



**Euromonitor
International**

Apparel Accessories in South Africa

February 2026

Table of Contents

Apparel Accessories in South Africa - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Apparel accessories growth challenged by market polarisation and rising challenger brands

Chart 1 - Key Trends 2025

INDUSTRY PERFORMANCE

Apparel accessories experiences slow growth below regional average

Online-only players drive market polarisation and challenge incumbent brands

Chart 2 - Local Players Bearing the Brunt of the Rise of Shein and Temu

WHAT'S NEXT?

Growth to be slow as consumers remain price-sensitive, seeking cheap alternatives

COMPETITIVE LANDSCAPE

Pepkor Holdings Ltd maintains lead, despite growth of Shein

Brands need to adapt and strategise as resale options become increasingly popular

Chart 3 - Yaga Offers More Options for Pre-Loved Fashion Accessories

CHANNELS

Apparel specialists lead with strong omnichannel presence, e-commerce lags behind

COUNTRY REPORTS DISCLAIMER

Apparel and Footwear in South Africa - Industry Overview

EXECUTIVE SUMMARY

Affordable products attract many but athleisure and aspirational positioning also appeals

KEY DATA FINDINGS

Chart 4 - Key Trends 2025

INDUSTRY PERFORMANCE

Apparel and footwear sales supported by market polarisation and shifting consumer preferences

Market polarisation is a key driver in market growth and development

Chart 5 - Woolworths Offers Regular Price Promotions and Bundle Offers Throughout the Year

Resale platforms normalise second-hand clothing sales

Chart 6 - Resale Platforms Such as Yaga Normalise Resale

Shein remains a competitive challenger to local retailers, despite tax reforms

Chart 7 - Local Tax Reforms Expected to Level the Playing Field for Local Players

WHAT'S NEXT?

Athleisure, affordability, and aspirational purchases to continue driving spending

Normalisation of resale and sustainability to force companies to re-strategise

Chart 8 - Analyst Insight

COMPETITIVE LANDSCAPE

Local brands maintain lead, adapting to changing consumer preferences and tax regulations

Competitive nature of emerging brands to increase strategic positioning of local players

CHANNELS

Retail offline continues to dominate sales, albeit with a strong omnichannel presence

ECONOMIC CONTEXT

Chart 9 - Real GDP Growth and Inflation 2020-2030

Chart 10 - PEST Analysis in South Africa 2025

CONSUMER CONTEXT

Chart 11 - Key Insights on Consumers in South Africa 2025

Chart 12 - Consumer Landscape in South Africa 2025

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - 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/apparel-accessories-in-south-africa/report.