

The European Confederation of
the Footwear Industry (CEC)
&
The Footwear Industry in Europe

December 2018



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

CEC Presentation

- ✓ **THE VOICE** of the European Footwear Industry in Brussels
- ✓ Members represent **88% of EU footwear production**
- ✓ **CEC Members (12)**: Czech Republic, France, Finland, Greece, Hungary, Italy, Poland, Portugal, Romania, Sweden, Spain, United Kingdom
- ✓ **CEC Observers (3)**: Tunisia, Turkey, Ukraine



CEC Objective and Activities

- ✓ Objective: To boost the **competitiveness** and **sustainable growth** of European footwear companies
- ✓ Activities:
 - **Promotes interests of EU footwear** among EU institutions and international organisations (regarding policies & legislation)
 - Supports **research and innovation** (EU funded projects)
 - Fosters **employment and skills development** & helps **attract new generations** to the sector (EU funded projects & initiatives)
 - Serves as **platform for footwear stakeholders** (World Footwear Congress & International Footwear Forum)



Policies and Regulations

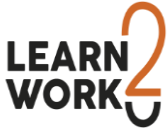
- ✓ Access to non-EU markets, tariff & non tariff barriers
- ✓ Internationalisation of SMEs and access to finance
- ✓ Internal market and product safety
- ✓ IPR & fight against counterfeited goods
- ✓ Sustainability, circular economy, chemicals and environmental legislation
- ✓ Corporate Social Responsibility
- ✓ Standardisation
- ✓ Employment and education



Erasmus+ projects:



High-End Shoes – A new profile and Innovative Training Programme for Luxury Footwear Manufacturing (ended)



Learn2Work – Production Schools Model to Attract Young Learners into Footwear Careers -learning by doing (ended)



Shoes Made in EU – The European Shoemaker: a new curriculum for shoe makers updated with the latest materials, engineering and manufacturing processes and techniques (ended)



Knowledge4Foot – Knowledge Platform for Transferring Research and Innovation in Footwear Manufacturing (ended)



Fit to Comfort (Fit2Com) – Skills Alliance for comfort & healthy footwear manufacturing – a new qualification programme & innovative training to manufacture fashionable comfort Shoes



Digital TCLF 2025 - EU Textile, Clothing, Leather and Footwear (TCLF) Skills Council: Analysis & identification of Emerging Occupations in a Digital Environment

Erasmus+ Project:



Blueprint Skills4Smart TCLF 2030 – Skills4Smart Textile, Clothing, Leather, and Footwear (TCLF)

Grant: Max €3.980.790 **Duration:** Jan. 2018 – Dec. 2021

Objective: to attract, train, and qualify people to work in the TCLF sectors through a sustainable network of public/ private actors committed to supporting skills anticipation and development while creating employment opportunities

Outcomes:

- A **Skills Strategy** to anticipate skills needs & deliver innovative education in Europe
- A strong **community of TCLF public/ private stakeholders** working to ensure continuous skills development & new jobs.
- **Enhance attractiveness** of the TCLF sectors to potential workers.
- **8 new transnational VET profiles and respective curricula and training programmes** focused on digitalisation, sustainability and KETs to address companies' changing needs
- A **Virtual Fashion Campus** with project's outcomes and as a stakeholders platform to enhance TCLF skills excellence for industrial modernization in EU.

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



✓ Social Dialogue at EU level (2 Projects)

Attracting New Skilled Workforce for Quality Jobs in the European Footwear Sector (ended)

Duration: February 2017 – July 2018

Objective: to address the recruitment of young workers and define mid-term strategies for attracting, training and hiring them, providing them with the necessary opportunities to obtain quality jobs within the footwear industry.

Activities: New sectoral identity; Targeted communication campaign; Best practices on recruitment and retention; EU design contest for students; Young Workers' Day in IT, PL, PT and SP. <http://inmyshoesproject.eu/>

Developing Social Dialogue in the EU Footwear Sector (ended)

Duration: 2014 - 2015

Objective: To study the footwear sector and national Social Dialogue systems /practices to develop the best conditions for the renewal and adaptation of footwear sectoral social dialogue at EU level to changes in employment and work.

Activities: Assessment of priorities of action in the EU footwear sector; Networking with all SD actors in the main European footwear country producers; Study report on existing structures and legal framework of SD in IT, FR, PT, SP and RO.



#INMYSHOES
THE FOOTWEAR SECTOR IS YOUNG



✓ **Environmental topics (3 projects)**



CO2Shoe – The Footwear Sector Carbon Footwear (LIFE +) (ended)

Duration: October 2013 – March 2017

Objective: to develop and facilitate the use of a carbon footprint tool specific to footwear to calculate the greenhouse gas emissions produced in the manufacturing of each pair of shoes.

Step2Sustainability (ended)

Duration: January 2014 – July 2016

Objective: to create a new profile and respective training Programme and content on sustainable manufacturing (**LdV**)

LIFE GreenShoes4All - Footwear environmental footprint category rules implementation and innovative green shoes eco-design and recycling- Oct. 18- Sept. 21

Objective: to implement, demonstrate and disseminate (1) **the footwear Product Environmental Footprint (PEF) methodology** and (2) the added value resource of efficient **eco-design, recycling and manufacturing solutions** to obtain performing shoes with lower PEF while reducing costs for companies.





LIFE GreenShoes4All - Footwear environmental footprint category rules implementation and innovative green shoes eco-design and recycling

- ✓ Promotes a **Single Market for Green Products**
- ✓ It will test and demonstrate new recycling routes & business models towards a **Circular Economy**
 - => by reducing the discarded waste of shoe raw materials
 - => with new green jobs, services & products due to waste management
- ✓ Promotes **innovative eco-design concepts & eco-processes** to achieve
 - => a decrease CO₂ and GHG emissions
 - => a higher efficient use of Natural Resources
 - => a reduction of Product Environment Footprint
 - => new recycled materials
- ✓ It will lead to **greater competitiveness** of footwear companies



CEC organises:

✓ **World Footwear Congress**

- **Platform** for discussing changes and challenges that the footwear industry faces due to globalisation
- **5 editions:** April 2003 & April 2005 in Brussels, Belgium; April 2007 in La Rioja, Spain; Nov. 2011 in Rio de Janeiro, Brazil; Nov. 2014 in León, México
- **Next:** Naples in April 2019, **Sustainability & Digitalisation**

✓ **International Footwear Forum**

- **Platform** to strengthen collaboration among leading footwear national associations and confederations in the world
- **3 editions:** Sept. 2015 in Milan; June 2016 in New York; May 2018 in Porto



- **Next:** Naples in April 2019

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**, Italy in 3rd position
- ✓ From 2009 to 2017, EU exports **increased by 48% in quantity and by 113% in value**



EU28 Footwear Exports outside Europe (2009-2017)

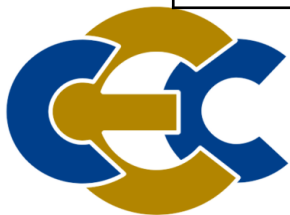
Year	N° of Pairs (Millions)	Value (Millions €)	Average price (€)	Annual Variation %		
				Quantity	Value	Price
2009	154,4	4.326,72	28,02	--	--	--
2010	169,9	4.907,56	28,88	10,0%	13,4%	3,1%
2011	194,0	5.944,43	30,64	14,2%	21,1%	6,1%
2012	206,4	6.789,51	32,90	6,4%	14,2%	7,4%
2013	222,6	7.431,67	33,39	7,9%	9,5%	1,5%
2014	225,5	7.699,63	34,14	1,3%	3,6%	2,3%
2015	214,9	7.920,31	36,86	-4,7%	2,9%	7,9%
2016	216,0	8.213,83	38,03	0,5%	3,7%	3,2%
2017	228,9	9.221,00	40,28	6,0%	12,3%	5,9%



% Var 2017 vs 2009	48%	113%	44%
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Turnover, Employees & Enterprises in EU28

Manufacture of Footwear & Footwear Components (NACE C152)			
Years	Turnover (million Euros)	Nº of people directly employed	Number of enterprises
2012	25.246	288.500	20.695
2013	26.110	288.100	20.337
2014	27.000 (e)	293.583	21.000
2015	27.077 (p)	287.371	20.600 (e)
2016	27.142 (p)	286.651 (p)	20.300 (ep)



Source: Eurostat October 2018

Employees, Turnover & Production in EU28

Sources:

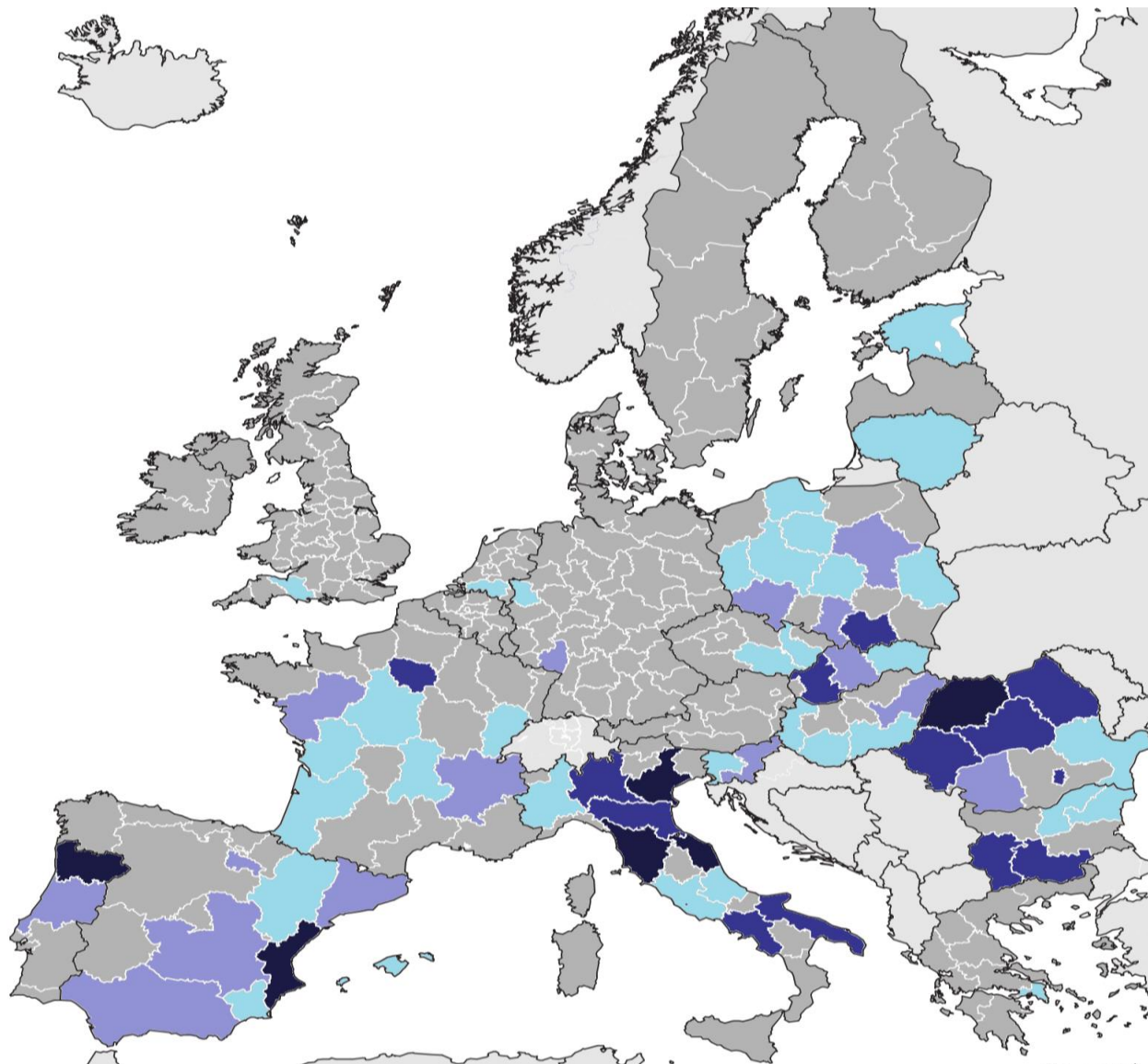
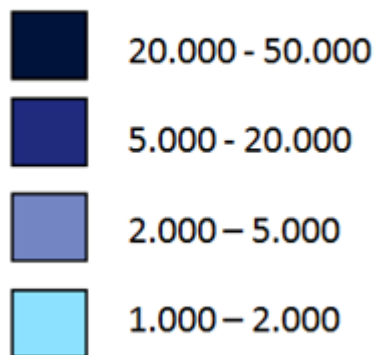
*Eurostat 11/2018
and
World Footwear
Yearbook 2018*

NACE 152 includes Footwear and Footwear Components (2017)				
Countries	N° of people employed	Turnover (Million Euros)	Production in value (Million Euros)	Production in quantity in (Million Pairs)
Italy	78.544 (in 2016)	13.831,0 (in 2016)	14.023,9(in 2016)	191
Spain	29.098	3.604,3	3.485,0	102
Portugal	47.672	2.502,2	2.425,3	83
Germany	8.233	1.937,9	1.729,1	40
Romania	43.861	1.020,4	932,2	43
France	5.124 (2016)	698,6	570,6	22
Poland	19.078	478,9	708,0	42
United Kingdom	5.060 (in 2014)	631,2 (in 2016)	508,3 (in 2016)	6
Slovakia	9.026	593,6	553,8	9
Austria	1.405	463,8	456,7	2
Hungary	6.641	227,1	175,7	10
Finland	929	205,6	207,0	2
Bulgaria	10.629	123,8	121,4	3
Slovenia	1.162	116,6	96,7	2
Greece	1.697 (in 2016)	102,3 (in 2016)	87,6 (in 2016)	3
Czech Republic	2.087	69,0	66,3	4
Sweden	196 (in 2016)	30,6 (in 2016)	30,3 (in 2016)	1
Belgium	191	25,7	30,3	1
Estonia	619	24,0	25,2	1
Lithuania	356	9,7	9,4	1
Denmark	84	17,3	16,6	6
Latvia	203	3,3	3,2	0
Cyprus	37	1,8	1,2	0
Netherlands	763:	:	:	1
Croatia	6.314	115,2	109,2	5



NACE C15 – Manufacturing in Leather and Related Products (Nº of people employed per NUTS 2 region)

Nº of people employed



Manufacturing of Leather, Footwear & Leather Products

Distribution of employment per regions in Europe in 2014

- ✓ 384,366 direct employees
- ✓ High geographic concentration
- ✓ 9 regions with the highest employment represent 58%:
 - Italy: Toscana, Veneto, Marche, Lombardia, Campania
 - Portugal: Norte
 - Romania: Nord-Vest, Centru
 - Spain: Comunidad Valenciana
- ✓ 9 regions with highest employment vs. active population :
 - Italy: Marche, Toscana, Veneto
 - Portugal: Norte
 - Romania: Nord-Vest, Centru, Vest
 - Spain: Comunidad Valenciana, La Rioja



NACE C15 – Manufacturing in Leather and Related Products

NUTS 2 Region- Nomenclature of territorial units for statistics, subdividing the EU territory into regions at 3 levels	N° of people employed (2014)
Norte (Portugal)	45.840
Toscana (Italy)	41.776
Veneto (Italy)	27.016
Marche (Italy)	26.578
Comunidad Valenciana (Spain)	20.973
Nord-Vest (Romania)	20.155
Lombardia (Italy)	13.712
Centru (Romania)	13.703
Campania (Italy)	12.725
Vest (Romania)	10.776
Île de France (France)	9.550
Emilia-Romagna (Italy)	7.195
Západné Slovensko (Slovakia)	6.864
Yugozapaden (Bulgaria)	6.529
Nord-Est (Romania)	6.069
Yuzhen tsentralen (Bulgaria)	6.062
Bucuresti - Ilfov (Romania)	5.542
Malopolskie (Poland)	5.382
Puglia (Italy)	5.340
Észak-Alföld (Hungary)	4.874
Slaskie (Poland)	4.173
Centro (Portugal)	3.508
La Rioja (Spain)	3.447
Castilla-la Mancha (Spain)	3.195
Mazowieckie (Poland)	2.950
Dolnoslaskie (Poland)	2.921
Cataluña (Spain)	2.830
Rhône-Alpes (France)	2.693
Andalucía (Spain)	2.571
Stredné Slovensko (Slovakia)	2.418
Vzhodna Slovenija (Slovenia)	2.335
Pays de la Loire (France)	2.311
Sud-Vest Oltenia (Romania)	2.199
Rheinessen-Pfalz (Germany)	2.129



Thank you for your attention

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