Re_fashion

An overview of the French second-hand CHF market's practices and trends in 2023

Summary Report

Contents

Foreword

In this report we use a lot of market-related terminology. Detailed definitions can be found in the appendix:

CHF is used to designate the Clothing, Household linen and Footwear industry.

We have made the choice to mainly use **second-hand terminology** because this corresponds better to the scope studied within this project.

(Translator's note: the English translation for the French terms "réutilisation" and "réemploi" is "reuse". However, a distinction needs to be made between used clothing that is classified as waste or that is not classified as waste according to French regulations, as described below. The terms "reuse after waste status" and "reuse after collection" have thereby been used in this document for this purpose).

The terminologies **Reuse after waste status** *(any operation in which substances, materials or products that are classed as waste are used again for the same purpose. This follows sorting operations)* and **Reuse after collection** *(a concept that is close to "reuse" but slightly differs because it describes products that have not been classed as waste, e.g. sales between private individuals)* are terms used by the industry and will also be used, knowing that they automatically exclude certain actions (such as resale on platforms between private individuals, for example).

01.

Methodology

A 2-part methodological approach

PART 1	PART 2
Overview of the second-hand goods market	**Quantitative study of the French population and the second-hand goods market**

PART 1 – Overview of the second-hand goods market

1. **Description of stakeholders** involved in reuse after collection/reuse after waste status and in second-hand CHF
2. **Quantification of the weight of these stakeholders** (offer, sources).
3. **Analysis and categorisation** of these stakeholders according to their structure, their business model.
4. **Description of the challenges** and the development **opportunities** identified

Argon&Co

PART 2 – Quantitative study of the French population and the second-hand goods market

1. Evaluation of the **weight and the structure per** second-hand goods consumption **channel**
2. **Description of second-hand purchasing behaviour**
3. **Quantification of obstacles, motivation and levers** for purchasing second-hand goods overall and per channel.
4. Identification of the different **profiles** of second-hand **buyers** and **non-buyers**

June MARKETING

Analysis of supply and demand

Barriers and levers to be addressed to support market development

A hybrid approach was used to conduct the overview of stakeholders

1 **Literature review & market panel data**

KANTAR

2 **Constitution of a stakeholder directory**

- +15,000 physical distribution points
- 250 organisations, online and in networks

3 **A survey of 100 distribution points**

- Local solidarity associations
- Second-hand outlets
- Charity shops
- Nearly-new shops
- Second-hand clothing shops

4 **20+ interviews with organisations reusing clothing after collection/reusing clothing after waste status**

SSE* organisations: Le Relais, Ding Fring, Label Emmaüs, Eco Impact, Réseau National des Ressourceries & Recycleries, Emmaüs France, Croix-Rouge française, Recyclerie Solidaire, AIE Acise Insertion Environnement, Réseau Tissons la solidarité, Secours Catholique Caritas France

Marketers: promod, ZARA, Veepee, BIS Boutique Solidaire, KIABI la mode à petits prix, IKKS, La Redoute, Auchan, Decathlon, Vinted

B2B solutions: La Malle aux Trésors, CrushON, FAUME

Kantar Worldpanel Fashion – 2023 Annual Data

(*) SSE: Social and Solidarity Economy

A consumer survey of 2,400 people in France aged 16 and over

1

Target and collection method

- An online survey carried out in October 2024
- Sent to a sample of 2,400 people >16 years old, buyers and non-buyers of second-hand CHF

2

Locally, in 2 waves

- **A first wave of 1,500 national surveys representative** of socio-demographic quotas in terms of gender, age, region, socio-professional category, marital status so as to obtain a natural percentage of CHF buyers and non-second-hand buyers within the last 12 months
- **A second wave focused on second-hand CHF buyers** (N=1000, quotas taken from the first wave)

Total second-hand CHF buyers	Non-second-hand CHF buyers	TOTAL
N=1,679	N=716	N=2,395

02.

The second-hand CHF market in France (part 1)

02. a.

The stakeholders involved in the market

Who are the stakeholders in the second-hand CHF market in France?

SSE
Associations and organisations focused on social integration, solidarity, and social cohesion

Nb	Type of stakeholder	*Examples*
1	**Integrated collection, sorting and sales operator under contract with Refashion**	*Le Relais + Ding Fring, AGIR, GRS, ACISE*
2	**Local solidarity association (Donations)**	*Secours Catholique, Croix-Rouge française*
3	**Second-hand/recycling outlet**	*La petite roquette*
4	**Charity shop**	*Boutique Emmaüs*
5	**Second-hand clothing charity shop/outlet**	*Chez Henry (CRf), Tissons la solidarité*
6	**Online charity shop**	*Label Emmaüs*

B2C
Commercial companies selling second-hand clothing

Nb	Type of stakeholder	*Examples*
11	**Mobile second-hand clothing shop**	*Market seller*
12	**Second-hand clothing shop, vintage* shop**	*Kilo shop, Guerrisol, Free'p'Star*
13	**Marketer (second-hand corner / multi-channel)**	
14	**Specialised selling platform, marketer**	*Zalando, Smala, CrushOn*

Some second-hand clothing shop networks belong to "B2B" collection-sorting operators. Their model is close to that of integrated operators in the SSE but the tonnages sorted in sorting centres are also sold to commercial second-hand clothing shops in France but external to their own network.

C2C
Commercial organisations providing platforms to connect private individuals

Nb	Type of stakeholder	*Examples*
7	**C2C platform, pure player**	*Vinted, Vestiaire collective*
8	**Generalist C2C platform**	*leboncoin, FB marketplace, Ebay*
9	**Garage/jumble sale, flea market**	*Vide dressing*
10	**Nearly-new shop, sales desk**	*Chine machine*

B2B
Commercial companies selling second-hand clothing to trade or offering a management service.

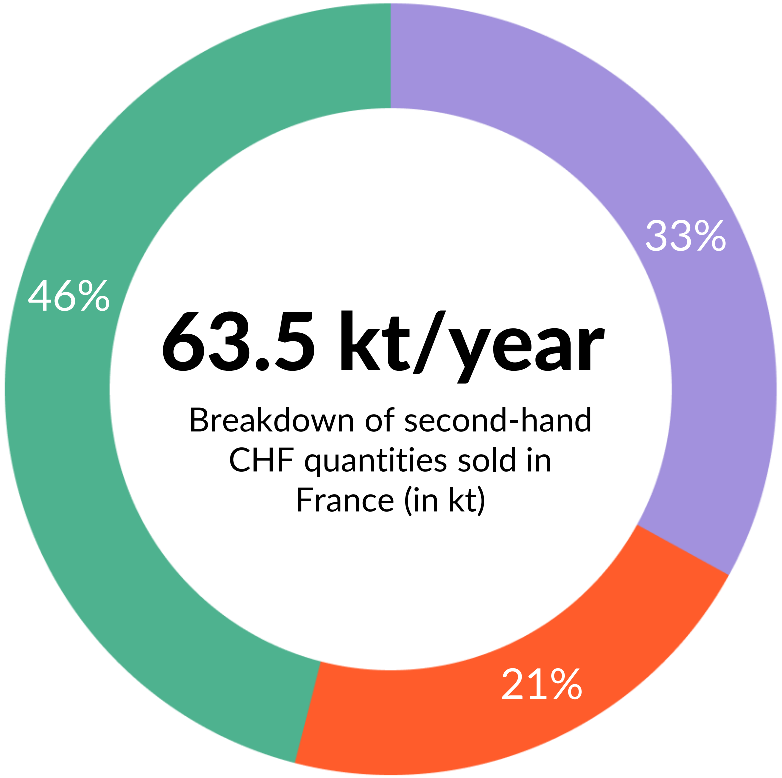
A	**Technological solution**	*Faume, CrushOn, La malle aux trésors, Prêt à changer, Paradigm*
B	**Collection operator & sorting centre**	*Gebetex, KFB, Philtex, Le Relais*
C	**Dealer, wholesaler, trader**	*Eureka fripe*

These are not included in the organisations offering second-hand CHF to the public. To avoid any risk of errors and double counting, they will be excluded from certain analyses.

PART 1

In terms of quantities, C2C is dominant

Of the 833 kt of new items placed on the market in 2023, second-hand represents **7,1% of the volumes.**



C2C Commercial organisations providing platforms to connect private individuals

SSE Associations and organisations focused on social integration, solidarity, and social cohesion

B2C Commercial companies selling second-hand clothing

Data Reliability Index

High, estimation from tracked and audited data

Medium, estimation based on reliable and reputable sources, good data completeness

Low, estimation based on available data (partial and controversial data)

(1) Refashion 2023 (Activity Report)
See the appendix for detailed estimation methodology

PART 1

Vinted alone represents just over 1/4 of this quantity

Data Reliability Index

- **High,** estimation from tracked and audited data
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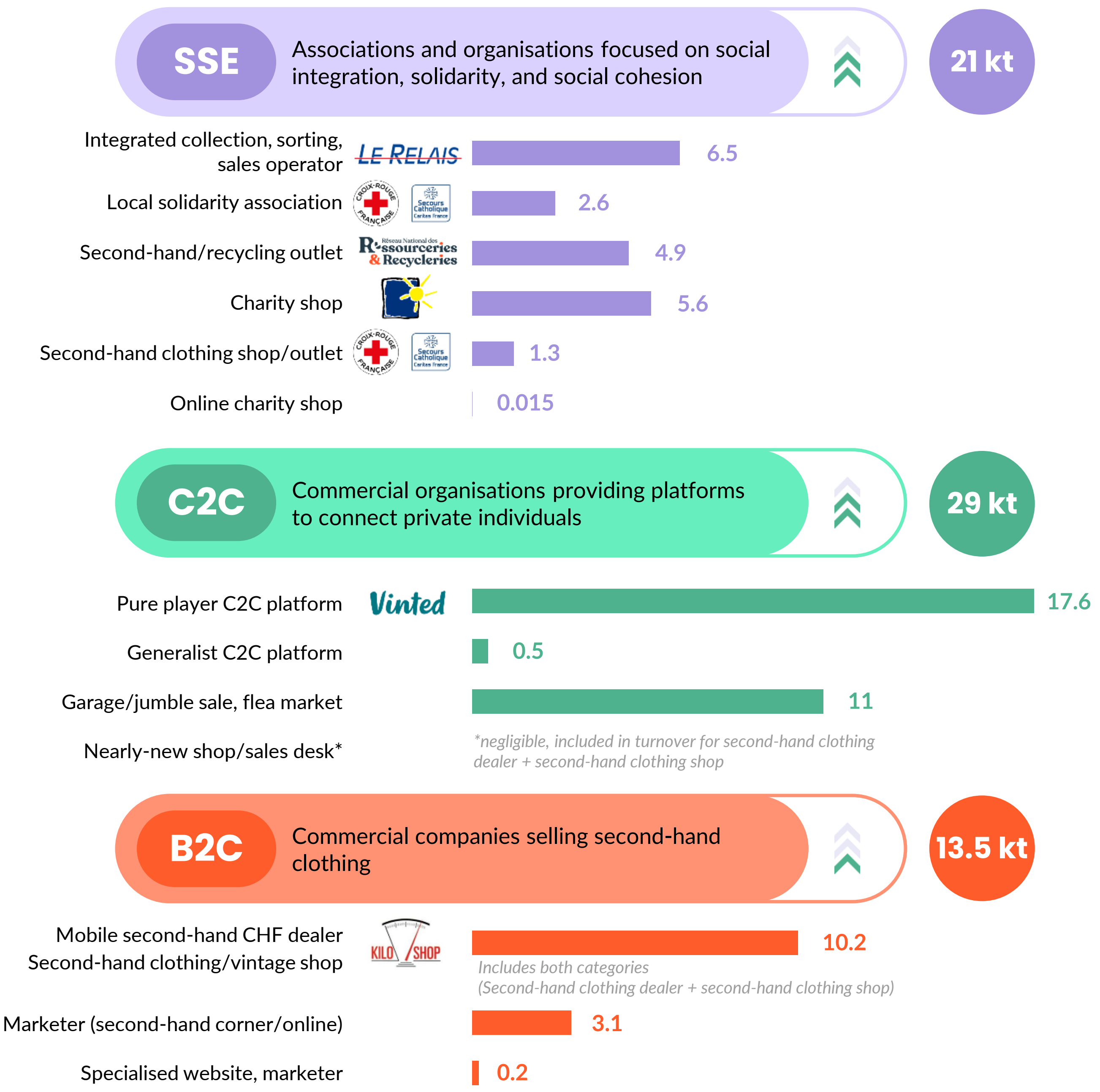
See the appendix for detailed estimation methodology

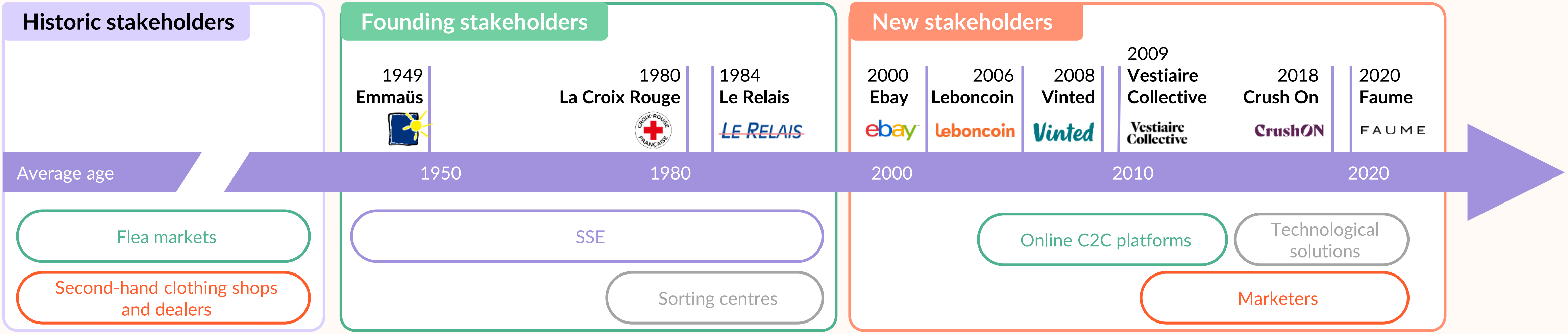
Quantity of second-hand CHF resold by stakeholder (kt)



PART 1

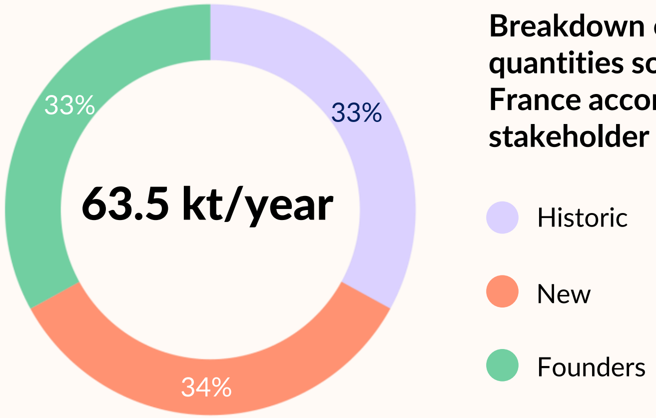
Over the last 15 years new stakeholders have taken a significant share of the market

Timeline of the emergence of second-hand CHF players in France



In the past 15 years, digital platforms (C2C and B2C) have turned the market upside down **and these new stakeholders now command 34% of quantities.**

While globally the market's growth is by no means negligible (+9.1%[2] in quantity in 2023 and 8.3%[2] in 2024).



Breakdown of second-hand CHF quantities sold or donated in France according to how long the stakeholder has been in business

Source: see « Estimation of streams » in this study
[2] *Source: Kantar Worldpanel Fashion, 2023 and 2024 annual data*

02. b.

Sources and streams

Let's take a look again at the stakeholders:

There are 3 very different ecosystems co-existing today on the market

SSE

They collect used CHF from the public and play an important role in **waste management.**
Their vocation is **social inclusion** through economic activity, using the revenue generated for social welfare.

Once collected, and depending on the context, these streams are premium-grade sorted and/or sorted.

The "premium-grade" items are sold in charity shops on the French market and the rest of the reusable CHF goes mainly to international dealers, with very little going to the French B2C market.

C2C

C2C generally relies on individuals themselves uploading the items for sale online (digitally) or selling them in person (physically).

In the case of online sales, the platform manages and moderates the contact between private individuals.
It earns its revenue through advertising, sales or on a service provided (pro).

Despite the existence of high traceability, **it is difficult to estimate the streams that migrate through the platforms to date**

B2C

B2C supply relies on the precise specifications by collection-sorting operators or international traders to fill their stockpiles.
These streams have often undergone quality control.

Some organisations carry out selective collection (condition, category, brand, etc.) when collecting from the public in return for payment.

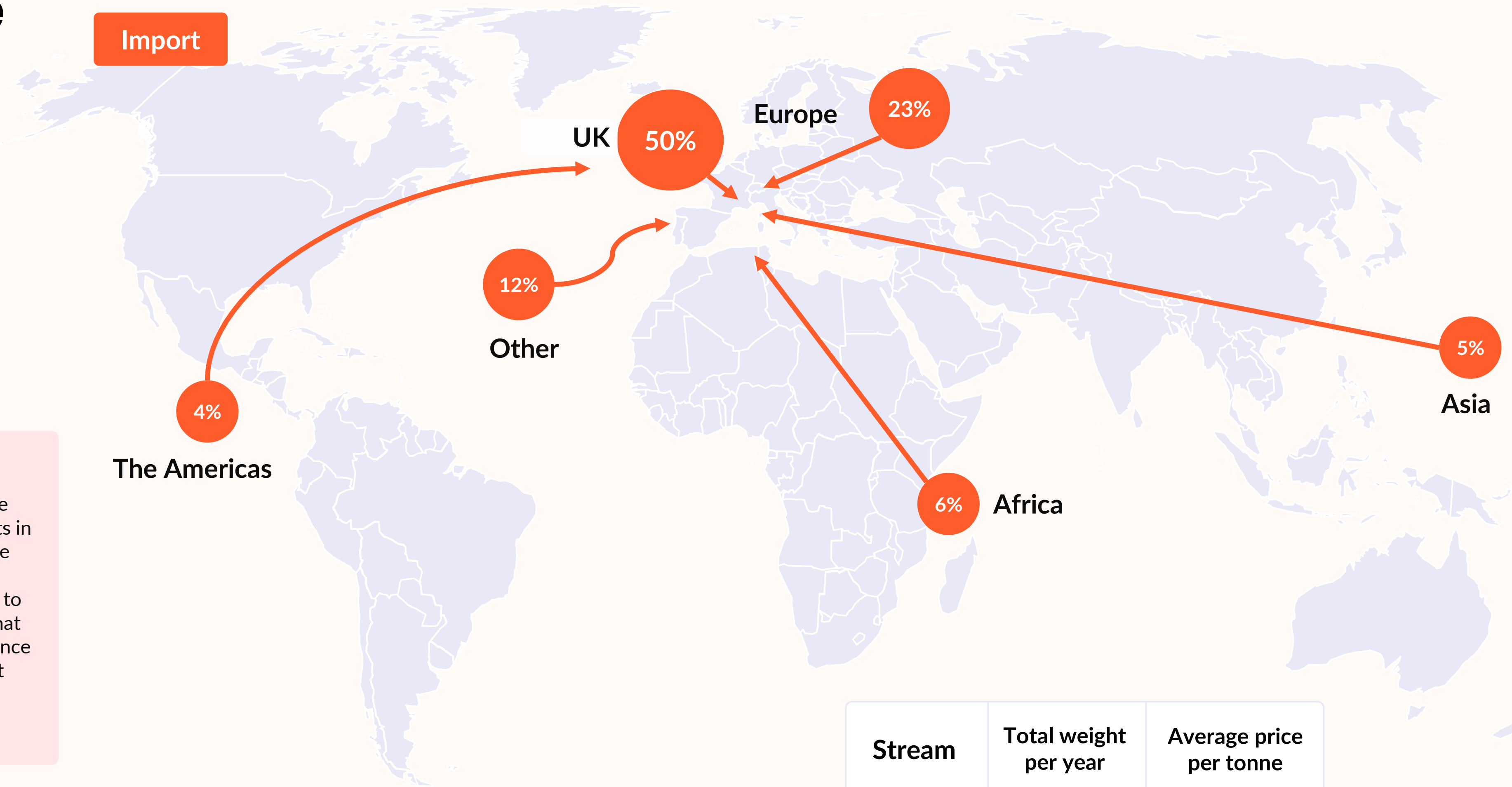
For the sake of simplicity, some parts of the value chain are sometimes subcontracted to technology solution providers who offer a "turnkey "service.

Source: interviews with organisations and experts

B2C: a model that relies on the importation of “premium-grade” bales finely sorted, mainly coming from Europe

The imported bales contain a selection of high-quality items offering a **strong potential for value enhancement in France.**

(*) Figures are indicative only, the tonnages imported into France may be sold in all second-hand clothing outlets in the Shengen Area, whilst inversely, the tonnages imported in this area can be sold in France without being declared to customs. Here, we have considered that the tonnages entering and leaving France are equivalent. It should be noted that the figures are most likely underestimated.



Stream	Total weight per year	Average price per tonne
Import*	12.3 kt	1995 €

Source: French Customs' statistics (Website) - data extracted on 11/06/2024, code 6309 (Second-hand clothing)

A weakened model under pressure for all stakeholders

SSE / Others

The donation model is being challenged and there is a lack of outlets on the international second-hand market

- The quality of collection is adversely affected due to the monetization of the private individual's wardrobe: valuable items are stored away in the hope of selling them, which is challenging the donation model.
- Since 2023, the massive influx of quantities from Asia has intensified competition on the international second-hand clothing market, jeopardizing the collection-sorting operators in France who are struggling.

C2C

Potentially reusable items that are dormant

- Retention of items, in particularly valuable ones: items stay stored on platforms and in wardrobes, limiting their circulation and their recovery.
- A new model hindering the SSE organisations' model which is seeing a part of its sources being redirected to other channels, accelerating the reduction in the quantities collected.

B2C

French sources difficult to access preventing the development of second-hand in shops

- Difficulties in accessing a defined source prevent a sufficient offering of qualitative and quantitative second-hand clothing. This prevents these organisations from asserting themselves as a true substitute to new clothing and in finding a viable business model.
- A new in-shop, incentive-based collection approach is developing thereby offering the public the possibility to receive payment for its collection, which is accelerating the decline of the donation model.

Currently the market's supply chain appears to be a major obstacle in its development. The development of local outlets seems essential in the mid-term in order to shield oneself from the impacts of the global market.

Source: Results of Argon mission - interviews of organisations and experts

02. c.

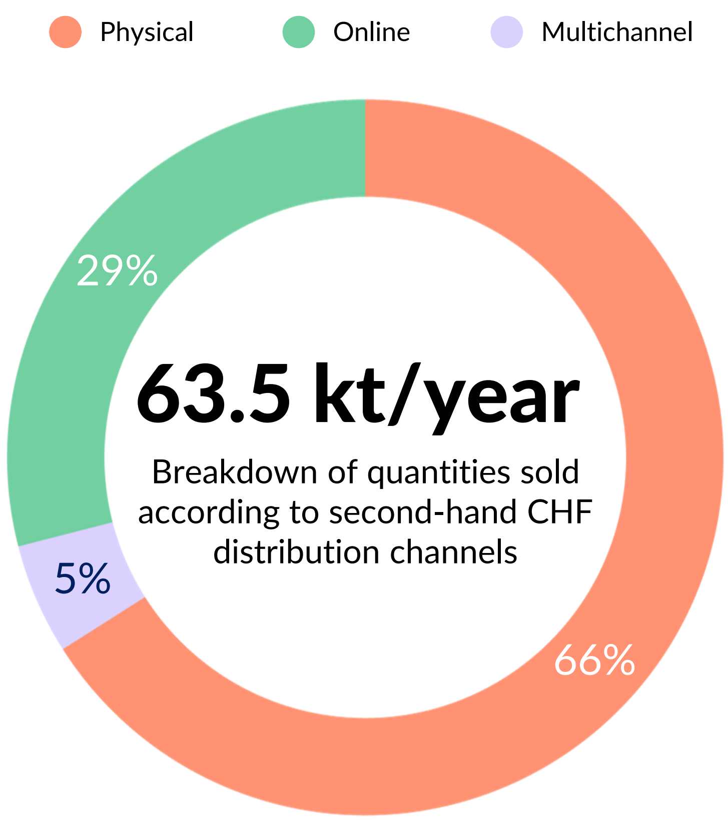
Distribution channels

PART 1

With the arrival of C2C platforms, E-commerce now plays a significant role

In comparison to new clothing: E-commerce accounts for 21.7%[2] of the 2023 new clothing fashion market's turnover and 16.7%[2] in terms of quantity (CAD, July 2023)

The second-hand market, contrary to the new clothing market, is only marginally multi-channel, which is easily explained by the market's silo-mode of operating and the fact that items are one-offs.



SSE

1 Integrated collection, sorting and sales operator
2 Local solidarity association (donations)
3 Second-hand/recycling outlet
4 Charity shop
5 Second-hand clothing charity shop/outlet
6 Online charity shop

C2C

7 C2C platform, pure player
8 Generalist C2C Platform
9 Garage/jumble sale, flea market
10 Nearly-new shop, sales desk

B2C

11 Mobile second-hand clothing shop
12 Second-hand clothing shop, vintage shop
13 Marketer (second-hand corner / multi-channel)
14 Specialised selling platform, marketer

Source: see ""Estimation of streams" in this study,
[2]Kantar Worldpanel Fashion January-July 2023 (CAD)

PART 1

With 33% of the quantities, the SSE only harnesses 12% of the value

The C2C channels represent **the largest percentage of the market** in terms of quantity (45%) and value (49%).

Data Reliability Index

- **High,** estimation from tracked and audited data
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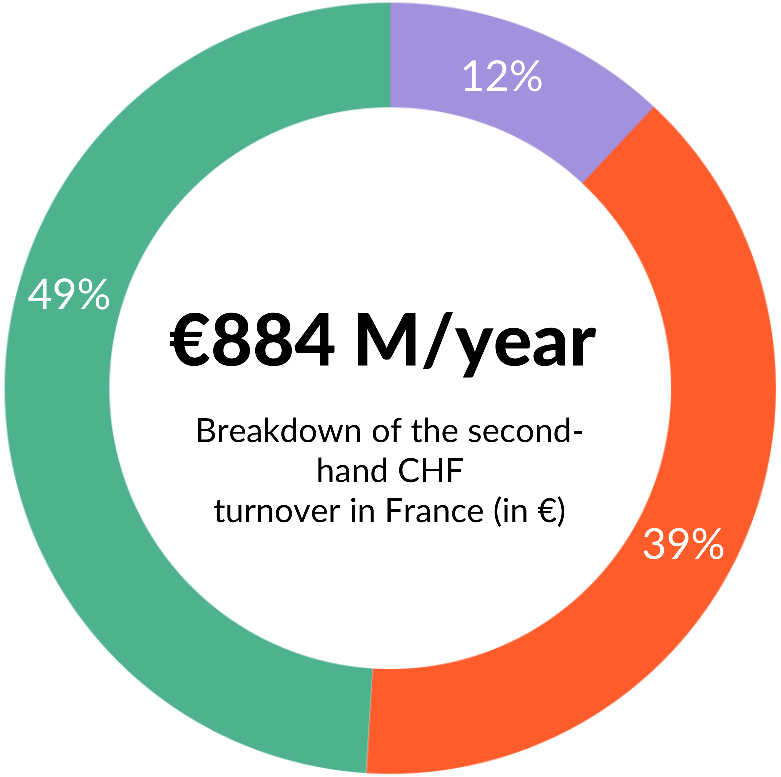
- **Low,** estimation based on available data (partial and controversial data)

Sources and methodology of estimation detailed in the appendix



C2C Commercial organisations providing platforms to connect private individuals

SSE Associations and organisations focused on social integration, solidarity, and social cohesion

B2C Commercial companies selling second-hand clothing

03.

Second-hand CHF consumption in France (Part 2)

The consumption of second-hand CHF in France

Main figures**

Who ?

36% households with children *(index 129)*

34% SPC- *(index 110)*

14% new buyers

60% of women *(index 115)*

SECOND-HAND CHF BUYERS

38% of the French population

How ?

42% buy more in quantity

31% replace new by second-hand

11% buy exclusively second-hand (4% of the French population)

75% of purchases are not planned

Why ?

57% to manage my budget

44% to treat myself without spending much

43% to prevent waste

8.1/10 appeal of second-hand items

Where ? **4** channels visited per year

C2C	88%
Clearance sales/flea markets	64%
Nearly-new shops	61%
SSE	51%
Weekly markets	43%
Marketer physical sites	35%
Online B2C	31%
Marketers online sites	30%

C2C

7.2 visits with a purchase

8.1/10 rating

52% incentive for 1st purchase

What ?

83% clothing

7.3 items of clothing per year/per buyer

10% of the biggest buyers bought 16.4 items

But...

25% lack of hygiene

54% with an unsatisfactory buyer experience

NON-BUYERS WHO INTEND TO BUY

19% of the French population

*** Results from the June Marketing study*

PART 2

Overview of channel strengths and weaknesses

Perception & image of second-hand channels

	Key criteria	Trust in the channel	Allows a good deed to be done	Presentation/ customer experience	Range of styles	Brand names at lower prices	Unique/rare items	Affordable prices
C2C	Resale websites between private individuals (Vinted, etc.)	☆	👍	👍	☆	☆	☆	👍
C2C	Clearance sales, flea markets and garage/jumble sales			👎	👎			👍
B2C	Second-hand clothing shops, specialised second-hand shops, nearly-new shops	👍	👍			👍	👍	👍
B2C	Physical brand name shops with a second-hand corner	👍		☆				
B2C	Brand websites with a second-hand corner			👍			👎	
B2C	Specialised websites in buying and selling top-of-the-range second-hand clothing (Vestiaire Collective, etc.)	👎	👎	👍				👎
SSE	Shops belonging to associations, charity shops, recycling outlets		☆	👎	👎	👎		☆

*** Results from the June Marketing study*

☆ The highest score of all channels

👍 Higher-than-average score

👎 The lowest score of all channels

REFASHION STUDY - AN OVERVIEW OF THE FRENCH SECOND-HAND CHF MARKET'S PRACTICES AND TRENDS IN 2023- JUNE 2025

04.

Conclusions

A shift in the model:

From a social impact–focused activity to a market economy

An upward dynamic

- Strong and increasing demand for second-hand textiles
- Still a marginal share: 7.1% of volumes sold

Structural barriers

- Lack of coordination among key stakeholders
- Partial substitution for new items (31%)
- Rebound effect fueling overconsumption

Three key challenges to address

1. Establish a well-structured industrial reuse sector
2. Offer a customer experience equivalent to that of buying new
3. Foster synergies between existing models, without forcing conformity

Re_fashion

Changeons notre mo(n)de, durablement.