Re_fashion

Annual barometer of consumption of textiles and footwear in France

Purchasing trends and behavior
for clothing, footwear
and household linen

17.06.2025

Who is Refashion?

Refashion is the eco-organization for the clothing, household linen and footwear sector in France.

Its mission is to mobilize professionals and the general public to reduce the environmental impact of textiles and footwear, throughout their entire life cycle.

As an eco-organization, its missions and objectives are very precisely defined in a set of specifications controlled annually by the public authorities.

Annual barometer of consumption of textiles and footwear in France

A unique and precious source:

- Refashion is the only entity to have national data on the volume of products placed into the market, as declared by brands (over 10,000 reporting marketers).

An enhanced vision for 2025 :

- A first part on the sale of new products in 2024 in France.
- A second part on the state of the second-hand market in France in 2023.

State of new textile and footwear sales in France in 2024

Part 1

Methodology: data based on market declarations in France,
sales or donations, in volume, for new items (number of items) by 10,735 declarants.

Big Picture

3.5 billions

of new items sold over 2024,
VS 3.4 billion in 2023

→ or nearly 10 million new items sold every day

Clothing
2,886 million

Stockings: 632 million
Underwear and lingerie: 437 million
T-shirts: 434 million

Footwear
259 million

Sneakers: 107 million
Summer shoes: 60 million
Closed shoes: 51 million

Household linen
362 million

Bed linen: 120 million
Bath linen: 99 million
Table linen: 18 million

Key Facts

2024 marked by a recovery in sales after an overall economic slowdown

Sales on the rise again

	2019	2020	2021	2022	2023	2024
Volume *(in millions of items)*	3 138 M	2 794 M	3 299 M	3 486 M	3 408 M	3 507 M
Change vs N-1	+7,9%	-11,0%	+18,1%	+6,0%	-2,3%	+ 2,9%

Focus on sales growth

→	Change vs n-1	Weight in sales
Clothing	+67 M +2,4%	82%
Household linen	+31 M +9,3%	10%
Footwear	+1,4 M +0,6%	8%

Women +5,0%

Men +3,6%

→	Change vs n-1	Weight in sales
Woman	+42 M +4,1%	45%
Men	+20 M +3,5%	25%
Child	-3 M -0,6%	20%
Baby	-12 M -5,4%	10%

% excluding household linen and mixed products (socks, etc.), accessories and special items

- By 2024, all segments are growing (vs. only household linen in 2023).
- Apparel alone accounts for 68% of the increase in volume: 67 million more items of apparel than in 2023.
- Household linen is the fastest-growing market segment: +9.3%, and now accounts for 10% of the sector's sales.
- The recovery mainly concerns the adult market, with children's sales declining and baby sales decreasing

Key Facts

The French dressing room in 2024: a women's wardrobe on the rise again

Wardrobe in France
Clothing

On average in 2024, on the French market, it was bought
42 (+1)*
new clothing per person
including 26 (+1) clothes
(-/+) change vs. 2023

Women's and men's wardrobes are on the **rise** again, with 1 more new item purchased than in 2023, particularly for women's sweaters.

Children: a **stable** wardrobe, mainly made up of t-shirts.

Baby: fewer purchases of new textiles in the baby department, with more purchases of clothing to the detriment of less visible items such as stocking and underwear.

Woman

32
+1
pieces/year
including 24 (+1) clothes

T-shirt	6
Sweater	3 (+1)
Dress pants/jeans	3
Dresses	2
Pyjamas and homewear	2
Shirt	2
Underwear, stockings & lingerie	8

Men

19
+1
pieces/year
including 15 clothes

T-shirt	6
Sweater	2
Casual pants, including jeans	2
Underwear, stockings & lingerie	4

Children
(ages 4-14)

49
=
pieces/year
including 39 clothes

T-shirt	12
Sweater	5
Trousers/jeans	5 (+1)
Sports pants and sportswear	4
Pyjamas and homewear	3
Underwear, stockings & lingerie	10 (-1)

Baby
(0-3 years)

76
-2
pieces/year
including 44 clothes

Clothing	44 (+2)
Socks and bodysuits	29 (-1)
Other	3 (-3)

***Reading key**: in France in 2024, 6 new t-shirts were purchased in the women's department, a stable figure compared to 2023.*

% Excluding mixed products (socks, hosiery, etc.), accessories and special items

**Average figure based on the weighting of Women, Men, Children, and Babies.*

Wardrobe in France
footwear

On average in 2024, on the French market, it was bought

4

pairs of new footwear per person

(-/+) change vs. 2023

Woman	Men	Children (ages 4-14)	Baby (0-3 years)
3	**3**	**6** **+1**	**5**
pairs/year	**pairs/year**	**pairs/year**	**pairs/year**
of which	of which	of which	
sneakers : 1	sneakers : 2	sneakers : 3	
closed shoes: 1	closed shoes: 0.5	closed shoes: 1	
summer footwear: 1	summer footwear: 0.5	summer footwear: 1	

Reading key: *in France over 2024, 3 pairs of new footwear were purchased in the women's department.*

Excluding mixed parts: footwear, indoor footwear

The closet in France
household linen

On average in 2024, on the French market, it was bought

12 (+1)

new household linen items per household

(-/+) change vs. 2023

bed linen	bath linen	table linen	other
4 +1	3	1	4

***Reading key*:** *in France in 2024, there were 4 new bed linen items purchased per household, one more than last year.*

Household linen has continued to grow over the past 2 years, with the arrival of pure players and discounters in this segment.

#3

Key Facts

A recovery that affects all items in the wardrobe

Focus on apparel

Key facts

A rebound that benefits almost to the entire wardrobe, including the unseen pieces underneath.

4 categories alone account for 90% of the increase: stockings, t-shirts, sweaters, casual/jeans pants.

Some categories are declining:
- baby clothes: compete with second-hand purchases and declining birth rates
- shirts and suit : because of the casual wear trend
- dresses and skirts: less favourable weather for summer pieces and a trend towards a less "gendered" style among women, particularly younger women

→	Volume 2024 In millions of items	Weight on clothing In %	Evolution vs. 2023 in volume
Clothing	**2 886**	**100%**	**+2,4%**
TOP 5 Increase			
Stockings / Underwear & Lingerie	**1 070**	**37%**	**+3,8%**
T-shirts	**434**	**15%**	**+2,6%**
Sweaters	**208**	**7%**	**+8,2%**
Casual pants / jeans	**199**	**7%**	**+8,6%**
Pants and sets sportswear	**107**	**4%**	**+7,3%**
TOP 5 Decline			
Baby clothes (0-36 months)	**200**	**7%**	**-5,0%**
Shirts	**93**	**3%**	**-3,5%**
Dresses	**83**	**3%**	**-2,2%**
Coats	**32**	**1%**	**-2%**
Skirts	**25**	**1%**	**-6%**

#4

Key Facts

Sneakers drive the footwear market

A sales recovery that also benefits footwear

Key facts

After a slowdown last year, the footwear market is on the up again, with 1.4 million more pairs sold in 2024.

- **Sneakers represent 4 out of every 10 pairs of footwear sold**, and are the fastest-growing segment. A segment that benefited in particular from **the "Olympic Games effect"**.
- The biggest drop was in summer shoes, with -5 million fewer pairs sold, due in particular to a very wet summer.

	Volume 2024 In millions of pairs of footwear	Weight on footwear In %	Evolution vs. 2023 in volume
Footwear	**259**	**100%**	**+0,6%**
Sportswear shoes: sneakers, tennis shoes	107	41%	+6,8%
Summer shoes	60	23%	-7,4%
Low shoes	27	10%	16,4%
Indoor footwear	27	10%	-3,1%
Boot-style footwear	15	6%	-12%
Baby footwear (0-36 months)	13	5%	-11%
Boots and waders	8	3%	3,5%

Reading key: *in France in 2024,* ***107 million*** *new sneakers were sold, representing 41% of the footwear market by volume. A category* ***up +6.8%*** *on 2023.*

Key Facts

A household linen market that continues to grow

Household linen: a high-growth market

Key facts

Like last year, this market continues to grow strongly, with 31 million more items placed into the market.

- A highly dynamic market, with 120 million new bed linen items sold in 2024, representing a 14.8% increase compared to 2023.
- Table linen is also growing strongly with an increase of 21.2% compared to 2023.

	Volume 2024 In millions of items	Weight on household linen In %	Evolution vs. 2023 in volume
Household linen	**362**	**100%**	**+9,3%**
Bed linen	120	33%	+14,8%
Bath linen	99	27%	+3,5%
Table linen	18	5%	+21,2%
Baby linen	8	2%	-16,2%
Other (cleaning products, etc.)	117	32%	+9,7%

Reading key *: in France in 2024,* ***120 million*** *new bed linen items were sold, representing 33% of the household linen market by volume. This category is* ***up +14.8%*** *on 2023.*

#6

Key Facts

Growth driven by pure players and discounters

Strong growth for pure players and discounters

Key facts

- **Pure players alone account for 72% of the increase**
- Pure players and discounters report double-digit growth, as in the previous year
- Excluding these two categories of players, the market remains relatively stable (-0.1%)
- Supermarkets are still experiencing a decline, though less significant than last year

	Evolution vs. 2023 by volume
Pure players*	+29,9%
Discounters**	+10,3%
Downtown / Shopping mall chains	+2,8%
Peripheral chains	+0,6%
Food superstores	-5,1%

Data covering 92% of products placed on the market

Reading key : *in France, pure players are up by 29.9% in 2024 compared to 2023.*

*Pure players: brands that distribute exclusively online.
** Discounters: chains/brands that sell discounted products on a permanent basis.

#7

Key Facts

“Very affordable” prices drive sales growth

An increase in demand for “very affordable prices”

Key facts

Context: after high inflation in 2023, which led the French to cut back on spending, is a rebound in consumption a simple "catch-up effect" or is long-term growth increasingly driven by the entry-level segment?

- As in 2023, **71% of French purchases were made on entry-level products** (priced below the market average).
- A growing appetence for entry-level products at "very affordable prices ».

KANTAR	Change vs. 2023 by volume	Weight Volume	Average new purchase price
Entry-level: index 0-100	-0,6%	71%	8,2€
including very accessible: index 0-50	*+2,7%*	*39%*	*4,2€*
Including accessible : index 50-100	*-4,4%*	*32%*	*13,1€*
Mid-range: index 1-2.5	-2,3%	25%	29€
High-end : >2,5	-1,4%	4%	68€

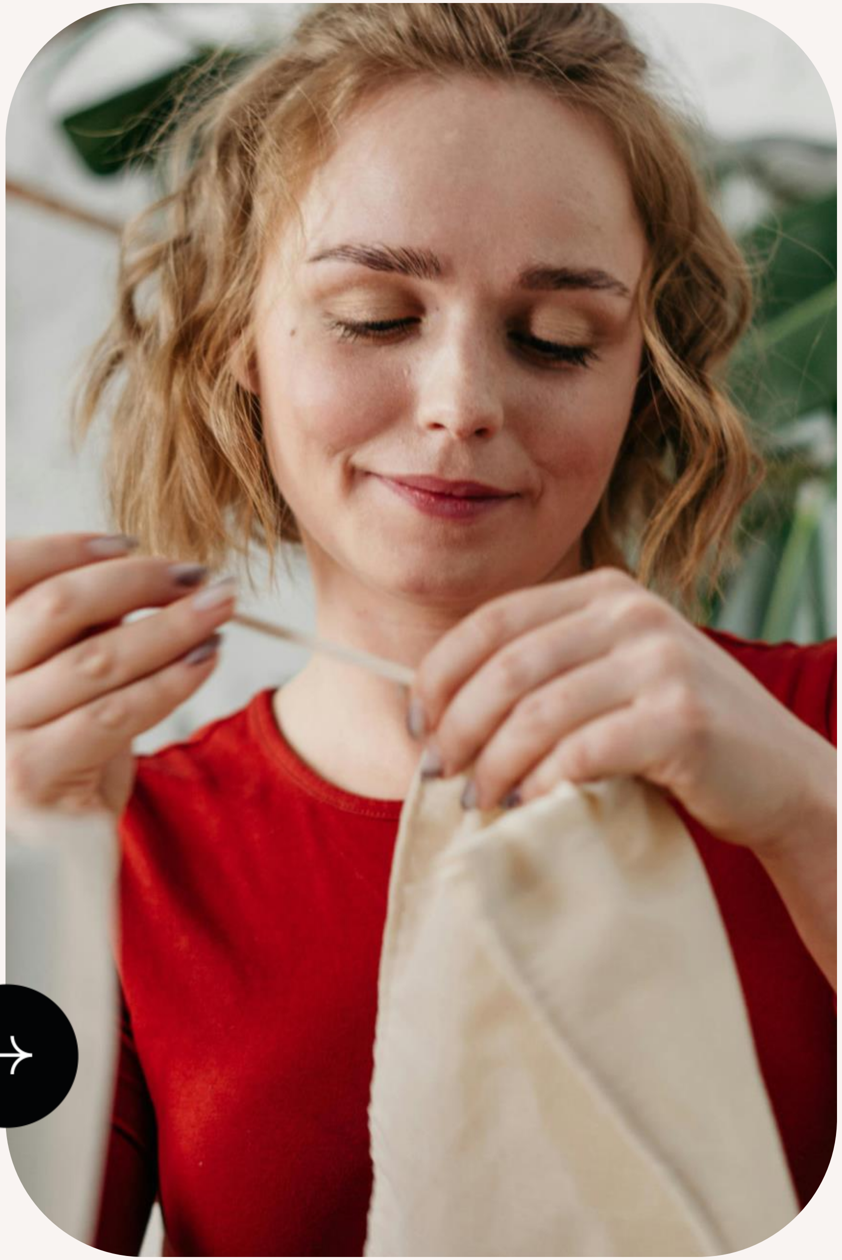
Average price of a new item: €15.6

Reading key : *The "very accessible" segment (prices between 0 and 50% of the total average price) accounts for 39% of purchases in volume, with an increase of +2.7% compared to 2023.*

Source: Kantar Worldpanel Fashion - Annual data 2024
Scope: purchase of new clothing, footwear and household linen.

The current situation of second-hand in 2023 in France

Part 2



2-part methodology:
1/ Overview of the second-hand sector: bibliographical study, Kantar data, directory of players, survey of 100 distribution outlets and more than 20 interviews.

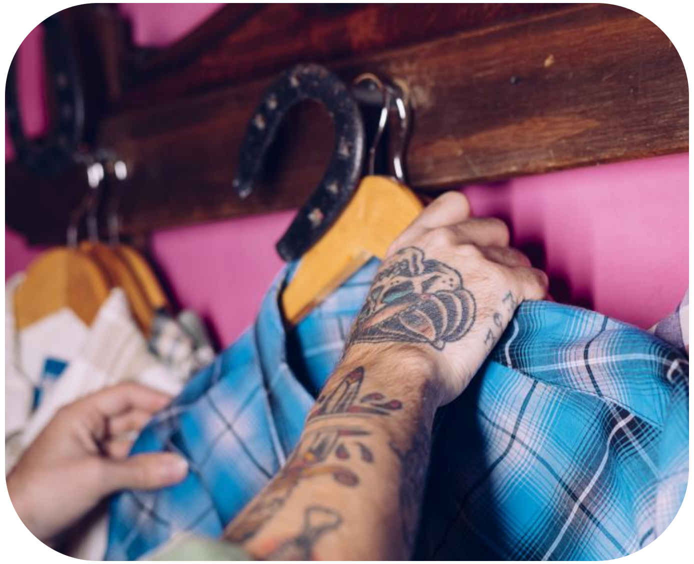
2/ Quantitative survey of a sample of 2,400 French people aged 16 and over
Argon / June Marketing study

Big picture

63,5 kt/an

second-hand sold in France,

representing 7.1% of total consumption of textiles and footwear



In 2023, French second-hand buyers purchased an average of

7,3 items

of textiles and footwear

Second-hand :
a promising dynamic to be transformed into a habit

31%

of second-hand buyers

try to substitute the new for the 2nde hand as much as possible.

More than

1/3

of French people

bought one or more items of 2nde hand in 2023 (38% rate of penetration) and 11% of buyers declared themselves to be exclusive second-hand buyers (i.e. 4% of the total French population).

Source: June / Kantar

State and evolution of the second-hand market in France in 2023:

Key facts

- In 15 years, digital platforms (C2C) have revolutionized the second-hand market, Vinted alone accounting for just over 1/4 of total volumes.

Breakdown of second-hand sales in 2023 in France by type of player :

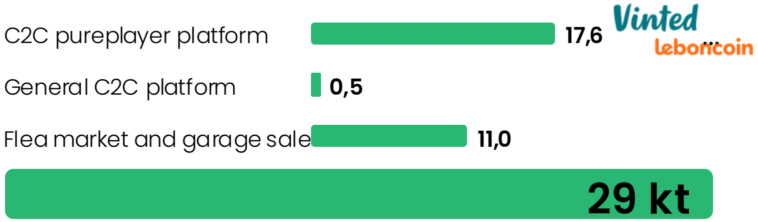
C2C 46%
Profit-driven entities facilitating connections between private individuals

ESS 33%
Associations and institutions dedicated to social integration solidarity, social utility

B2C 21%
Trading companies offering textiles from 2nde hand

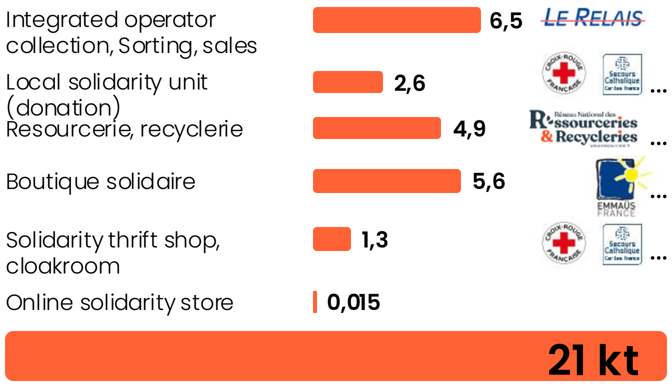
C2C Profit-driven entities facilitating connections between private individuals

Volume of 2nde hand Textiles and Footwear redistributed by operators (kt)



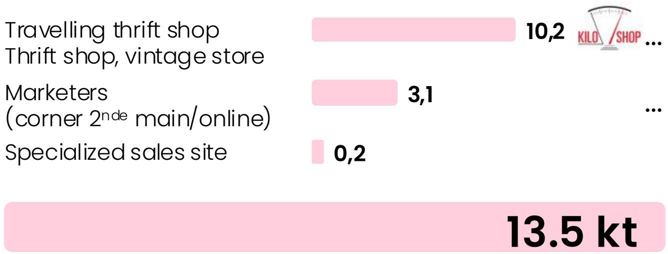
ESS Associations and establishments dedicated to social integration, solidarity and social utility

Volume of 2nde hand Textiles and Footwear redistributed by actor (kt)



B2C Cmpanies offering textiles from 2nde hand

Volume of 2nde hand Textiles and Footwear redistributed by actor (kt)

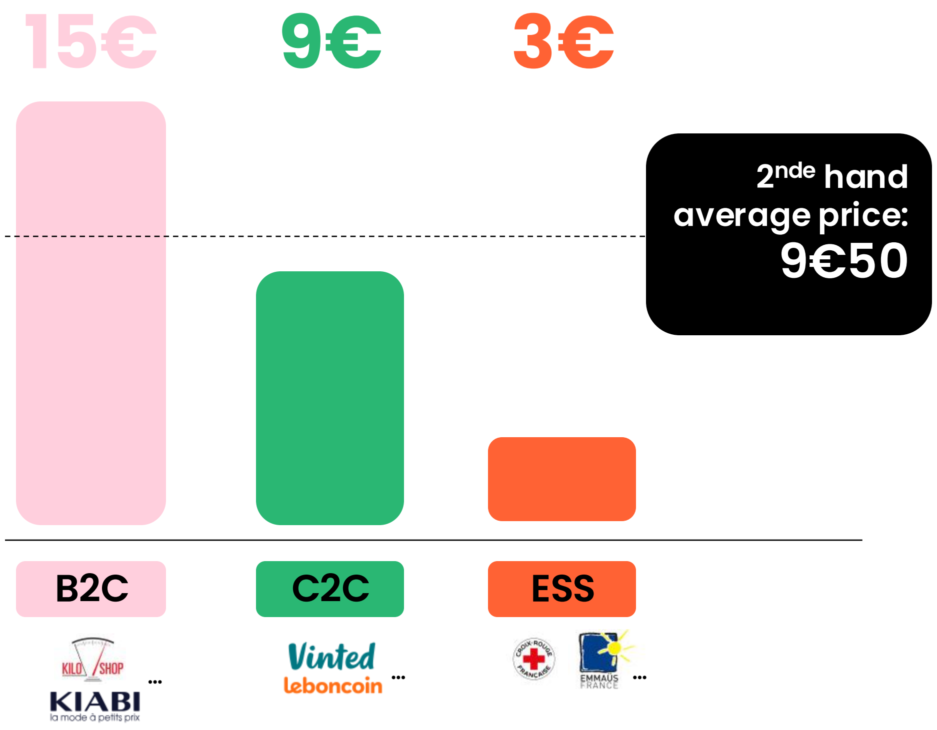


Sales prices vary depending on market players

Key facts

- On average, a second-hand item of clothing will cost €9.50 in 2023, compared to €15.60 for a new item in 2024 (and €8.20 for a new entry-level item!).
- The social and solidarity economy is positioned as highly accessible to the most disadvantaged social groups, selling clothing for just a few euros.
- C2C sales are positioned in the entry/mid-range segment and compete with ultra fast fashion.
- B2C sellers position themselves in the mid- to premium segment.

Average selling price per unit by actor category (in €)



***Average price of new item : 15€60**
***Average price for entry-level item : 8€20**

*Source : Kantar Worldpanel Fashion – Données Annuel 2024

In conclusion

To sum up 2024

#1 New textiles and footwear market on the rise

After a downturn in 2023, the textiles and footwear market is set to rise again in 2024, with **3.5 billion new items placed into the market, i.e. almost 10 million new items sold every day.**

#2 A recovery driven mainly by clothing

With 4 categories responsible for 90% of growth in this department: stockings, sweaters, casual/jeans pants and T-shirts.

#3 Contrast depending on section

- Progression for adults, women and men.
- **Decline in the children's and especially the baby section, with fewer births** and a shift towards second-hand items.

#4 Why the increase?

- The ever-increasing apetence for **"very accesible prices"** explains the rise, as shown by the **strong growth of pure players [+29.9%] and discounters [+10.3%].**
- And also a **"catch-up effect"**, linked to a less constrained household budget due to the lower impact of inflation than in previous years.

#5 An "Olympic Games effect"

2024 was also a year marked by an **"Olympic Games effect"**, particularly visible in sportswear/sneakers, where sales jumped +6.8%.

#6 Second-hand: a market in the making

38% of French people bought second-hand <u>in 2023</u>

A market pre-empted by sales between private individuals (46% of volume in tonnes)

What about tomorrow?

Major challenges surrounding the end of life of textiles and footwear to promote the circular economy in the sector and limit environmental impacts.

- Promoting circularity and second-hand
- Encouraging repair
- Developing recycling

It all starts with sorting and increasing collection.

Over 50,000 collection points in France

"Nothing is thrown away, everything is collected".