

# Retail in South Africa

<https://marketpublishers.com/r/RDCD56B157ABEN.html>

Date: February 2024

Pages: 107

Price: US\$ 2,100.00 (Single User License)

ID: RDCD56B157ABEN

## Abstracts

In 2023, the retail landscape in South Africa remained challenged by the operating environment, translating into slow economic growth, which left unemployment at a relatively high level. As inflation remained above the South African Reserve Bank Target, households were further pressured by rising interest rates, which continued to impact disposable incomes and, subsequently, the ability to spend on discretionary goods and services. For retailers, the situation was exacerbated by persistent power...

Euromonitor International's Retail in South Africa report offers insight into key trends and developments driving the industry. The report examines all retail channels to provide sector insight. Channels include hypermarkets, supermarkets, discounters, convenience stores, mixed retailers, health and beauty retailers, clothing and footwear retailers, furniture and furnishing stores, DIY and hardware stores, durable goods retailers, leisure and personal goods retailers. There are profiles of leading retailers, with analysis of their performance and the challenges they face. There is also analysis of non-store retailing: vending; homeshopping; internet retailing; direct selling, as available.

**Product coverage:** Retail E-Commerce, Retail Offline.

**Data coverage:** market sizes (historic and forecasts), company shares, brand shares and distribution data.

## Why buy this report?

Get a detailed picture of the Retail market;

Pinpoint growth sectors and identify factors driving change;

Understand the competitive environment, the market's major players and leading brands;

Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

## Contents

### RETAIL IN SOUTH AFRICA

#### EXECUTIVE SUMMARY

Retail in 2023: The big picture

Further acquisitions and diversification emerge as leading retailers deploy greater resources

Competition intensifies online as the market normalises

What next for retail?

#### OPERATING ENVIRONMENT

Informal retail

Opening hours for physical retail

Summary 1 Standard Opening Hours by Channel Type 2023

Seasonality

Christmas

Back to School

#### MARKET DATA

Table 1 Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2018-2023

Table 2 Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2018-2023

Table 3 Sales in Retail Offline by Channel: Value 2018-2023

Table 4 Sales in Retail Offline by Channel: % Value Growth 2018-2023

Table 5 Retail Offline Outlets by Channel: Units 2018-2023

Table 6 Retail Offline Outlets by Channel: % Unit Growth 2018-2023

Table 7 Sales in Retail E-Commerce by Product: Value 2018-2023

Table 8 Sales in Retail E-Commerce by Product: % Value Growth 2018-2023

Table 9 Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 10 Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 11 Sales in Grocery Retailers by Channel: Value 2018-2023

Table 12 Sales in Grocery Retailers by Channel: % Value Growth 2018-2023

Table 13 Grocery Retailers Outlets by Channel: Units 2018-2023

Table 14 Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 15 Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 16 Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 17 Sales in Non-Grocery Retailers by Channel: Value 2018-2023

Table 18 Sales in Non-Grocery Retailers by Channel: % Value Growth 2018-2023

Table 19 Non-Grocery Retailers Outlets by Channel: Units 2018-2023

- Table 20 Non-Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023
- Table 21 Retail GBO Company Shares: % Value 2019-2023
- Table 22 Retail GBN Brand Shares: % Value 2020-2023
- Table 23 Retail Offline GBO Company Shares: % Value 2019-2023
- Table 24 Retail Offline GBN Brand Shares: % Value 2020-2023
- Table 25 Retail Offline LBN Brand Shares: Outlets 2020-2023
- Table 26 Retail E-Commerce GBO Company Shares: % Value 2019-2023
- Table 27 Retail E-Commerce GBN Brand Shares: % Value 2020-2023
- Table 28 Grocery Retailers GBO Company Shares: % Value 2019-2023
- Table 29 Grocery Retailers GBN Brand Shares: % Value 2020-2023
- Table 30 Grocery Retailers LBN Brand Shares: Outlets 2020-2023
- Table 31 Non-Grocery Retailers GBO Company Shares: % Value 2019-2023
- Table 32 Non-Grocery Retailers GBN Brand Shares: % Value 2020-2023
- Table 33 Non-Grocery Retailers LBN Brand Shares: Outlets 2020-2023
- Table 34 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2023-2028
- Table 35 Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2023-2028
- Table 36 Forecast Sales in Retail Offline by Channel: Value 2023-2028
- Table 37 Forecast Sales in Retail Offline by Channel: % Value Growth 2023-2028
- Table 38 Forecast Retail Offline Outlets by Channel: Units 2023-2028
- Table 39 Forecast Retail Offline Outlets by Channel: % Unit Growth 2023-2028
- Table 40 Forecast Sales in Retail E-Commerce by Product: Value 2023-2028
- Table 41 Forecast Sales in Retail E-Commerce by Product: % Value Growth 2023-2028
- Table 42 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 43 Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
- Table 44 Forecast Sales in Grocery Retailers by Channel: Value 2023-2028
- Table 45 Forecast Sales in Grocery Retailers by Channel: % Value Growth 2023-2028
- Table 46 Forecast Grocery Retailers Outlets by Channel: Units 2023-2028
- Table 47 Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028
- Table 48 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
- Table 49 Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
- Table 50 Forecast Sales in Non-Grocery Retailers by Channel: Value 2023-2028
- Table 51 Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2023-2028

Table 52 Forecast Non-Grocery Retailers Outlets by Channel: Units 2023-2028

Table 53 Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth  
2023-2028

DISCLAIMER

SOURCES

Summary 2 Research Sources

CONVENIENCE RETAILERS IN SOUTH AFRICA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Convenience stores continue to benefit from proximity

Reinventing the business model of forecourt retailers in South Africa

Shoprite retains lead of convenience stores as it expands its franchise network

PROSPECTS AND OPPORTUNITIES

Diversification will continue to boost sales of forecourt retailers

Phygital experience will emerge in higher-income areas

Franchise model will prevail in convenience stores

CHANNEL DATA

Table 54 Convenience Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 55 Convenience Retailers: Value Sales, Outlets and Selling Space: % Growth  
2018-2023

Table 56 Sales in Convenience Retailers by Channel: Value 2018-2023

Table 57 Sales in Convenience Retailers by Channel: % Value Growth 2018-2023

Table 58 Convenience Retailers GBO Company Shares: % Value 2019-2023

Table 59 Convenience Retailers GBN Brand Shares: % Value 2020-2023

Table 60 Convenience Retailers LBN Brand Shares: Outlets 2020-2023

Table 61 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space  
2023-2028

Table 62 Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space: %  
Growth 2023-2028

Table 63 Forecast Sales in Convenience Retailers by Channel: Value 2023-2028

Table 64 Forecast Sales in Convenience Retailers by Channel: % Value Growth  
2023-2028

DISCOUNTERS IN SOUTH AFRICA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Discounters continue to attract cash-strapped consumers in South Africa

Pick 'n' Pay Retailers accelerates rollout of Boxer stores

U-Save expands in rural areas as competition intensifies

PROSPECTS AND OPPORTUNITIES

Persisting income divide will continue supporting sales through discounters  
Brand share likely to remain consolidated among leading players  
Technology will gradually make its way to discounters

#### CHANNEL DATA

Table 65 Discounters: Value Sales, Outlets and Selling Space 2018-2023  
Table 66 Discounters: Value Sales, Outlets and Selling Space: % Growth 2018-2023  
Table 67 Discounters GBO Company Shares: % Value 2019-2023  
Table 68 Discounters GBN Brand Shares: % Value 2020-2023  
Table 69 Discounters LBN Brand Shares: Outlets 2020-2023  
Table 70 Discounters Forecasts: Value Sales, Outlets and Selling Space 2023-2028  
Table 71 Discounters Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

#### HYPERMARKETS IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Expansion of hypermarkets remains muted in 2023  
Digital innovation marked by value propositions  
Shoprite widens the gap with competitors

##### PROSPECTS AND OPPORTUNITIES

Steady increase in number of outlets as local economy recovers  
Digitalisation will offer further convenience to hypermarkets  
Strategic positioning to become an important competitive tool

#### CHANNEL DATA

Table 72 Hypermarkets: Value Sales, Outlets and Selling Space 2018-2023  
Table 73 Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023  
Table 74 Hypermarkets GBO Company Shares: % Value 2019-2023  
Table 75 Hypermarkets GBN Brand Shares: % Value 2020-2023  
Table 76 Hypermarkets LBN Brand Shares: Outlets 2020-2023  
Table 77 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028  
Table 78 Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

#### SUPERMARKETS IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Supermarket value growth driven by inflationary pressures  
Pick 'n' Pay Retailers struggles to find a balance  
Shoprite Holdings consolidates leadership as it expands across income groups

##### PROSPECTS AND OPPORTUNITIES

Supermarkets will benefit from further network expansion

Competition set to intensify as restructuring plans settle

Improvement in last mile delivery services to become a key differentiating tool

#### CHANNEL DATA

Table 79 Supermarkets: Value Sales, Outlets and Selling Space 2018-2023

Table 80 Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 81 Supermarkets GBO Company Shares: % Value 2019-2023

Table 82 Supermarkets GBN Brand Shares: % Value 2020-2023

Table 83 Supermarkets LBN Brand Shares: Outlets 2020-2023

Table 84 Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 85 Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

#### SMALL LOCAL GROCERS IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Small local grocers remain subject to high inflation

Increasing numbers of brands target small local grocers

Fintech continues to support the modernisation of the channel

##### PROSPECTS AND OPPORTUNITIES

Small local grocers will continue to expand as unemployment persists

The end of exclusive lease agreements will create room for small local grocers

Improving socioeconomic conditions will support channel's modernisation

#### CHANNEL DATA

Table 86 Small Local Grocers: Value Sales, Outlets and Selling Space 2018-2023

Table 87 Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 88 Small Local Grocers GBO Company Shares: % Value 2019-2023

Table 89 Small Local Grocers GBN Brand Shares: % Value 2020-2023

Table 90 Small Local Grocers LBN Brand Shares: Outlets 2020-2023

Table 91 Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 92 Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

#### APPAREL AND FOOTWEAR SPECIALISTS IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Growth for apparel and footwear specialists despite challenging operating environment

Competition intensifies as the channel becomes increasingly consolidated

Rise of Shein places pressure on local operators

##### PROSPECTS AND OPPORTUNITIES

Apparel and footwear sales will benefit from improvement in economic conditions

Competition set to further intensify in local market

Online consolidation will alleviate pressure from online marketplaces

#### CHANNEL DATA

Table 93 Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 94 Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 95 Apparel and Footwear Specialists GBO Company Shares: % Value 2019-2023

Table 96 Apparel and Footwear Specialists GBN Brand Shares: % Value 2020-2023

Table 97 Apparel and Footwear Specialists LBN Brand Shares: Outlets 2020-2023

Table 98 Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 99 Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

#### APPLIANCES AND ELECTRONICS SPECIALISTS IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Steady sales increase for electronics and appliances specialists despite difficult market conditions

Rising number of consumers and businesses embrace Buy Now Pay Later

Appliances and electronics specialists face intensifying competition from all fronts

##### PROSPECTS AND OPPORTUNITIES

Sales of electronics and appliances will benefit from better economic conditions

Sustainability will continue reshaping the channel's landscape

Diversified offerings will continue to provide a competitive edge

#### CHANNEL DATA

Table 100 Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 101 Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 102 Appliances and Electronics Specialists GBO Company Shares: % Value 2019-2023

Table 103 Appliances and Electronics Specialists GBN Brand Shares: % Value 2020-2023

Table 104 Appliances and Electronics Specialists LBN Brand Shares: Outlets 2020-2023

Table 105 Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028



Table 106 Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## HEALTH AND BEAUTY SPECIALISTS IN SOUTH AFRICA

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Health and beauty specialists benefit from revived routines

Clicks reinforces leadership as it expands its portfolio

Pharmacies welcome ruling on antiretroviral treatment initiatives

### PROSPECTS AND OPPORTUNITIES

Health and beauty specialists set to post further steady growth

Digitalisation will continue to gain traction

Brand share likely to remain consolidated amid concerns over new health system

### CHANNEL DATA

Table 107 Health and Beauty Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 108 Health and Beauty Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 109 Sales in Health and Beauty Specialists by Channel: Value 2018-2023

Table 110 Sales in Health and Beauty Specialists by Channel: % Value Growth 2018-2023

Table 111 Health and Beauty Specialists GBO Company Shares: % Value 2019-2023

Table 112 Health and Beauty Specialists GBN Brand Shares: % Value 2020-2023

Table 113 Health and Beauty Specialists LBN Brand Shares: Outlets 2020-2023

Table 114 Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 115 Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 116 Forecast Sales in Health and Beauty Specialists by Channel: Value 2023-2028

Table 117 Forecast Sales in Health and Beauty Specialists by Channel: % Value Growth 2023-2028

## HOME PRODUCTS SPECIALISTS IN SOUTH AFRICA

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rising interest rate impacts demand for home improvements

The Foschini Group continues to gain momentum in home products specialists

Woolworths taps into pet stores

### PROSPECTS AND OPPORTUNITIES

Home products specialists set to benefit from improving economy

Competition will continue to intensify in homewares and home furnishing stores  
Integrated business model to remain at the forefront of players' strategies

#### CHANNEL DATA

Table 118 Home Products Specialists: Value Sales, Outlets and Selling Space  
2018-2023

Table 119 Home Products Specialists: Value Sales, Outlets and Selling Space: %  
Growth 2018-2023

Table 120 Sales in Home Products Specialists by Channel: Value 2018-2023

Table 121 Sales in Home Products Specialists by Channel: % Value Growth 2018-2023

Table 122 Home Products Specialists GBO Company Shares: % Value 2019-2023

Table 123 Home Products Specialists GBN Brand Shares: % Value 2020-2023

Table 124 Home Products Specialists LBN Brand Shares: Outlets 2020-2023

Table 125 Home Products Specialists Forecasts: Value Sales, Outlets and Selling  
Space 2023-2028

Table 126 Home Products Specialists Forecasts: Value Sales, Outlets and Selling  
Space: % Growth 2023-2028

Table 127 Forecast Sales in Home Products Specialists by Channel: Value 2023-2028

Table 128 Forecast Sales in Home Products Specialists by Channel: % Value Growth  
2023-2028

#### GENERAL MERCHANDISE STORES IN SOUTH AFRICA

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Woolworths leads department stores despite intensified competition

Edgars resumes expansion after changing hands during the pandemic

The Crazy Store retains lead in variety stores

##### PROSPECTS AND OPPORTUNITIES

More department stores will embrace the "shoppertainment" trend

Variety stores will continue expanding in underserved areas

Return of Edgars could reshape competitive landscape

#### CHANNEL DATA

Table 129 General Merchandise Stores: Value Sales, Outlets and Selling Space  
2018-2023

Table 130 General Merchandise Stores: Value Sales, Outlets and Selling Space: %  
Growth 2018-2023

Table 131 Sales in General Merchandise Stores by Channel: Value 2018-2023

Table 132 Sales in General Merchandise Stores by Channel: % Value Growth  
2018-2023

Table 133 General Merchandise Stores GBO Company Shares: % Value 2019-2023

Table 134 General Merchandise Stores GBN Brand Shares: % Value 2020-2023

Table 135 General Merchandise Stores LBN Brand Shares: Outlets 2020-2023

Table 136 General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 137 General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 138 Forecast Sales in General Merchandise Stores by Channel: Value 2023-2028

Table 139 Forecast Sales in General Merchandise Stores by Channel: % Value Growth 2023-2028

## DIRECT SELLING IN SOUTH AFRICA

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Direct selling sales stabilise but environment remains challenging

Avon continues to expand business model in South Africa

Tupperware continues to lose ground as customer base shrinks

### PROSPECTS AND OPPORTUNITIES

Direct selling will likely benefit from improving market conditions

Omnichannel will continue to transform business models

Innovation will focus on sustainability

### CHANNEL DATA

Table 140 Direct Selling by Product: Value 2018-2023

Table 141 Direct Selling by Product: % Value Growth 2018-2023

Table 142 Direct Selling GBO Company Shares: % Value 2019-2023

Table 143 Direct Selling GBN Brand Shares: % Value 2020-2023

Table 144 Direct Selling Forecasts by Product: Value 2023-2028

Table 145 Direct Selling Forecasts by Product: % Value Growth 2023-2028

## VENDING IN SOUTH AFRICA

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Vending continues to recover from turbulent lockdown restrictions

Sales of tobacco products vending continue to decline

Niche vending machines continue to emerge

### PROSPECTS AND OPPORTUNITIES

Tobacco products likely to continue declining as new regulations are imposed

Contactless vending will continue to gain traction in South Africa

Innovation to focus on wellness and sustainable offerings

### CHANNEL DATA

Table 146 Vending by Product: Value 2018-2023

Table 147 Vending by Product: % Value Growth 2018-2023

Table 148 Vending GBO Company Shares: % Value 2019-2023

Table 149 Vending GBN Brand Shares: % Value 2020-2023

Table 150 Vending Forecasts by Product: Value 2023-2028

Table 151 Vending Forecasts by Product: % Value Growth 2023-2028

## RETAIL E-COMMERCE IN SOUTH AFRICA

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

E-commerce continues to grow in 2023 despite return to shopping centres

Takealot Online retains lead despite challenging environment

On-demand grocery delivery gains traction in affluent areas

### PROSPECTS AND OPPORTUNITIES

Improvements in financial inclusion will continue to drive e-commerce sales

More dark stores to emerge as Q-commerce becomes standard

Decision by Competition Tribunal could reshape marketplace

### CHANNEL DATA

Table 152 Retail E-Commerce by Channel: Value 2017-2022

Table 153 Retail E-Commerce by Channel: % Value Growth 2017-2022

Table 154 Retail E-Commerce by Product: Value 2017-2022

Table 155 Retail E-Commerce by Product: % Value Growth 2017-2022

Table 156 Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 157 Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 158 Forecast Retail E-Commerce by Channel: Value 2022-2027

Table 159 Forecast Retail E-Commerce by Channel: % Value Growth 2022-2027

Table 160 Forecast Retail E-Commerce by Product: Value 2022-2027

Table 161 Forecast Retail E-Commerce by Product: % Value Growth 2022-2027

## I would like to order

Product name: Retail in South Africa

Product link: <https://marketpublishers.com/r/RDCD56B157ABEN.html>

Price: US\$ 2,100.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/RDCD56B157ABEN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970