



Euromonitor
International

Africa's Fashion: A Tale of Diversity

December 2023

Table of Contents

INTRODUCTION

Scope

Executive summary

REGIONAL OVERVIEW

Sub-Saharan Africa's rapid economic growth offers fashion companies an attractive destination

While growth is positive, regional sales fluctuate, due to inflationary pressures

South Africa leads sales, driven by developed retail infrastructure

Footwear, followed by womenswear, leads sales across the region

Africa's diverse consumer profile has a significant impact on spending

Tailored purchasing plans bolster spending amid budget constraints

REGULATORY ENVIRONMENT AND ROUTE TO MARKET

Transnational trade agreements influence regional regulatory environment

Regional integration initiatives are expected to benefit the region

Countries use diverse approaches to protect and boost local clothing industries

Africa still lagging in global value chain due to labour shortage and underinvestments

Distribution complexity across the value chain complicates route to market

Second-hand is a key component of Africa's apparel and footwear market

Imports of unwanted clothes from the West have huge environmental cost

Vestiaire Collective x OR Foundation to raise awareness about fast fashion's negative impact

CONSUMER TRENDS SHAPING THE INDUSTRY

Consumers embrace research-driven shopping to identify the best value alternatives

Price sensitivity continues to influence consumer demand and shopping patterns

Value and discount segments lead sales in the region

Pepkor delivers value-driven fashion success in Sub-Saharan Africa

Evolving consumer preferences and the emergence of local footwear brands

Growing demand for luxury goods creates opportunities for local and international brands

Local luxury brands inspired by indigenous heritage are gaining traction

Technology is transforming the apparel and footwear competitive landscape

Retailers adopt innovative strategies to overcome digital transformation challenges

CONSUMER TRENDS SHAPING THE INDUSTRY – QSHOP

Qshop offers cost-effective e-commerce website solutions for African businesses

Fashion is increasingly becoming more inclusive to suit demographics across the region

CONSUMER TRENDS SHAPING THE INDUSTRY – JENDAYA

Jendaya shows that "just for me" options are gaining ground in emerging markets

CONSUMER TRENDS SHAPING THE INDUSTRY – RENDOLL

Rendoll offers more localised clothing ranges as consumers seek inclusivity

Sustainability is becoming increasingly important to consumers

Foschini's "Made in South Africa" sustainable initiative reduces production and lead times

COMPETITIVE LANDSCAPE

Diverse players cater to different segments of the consumer market throughout the region

Fragmentation drives competition and leads players to develop unique business models

Customisation, niche designers and digitalisation contribute to competitive advantage

Demand for second-hand clothing is driven by consumers across all income levels

COMPETITIVE LANDSCAPE – BUZIGAHILL

Buzigahill's "return to sender" reverse sourcing model transforms second-hand clothing market

Regional expansion by South African retailers across the region drives competition
Retailers struggle to balance brand positioning consistency with market adaptability

KEY TAKEAWAYS

Sub-Saharan Africa: Key Growth Categories to 2028

KEY TAKEAWAYS AND HOW TO WIN

Key takeaways and how to win in the apparel and footwear industry in Sub-Saharan Africa

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/africas-fashion-a-tale-of-diversity/report.