Summary

“The Future of Retailing in South Africa to 2018” published by Conlumino, provides a detailed analysis of both the historic and forecast market data of retail sales of different product segments across key channels in South Africa. In addition, it provides an overview of changing consumer and retail trends, the influence of various economic variables on the retail industry, innovations in retail, and an analysis of vital developments in major retail channels.

It provides detailed quantitative analysis of past and future trends, crucially providing retail sales data not just by channel and by product, but showing product sales through different channels. This allows marketers interested in retailing to determine how to account for the development of retail trade overall and to know which channels are showing growth for which products in the coming years.

Data sets are provided for 2008 through to 2018, with actuals being provided for 2013. All initial market sizing and analysis is conducted in local currency in order to ensure local trends are reflected in the data before conversion into other currencies.

Key Findings

- Post global recession, the country suffers with high unemployment and declining GDP growth
- Consumers tend to show greater affinity towards private labels during tough economic times
- Foreign fashion retailers continue to enter the growing South African clothing market
- Online retailing to emerge as the strongest retailing channel in the future, largely boosted by m-commerce
- Food and grocery to remain the largest and fastest-growing category

Reasons to Buy

- The report provides a comprehensive overview of the South African retail market for companies already operating in, and those wishing to enter South Africa
- Understand which channels and products will be the major winners and losers over the coming years and plan accordingly, with a comprehensive coverage of 26 products, across 12 product sectors that include: Clothing, Footwear, Books, News and Stationery, Electrical and Electronics, Food and Grocery, Personal Care, Furniture and Floor Coverings, Home and Garden Products, Music, Video and Entertainment Software, Sports and Leisure Equipment, Sports and Leisure Equipment, Luggage and Leather Goods
Detailed channel coverage is provided, covering 26 products, across four channel groups that include: General Retailers, Specialist Retailers, Value Retailers, and Online Retailers.

Benefit from a detailed analysis of vital economic and population trends, key consumer and technology trends influencing the retail market to underpin your planning.

Monitor the competitive landscape with the analysis of key trends which are shaping the competitive landscape of major retail channels.
1. Industry Analysis

1.1 The South African Retail Scenario

The South African economy is the largest economy in Africa; it has the most established retail market and the highest consumer spending in Africa. Despite volatile economic conditions, retail sales continue to grow driven by low inflation and low interest rates. Retail sales in South Africa witnessed a drastic decline in 2009, as the country was directly impacted by recession and financial crisis in Europe, the chief export destination of South Africa.

Of the South African population, xx% now lives in cities, which have fueled a growing middle class. In addition to real growth in retail trade sales, the changing purchasing patterns of consumers affected the market shares of retailer outlets. In South Africa, there is an increased demand for private label brands as consumers see these products are providing good value during economic difficulties. E-commerce is picking up as the online shopping sector continues to experience growth and is expected to grow due to the competition in internet service providers.

| Table 1: South Africa Total Retail Sales, ZAR billion, 2008–2018 |
|---------------------------------|------------------|
| Total Retail Sales              | Value (ZAR billion) |
| 2008                            | xxx.x            |
| 2013                            | xxx.x            |
| 2018                            | xxx.x            |
| CAGR 2013 – 2018                | x.xx%            |

Source: Conlumino © Conlumino
Figure 1: Overall retail sales in South Africa continue to grow despite the economic slowdown

However, the South African economy, though the largest in Africa, is currently hindered by several difficulties, including a particularly high unemployment rate of xx.x% as well as high poverty levels and labor strikes in the mining industry.

The South African government is striving towards its program of growing the economy and creating jobs. Proposals were made by the Treasury to scrap the value added tax (VAT) on goods and services bought by farmers for production. The bill also contains a proposal for a tax-free savings account in the 2014 budget, aimed at stimulating household savings.
2. Retail Trends and Innovations

2.1 Retailer Innovations

2.1.1 Biometric fingerprint authentication technology to enhance the future of the online purchasing process

Biometric fingerprint authentication technology, which is originally being used for device security, could ultimately make its way into e-commerce. The touch of a finger can now be used to replace the multiple alphabetical, numerical, and symbol logins and passwords, and credit card details to make online purchases.

According to Simon Leps, CEO of Frontier Digital Works, biometric fingerprint authentication technology has already found a place in laptops, external hard-drives and electronic wallets, and, going forward, it will be used in the e-commerce environment as a quick means to make online payments. This technology has high probability to be a standard augmentation for South Africa’s online retail platforms point of sale process.

Mobile payments, purchasing merchandise offline, and signing into online banking could all make use of biometric fingerprint authentication technology rather than pin codes and credit cards. Despite some early concerns with the technology, it’s more about making the online payments much simpler, easier, and effortless and secure for the user in order to boost e-commerce growth and sales.

Figure 2: Biometric fingerprint technology will find place in ecommerce platforms

Source: Company Website © Conlumino

This chapter considers South Africa's apparel, accessories, luggage and leather goods category group. Data is presented by breaking down the group by the categories it is made of, and the channels the category group is sold through.

3.1 Apparel, Accessories, Luggage and Leather Goods Category Overview

3.1.1 Apparel, Accessories, Luggage and Leather Goods by Channel

The apparel, accessories, luggage and leather goods product category, contributed x.xx% towards total retail sales, in 2013, registering retail sales of ZARxxx, xxx.x million. The category group is expected to grow at a pace of x.xx% during the forecast period, and register retail sales of ZARxxx, xxx.x million in 2018.

Specialist retailers formed the dominant sales channel, with retail revenues of ZARxxx, xxx.x million selling xx.x% of the product category in 2013.

Figure 3: South Africa Apparel, Accessories, Luggage and Leather Goods Retail Sales and Forecast (ZAR mn), by Channel Group, 2008–2018

![Bar chart showing retail sales by channel group from 2008 to 2018.](chart)

Source: Conlumino © Conlumino
Figure 4: South Africa Apparel, Accessories, Luggage and Leather Goods Retail Market Dynamics, by Channel Group, 2008–2018

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Source: Conlumino © Conlumino
### Table 3: South Africa Apparel, Accessories, Luggage and Leather Goods Retail Sales Forecast (ZAR mn), by Channel Group, 2013–2018

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Source: Conlumino

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### Table 4: South Africa Apparel, Accessories, Luggage and Leather Goods Retail Segmentation (% value), by Channel Group, 2008–2018

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Source: Conlumino

© Conlumino
Summary Methodology

Overview

All data in this series of retail reports from Conlumino is rigorously sourced using a comprehensive, standardized methodology. This methodology ensures that all data is thoroughly researched and cross–checked against a number of sources and validation processes. At the core of this methodology is a triangulated market sizing approach, which ensures that results from different sources and approaches, including Conlumino’s own industry surveys, are compared and a final consensus number between these inputs is derived. In addition, standardized processes and quality controls across the entire data collection, analysis and publication process ensure compliance and cross–checking of the data occurs at each stage of the methodology.

The triangulated market sizing method

The triangulation method ensures that the results from three distinct phases of the research are brought together and cross–compared before finalized market numbers are derived:

1. **Existing internal resources:** as retail data is compiled using a rolling annual program of industry research, the first stage of producing the data is to review the existing internal information, both from the last major data release, as well as that which has been collected on an ongoing basis throughout the year. This includes inputs about market as well as individual retailer performance. These sources are then reviewed and incorporated into data collection processes and databases before the second intensive phase of desk research.

2. **Extensive desk research:** this phase of the methodology incorporates the main phase of secondary research. This research is initially conducted across a wealth of information sources, as listed below. In addition, the results of any relevant surveys from other Conlumino projects are also fed into data collection sheets. Online industry surveys can include industry opinion surveys of retailers’ — and their suppliers’ — sentiment and consumer surveys of purchasing and retail behavior. Secondary sources include, but are not limited to, the following:
   
   a. Industry surveys
   b. Industry and trade association research
   c. Trade portals
   d. Company filings and analyst presentations
   e. Broker and investment analyst reports
   f. International organizations
   g. Government statistics
   h. Retail media
   i. National Press, including both business and consumer titles

3. **Market modeling:** the next stage in the process is to feed the results of the above into market models, which also include drive–based forecasting tools — which analyze drivers such as disposable income, product uptake, macro–economic drivers and market momentum — in order to fill in any gaps in the data and update forecast numbers. At this stage, the market models also look to update channel distribution data sets. For example, information found at the research and trend monitoring stage on online retail sales would directly affect the channel distribution models.
4. **Data finalization:** the final stage of the process is the true triangulation of all the previous inputs. At this stage data is created using the inputs to hand in a bottom–up fashion, starting with the inputs from each of the previous three stages of the process for each data point to be published. This is done for all the product, channel and country combinations covered in the data. At this stage, therefore, the project analysts are constantly evaluating and deciding upon the relative merits of each of the inputs from the research processes. Once a triangulated set of data has been finalized, these outputs are then thoroughly cross–checked using a series of top–down checks which review the data against a series of reference benchmarking, including known overall retail sizes, growth trends and per–capita spending rates.

![Figure 5: The Triangulated Market Sizing Methodology](source: Conlumino)
Industry surveys in the creation of retail market data

Stage 2 of the above process includes using the outputs of Conlumino’s surveys of consumers’ packaged goods consumption and industry opinion. Every year Conlumino completes a large scale survey, with over 120,000 responses, covering CPG purchasing and consumption habits in 10 core retail markets around the globe. This major study, cross-referenced against the primary telephone research of product market sizes by country, provides outputs against which relevant retail market data, focusing on the grocery channel and core products in this channel are assessed. It should be noted that overall, this feeds research into 3 of the 25 product categories covered. In addition, any other suitable surveys conducted by Conlumino which also provide information on retail markets are mined for information to be put into the data finalization process.

Quality control and standardized processes

Crucial to the function of the above method is the adoption of strict definitions for all products and channels, and adherence to a standardized process at each and every stage in the methodology. By following this approach all data is made cross-comparable across countries to ensure that analysis adds to the understanding of market dynamics and trends.

The key elements of this approach are:

- **Strict channel definitions**: the definition of each channel is the same in every country;
- **Strict product definitions**: the definition of each product is the same in every country;
- **Standardized processes**:
  - **Data capture** – all data received as part of the research is captured in standardized files and in a standard format. Any workings that analysts carry out on inputs, for example to correct for misalignment in category coverage, are also covered in these sheets
  - **Data creation** – all modeling and forecasting approaches are standardized in order to ensure consistency
  - **Finalization and verification** – systematic methods and approaches are used to finalize data points
- **Country by country research structure**: all research is conducted country by country in order to ensure that market data reflect local market trends and contexts
- **Data checks during “bottom-up” creation**: during the data creation and finalization stage analysts refer back to initial sources and inputs in order to ensure accuracy in the data
- **Top down data audits and cross-checks**: a large series of cross-checks across all the different dimensions of the final data sets are run in order to identify any outliers or trends that do not fit with Conlumino’s market understanding, as well as to conduct specific analyses against set proofing criteria, such as abnormal growth rate changes, verifying data at both the overall and detailed level against research inputs and checking per capita spends against other analysis of consumers’ spending in a country
- **Hierarchical review processes**: finally, all of the above processes are subject to a hierarchical review process which ensures that not only the core analysts within a team look at the data, but that at each stage data is passed through several management layers in order that queries and data review and sign-off are completed before any final data can be published
Related Reports

Retailing in Spain – Market Summary & Forecasts

Clothing & Footwear Retailing in Spain – Market Summary & Forecasts

Food and Grocery Retailing in Spain – Market Summary & Forecasts

The Future of Retailing in Spain to 2018 – Databook

The Future of Retailing in Italy to 2018
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