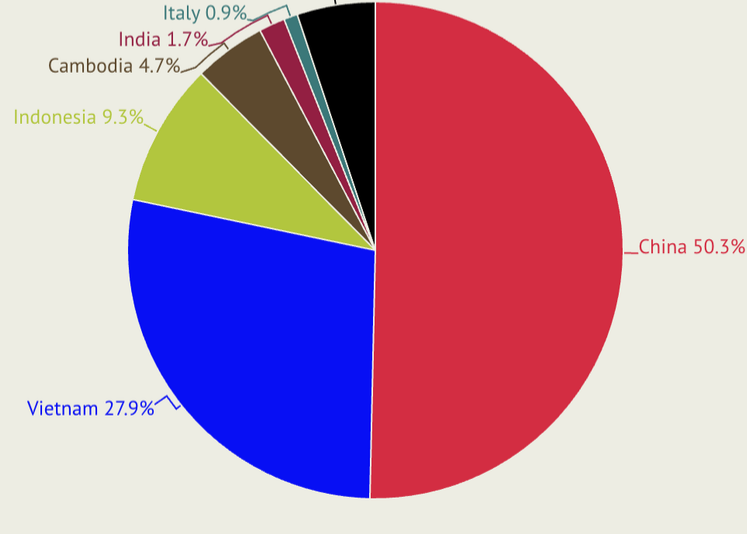


# FDRA SHOE SOURCING & SUPPLY CHAIN UPDATE

A <2 Minute Update on Supply Chain Costs and Shifts

## US Total Footwear Import Report

Distribution of YTD 2025 Total U.S. Footwear Import Volume



### Reflecting Shipments through June 2025

**By the numbers:** After expanding year over year for eleven straight months, both the *value* and *volume* of US footwear imports fell for the second straight month in June as duties paid on those imports soared.

**At \$2.2 billion**, the Customs value of shipments sank -1.0% from June 2024. Retreating -8.3%, the volume of imports fell even faster, but both lower only two of the last thirteen months.

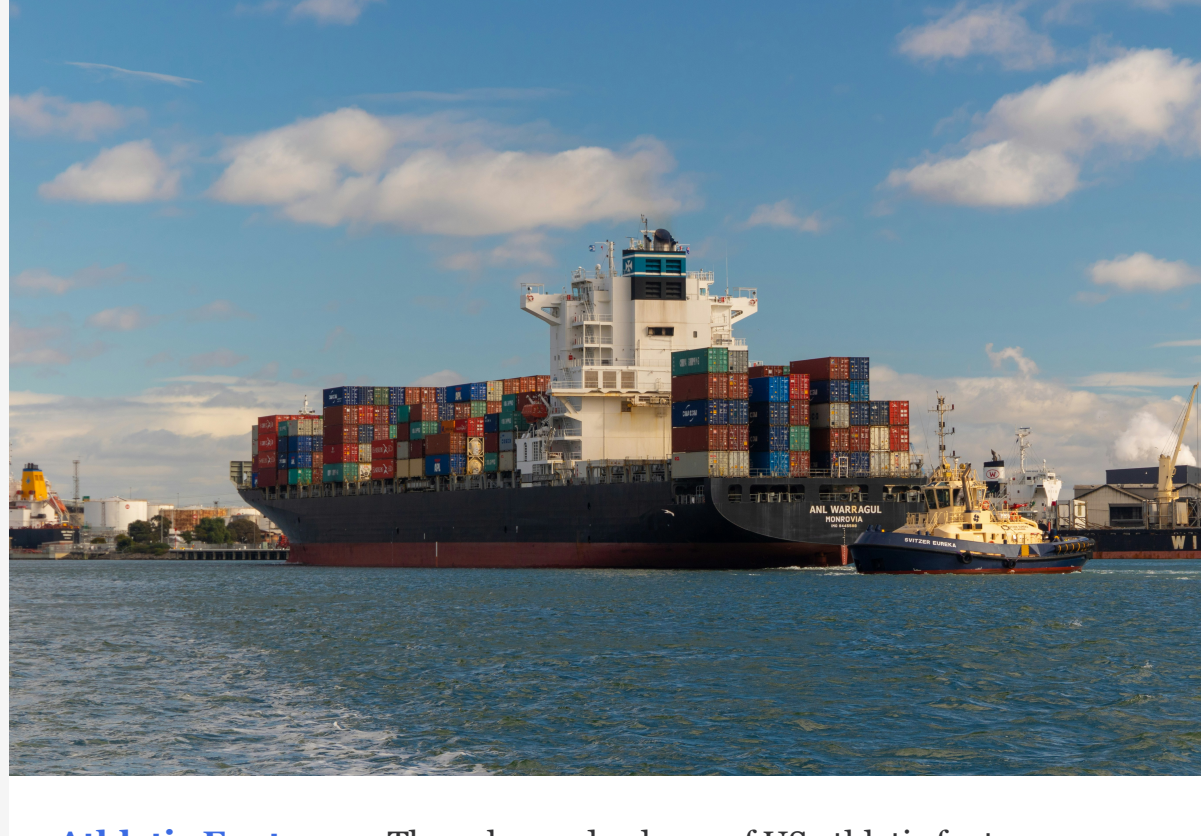
**Why it matters:** Despite [shoe store sales stubbornly on the defensive](#), footwear companies aggressively front-loaded imports before the tariff hikes took effect in order to stave off price increases to consumers.

- Retail footwear prices remain well contained for now.
- But we maintain our earlier caution that as these higher tariffs permeate the supply chain and footwear imports wane, footwear shoppers soon are likely to see higher prices at the store shelf.

**Go deeper:** [click for total footwear import data & graphs](#)



## U.S. Footwear Import Reports (by category)



**Athletic Footwear:** The value and volume of US athletic footwear imports both rebounded in June, up 9.6% year over year in value terms and 6.3% in volume terms, the seventeenth expansion in the last eighteen months for the latter.

**Men's Footwear:** Also under pressure from soaring duties, the volume and value of men's footwear imports budged little in June, fading -7.0% year over year in volume terms while rebounding a scant 1.9% in value terms.

**Women's Footwear:** Responding to *another* triple-digit surge in average duties per pair paid in June, the value and volume of women's footwear imports retreated year over year again in this latest month.

**Children's Footwear:** Value and volume of US children's footwear imports retreated year over year in June.

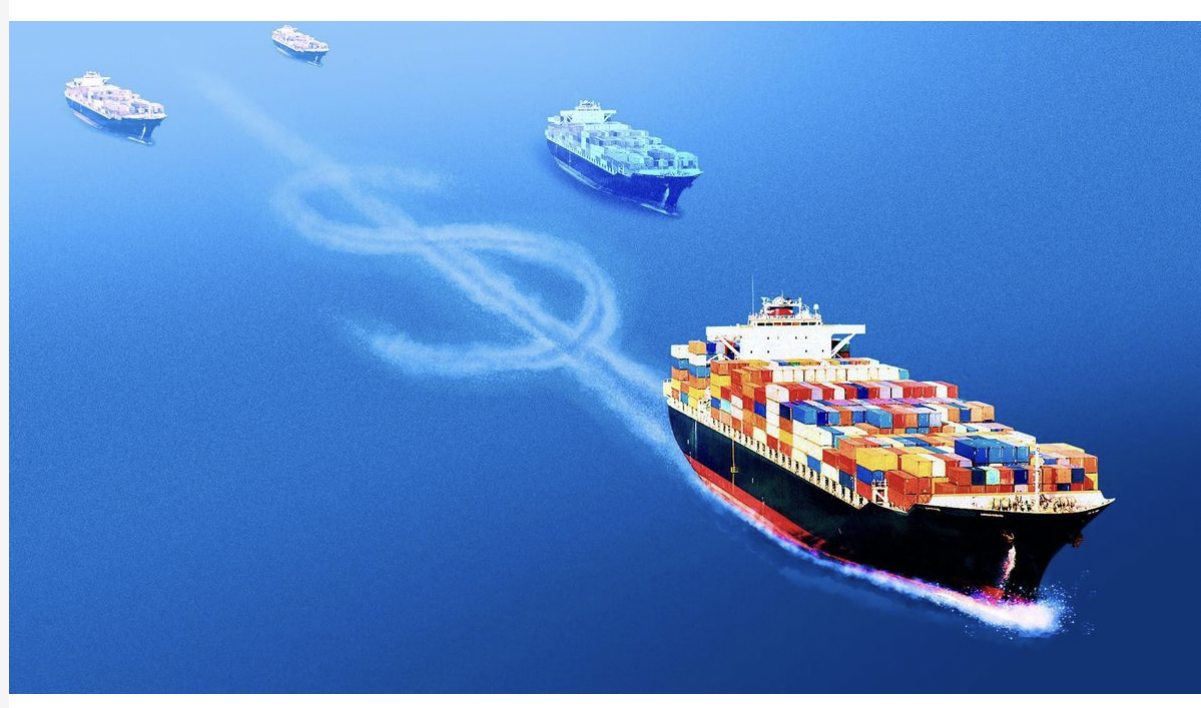
**Boots:** Bootwear imports diverged in June, rising 4.7% in value terms but sinking -2.9% in volume terms, the twenty-eighth drop in the last thirty-three months for the latter.

**Leather Footwear:** After sinking in May, the value and volume of leather footwear imports rebounded in June, rising year over year for most of the last sixteen months. The Customs value and volume both bounced 6.3%, despite duties paid soaring a record 122.3% from twelve months earlier.

**Sandals:** As tariffs on sandal imports jumped to a record in June, the *value* and *volume* of these imports budged little, rising a scant 0.4% in value terms while fading -6.7% in volume terms.



## Footwear Commodities Cost Report



**Highlight Issue -A current issue** that catches our attention this month: **Cattle & leather prices.** Nearby live cattle futures traded on the CME stretched to a record by late July before turning choppy as the estimated size of domestic beef production this year shrank again.

**Cotton/Textiles:** Mostly flat cotton prices from a month ago support our July view that the earlier upturn may have run out of steam.

**Ocean shipping costs:** Our July outlook for transpacific shipping rates to continue to edge lower remains on track, with container rates to the US East and West Coasts rivaling near-term lows.

**Oil:** Our earlier outlook for crude prices to drift flat to lower into 2026 remains on target, as prices for West Texas Intermediate (WTI) faded to a nine-week low less than \$63/barrel.

**Rubber:** Natural rubber prices turned flat to lower over the last month owing to weaker US vehicle sales, uncertainties from trade tariffs, the approaching peak of harvest, and weaker crude oil prices.

**Synthetic fiber costs:** Weaker crude oil prices, falling feedstock costs, persistent demand weakness, and ongoing market destocking are weighing on price ideas across a range of synthetic fibers.

**Go deeper:** [Read the full report here with charts & analysis](#)

