

Five European countries have joined together to ensure knowledge is retained and that Europe continues to be the number one region for high-end manufacture.

Initiative secures luxury shoemaking skills

The first stages of a European project to preserve high-end shoemaking skills has drawn to a close, with organisers hoping the legacy will be a training scheme and online education portal that will help the continent preserve its status as the home of luxury shoemaking.

High-End Shoe is an initiative involving companies and footwear associations in France, Italy, Spain, Portugal and the Czech Republic to train young people in the art of ultra-high-end shoemaking and promote the sector's longevity.

Supported by a €435,000 grant from

the European Commission, representatives from Italy-based footwear academy Politecnico Calzaturiero, Portuguese counterpart CTCP, the European Confederation of the Footwear Industry (CEC), Lycée de Dauphiné (France), Instituto Tecnológico del Calzado (Spain) and the Czech Footwear and Leather Association (COKA) met regularly over the course of three years to develop the training material.

"We wanted to address the shortage of skills in the segment," explains Rita Souto from CTCP. "We hope the project will promote new talent, produce a new generation of highly skilled manufacturers and strengthen production across Europe."



Dolce & Gabbana shoes and bags on display in Milan, Italy.

CREDIT: CREATIVE LAB / SHUTTERSTOCK.COM

EU28 FOOTWEAR EXPORTS OUTSIDE EUROPE (2009-2016)

YEAR	No. 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%
% Variation 2016 vs 2009				39.9%	89.8%	35.7%

TURNOVER, EMPLOYEES AND ENTERPRISES IN EU28

CREDIT: EUROSTAT, SEPTEMBER 2017

Manufacture of footwear and footwear components (NACE C152)

YEAR	Turnover (millions €)	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

Value over volume

The organisations realise that if Europe can earn more per pair by producing luxury shoes, this could negate the slowdown in volumes that has been apparent since the economic downturn. Between 2009 and 2016, shoe exports from Europe increased 40% in quantity but 90% in value, with the average price rising from €28 to €38 in just seven years. In the four years from 2011 to 2015, European footwear manufacturers' turnover rose from €25 billion to €27 billion, and the number of businesses remained at around 21,000, according to figures from Eurostat.

"Millennial consumers are highly digital, global, more conscious consumers because they can access so much information on the net," says Carmen Arias, secretary general of CEC. "They learn from websites, they look for high quality, they are sensitive to sustainability. They want to know where the product and materials are from and whether the company has sustainable standards. We have seen this increasing over the past five years."

Footwear academy Politecnico Calzaturiero is based in the Vigonza, in the centre of one of the most important shoe-making districts in the world, where around 500 companies produce for the world's top brands. Its CEO, Stefano Miotto, says the district supports the same number of jobs now as it did before the financial crisis. "This is because companies made a strategic choice 20 years ago to produce high quality leather shoes," he explains. "As a result, all the big brands produce shoes in our district."

There are currently 300 students enrolled at the school as well as 50 teachers, who have contributed to High-End Shoe by hosting workshops. "Transferring skills is the reason the district grew," he says. "In the last 10 years, local enterprises have lost

FRATELLI BORGIOLO: INDUSTRY NEEDS TO ADAPT

The Fratelli Borgioli shoe factory in Vinci, Tuscany, has lent its support to the High-End Shoe project and is an example of the type of company that could benefit. "A good school tells young people that the shoe world is an exciting one to work in," says managing director Giacomo Fioravanti, the third generation of his family to run the business. "I was born into this world – when I was younger I used to run up and down the factory floor – but we have to teach outsiders why it is so special."

Established in 1946 by René and Valerio Borgioli, the company grew from two to 40 workers, and now has showrooms in Milan and New York. All materials, including leathers and components, are sourced within 30 kilometres of the workshop. Half the shoes are made for its own brand and half for international companies. "This makes things tricky as we have to prepare a lot of samples as well as six styles per brand," says Mr Fiovanti.

Ten years ago, the company started made-to-order for shoe shops and this has been extended to the consumer market, so customers can order bespoke shoes online.

"Passion is important for making high-end shoes," concludes Mr Fiovanti. "We are making shoes that people don't need, but they desire. We want to increasingly work with consumers, to explain about the material we use, how it is made and where it's from, and explain the difference between a high-quality shoe and a cheaper product."

their own brands, with 90% of production now for big companies. It's very difficult to sell high quality shoes without having a brand. On one hand, it's good in terms of employment, but on the other it's bad because there is no room for new enterprises – this is a challenge."

He hopes the High-End Shoe project will go some way to addressing the challenge. "We think manual work will grow because it is so specialised," he says. "It's very important to do this together, and after the project we will have a lot of know-how and material, and the ability to pass on the skills to make 'beyond luxury' shoes."

Changing market

While the way high-end, bespoke and handmade shoes are made has remained roughly the same for many years, the way shoe companies approach the market is changing rapidly.

For Giulio Finzi, secretary general of NETCOMM (Italian eCommerce Association), the most important place to focus on in terms of consumers is China, which will have the biggest group of new affluent people in the next 20 years, all buying luxury shoes through their mobiles. Bloggers' and influencers' pages have direct links to the products they promote, and he envisages there will be more shops following the style of M. Gemi model in New York, where customers can choose materials and order the shoes, and then have them delivered a number of weeks later.

"Shops won't disappear, but they need to change," he says. "If a shoe shop is the same as 10 or 20 years ago, it will close. For shoe producers, it is crucial to understand the evolution of the market."

Online retail and China offer big opportunities for European manufacturers, and the High-End Shoe project is an important way of upskilling workers to meet those demands, adds Ms Arias. "Many brands are coming out with second lines for those who would like the brand but at a lower price. This is good news in the sense that our companies can concentrate on added value and high value. Also, young consumers want something unique, so this creates opportunity for less well-known companies and products to shine."

Flexible learning

The result of the High-End Shoe project is a flexible online and workshop-based learning programme in six languages, covering everything from the design of the shoe, through last making, pattern making, material selection and assembly. Students, who need to have an understanding of the processes before embarking on the course, can access the 12 units online and complete 600 hours of training at their own pace. The hope is that on completion, they will be more attractive to employers and will be able to make their own prototypes.

Hugo Ferreira, owner of Portuguese footwear factory Calçado Centenário, says he supports the project as there is a shortage of young people looking to work in the shoe business at the top end of the market. "It's good that young people are taking on this project," he says. "If I have to employ someone, this qualification will be a plus point and nowadays everybody wants to create something different, and this could help our designers to achieve that."

To find out more about the project or sign up for the course, visit www.highendshoe.eu.



MICAM PLACES GREATER EMPHASIS ON HERITAGE

To highlight Italy as the home of high-end shoes, trade fair Micam created a separate area for global luxury brands for the first time in 2017, with many of those *World Footwear* spoke to keen on the idea of a specialist platform.

In February 2017, Fendi, Salvatore Ferragamo, Gucci, Prada and Tod's took stands for the first time, after Annarita Pilotti, president of footwear manufacturers association Assocalzaturifici, asked Tod's CEO Diego Della Valle to lend his support to the show and to convince his counterparts to do the same. At the September event they were joined by Giorgio Armani, Jimmy Choo, Sergio Rossi and Ermenegildo Zegna in a special zone in Hall 4.

Giorgio Armani showed the best of its new collection alongside some iconic styles of bags and shoes, made mainly from Italian leathers, but also with some satin and Swarovski crystal designs. As with the other luxury brands, the display was an opportunity to present the brand's message. "You cannot place orders here, it's just a window," explained account manager Juliet Willis, adding that it was important to attend Micam if its competitors had stands. "Giorgio Armani is known for clothing but we are trying to push accessories, as we would like to be known for accessories too." She added that shoes make up around 10% of sales and that rising leather prices over the past few years have not affected that segment of the market. "If our customers want something, they buy it. The quality, the design and the manufacturing are all more important."

The Gucci and Tod's stands highlighted one style of loafer in a range of colours and materials. Similarly, Dolce & Gabbana presented one style of lace stiletto with a buckle detail in 70 colours. Prada and Fendi's stands had no shoes but large screens showing the latest fashion shows and collections.

Cristiana Ricceri from Salvatore Ferragamo explained that the show had been an interesting way to promote some key new styles "Many of our existing clients come here and have called in to say hi and see the stand, even though they have already seen this collection in the showroom, but we have also seen potential buyers who have left business cards," she said.