



Apparel and Footwear in Malaysia

November 2023

Table of Contents

Apparel and Footwear in Malaysia

EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture
2023 key trends
Competitive landscape
Retailing developments
What next for apparel and footwear?

MARKET DATA

Table 1 - Sales of Apparel and Footwear by Category: Volume 2018-2023
Table 2 - Sales of Apparel and Footwear by Category: Value 2018-2023
Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2018-2023
Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2018-2023
Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2019-2023
Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2020-2023
Table 7 - Distribution of Apparel and Footwear by Format: % Value 2018-2023
Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2023
Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2023-2028
Table 10 - Forecast Sales of Apparel and Footwear by Category: Value 2023-2028
Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028
Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Childrenswear in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Childrenswear players offer price discounts in order to generate consumer interest
Cross-collaboration collections featuring licensed characters form part of business marketing strategies
Fast fashion players continue to enjoy success due to competitive prices and frequent new launches

PROSPECTS AND OPPORTUNITIES

E-commerce penetration will increase within childrenswear, although retailers will continue to invest in bricks-and-mortar stores as consumers return to shopping centres
Evolution of children's sportswear will result in opening of more standalone stores offering children's sportswear
Childrenswear brands will continue to use licenced characters to appeal to young consumers

CATEGORY DATA

Table 13 - Sales of Childrenswear by Category: Volume 2018-2023
Table 14 - Sales of Childrenswear by Category: Value 2018-2023
Table 15 - Sales of Childrenswear by Category: % Volume Growth 2018-2023
Table 16 - Sales of Childrenswear by Category: % Value Growth 2018-2023
Table 17 - NBO Company Shares of Childrenswear: % Value 2019-2023
Table 18 - LBN Brand Shares of Childrenswear: % Value 2020-2023
Table 19 - Forecast Sales of Childrenswear by Category: Volume 2023-2028
Table 20 - Forecast Sales of Childrenswear by Category: Value 2023-2028
Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2023-2028
Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2023-2028

Apparel Accessories in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Continued healthy growth for apparel accessories, thanks to return to busy pre-pandemic lifestyles, and return of consumers to shopping malls
Stylish hijabs boost growth in scarves
Brands seek to expand their audiences through collaboration marketing

PROSPECTS AND OPPORTUNITIES

Premiumisation to elevate value growth in scarves, as hijabs become fashion accessories
Discounting will remain relevant marketing tactic in ties and belts
Growing number of brands will turn to personalisation as key marketing strategy

CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2018-2023
Table 24 - Sales of Apparel Accessories by Category: Value 2018-2023
Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2018-2023
Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2018-2023
Table 27 - NBO Company Shares of Apparel Accessories: % Value 2019-2023
Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2020-2023
Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2023-2028
Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2023-2028
Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028
Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2023-2028

Menswear in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Return of pre-pandemic lifestyles, combined with rise of Korean streetwear culture helps to sustain growth in 2023
Brand collaborations emerge as key marketing strategy
Sustainability is embraced by menswear players

PROSPECTS AND OPPORTUNITIES

Strengthening competitiveness among hugely available streetwear brands in menswear, influenced largely by Korean and Japanese culture
Discounts will remain key to generating sales amongst price-conscious consumers
Sustainability and functionality will continue as common themes

CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2018-2023
Table 34 - Sales of Menswear by Category: Value 2018-2023
Table 35 - Sales of Menswear by Category: % Volume Growth 2018-2023
Table 36 - Sales of Menswear by Category: % Value Growth 2018-2023
Table 37 - NBO Company Shares of Menswear: % Value 2019-2023
Table 38 - LBN Brand Shares of Menswear: % Value 2020-2023
Table 39 - NBO Company Shares of Men's Nightwear: % Value 2019-2023
Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2020-2023
Table 41 - NBO Company Shares of Men's Outerwear: % Value 2019-2023
Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2020-2023
Table 43 - NBO Company Shares of Men's Swimwear: % Value 2019-2023
Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2020-2023
Table 45 - NBO Company Shares of Men's Underwear: % Value 2019-2023

- Table 46 - LBN Brand Shares of Men's Underwear: % Value 2020-2023
- Table 47 - Forecast Sales of Menswear by Category: Volume 2023-2028
- Table 48 - Forecast Sales of Menswear by Category: Value 2023-2028
- Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2023-2028
- Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2023-2028

Womenswear in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Continued recovery for womenswear, in line with restoration of busy pre-pandemic lifestyles
- Second-hand clothing proves to be attractive to budget-conscious consumers
- Local womenswear brands invest in launch of sustainable clothing ranges to cater to rising demand from younger generation

PROSPECTS AND OPPORTUNITIES

- International fashion brands to target Malaysians with more localised offerings
- Collaborations are expected to continue apace
- Sustainability will remain a key area of focus

CATEGORY DATA

- Table 51 - Sales of Womenswear by Category: Volume 2018-2023
- Table 52 - Sales of Womenswear by Category: Value 2018-2023
- Table 53 - Sales of Womenswear by Category: % Volume Growth 2018-2023
- Table 54 - Sales of Womenswear by Category: % Value Growth 2018-2023
- Table 55 - NBO Company Shares of Womenswear: % Value 2019-2023
- Table 56 - LBN Brand Shares of Womenswear: % Value 2020-2023
- Table 57 - NBO Company Shares of Women's Nightwear: % Value 2019-2023
- Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2020-2023
- Table 59 - NBO Company Shares of Women's Outerwear: % Value 2019-2023
- Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2020-2023
- Table 61 - NBO Company Shares of Women's Swimwear: % Value 2019-2023
- Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2020-2023
- Table 63 - NBO Company Shares of Women's Underwear: % Value 2019-2023
- Table 64 - LBN Brand Shares of Women's Underwear: % Value 2020-2023
- Table 65 - Forecast Sales of Womenswear by Category: Volume 2023-2028
- Table 66 - Forecast Sales of Womenswear by Category: Value 2023-2028
- Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2023-2028
- Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2023-2028

Jeans in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

- High cost of living boost sales of economy and standard jeans ranges
- Sustainability becomes a more important factor in consumers' purchasing decisions
- Levi's consolidates its position through new launches, personalised shopping experiences and collaborations

PROSPECTS AND OPPORTUNITIES

- Expansion of fast-fashion brands in economy and standard jeans, although international niche jeans brands will also gain traction
- Denim will continue its sustainable journey
- Personalisation will be a growing trend

CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2018-2023
 Table 70 - Sales of Jeans by Category: Value 2018-2023
 Table 71 - Sales of Jeans by Category: % Volume Growth 2018-2023
 Table 72 - Sales of Jeans by Category: % Value Growth 2018-2023
 Table 73 - Sales of Men's Jeans by Category: Volume 2018-2023
 Table 74 - Sales of Men's Jeans by Category: Value 2018-2023
 Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2018-2023
 Table 76 - Sales of Men's Jeans by Category: % Value Growth 2018-2023
 Table 77 - Sales of Women's Jeans by Category: Volume 2018-2023
 Table 78 - Sales of Women's Jeans by Category: Value 2018-2023
 Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2018-2023
 Table 80 - Sales of Women's Jeans by Category: % Value Growth 2018-2023
 Table 81 - NBO Company Shares of Jeans: % Value 2019-2023
 Table 82 - LBN Brand Shares of Jeans: % Value 2020-2023
 Table 83 - Forecast Sales of Jeans by Category: Volume 2023-2028
 Table 84 - Forecast Sales of Jeans by Category: Value 2023-2028
 Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2023-2028
 Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2023-2028
 Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2023-2028
 Table 88 - Forecast Sales of Men's Jeans by Category: Value 2023-2028
 Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2023-2028
 Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2023-2028
 Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2023-2028
 Table 92 - Forecast Sales of Women's Jeans by Category: Value 2023-2028
 Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2023-2028
 Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2023-2028

Hosiery in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increased demand for hosiery, in light of return to outdoor activities
 Functionality emerges as a key theme in non-sheer hosiery
 Local hosiery brands produce fun designs to appeal to the younger generation

PROSPECTS AND OPPORTUNITIES

Price discounts will remain key to stimulating sales of non-sheer hosiery
 Hosiery from sportswear brands anticipated to enjoy stronger growth
 Larger number of hosiery brands to pursue online-only model

CATEGORY DATA

Table 95 - Sales of Hosiery by Category: Volume 2018-2023
 Table 96 - Sales of Hosiery by Category: Value 2018-2023
 Table 97 - Sales of Hosiery by Category: % Volume Growth 2018-2023
 Table 98 - Sales of Hosiery by Category: % Value Growth 2018-2023
 Table 99 - NBO Company Shares of Hosiery: % Value 2019-2023
 Table 100 - LBN Brand Shares of Hosiery: % Value 2020-2023
 Table 101 - Forecast Sales of Hosiery by Category: Volume 2023-2028
 Table 102 - Forecast Sales of Hosiery by Category: Value 2023-2028
 Table 103 - Forecast Sales of Hosiery by Category: % Volume Growth 2023-2028
 Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2023-2028

Footwear in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Women's footwear and men's footwear sustained double digit growth to boost recovery to reach pre-pandemic level

Entrance of various international sportswear brands lead to high growth in sports footwear

Strong personalisation and ergonomic footwear gaining traction in Malaysia in conjunction with the rise in health-conscious consumers

PROSPECTS AND OPPORTUNITIES

Retail expansion, growing sneaker culture and premiumisation will be key trends driving growth in footwear

Collaborations will generate consumer interest

Functionality will be a key feature of new product launches

CATEGORY DATA

Table 105 - Sales of Footwear by Category: Volume 2018-2023

Table 106 - Sales of Footwear by Category: Value 2018-2023

Table 107 - Sales of Footwear by Category: % Volume Growth 2018-2023

Table 108 - Sales of Footwear by Category: % Value Growth 2018-2023

Table 109 - NBO Company Shares of Footwear: % Value 2019-2023

Table 110 - LBN Brand Shares of Footwear: % Value 2020-2023

Table 111 - Distribution of Footwear by Format: % Value 2018-2023

Table 112 - Forecast Sales of Footwear by Category: Volume 2023-2028

Table 113 - Forecast Sales of Footwear by Category: Value 2023-2028

Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2023-2028

Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2023-2028

Sportswear in Malaysia

KEY DATA FINDINGS

2023 DEVELOPMENTS

Performance apparel and performance footwear lead growth through constant new launches and embracing of sneaker culture

International sportswear brands target Malaysian expansion

Decathlon expands into Northern Region

PROSPECTS AND OPPORTUNITIES

Sports footwear will see healthy growth, driven primarily by strong athleisure trend and continuation of sneaker culture among Malaysians

More standalone sportswear stores are anticipated to open their doors in the short -term

More sportswear brands to focus on sustainability

CATEGORY DATA

Table 116 - Sales of Sportswear by Category: Value 2018-2023

Table 117 - Sales of Sportswear by Category: % Value Growth 2018-2023

Table 118 - NBO Company Shares of Sportswear: % Value 2019-2023

Table 119 - LBN Brand Shares of Sportswear: % Value 2020-2023

Table 120 - Distribution of Sportswear by Format: % Value 2018-2023

Table 121 - Forecast Sales of Sportswear by Category: Value 2023-2028

Table 122 - Forecast Sales of Sportswear by Category: % Value Growth 2023-2028

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/apparel-and-footwear-in-malaysia/report.