
„Sustainable Textile and Leather Forum Budapest”

3rd December 2019

INNOVATIONS OF THE PORTUGUESE FOOTWEAR INDUSTRY

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INNOVATIONS OF THE PORTUGUESE FOOTWEAR INDUSTRY



Topics Outline

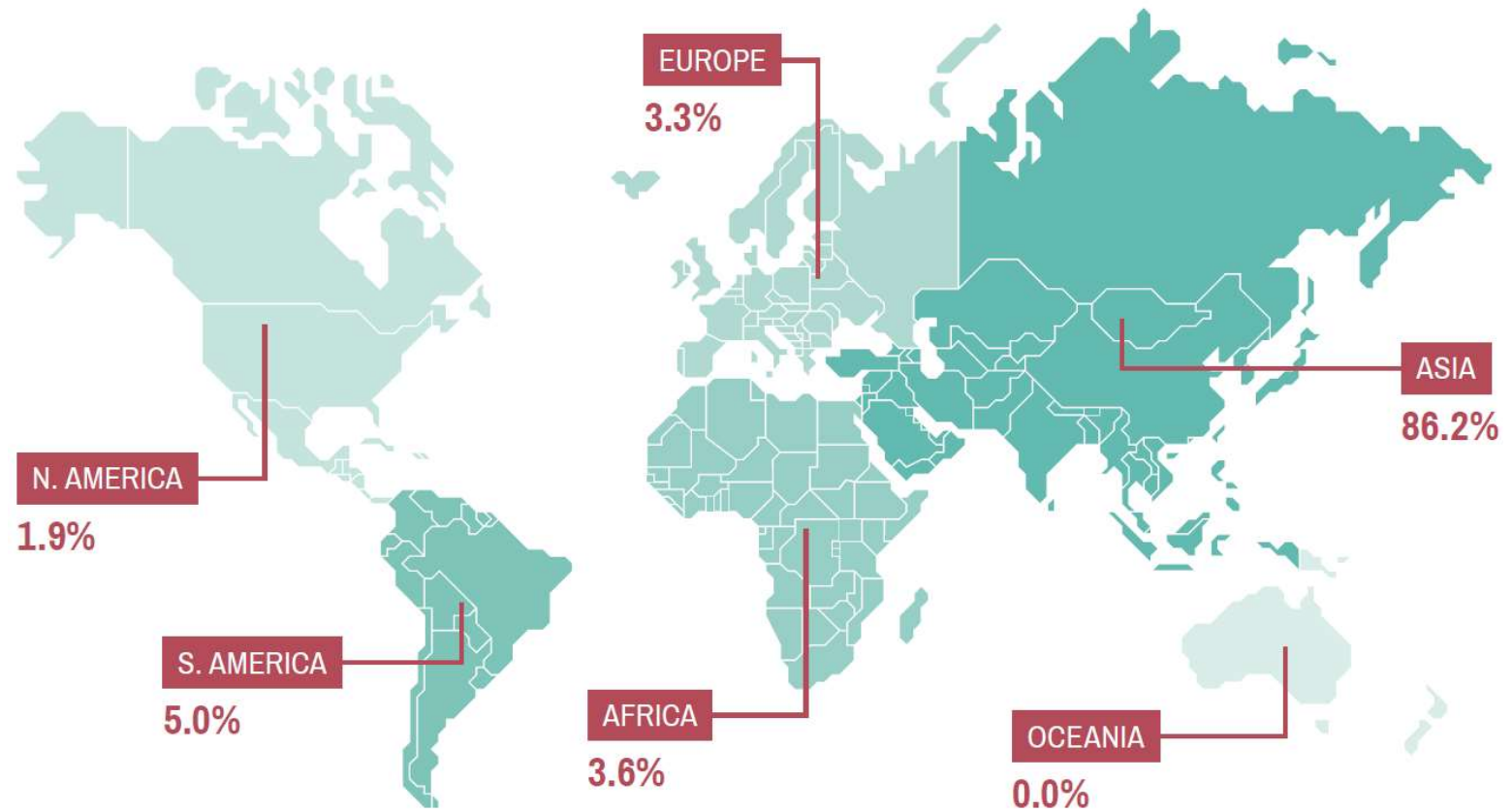
- Footwear sector worldwide
- Portuguese Footwear cluster
 - Footwear industry
- Portuguese Footwear strategic Plan
- What companies do in innovation
- What companies do in Sustainability



Footwear Worldwide

PRODUCTION

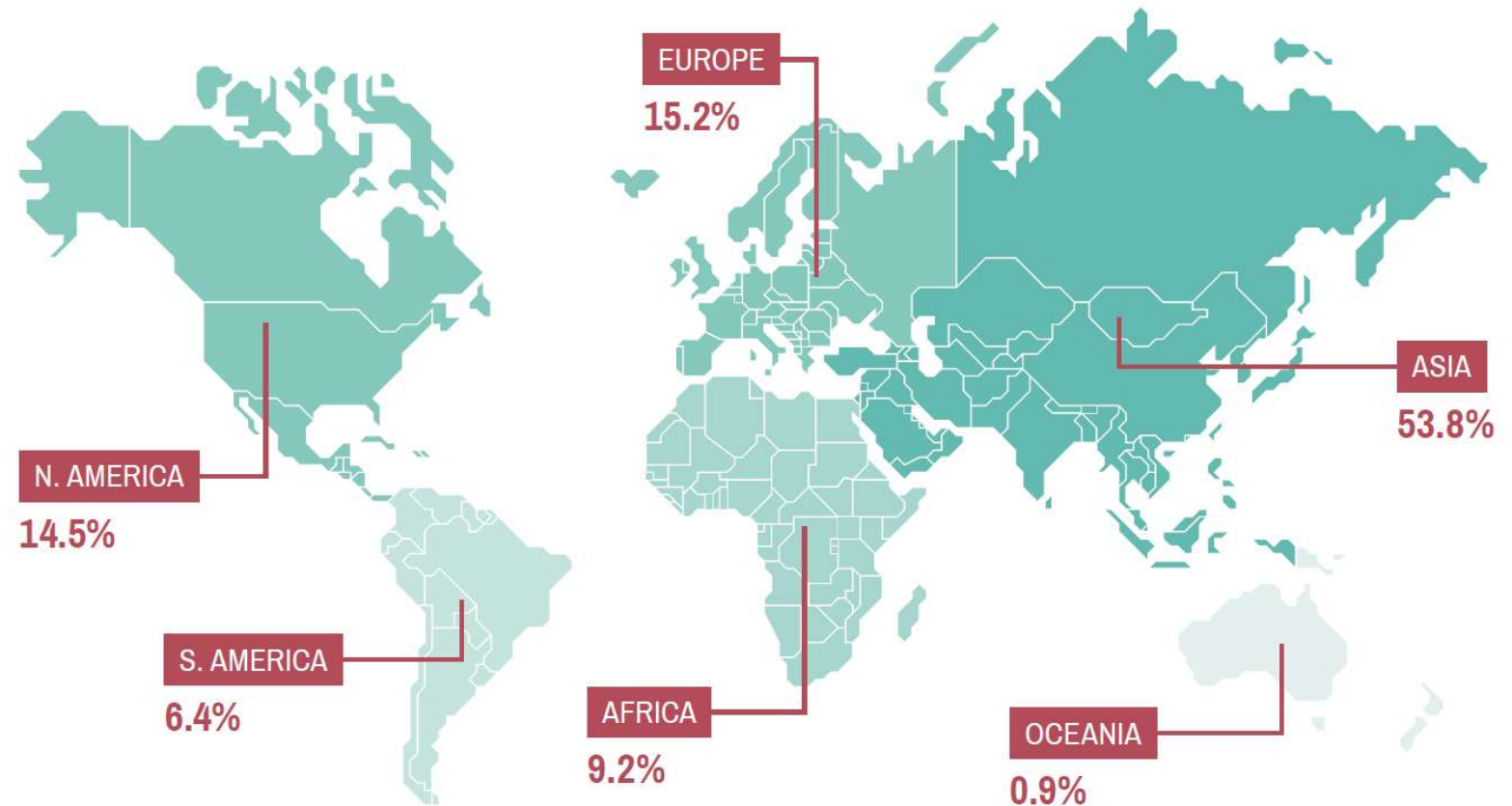
24,2 billion pairs of shoes
3,1 pairs of shoes for each
person on earth



Footwear Worldwide

CONSUMPTION

From 5,6 pairs per capita in
North America to 1,7 in
Africa



Portuguese Footwear Cluster

3 dynamic subsectors

1 865 companies

40 755 workers

Innovation conciliates
**state-of-the-art
technology, tradition
and know-how**
accumulated over
several generations



FOOTWEAR



LEATHER GOODS



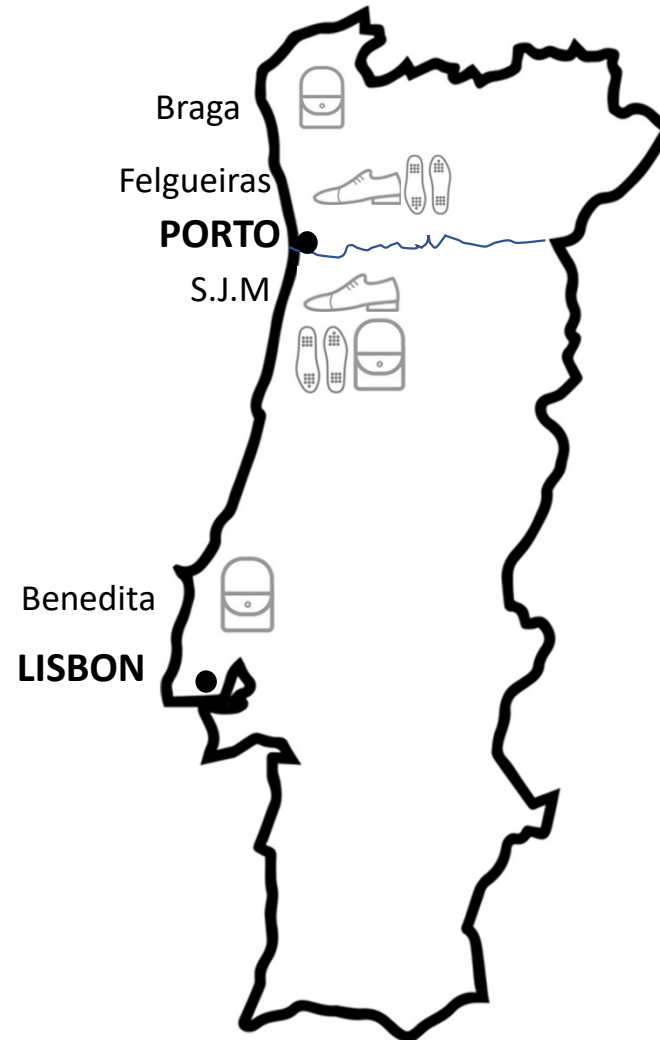
COMPONENTS

Companies	1 476	120	269
Employment	39 602	1 871	5 514
Exportations	2 257 000	154 013	51 435
M USD			

Source: Monografia APICCAPS 2018

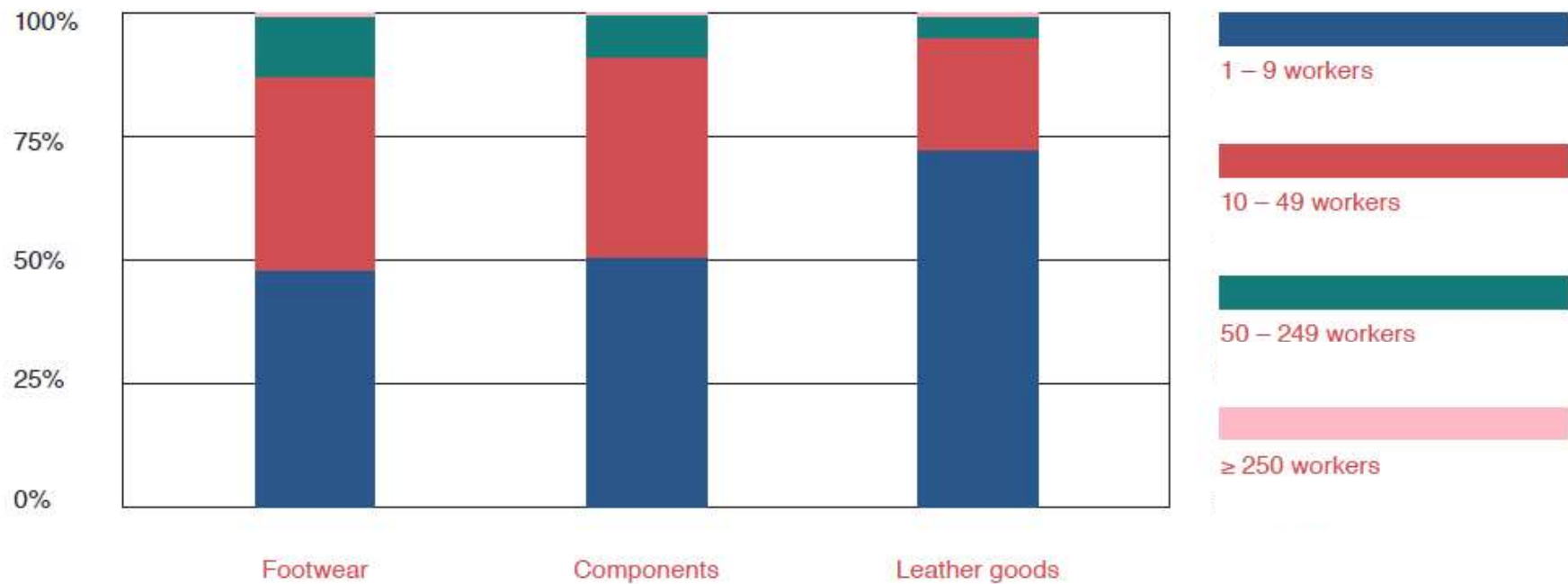
Portuguese Footwear Cluster

The footwear cluster is based
around two locations, north and
south of Douro River



Portuguese Footwear Cluster

Size of the
footwear cluster
companies
95% SMEs



Portuguese Footwear Cluster

APICCAPS

Associação Portuguesa dos Industriais de Calçado,
Componentes e Artigos de Pele e seus Sucedâneos

SECTORAL ORGANIZATION



www.ctcp.pt

Portuguese Footwear Cluster



Associação Portuguesa dos Industriais de Calçado,
Componentes e Artigos de Pele e seus Sucedâneos

www.apiccaps.pt/

APICCAPS – Portuguese Footwear, Components, Leather Goods Manufacturers’ Association - is a nation-wide association based in Porto, founded in 1975, with 700 members, representing the footwear, components, leather goods and other related sectors.

Main Areas of Action:

- Internationalization, participation in fairs, missions and promotional campaigns
- Studies, Projects and Consulting
- Business intelligence
- National Labour Agreement
- Social responsibility

Portuguese Footwear Cluster



www.ctcp.pt/

Private non profit organization, founded in 1986 by the partners
APICCAPS, IAPMEI and INETI

48 employees

More than 500 members

30 years supporting footwear cluster

Portuguese Footwear Cluster



Laboratory
tests



R&D&I



Investment
projects



Health &
Security



Product
certification



Training
Qualification



Consultancy
Management
systems



Industrial
Property



Design
Multimedia
Software



Information
Communication

CTCP's main

areas of work:

SHOEFABLAB – to shape ideas

<https://www.ctcp.pt/shoefablab/>

Focused on **co-creation**, **training**, learn by doing, innovation and acceleration of ideas, products and business.

Work model based on sharing knowledge, space and resources, following the Do-It-Yourself principle, accompanied by trainers / coaches

Where anyone with n idea has access to resources and skills to support the realization and development of individual and company projects.



Shoe FabLab: Onde as ideias ganham forma



SHOE FABLAB

Onde as ideias ganham forma.



Portuguese Footwear Cluster



www.cfpic.pt

Public training entity, commissioned by the National Employment and Training Institute, which from 1966 provides technical vocational training for the economic development of the country.

They run institutional courses aiming at developing skills and knowledge of human resources in the footwear industry, promoting professional and school qualification.

Portuguese Footwear Industry

**The “Sexiest Industry
in Europe”**

<https://www.portugueseshoes.pt/>



Portuguese Footwear Industry

Portugal (92.225 km² & 10M inhabitants) **is the 8th largest exporter of Leather Footwear and positions among the world's leading exporters of Fashion Footwear, claiming to have the “Sexiest Industry in Europe”**



Portuguese Footwear Industry

FOOTWEAR INDUSTRY	VALUE		QUANTITY		PRICE
	Million	World	Million	World	USD
	USD	Rank	Pairs	Rank	
	EXPORTS	2 257	13	84	19
	IMPORTS	756	29	66	45
PRODUCTION			80	21	
CONSUMPTION			62	54	

AN INDUSTRY OPEN TO THE WORLD

Direct exportations to 165
different countries

Participation in 60 fairs per year



Portuguese Footwear Industry

MAIN TRADING PARTNERS (EXPORTS)

EXPORT MARKETS	Million USD	Value Share	Million Pairs	Quantity Share	LAST 5 YEARS VARIATION		Million USD
France	470	21%	14.9	18%	+	USA	133% 48
Germany	416	18%	14.0	17%	+	Denmark	41% 35
Netherlands	317	14%	10.2	12%	-	U. Kingdom	-14% -23
Spain	210	9%	17.4	21%	-	Russian Fed.	-50% -32
U. Kingdom	145	6%	5.1	6%	-	France	-17% -96

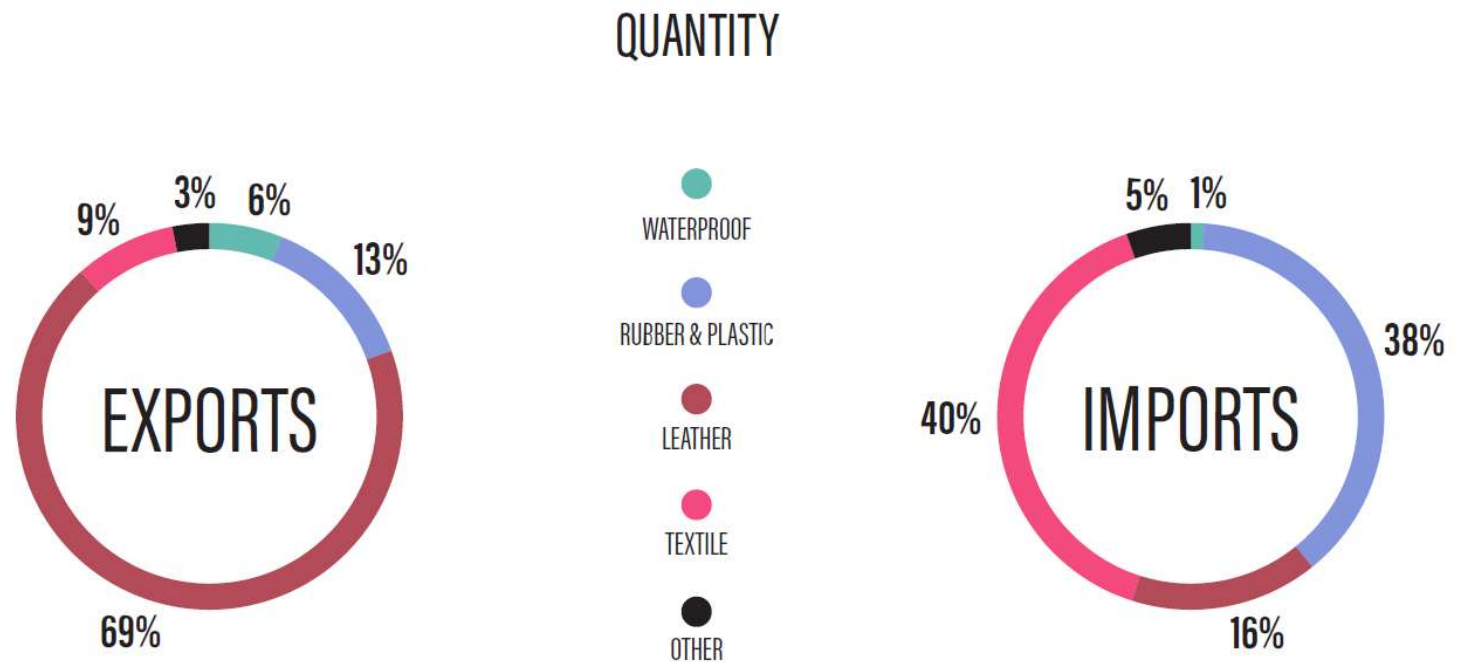
Portuguese Footwear Industry

MAIN TRADING PARTNERS (IMPORTS)

IMPORT MARKETS	Million USD	Value Share	Million Pairs	Quantity Share	LAST 5 YEARS VARIATION			Million USD
Spain	275	36%	21.2	32%	+	China	107%	50
China	97	13%	23.6	36%	+	Germany	220%	35
Belgium	82	11%	2.8	4%	+	France	81%	30
France	67	9%	4.4	7%	+	Belgium	51%	28
Italy	60	8%	2.3	4%	+	U. Kingdom	424%	19

Portuguese Footwear Industry

TYPES OF TRADED FOOTWEAR



Source: Worldfootwear 2019

Portuguese Footwear Industry

TOP 10 EXPORTERS OF LEATHER FOOTWEAR

COUNTRY	\$ (MILLIONS)	WORLD SHARE	PAIRS (MILLIONS)	WORLD SHARE	AVERAGE PRICE
CHINA	654	41.4%	109	53.0%	\$5.97
ITALY	133	8.4%	14	6.6%	\$9.65
FRANCE	71	4.5%	5	2.6%	\$13.27
NETHERLANDS	61	3.9%	3	1.6%	\$18.76
PORTUGAL	47	3.0%	5	2.5%	\$9.03
HONG KONG	42	2.6%	2	1.0%	\$20.94
GERMANY	40	2.5%	3	1.4%	\$14.16
CANADA	32	2.0%	3	1.3%	\$11.90
UK	30	1.9%	1	0.7%	\$20.34
BELGIUM	29	1.8%	2	0.7%	\$19.03

TOP 10 EXPORTERS OF WATERPROOF FOOTWEAR

COUNTRY	\$ (MILLIONS)	WORLD SHARE	PAIRS (MILLIONS)	WORLD SHARE	AVERAGE PRICE
CHINA	9 079	16.5%	644	30.2%	\$14.10
ITALY	8 104	14.7%	110	5.2%	\$73.62
VIETNAM	6 421	11.7%	294	13.8%	\$21.83
GERMANY	3 662	6.6%	89	4.2%	\$41.13
INDONESIA	2 552	4.6%	131	6.1%	\$19.55
FRANCE	2 048	3.7%	28	1.3%	\$73.60
BELGIUM	2 012	3.7%	59	2.7%	\$34.30
PORTUGAL	1 981	3.6%	58	2.7%	\$34.09
INDIA	1 943	3.5%	127	5.9%	\$15.36
NETHERLANDS	1 830	3.3%	48	2.2%	\$38.15

Portuguese Footwear Industry

**A GROUNDBREAKING
INDUSTRY**

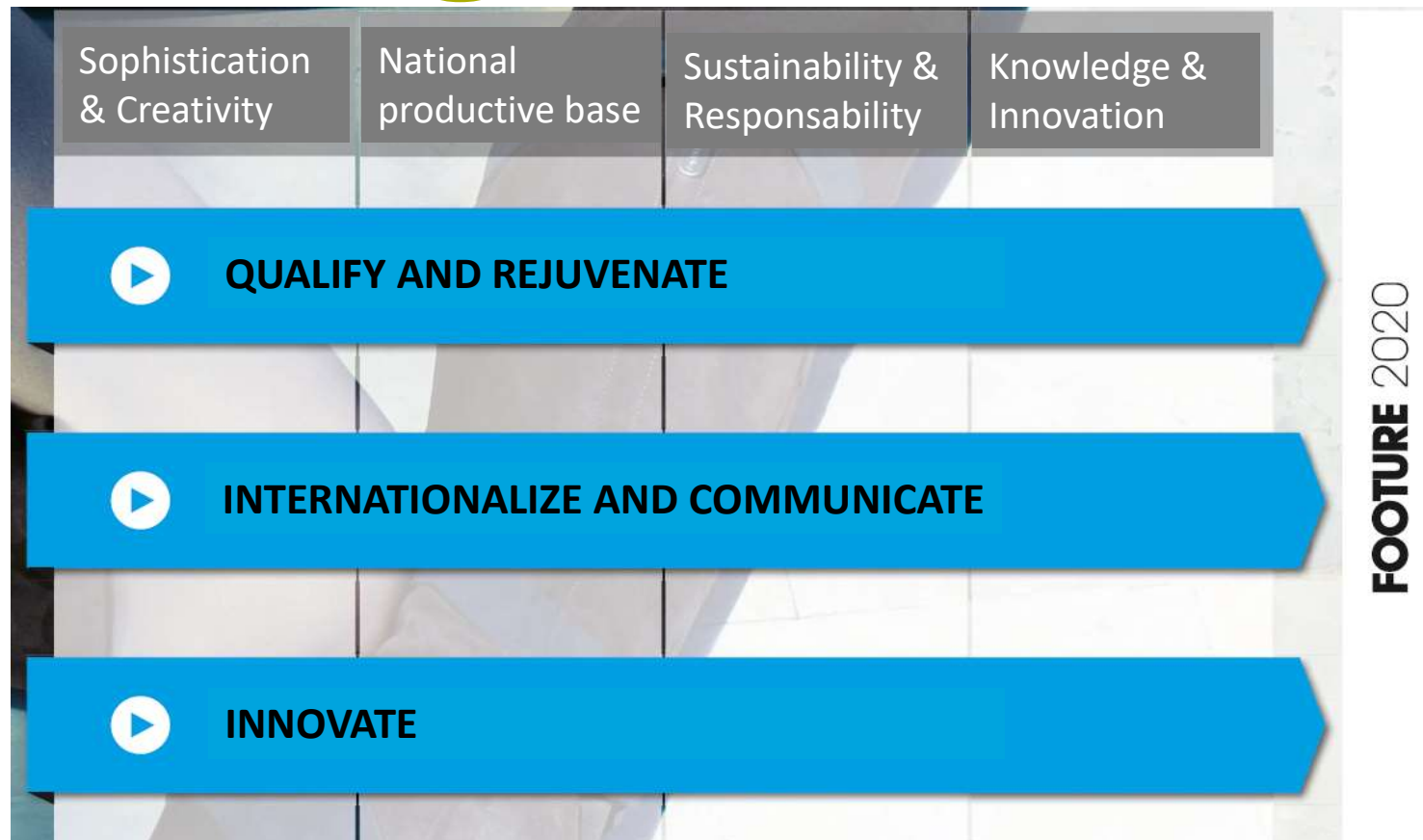
World technology
leader
DESIGN
Small series
Quick response
QUALITY
innovation
FLEXIBILITY

Footwear Portuguese Strategic Plan 2020



Source: APICCAPS

Footwear Portuguese Strategic Plan 2020



Source: Footure 2020

QUALIFICATION

- Attract qualified young people to modern production processes
- Qualify top managers
- Strengthen cluster design skills
- Boost entrepreneurship
- Increase Business Intelligence



INTERNATIONALIZATION / COMMUNICATION

- Collective Image Campaign
- Value chain internationalization
- Business Image and Reputation Upgrade
 - participation in fairs and missions



INTERNATIONALIZATION / COMMUNICATION

Since 2010 more 238 new Footwear brands were registered

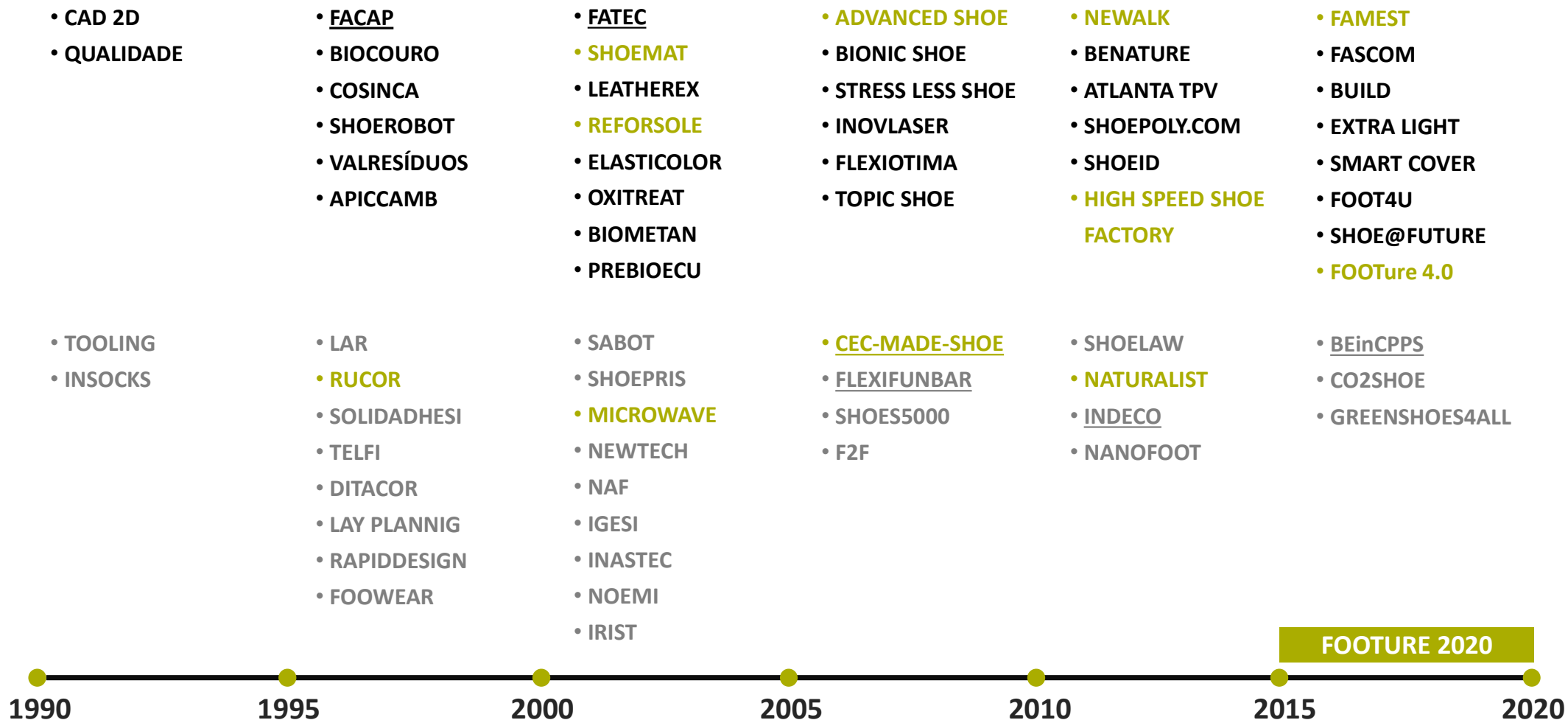
- 178 are community brands
- Only 60 were registered in Portugal
- Exportation directly to 163 countries
- Presence in more than 60 fairs in 20 different countries



INNOVATION

- New materials and components
- New products and design to respond to new market segments, with special demands in terms of health, demographic change and well-being, safety, sustainability
- New technology (equipment and processes) that reinforce productive flexibility
- Investment in information and communication and e-commerce solutions.
- Sustainable and responsible development reducing environmental impact and optimizing energy efficiency

R&D&I



INNOVATION

High-speed Shoe Factory

- A new concept of footwear shop floor for a quick response in 24 hours
- An organizational model in a exclusive production flow, instead of the traditional production rooms/section
- Based on automatized integrated distribution systems, automatized cutting, and online control of the products and processes flows
- The logic is “the unique production section” of total flexibility and polyvalence

Impact:

- Enable the production of one pair of shoes of each model
- Enable the response to online sales without t stocks
- Enable to answer to very small orders and repetitions
- Enables the quick production of samples and tests for new collections



Source: ctcp

INNOVATION

FOOTure 4.0

- Creation of new ways of interaction with costumers, in a digital concept and in networking
- Increase flexibility
- Reduce lead-time
- Business intelligence
- Sustainability



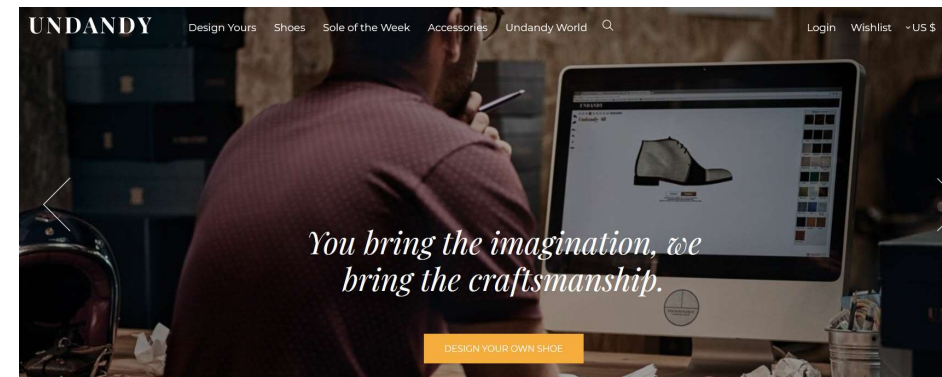
INNOVATION

Personalization

UNDANDY – DESIGN YOUR OWN SHOES

www.undandy.com

- Portuguese made-to-order online shoe company
- Offers a set of shoe models (classic, sneakers...) and a set of options for each component, thus a huge number of combinations



Source: www.undandy.com

INNOVATION

Personalization

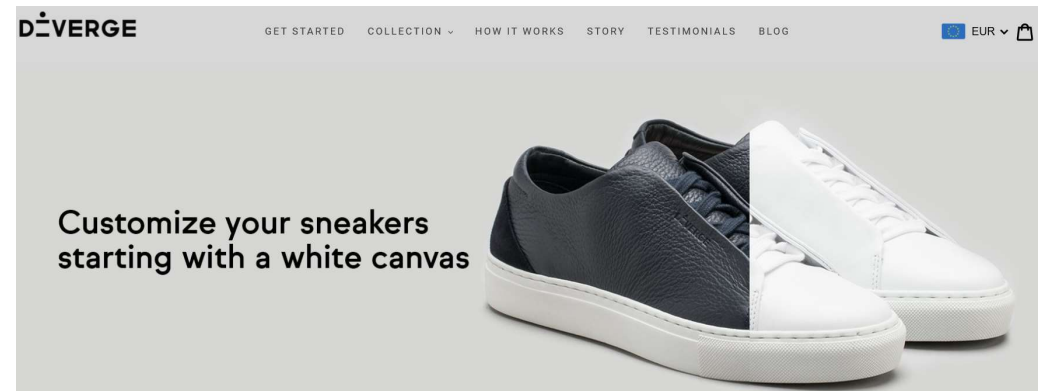
DIVERGE – MAKE YOUR OWN TRACK

www.diverge-sneakers.com

Not a book, not a movie – a new brand that privilege the personalization creating exclusive and unique products.

Top quality materials pretend to change the sneakers' market.

The idea is to “help the consumer to express his/her own individuality and exclusivity, make them feel special and combine totally with their own style. Possible to create online a sneaker totally from the scratch, or follow suggestions available and option that the brand offers. The brand offers hundred of options.



Source: www.diverge-sneakers.com

INNOVATION

Different sectors' alliances - Footwear & Jewelry alliance

HAGGUA ORIGINAL CONCEPT www.haggua.pt

Luxury brand that allies footwear to jewellery, a unique and sophisticated project that allies 2 sector growing in Portugal.

Betting in timeless models with rich adornments HAGGUA brings a new concept not only in terms of the product and production but also packaging and delivering – the way the shoes arrive to the costumer – a black velvet filled box with a metallic support to exhibit the product, like a jewel box.



Source: www.haggua.pt

INNOVATION

Different sectors' alliances - Designer+AmorimCorkVentures+Kyaia

ASPORTUGUESAS asportuguesas.shoes/
UNIQUELY SUSTAINABLE

New sustainable concept flip-flop made of cork

Irreverent design + 100% natural material

McNamara was invited to design a solidary line of products



Source: asportuguesas.shoes

INNOVATION

STORYTELLING

BELCINTO – PRODUCTS THAT TELL STORIES

belcinto.com/

Charlie, Our First Travel Bag - Born in 1989, Charlie was made by the hands of skilled craftsman to be robust, durable & trustworthy. Made to last and resist. Charlie has seen all the continents and oceans with his owner, Andy.

<https://www.portugueseshoes.pt/portugueseshoestv-play/a-step-to-sustainability/3838/12.html?play=yes&pagina=1#play3838>



INNOVATION

LUIS ONOFRE – RESPONSIBLE LUXURY

<https://luisonofre.com/>

A timeless quality elegant product.

Allies obsession for design and passion for the perfect detail. Combines luxury materials and unexpected textures. Adopts sustainable practices regarding transparency and traceability of materials origin



INNOVATION

Multichannel – hybrid experience of buying shoes

Overcube <https://overcube.com/>

Footwear and accessories sales combining online and physical shop. Connections to the manufacturing sector. Offers an hybrid experience to their costumers, combining traditional retailing and convenient online purchases.



Source CTCP newsletter



FEETIN 4.0

Workplace Inclusion in the Digital Era
for Footwear Sector across Europe

**Technology is already there. i4.0 is about people.
To make the most of the i4.0 opportunities for footwear SMEs**

www.feetin40.eu



Co-funded by the
Erasmus+ Programme
of the European Union

SUSTAINABILITY



SUSTAINABILITY

XUZ <https://xuz.com.pt/>

NEW LIFE TO THE WASTES

XUZ (Footwear) + GRALHAS (clothes)

Limited collection of 11 dresses with leather and textile wastes



Source: xuz.com.pt

FW19

MANIFESTO - FAIR FASHION

// LOCAL PRODUCTION

// RESPECT FOR WORKERS

// PRODUCTION ON DEMAND, LESS WASTE

// CONSCIOUS CONSUMPTION

SUSTAINABILITY

SOFTWAVES softwaves.pt/

Lauches GREEN EDITION – new sustainable concept for the “vegan” niche



SUSTAINABILITY



Cork is a 100% natural raw material, that is 100% reusable and 100% recyclable

<https://rutz.pt/>



SUSTAINABILITY



From the ocean to your feet.

Eco-vegan footwear brand that uses plastic trash from the Portuguese coast together with ecologic and sustainable materials.

<https://www.zouri-shoes.com/>



Source: www.zouri-shoes.com

SUSTAINABILITY

LEMON JELLY www.lemonjelly.com

WasteLess Act

Shoes that smell lemon, approved
by PETA, made with wastes.

Recycled & Recyclable



SUSTAINABILITY

BALLUTA Shoes <https://balluta-shoes.com>

Luxury Vegan brand inspired in art, human body and nature.

**No animal exploitation materials only.
Microfibers, wood, cork....algae**

Seasonless models: sandals for Winter and boots for Summer.

**Helsinki Fashion Week
In 2020- will incorporate apple fibers**



SUSTAINABILITY



Eco-vegan footwear brand that uses plastic trash from the Portuguese coast together with ecologic and sustainable materials.

www.nae-vegan.com



Source: www.nae-vegan.com



No, fast fashion.
I **don't** want you
anymore.

[@NAEVEGANSHOES](https://www.instagram.com/naeveganshoes)

SUSTAINABILITY

MARITA MORENO
maritamoreno.com/

Sustainable, Vegan, Ethical – key words of new Footwear products that use endogeneous and local materials such as cork.

Tech-textil Innovation Award 2019 –
New materials category



MARITA
MORENO

“Marca,
Sustentabilidade e
Negócio”

MARCA VENCEDORA

MO
MAD

SUSTAINABILITY

BOLFLEX

<https://bolflex.pt/>

**Nothing is lost, everything
is transformed**

**Circular Economy Excelled
Imagine a sole made of
recycled shoes – SH-Rouber**



Source: bolflex.pt

SUSTAINABILITY

ISI SOLES www.isisoles.com/

Sustainability - MAKE IT ISI

1st company to be certified by
ISO14001 and 9001

1st to be recognized at
international level for its
environmental practices

Biodegradable TPU
TPU bio based
Sustainable VEGAN



SUSTAINABILITY

FOOTWEAR CLUSTER PLAN ACTION FOR SUSTAINABILITY

The initiative pretends to create a structured sectorial thinking toward SUSTAINABILITY and what the companies can and should do to implement best practices at international level

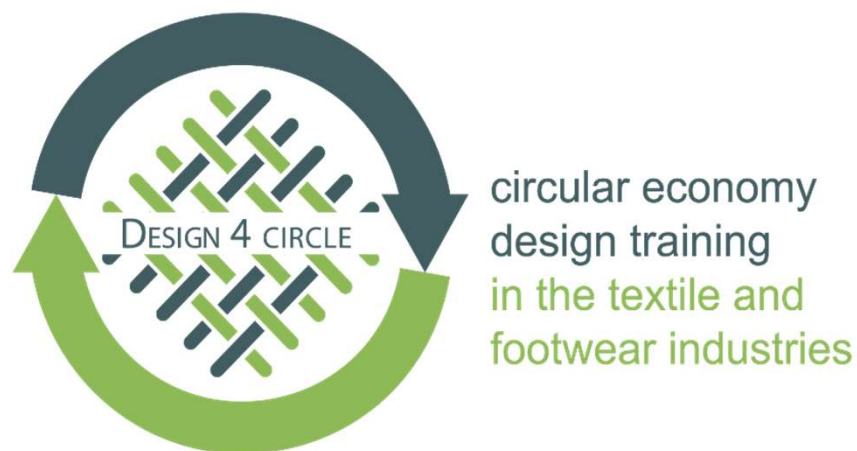


Programme
Key action
Action
Grant agreement No.

Erasmus+
Cooperation for innovation and the exchange of good practices
Strategic Partnerships for vocational education and training
2018-1-LV01-KA202-046977



Co-funded by the
Erasmus+ Programme
of the European Union



Innovative design practices for achieving a new textile circular sector

Aims to cover the skill gaps in eco-innovation of European Designers in textile and fashion products. Design4Circle will allow designers from the fashion sectors to reduce environmental impact during the products life-cycle, and develop new and innovative businesses within the principles of circular economy.

<https://design4circle.eu/>

CENTRO TECNOLÓGICO DO CALÇADO DE PORTUGAL

Since 1986 supporting Footwear cluster

www.ctcp.pt

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