



Passport

Jeans in South Africa

Euromonitor International

November 2023

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purposes only.

Some content and data have been
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JEANS IN SOUTH AFRICA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

South africans trade down to more affordable jeans during inflationary period

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Shein poses a threat to local producers of jeans

Content removed from sample

More affluent consumers continue to drive demand for premium jeans

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PROSPECTS AND OPPORTUNITIES

Increasing demand for inclusive jeans among women in south africa

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Rising concerns among eco-conscious consumers over the use of denim for jeans

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Second-hand market to remain attractive for some jeans consumers

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CATEGORY DATA

Table 1 Sales of Jeans by Category: Volume 2018-2023

'000 units

	2018	2019	2020	2021	2022	2023
--- Economy Jeans	Data removed from sample					
--- Standard Jeans						
--- Premium Jeans						
--- Super Premium Jeans						
-- Jeans						

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

Table 2 Sales of Jeans by Category: Value 2018-2023

ZAR million	2018	2019	2020	2021	2022	2023
--- Economy Jeans	Data removed from sample					
--- Standard Jeans						
--- Premium Jeans						
--- Super Premium Jeans						
-- Jeans						

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

Table 3 Sales of Jeans by Category: % Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
--- Economy Jeans	Data removed from sample		
--- Standard Jeans			
--- Premium Jeans			
--- Super Premium Jeans			
-- Jeans			

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

Table 4 Sales of Jeans by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
--- Economy Jeans	Data removed from sample		
--- Standard Jeans			
--- Premium Jeans			
--- Super Premium Jeans			
-- Jeans			

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

Table 5 Sales of Men's Jeans by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
--- Men's Jeans	Data removed from sample					
---- Economy Men's Jeans						
---- Standard Men's Jeans						
---- Premium Men's Jeans						
---- Super Premium Men's Jeans						

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

Table 6 Sales of Men's Jeans by Category: Value 2018-2023

ZAR million	2018	2019	2020	2021	2022	2023
--- Men's Jeans	Data removed from sample					
---- Economy Men's Jeans						
---- Standard Men's Jeans						
---- Premium Men's Jeans						
---- Super Premium Men's Jeans						

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

Table 7 Sales of Men's Jeans by Category: % Volume Growth 2018-2023

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
--- Men's Jeans	Data removed from sample		
---- Economy Men's Jeans			
---- Standard Men's Jeans			
---- Premium Men's Jeans			
---- Super Premium Men's Jeans			

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

Table 8 Sales of Men's Jeans by Category: % Value Growth 2018-2023

% current value growth	2022/23	2018-23 CAGR	2018/23 Total
--- Men's Jeans	Data removed from sample		
---- Economy Men's Jeans			
---- Standard Men's Jeans			
---- Premium Men's Jeans			
---- Super Premium Men's Jeans			

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

Table 9 Sales of Women's Jeans by Category: Volume 2018-2023

'000 units	2018	2019	2020	2021	2022	2023
--- Women's Jeans	Data removed from sample					
---- Economy Women's Jeans						
---- Standard Women's Jeans						
---- Premium Women's						

Jeans
 ---- Super Premium
 Women's Jeans

Data removed from sample

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

Table 10 Sales of Women's Jeans by Category: Value 2018-2023

ZAR million

2018 2019 2020 2021 2022 2023

--- Women's Jeans
 ---- Economy Women's
 Jeans
 ---- Standard Women's
 Jeans
 ---- Premium Women's
 Jeans
 ---- Super Premium
 Women's Jeans

Data removed from sample

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

Table 11 Sales of Women's Jeans by Category: % Volume Growth 2018-2023

% volume growth

2022/23 2018-23 CAGR 2018/23 Total

--- Women's Jeans
 ---- Economy Women's Jeans
 ---- Standard Women's Jeans
 ---- Premium Women's Jeans
 ---- Super Premium Women's Jeans

Data removed from sample

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

Table 12 Sales of Women's Jeans by Category: % Value Growth 2018-2023

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

--- Women's Jeans
 ---- Economy Women's Jeans
 ---- Standard Women's Jeans
 ---- Premium Women's Jeans
 ---- Super Premium Women's Jeans

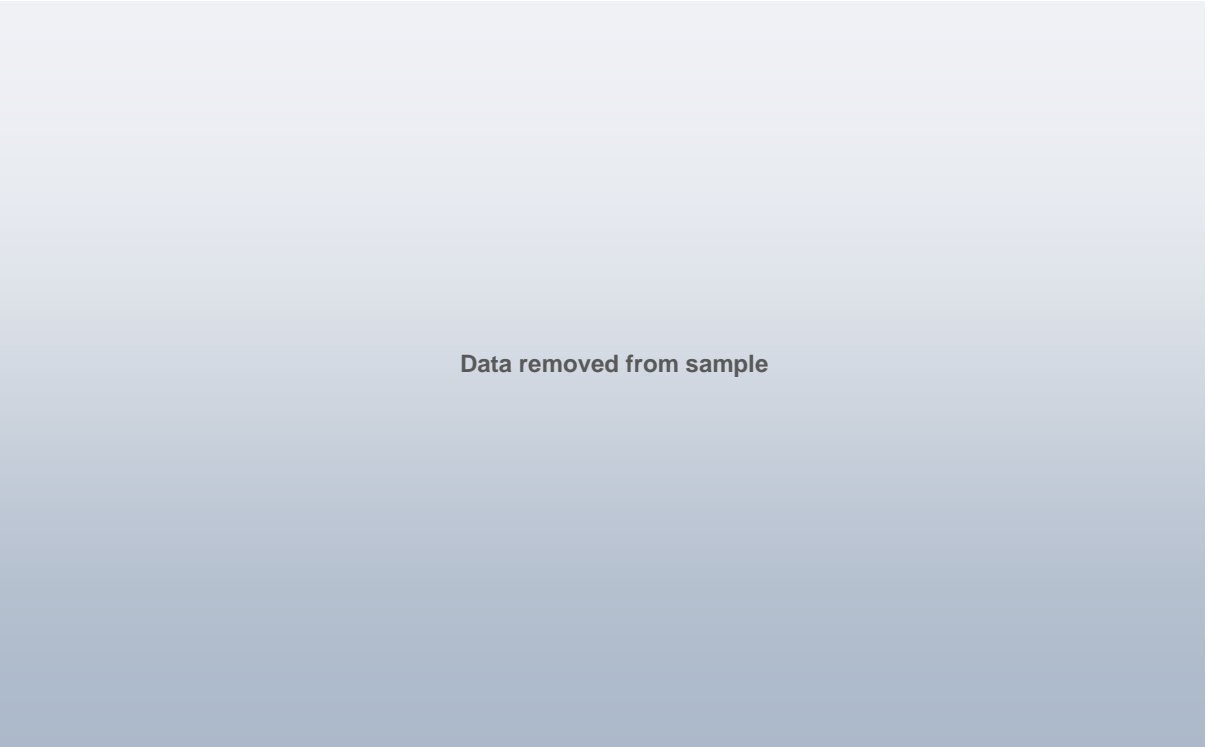
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 NBO Company Shares of Jeans: % Value 2019-2023

% retail value rsp
 Company

2019 2020 2021 2022 2023



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

Table 14 LBN Brand Shares of Jeans: % Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
Data removed from sample					

Data removed from sample

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

Table 15 Forecast Sales of Jeans by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
--- Economy Jeans	Data removed from sample					
--- Standard Jeans						
--- Premium Jeans						
--- Super Premium Jeans						
-- Jeans						

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

Table 16 Forecast Sales of Jeans by Category: Value 2023-2028

ZAR million	2023	2024	2025	2026	2027	2028
--- Economy Jeans	Data removed from sample					
--- Standard Jeans						
--- Premium Jeans						
--- Super Premium Jeans						
-- Jeans						

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

Table 17 Forecast Sales of Jeans by Category: % Volume Growth 2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
--- Economy Jeans	Data removed from sample		
--- Standard Jeans			
--- Premium Jeans			

--- Super Premium Jeans
-- Jeans

Data removed from sample

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

Table 18 Forecast Sales of Jeans by Category: % Value Growth 2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

--- Economy Jeans
--- Standard Jeans
--- Premium Jeans
--- Super Premium Jeans
-- Jeans

Data removed from sample

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

Table 19 Forecast Sales of Men's Jeans by Category: Volume 2023-2028

'000 units

2023 2024 2025 2026 2027 2028

--- Men's Jeans
---- Economy Men's Jeans
---- Standard Men's Jeans
---- Premium Men's Jeans
---- Super Premium Men's Jeans

Data removed from sample

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

Table 20 Forecast Sales of Men's Jeans by Category: Value 2023-2028

ZAR million

2023 2024 2025 2026 2027 2028

--- Men's Jeans
---- Economy Men's Jeans
---- Standard Men's Jeans
---- Premium Men's Jeans
---- Super Premium Men's Jeans

Data removed from sample

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

Table 21 Forecast Sales of Men's Jeans by Category: % Volume Growth 2023-2028

% volume growth

2023/24 2023-28 CAGR 2023/28 Total

--- Men's Jeans
---- Economy Men's Jeans

Data removed from sample

---- Standard Men's Jeans
 ---- Premium Men's Jeans
 ---- Super Premium Men's Jeans

Data removed from sample

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

Table 22 Forecast Sales of Men's Jeans by Category: % Value Growth 2023-2028

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

--- Men's Jeans
 ---- Economy Men's Jeans
 ---- Standard Men's Jeans
 ---- Premium Men's Jeans
 ---- Super Premium Men's Jeans

Data removed from sample

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

Table 23 Forecast Sales of Women's Jeans by Category: Volume 2023-2028

'000 units

2023 2024 2025 2026 2027 2028

--- Women's Jeans
 ---- Economy Women's Jeans
 ---- Standard Women's Jeans
 ---- Premium Women's Jeans
 ---- Super Premium Women's Jeans

Data removed from sample

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

Table 24 Forecast Sales of Women's Jeans by Category: Value 2023-2028

ZAR million

2023 2024 2025 2026 2027 2028

--- Women's Jeans
 ---- Economy Women's Jeans
 ---- Standard Women's Jeans
 ---- Premium Women's Jeans
 ---- Super Premium Women's Jeans

Data removed from sample

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

Table 25 Forecast Sales of Women's Jeans by Category: % Volume Growth 2023-2028

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
--- Women's Jeans	Data removed from sample		
---- Economy Women's Jeans			
---- Standard Women's Jeans			
---- Premium Women's Jeans			
---- Super Premium Women's Jeans			

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

Table 26 Forecast Sales of Women's Jeans by Category: % Value Growth 2023-2028

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
--- Women's Jeans	Data removed from sample		
---- Economy Women's Jeans			
---- Standard Women's Jeans			
---- Premium Women's Jeans			
---- Super Premium Women's Jeans			

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

APPAREL AND FOOTWEAR IN SOUTH AFRICA - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture

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2023 key trends

Content removed from sample

Competitive landscape

Content removed from sample

Retailing developments

Content removed from sample

What next for apparel and footwear?

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MARKET DATA

Table 27 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 28 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 29 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 30 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 31 NBO Company Shares of Apparel and Footwear: % Value 2019-2023

% retail value rsp
Company

2019

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 32 LBN Brand Shares of Apparel and Footwear: % Value 2020-2023

% retail value rsp
Brand (GBO)

Company (NBO)

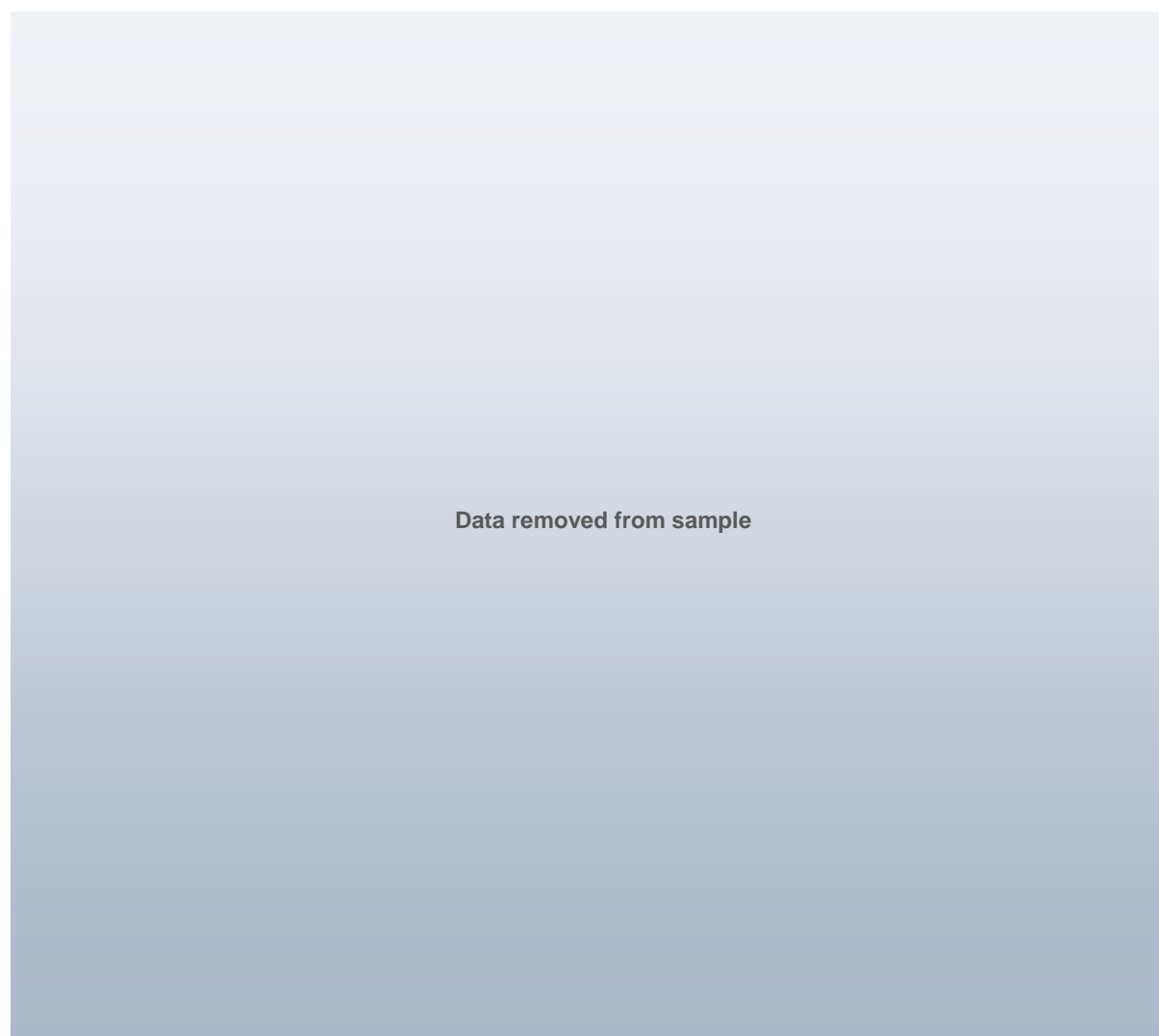
2020

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 33 Distribution of Apparel and Footwear by Format: % Value 2018-2023

% retail value rsp	2018	2019	2020	2021	2022	2023
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

Table 34 Distribution of Apparel and Footwear by Format and Category: % Value 2023

% retail value rsp

Apparel

Footwear

Sportswear

- 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

Data removed from sample

--- 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 35 Forecast Sales of Apparel and Footwear by Category: Volume 2023-2028

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

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

Note: Sportswear volume not researched

Table 36 Forecast Sales of Apparel and Footwear by Category: Value 2023-2028

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

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

Table 37 Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028

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

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

Note: Sportswear volume not researched

Table 38 Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028

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

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

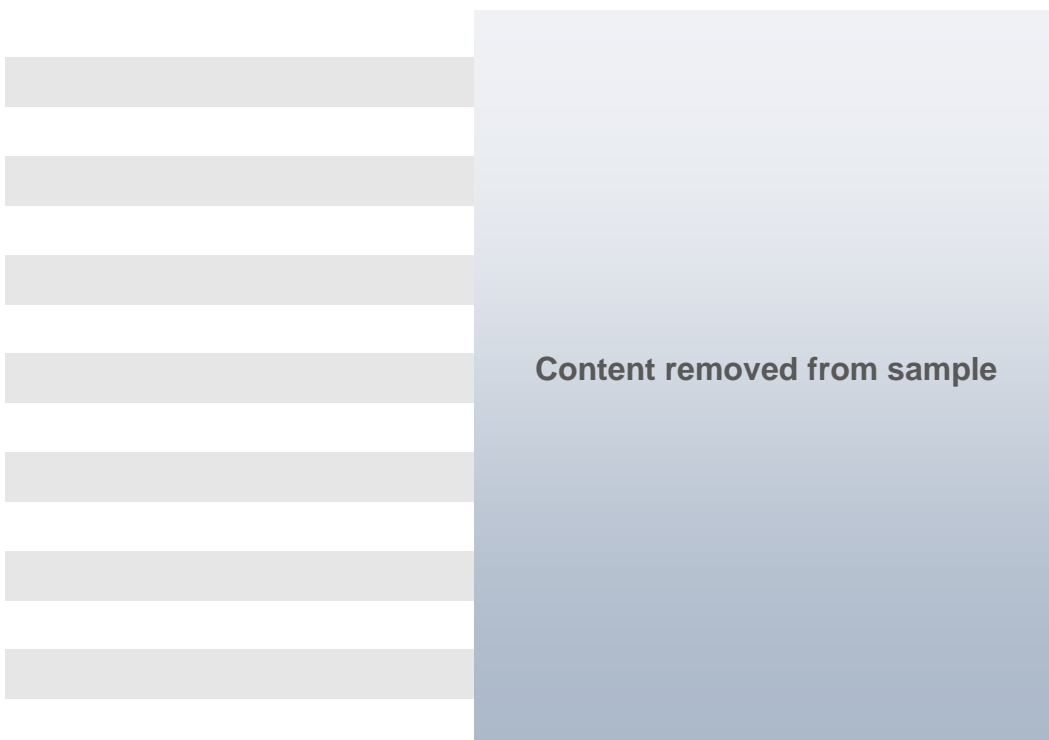
Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on www.euromonitor.com 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	Content removed from sample
Trade Associations	
Trade Press	



Source: Euromonitor International