

Apparel and Footwear in Egypt

November 2023

Table of Contents

Apparel and Footwear in Egypt

EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for apparel and footwear?

MARKET DATA

- Table 1 Sales of Apparel and Footwear by Category: Volume 2018-2023
- Table 2 Sales of Apparel and Footwear by Category: Value 2018-2023
- Table 3 Sales of Apparel and Footwear by Category: % Volume Growth 2018-2023
- Table 4 Sales of Apparel and Footwear by Category: % Value Growth 2018-2023
- Table 5 NBO Company Shares of Apparel and Footwear: % Value 2019-2023
- Table 6 LBN Brand Shares of Apparel and Footwear: % Value 2020-2023
- Table 7 Distribution of Apparel and Footwear by Format: % Value 2018-2023
- Table 8 Distribution of Apparel and Footwear by Format and Category: % Value 2023
- Table 9 Forecast Sales of Apparel and Footwear by Category: Volume 2023-2028
- Table 10 Forecast Sales of Apparel and Footwear by Category: Value 2023-2028
- Table 11 Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028
- Table 12 Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Childrenswear in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Childrenswear faces the challenge of rising prices

Growing preference for second-hand clothing

Financial instalment plans offer consumers support

PROSPECTS AND OPPORTUNITIES

Moderate growth over the forecast period

Promotional events and bulk buying are key to consumers' purchasing patterns

High cost of inputs to put further pressure on prices

CATEGORY DATA

Table 13 - Sales of Childrenswear by Category: Volume 2018-2023

Table 14 - Sales of Childrenswear by Category: Value 2018-2023

Table 15 - Sales of Childrenswear by Category: % Volume Growth 2018-2023

Table 16 - Sales of Childrenswear by Category: % Value Growth 2018-2023

Table 17 - NBO Company Shares of Childrenswear: % Value 2019-2023

Table 18 - LBN Brand Shares of Childrenswear: % Value 2020-2023

Table 19 - Forecast Sales of Childrenswear by Category: Volume 2023-2028

Table 20 - Forecast Sales of Childrenswear by Category: Value 2023-2028

Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2023-2028

Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2023-2028

Apparel Accessories in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for apparel accessories declines in 2023 Consumers shift towards affordable local brands

Businesses under threat from difficult trading conditions

PROSPECTS AND OPPORTUNITIES

Slow recovery for apparel accessories in upcoming period

Apparel accessories well suited to online space

Belts and scarves to be the strongest subcategory

CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2018-2023

Table 24 - Sales of Apparel Accessories by Category: Value 2018-2023

Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2018-2023

Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2018-2023

Table 27 - NBO Company Shares of Apparel Accessories: % Value 2019-2023

Table 28 - LBN Brand Shares of Apparel Accessories: % Value 2020-2023

Table 29 - Forecast Sales of Apparel Accessories by Category: Volume 2023-2028

Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2023-2028

Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028

Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2023-2028

Menswear in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Menswear purchases decline amid escalating prices

Affordability is key as men switch to economy jeans

International brands keep prices high to protect profit margins

PROSPECTS AND OPPORTUNITIES

Moderate growth expected as the economy recovers

Foreign currency shortages will challenge production

Local player Tema Retail EG likely to assert its lead in menswear

CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2018-2023

Table 34 - Sales of Menswear by Category: Value 2018-2023

Table 35 - Sales of Menswear by Category: % Volume Growth 2018-2023

Table 36 - Sales of Menswear by Category: % Value Growth 2018-2023

Table 37 - NBO Company Shares of Menswear: % Value 2019-2023

Table 38 - LBN Brand Shares of Menswear: % Value 2020-2023

Table 39 - NBO Company Shares of Men's Nightwear: % Value 2019-2023

Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2020-2023

Table 41 - NBO Company Shares of Men's Outerwear: % Value 2019-2023

Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2020-2023

Table 43 - NBO Company Shares of Men's Swimwear: % Value 2019-2023

Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2020-2023

Table 45 - NBO Company Shares of Men's Underwear: % Value 2019-2023

- Table 46 LBN Brand Shares of Men's Underwear: % Value 2020-2023
- Table 47 Forecast Sales of Menswear by Category: Volume 2023-2028
- Table 48 Forecast Sales of Menswear by Category: Value 2023-2028
- Table 49 Forecast Sales of Menswear by Category: % Volume Growth 2023-2028
- Table 50 Forecast Sales of Menswear by Category: % Value Growth 2023-2028

Womenswear in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Soaring prices reduce demand for womenswear Consumers head to outlets amid cost of living crisis Local clothing brands gain popularity

PROSPECTS AND OPPORTUNITIES

Economic uncertainty to limit further investment Retail prices expected to stabilise in the short term Al Kassm Group to retain its lead in womenswear

CATEGORY DATA

- Table 51 Sales of Womenswear by Category: Volume 2018-2023
- Table 52 Sales of Womenswear by Category: Value 2018-2023
- Table 53 Sales of Womenswear by Category: % Volume Growth 2018-2023
- Table 54 Sales of Womenswear by Category: % Value Growth 2018-2023
- Table 55 NBO Company Shares of Womenswear: % Value 2019-2023
- Table 56 LBN Brand Shares of Womenswear: % Value 2020-2023
- Table 57 NBO Company Shares of Women's Nightwear: % Value 2019-2023
- Table 58 LBN Brand Shares of Women's Nightwear: % Value 2020-2023
- Table 59 NBO Company Shares of Women's Outerwear: % Value 2019-2023
- Table 60 LBN Brand Shares of Women's Outerwear: % Value 2020-2023
- Table 61 NBO Company Shares of Women's Swimwear: % Value 2019-2023
- Table 62 LBN Brand Shares of Women's Swimwear: % Value 2020-2023
- Table 63 NBO Company Shares of Women's Underwear: % Value 2019-2023
- Table 64 LBN Brand Shares of Women's Underwear: % Value 2020-2023
- Table 65 Forecast Sales of Womenswear by Category: Volume 2023-2028
- Table 66 Forecast Sales of Womenswear by Category: Value 2023-2028
- Table 67 Forecast Sales of Womenswear by Category: % Volume Growth 2023-2028
- Table 68 Forecast Sales of Womenswear by Category: % Value Growth 2023-2028

Jeans in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Jeans category witnesses slight decline in volume sales Affordable jeans support overall category performance Supply of imported super premium jeans curtailed

PROSPECTS AND OPPORTUNITIES

Jeans is expected to witness robust growth
Egyptian government to support local producers
Athleisure trend is a potential threat to growth

CATEGORY DATA

- Table 69 Sales of Jeans by Category: Volume 2018-2023
- Table 70 Sales of Jeans by Category: Value 2018-2023
- Table 71 Sales of Jeans by Category: % Volume Growth 2018-2023
- Table 72 Sales of Jeans by Category: % Value Growth 2018-2023
- Table 73 Sales of Men's Jeans by Category: Volume 2018-2023
- Table 74 Sales of Men's Jeans by Category: Value 2018-2023
- Table 75 Sales of Men's Jeans by Category: % Volume Growth 2018-2023
- Table 76 Sales of Men's Jeans by Category: % Value Growth 2018-2023
- Table 77 Sales of Women's Jeans by Category: Volume 2018-2023
- Table 78 Sales of Women's Jeans by Category: Value 2018-2023
- Table 79 Sales of Women's Jeans by Category: % Volume Growth 2018-2023
- Table 80 Sales of Women's Jeans by Category: % Value Growth 2018-2023
- Table 81 NBO Company Shares of Jeans: % Value 2019-2023
- Table 82 LBN Brand Shares of Jeans: % Value 2020-2023
- Table 83 Forecast Sales of Jeans by Category: Volume 2023-2028
- Table 84 Forecast Sales of Jeans by Category: Value 2023-2028
- Table 85 Forecast Sales of Jeans by Category: % Volume Growth 2023-2028
- Table 86 Forecast Sales of Jeans by Category: % Value Growth 2023-2028
- Table 87 Forecast Sales of Men's Jeans by Category: Volume 2023-2028
- Table 88 Forecast Sales of Men's Jeans by Category: Value 2023-2028
- Table 89 Forecast Sales of Men's Jeans by Category: % Volume Growth 2023-2028
- Table 90 Forecast Sales of Men's Jeans by Category: % Value Growth 2023-2028
- Table 91 Forecast Sales of Women's Jeans by Category: Volume 2023-2028
- Table 92 Forecast Sales of Women's Jeans by Category: Value 2023-2028
- Table 93 Forecast Sales of Women's Jeans by Category: % Volume Growth 2023-2028
- Table 94 Forecast Sales of Women's Jeans by Category: % Value Growth 2023-2028

Hosiery in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers cut back on hosiery purchases as price rise

Samakiea Co leads with competitively-priced quality products

Players focus on export markets to support financial situation

PROSPECTS AND OPPORTUNITIES

Muted constant volume in 2024

Local manufacturers to remain stronghold in hosiery

Sheer hosiery to register higher growth

CATEGORY DATA

- Table 95 Sales of Hosiery by Category: Volume 2018-2023
- Table 96 Sales of Hosiery by Category: Value 2018-2023
- Table 97 Sales of Hosiery by Category: % Volume Growth 2018-2023
- Table 98 Sales of Hosiery by Category: % Value Growth 2018-2023
- Table 99 NBO Company Shares of Hosiery: % Value 2019-2023
- Table 100 LBN Brand Shares of Hosiery: % Value 2020-2023
- Table 101 Forecast Sales of Hosiery by Category: Volume 2023-2028
- Table 102 Forecast Sales of Hosiery by Category: Value 2023-2028
- Table 103 Forecast Sales of Hosiery by Category: % Volume Growth 2023-2028
- Table 104 Forecast Sales of Hosiery by Category: % Value Growth 2023-2028

Footwear in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Footwear witnesses decline in volume sales

Consumers opt to buy footwear during promotional periods

Social media sellers offer premium footwear at attractive prices

PROSPECTS AND OPPORTUNITIES

Footwear category faces solid growth potential adidas Group to retain its strong position

Local manufacturers to elevate focus on footwear

CATEGORY DATA

Table 105 - Sales of Footwear by Category: Volume 2018-2023

Table 106 - Sales of Footwear by Category: Value 2018-2023

Table 107 - Sales of Footwear by Category: % Volume Growth 2018-2023

Table 108 - Sales of Footwear by Category: % Value Growth 2018-2023

Table 109 - NBO Company Shares of Footwear: % Value 2019-2023

Table 110 - LBN Brand Shares of Footwear: % Value 2020-2023

Table 111 - Distribution of Footwear by Format: % Value 2018-2023

Table 112 - Forecast Sales of Footwear by Category: Volume 2023-2028

Table 113 - Forecast Sales of Footwear by Category: Value 2023-2028

Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2023-2028

Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2023-2028

Sportswear in Egypt

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sportswear is hit hard by the cost of living crisis

Price sensitivity drives search for discounts and promotions

Local sportswear brands reach consumers via e-commerce

PROSPECTS AND OPPORTUNITIES

Healthier lifestyles to fuel demand for sportswear adidas Group poised to retain leadership E-commerce channel to spearhead growth

CATEGORY DATA

Table 116 - Sales of Sportswear by Category: Value 2018-2023

Table 117 - Sales of Sportswear by Category: % Value Growth 2018-2023

Table 118 - NBO Company Shares of Sportswear: % Value 2019-2023

Table 119 - LBN Brand Shares of Sportswear: % Value 2020-2023

Table 120 - Distribution of Sportswear by Format: % Value 2018-2023

Table 121 - Forecast Sales of Sportswear by Category: Value 2023-2028

Table 122 - Forecast Sales of Sportswear by Category: % Value Growth 2023-2028

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-egypt/report.