

Apparel and Footwear in Indonesia

Market Direction | 2023-11-15 | 85 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

Report description:

Retail sales of apparel and footwear in Indonesia registered relatively modest growth in constant value terms in 2023, when compared to the previous two years. As the country emerged from the pandemic, Indonesians became increasingly keen to travel, socialise and spend more time outside the home. This fuelled demand for apparel and footwear in 2021 and 2022, as consumers paid more attention to their appearance. However, with the normalisation of consumer lifestyles in 2023, the rate of growth mo...

Euromonitor International's Apparel and Footwear in Indonesia report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data 2018-2022 and analysis by distribution format allowing you to identify the sectors driving growth. It identifies the leading companies, leading brands, and offers strategic analysis of key factors influencing the market. Forecasts to 2027 illustrate how the market is set to change.

Product coverage: Apparel, Footwear, Sportswear.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Apparel and Footwear market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

Table of Contents:

Apparel and Footwear in Indonesia Euromonitor International February 2024

List Of Contents And Tables

APPAREL AND FOOTWEAR IN INDONESIA

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

WOMENSWEAR IN INDONESIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slower growth for womenswear in 2023, as consumers remain cautious about discretionary spending

Modest wear and Korean fashion are key drivers of growth

Social media marketing remains important, especially when targeting younger consumers

PROSPECTS AND OPPORTUNITIES

Modest wear will represent a growing opportunity for womenswear businesses

Closure of TikTok Shop presents opportunities for Shopee

Uniqlo to forge ahead as local players make their mark

CATEGORY DATA

Table 103 Sales of Womenswear by Category: Volume 2018-2023

Table 104 Sales of Womenswear by Category: Value 2018-2023

Table 105 Sales of Womenswear by Category: % Volume Growth 2018-2023

Table 106 Sales of Womenswear by Category: % Value Growth 2018-2023

Table 107 NBO Company Shares of Womenswear: % Value 2019-2023

Table 108 LBN Brand Shares of Womenswear: % Value 2020-2023

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 109 NBO Company Shares of Women's Nightwear: % Value 2019-2023

Table 110 LBN Brand Shares of Women's Nightwear: % Value 2020-2023

Table 111 NBO Company Shares of Women's Outerwear: % Value 2019-2023

Table 112 ☐LBN Brand Shares of Women's Outerwear: % Value 2020-2023

Table 113 NBO Company Shares of Women's Swimwear: % Value 2019-2023

Table 114 ☐LBN Brand Shares of Women's Swimwear: % Value 2020-2023

Table 115 ☐NBO Company Shares of Women's Underwear: % Value 2019-2023

Table 116 ☐LBN Brand Shares of Women's Underwear: % Value 2020-2023

Table 117 [Forecast Sales of Womenswear by Category: Volume 2023-2028

Table 118 [Forecast Sales of Womenswear by Category: Value 2023-2028

Table 119 [Forecast Sales of Womenswear by Category: % Volume Growth 2023-2028

Table 120 [Forecast Sales of Womenswear by Category: % Value Growth 2023-2028

MENSWEAR IN INDONESIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Casual-inspired designs shape the menswear industry

Local brands gain prominence, thanks to popularity of batik

Rise of digital media contributes to growing male interest in fashion

PROSPECTS AND OPPORTUNITIES

Younger generation will drive future growth in menswear

Uniqlo to continue as leading player, thanks to its innovative marketing approach

Collaborations between brands will give players access to untapped audiences

CATEGORY DATA

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

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

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

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

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

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

Table 19 NBO Company Shares of Men's Outerwear: % Value 2019-2023

Table 20 LBN Brand Shares of Men's Outerwear: % Value 2020-2023

Table 21 NBO Company Shares of Men's Swimwear: % Value 2019-2023

Table 22 □LBN Brand Shares of Men's Swimwear: % Value 2020-2023

Table 23 [NBO Company Shares of Men's Underwear: % Value 2019-2023

Table 24 ☐LBN Brand Shares of Men's Underwear: % Value 2020-2023

Table 25 ☐Forecast Sales of Menswear by Category: Volume 2023-2028

Table 26 ∏Forecast Sales of Menswear by Category: Value 2023-2028

Table 27 [Forecast Sales of Menswear by Category: % Volume Growth 2023-2028

Table 28 | Forecast Sales of Menswear by Category: % Value Growth 2023-2028

CHILDRENSWEAR IN INDONESIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Slower growth in childrenswear in 2023

Comfort remains an important consideration for parents, but fashion is having a greater impact, due to rise of social media

Local independent brands continue to dominate the competitive landscape

PROSPECTS AND OPPORTUNITIES

Local brands will continue to dominate sales

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Social responsibility will become more of a priority

Brand collaborations will gather pace, as Blibli links up with Lee Vierra Kids to launch its own children's swimwear collection CATEGORY DATA

Table 29 Sales of Childrenswear by Category: Volume 2018-2023

Table 30 Sales of Childrenswear by Category: Value 2018-2023

Table 31 Sales of Childrenswear by Category: % Volume Growth 2018-2023

Table 32 Sales of Childrenswear by Category: % Value Growth 2018-2023

Table 33 NBO Company Shares of Childrenswear: % Value 2019-2023

Table 34 LBN Brand Shares of Childrenswear: % Value 2020-2023

Table 35 Forecast Sales of Childrenswear by Category: Volume 2023-2028

Table 36 Forecast Sales of Childrenswear by Category: Value 2023-2028

Table 37 Forecast Sales of Childrenswear by Category: % Volume Growth 2023-2028 Table 38 | Forecast Sales of Childrenswear by Category: % Value Growth 2023-2028

SPORTSWEAR IN INDONESIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Modest sportswear enters the mainstream

Yoga and Pilates fuel growth in women's activewear

Sports footwear sees sales boosted by adoption of casual office dress codes

PROSPECTS AND OPPORTUNITIES

Continuation of athleisure trend will contribute to healthy growth

Growing number of brands will look to penetrate modest sportswear

Adidas' new concept store promises to become a key fashion destination

CATEGORY DATA

Table 39 Sales of Sportswear by Category: Value 2018-2023

Table 40 Sales of Sportswear by Category: % Value Growth 2018-2023

Table 41 NBO Company Shares of Sportswear: % Value 2019-2023

Table 42 LBN Brand Shares of Sportswear: % Value 2020-2023

Table 43 Distribution of Sportswear by Format: % Value 2018-2023

Table 44 Forecast Sales of Sportswear by Category: Value 2023-2028

Table 45 Forecast Sales of Sportswear by Category: % Value Growth 2023-2028

JEANS IN INDONESIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for lower-priced jeans declines in 2023, as consumers cut back on expenditure

Rise of planet-friendly denim

Uniqlo maintains its leadership, thanks to its broad range of products, quality image and competitive pricing

PROSPECTS AND OPPORTUNITIES

Healthy growth expected, with men's jeans leading the way

E-commerce will see further investment

Jiniso targets young Indonesians with high-quality offerings, while MAPI shelves collaboration with Pepe Jeans

CATEGORY DATA

Table 46 Sales of Jeans by Category: Volume 2018-2023

Table 47 Sales of Jeans by Category: Value 2018-2023

Table 48 Sales of Jeans by Category: % Volume Growth 2018-2023 Table 49 Sales of Jeans by Category: % Value Growth 2018-2023

Table 50 Sales of Men's Jeans by Category: Volume 2018-2023

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 51 Sales of Men's Jeans by Category: Value 2018-2023

Table 52 Sales of Men's Jeans by Category: % Volume Growth 2018-2023

Table 53 Sales of Men's Jeans by Category: % Value Growth 2018-2023

Table 54 Sales of Women's Jeans by Category: Volume 2018-2023

Table 57 [Sales of Women's Jeans by Category: % Value Growth 2018-2023

Table 58 \square NBO Company Shares of Jeans: % Value 2019-2023

Table 59 [LBN Brand Shares of Jeans: % Value 2020-2023

Table 60 [Forecast Sales of Jeans by Category: Volume 2023-2028

Table 61 ☐Forecast Sales of Jeans by Category: Value 2023-2028

Table 62 ☐ Forecast Sales of Jeans by Category: % Volume Growth 2023-2028

Table 63 ☐Forecast Sales of Jeans by Category: % Value Growth 2023-2028

Table 64 | Forecast Sales of Men's Jeans by Category: Volume 2023-2028

Table 65 ☐Forecast Sales of Men's Jeans by Category: Value 2023-2028

Table 66 ∏Forecast Sales of Men's leans by Category: % Volume Growth 2023-2028

Table 67 ☐Forecast Sales of Men's Jeans by Category: % Value Growth 2023-2028

Table 68 [Forecast Sales of Women's Jeans by Category: Volume 2023-2028

Table 69 [Forecast Sales of Women's Jeans by Category: Value 2023-2028

Table 70 [Forecast Sales of Women's Jeans by Category: % Volume Growth 2023-2028

Table 71 [Forecast Sales of Women's Jeans by Category: % Value Growth 2023-2028

HOSIERY IN INDONESIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Limited growth in 2023, despite growing athleisure trend

Increasing usage of hosiery with health benefits

Competitive landscape remains highly fragmented, with little brand loyalty

PROSPECTS AND OPPORTUNITIES

Slow recovery, expected, due to consumer preference for lightweight footwear

Non-sheer hosiery to remain biggest attraction

Local brands to gain prominence in performance socks

CATEGORY DATA

Table 72 Sales of Hosiery by Category: Volume 2018-2023

Table 73 Sales of Hosiery by Category: Value 2018-2023

Table 74 Sales of Hosiery by Category: % Volume Growth 2018-2023

Table 75 Sales of Hosiery by Category: % Value Growth 2018-2023

Table 76 NBO Company Shares of Hosiery: % Value 2019-2023

Table 77 LBN Brand Shares of Hosiery: % Value 2020-2023

Table 78 Forecast Sales of Hosiery by Category: Volume 2023-2028

Table 79 Forecast Sales of Hosiery by Category: Value 2023-2028

Table 80 Forecast Sales of Hosiery by Category: % Volume Growth 2023-2028

Table 81 [Forecast Sales of Hosiery by Category: % Value Growth 2023-2028

APPAREL ACCESSORIES IN INDONESIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Decline in mask wearing has negative impact on sales

Hijabs cater to a variety of tastes and preferences

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Pashminas are very much on-trend

PROSPECTS AND OPPORTUNITIES

Burgeoning hijab movement will help to drive growth over the forecast period

Sports hijabs will meet the needs of active Muslim women

H&M will continue as leading player in highly fragmented marketplace

CATEGORY DATA

Table 82 Sales of Apparel Accessories by Category: Volume 2018-2023

Table 83 Sales of Apparel Accessories by Category: Value 2018-2023

Table 84 Sales of Apparel Accessories by Category: % Volume Growth 2018-2023

Table 85 Sales of Apparel Accessories by Category: % Value Growth 2018-2023

Table 86 NBO Company Shares of Apparel Accessories: % Value 2019-2023

Table 87 LBN Brand Shares of Apparel Accessories: % Value 2020-2023

Table 88 Forecast Sales of Apparel Accessories by Category: Volume 2023-2028

Table 89 Forecast Sales of Apparel Accessories by Category: Value 2023-2028

Table 90 Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028

Table 91 [Forecast Sales of Apparel Accessories by Category: % Value Growth 2023-2028

FOOTWEAR IN INDONESIA

KEY DATA FINDINGS

2023 DEVELOPMENTS

Lower ticket items gain momentum

Social media marketing gathers pace

Local brands enjoy rising interest while sportswear brands continue to grow

PROSPECTS AND OPPORTUNITIES

Healthy growth expected, with casual styles leading the way

Domestic players face ongoing challenges

MAPA partners with Aldo International Group to manage 21 stores in Indonesia

CATEGORY DATA

Table 92 Sales of Footwear by Category: Volume 2018-2023

Table 93 Sales of Footwear by Category: Value 2018-2023

Table 94 Sales of Footwear by Category: % Volume Growth 2018-2023

Table 95 Sales of Footwear by Category: % Value Growth 2018-2023

Table 96 NBO Company Shares of Footwear: % Value 2019-2023

Table 97 LBN Brand Shares of Footwear: % Value 2020-2023

Table 98 Distribution of Footwear by Format: % Value 2018-2023

Table 99 Forecast Sales of Footwear by Category: Volume 2023-2028

Table 100 Forecast Sales of Footwear by Category: Value 2023-2028

Table 101 \square Forecast Sales of Footwear by Category: % Volume Growth 2023-2028

Table 102 \square Forecast Sales of Footwear by Category: % Value Growth 2023-2028



☐ - Print this form

To place an Order with Scotts International:

 $\hfill \Box$ - Complete the relevant blank fields and sign

Apparel and Footwear in Indonesia

Market Direction | 2023-11-15 | 85 pages | Euromonitor

	Single User Licence			
	1			€1750.00
	Multiple User License (1 Site)			€3500.00
	Multiple User License (Global)			€5250.00
			VAT	
			Total	
mail*		Phone*		
irst Name*		Last Name*		
b title*				
ompany Name*		EU Vat / Tax ID / NIP number*		
ddress*		City*		
Zip Code*		Country*		
iip code				
ip code		Date	2025-05-11	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com www.scotts-international.com