



Passport

Menswear in South Africa

Euromonitor International

November 2023

This sample report is for illustration
purposes only.

Some content and data have been
changed.

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MENSWEAR IN SOUTH AFRICA - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2023 DEVELOPMENTS

Men's formal wear experiences further declines amid casual wear trends

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Many local consumers seek value for money when choosing menswear

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Conscious consumers demand more sustainable menswear options

Content removed from sample

Content removed from sample

PROSPECTS AND OPPORTUNITIES

Greater willingness to invest in staple wardrobe items that offer longevity

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Casual wear will remain predominant style in terms of menswear

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Consumers will continue to make impulse purchases

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CATEGORY DATA

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

'000 units	2018	2019	2020	2021	2022	2023
-- Men's Nightwear	Data removed from sample					
-- Men's Outerwear						
--- Men's Jeans						

---- Economy Men's Jeans
 ---- Standard Men's Jeans
 ---- Premium Men's Jeans
 ---- Super Premium
 Men's Jeans
 --- Men's Outerwear
 (Excl Jeans)
 ---- Men's Jackets and
 Coats
 ---- Men's Jumpers
 ---- Men's Shirts
 ---- Men's Shorts and
 Trousers
 ---- Men's Suits
 ---- Men's Tops
 ---- Other Men's
 Outerwear
 -- Men's Swimwear
 -- Men's Underwear
 - Menswear

Data removed from sample

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

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

ZAR million

2018 2019 2020 2021 2022 2023

-- Men's Nightwear
 -- Men's Outerwear
 --- Men's Jeans
 ---- Economy Men's Jeans
 ---- Standard Men's Jeans
 ---- Premium Men's Jeans
 ---- Super Premium
 Men's Jeans
 --- Men's Outerwear
 (Excl Jeans)
 ---- Men's Jackets and
 Coats
 ---- Men's Jumpers
 ---- Men's Shirts
 ---- Men's Shorts and
 Trousers
 ---- Men's Suits
 ---- Men's Tops
 ---- Other Men's
 Outerwear
 -- Men's Swimwear
 -- Men's Underwear
 - Menswear

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 Menswear by Category: % Volume Growth 2018-2023

% volume growth

	2022/23	2018-23 CAGR	2018/23 Total
-- Men's Nightwear	Data removed from sample		
-- Men's Outerwear			
--- Men's Jeans			
---- Economy Men's Jeans			
---- Standard Men's Jeans			
---- Premium Men's Jeans			
---- Super Premium Men's Jeans			
--- Men's Outerwear (Excl Jeans)			
---- Men's Jackets and Coats			
---- Men's Jumpers			
---- Men's Shirts			
---- Men's Shorts and Trousers			
---- Men's Suits			
---- Men's Tops			
---- Other Men's Outerwear			
-- Men's Swimwear			
-- Men's Underwear			
- Menswear			

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

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

% current value growth

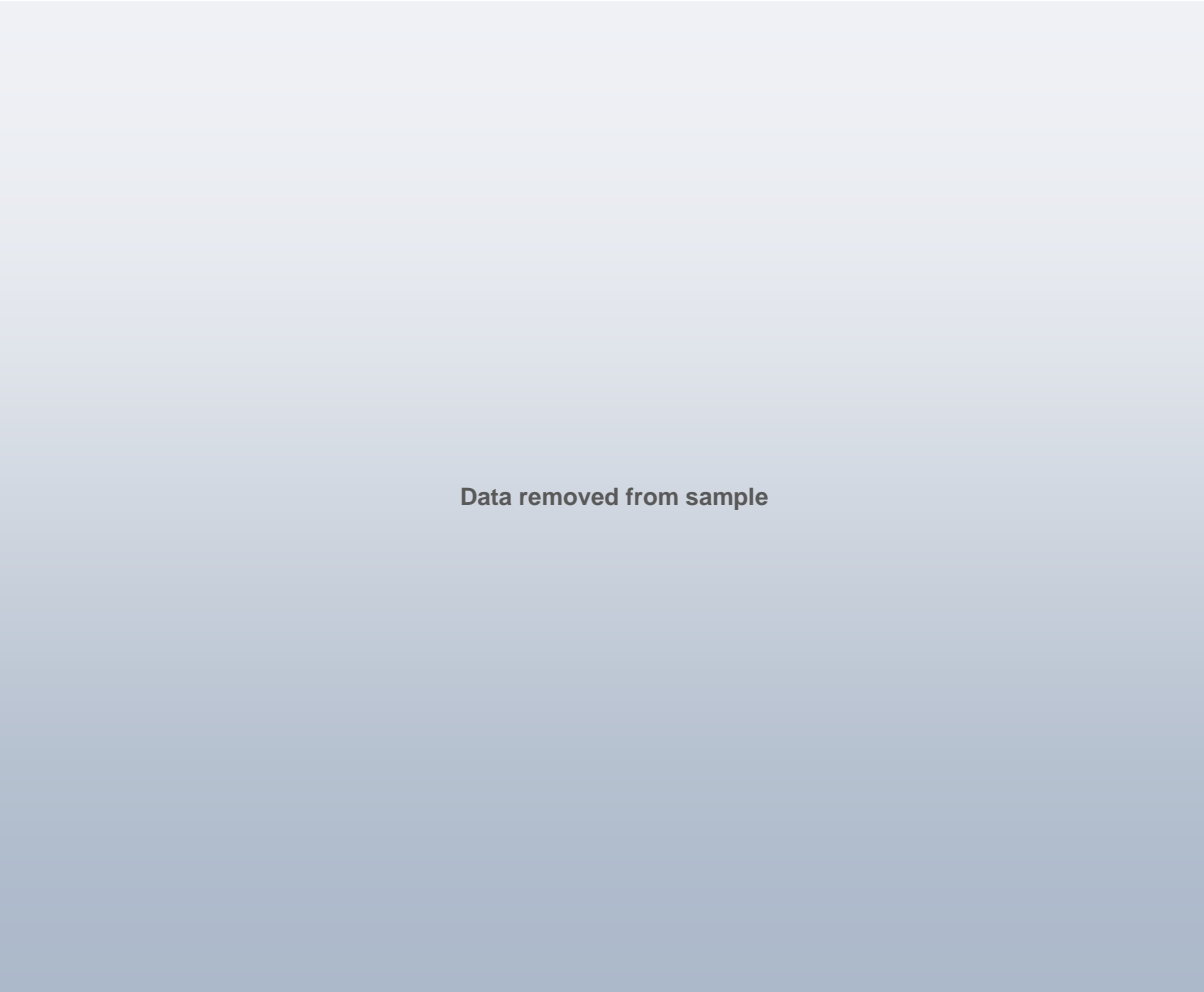
	2022/23	2018-23 CAGR	2018/23 Total
-- Men's Nightwear	Data removed from sample		
-- Men's Outerwear			
--- Men's Jeans			
---- Economy Men's Jeans			
---- Standard Men's Jeans			
---- Premium Men's Jeans			
---- Super Premium Men's Jeans			
--- Men's Outerwear (Excl Jeans)			
---- Men's Jackets and Coats			
---- Men's Jumpers			
---- Men's Shirts			
---- Men's Shorts and Trousers			
---- Men's Suits			
---- Men's Tops			
---- Other Men's Outerwear			
-- Men's Swimwear			
-- Men's Underwear			
- Menswear			

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

Table 5 NBO Company Shares of Menswear: % Value 2019-2023

% retail value rsp

Company	2019	2020	2021	2022	2023
Data removed from sample					

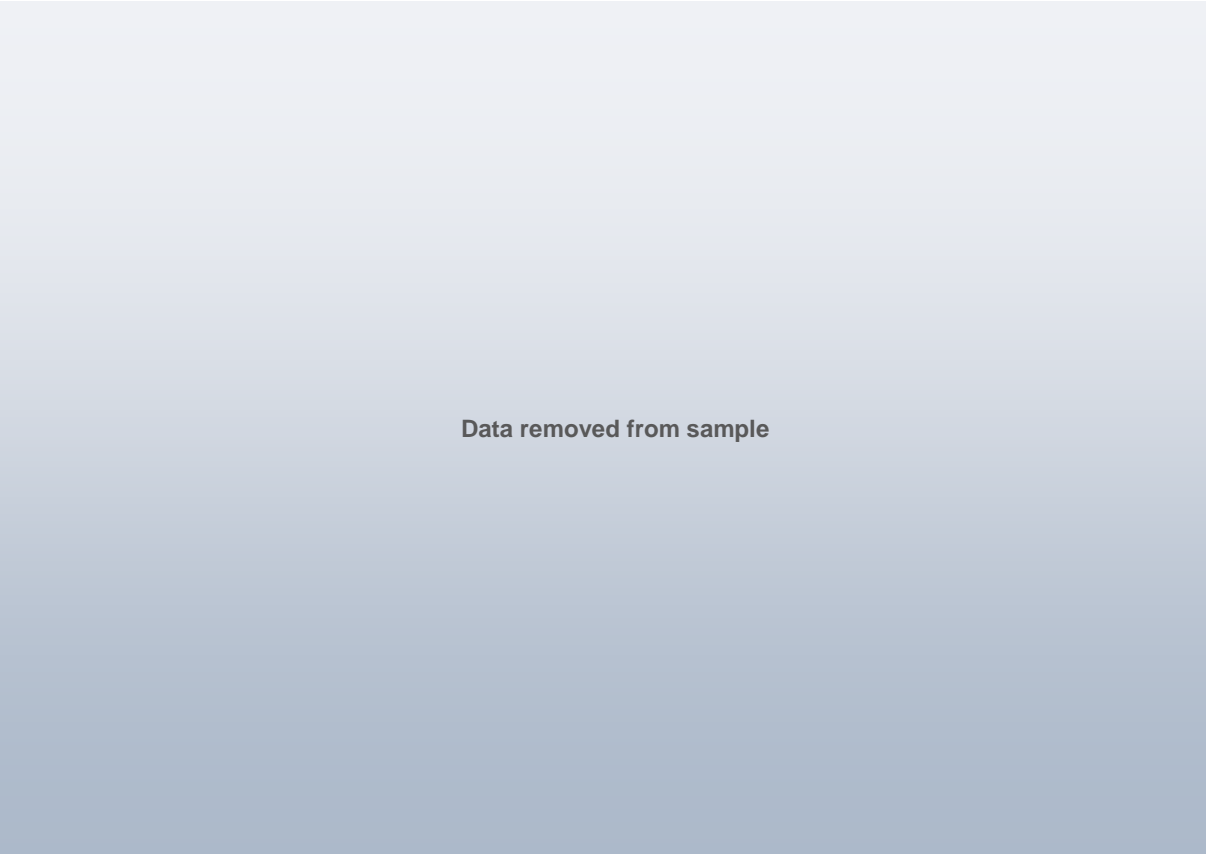


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Menswear: % Value 2020-2023

% retail value rsp Brand (GBO)	Company (NBO)	2020	2021	2022	2023
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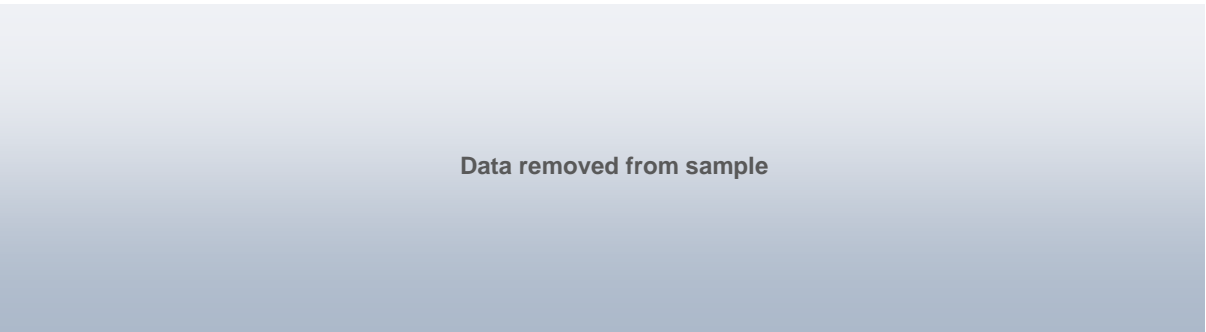
Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 NBO Company Shares of Men's Nightwear: % 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 8 LBN Brand Shares of Men's Nightwear: % 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 9 NBO Company Shares of Men's Outerwear: % Value 2019-2023

% retail value rsp Company	2019	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 10 LBN Brand Shares of Men’s Outerwear: % 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 11 NBO Company Shares of Men's Swimwear: % 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 12 LBN Brand Shares of Men's Swimwear: % 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 13 NBO Company Shares of Men’s Underwear: % 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 14 LBN Brand Shares of Men’s Underwear: % 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 Menswear by Category: Volume 2023-2028

'000 units	2023	2024	2025	2026	2027	2028
-- Men's Nightwear	Data removed from sample					
-- Men's Outerwear						
--- Men's Jeans						
---- Economy Men's Jeans						
---- Standard Men's Jeans						
---- Premium Men's Jeans						
---- Super Premium Men's Jeans						
--- Men's Outerwear (Excl Jeans)						
---- Men's Jackets and Coats						
---- Men's Jumpers						
---- Men's Shirts						
---- Men's Shorts and Trousers						
---- Men's Suits						
---- Men's Tops						
---- Other Men's Outerwear						
-- Men's Swimwear						
-- Men's Underwear						
- Menswear						

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

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

ZAR million	2023	2024	2025	2026	2027	2028
-- Men's Nightwear	Data removed from sample					
-- Men's Outerwear						
--- Men's Jeans						
---- Economy Men's Jeans						
---- Standard Men's Jeans						
---- Premium Men's Jeans						
---- Super Premium Men's Jeans						
--- Men's Outerwear (Excl Jeans)						
---- Men's Jackets and Coats						
---- Men's Jumpers						
---- Men's Shirts						
---- Men's Shorts and						

Trousers
 ---- Men's Suits
 ---- Men's Tops
 ---- Other Men's
 Outerwear
 -- Men's Swimwear
 -- Men's Underwear
 - Menswear

Data removed from sample

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

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

% volume growth

2023/24 2023-28 CAGR 2023/28 Total

-- Men's Nightwear
 -- Men's Outerwear
 --- Men's Jeans
 ---- Economy Men's Jeans
 ---- Standard Men's Jeans
 ---- Premium Men's Jeans
 ---- Super Premium Men's Jeans
 --- Men's Outerwear (Excl Jeans)
 ---- Men's Jackets and Coats
 ---- Men's Jumpers
 ---- Men's Shirts
 ---- Men's Shorts and Trousers
 ---- Men's Suits
 ---- Men's Tops
 ---- Other Men's Outerwear
 -- Men's Swimwear
 -- Men's Underwear
 - Menswear

Data removed from sample

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

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

% constant value growth

2023/2024 2023-28 CAGR 2023/28 Total

-- Men's Nightwear
 -- Men's Outerwear
 --- Men's Jeans
 ---- Economy Men's Jeans
 ---- Standard Men's Jeans
 ---- Premium Men's Jeans
 ---- Super Premium Men's Jeans
 --- Men's Outerwear (Excl Jeans)
 ---- Men's Jackets and Coats
 ---- Men's Jumpers
 ---- Men's Shirts
 ---- Men's Shorts and Trousers
 ---- Men's Suits
 ---- Men's Tops
 ---- Other Men's Outerwear

Data removed from sample

- Men's Swimwear
- Men's Underwear
- Menswear

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

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2023 key trends

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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 19 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 20 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 21 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 22 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 23 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 24 LBN Brand Shares of Apparel and Footwear: % Value 2020-2023

% retail value rsp
Brand (GBO)

Company (NBO)

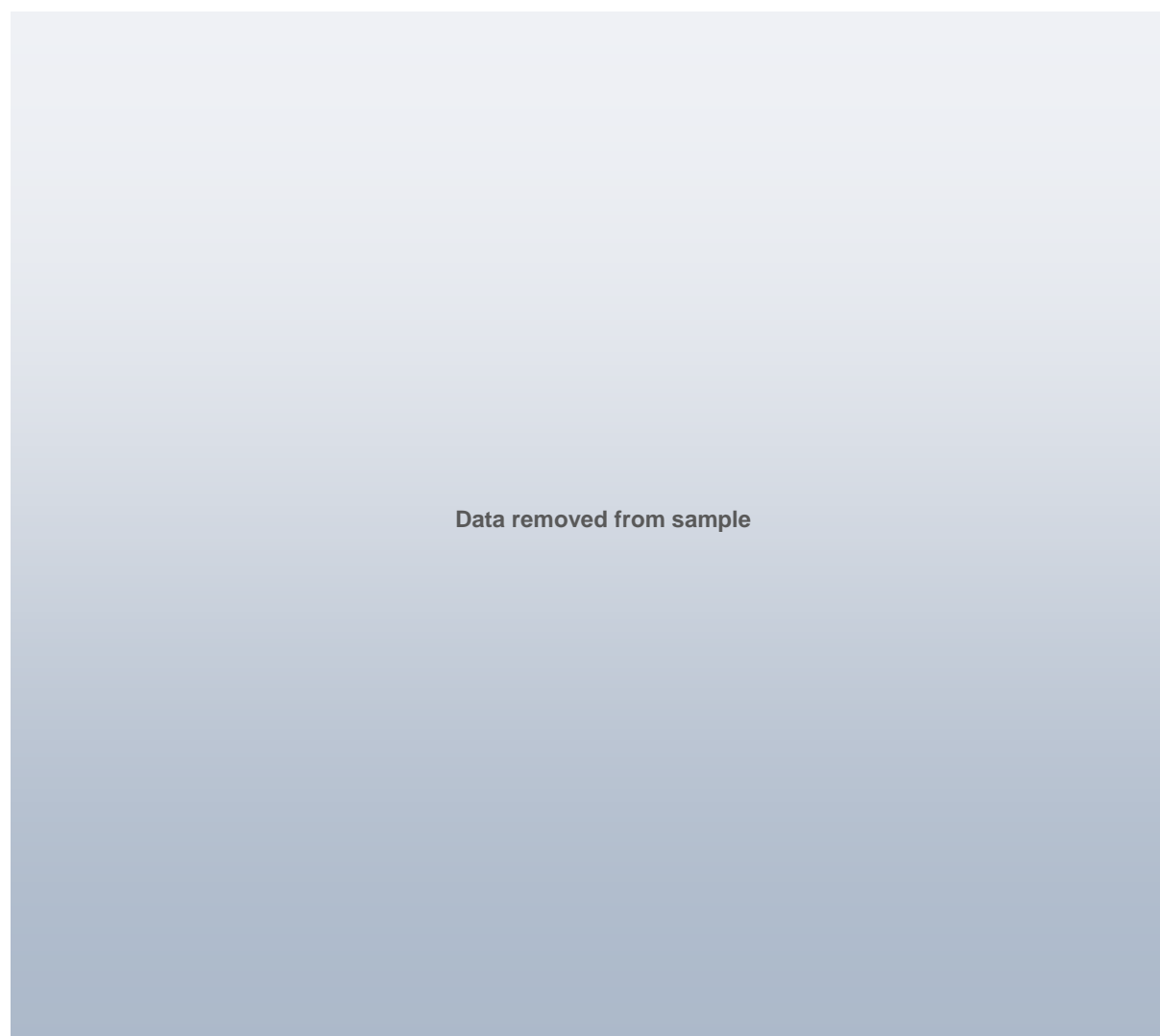
2020

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

% retail value rsp	2018	2019	2020	2021	2022	2023
Retail Channels	<p style="text-align: center;">Data removed from sample</p>					
- 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 26 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 27 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 28 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 29 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 30 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:

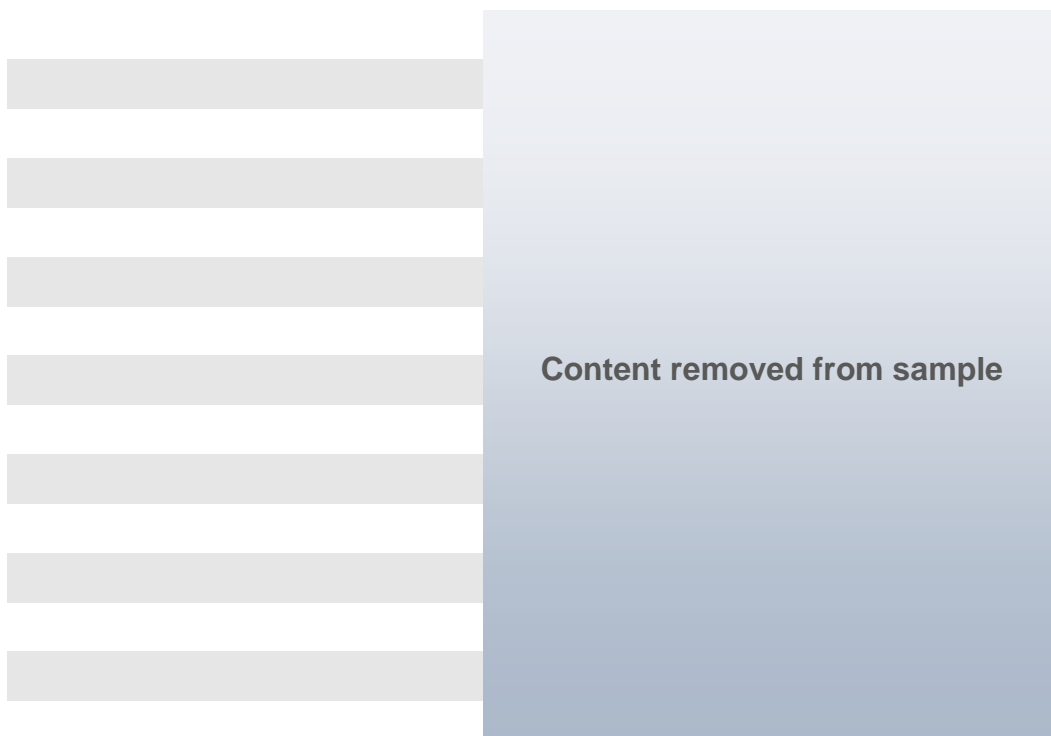
Summary 1 Research Sources

Official Sources

Trade Associations

Trade Press

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Source: Euromonitor International