

Executive Summary

**SPECIAL REPORT FOR STRENGTHENING THE OUTWARD
ORIENTATION OF BUSINESSES – FOOTWEAR &
LEATHER GOODS**

PROJECT TEAM

Executive Note

Special Report for Strengthening the Outward Orientation of Businesses: Footwear & Leather Goods

AT A GLANCE

Italy is Europe's most demanding footwear market and at the same time one of its largest buyers: it imports **EUR 7.76 billion** a year and pays for design, quality and documented origin, not for low price. The Greek share is just 0.47%, yet in leather footwear, the largest segment of the market, Greek exports **tripled in two years**. The local base in West Athens already exports. What is missing is not the product, it is **steady access to Italian buyers and the compliance file they ask for**.

EUR 7.76 bn

Italian footwear imports,
2023

40.2%

share of leather footwear
(EUR 3.1 bn)

x3

Greek leather footwear
exports to Italy, 2021-2023

0.47%

Greek share: the room for
growth

1. The opportunity: a large market that pays for quality

Italian footwear imports have grown by 5.1% a year on average since 2012 and reached EUR 7,758 million in 2023. The forecast for 2028 is around EUR 8,051 million: the market is not shrinking, it is stabilising at a high level.

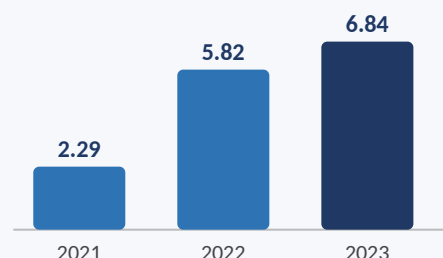
- **A market that judges quality.** Italy is the EU's leading footwear producer, with about 30% of EU output, a turnover of EUR 13.21 billion and exports of EUR 11.65 billion, and ranks second in the world by value in leather footwear, after China. The Italian buyer recognises and rewards a good product.
- **No duties, no customs.** Italy is inside the single market. Entry is decided on design, quality, delivery reliability and compliance.
- **European producers win on value.** Europe makes just 2.3% of the world's pairs of shoes but holds the premium end of the market. That is where the Greek SME competes too.

2. Where Greek footwear is already winning: leather footwear

Value in the Italian market is concentrated: leather footwear (heading 6403) reaches EUR 3,121 million, 40.2% of imports, and together with textile footwear (6404) 62.8%. That is exactly where Greek exports are rising steadily, from EUR 2.29 to 6.84 million in two years, while the overall Greek share moves with occasional orders (0.10% in 2021, 0.92% in 2022, 0.47% in 2023).

What it means: Greek footwear is gaining ground in the very category where Italy is a world leader, a strong signal of quality. Every 0.1 point of share in the leather segment is worth about EUR 3 million in sales.

Greek exports of leather footwear to Italy, EUR million



3. The local base: already exporting, ready to scale

About half of the recorded leather and leather goods businesses in West Athens already export. Around them operates a dense fabric of small footwear workshops that do not appear in published financial data, so the real base is wider. The intervention therefore does not start from zero: the aim is to steer existing exports towards the higher-value segment and to turn occasional orders into stable distribution relationships.

- **The gap is commercial, not productive.** International sales and negotiation show high demand and a high gap, while craftsmanship is under pressure from the ageing of skilled workers.
- **The path is realistic.** A Greek company in the sector has built, through international fairs, a network of more than 600 wholesale customers in Italy, Germany and Spain.

4. What the buyer asks for: compliance as a passport

In the single market the door is not opened by tariffs, it is opened by documentation. Five requirements already apply to every shoe sold in Italy and are checked before the first order:

Chromium VI below 3 mg/kg in leather (REACH)

CMR substances in textile parts (REACH)

Responsible economic operator and technical file (Reg. 2023/988, GPSR)

PAHs in plastic and rubber parts (REACH)

Composition labelling on every pair (Directive 94/11/EC)

Large European groups also pass on to their suppliers due diligence and leather traceability requirements, even where the law does not impose them directly on small businesses. Leather was removed from the deforestation regulation (EUDR) by an act of 13 July 2026, pending its publication. **Whoever has the file ready moves faster from contact to order, and documented traceability becomes a selling point.**

5. The entry path in five steps

1

Positioning
premium or
sustainable leather

2

Compliance
complete technical file

3

Fair and B2B
prepared meetings

4

Pilot partnership
one Italian distributor,
6-18 months

5

Scaling
stable distribution
relationships

The order has economic meaning: taking part in a fair without compliance and without ready B2B material produces contacts that do not become orders. A pilot partnership with one distributor before scaling keeps the commitment under control.

MICAM Milano

Mid and upper range. 1,758 brands from 51 countries, 40,449 visitors from 127 countries. Two editions a year.

Expo Riva Schuh & Gardabags

Mid range and volume. About 1,300 exhibitors, buyers from 111 countries. Two editions a year, January and June.

6. Seven recommendations with a clear order of priority

Recommendation	Horizon	Benefit for the business
1. Export readiness assessment and export plan	0-6 months	Right priorities, no premature spending
2. Export skills: B2B, delivery terms, documentation	Short term	Closing the commercial gap
3. Gateway fair with prepared B2B meetings	Two exhibition cycles a year	Access to Italian and European buyers
4. Positioning in premium and sustainable leather (6403)	Short to medium term	Differentiation from cost competition
5. Pilot partnership with an Italian distributor	6-18 months	Learning with controlled risk
6. Leather traceability and sustainability certification	Medium term	Entry into large buyers' networks
7. Stable distribution relationships and design houses	Medium to long term	From occasional to stable flows

The recommendations were tested against four scenarios, from European relocation of production to continued Asian dominance, with lax or strict sustainability rules. **Three actions pay off in every case:** fairs with B2B meetings, joining European distribution networks and design houses, and digital channels. Premium positioning and traceability pay off strongly when requirements tighten. So first what works everywhere, then what multiplies the return. Recommendations 1 to 3 are delivered by the Project Team and ASDA, 4, 5 and 7 are decisions of each business, and 6 requires collective organisation with a certification body.

7. How results will show

EUR 6.8 m Greek leather footwear exports to Italy, 2023 baseline	0.47% Greek share of Italian imports, 2023 baseline	~50% export-active businesses in the local base, baseline
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Progress is also tracked in the number of businesses that acquire an export plan, a complete compliance file and certified products.

8. The principal risk and the response

The risk is being drawn into price competition against Asian and Eastern European production, a field where the Greek SME has no sustainable advantage. European industry survived by moving up to high-value segments, not by cutting prices. **The response is built into the strategy: quality leather products, documented origin and collective organisation that makes the cost of compliance manageable.**

This Note summarises the Special Internationalisation Report for the footwear and leather goods sector (NACE 15). Every figure is documented in the Report together with its primary source. Sources: UN Comtrade, Assocalzaturifici, World Footwear, fair organisers, EU legislation. Single currency the euro, with conversion from dollars at the ECB annual average rate. No absolute figure for the local base is published, owing to the anonymity threshold of ten units.

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of Businesses: Footwear & Leather Goods**

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Υπηρεσίες Στήριξης Επιχειρήσεων Δυτικής Αθήνας

ΑΣΔΑ · Έργο Εξωστρέφειας (ΒΑΑ/ΟΧΕ) · MIS 6038821



Με τη συγχρηματοδότηση
της Ευρωπαϊκής Ένωσης



ΔΥΤΙΚΗΣ ΑΘΗΝΑΣ

