



# Passport

## Apparel Accessories in South Africa

Euromonitor International

November 2023

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Some content and data have been changed.

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# APPAREL ACCESSORIES IN SOUTH AFRICA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2023 DEVELOPMENTS

Apparel accessories perceived as non-essential for many south africans

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Accessories such as scarves, hats and gloves are mostly seasonal purchases

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Price-sensitive consumers tend to only buy apparel accessories on promotion

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## PROSPECTS AND OPPORTUNITIES

Apparel accessories struggle to adapt fast enough to meet current fashion trends

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Consumers increasingly seek fashionable statement pieces from apparel accessories

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Retail offline is key destination for consumers of apparel accessories

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### CATEGORY DATA

**Table 1 Sales of Apparel Accessories by Category: Volume 2018-2023**

'000 units	2018	2019	2020	2021	2022	2023
- Belts	<b>Data removed from sample</b>					
- Gloves						
- Hats/Caps						
- Scarves						
- Ties						
- Other Apparel Accessories						
Apparel Accessories						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 2 Sales of Apparel Accessories by Category: Value 2018-2023**

ZAR million	2018	2019	2020	2021	2022	2023
- Belts	<b>Data removed from sample</b>					
- Gloves						
- Hats/Caps						
- Scarves						

- Ties
- Other Apparel Accessories
- Apparel Accessories

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 Sales of Apparel Accessories by Category: % Volume Growth 2018-2023**

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
- Belts	<b>Data removed from sample</b>		
- Gloves			
- Hats/Caps			
- Scarves			
- Ties			
- Other Apparel Accessories			
Apparel Accessories			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Sales of Apparel Accessories by Category: % Value Growth 2018-2023**

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
- Belts	<b>Data removed from sample</b>		
- Gloves			
- Hats/Caps			
- Scarves			
- Ties			
- Other Apparel Accessories			
Apparel Accessories			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 NBO Company Shares of Apparel Accessories: % Value 2019-2023**

% retail value rsp Company	2019	2020	2021	2022	2023
<b>Data removed from sample</b>					

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 LBN Brand Shares of Apparel Accessories: % Value 2020-2023**

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
-----------------------------------	---------------	------	------	------	------

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 7 Forecast Sales of Apparel Accessories by Category: Volume 2023-2028**

'000 units	2023	2024	2025	2026	2027	2028
------------	------	------	------	------	------	------

- Belts	<b>Data removed from sample</b>					
- Gloves						
- Hats/Caps						

- Scarves
  - Ties
  - Other Apparel Accessories
- Apparel Accessories

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 8 Forecast Sales of Apparel Accessories by Category: Value 2023-2028**

ZAR million

	2023	2024	2025	2026	2027	2028
--	------	------	------	------	------	------

- Belts
  - Gloves
  - Hats/Caps
  - Scarves
  - Ties
  - Other Apparel Accessories
- Apparel Accessories

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 9 Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028**

% volume growth

	2023/24	2023-28 CAGR	2023/28 Total
--	---------	--------------	---------------

- Belts
  - Gloves
  - Hats/Caps
  - Scarves
  - Ties
  - Other Apparel Accessories
- Apparel Accessories

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 10 Forecast Sales of Apparel Accessories by Category: % Value Growth 2023-2028**

% constant value growth

	2023/2024	2023-28 CAGR	2023/28 Total
--	-----------	--------------	---------------

- Belts
  - Gloves
  - Hats/Caps
  - Scarves
  - Ties
  - Other Apparel Accessories
- Apparel Accessories

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources



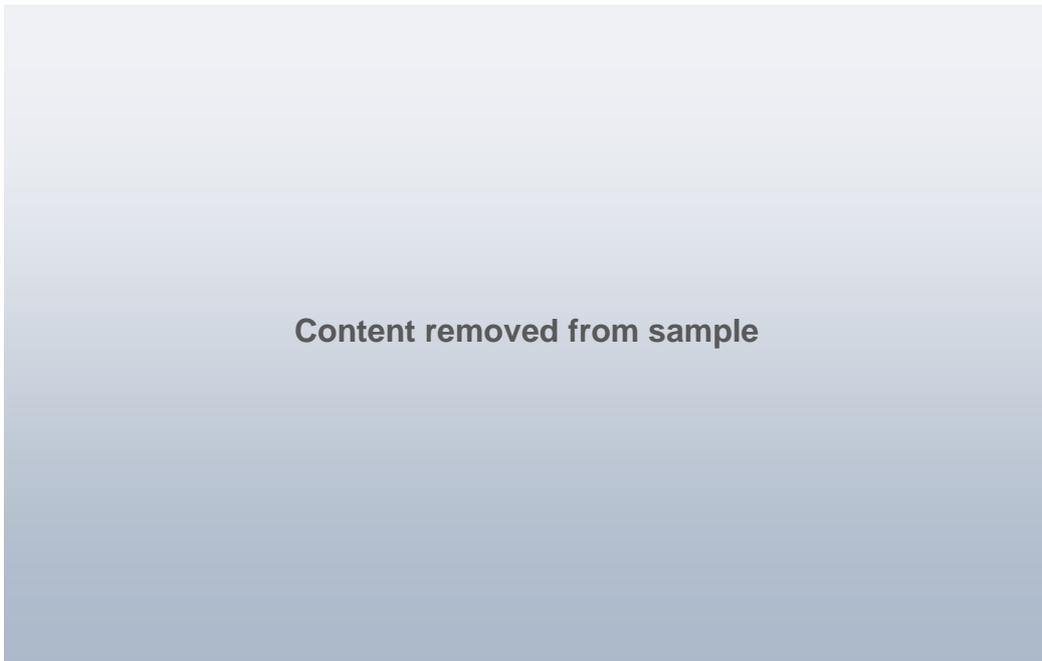
# APPAREL AND FOOTWEAR IN SOUTH AFRICA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture



2023 key trends



## Competitive landscape

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## Retailing developments

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## What next for apparel and footwear?

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## MARKET DATA

**Table 11 Sales of Apparel and Footwear by Category: Volume 2018-2023**

'000 units	2018	2019	2020	2021	2022	2023
Apparel	Data removed from sample					
Footwear						
Apparel and Footwear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Sportswear volume not researched

**Table 12 Sales of Apparel and Footwear by Category: Value 2018-2023**

ZAR million	2018	2019	2020	2021	2022	2023
Apparel	Data removed from sample					
Footwear						
Sportswear						
Apparel and Footwear						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 13 Sales of Apparel and Footwear by Category: % Volume Growth 2018-2023**

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Apparel	Data removed from sample		
Footwear			
Apparel and Footwear			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: Sportswear volume not researched

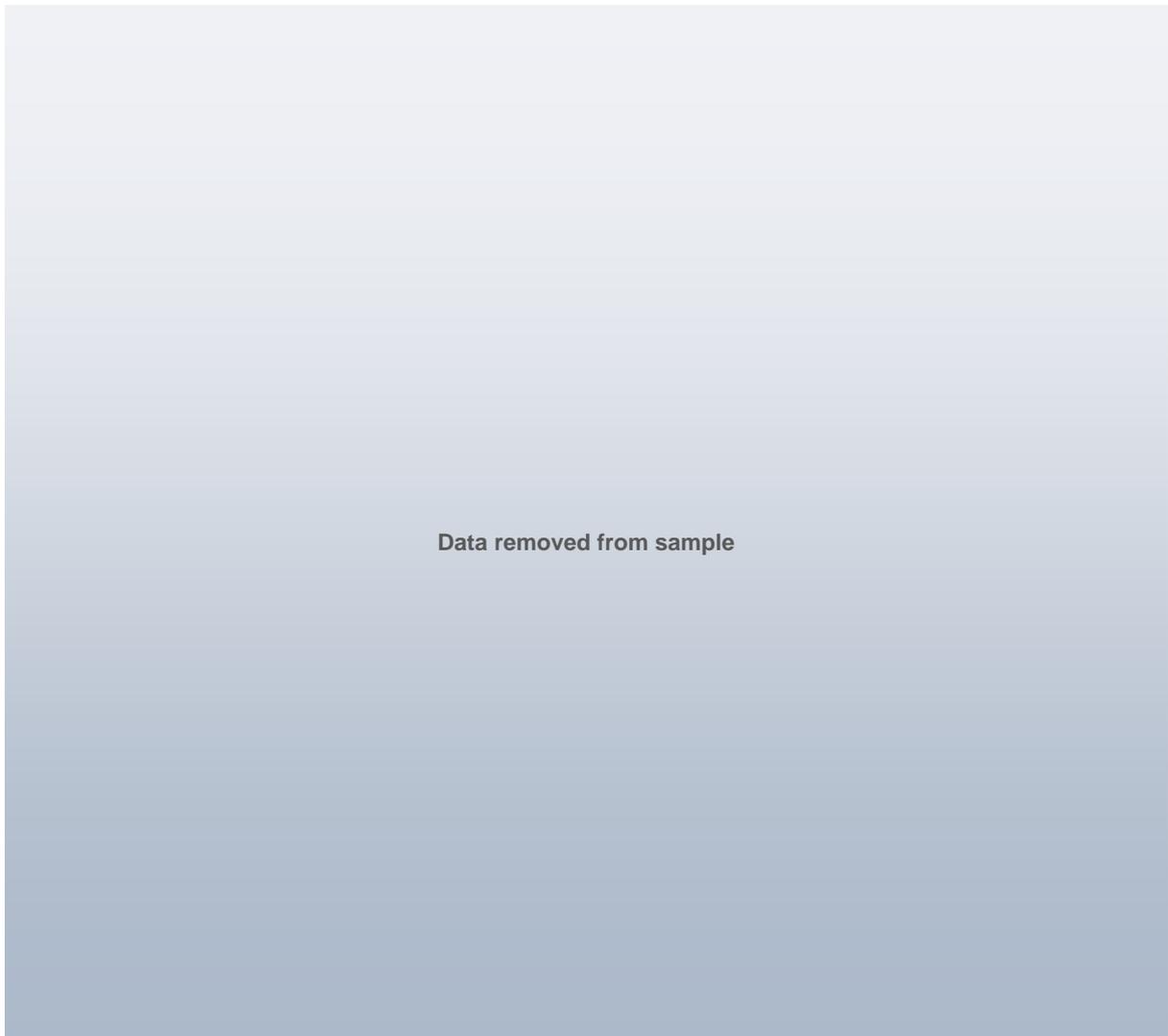
**Table 14 Sales of Apparel and Footwear by Category: % Value Growth 2018-2023**

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
Apparel	Data removed from sample		
Footwear			
Sportswear			
Apparel and Footwear			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 15 NBO Company Shares of Apparel and Footwear: % Value 2019-2023**

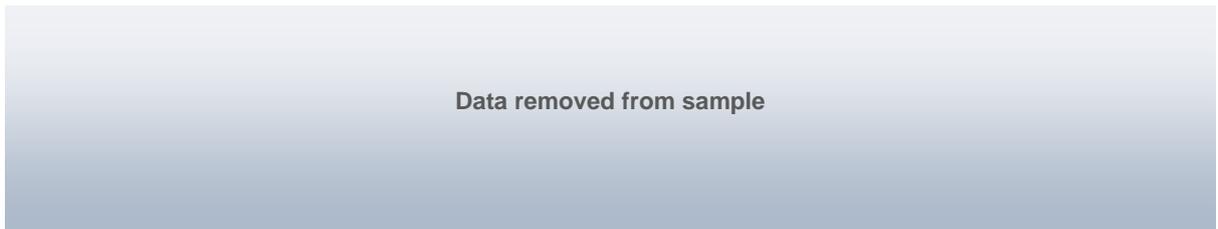
% retail value rsp Company	2019	2020	2021	2022	2023
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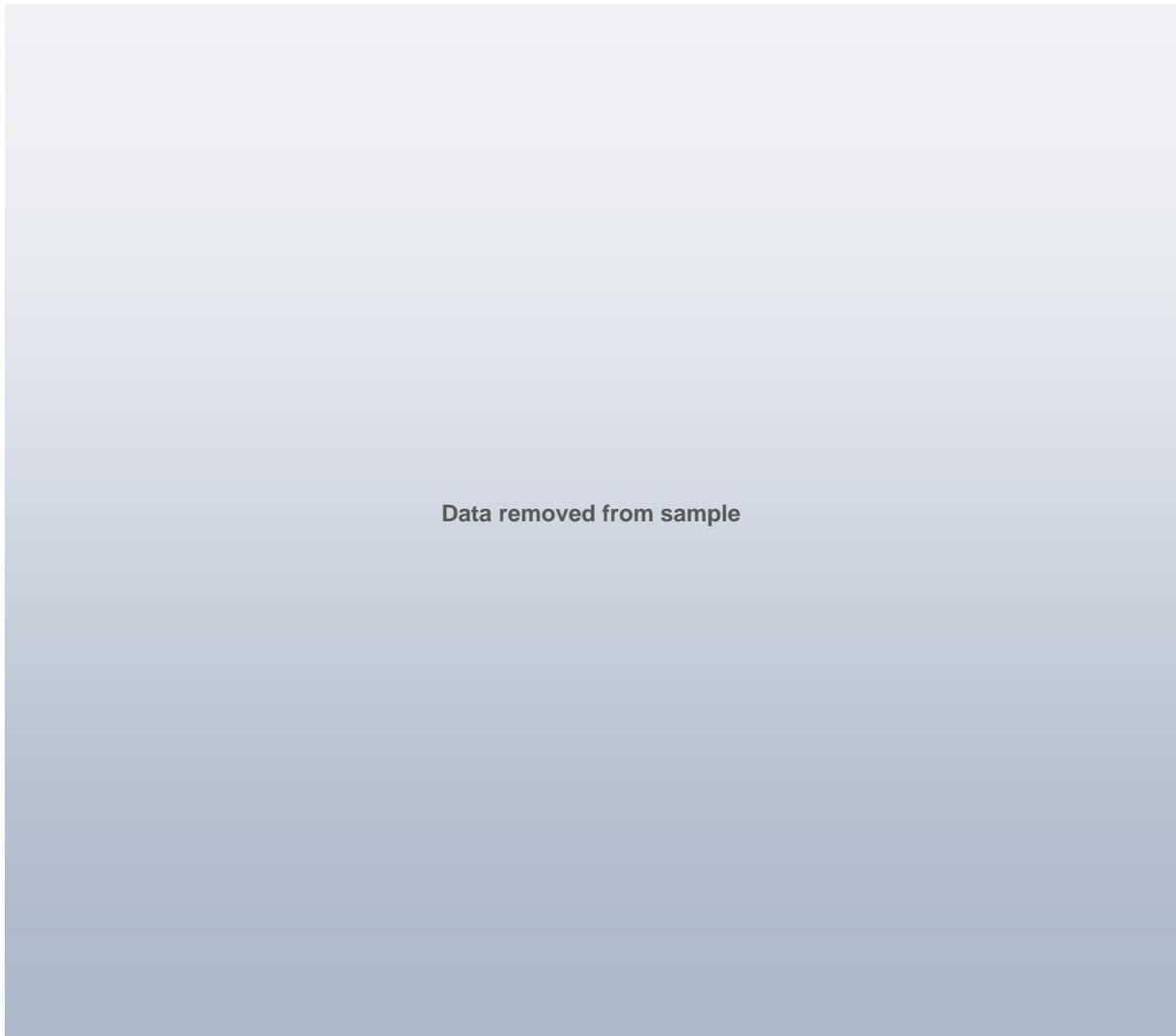


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 16 LBN Brand Shares of Apparel and Footwear: % Value 2020-2023**

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
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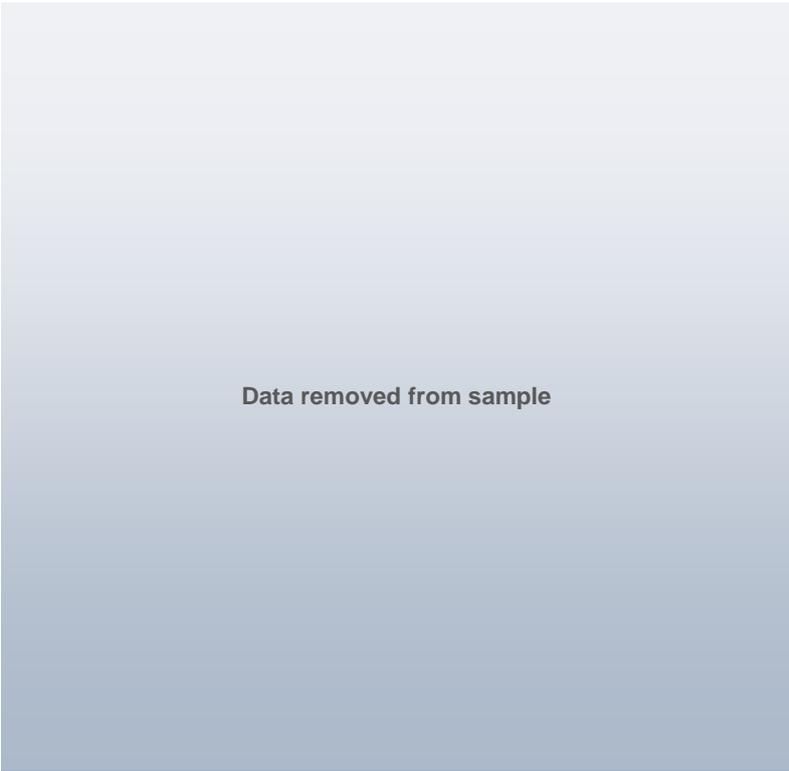


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 17** Distribution of Apparel and Footwear by Format: % Value 2018-2023

% retail value rsp	2018	2019	2020	2021	2022	2023
Retail Channels						
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
--- Supermarkets						
--- Hypermarkets						
--- Discounters						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						

- General Merchandise Stores
- Department Stores
- Variety Stores
- Apparel and Footwear Specialists
- Appliances and Electronics Specialists
- Home Products Specialists
- Health and Beauty Specialists
- Leisure and Personal Goods Specialists
- Bags and Luggage Specialists
- Jewellery and Watch Specialists
- Sports goods stores
- Traditional Toys and Games Stores
- Other Non-Grocery Retailers
- Vending
- Direct Selling
- Retail E-Commerce
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 18** Distribution of Apparel and Footwear by Format and Category: % Value 2023

% retail value rsp	Apparel	Footwear	Sportswear
Retail Channels	Data removed from sample		
- Retail Offline			
-- Grocery Retailers			
--- Convenience Retail			
--- Supermarkets			
--- Hypermarkets			
--- Discounters			
--- Warehouse Clubs			
--- Food/drink/tobacco specialists			
--- Small Local Grocers			
-- Non-Grocery Retailers			
--- General Merchandise Stores			
---- Department Stores			
---- Variety Stores			
--- Apparel and Footwear Specialists			
--- Appliances and Electronics Specialists			
--- Home Products Specialists			
--- Health and Beauty Specialists			
--- Leisure and Personal Goods Specialists			
---- Bags and Luggage Specialists			
---- Jewellery and Watch Specialists			
---- Sports goods stores			
---- Traditional Toys and Games Stores			

--- Other Non-Grocery Retailers  
 -- Vending  
 -- Direct Selling  
 - Retail E-Commerce  
 Total

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources  
 Key: AP = apparel; FW = footwear; SW = Sportswear

**Table 19 Forecast Sales of Apparel and Footwear by Category: Volume 2023-2028**

'000 units	2023	2024	2025	2026	2027	2028
Apparel	<b>Data removed from sample</b>					
Footwear	<b>Data removed from sample</b>					
Apparel and Footwear	<b>Data removed from sample</b>					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources  
 Note: Sportswear volume not researched

**Table 20 Forecast Sales of Apparel and Footwear by Category: Value 2023-2028**

ZAR million	2023	2024	2025	2026	2027	2028
Apparel	<b>Data removed from sample</b>					
Footwear	<b>Data removed from sample</b>					
Sportswear	<b>Data removed from sample</b>					
Apparel and Footwear	<b>Data removed from sample</b>					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 21 Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028**

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
Apparel	<b>Data removed from sample</b>		
Footwear	<b>Data removed from sample</b>		
Apparel and Footwear	<b>Data removed from sample</b>		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources  
 Note: Sportswear volume not researched

**Table 22 Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028**

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Apparel	<b>Data removed from sample</b>		
Footwear	<b>Data removed from sample</b>		

Sportswear  
Apparel and Footwear

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

### DISCLAIMER

Forecast closing date: 23 October 2023

Report closing date: 7 November 2023

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on [www.euromonitor.com](http://www.euromonitor.com) and via the Passport system, where new content is being added on a systematic basis.

### SOURCES

Sources used during research include the following:

#### Summary 1 Research Sources

Official Sources

[Redacted]

[Redacted]

Trade Associations

[Redacted]

[Redacted]

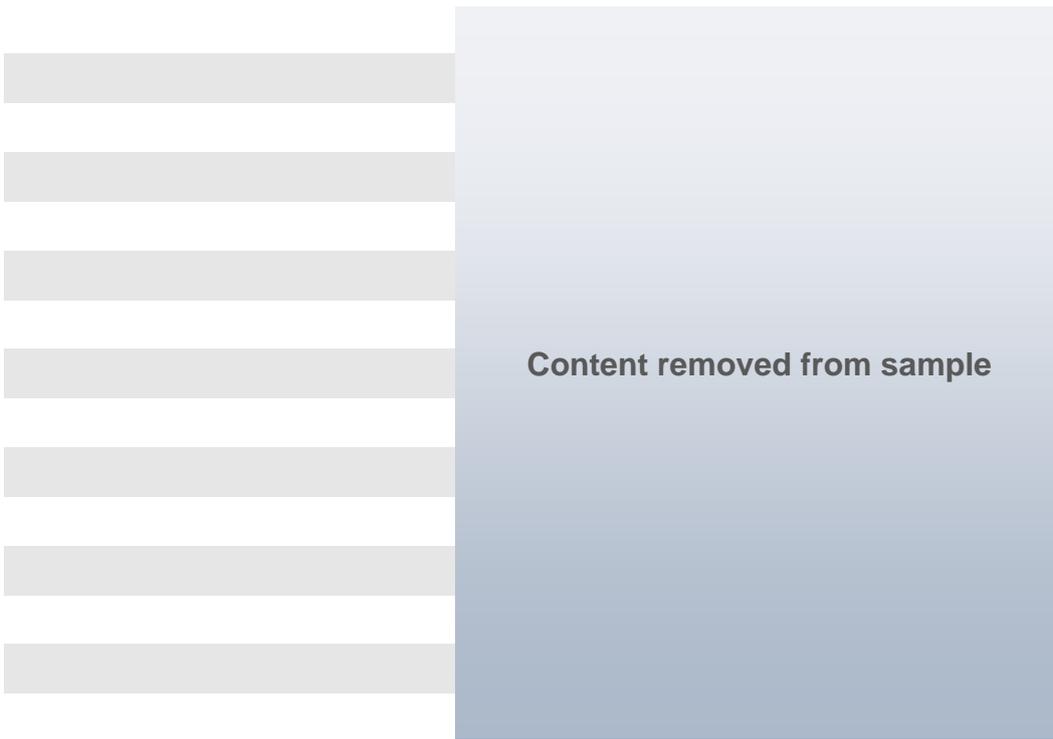
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Trade Press

[Redacted]

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Source: Euromonitor International