



High-End-Shoe

WWW.HIGHENDSHOE.EU

FINAL CONFERENCE 19 SEPTEMBER 2017

**HIGH-END/ LUXURY
AND THE EUROPEAN FOOTWEAR SECTOR**



Erasmus+

European Footwear Key Facts

- ✓ A high added - value consumer product part of the Creative Industries & European Culture
- ✓ Europe represents the second world's consumer market (after China)
- ✓ Europe has the highest average export price
- ✓ 9 European countries among the 15 top exporters
- ✓ From 2009 till 2016, EU exports increased by 40% in quantity and by 90% in value

EU28 Footwear Exports outside Europe (2009-2016)

Year	N° of Pairs (Millions)	Value (Millions €)	Average price (€)	Annual Variation %		
				Quantity	Value	Price
2009	154,4	4.326,72	28,02	--	--	--
2010	169,9	4.907,56	28,88	10,0%	13,4%	3,1%
2011	194,0	5.944,43	30,64	14,2%	21,1%	6,1%
2012	206,4	6.789,51	32,90	6,4%	14,2%	7,4%
2013	222,6	7.431,67	33,39	7,9%	9,5%	1,5%
2014	225,5	7.699,63	34,14	1,3%	3,6%	2,3%
2015	215,0	7.919,51	36,83	-4,7%	2,9%	7,9%
2016	216,0	8.213,83	38,03	0,5%	3,7%	3,2%

% Var 2016 vs 2009

39,9%

89,8%

35,7%

Turnover, Employees & Enterprises in EU28

Manufacture of Footwear & Footwear Components (NACE C152)			
Years	Turnover (million Euros)	Nº of people directly employed	Number of enterprises
2011	25.306	296.200	21.192
2012	25.246	288.500	20.695
2013	26.110	288.100	20.337
2014	n/a	295.264	21.116
2015	27.000 (p)	289.366	21.096

Source: Eurostat September 2017

Employees, Turnover & Production in EU28

Source:

Eurostat
09/2017

and

World Footwear
Yearbook 2017

NACE 1520 includes Footwear and Footwear Components				
Countries	N° of people employed (2015)	Turnover (Million Euros) (2015)	Production in value (Million Euros) (2015)	Production in quantity (Million Pairs) (2016)
Italy	78.405	14.014,2	13.975,3	188
Spain	31.480	3.328,6	3.295,0	100
Portugal	47.295	2.420,5	2.367,3	82
Germany	8.925	1.996,9	1.623,8	37
Romania	49.723	962,1	915,1	54
France	no data	929,1	746,2	22
Poland	17.661	657,1	615,5	40
United Kingdom	no data	621,4	542,0	5
Slovakia	8.516	514,4	498,1	9
Austria	1.426	446,6	413,6	2
Hungary	7.199	211,4	167,8	10
Finland	1.071	180,2	165,5	2
Bulgaria	12.328	136,0	133,0	5
Greece	1.689	100,8	84,7	3

WHAT IS LUXURY?



WHAT IS LUXURY?

Sophistication

Elegance

Aesthetics

Sensuality

Exoticism

Stimulation of senses

Emotion

Behaviour

Desire

Mystery

Distinction

Prestige

Social status

Timeless

Dream

Unforgettable experience

Exceeding expectations

Craft work

Creativity

Innovation

Excellence

Exclusivity

Scarcity

Value

Extreme quality

Perfection

Detail

Customisation

Tradition

Culture

Legacy

History

A LUXURY PRODUCT

Hybrid blend of

rational : tangible
and
emotional : intangible
features

WHAT IS LUXURY?

DIVERSE GENERATIONS DIFFERENT VALUES & SOCIAL PATTERNS

GENERATION X

GENERATION Y

VS

BABY-BOOM

GENERATION Z

WHAT IS LUXURY?

GENERATION Y (MILLENNIALS, 18-34 years old)

- ✓ HIGHLY DIGITAL & OVER CONNECTED
- ✓ GLOBAL & CONSCIOUS CONSUMERS
- ✓ LOOKING FOR HIGH QUALITY
- ✓ SENSITIVE TO SUSTAINABILITY

PERSONAL LUXURY GOODS

Bain Luxury Study for Fondazione Altagama

2016 = a market of 249 billion

→ 3rd year of modest growth at constant exchange rate

Reasons: Terrorism, Brexit, US Presidential election, etc.

WHAT TO EXPECT?

- ✓ **European brands** remain **leading** the personal luxury goods segment
- ✓ **China** and other emerging countries' middle class to continue **growing** in size and **purchasing power**.
 - **Search for quality, heritage and uniqueness**
- ✓ **Online sales** for personal luxury goods to continue rapidly to increase
- ✓ Consumers **Generation Y**: More **demand** for **affordable luxury**, more focus on tangible features and quality



A NEW TOOL FOR THE EU FOOTWEAR INDUSTRY

Erasmus+ High-End Shoe Project

www.highendshoe.eu

→ An opportunity for SMEs to enhance the manufacturing of high-end and luxury footwear in Europe



Carmen Arias Castellano
General Secretary

www.cec-footwearindustry.eu



Confédération Européenne de l'Industrie de la Chaussure
European Confederation of the Footwear Industry