

JUNE 2025

Re_fashion

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

Summary Report



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- a. The stakeholders involved in the market
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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).



A low-angle photograph of three models against a bright blue sky with wispy clouds. In the foreground, a Black woman with short curly hair wears a vibrant magenta high-collared shirt. Behind her, a woman with long, wavy brown hair wears a white high-collared shirt. To the right, a third person with short dark hair wears a blue high-collared shirt. The models are looking in different directions, creating a sense of movement and style.

01. Methodology

A 2-part methodological approach

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



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**



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
- ▶ Charity shops
- ▶ Nearly-new shops
- ▶ Second-hand outlets
- ▶ Second-hand clothing shops

4

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

SSE* organisations



Marketers



B2B solutions



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

Target and collection method

1

- ▶ 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

Locally, in 2 waves

2

- ▶ 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

N=1,679

Non-second-hand CHF buyers

N=716

TOTAL

N=2,395

A low-angle photograph of three models against a bright blue sky with wispy clouds. In the foreground, a Black woman with a large afro is wearing a vibrant pink, high-collared, ribbed shirt and looking upwards. Behind her to the left, a woman with long, wavy brown hair is wearing a white, high-collared, ribbed shirt and looking slightly to the side. To the right, a third person with short dark hair is wearing a blue, high-collared, ribbed shirt and looking towards the left. The lighting is bright and natural, creating a high-contrast, fashion-forward aesthetic.

02.

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

A low-angle photograph of three models against a bright blue sky with wispy clouds. In the foreground, a Black woman with short curly hair wears a vibrant magenta high-collared shirt. Behind her to the left, a woman with long wavy brown hair wears a white high-collared shirt. To the right, a person with short dark hair wears a blue high-collared shirt. The lighting is bright and natural, creating a high-contrast, airy feel.

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

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.

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.

Data Reliability Index



High, estimation from tracked and audited data

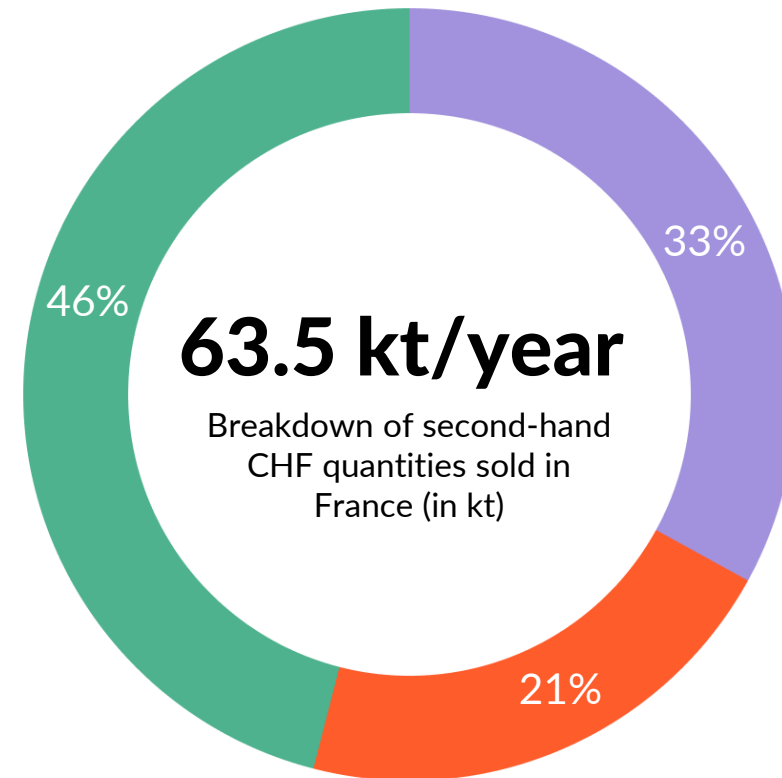


Medium, estimation based on reliable and reputable sources, good data completeness



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

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



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



Vinted alone represents just over 1/4 of this quantity

Data Reliability Index



High, estimation from tracked and audited data



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



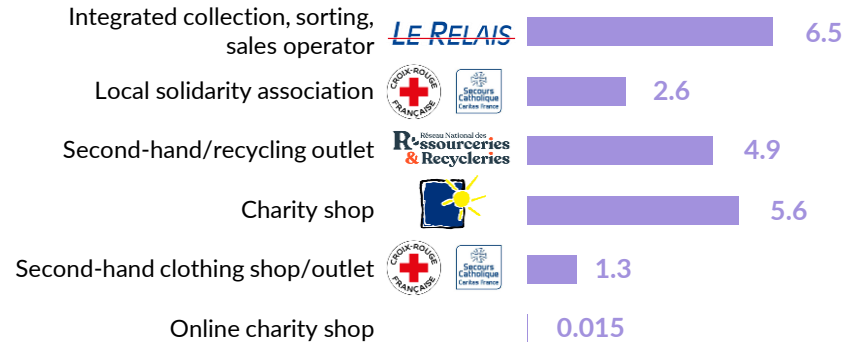
Low, estimation based on available data (partial and controversial data)

See the appendix for detailed estimation methodology

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

SSE

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


21 kt

C2C

Commercial organisations providing platforms to connect private individuals


29 kt

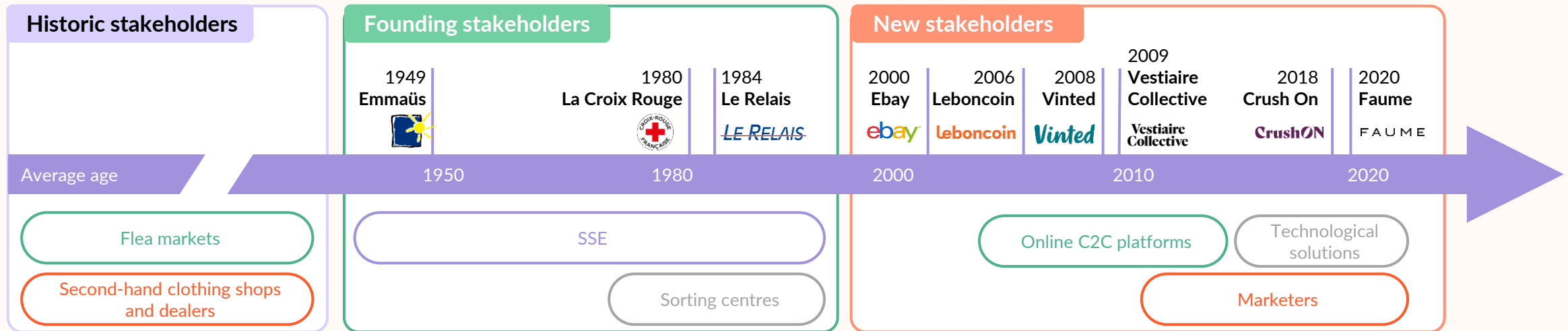
B2C

Commercial companies selling second-hand clothing


13.5 kt

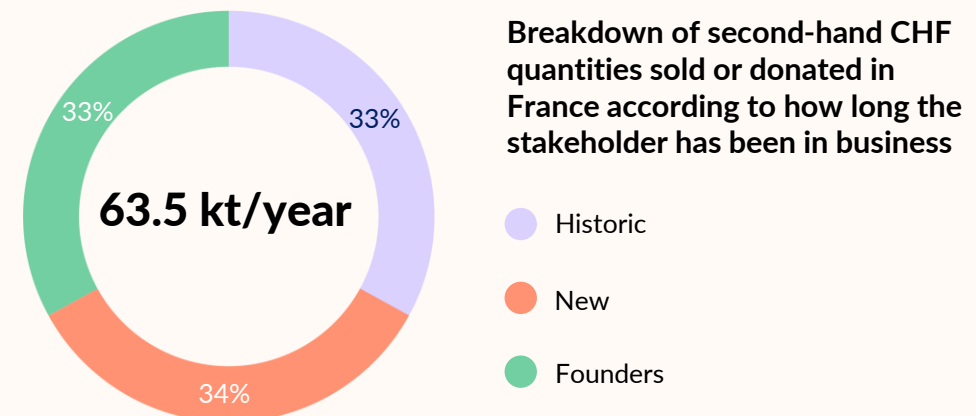

Over the last 15 years new stakeholders have taken a significant share of the market

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).



Source: see « Estimation of streams » in this study

² Source: Kantar Worldpanel Fashion, 2023 and 2024 annual data

A low-angle photograph of three models against a bright blue sky with wispy clouds. The model in the foreground is a Black woman with short, curly hair, wearing a vibrant magenta high-collared, pleated dress. Behind her to the left is a woman with long, wavy brown hair wearing a white high-collared, pleated dress. To the right, partially visible, is a person with short dark hair wearing a blue high-collared, pleated dress. The lighting is bright and natural, creating a high-contrast, ethereal atmosphere.

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.

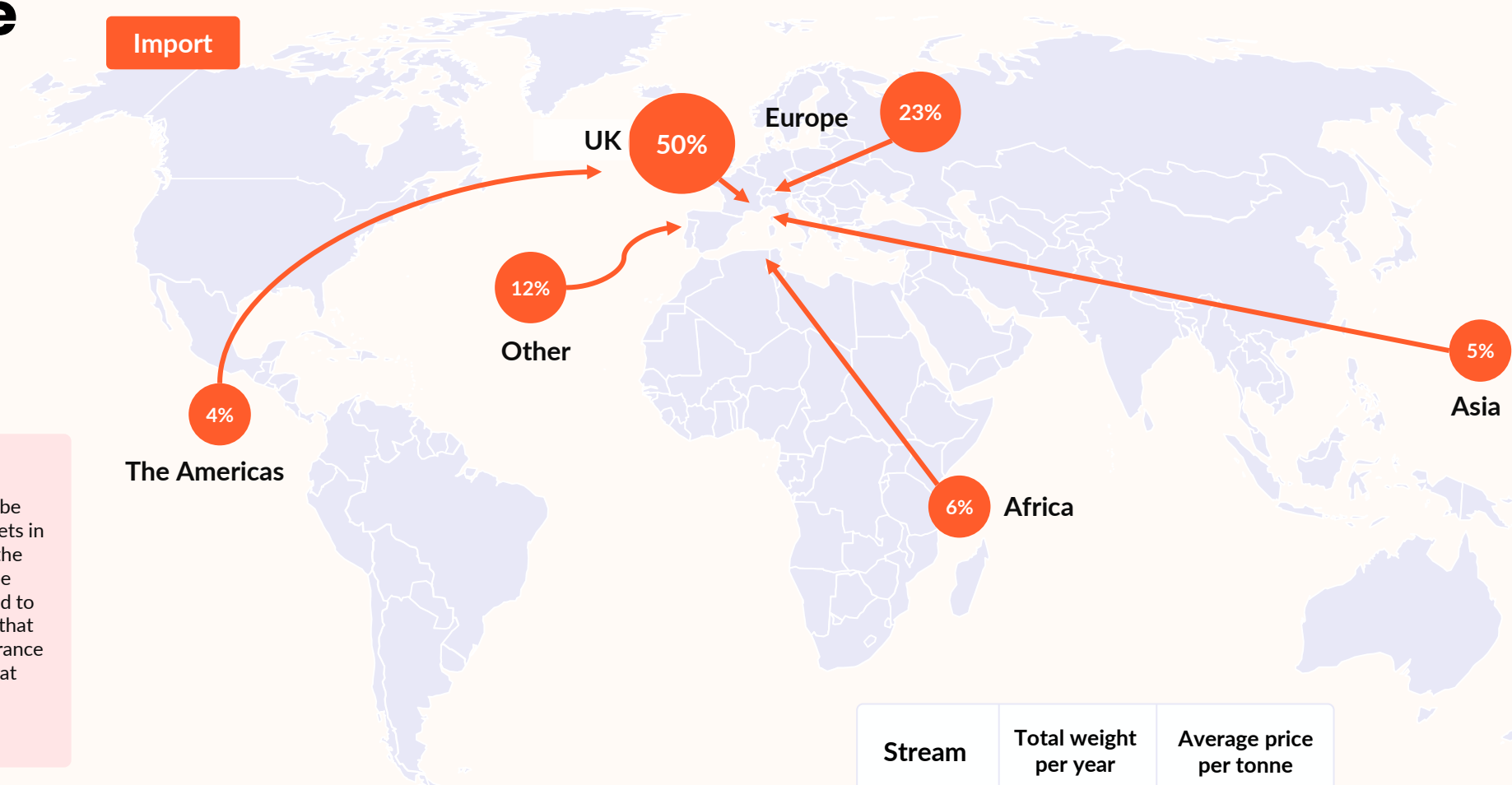
For the sake of simplicity, some parts of the value chain are sometimes subcontracted to technology solution providers who offer a “turnkey” service.



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 €

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.

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02. c.

Distribution channels

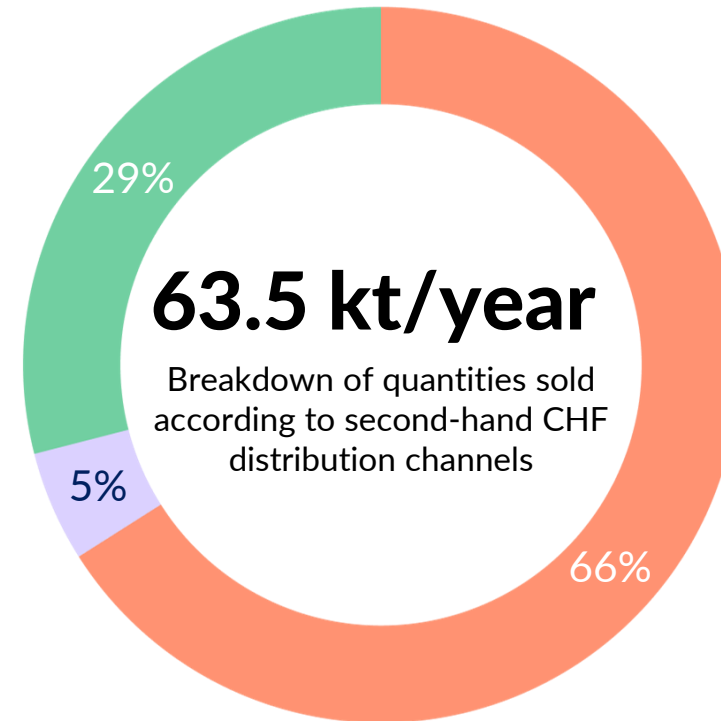
With the arrival of C2C platforms, E-commerce now plays a significant role

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.

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

Physical Online Multichannel



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

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



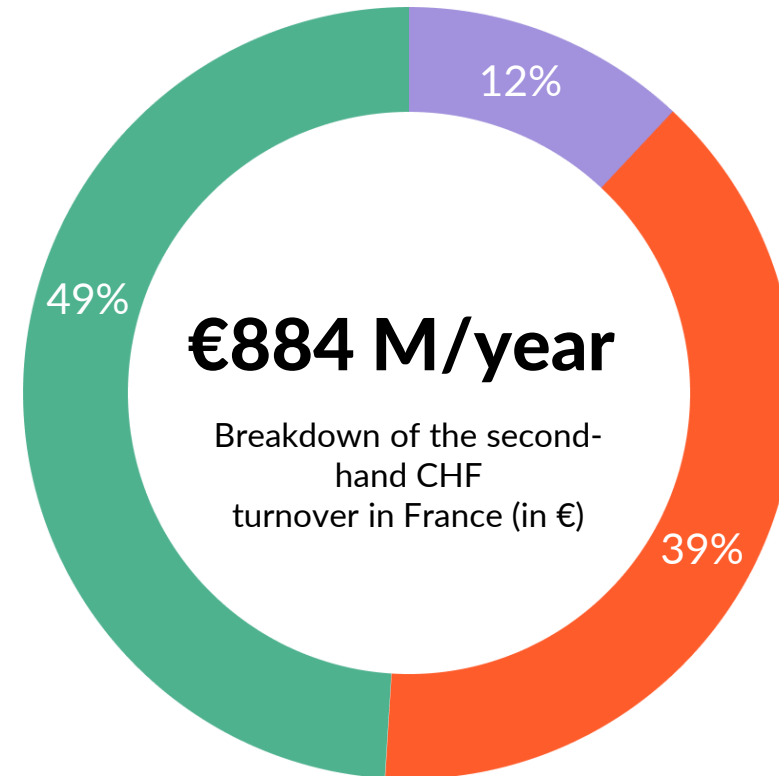
High, estimation from tracked and audited data



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



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



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

A man with a beard and glasses, wearing a blue bucket hat and a striped shirt, is smiling and looking at a blue garment in a clothing store. The background shows racks of clothes.

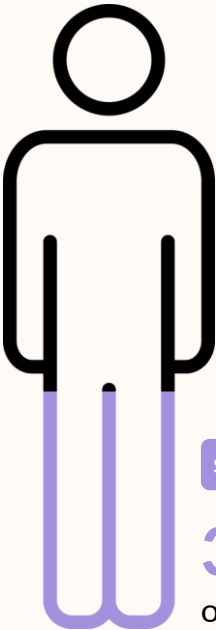
03. **Second-hand CHF consumption in France (Part 2)**

The consumption of second-hand CHF in France

Main figures**

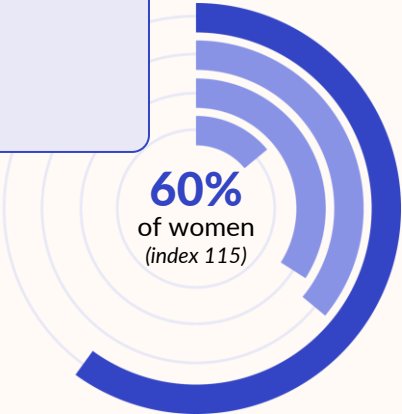


REFASHION STUDY - AN OVERVIEW OF THE FRENCH SECOND-HAND CHF MARKET'S PRACTICES AND TRENDS IN 2023 - JUNE 2025



Who ?

- 36% households with children (index 129)
- 34% SPC- (index 110)
- 14% new buyers

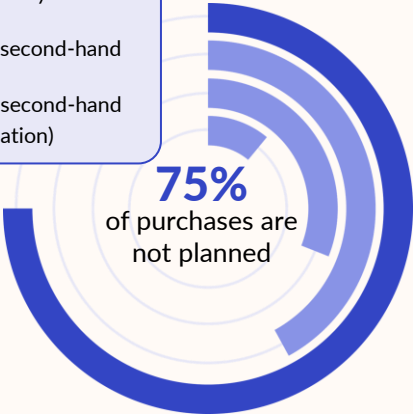


SECOND-HAND CHF BUYERS

38% of the French population

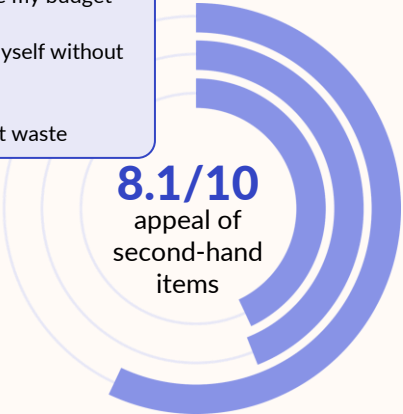
How ?

- 42% buy more in quantity
- 31% replace new by second-hand
- 11% buy exclusively second-hand (4% of the French population)



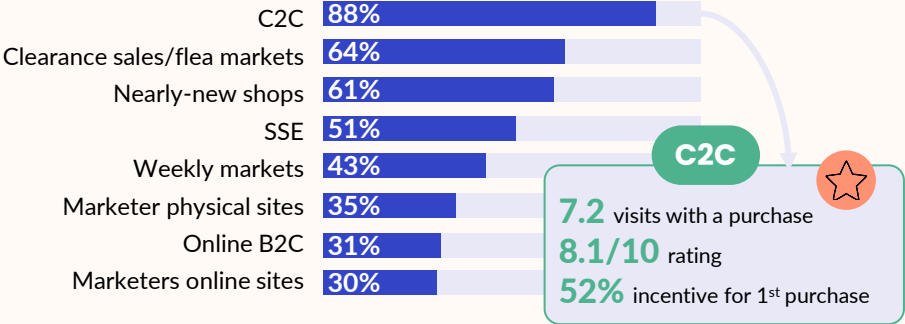
Why ?

- 57% to manage my budget
- 44% to treat myself without spending much
- 43% to prevent waste



Where ?

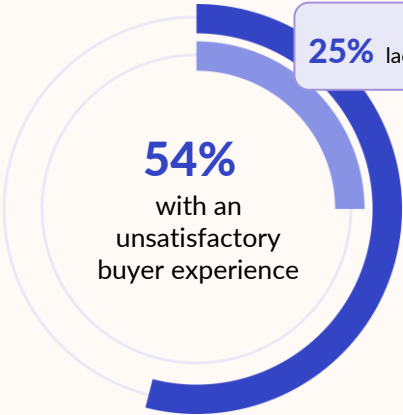
4 channels visited per year



What ?



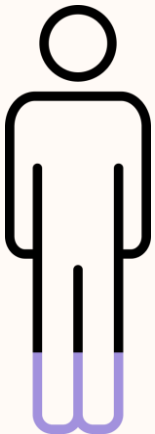
But...



25% lack of hygiene

NON-BUYERS WHO INTEND TO BUY

19% of the French population



** Results from the June Marketing study

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.)	☆	👍	👍	☆	☆	☆	👍
	Clearance sales, flea markets and garage/jumble sales			👎	👎			👍
B2C	Second-hand clothing shops, specialised second-hand shops, nearly-new shops	👍	👍			👍	👍	👍
	Physical brand name shops with a second-hand corner	👍		☆				
	Brand websites with a second-hand corner			👍			👎	
	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		☆	👎	👎	👎		☆

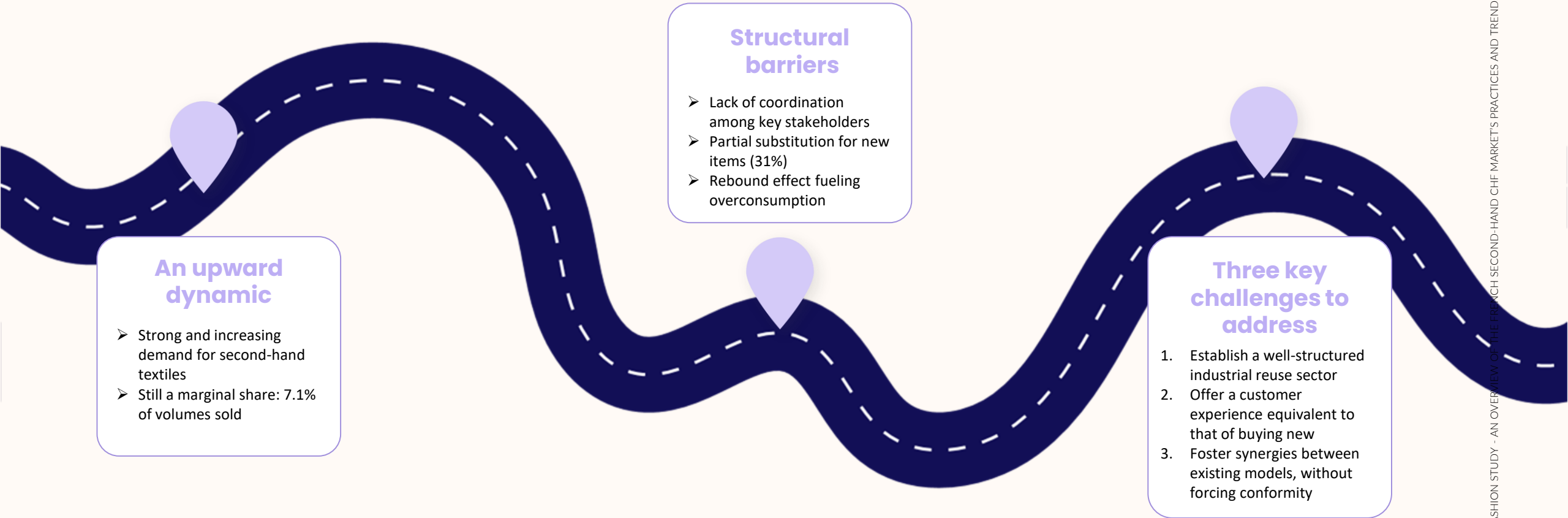


04.

Conclusions

A shift in the model:

From a social impact-focused activity to a market economy





Re_fashion

Changeons notre mo(n)de, durablement.