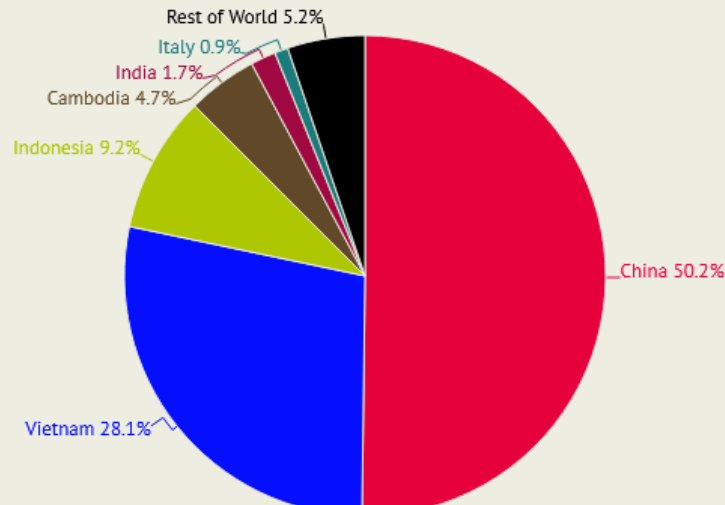


# FDRA SHOE SOURCING & SUPPLY CHAIN UPDATE

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 July 2025

**By the numbers:** As duties paid on footwear imports soared, both the *value* and *volume* of US footwear imports retreated for the third straight month in July.

**At \$2.4 billion**, the Customs value of shipments declined -3.8% from July 2024. Tumbling -11.8%, the volume of imports fell even faster, but both are lower only three of the last fourteen months.

**Why it matters:** We maintain our earlier caution that as earlier imports that were front-loaded before duties surged continue to wane and these higher duties permeate the supply chain, 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 grew again in July, up 12.1% year over year in value terms and 4.1% in volume terms, the eighteenth expansion in the last nineteen 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 July, fading -5.1% year over year in volume terms while climbing a scant 0.4% in value terms.

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

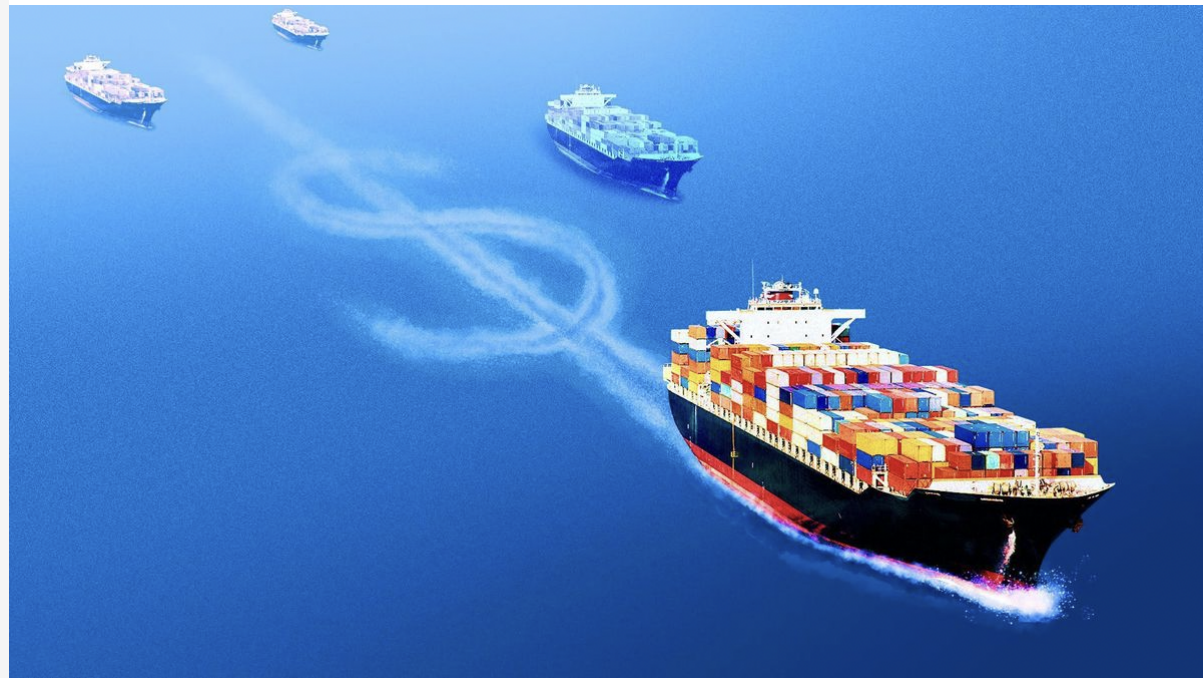
**Children's Footwear:** The value and volume of US children's footwear imports ebbed year over year again in July.

**Boots:** Bootwear imports sank again in July, fading -7.2% in value terms and -23.7% in volume terms.

**Leather Footwear:** After rebounding in June, the value and volume of leather footwear imports slid in July, only the third month of declines in the last eleven months. The Customs value eased less than -0.1% from a year earlier while the volume of shipments slipped -1.6%, owing in part to duties paid soaring 108.3% from twelve months earlier.

**Sandals:** As tariffs on sandal imports jumped to a record in July, the *value* and *volume* of these imports retreated again, declining -2.9% in value terms and -9.6% in volume terms.

## Footwear Commodities Cost Report



**Highlight Issue -A current issue** that catches our attention this month: Cattle & leather prices.

**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](#)

