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African Powers of Retailing 2015
New horizons for growth

Retail trends

The informal retail market is still significant and represents approximately 90% of transactions in Africa

There is an increase in omni-channel strategy adoption as the African eCommerce market is expected to be worth US$50 bil by 2018, compared to US$8 bil in 2013

South African retailers are focusing on expansion outside of the continent in countries that are showing recovery and access to an established consumer base

International retailers are still eager to establish a footprint in Africa despite many retail barriers to entry: 2 of the top 25 are subsidiaries of multinational firms

Grocery retailing drives the industry and accounted for 64.8% of the total retail sales across the continent in 2013

Forecourt retailing has grown to almost 4% of South Africa's retail market as several South African retailers collaborate with forecourt owners

Top 25 African retailers highlights

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The African Powers of Retailing report identifies the top 25 listed African retailers by revenue in FY13. Its methodology can be found in the full report.

Food and beverage sector contribution to the top 25 collective revenue 52.5%

US$44.3 bn Collectively earned revenue of the top 25

5.3 Average number of countries in which a top 25 retailer has operations

Composite net profit margin for the top 25 5.4%

Average retail revenue size of the top 25 US$1.7 bn

Who's growing the fastest?

Y-o-y

1. Choppies Enterprises Ltd, Botswana	24.4%
2. Zambeef Products Plc, Zambia	23.0%
3. Mr Price Group Ltd, South Africa	15.0%
4. The Foschini Group Ltd, South Africa	13.6%
5. Woolworths Holdings Ltd, South Africa	12.7%
6. Société Magasin Général SA, Tunisia	11.3%
7. The SPAR Group Ltd, South Africa	10.7%
8. Shoprite Holdings Ltd, South Africa	10.5%
9. Massmart Holdings Ltd, South Africa	9.8%
10. Furnmart Ltd, South Africa	8.9%

Source: Published company data and Deloitte analysis ource: Published company data and Deloitte analysis

Regional profiles

Region	Number of companies headquartered in the region	Average retail revenue (US$ million rounded)	Share of top 25 revenue
Top 25	25	1 772	100%
Southern Africa	17	2 441	93.7%
East Africa	5	246	2.8%
North Africa	2	568	2.6%
West Africa	1	445	1.%
Central Africa	-	-	0.0%

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Download the full report on www.deloitte.com/za/africanpowersofretailing