



**Euromonitor
International**

Apparel and Footwear in Indonesia

November 2024

Table of Contents

EXECUTIVE SUMMARY

Apparel and footwear in 2024: The big picture
2024 key trends
Competitive landscape
Retailing developments
What next for apparel and footwear?

MARKET DATA

- Table 1 - Sales of Apparel and Footwear by Category: Volume 2019-2024
- Table 2 - Sales of Apparel and Footwear by Category: Value 2019-2024
- Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2019-2024
- Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2019-2024
- Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2020-2024
- Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2021-2024
- Table 7 - Distribution of Apparel and Footwear by Format: % Value 2019-2024
- Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2024
- Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2024-2029
- Table 10 - Forecast Sales of Apparel and Footwear by Category: Value 2024-2029
- Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2024-2029
- Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

Fashion is having a greater impact on childrenswear, due to rise of social media
Paris 2024 Olympics sparks athleisure-inspired trends
Luxury brands expand into children’s fashion, while imported products attract lower-middle income groups

PROSPECTS AND OPPORTUNITIES

Childrenswear market in Indonesia is set for healthy growth with strong local brand presence
Local brands will tap into character-driven collections to engage Indonesian children
Imported childrenswear will continue to thrive, due to its affordability

CATEGORY DATA

- Table 13 - Sales of Childrenswear by Category: Volume 2019-2024
- Table 14 - Sales of Childrenswear by Category: Value 2019-2024
- Table 15 - Sales of Childrenswear by Category: % Volume Growth 2019-2024
- Table 16 - Sales of Childrenswear by Category: % Value Growth 2019-2024
- Table 17 - NBO Company Shares of Childrenswear: % Value 2020-2024
- Table 18 - LBN Brand Shares of Childrenswear: % Value 2021-2024
- Table 19 - Forecast Sales of Childrenswear by Category: Volume 2024-2029
- Table 20 - Forecast Sales of Childrenswear by Category: Value 2024-2029
- Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2024-2029
- Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2024-2029

Apparel Accessories in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- K-pop idols have growing influence on apparel accessories
- Hijabs cater to a variety of tastes and preferences
- Lacoste seeks to expand its reach through collaborations with Netflix and Golf House

PROSPECTS AND OPPORTUNITIES

- Rise of sport-apparel accessories
- Evolution of the hijab will continue to drive growth
- Stüssy and Levi's collaborate on limited-edition capsule collection

CATEGORY DATA

- Table 23 - Sales of Apparel Accessories by Category: Volume 2019-2024
- Table 24 - Sales of Apparel Accessories by Category: Value 2019-2024
- Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2019-2024
- Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2019-2024
- Table 27 - NBO Company Shares of Apparel Accessories: % Value 2020-2024
- Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2021-2024
- Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2024-2029
- Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2024-2029
- Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2024-2029
- Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2024-2029

Menswear in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Korean menswear brands make waves in Indonesia
- Ryusei leverages digital innovation to boost sales
- Sustainable fashion practices gain momentum among local brands

PROSPECTS AND OPPORTUNITIES

- Menswear will continue to recover, with focus on millennials, sustainability, and exclusivity
- Mass-market players will adapt to changing market dynamics with exclusive collaborations and loyalty programmes
- Rise of athletes as fashion influencers

CATEGORY DATA

- Table 33 - Sales of Menswear by Category: Volume 2019-2024
- Table 34 - Sales of Menswear by Category: Value 2019-2024
- Table 35 - Sales of Menswear by Category: % Volume Growth 2019-2024
- Table 36 - Sales of Menswear by Category: % Value Growth 2019-2024
- Table 37 - NBO Company Shares of Menswear: % Value 2020-2024
- Table 38 - LBN Brand Shares of Menswear: % Value 2021-2024
- Table 39 - NBO Company Shares of Men's Nightwear: % Value 2020-2024
- Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2021-2024
- Table 41 - NBO Company Shares of Men's Outerwear: % Value 2020-2024
- Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2021-2024
- Table 43 - NBO Company Shares of Men's Swimwear: % Value 2020-2024
- Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2021-2024
- Table 45 - NBO Company Shares of Men's Underwear: % Value 2020-2024

Table 46 - LBN Brand Shares of Men's Underwear: % Value 2021-2024

Table 47 - Forecast Sales of Menswear by Category: Volume 2024-2029

Table 48 - Forecast Sales of Menswear by Category: Value 2024-2029

Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2024-2029

Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2024-2029

Womenswear in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Womenswear in Indonesia set for healthy growth in 2024, driven by fusion of tradition and modernity

Local Indonesian brands embrace eco-friendly fashion in line with government sustainability initiatives

Artkea strengthens its presence with flagship store launch

PROSPECTS AND OPPORTUNITIES

Expansion of premium mall concept will boost sales of local and international luxury brands

Local brands to gain prominence as younger consumers embrace "Support Lokal" initiatives

Local fashion brands embrace sustainability in new collections

CATEGORY DATA

Table 51 - Sales of Womenswear by Category: Volume 2019-2024

Table 52 - Sales of Womenswear by Category: Value 2019-2024

Table 53 - Sales of Womenswear by Category: % Volume Growth 2019-2024

Table 54 - Sales of Womenswear by Category: % Value Growth 2019-2024

Table 55 - NBO Company Shares of Womenswear: % Value 2020-2024

Table 56 - LBN Brand Shares of Womenswear: % Value 2021-2024

Table 57 - NBO Company Shares of Women's Nightwear: % Value 2020-2024

Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2021-2024

Table 59 - NBO Company Shares of Women's Outerwear: % Value 2020-2024

Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2021-2024

Table 61 - NBO Company Shares of Women's Swimwear: % Value 2020-2024

Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2021-2024

Table 63 - NBO Company Shares of Women's Underwear: % Value 2020-2024

Table 64 - LBN Brand Shares of Women's Underwear: % Value 2021-2024

Table 65 - Forecast Sales of Womenswear by Category: Volume 2024-2029

Table 66 - Forecast Sales of Womenswear by Category: Value 2024-2029

Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2024-2029

Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2024-2029

Jeans in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Modest growth expected in 2024

Investment in planet-friendly denim by local and international brands

Uniqlo leads Indonesia's jeans market while Loro Piana sets new standards for luxury denim

PROSPECTS AND OPPORTUNITIES

Jeans market set for continued growth with Gen Z driving demand

Local brands, with their reputation for craftsmanship, will eye international stage

Levi's and McLaren Racing launch first collaborative collection

CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2019-2024

Table 70 - Sales of Jeans by Category: Value 2019-2024

Table 71 - Sales of Jeans by Category: % Volume Growth 2019-2024

Table 72 - Sales of Jeans by Category: % Value Growth 2019-2024

Table 73 - Sales of Men's Jeans by Category: Volume 2019-2024

Table 74 - Sales of Men's Jeans by Category: Value 2019-2024

Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2019-2024

Table 76 - Sales of Men's Jeans by Category: % Value Growth 2019-2024

Table 77 - Sales of Women's Jeans by Category: Volume 2019-2024

Table 78 - Sales of Women's Jeans by Category: Value 2019-2024

Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2019-2024

Table 80 - Sales of Women's Jeans by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Jeans: % Value 2020-2024

Table 82 - LBN Brand Shares of Jeans: % Value 2021-2024

Table 83 - Forecast Sales of Jeans by Category: Volume 2024-2029

Table 84 - Forecast Sales of Jeans by Category: Value 2024-2029

Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2024-2029

Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2024-2029

Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2024-2029

Table 88 - Forecast Sales of Men's Jeans by Category: Value 2024-2029

Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2024-2029

Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2024-2029

Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2024-2029

Table 92 - Forecast Sales of Women's Jeans by Category: Value 2024-2029

Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2024-2029

Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2024-2029

Hosiery in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Continued growth in 2024, thanks to athleisure trend
- Pilates gains popularity, boosting demand for specialised apparel
- Luxury brands may face growing competition from new premium entrants

PROSPECTS AND OPPORTUNITIES

- Continued growth of sneakers could boost sales of non-sheer hosiery
- Growing interest in active lifestyles will fuel demand for sports hosiery
- Local sock manufacturers prioritise quality, with CV TSM earning SNI certification for quality

CATEGORY DATA

Table 95 - Sales of Hosiery by Category: Volume 2019-2024

Table 96 - Sales of Hosiery by Category: Value 2019-2024

Table 97 - Sales of Hosiery by Category: % Volume Growth 2019-2024

Table 98 - Sales of Hosiery by Category: % Value Growth 2019-2024

Table 99 - NBO Company Shares of Hosiery: % Value 2020-2024

Table 100 - LBN Brand Shares of Hosiery: % Value 2021-2024

Table 101 - Forecast Sales of Hosiery by Category: Volume 2024-2029

Table 102 - Forecast Sales of Hosiery by Category: Value 2024-2029

Table 103 - Forecast Sales of Hosiery by Category: % Volume Growth 2024-2029

Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2024-2029

Footwear in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Rise of sneakers as a fashion statement
- Technology-driven shopping experiences transform the footwear market
- Activewear collaborations redefine boundaries of fashion and performance

PROSPECTS AND OPPORTUNITIES

- Casual styles will drive growth, with suede making a comeback
- Indonesian footwear industry faces ongoing challenges
- Salomon Indonesia and Mote Mote collaborate on customisable footwear collection

CATEGORY DATA

- Table 105 - Sales of Footwear by Category: Volume 2019-2024
- Table 106 - Sales of Footwear by Category: Value 2019-2024
- Table 107 - Sales of Footwear by Category: % Volume Growth 2019-2024
- Table 108 - Sales of Footwear by Category: % Value Growth 2019-2024
- Table 109 - NBO Company Shares of Footwear: % Value 2020-2024
- Table 110 - LBN Brand Shares of Footwear: % Value 2021-2024
- Table 111 - Distribution of Footwear by Format: % Value 2019-2024
- Table 112 - Forecast Sales of Footwear by Category: Volume 2024-2029
- Table 113 - Forecast Sales of Footwear by Category: Value 2024-2029
- Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2024-2029
- Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2024-2029

Sportswear in Indonesia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Sportswear sees continued growth fuelled by health and wellness trends
- Local sportswear brands in Indonesia gain momentum
- Adidas taps into local culture with “Island Series” to boost sales

PROSPECTS AND OPPORTUNITIES

- Sportswear will maintain positive growth, driven by active lifestyles
- Indonesia targets sports tourism with major events and activities
- Indonesian sportswear industry eyes global expansion

CATEGORY DATA

- Table 116 - Sales of Sportswear by Category: Value 2019-2024
- Table 117 - Sales of Sportswear by Category: % Value Growth 2019-2024
- Table 118 - NBO Company Shares of Sportswear: % Value 2020-2024
- Table 119 - LBN Brand Shares of Sportswear: % Value 2021-2024
- Table 120 - Distribution of Sportswear by Format: % Value 2019-2024
- Table 121 - Forecast Sales of Sportswear by Category: Value 2024-2029
- Table 122 - Forecast Sales of Sportswear by Category: % Value Growth 2024-2029

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-indonesia/report.