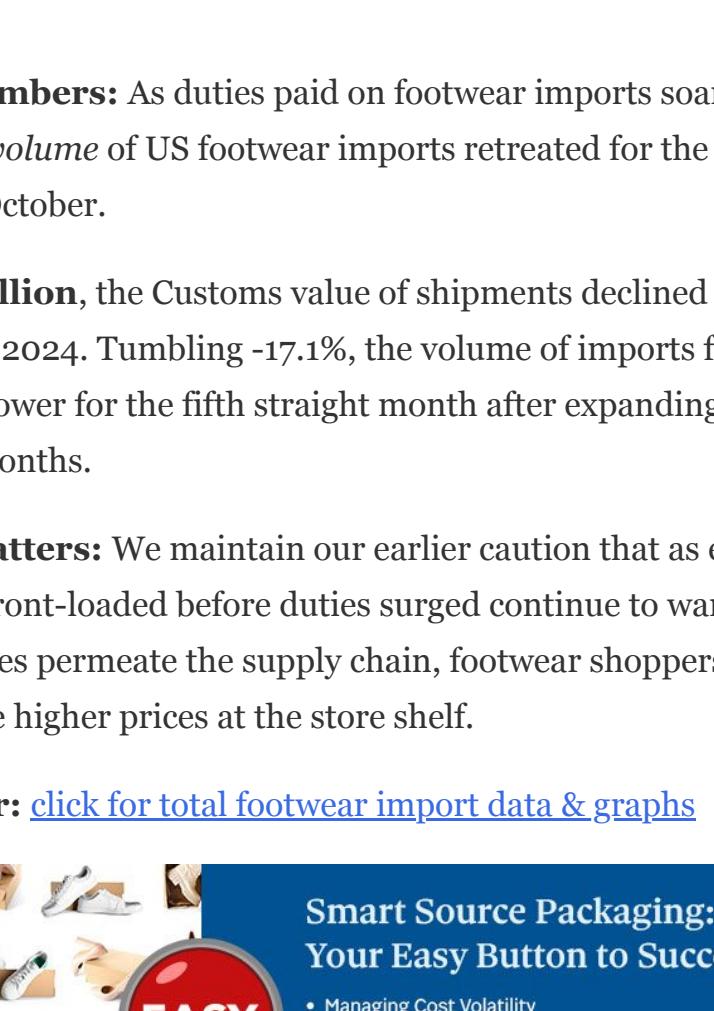


FDRA SHOE SOURCING & SUPPLY CHAIN UPDATE

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 October 2025

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

At \$2.4 billion, the Customs value of shipments declined -13.4% from September 2024. Tumbling -17.1%, the volume of imports fell even faster, with both lower for the fifth straight month after expanding for eleven previous 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.

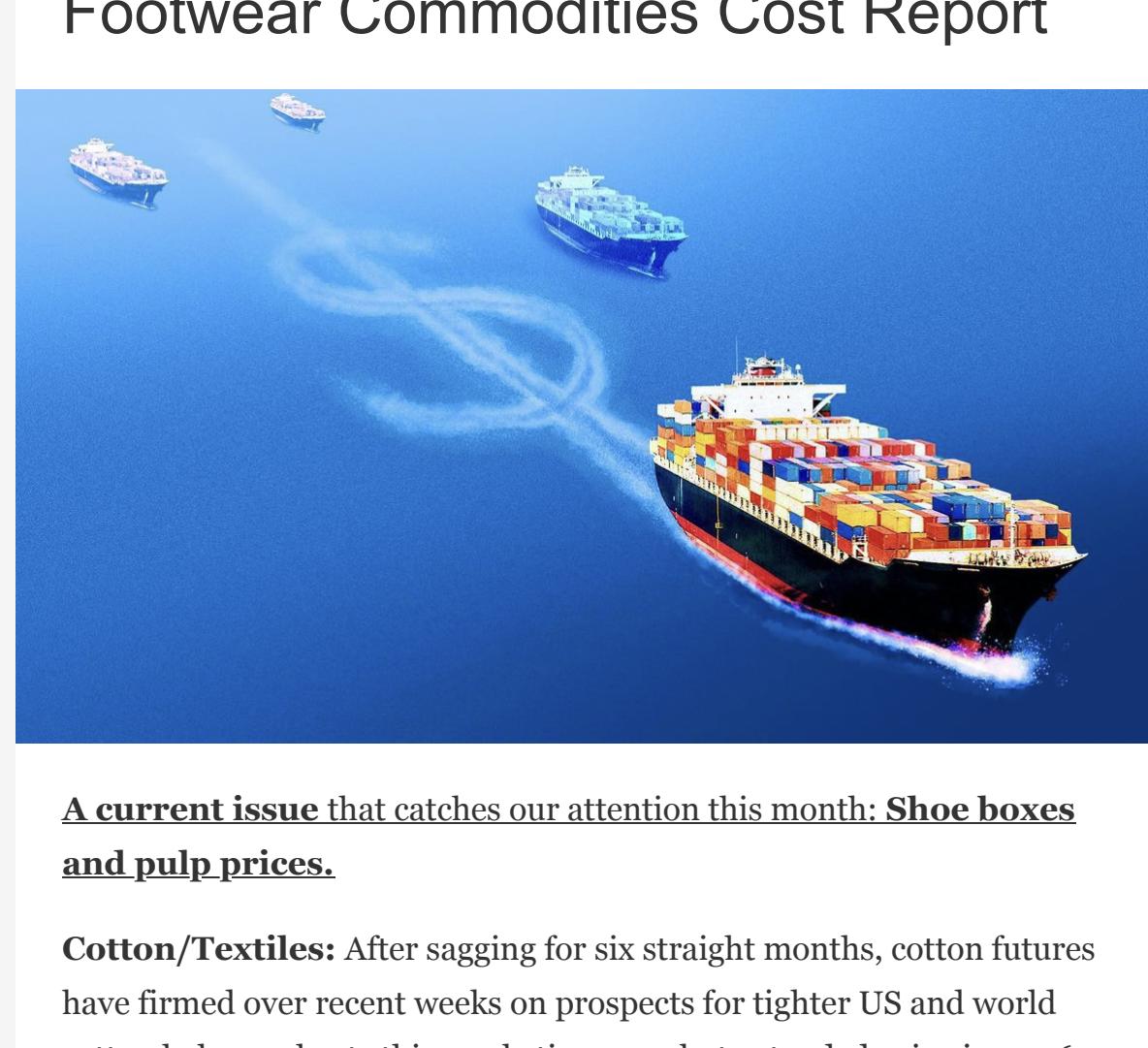
Go deeper: [click for total footwear import data & graphs](#)

Smart Source Packaging:
Your Easy Button to Success

- Managing Cost Volatility
- Audited Supplier Network
- Alternative Sourcing
- Ethical and Sustainable
- Quick Setup for New Countries

Trillora
Packaging Solutions

U.S. Footwear Import Reports (by category)



Athletic Footwear: The value and volume of US athletic footwear imports both faded again in October, off -16.5% year over year in value terms and -19.8% in volume terms.

Men's Footwear: Also under pressure from soaring duties, the volume and value of men's footwear imports tumbled again in October, falling -25.8% year over year in volume terms and -20.6% in value terms.

Women's Footwear: Responding to another triple-digit surge in average duties per pair paid in October, 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 plunged year over year in October. The value of imports tumbled -27.8% while the volume of these imports retreated -26.5%.

Boots: Declining for the thirty-second time in the last thirty-seven months, bootwear imports sank again in October, tumbling -21.1% in volume terms and -17.0% in value terms.

Leather Footwear: The value and volume of leather footwear imports retreated in October, as shipments saw another triple-digit surge in duties paid.

- The Customs value of these imports dropped -17.6% from a year earlier while the volume of shipments fell -22.7%.
- Meanwhile, duties paid soared 116.8% from twelve months earlier, the fifth straight triple-digit jump.

Sandals: As tariffs on sandal imports jumped to a near record in October, the *value* and *volume* of these imports retreated again, declining -11.3% in value terms and -17.4% in volume terms.

Footwear Commodities Cost Report

A current issue that catches our attention this month: **Shoe boxes and pulp prices**.

Cotton/Textiles: After sagging for six straight months, cotton futures have firmed over recent weeks on prospects for tighter US and world cotton balance sheets this marketing year, but extended gains in 2026 may prove limited without stronger demand for the fiber or a weaker dollar.

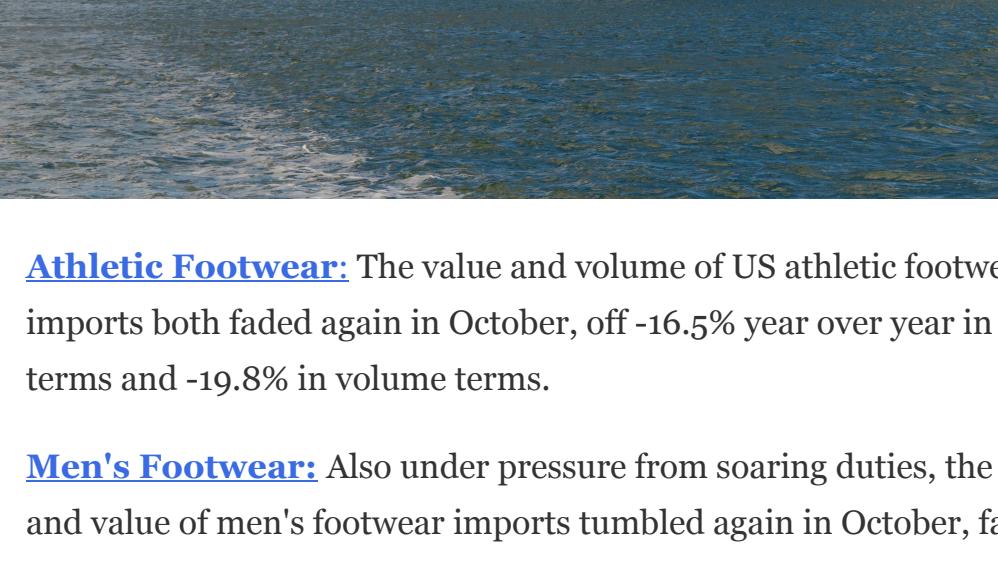
Leather: Since touching a near-term low in November, live cattle futures have rebounded appreciatively on prospects for tighter fed cattle supplies over the second half of 2026 while domestic demand remains solid.

Oil: The drumbeat of lower oil prices in 2026 remains the market's persistent cadence, despite crude edging higher over recent weeks.

Rubber: Rubber prices across key Asian markets continue to drift modestly higher since October.

Polyester Fiber & PET/Plastics: While most prices across the petrochemical supply chain generally tapered as the calendar turned to 2026, prices for some feedstocks and synthetic fibers surprised to the upside.

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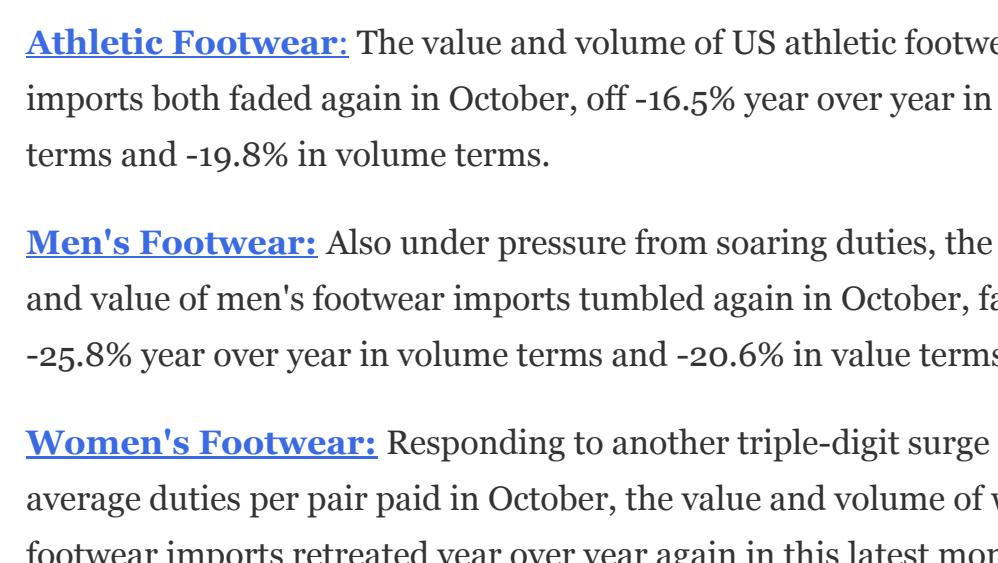
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