.0%
- other outdoor	276	279	304	2.4%	9.1%
Leather uppers					
- indoor	124	113	108	-3.4%	3.2%
- protective metal toe cap	611	664	799	7.0%	8.5%
- other outdoor	9,224	10,643	11,947	6.7%	7.2%
Textiles uppers					
- indoor	215	186	202	-1.6%	5.4%
- sports	86	97	91	1.3%	11.3%
- other outdoor	469	532	520	2.6%	2.9%
Other sports	651	535	588	-2.5%	3.1%
Other footwear (wooden etc.)	276	370	328	4.4%	-11%
Parts of footwear	1,918	1,880	2,412	5.9%	6.5%
Total	14,135	15,540	17,548	5.6%	8.1%

*Compounded Annual Growth Rate

Source: Eurostat/Prodcom, 2015

- In 2014, the total value of EU production was € 17.4 billion compared to € 14.1 billion in 2010.
- Production in the 28 EU countries can be found in Annex A of this survey. It should be noticed that since 2013 for several reasons production for several producing EU countries is not reported for confidentiality reasons. EU production is therefore somewhat higher than given.
- In 2014, Italy accounted for 50% of total EU production, being known for its artisanship and for its high fashionable and innovative footwear. Spain (13%), Portugal (12%) and Romania (8.2%) were other important EU producers. The EU has traditionally been an important supplier of high quality footwear to the world market. However, production of high volume items has been outsourced to mainly Asia. Now 6 out of 10 shoes in the world are produced in China.
- The EU footwear production industry concentrates on providing added value in better designs, quality materials, comfort and in other innovations e.g. vegetable tanned shoes to meet the strict environmental rules and to compete with China, Vietnam, Indonesia and India.
- Developing countries meet fierce competition from Romania. Manufacturing of parts of footwear is the most important product group in Romania and Italy the most important destination of exports. By 2013, Chinese shoe imports comprised 18% of Italy's import market, while Romanian footwear captured 14% of total trade value. Several Italian companies invested in production facilities in Romania, based on low wages and craftsmanship.

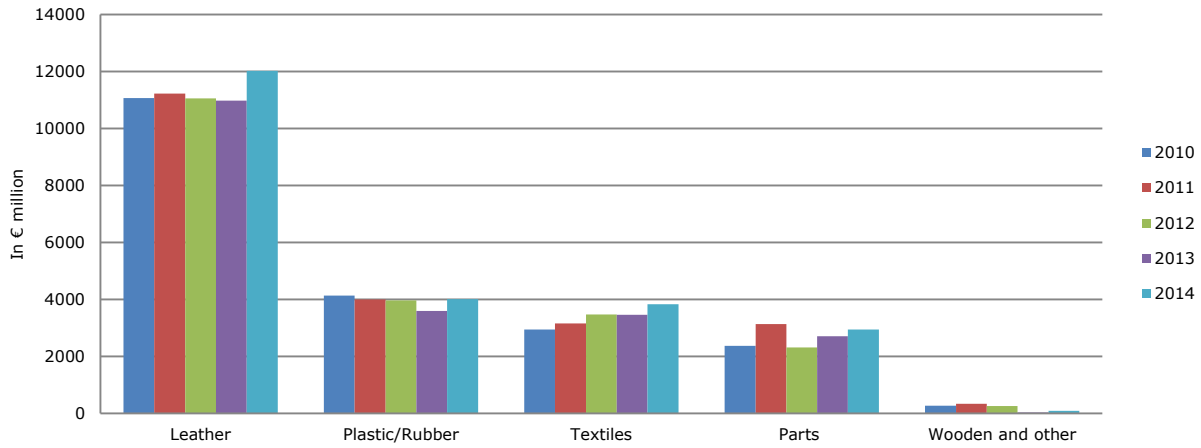
Tip:

- Eastern and South eastern European countries, are also attractive destinations for products from developing countries. For example, products can be exported to these countries for specific further processing (i.e parts and semi-finished footwear) due to the large presence of factories. In addition, they can grant access to European countries as well as Russia, Turkey and the Middle East.

Consumption

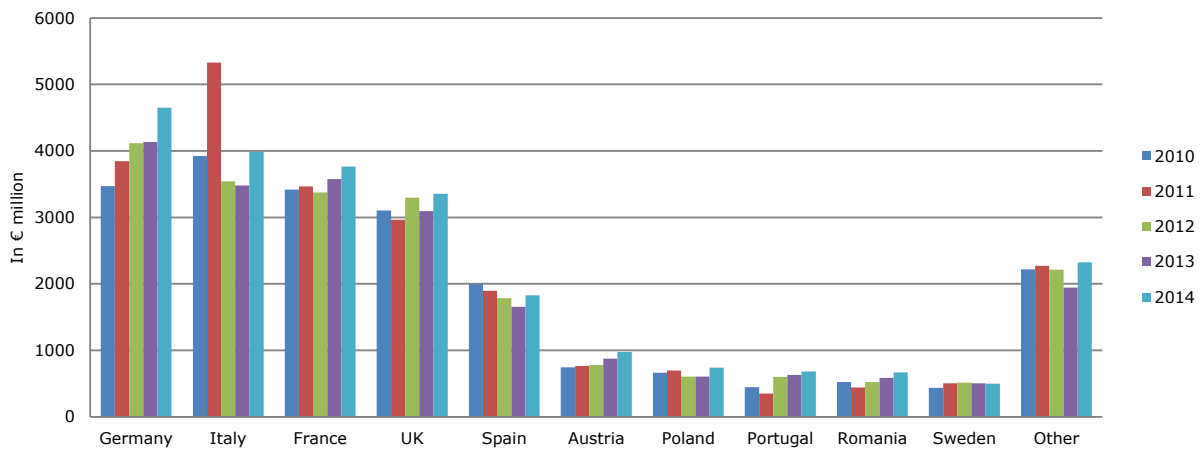
To learn more about EU markets and trends that will determine the footwear market in years to come, please read the section below.

Figure 4: EU footwear consumption by user, 2010-2014 in € million



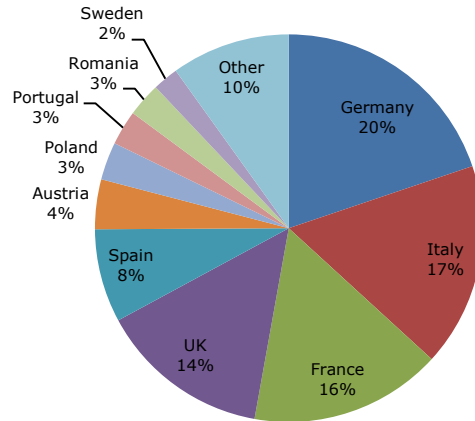
Source: Eurostat/ProdCom (2015)

Figure 5: Footwear consumption, top-10 EU countries, 2010-2014, in € million



Source: Eurostat/ProdCom (2015)

Figure 6: EU footwear consumption by country in 2014, in %



Source: Eurostat/ProdCom (2015)

- Consumption of footwear in the 28 EU countries increased slightly to € 23.5 billion in 2014, representing a compound annual growth rate (CAGR) of 2.9% between 2010 and 2014. The five leading countries (Germany, Italy, France, UK, and Spain) account for 75% of EU footwear consumption.
- The developments of consumption in the different EU member states is varied. Among the best performing countries were Denmark (+7.6%), Germany (7.6%) and Austria (6.9%). Several eastern EU countries, like Poland (+6.6% per year), Latvia (+14%) and Estonia (+19%) also saw a large growth in consumption of footwear. It is expected that this growth will be continued. Several developments in distribution (from informal to retail store chains), consumption (popularity of international brand names and of sports footwear) led to a growth in the footwear market of East European countries.
- Between 2010 and 2014, the many southern EU markets of Spain (-2.1% per year), Greece (-6%), Cyprus (-6.3%) and Malta (-4.9%) showed the largest declines. Changes in disposable incomes led to a reduction in purchases of footwear. Further developments in the individual EU countries can be found in Annex A.
- In 2014, the EU demand consisted of footwear of leather (52%), plastic/rubber (18%), textiles (17%), parts (13%) and wood and other (0.4%). The demand for textile footwear (+7.7% per year) and footwear parts (+5.5%) increased significantly between 2010 and 2014.
- Increased health consciousness and the shift towards comfort in daily footwear will continue to encourage the growth of sports footwear, in particular, sports inspired footwear will dominate consumption. Sports footwear as well as sports inspired footwear are expected to grow in popularity in all EU countries, even in declining markets of South European countries, like Italy, Spain and Greece.

Tips:

- With strong growing demand for footwear in many developing countries, it is advised to also focus increasingly on local and regional trade opportunities. Use [ITC's Trademap](#) to determine which countries are increasing their imports and how trade with your country is developing.
- DC exporters are encouraged to enter the market and target niche areas where growth potential exists and there are fewer competitors. See, for example, the [CBI's factsheets](#) on Specialty Footwear and Fashion Footwear.
- Know your end market (segment), so that you can proactively support your buyers in reaching it.



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Annex A: Comparison of consumption, production, imports and exports of footwear by EU countries, 2010-2014 (in million euro)

	Consumption*		Production*		Imports		Imports from developing countries			Exports	
	Value 2014	CAGR** 2010-14	Value 2014	CAGR** 2010-14	Value 2014	CAGR** 2010-14	Value 2014	% of total imports	CAGR** 2010-14	Value 2014	CAGR** 2010-14
EU-28	23,457	2.9%	16,654	4.2%	40,888	6.6%	16,763	41%	4.1%	35,362	9.1%
Germany	4,651	7.6%	804	4.3%	7,950	9.3%	3,452	43%	7.5%	4,103	10%
Italy	3,987	0.4%	8,286	5.9%	4,882	3.2%	2,448	50%	1.0%	9,181	7.1%
France	3,763	2.4%	392	-1.8%	5,747	6.1%	1,741	30%	4.8%	2,376	12%
UK	3,352	1.9%	289	6.6%	4,548	4.3%	2,395	53%	0.1%	1,485	11%
Spain	1,830	-2.1%	2,113	5.7%	2,514	3.8%	1,323	53%	2.0%	2,796	11%
Austria	975	6.9%	285	2.5%	1,491	8.8%	216	14%	3.4%	801	8.7%
Poland	741	2.8%	367	3.9%	1,152	13%	296	26%	21%	777	21%
Portugal	681	11%	1,954	11%	634	4.3%	135	21%	10%	1,907	8.4%
Romania	666	6.3%	1,373	2.7%	659	15%	120	18%	8.2%	1,366	5.8%
Sweden	501	3.4%	-	-	726	5.3%	211	29%	0.3%	226	10%
Greece	410	-6.0%	38	-15%	441	-3.9%	156	35%	-2.8%	69	1.8%
Finland	306	0.6%	120	-2.1%	319	4.9%	90	28%	12%	133	8.6%
Denmark	288	8.8%	8.8	-26%	777	4.2%	269	35%	-2.1%	497	0.7%

Ireland	286	-0.8%	-	-	323	-1.7%	60	18%	-3.5%	37	-7.6%
Netherlands	265	-2.6%	-	-	2,794	3.8%	1,270	45%	1.9%	2,529	6.9%
Hungary	210	22%	191	6.9%	398	14%	53	13%	12%	378	7.2%
Croatia	142	48%	87	106%	235	8.6%	32	14%	-26%	180	5.7%
Slovenia	79	8.6%	8.2	33%	240	10%	108	45%	19%	169	11%
Luxembourg	70	35%	-	-	93	1.2%	40	4.3%	-31%	23	-24%
Latvia	67	14%	-	-	100	15%	74	7.5%	4.1%	32	18%
Estonia	58	19%	2.1	-38%	99	16%	91	9.2%	21%	43	1.3%
Cyprus	55	-6.3%	-	-	59	-5.7%	10	18%	-4%	43	4.2%
Lithuania	55	-1.4%	8.8	-1.6%	160	23%	24	15%	14%	114	51%
Slovakia	17	n.a.	242	2.9%	838	18%	270	32%	16%	1,064	11%
Malta	16	-4.9%	-	-	22	-1.5%	69	32%	5.4%	55	14%
Czech Republic	n.a.***	-	26	-6.1%	641	6.8%	152	24%	-2.8%	667	17%
Belgium	n.a.***	-	-	-	2,908	10%	1,875	64%	12%	4,192	11%
Bulgaria	n.a.***	-	58	7.5%	139	8.5%	31	22%	11%	206	3.8%

* It should be noticed that since 2013 for several reasons production for several producing EU countries is not reported for confidentiality reasons. EU production and consumption is therefore somewhat higher than shown in the table above.

** Compound annual growth rate

** Not available due to negative consumption calculated

Sources: Eurostat/ProdCom (2015)