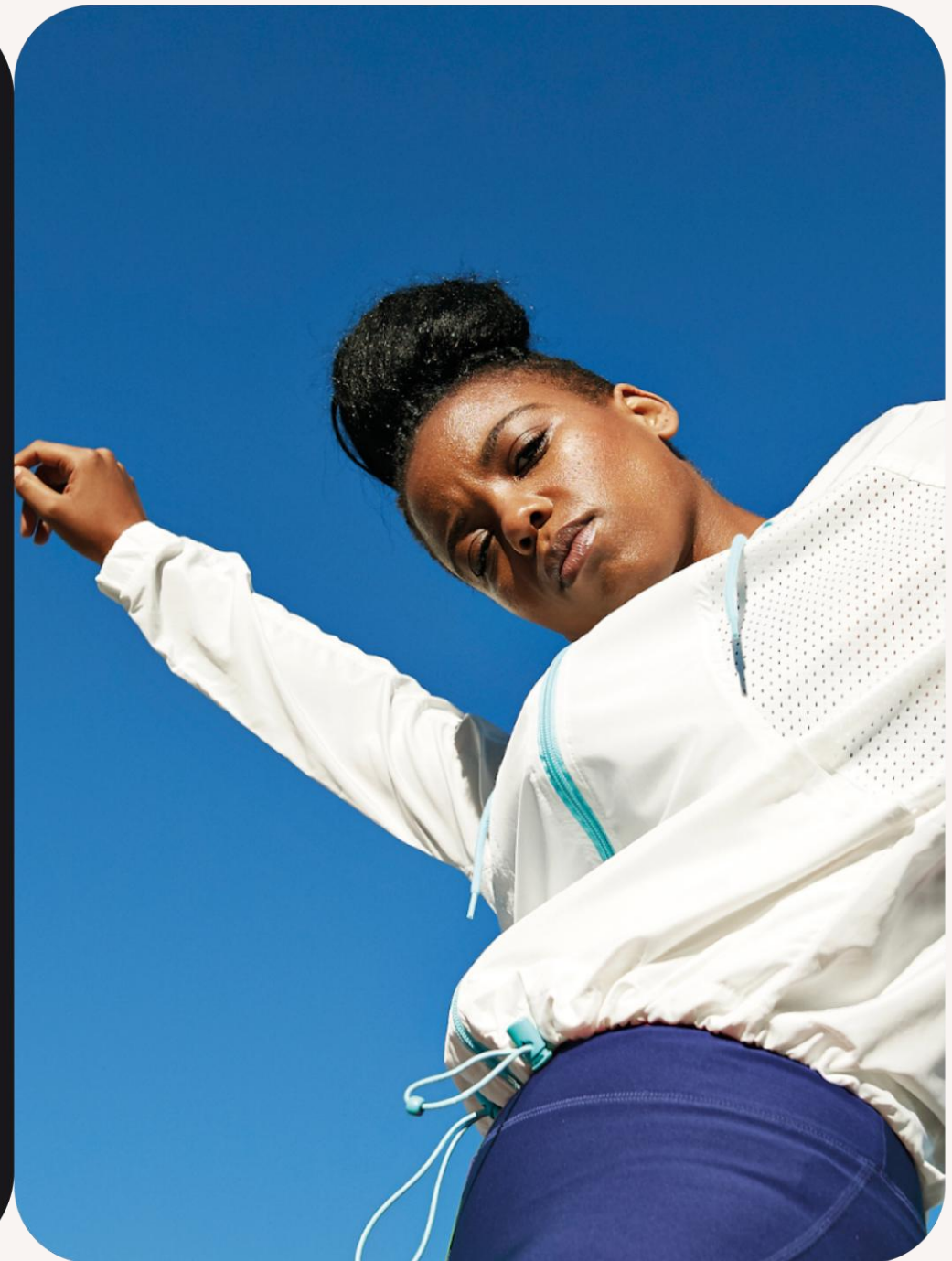


# Re\_fashion

## 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 :

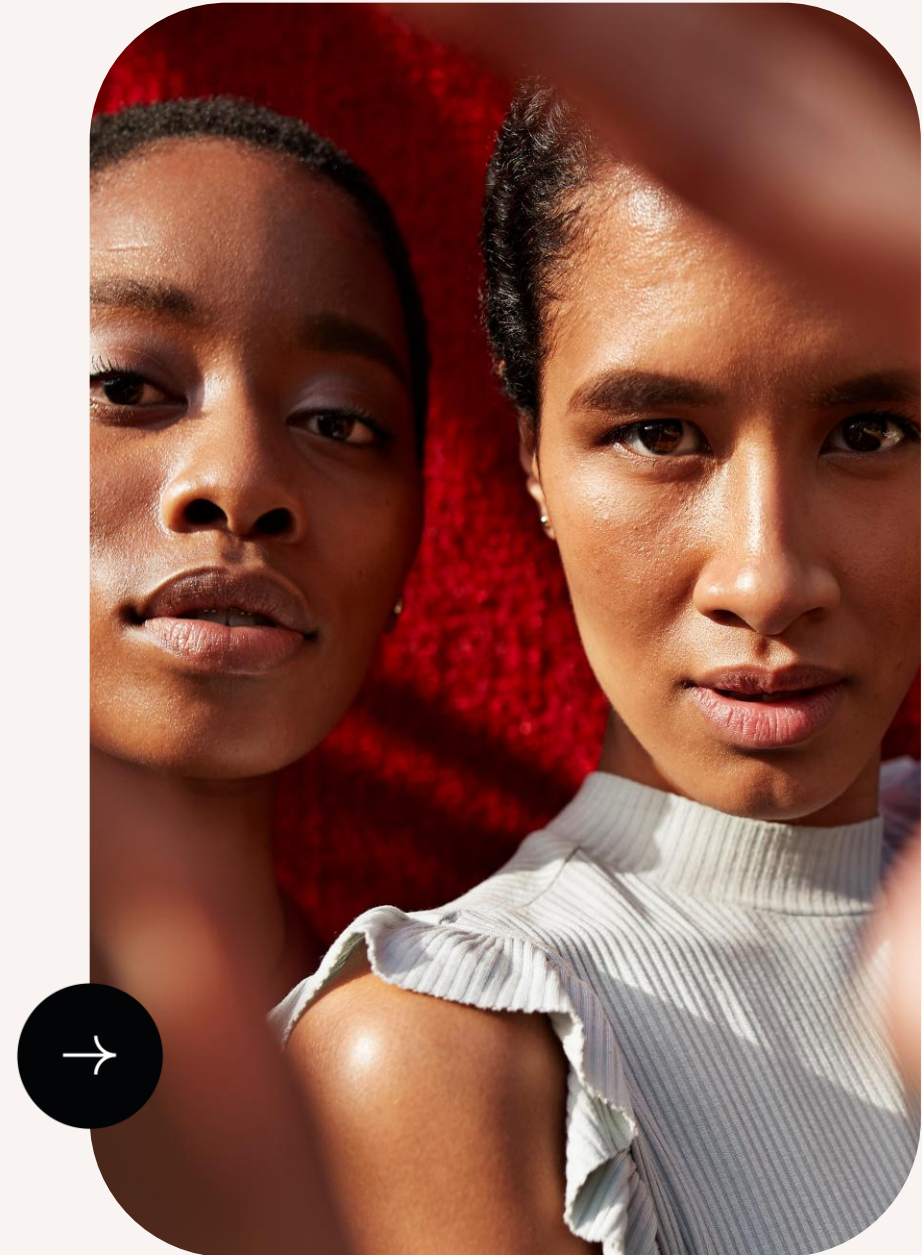
- A first part on the sale of new products in 2024 in France.
- A second part on the state of the second-hand market in France in 2023.



# 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

A large, light pink hashtag symbol (#) serves as a background for the text.

## 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
<b>Volume</b> <i>(in millions of items)</i>	3 138 M	2 794 M	3 299 M	3 486 M	3 408 M	3 507 M
<b>Change vs N-1</b>	+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



**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
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Men



**pieces/year**  
including 15 clothes

T-shirt	6
Sweater	2
Casual pants, including jeans	2

Underwear, stockings & lingerie	4
---------------------------------	---



Children  
(ages 4-14)



**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)
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Baby  
(0-3 years)



**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**



**pairs/year**  
of which  
sneakers : 1  
closed shoes: 1  
summer footwear: 1



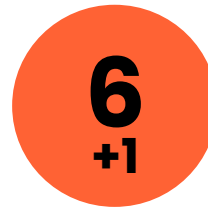
**Men**



**pairs/year**  
of which  
sneakers : 2  
closed shoes: 0.5  
summer footwear: 0.5



**Children**  
(ages 4-14)



**pairs/year**  
of which  
sneakers : 3  
closed shoes: 1  
summer footwear: 1



**Baby**  
(0-3 years)



**pairs/year**

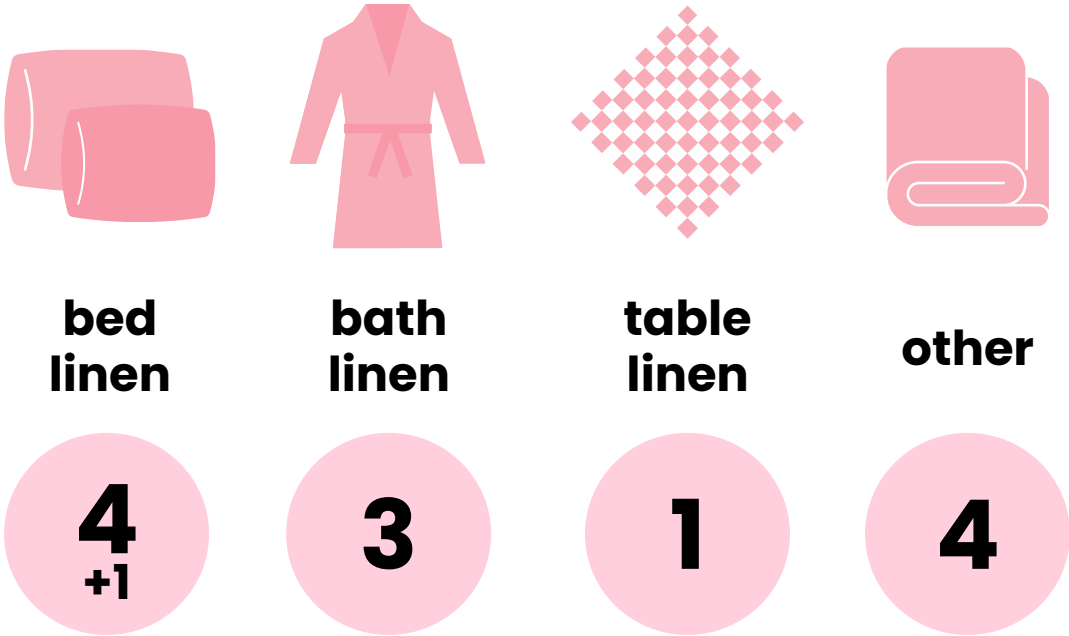
**Reading key:** in France over 2024, 3 pairs of new footwear were purchased in the women's department.  
Excluding mixed parts: footwear, indoor footwear

# 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



**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.

## 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%

## 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.

## 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.

A large, light pink hashtag symbol (#) serves as a background for the text.

## 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 appetite 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.

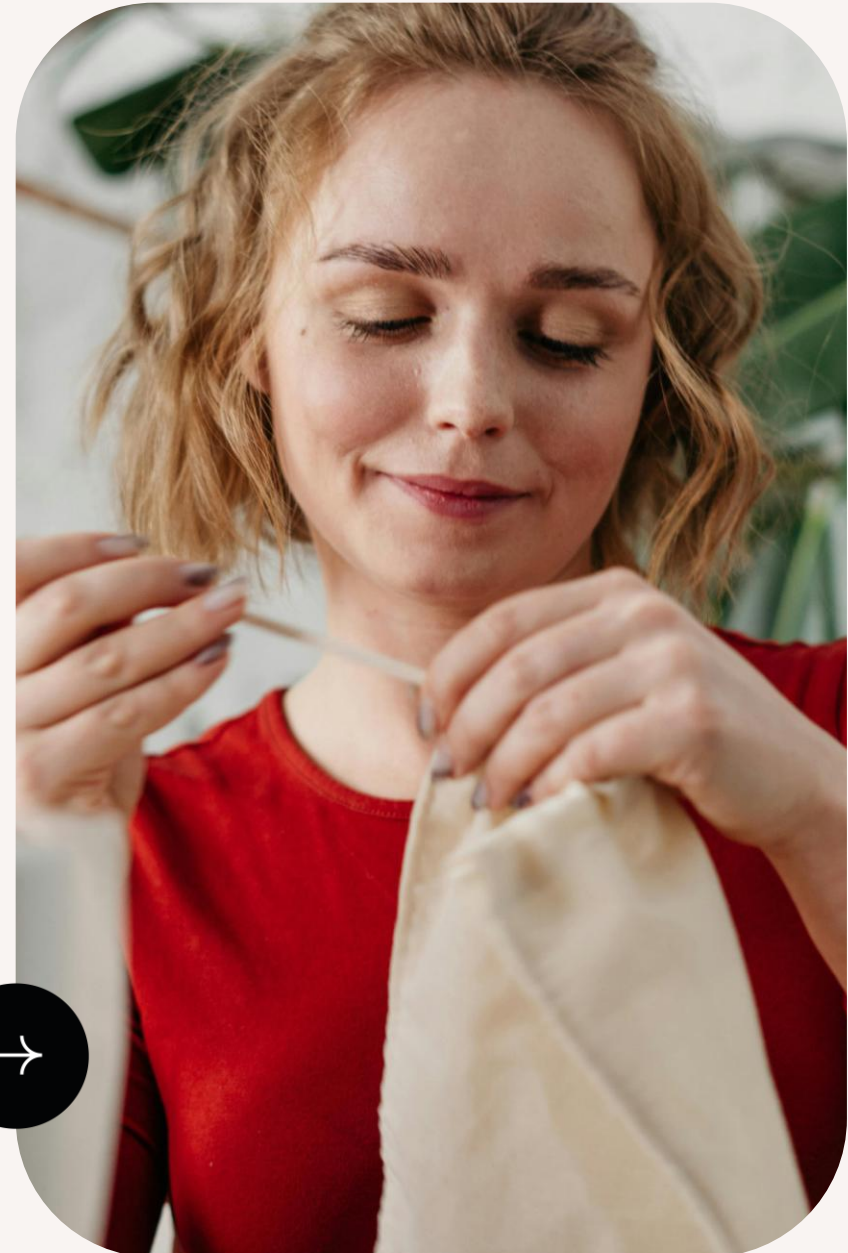
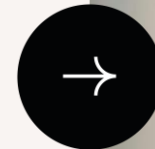
# The current situation of second-hand in 2023 in France

## 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

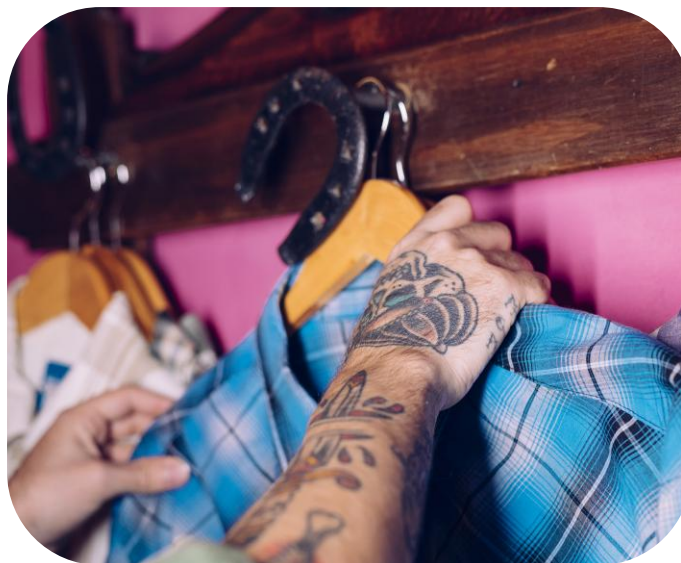


# Big picture



**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

More than

**1/3**

of French people

bought one or more items of 2<sup>nd</sup> 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).

**31%**  
of second-hand  
buyers

try to substitute the new for the 2<sup>nd</sup> hand as much as possible.

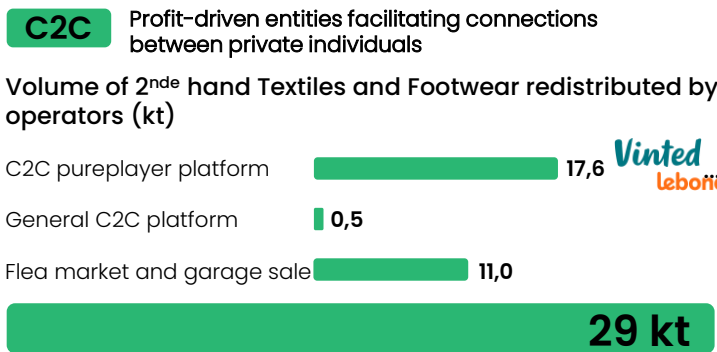
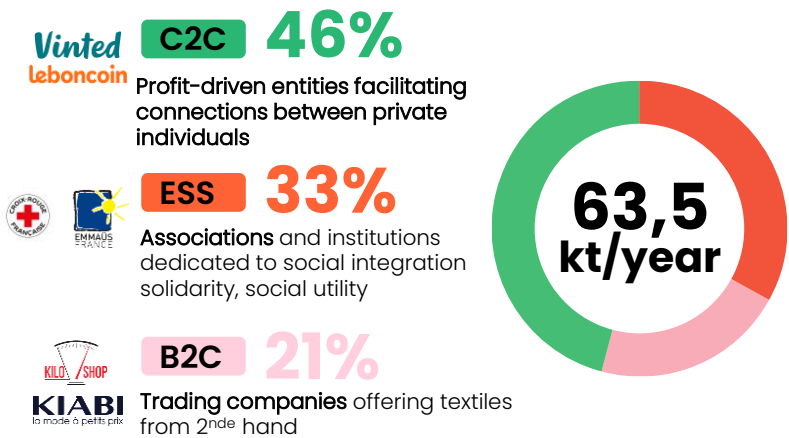


# State and evolution of the second-hand market in France in 2023:

## Key facts

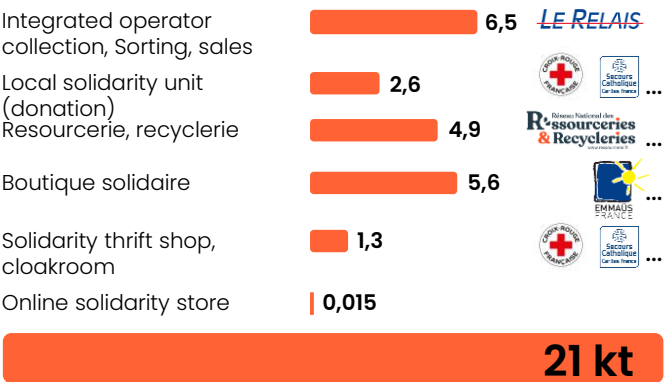
- In 15 years, digital platforms (C2C) have revolutionized the second-hand market, Vinted alone accounting for just over 1/4 of total volumes.

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



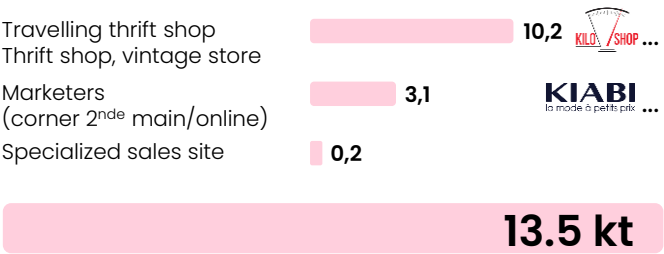
## ESS Associations and establishments dedicated to social integration, solidarity and social utility

### Volume of 2<sup>nd</sup>e hand Textiles and Footwear redistributed by actor (kt)



## B2C Companies offering textiles from 2<sup>nd</sup>e hand

### Volume of 2<sup>nd</sup>e hand Textiles and Footwear redistributed by actor (kt)



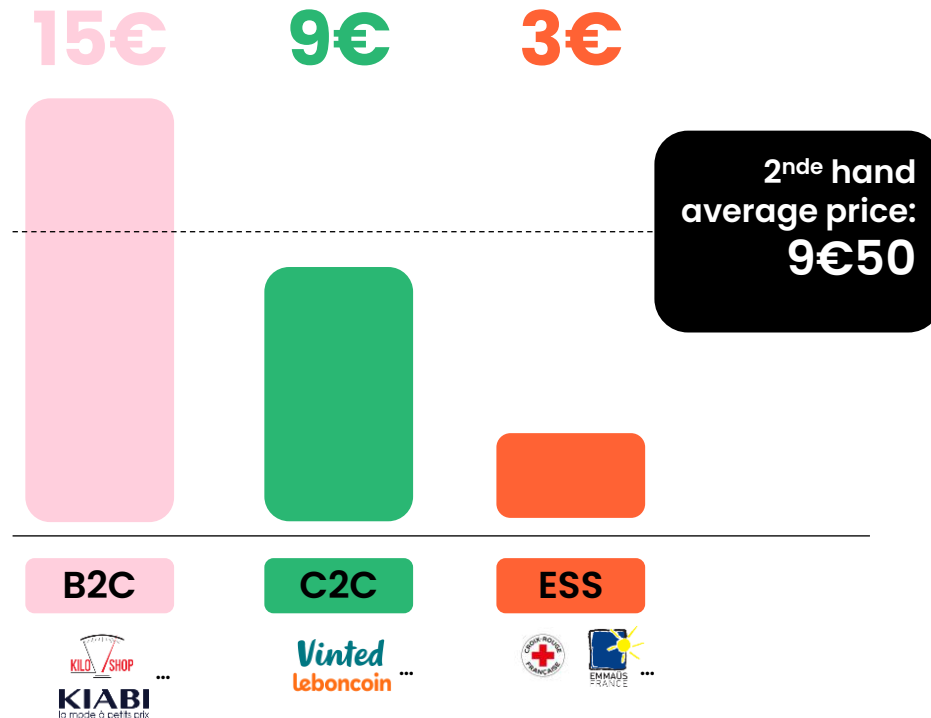
# Sales prices vary depending on market players



## 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 €)

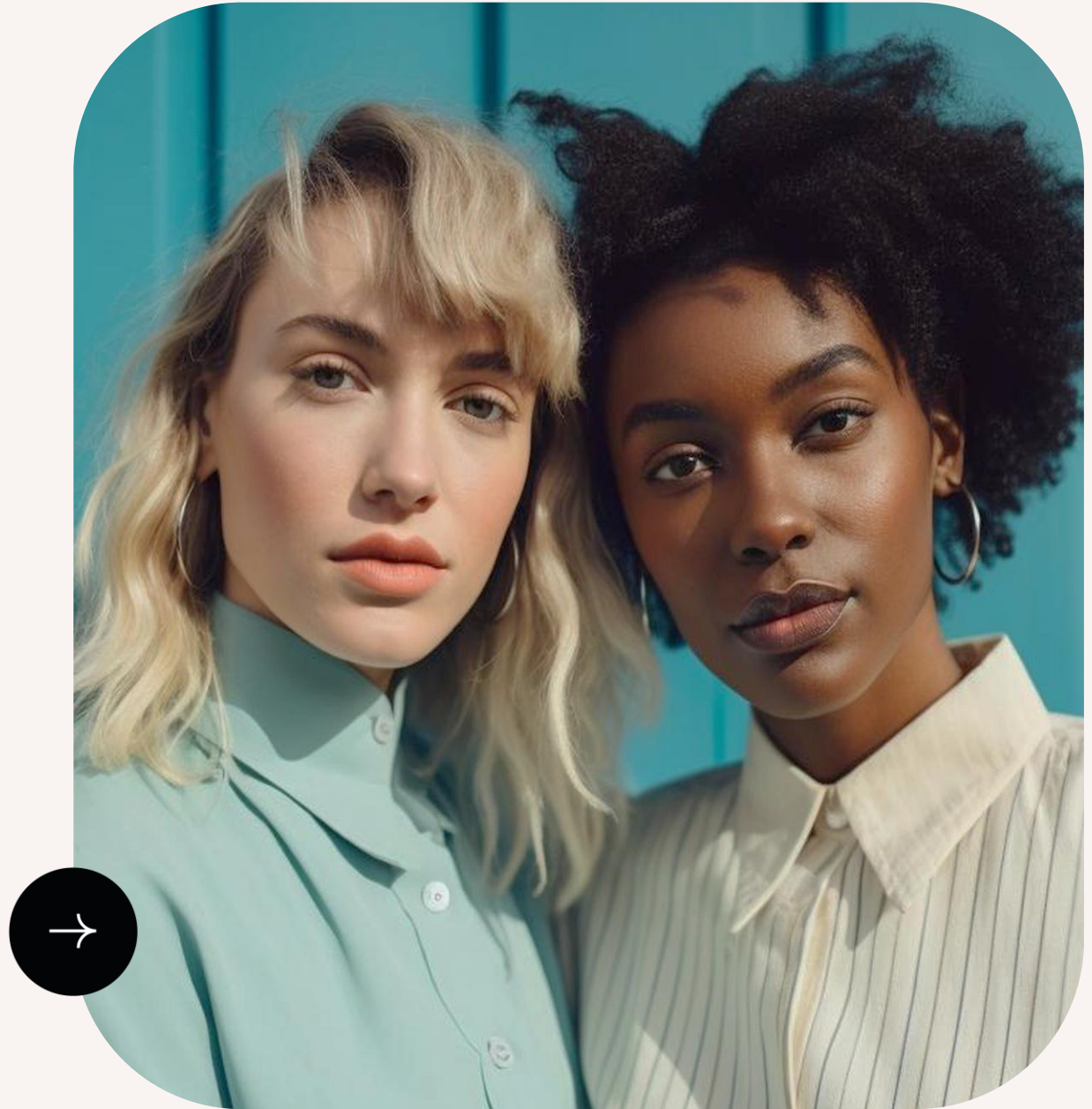


\*Average price of new item : 15€60

\*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 appetite for "very accessible 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 in 2023

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".**