



Unified Knowledge Services Pvt. Ltd.

***SPORTS*TEXTILES**



GLOBAL SPORTS FOOTWEAR MARKET REPORT MAY 2018



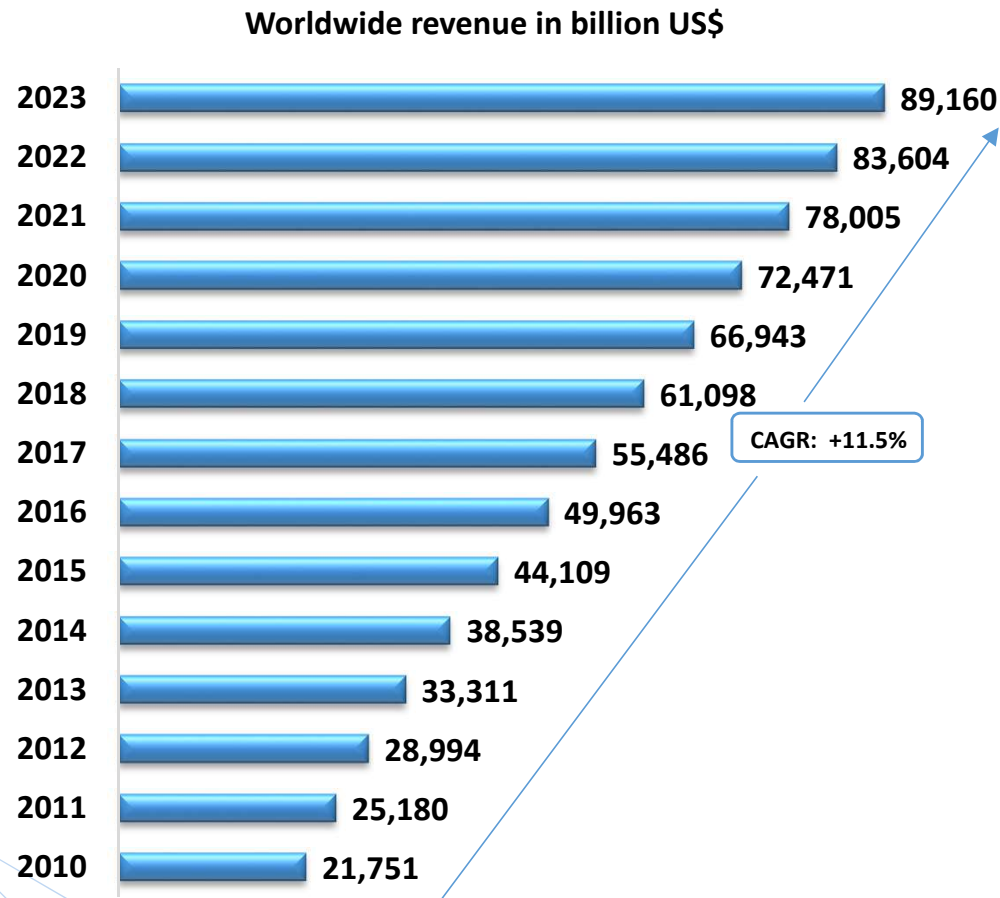


- ✓ Footwear is the second most important fashion segment within the retail business just behind apparel. Just like the market for apparel, the Footwear market is currently shaped by a tremendous change in customers' purchasing habits. The rise of eCommerce and new store concepts created by major sportswear manufacturers exert substantial pressure on stationary retail stores.
- ✓ The segment Athletic Footwear accounted for 15% of the Footwear revenue in 2018. The worldwide revenue of US\$61 billion in 2018 is expected to increase to US\$89 billion by 2023. The Athletic Footwear segment has seen an upsurge during the past years and has gained importance in comparison to classic town footwear. The most important brands in this segment are Nike, Adidas and Puma. This report from the series of segment reports gives an overview of the Athletic Footwear market from an international perspective. The Athletic Footwear segment includes shoes specifically designed for sports purposes (e.g. soccer, tennis, basketball etc.). The definition is based on the Harmonized System of international trade (specifically the HS codes 640219 and 640319) which include only functional sports shoes. Most so-called "athleisure" footwear or sneakers, i.e. everyday footwear with an athletic appearance, are excluded from this definition since fashion aspects outweigh functional ones.
- ✓ The segment Textile & other Footwear accounted for 46% of the Footwear revenue in 2018. The worldwide revenue of US\$193 billion in 2018 is expected to increase to US\$246 billion by 2023. The market for Textile & other Footwear comprises models that are either not made of leather and/or can not be assigned to athletic footwear. Town footwear with textile, rubber or plastic uppers as well as rubber boots, flip flops and wooden clogs fall into this category.



In 2018, worldwide Athletic Footwear sales amounted to US\$61 billion

Athletic Footwear: overview and sales figures



*1: CAGR: Compound Annual Growth Rate / average growth rate per year

Segment overview

- The segment Athletic Footwear accounted for 15% of the Footwear revenue and 9% of volume sales in 2018.
- In 2018, Athletic Footwear sales increased by 10.1% in comparison to 2017 and reached US\$61 billion and 1.14 billion pairs.
- In the Athletic Footwear segment, Luxembourg (US\$53) and Austria (US\$48) had the highest annual revenue per capita in 2018

Athletic Footwear sales worldwide

Revenues



US\$61 bn
in 2018

+13.8%
CAGR¹ 2010-2018

Volume sales

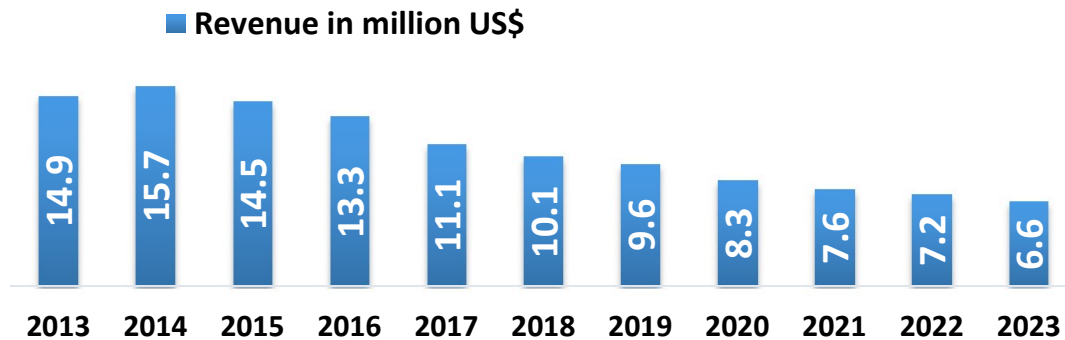


1.14bn pairs
in 2018

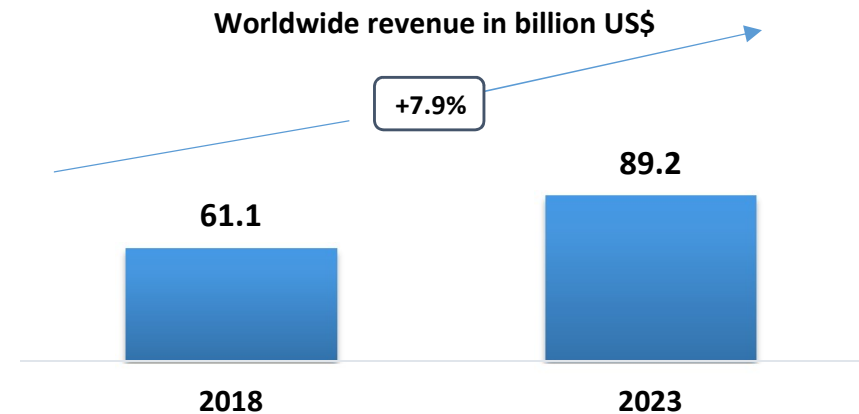
+8.1% CAGR¹
2010-2018



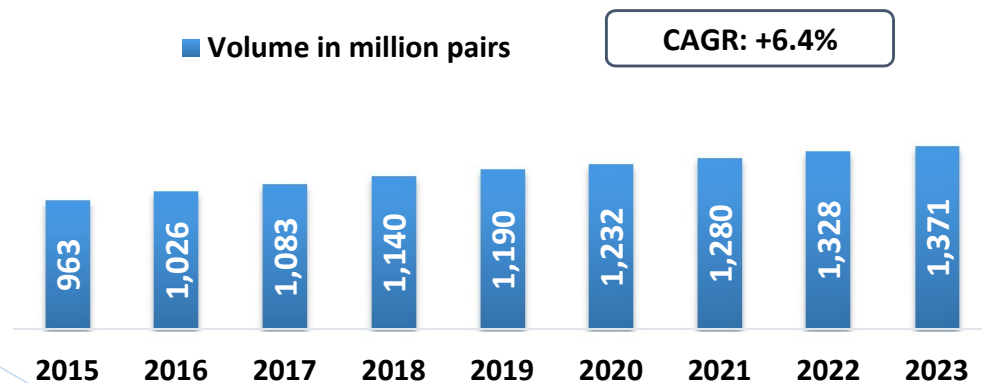
Athletic Footwear revenue growth between 2018 and 2023



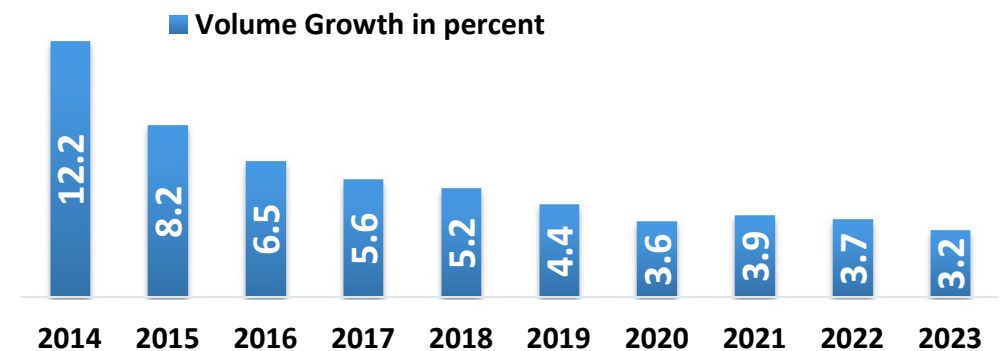
Athletic Footwear sales worldwide between 2018 and 2023



Athletic Footwear average volume between 2013 and 2023



Athletic Footwear average volume between 2014 and 2023



Athletic Footwear sales in Europe will increase by 9.4% between 2010 and 2023

Market KPI comparison

Europe

Athletic Footwear revenues in billion US\$

	unit	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	CAGR
Footwear total	BnUS \$	91.3	94.6	98.2	101.6	105.0	107.6	111.8	116.3	119.8	123.5	127.0	130.4	133.8	136.8	3.2%
Athletic Footwear	BnUS \$	6.5	6.8	7.4	8.4	9.8	11.6	13.5	15.3	16.8	18.0	8.9	19.7	20.5	21.0	9.4%
Share of total market (in %)		7.2	7.2	7.5	8.2	9.4	10.7	12.0	13.1	14.0	14.6	14.9	15.1	15.3	15.4	6.1%

United States

Athletic Footwear revenues in billion US\$

	unit	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	CAGR
Footwear total	BnUS \$	65.0	69.5	73.8	77.1	80.0	82.7	86.1	87.0	89.1	91.2	93.3	95.5	97.7	99.9	3.4%
Athletic Footwear	BnUS \$	4.3	5.2	6.3	7.5	8.8	10.6	12.5	13.9	15.2	16.7	18.2	19.7	21.3	23.0	13.8%
Share of total market (in %)		6.6	7.5	8.5	9.7	11.0	12.8	14.6	16.0	17.1	18.3	19.4	20.6	21.8	23.0	10.1%

*CAGR: Compound Annual Growth Rate / average growth rate per year



Athletic Footwear sales in China will increase by 14.3% between 2010 and 2023

Market KPI comparison

China

Athletic Footwear revenues in billion US\$

	unit	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	CAGR
Footwear total	BnUS \$	35.9	41.7	45.4	48.6	51.8	53.5	54.7	57.6	60.6	63.5	66.3	69.2	72.0	74.9	5.85%
Athletic Footwear	BnUS \$	2.5	3.0	3.6	4.3	5.0	5.8	6.5	7.4	8.5	9.5	10.6	11.7	12.9	14.1	14.3%
Share of total market (in %)		6.9	7.3	8.0	8.8	9.7	10.7	11.8	12.9	14.0	15.0	16.0	17.0	17.9	18.8	8.0%

South America

Athletic Footwear revenues in billion US\$

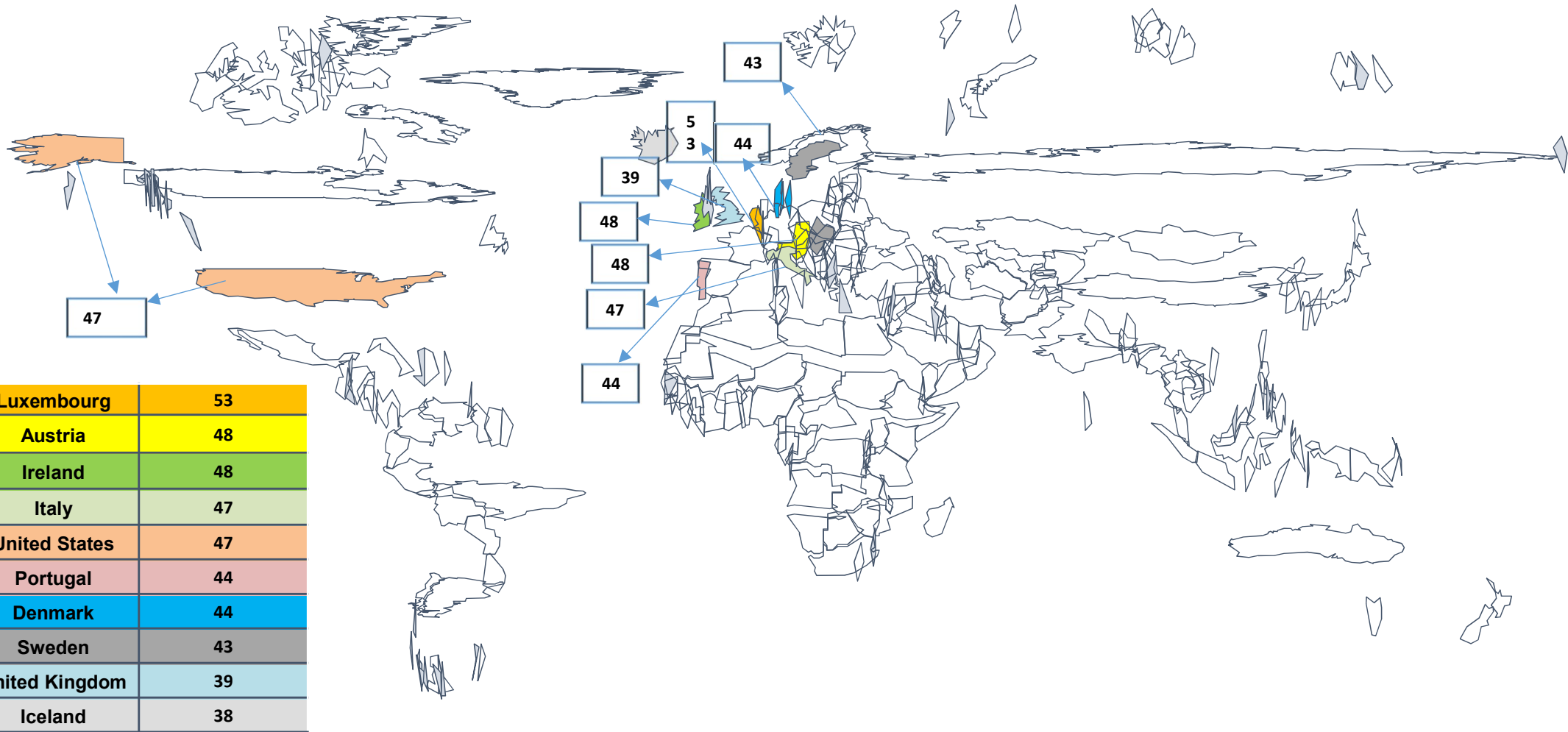
	unit	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	CAGR
Footwear total	BnUS \$	25.8	30.2	34.1	37.2	40.9	43.7	46.6	51.1	55.6	61.2	67.2	73.1	78.9	84.9	9.6%
Athletic Footwear	BnUS \$	2.8	3.7	4.7	5.6	6.2	6.3	6.4	6.9	7.8	9.4	10.9	12.0	13.0	14.2	13.4%
Share of total market (in %)		10.8	12.2	13.8	15.0	15.2	14.4	13.6	13.4	13.9	15.4	16.3	16.5	16.4	16.7	3.4%

*CAGR: Compound Annual Growth Rate / average growth rate per year

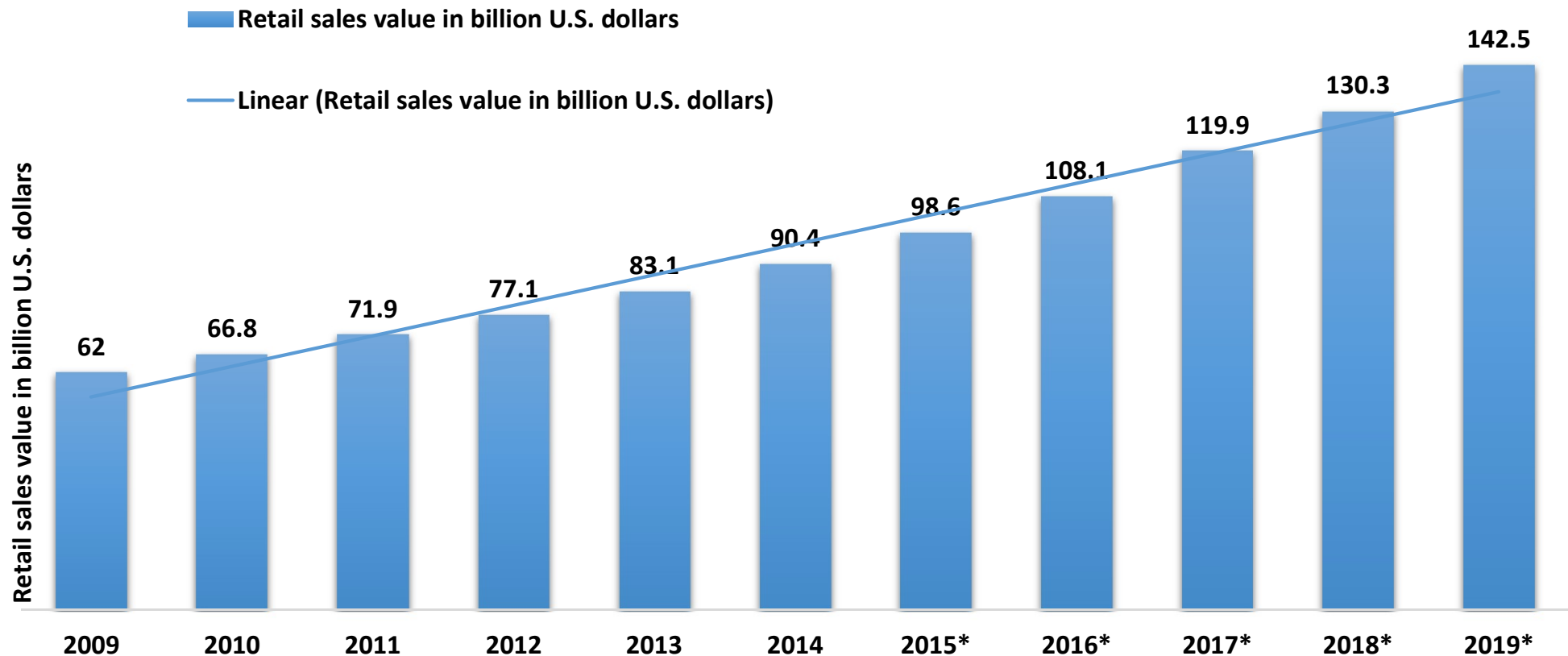


Regional Comparison of Athletic Footwear - Top-10 per-capita revenue in US\$ in 2018

In 2018, Luxembourg and Austria spent the most on Athletic Footwear



Retail sales value of the sports footwear market worldwide from 2009 to 2019 (in billion U.S. dollars)

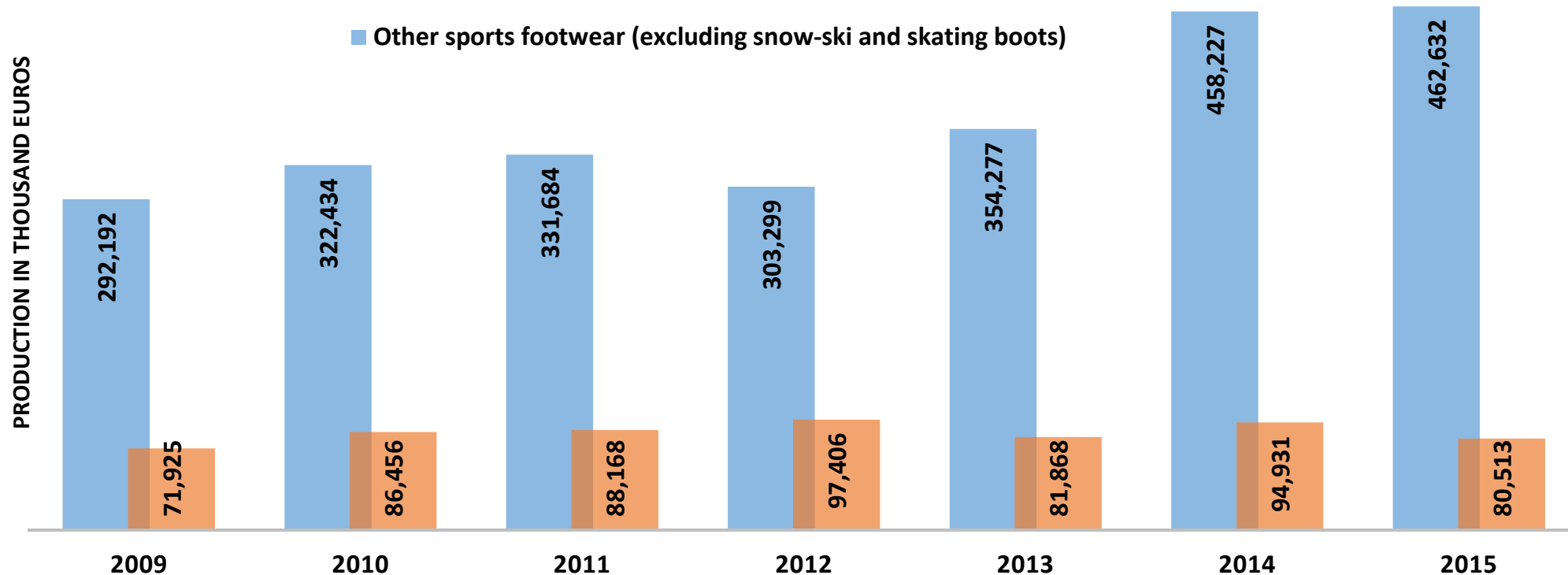


This statistic shows the retail sales value of sports footwear worldwide from 2009 to 2019. In 2015, the global sports footwear market generated about 99 billion U.S. dollars in retail sales.



Sold production value of sports footwear in the European Union (28 countries) from 2009 to 2015 (in 1,000 euros)

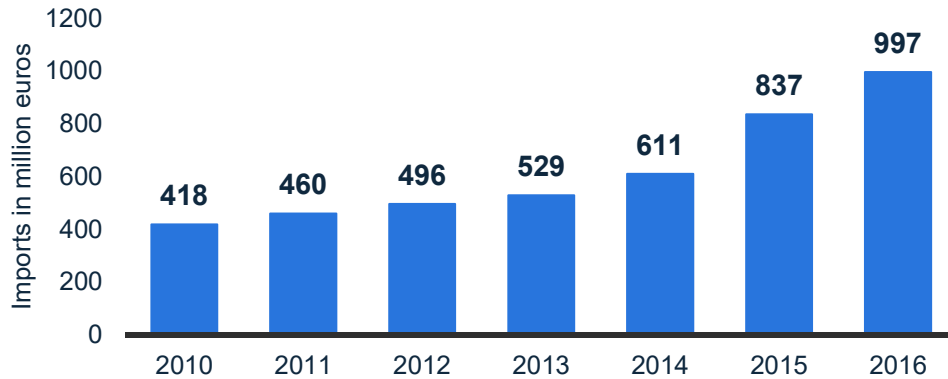
Sports footwear production value in the EU-28 2009-2015



This statistic depicts the annual sold production value of sports footwear in the European Union (28 countries) from 2009 to 2015. In 2015 the value of sports footwear produced and sold by manufacturers in the European Union reached almost 463 million euros.

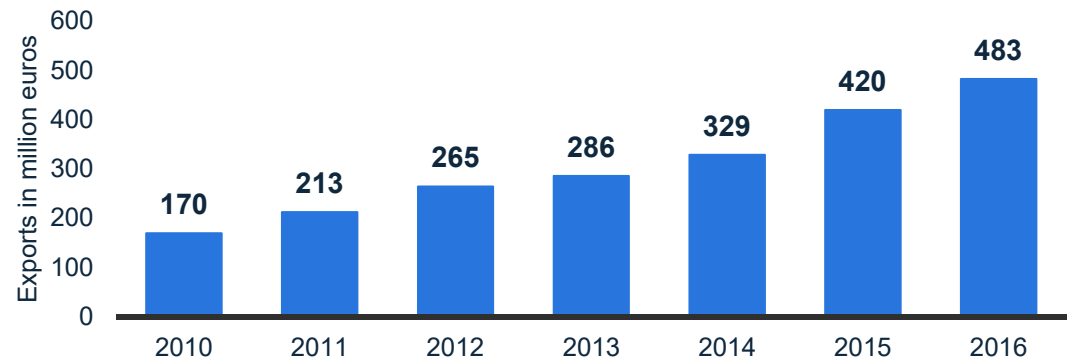


Sales value for imports of sports footwear in France from 2010 to 2016 (in million euros)

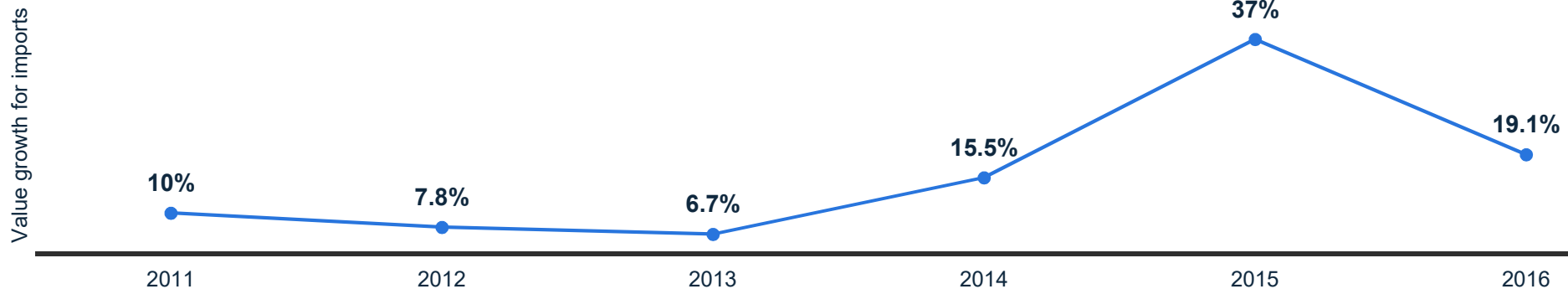


This statistic shows the sales value for imports of sports footwear in France from 2010 to 2016. In 2016, France imported sports shoes with a total value of almost one billion euros.

Sales value for exports of sports footwear in France from 2010 to 2016 (in million euros)



This statistic shows the sales value for exports of sports footwear in France from 2010 to 2016. In 2016, the export value of sports shoes in France amounted to almost 500 million euros.

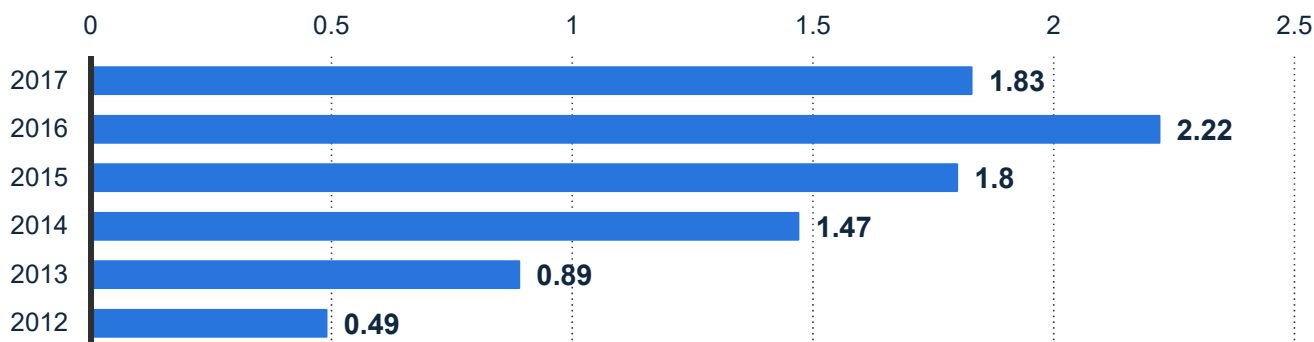


This statistic shows the value growth for imports of sports footwear in France from 2011 to 2016. The biggest increase took place in 2015. That year, the imports of sports footwear increased by almost 40 percent compared to the previous year.



Trade value of sports footwear exported from Canada from 2012 to 2017 (in million U.S. dollars)

Trade value in million U.S. dollars

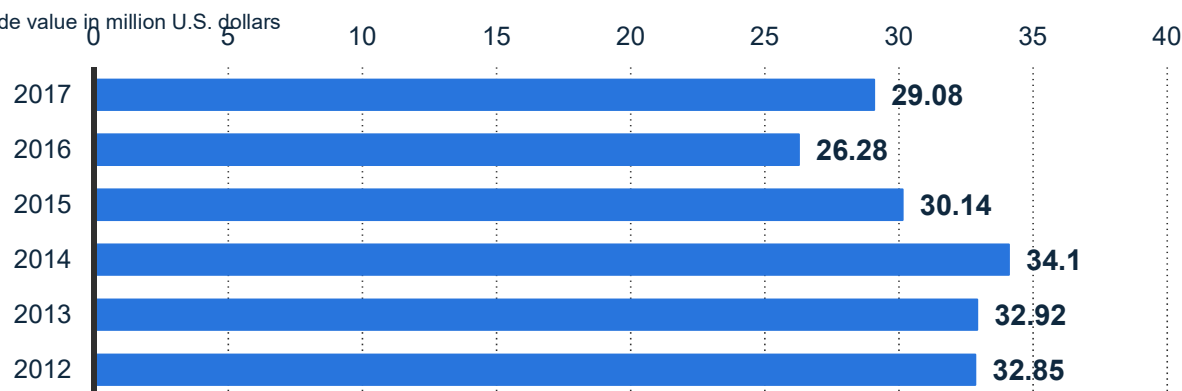


Your Headline

Your Notes: This statistic shows the trade value of sports footwear exported from Canada from 2012 to 2017. The trade value of sports shoes exported from Canada amounted to approximately 2.22 million U.S. dollars in 2016, decreasing to approximately 1.83 million U.S. dollars in 2017.

Trade value of sports footwear imported to Canada from 2012 to 2017 (in million U.S. dollars)

Trade value in million U.S. dollars

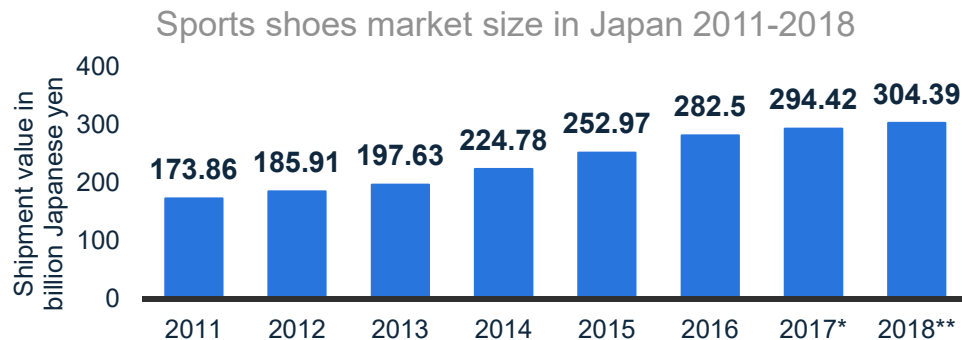


Your Headline

Your Notes: This statistic shows the trade value of sports footwear imported to Canada from 2012 to 2017. The trade value of sports footwear imported to Canada amounted to approximately 26.28 million U.S. dollars in 2016, increasing to approximately 29.08 million U.S. dollars in 2017.

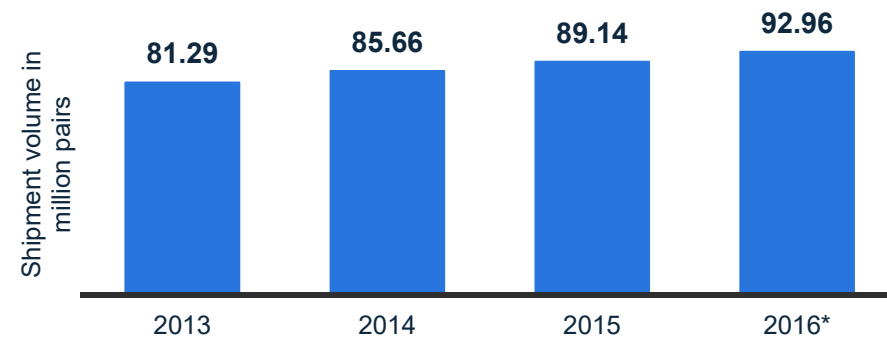


Domestic shipment value of the sports shoes market in Japan from 2011 to 2018 (in billion Japanese yen)



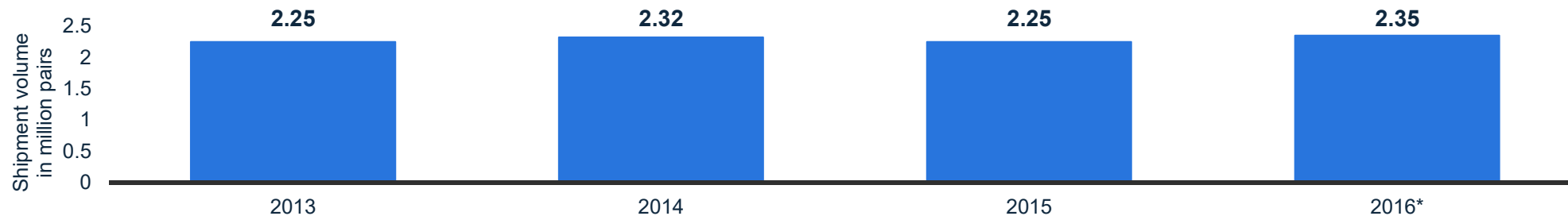
Your Notes: The statistic depicts the domestic shipment value of the sports shoes market in Japan from 2011 to 2018. In 2018, the sports shoes market size was forecasted to reach approximately 304 billion Japanese yen, up from about 174 billion yen in 2011.

Total domestic shipment volume of sports shoes in Japan from 2013 to 2016 (in million pairs)



The statistic depicts the total domestic shipment volume of sports shoes in Japan from 2013 to 2016. In 2016, the sports shoes shipments volume amounted to nearly 93 million pairs, up from 81.29 million pairs shipped in 2013.

Domestic shipment volume of sports sandals in Japan from 2013 to 2016 (in million pairs)



The statistic depicts the domestic shipment volume of sports sandals in Japan from 2013 to 2016. In 2016, the sports sandals shipments volume amounted to approximately 2.35 million pairs, up from 2.25 million pairs shipped in 2013

Note: Japan; 2011 to 2016; market sizes is based on the shipment value (domestic shipment) of manufacturers
Source(s): Yano Research; [ID 693125](#)



