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CEGEA

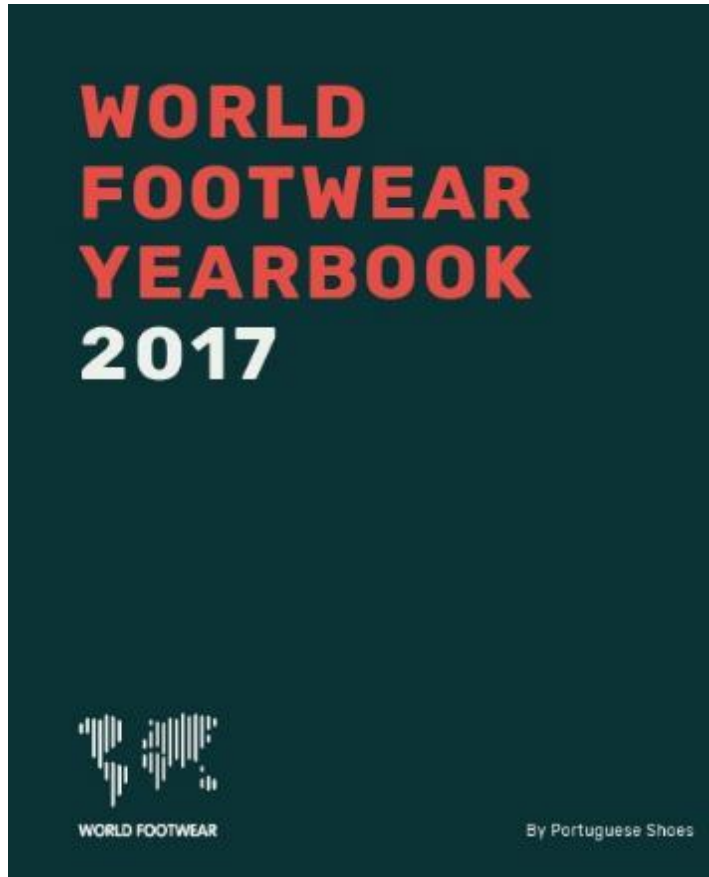
RESEARCH CENTRE IN MANAGEMENT
AND APPLIED ECONOMICS

The Footwear Industry Worldwide

Vasco Rodrigues

20th UITIC Congress
Porto, May 17, 2018

World Footwear Yearbook

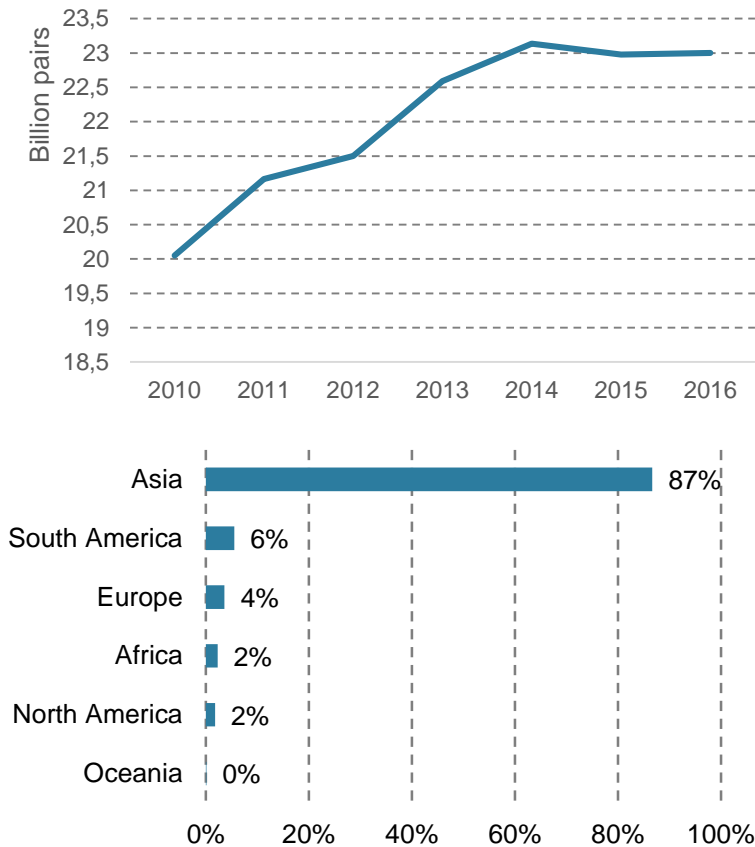


- Since 2011
- Global statistics for exports imports, production and consumption
 - Value, volume and average price
 - 5 product categories
 - For the latest 10 years
- Detailed profiles for 80 countries



23 billion pairs produced (2016)

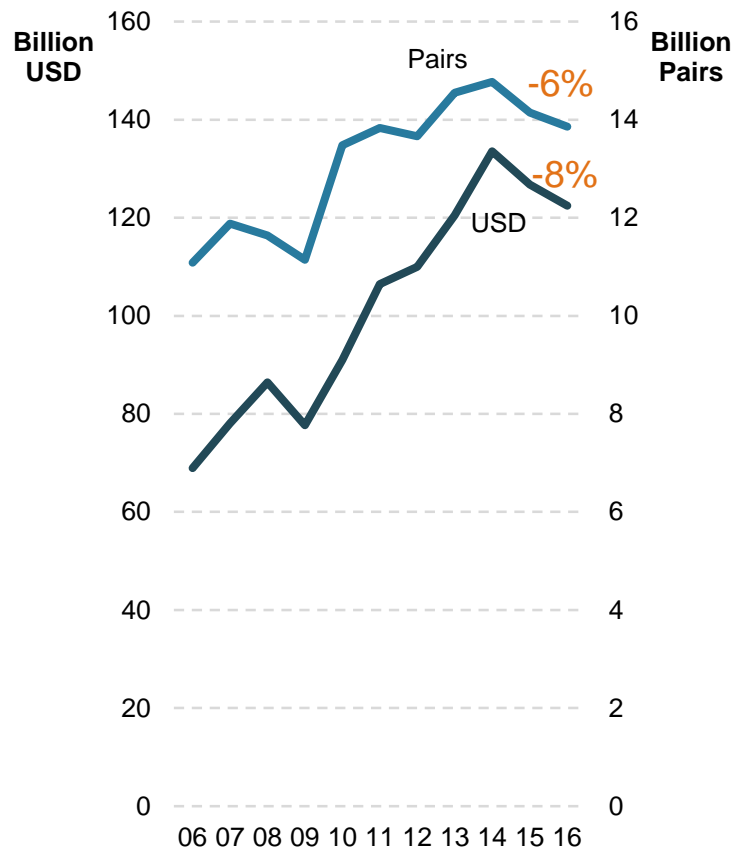
3 pairs per person



Country	Share
China	57.0%
India	9.8%
Vietnam	5.2%
Indonesia	4.8%
Brazil	4.1%
Turkey	2.2%
Bangladesh	1.7%
Pakistan	1.6%
Mexico	1.1%
Thailand	0.9%
TOP 10	88.4%



14 billion pairs exported (2016)

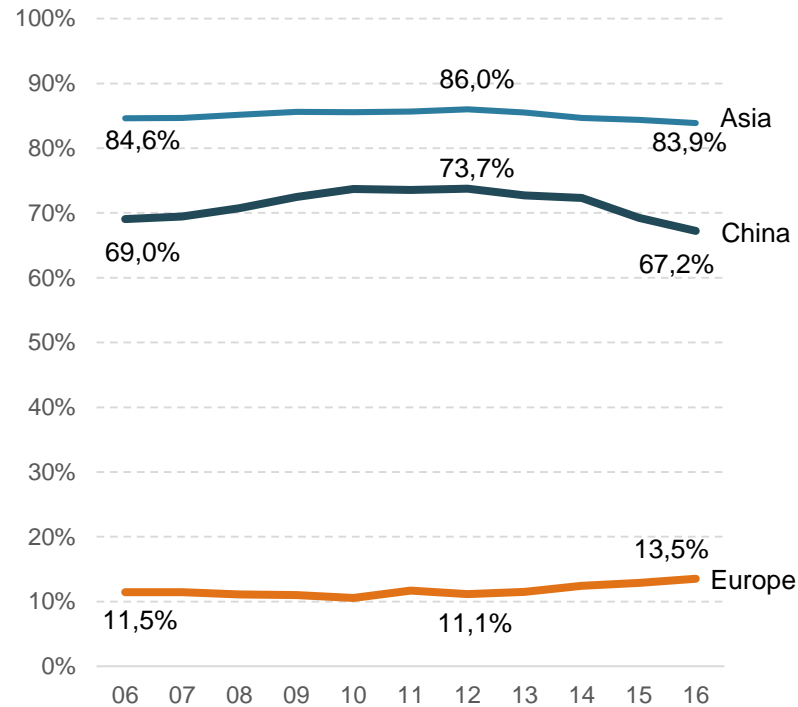


Country	Share (pairs)
China	67.3%
Vietnam	7.4%
Indonesia	1.9%
Germany	1.8%
Belgium	1.7%
India	1.7%
United Kingdom	1.6%
Turkey	1.5%
Italy	1.5%
Hong Kong	1.2%
TOP 10	87.6%

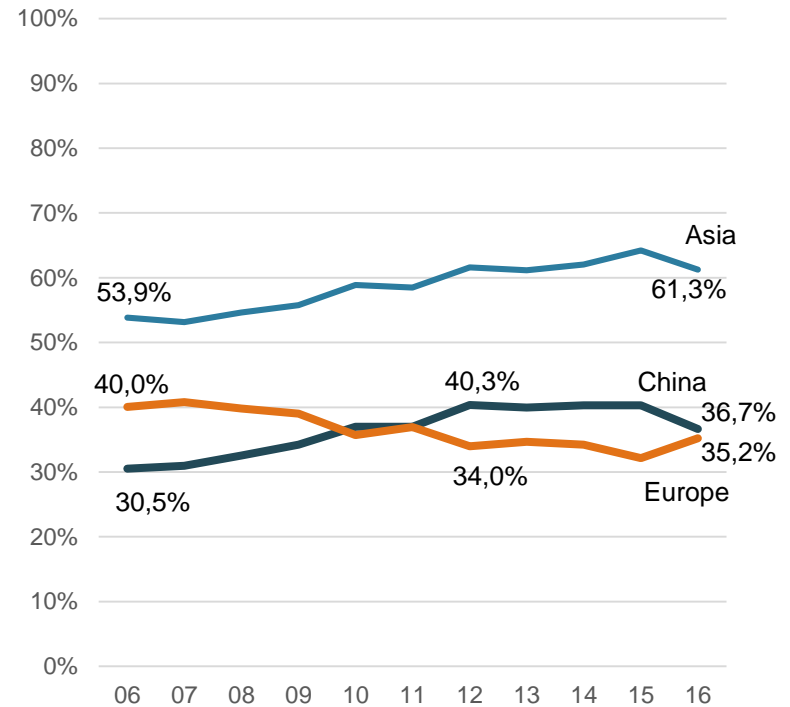


China lost 7 percentage points in 4 years

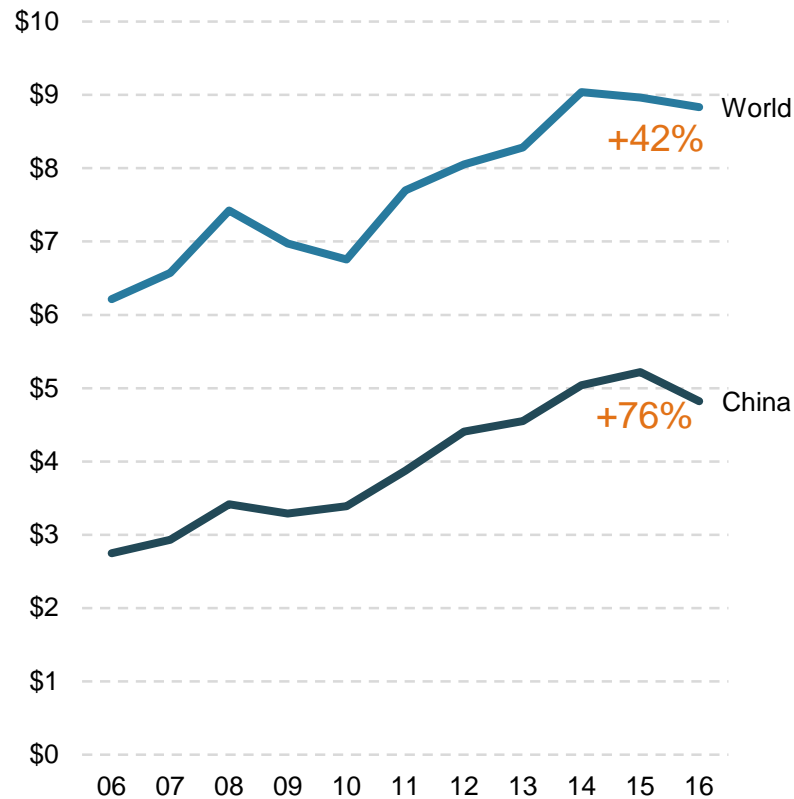
Pairs



Value



Average export price

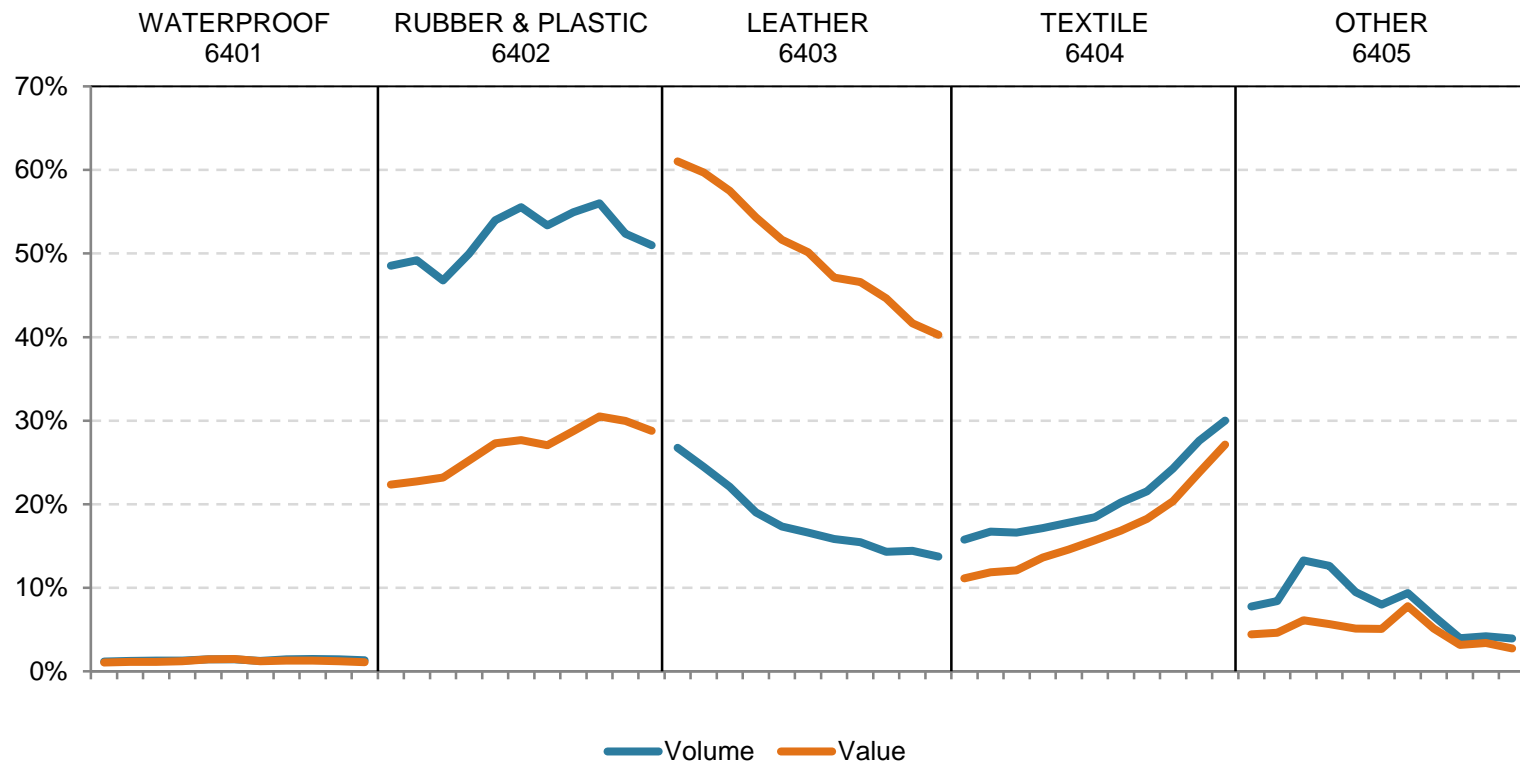


Average export price from China went up from 44% to 54% of world price, over the last decade



Exports by type of footwear

Leather losing ground to textile and rubber & plastic



TOP 10 markets

Country	% World Consumption (pairs)	% World Imports (dollars)	Import share of consumption	Average Import Price
China	18.3%	2.3%	2.2%	32.67
USA	10.8%	22.2%	102.3%	11.17
India	10.6%	0.4%	10.2%	1.98
Indonesia	4.1%	0.2%	2.7%	11.61
Brazil	4.0%	0.3%	2.7%	15.11
Japan	2.9%	4.4%	92.2%	8.49
UK	2.5%	5.6%	139.3%	8.83
Germany	2.1%	8.6%	149.4%	15.51
Russian Fed.	2.0%	2.3%	65.9%	9.67
France	1.9%	6.1%	120.8%	14.88

China is the largest market but imports little at a very high average price

The USA is the largest importer

India is as large a market as the USA but imports very little

European countries are large importers at relatively high prices



Largest variations 2011-2016

(million USD)

Exports

Country	Variation	% Var.
Vietnam	6 562	75%
China	5 512	14%
Belgium	1 823	44%
Indonesia	1 299	40%
France	827	34%
...		
Brazil	-298	-23%
Thailand	-308	-34%
Romania	-367	-26%
Italy	-550	-5%
Hong Kong	-2 552	-48%

Imports

Country	Variation	% Var.
USA	2 908	13%
China	1 450	112%
Belgium	1 408	57%
Germany	1 333	15%
Rep. of Korea	769	50%
...		
Venezuela	-325	-84%
Italy	-491	-9%
Panama	-751	-59%
Russian Fed.	-1 259	-32%
Hong Kong	-1 613	-33%

