

# Discounters in South Africa

April 2023

Table of Contents

## KEY DATA FINDINGS

### 2022 DEVELOPMENTS

Discounters attracts price-sensitive consumers  
Pick 'n' Pay Retailers invests ZAR1.4 billion in Boxer stores  
Shoprite diversifies offerings to include full-scale banking services

### PROSPECTS AND OPPORTUNITIES

Discounters will remain one of fastest-growing grocery retail channels  
Discounters will remain highly concentrated competitive landscape  
Digitalisation set to improve overall experience

### CHANNEL DATA

Table 1 - Discounters: Value Sales, Outlets and Selling Space 2017-2022  
Table 2 - Discounters: Value Sales, Outlets and Selling Space: % Growth 2017-2022  
Table 3 - Discounters GBO Company Shares: % Value 2018-2022  
Table 4 - Discounters GBN Brand Shares: % Value 2019-2022  
Table 5 - Discounters LBN Brand Shares: Outlets 2019-2022  
Table 6 - Discounters Forecasts: Value Sales, Outlets and Selling Space 2022-2027  
Table 7 - Discounters Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027

## Retail in South Africa - Industry Overview

### EXECUTIVE SUMMARY

Retail in 2022: The big picture  
Competition intensifies as retailers diversify their portfolios  
Retail e-commerce remains the fastest growing channel  
What next for retail?

### OPERATING ENVIRONMENT

Informal retail  
Opening hours for physical retail  
Summary 1 - Standard Opening Hours by Channel Type 2022  
Seasonality  
Christmas  
Back to School

### MARKET DATA

Table 8 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2017-2022  
Table 9 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2017-2022  
Table 10 - Sales in Retail Offline by Channel: Value 2017-2022  
Table 11 - Sales in Retail Offline by Channel: % Value Growth 2017-2022  
Table 12 - Retail Offline Outlets by Channel: Units 2017-2022  
Table 13 - Retail Offline Outlets by Channel: % Unit Growth 2017-2022  
Table 14 - Sales in Retail E-Commerce by Product: Value 2017-2022  
Table 15 - Sales in Retail E-Commerce by Product: % Value Growth 2017-2022  
Table 16 - Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022  
Table 17 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022  
Table 18 - Sales in Grocery Retailers by Channel: Value 2017-2022  
Table 19 - Sales in Grocery Retailers by Channel: % Value Growth 2017-2022  
Table 20 - Grocery Retailers Outlets by Channel: Units 2017-2022  
Table 21 - Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022

Table 22 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2017-2022  
Table 23 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2017-2022  
Table 24 - Sales in Non-Grocery Retailers by Channel: Value 2017-2022  
Table 25 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2017-2022  
Table 26 - Non-Grocery Retailers Outlets by Channel: Units 2017-2022  
Table 27 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2017-2022  
Table 28 - Retail GBO Company Shares: % Value 2018-2022  
Table 29 - Retail GBN Brand Shares: % Value 2019-2022  
Table 30 - Retail Offline GBO Company Shares: % Value 2018-2022  
Table 31 - Retail Offline GBN Brand Shares: % Value 2019-2022  
Table 32 - Retail Offline LBN Brand Shares: Outlets 2019-2022  
Table 33 - Retail E-Commerce GBO Company Shares: % Value 2018-2022  
Table 34 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022  
Table 35 - Grocery Retailers GBO Company Shares: % Value 2018-2022  
Table 36 - Grocery Retailers GBN Brand Shares: % Value 2019-2022  
Table 37 - Grocery Retailers LBN Brand Shares: Outlets 2019-2022  
Table 38 - Non-Grocery Retailers GBO Company Shares: % Value 2018-2022  
Table 39 - Non-Grocery Retailers GBN Brand Shares: % Value 2019-2022  
Table 40 - Non-Grocery Retailers LBN Brand Shares: Outlets 2019-2022  
Table 41 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2022-2027  
Table 42 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2022-2027  
Table 43 - Forecast Sales in Retail Offline by Channel: Value 2022-2027  
Table 44 - Forecast Sales in Retail Offline by Channel: % Value Growth 2022-2027  
Table 45 - Forecast Retail Offline Outlets by Channel: Units 2022-2027  
Table 46 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2022-2027  
Table 47 - Forecast Sales in Retail E-Commerce by Product: Value 2022-2027  
Table 48 - Forecast Sales in Retail E-Commerce by Product: % Value Growth 2022-2027  
Table 49 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027  
Table 50 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027  
Table 51 - Forecast Sales in Grocery Retailers by Channel: Value 2022-2027  
Table 52 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2022-2027  
Table 53 - Forecast Grocery Retailers Outlets by Channel: Units 2022-2027  
Table 54 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027  
Table 55 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2022-2027  
Table 56 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2022-2027  
Table 57 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2022-2027  
Table 58 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2022-2027  
Table 59 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2022-2027  
Table 60 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2022-2027

## DISCLAIMER

## SOURCES

Summary 2 - 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/discounters-in-south-africa/report](http://www.euromonitor.com/discounters-in-south-africa/report).