

THE PORTUGUESE FOOTWEAR INDUSTRY

Where there is a will, there is a way
Alberto Castro

The recent history told as if it were a script for a musical

“I (We) WILL survive”

The Way



**A
Strategy**

**A Plan of
Action**

“You’ll never walk alone”

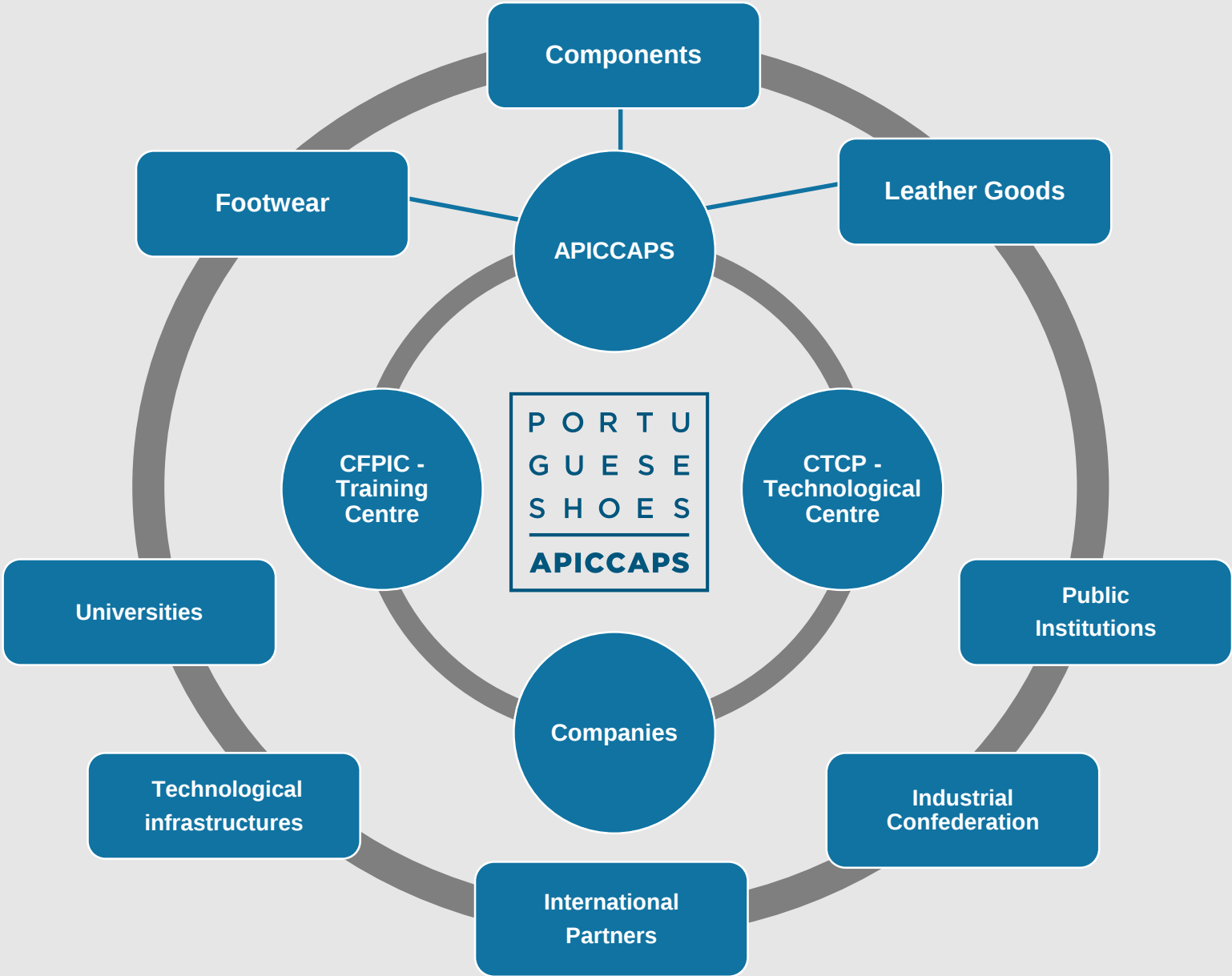
- One size doesn’t fit all
- A role for every company **IF**

AN ATTITUDE: It takes two to tango

It takes two to tango

- Building trust
- Deliver
- Value for money

“The Ballroom” Sectorial Network



A(n evolving) plan



“We shall overcome”

“Safety in numbers”

Move ahead, stay behind, make advances, crawl and climb
Immediate satisfaction, a long laid plan of action

Strategy

Strategy

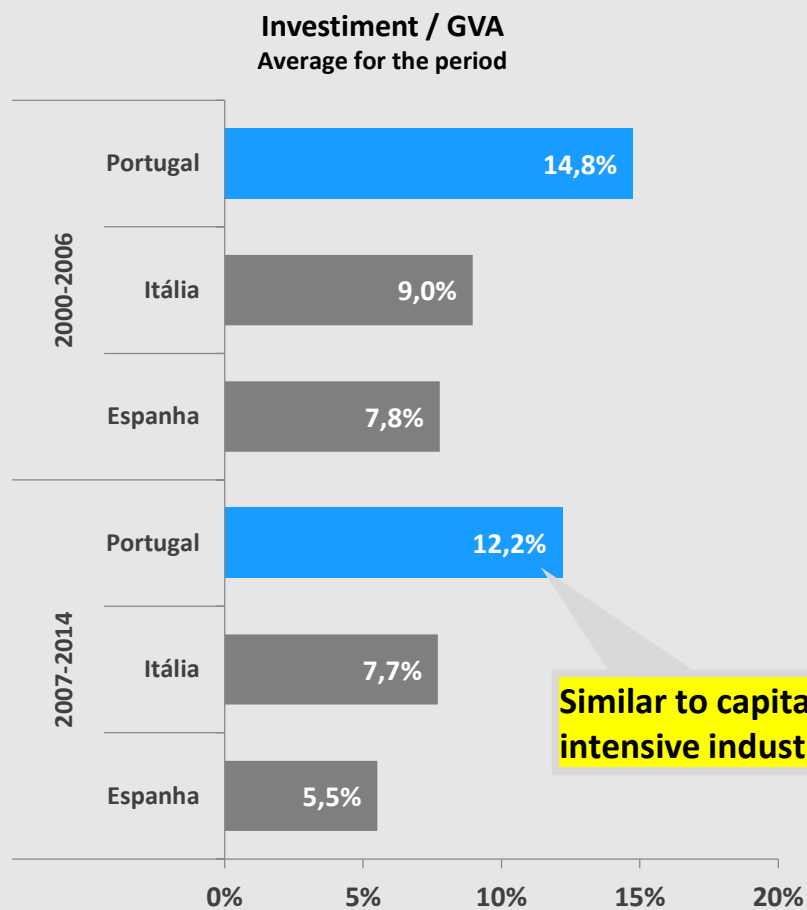
Strategy

Strategy

Ah, where's the safety in numbers?

Ah, where's the safety in numbers?

Investiment



Fonte: Eurostat

Investimentos e incentivos PRIME Footwear

2000-2007
Million euros

Tipologia de Projetos	N.º Projetos	Investimento	Incentivo	Distribuição Calçado	Distribuição Total PRIME
Empresariais ¹⁾	80	31.0	13.2	23%	56%
I&DI ²⁾	17	14.4	8.4	15%	11%
Internacionalização (PIP)	8	36.6	27.3	49%	5%
Outros da envolvente	15	10.3	6.4	12%	28%
TOTAL	120	92.3	55.3	100%	100%

1) SIME, SIPIE, SIME Internacional, SIED, Proj. Aut. Formação Profissional

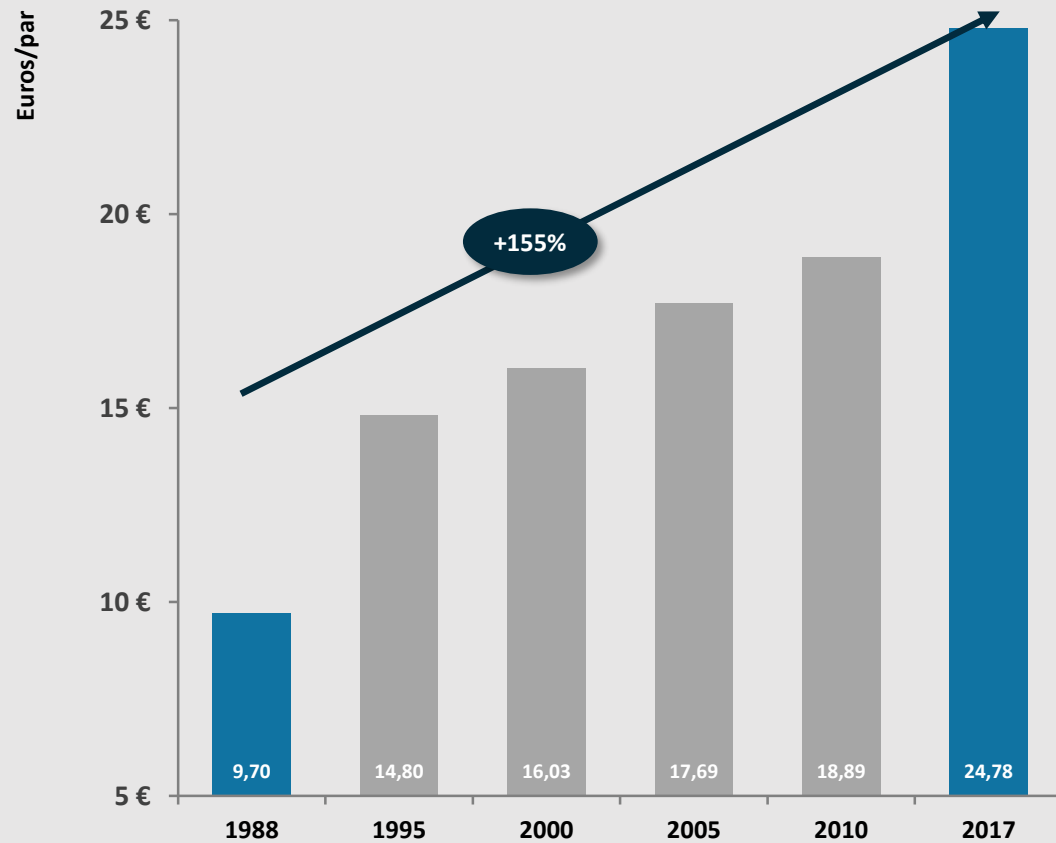
2) Proj. Mobilizadores, IDEIA, NITEC, DEMTEC, Inov-Jovem

On average 8.8 cents per pair exported.

Source: APICCAPS, Relatório Execução PRIME

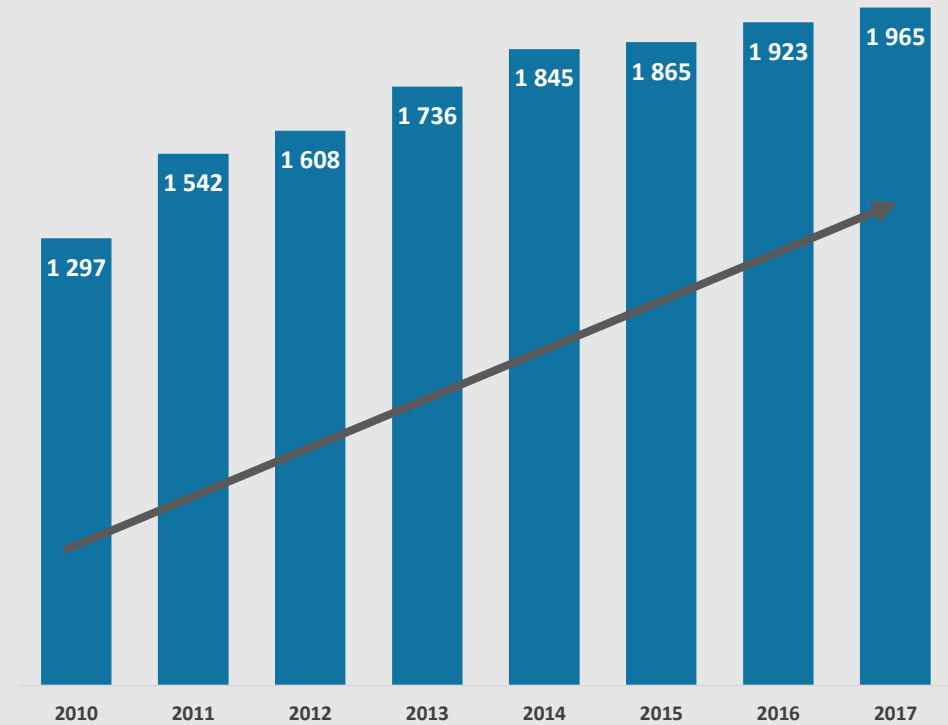
Portugal

Average Export Prices EUROS

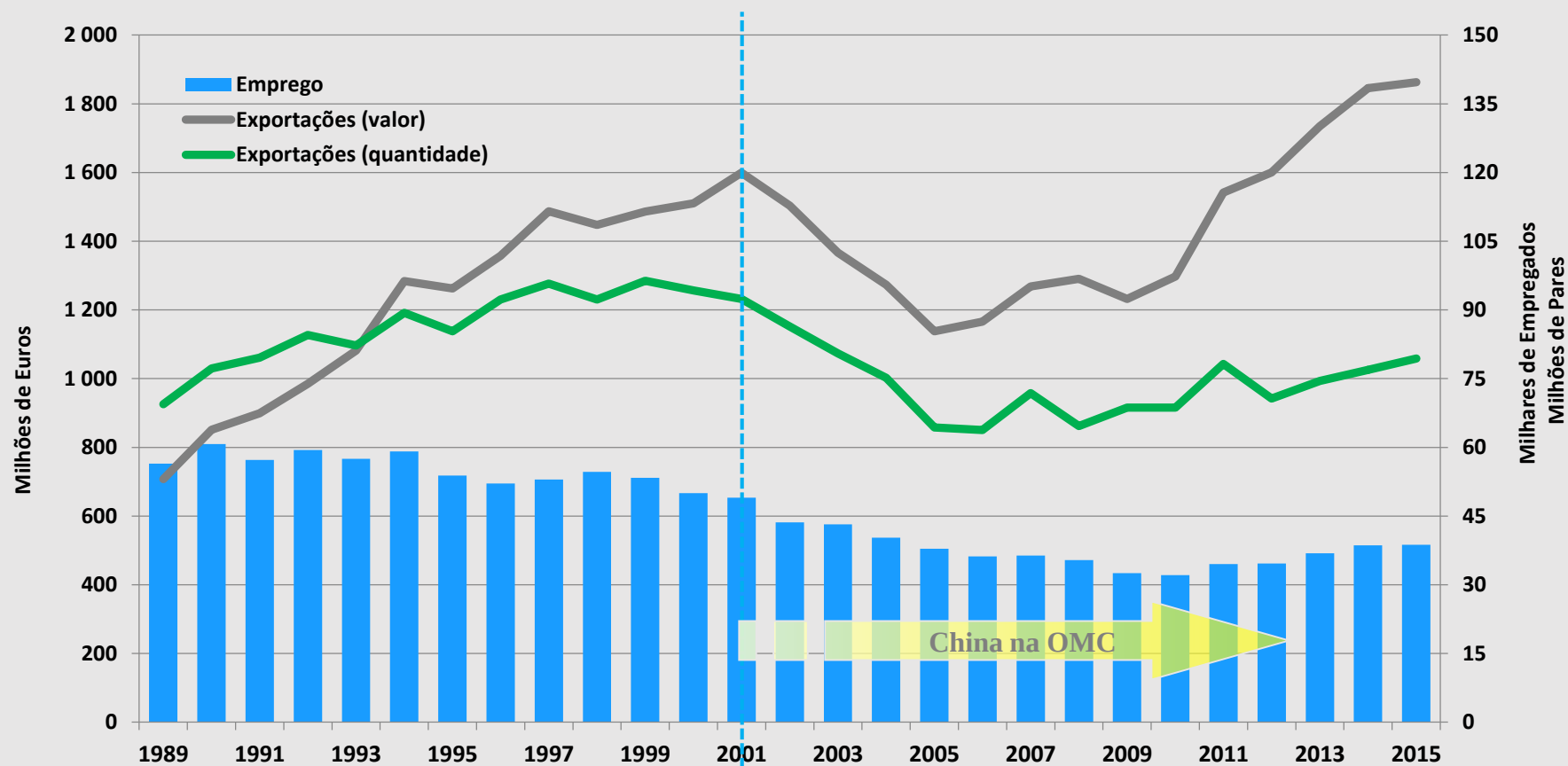


Evolution of Portuguese Footwear Exports 2010-2017 Million Euros

+52%



Exportação e Emprego Calçado - Portugal



1960 EFTA	1972 Acordo de Comércio Livre: Portugal-CEE	1986 Adesão à CEE	1989 Queda do Muro de Berlim	1994 Uruguay Round OMC	1995 Início do FACAP – Fábrica de Calçado do Futuro	1999 Criação do Euro	2008 Início da crise financeira internacional
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Fonte: INE, APICCAPS

2017

1 526
COMPANIES

TECNOLOGICAL
LEADERSHIP

40 080
WORKERS

83
M. PAIRS
EXPORTED

95%
EXPORT
ORIENTED

P O R T U
G U E S E
S H O E S

A P I C C A P S

1 342
TRADE
BALANCE
(M. EUROS)

150
MARKETS
WORLDWIDE

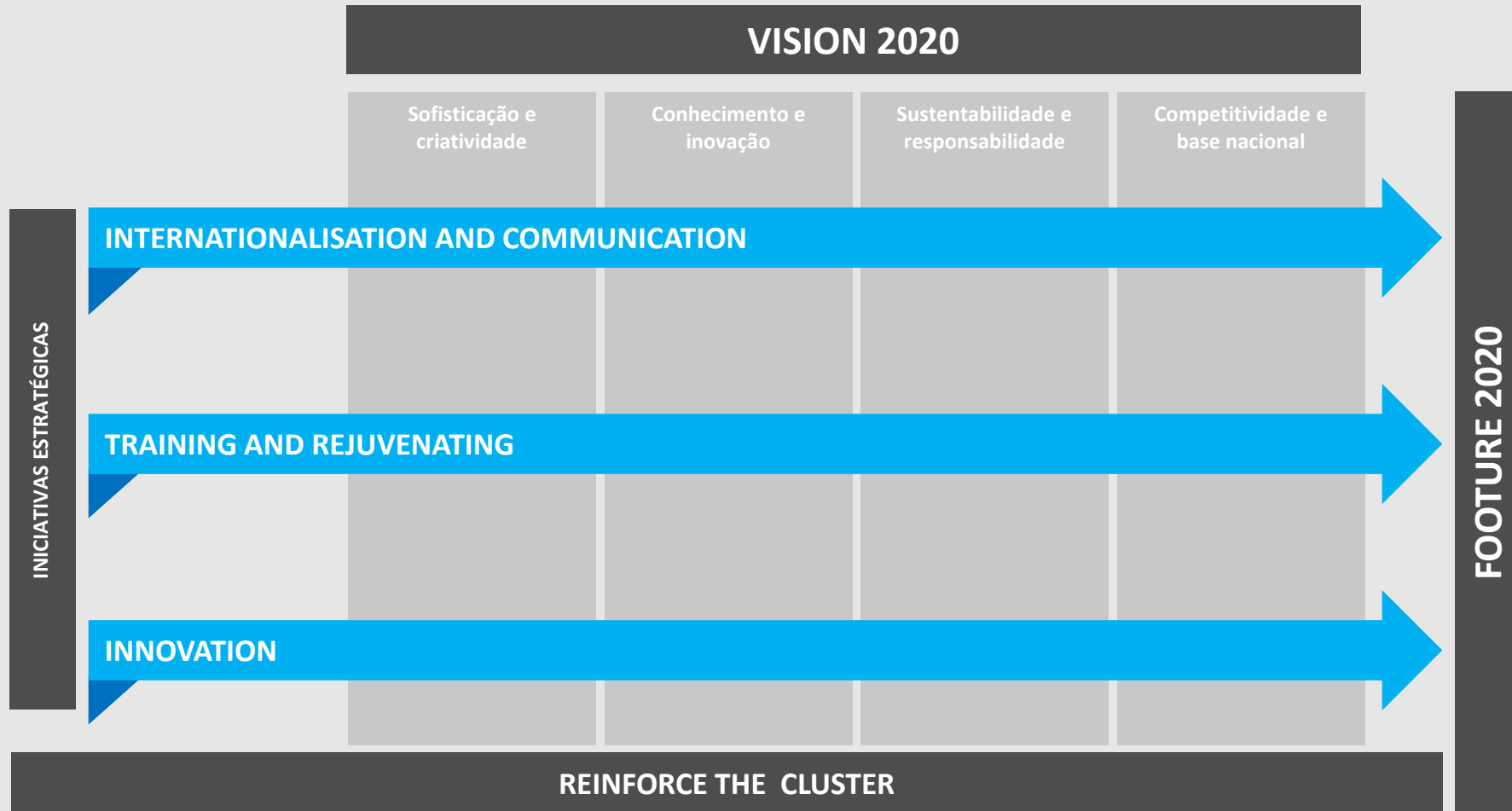
600
FAIRS
PARTICIPATIONS

+350
NEW BRANDS
2009-2017

2°
WORLD
AVERAGE
EXPORT
PRICE

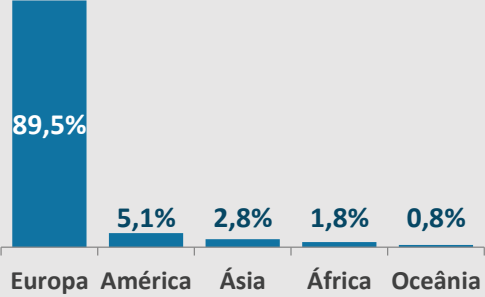
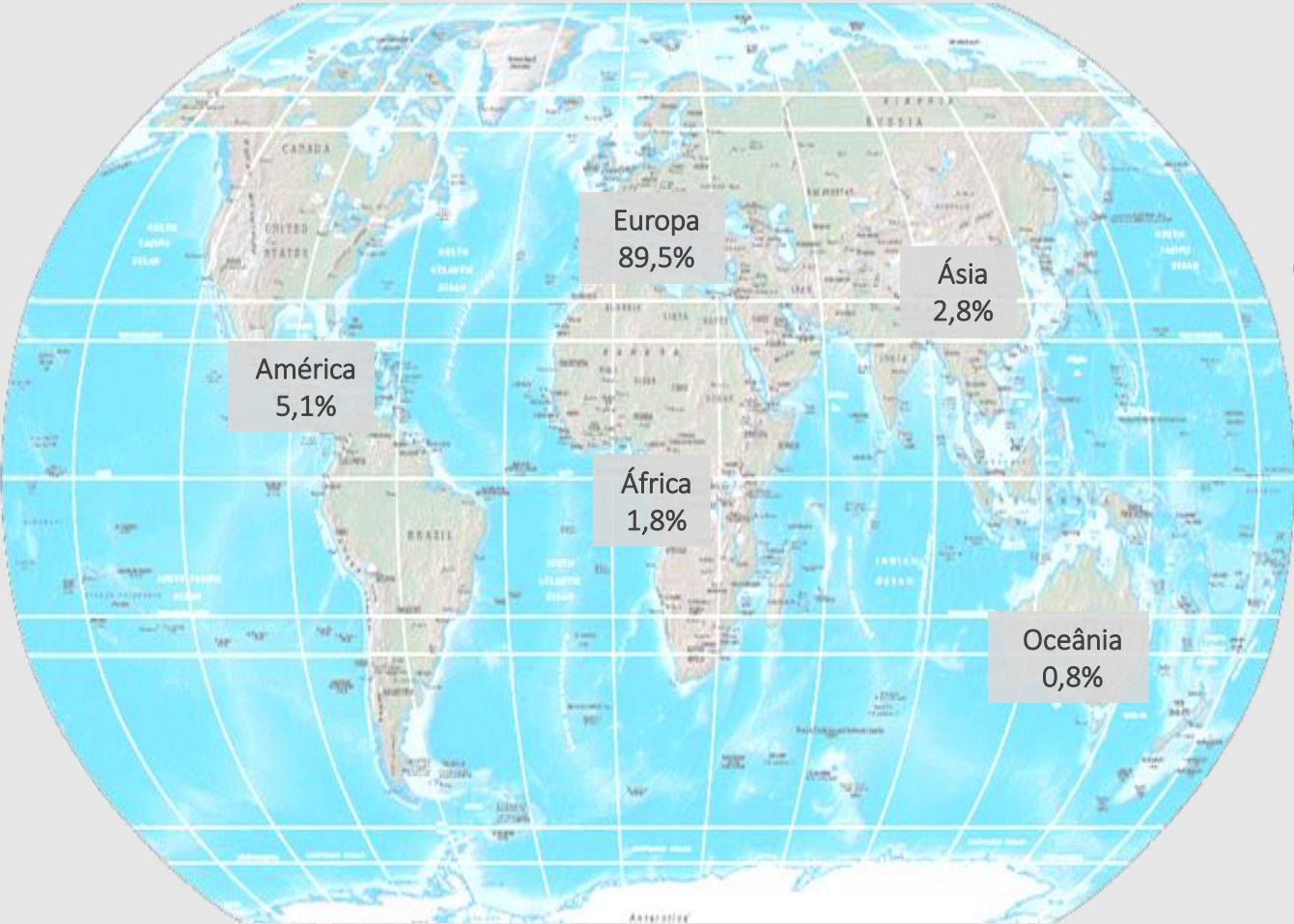
“Where do we go from here?”

Strategic Plan 2020



“These boots are made for walking”

Main markets



		Quota 2016
1	França	21,7%
2	Alemanha	17,8%
3	Holanda	14,1%
4	Espanha	9,9%
5	Reino Unido	6,9%
6	Dinamarca	4,9%
7	EUA	4,0%
8	Itália	2,8%
9	Bélgica	2,6%
10	Suécia	2,1%

Fonte: INE, APICCAPS

International Fairs

Main Events 2018

January

Pitti Uomo	Italy	Florence
White Milano	Italy	Milan
Expo Riva Schuh	Italy	Garda
Premium	Germany	Berlin
Panorama	Germany	Berlin
IF&LS	Colombia	Bogotá
WSN	France	Paris
Modfabriek	Netherlands	Amsterdam
MRket NY	USA	New York

March

Futur Moda	Spain	Alicante
Crescendo	France	Paris

April

AYMOD	Turkey	Istanbul
Fashion World	Japan	Tokyo
Leather World	UAE	Dubai

August

Pure London	UK	London
Moda Footwear	UK	Birmingham
CIFF Revolver	Denmark	Copenhagen
Chicago Collective	USA	Chicago
Gallery Shoes	Germany	Dusseldorf
Magic / Platform	USA	Las Vegas

October

Futur Moda	Spain	Alicante
Fashion World	Japan	Tokyo

November

AYSAF	Turkey	Istanbul
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February

CIFF & CIFF Kids	Denmark	Copenhagen
Gallery Shoes	Germany	Dusseldorf
Chicago Collective	USA	Chicago
Pure London	UK	London
Momad Metrópolis.	Spain	Madrid
Moda Footwear	UK	Birmingham
Le Cuir	France	Paris
Magic / Platform	USA	Las Vegas
Mipel	Italy	Milan
Micam	Italy	Milan
Lineapelle	Italy	Bolonha
SoleCommerce	USA	New York
ILM	Germany	Offenbach
Obuv' Mir Kozhi	Russia	Moscow

June

Expo Riva Schuh	Italy	Garda
Pitti Uomo	Italy	Florence
White Milano	Italy	Milan
Premium	Germany	Berlin
Panorama	Germany	Berlin
FFany	USA	New York
AYSAF	Turkey	Istanbul

July

MRket NY	USA	New York
ColombiaModa	Colombia	Medellin
Modfabriek	Netherlands	Amsterdam
IF&LS	Colombia	Bogotá

September

WSN	France	Paris
Momad Metrópolis.	Spain	Madrid
Le Cuir	France	Paris
Mosshoes	Russia	Moscow
Crescendo	France	Paris
Lineapelle	Italy	Bolonha
Mipel	Italy	Milan
Micam	Italy	Milan
ILM	Germany	Offenbach
Lineapelle	Italy	Bolonha
Obuv' Mir Kozhi	Russia	Moscow
Gallery Shoes	Germany	Dusseldorf

December

FFany	USA	New York
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“If you could make it everywhere, you can make it there: New York, New York”!

Mr. Trump, be aware! The Portuguese footwear industry is coming.

TO BE CONTINUED!

The songs and the singers

I will survive – Gloria Gaynor

You'll Never Walk Alone – Liverpool Fans and Gerry and the Pacemakers

We shall Overcome – Pete Seeger

Safety in Numbers – Debbie Harry

Where do we go from here? – Charles Bradley

These boots are made for walking – Nancy Sinatra

New York, New York – Frank Sinatra