

Spain's shoe manufacturers sold a record number of pairs in 2014, partly due to a new focus on export markets.

A safe bet for Spanish shoemakers?

To celebrate its 100th anniversary, this Valentine's Day La Rioja-based shoe brand Victoria hired the back rows of cinemas in its home town and encouraged customers to reminisce about their first love. The marketing campaign, which also included parties and a limited-edition shoe design, was based around the first shoe produced by the brand in 1915, which founder Gregorio named after his first love, his wife, Victoria. "We created a campaign based around love, which included producing a video, and customers signed up to get free cinema tickets on Facebook," explained Juan Sevilla, its export manager.

Victoria grew rapidly in the 1970s and 1980s due to the popularity of its canvas plimsolls, which are still made in the Calahorra-based factory. But it is the export strategy embarked on in 2006 and accelerated in the past few years that has borne fruit: sales have increased fivefold in that time and now more than 80% of production is exported.

The ongoing struggles in the domestic market, which has

seen the economy nosedive since 2008, have led many companies to refocus. Rather than targeting local markets, they have cast their net wider, to great success: 2014 was a record year for the country's footwear sales. Data from FICE, the Spanish Footwear Industry Federation, suggests companies sold €2.6 billion worth, or 154 million pairs, in 2014. These figures represent an increase of 17% in both revenue and volume over 2013. Exports to the EU (80% of the total) grew 20%, with leather shoes making up two-thirds and most heading to neighbouring France, but also to Italy, Germany, Portugal and the UK. Non-EU exports increased 8% in value, with the US and Japan the top destinations.

"Since the crisis began, companies are making a special effort to diversify markets and devote themselves to exports," Patricia Piñeiro Orellano, FICE's director of the internal market and European affairs, tells *World Footwear*. "In addition, they had to follow a policy of containment of prices and shrinking of margins."



Spanish footwear firm Victoria celebrates its centenary in 2015.

CREDIT: VICTORIA

New strategy

Vitti Love, a leather specialist based in Elche, has been making shoes and boots in Italian leather for more than 50 years, but only started exporting seriously a couple of years ago. "We are learning how to export and are changing our designs to meet the different requirements of these markets," explains the company's CEO, Francisco Varo. "In the past we made classic designs, but we have adapted our styles to include high wedges and bags, and extended our agents network all over Europe." Some of the workers have been with the family-owned company more or less since its inception, and its own in-house design and production means it can stay flexible and adapt to changing demands. "Last season we exported 60% to 65% but this season it's going to be 80% or more," she added.

Similarly, Luis Gonzalo, a high-end, family-owned brand based in the eastern town of Almansa, started to export two years ago. Its shoes are made mainly from Italian leather, by 50 skilled workers in the factory it has occupied since 1966. Export manager Justi Fernandez explained that shoes made in Spain are growing in popularity. "Buyers like it if the brand has their own factory, customers value that," he says. "With the situation in Spain we realised we should look to export markets so we started to go fairs, such as Micam."

Change at Momad

One telling fact about the state of the domestic market is that more Spanish companies exhibited at Milan-based shoe fair Micam this year than they did at Madrid's Momad Metropolis. The once-popular Spanish fair has suffered over the past few years, in part because of the economic decline, but also due to various organisational issues.

Elche-based leather bootmaker Panama Jacks exhibited at Moda 10 years ago but now opts for Micam, Germany's GDS, Pure in the UK and Micam Shanghai. Similarly, Vitti pulled out a few years ago. "We already have a lot of agents in Spain," explained a Vitti Love spokesperson on their choice of show, adding that they had increased orders at Micam in February by 25% compared with the September edition. "If the organisers did a show in Elche, that might be more interesting for us, because buyers could visit our factory and see how we do things."

Momad's February edition registered 21,829 visitors, 4% more than in February 2014. There was a record number of exhibitors, 1,200, but a mere 130 of these were footwear companies, and only 80 from Spain. A lack of international visitors was also noted.

Under its previous guise as Modacalzado, the show formerly co-located with leathergoods event Iberpiel Marroquinería to make up Sipel, which attracted around 20,000 visitors in the mid-2000s. However, as the recession took hold, exhibitors pulled away, and visitor numbers had fallen to less than half that number by 2008. Organisers relaunched as Momad in 2013, adding accessories and apparel firms.

FICE had previously criticised the new set-up, suggesting it did footwear firms no favours because featuring apparel and accessories in the same halls meant there was less emphasis on shoes. Following consultation, show organiser Ifema announced in March that footwear will exclusively occupy hall four for the September 2015 event "in response to the sector's wish to stand apart with an identity of its own".

Conversely, while many of the brands at Micam preferred the



High-end Luis Gonzalo uses Spanish and Italian leathers.

CREDIT: LUIS GONZALO



Vitti Love has extended its range to include booties, brogues and bags. CREDIT: VITTI LOVE



Neosens uses embossed soles made in a group-owned factory.

CREDIT: NEOSENS



Buyers at Momad.

CREDIT: MOMAD

international outlook of the Italian show, some of the smaller outfits liked Momad's informal feel. "Momad is very easy, people just come to your stand and buy," said Lirette Gerlach, founder of Netherlands-based Chic by Lirette. "The Spanish brands I share a manufacturer with can sign up 30 to 40 new customers at Momad, but depending on where your stand is, Micam can be quite quiet. It's a big difference."

Despite this, Micam confirmed its reputation as one of the

most important international fairs for footwear brands. February's show attracted 32,100 visitors, 15,700 of whom came from outside Italy, the first time Italian buyers exceeded non-Italian ones since September 2011.

Italian footwear production fell below the threshold of 200 million pairs in 2014 for the first time since 2008, but

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manufacturers association Assocal said data was pointing to a recovery in Italy, and across much of Europe. "This is the beginning of an upturn," suggested Tommaso Cancellara, an Assocal director.

International vibe

La Rioja-based Neosens, part of the Art Footwear group, hoped to capitalise on Micam's international outlook, even though this year it clashed with Moda in Birmingham and Magic in Las Vegas. Neosens has attended Micam since its launch eight years ago, in which time it has grown exports to between 80% and 90%, not only to Europe but also to the US, Canada, Japan and Russia. The shoes are made from leather and hand brushed with a special cream to create an aged appearance.

Just over 210 Spanish companies exhibited at Micam, 145 of them under the guidance of FICE. "Micam is one of the leading shoe events worldwide, therefore it is an important meeting point for the Spanish brands in their promotional activities," explains Ms Piñeiro Orellano.

The footwear producing hub of Valencia, the region where half of Spain's shoes are made, reported 27% growth in exports last year. Neighbouring region Murcia increased its exports by 12.3%, with one of its largest players, New Rock, selling in 86 countries. The company treats, laser cuts and embosses the leathers for its wide-range of styles of biker boot and casual leather shoes, and has been exhibiting at Micam for many years: "We don't have to exhibit at Momad as we invite all our customers to our factory," explains New Rock's sales manager, which includes a trip to a mini bullfighting ring on-site.

Co_shoes fills a void

This important region now has a new show, Co_Shoes, the second of which took place in late April. Rather than showcasing finished products, it is an opportunity for brands to meet outsource partners, and attracted 50 exhibitors to the inaugural event last October.

"Co_Shoes is an initiative that emerged as a response to a process of relocation of production and the demands to manufacture in Spain coming from national and international brands and retailers," explains FICE. "This allowed us to take action to support companies engaged in manufacture and build a path for strengthening the industrial fabric." The second edition took place in a larger hall at the Alicante Exhibition Centre in Elche.

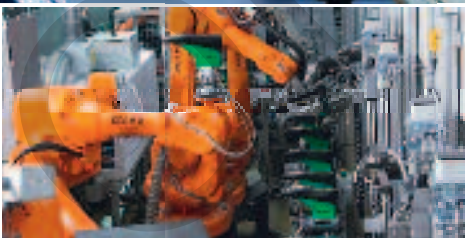
The next step is diversification. FICE wants companies to focus on Asia, where only 7% of exports head. "This does not correspond to the size and level of growth in these markets," says Ms Piñeiro Orellano. "The US is also a priority market, it is experiencing a positive development and we must continue to build on the favourable euro/dollar exchange rate."

The exchange rate – which saw the dollar hit a 12-year high against the euro in March – means European goods are relatively cheaper, which exporters are keen to take advantage of. "Being more customer oriented, focusing on branding, design and innovation, and persevering in export markets – all this should be taken into account if companies want to make the most of the favourable exchange rate," says FICE's director. "Export figures reflect one of the best years in the history of Spanish footwear and confirms that companies feel that looking abroad is a safe bet." 

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