

# Retail E-Commerce in South Africa

May 2025

**Table of Contents** 

## Retail E-Commerce in South Africa - Category analysis

#### **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Retail e-commerce benefits from diversified offerings SARS introduces new regulations for cross-border e-commerce Takealot divests Superbalist to focus on marketplace offerings

#### PROSPECTS AND OPPORTUNITIES

Retail e-commerce will remain one of the fastest growing channels BNPL will continue driving e-commerce sales as awareness increases New regulation will give a competitive advantage to local operators

#### CHANNEL DATA

Table 1 - Retail E-Commerce by Channel: Value 2019-2024

Table 2 - Retail E-Commerce by Channel: % Value Growth 2019-2024

Table 3 - Retail E-Commerce by Product: Value 2019-2024

Table 4 - Retail E-Commerce by Product: % Value Growth 2019-2024

Table 5 - Retail E-Commerce GBO Company Shares: % Value 2020-2024

Table 6 - Retail E-Commerce GBN Brand Shares: % Value 2021-2024

Table 7 - Forecast Retail E-Commerce by Channel: Value 2024-2029

Table 8 - Forecast Retail E-Commerce by Channel: % Value Growth 2024-2029

Table 9 - Forecast Retail E-Commerce by Product: Value 2024-2029

Table 10 - Forecast Retail E-Commerce by Product: % Value Growth 2024-2029

## Retail in South Africa - Industry Overview

#### **EXECUTIVE SUMMARY**

Retail in 2024: The big picture

Competition intensifies, leading to a more consolidated market

SARS introduces new regulation for cross-border e-commerce

What next for retail?

#### OPERATING ENVIRONMENT

Informal retail

Opening hours for physical retail

Summary 1 - Standard Opening Hours by Channel Type 2024

Seasonality

Christmas

Back to School

## MARKET DATA

Table 11 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2019-2024

Table 12 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2019-2024

Table 13 - Sales in Retail Offline by Channel: Value 2019-2024

Table 14 - Sales in Retail Offline by Channel: % Value Growth 2019-2024

Table 15 - Retail Offline Outlets by Channel: Units 2019-2024

Table 16 - Retail Offline Outlets by Channel: % Unit Growth 2019-2024

Table 17 - Sales in Retail E-Commerce by Product: Value 2019-2024

Table 18 - Sales in Retail E-Commerce by Product: % Value Growth 2019-2024

Table 19 - Grocery Retailers: Value Sales, Outlets and Selling Space 2019-2024

Table 20 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024

Table 21 - Sales in Grocery Retailers by Channel: Value 2019-2024

- Table 22 Sales in Grocery Retailers by Channel: % Value Growth 2019-2024
- Table 23 Grocery Retailers Outlets by Channel: Units 2019-2024
- Table 24 Grocery Retailers Outlets by Channel: % Unit Growth 2019-2024
- Table 25 Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2019-2024
- Table 26 Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2019-2024
- Table 27 Sales in Non-Grocery Retailers by Channel: Value 2019-2024
- Table 28 Sales in Non-Grocery Retailers by Channel: % Value Growth 2019-2024
- Table 29 Non-Grocery Retailers Outlets by Channel: Units 2019-2024
- Table 30 Non-Grocery Retailers Outlets by Channel: % Unit Growth 2019-2024
- Table 31 Retail GBO Company Shares: % Value 2020-2024
- Table 32 Retail GBN Brand Shares: % Value 2021-2024
- Table 33 Retail Offline GBO Company Shares: % Value 2020-2024
- Table 34 Retail Offline GBN Brand Shares: % Value 2021-2024
- Table 35 Retail Offline LBN Brand Shares: Outlets 2021-2024
- Table 36 Retail E-Commerce GBO Company Shares: % Value 2020-2024
- Table 37 Retail E-Commerce GBN Brand Shares: % Value 2021-2024
- Table 38 Grocery Retailers GBO Company Shares: % Value 2020-2024
- Table 39 Grocery Retailers GBN Brand Shares: % Value 2021-2024
- Table 40 Grocery Retailers LBN Brand Shares: Outlets 2021-2024
- Table 41 Non-Grocery Retailers GBO Company Shares: % Value 2020-2024
- Table 42 Non-Grocery Retailers GBN Brand Shares: % Value 2021-2024
- Table 43 Non-Grocery Retailers LBN Brand Shares: Outlets 2021-2024
- Table 44 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2024-2029
- Table 45 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2024-2029
- Table 46 Forecast Sales in Retail Offline by Channel: Value 2024-2029
- Table 47 Forecast Sales in Retail Offline by Channel: % Value Growth 2024-2029
- Table 48 Forecast Retail Offline Outlets by Channel: Units 2024-2029
- Table 49 Forecast Retail Offline Outlets by Channel: % Unit Growth 2024-2029
- Table 50 Forecast Sales in Retail E-Commerce by Product: Value 2024-2029
- Table 51 Forecast Sales in Retail E-Commerce by Product: % Value Growth 2024-2029
- Table 52 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029
- Table 53 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029
- Table 54 Forecast Sales in Grocery Retailers by Channel: Value 2024-2029
- Table 55 Forecast Sales in Grocery Retailers by Channel: % Value Growth 2024-2029
- Table 56 Forecast Grocery Retailers Outlets by Channel: Units 2024-2029
- Table 57 Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2024-2029
- Table 58 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2024-2029
- Table 59 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2024-2029
- Table 60 Forecast Sales in Non-Grocery Retailers by Channel: Value 2024-2029
- Table 61 Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2024-2029
- Table 62 Forecast Non-Grocery Retailers Outlets by Channel: Units 2024-2029
- Table 63 Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2024-2029

### DISCLAIMER

#### SOURCES

Summary 2 - Research Sources

## 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/retail-e-commerce-in-south-africa/report.