An overview of the French second-hand CHF market in 2025

Re_fashion

Summary report

SEPT. 2026

Contents

Preamble

This report uses terminology related to the sector, with definitions detailed in the appendix:

CHF will be used to refer to the **Clothing, Household linen and Footwear** industry.

We have chosen to use the term **second-hand** for the most part, as it best corresponds to the broad scope studied in this project.

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
REFASHION STUDY - AN OVERVIEW OF THE FRENCH SECOND-HAND CHF MARKET IN 2025 - SEPT 2026

A hybrid approach was used to conduct the overview of stakeholders

1 Literature review & market panel data

2 20+ interviews with second-hand CHF organisations

SSE organisations*

C2C

B2C

B2B

Worldpanel Fashion – Annual Data 2025

(*) SSE : Social and Solidarity Economy

02.

The second-hand CHF market in France in 2025

02. a.

Stakeholders

Second-hand stakeholders in France

	#	Stakeholder	Dominant purpose	Stream type
SSE	1	**Integrated collection, sorting and sales operators under contract with Refashion** - *Le Relais + Ding Fring, AGIR, GRS, ACISE*	Social inclusion	Monostream CHF
	2	**Local solidarity associations (donations) -** *Secours Catholique, Croix-Rouge française*	Charity	
	3	**Second-hand/recycling outlets -** *La petite roquette*	Reuse after collection	Multistream
	4	**Charity shops -** *Boutique Emmaüs*	Social impact	
	5	**Second-hand clothing charity shops -** *Tissons la solidarité*	Social inclusion	Monostream CHF
	6	**Online charity shops -** *Label Emmaüs*		Multiflux
C2C	7	**pure player C2C platforms -** *Vinted, Vestiaire collective*	Commercial	Monostream CHF
	8	**Generalist C2C platforms -** *leboncoin, FB marketplace, eBay*		Multistream
	9	**Garage/jumble sales, flea markets -** *Vide dressing*		
B2C	10	**Nearly-new shops, sales desks* -** *Chine machine, Bobby*		
	11	**Mobile second-hand clothing dealers -** *Market vendor*		Monostream CHF
	12	**Second-hand clothing shop, vintage shop -** *Kiloshop, Guerrisol, Free'p'Star*		
	13	**Marketer (second-hand corner/multi-channel) -** *Auchan, Kiabi, Decathlon, Promod*		Multistream
	14	**Specialised selling platforms, marketers -** *Zalando, Abracadabra*		

Dominant purpose

Social inclusion
- *Facilitate the social and professional integration of marginalized people*
- *Offer training, jobs and personalized assistance to help individuals to find an active and stable role in society*

Charity
- *Offer humanitarian aid and support people facing socio-economic insecurity*
- *Provide resources, services and moral support to the poorest (donations, voluntary work)*

Reuse after collection
- *Recover, repair, resell used objects*
- *Reduce waste, promote a circular economy*
- *Offer products at low prices and create local jobs*

Social impact
- *Transform donations into initiatives with a social impact (charity or social inclusion)*

Commercial
- *Generate profit by selling good or services related to second-hand clothing*

Flux

Monostream CHF
- *Only sell CHF*

Multistream
- *Sell all types of items (furniture, electronic equipment, books, accessories, etc.)*

*Nearly-new shops were categorized as B2C rather than C2C because their volumes are aggregated with those of thrift shops.

Three ecosystems with increasingly porous boundaries

SSE

SSE stakeholders distribute items from the collection of used CHF from citizens.

Their purpose is primarily social: promoting social inclusion through economic activity - collection, sorting and sale - and using revenue for **social and charitable actions.**

Some stakeholders are integrated, meaning they carry out collection, sorting and distribution. Solidarity-based reuse after waste status stakeholders collect and distribute only the "premium-grade" CHF, leaving finer sorting to specialised operators.

Marginally, some solidarity thrift shops source from sorters, moving closer to the sourcing logic of B2C stakeholders.

C2C

This ecosystem is divided into two main channels: physical (flea markets and garage sales) and **digital,** where citizens themselves list items for sale online.

For the digital channel, platforms such as Vinted and Leboncoin manage and moderate connections between citizens. They are remunerated through advertising, sales commissions or services rendered, such as authentication.

Some platforms are also beginning to open up to professionals.

B2C

B2C retailers have a commercial purpose. They source on the basis of precise specifications, calling on local collection-sorters or international traders to complete their stocks. These flows have often benefited from quality control or sometimes a reconditioning step.

Some stakeholders carry out selective collection (condition, category, brand, ...) from citizens in exchange for rewards.

For simplicity, some parts of the value chain are sometimes outsourced to technological solutions, in B2B, that offer a **"turnkey" service or a sourcing capacity based on precise specifications.**

02. b.

Volumes

In terms of volume, C2C and the SSE occupy a predominant position

C2C volumes **are very largely achieved on digital platforms** (32%) with the remaining 10% achieved through garage sales and flea markets.

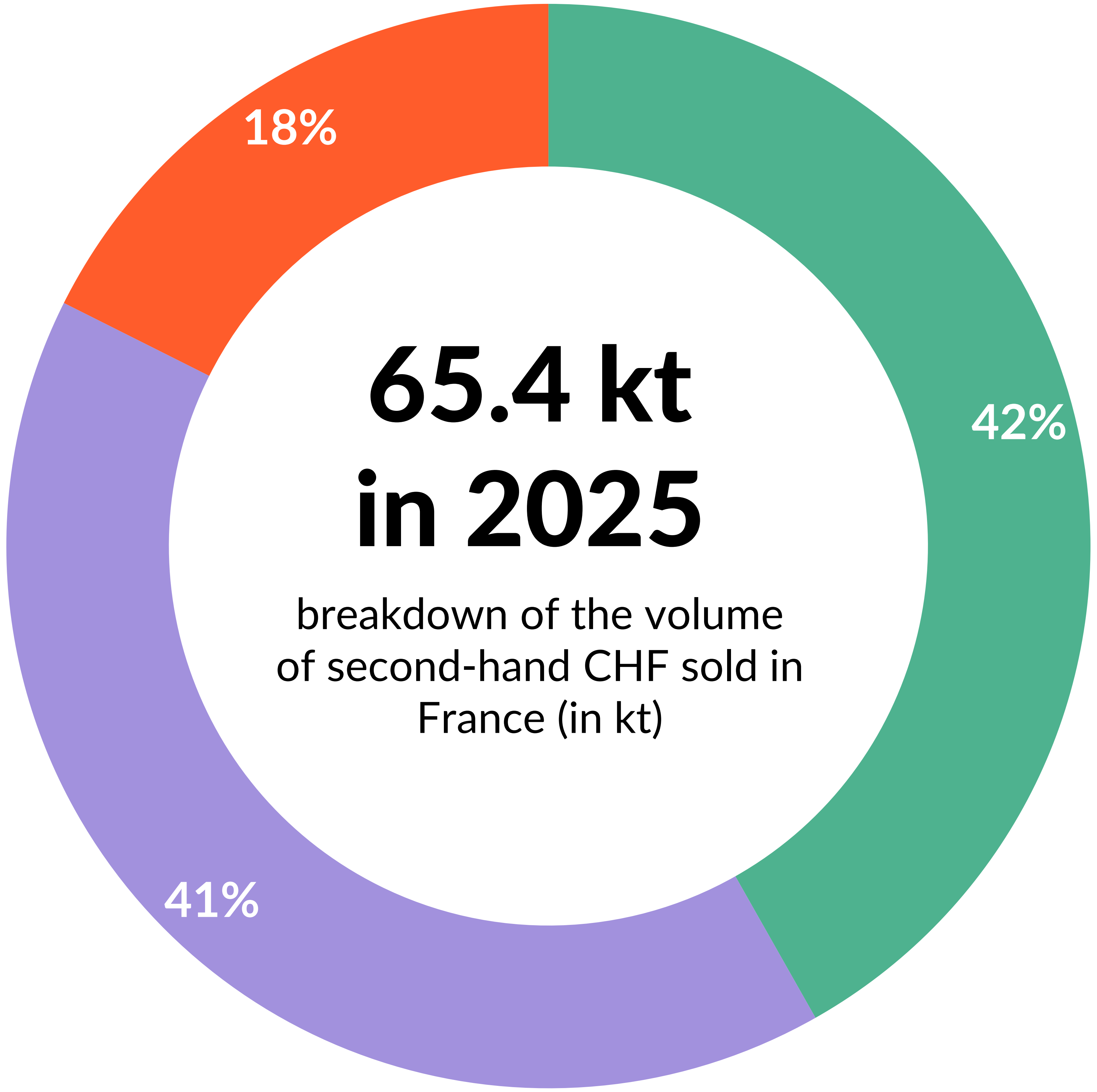
SSE stakeholders offer a **physical supply throughout the whole country.**

Data reliability index:

High: estimate based on traced and audited data.

Medium: estimate based on sources deemed reliable, with good data completeness.

Low: estimate based on available data, with partial information.



C2C Commercial organisations providing platforms to connect private individuals

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

B2C Commercial companies selling second-hand clothing

Second-hand volumes continue to grow this year

A 5% **increase** in the volume of second-hand CHF sold in France between 2024 and 2025.

Second-hand represents **7.2% of total CHF tonnages consumed** in France in 2025.

Data reliability index:

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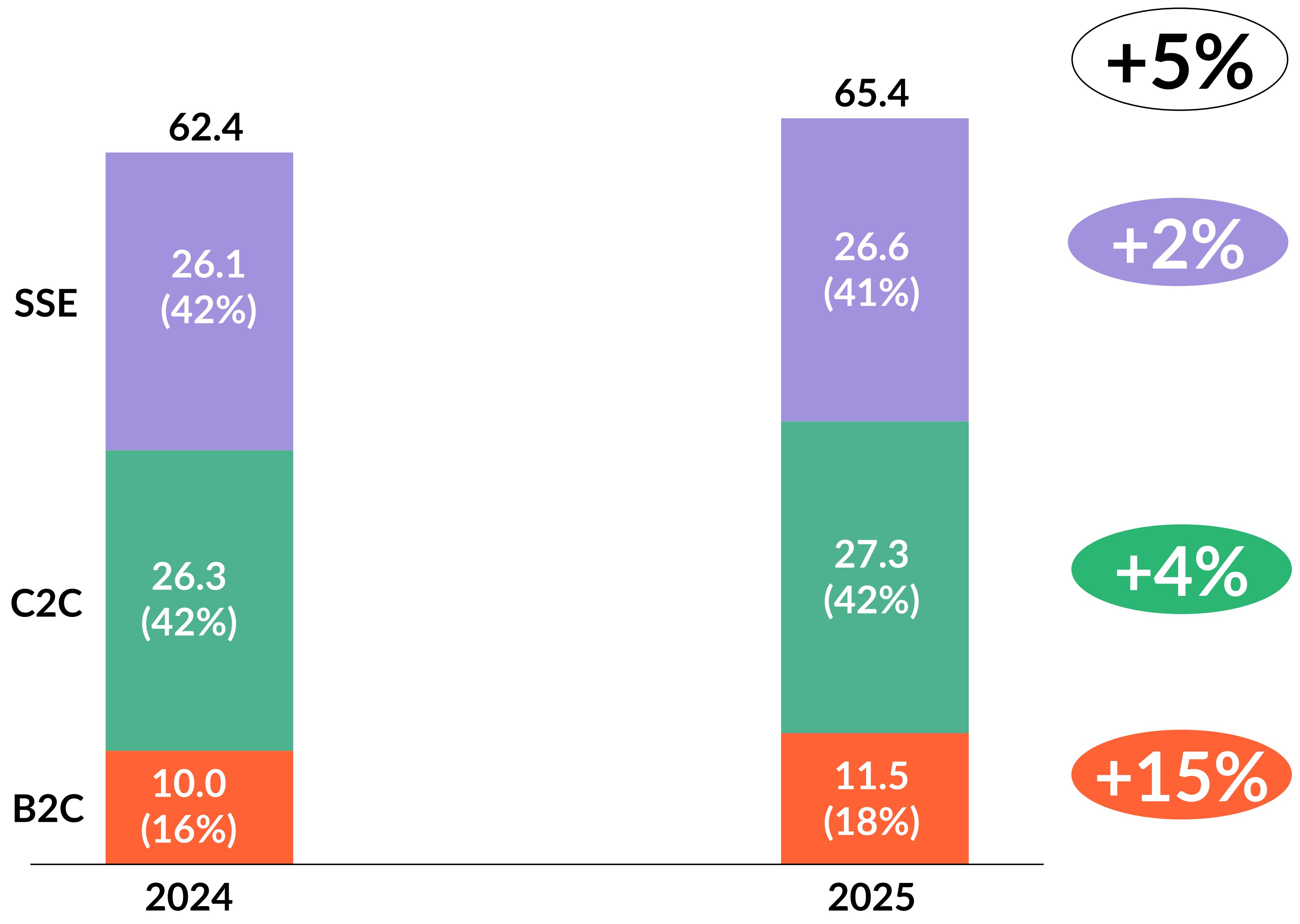
Breakdown of second-hand CHF volume sold in France, in kt

Evol. between 2024 and 2025



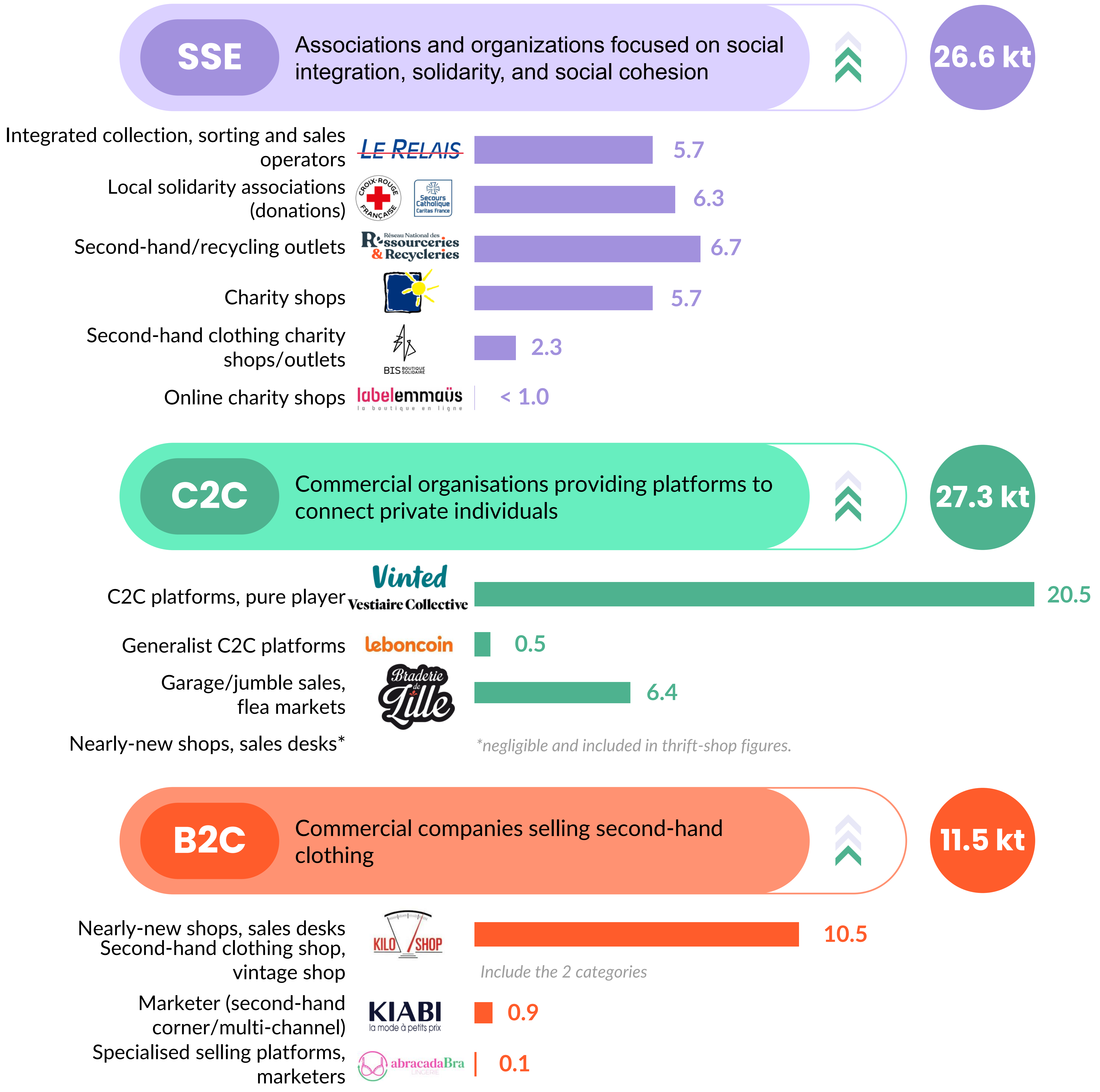
C2C Commercial organisations providing platforms to connect private individuals

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

B2C Commercial companies selling second-hand clothing

Vinted alone represents just over one quarter of these volumes

Volume of second-hand CHF redistributed by stakeholder, in kt



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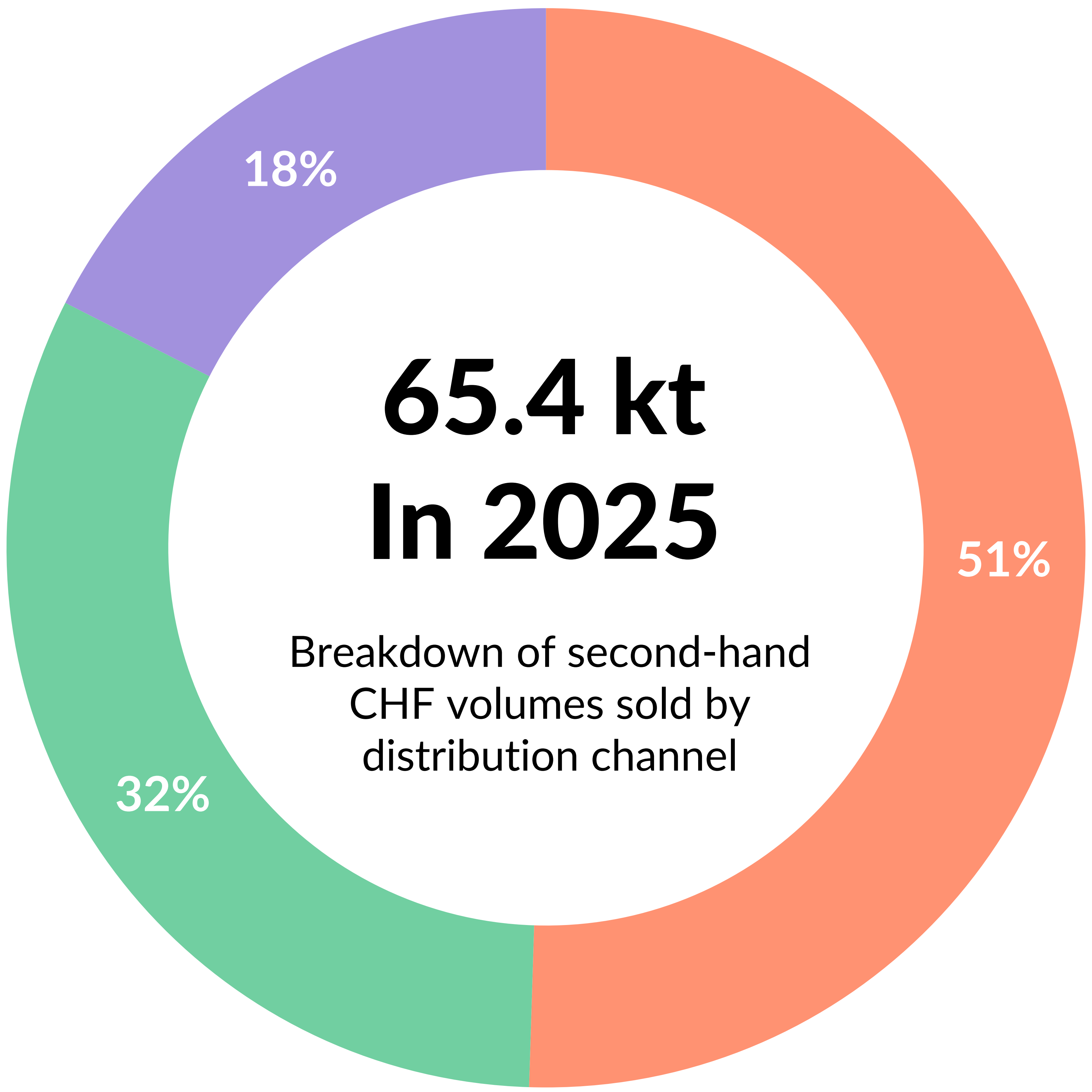
The physical channel remains dominant in volume, despite the importance of digital platforms

Out of 65.4 kt of second-hand CHF distributed in France in 2025, 51% of the volume moves through physical channels, 32% through online channels and 18% through omnichannel distribution, mainly driven by pure-player C2C platforms.

The online channel has developed extensively in recent years, but the physical channel retains advantages such as the possibility of direct contact with the product, allowing consumers to try it and assess its quality in terms of both condition and style.



Physical Online Omnichannel

SSE

1 Integrated collection, sorting and sales operators
2 Local solidarity associations (donations)
3 Second-hand/recycling outlets
4 Charity shops
5 Second-hand clothing charity shops/outlets
6 Online charity shops

C2C

7 C2C platforms, pure player
8 Generalist C2C platforms
9 Garage/jumble sales, flea markets

B2C

10 Nearly-new shops, sales desks
11 Mobile second-hand clothing dealers
12 Second-hand clothing shop, vintage shop
13 Marketer (second-hand corner/multi-channel)
14 Specialised selling platforms, marketers

02. C.

Value

C2C and B2C capture most of the value

The C2C channel represents **the largest market share** in value terms, at 48%.

B2C has the best value-to-volume ratio: it captures only 18% of volume but 36% of value.

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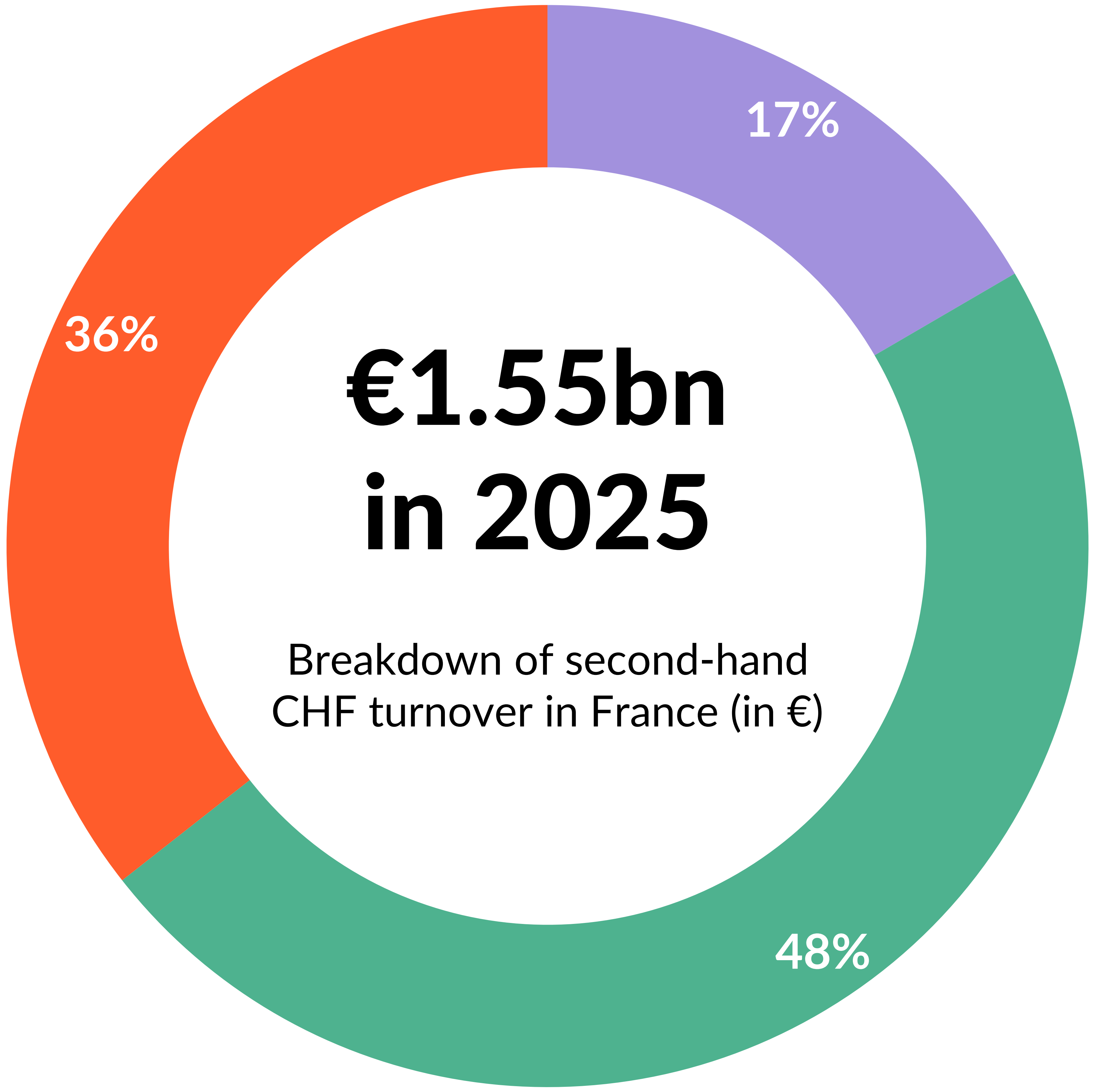


C2C Commercial organisations providing platforms to connect private individuals

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

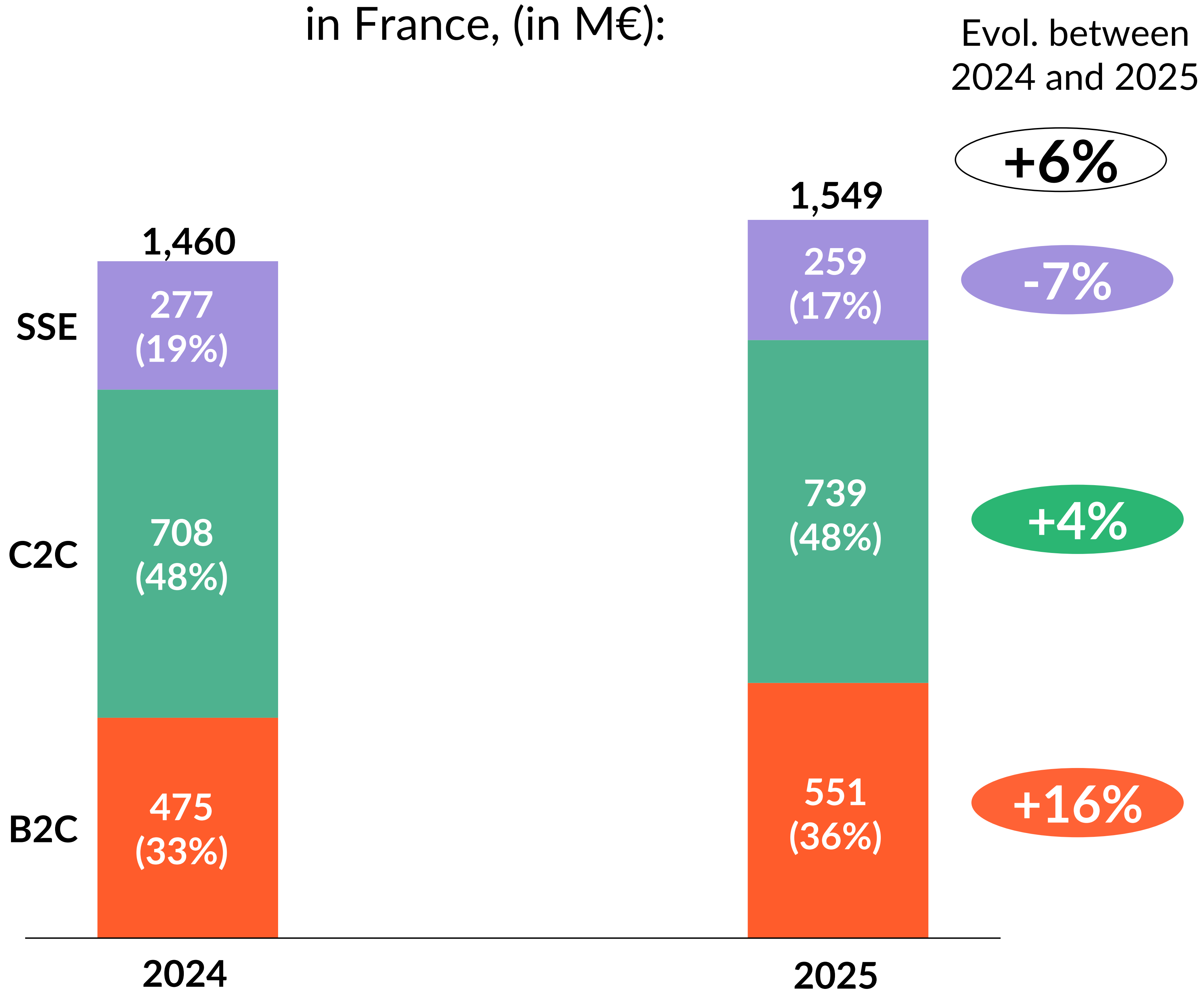
B2C Commercial companies selling second-hand clothing

An increase in the second-hand market in value

The value of the second-hand market increased by 6%.

This increase does not reflect an increase in average second-hand prices; **it comes from the growing share of B2C,** whose average prices are higher, rising from 33% to 36% of the market value terms, while the SSE declines from 19% to 17%.

Breakdown of second-hand CHF value sold in France, (in M€):



C2C Commercial organisations providing platforms to connect private individuals

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A second-hand selling price equivalent to that of entry-level new products

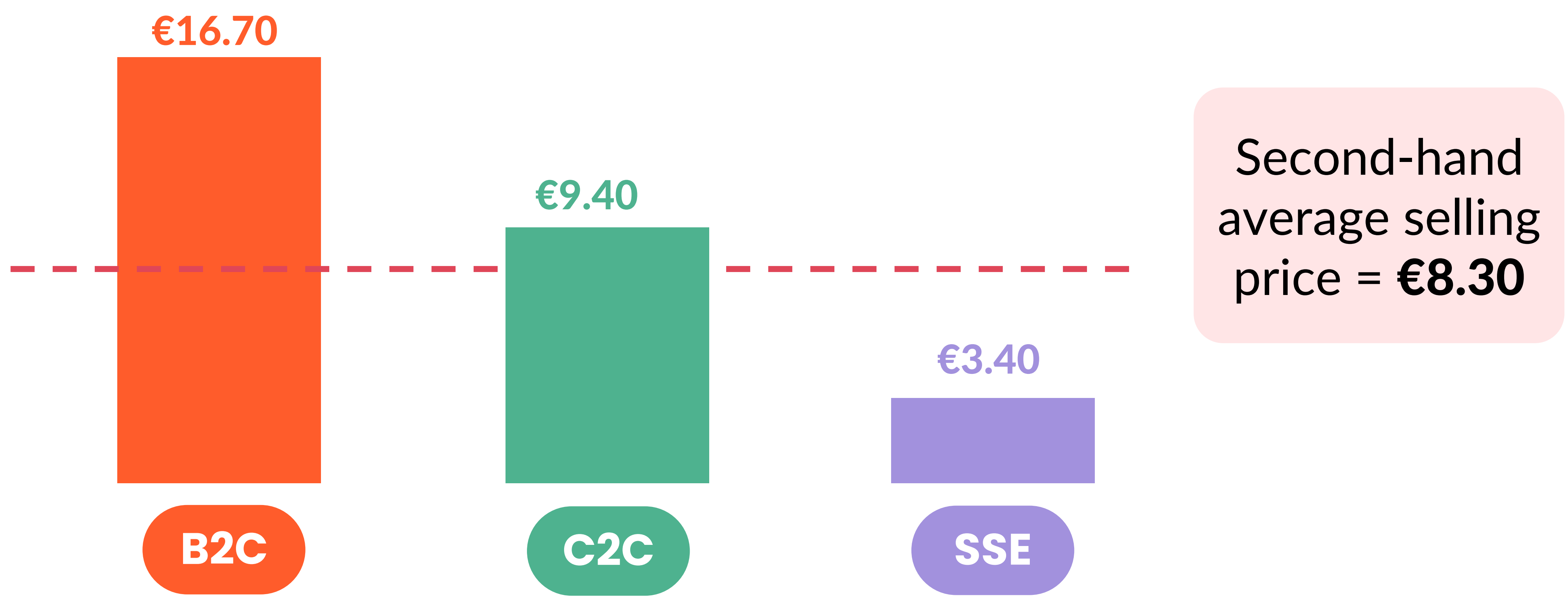
Growth remains driven by volumes, not by prices, which have remained broadly stable.

On average, a second-hand garment costs €8.30, equivalent to an entry-level new garment at €8.50.

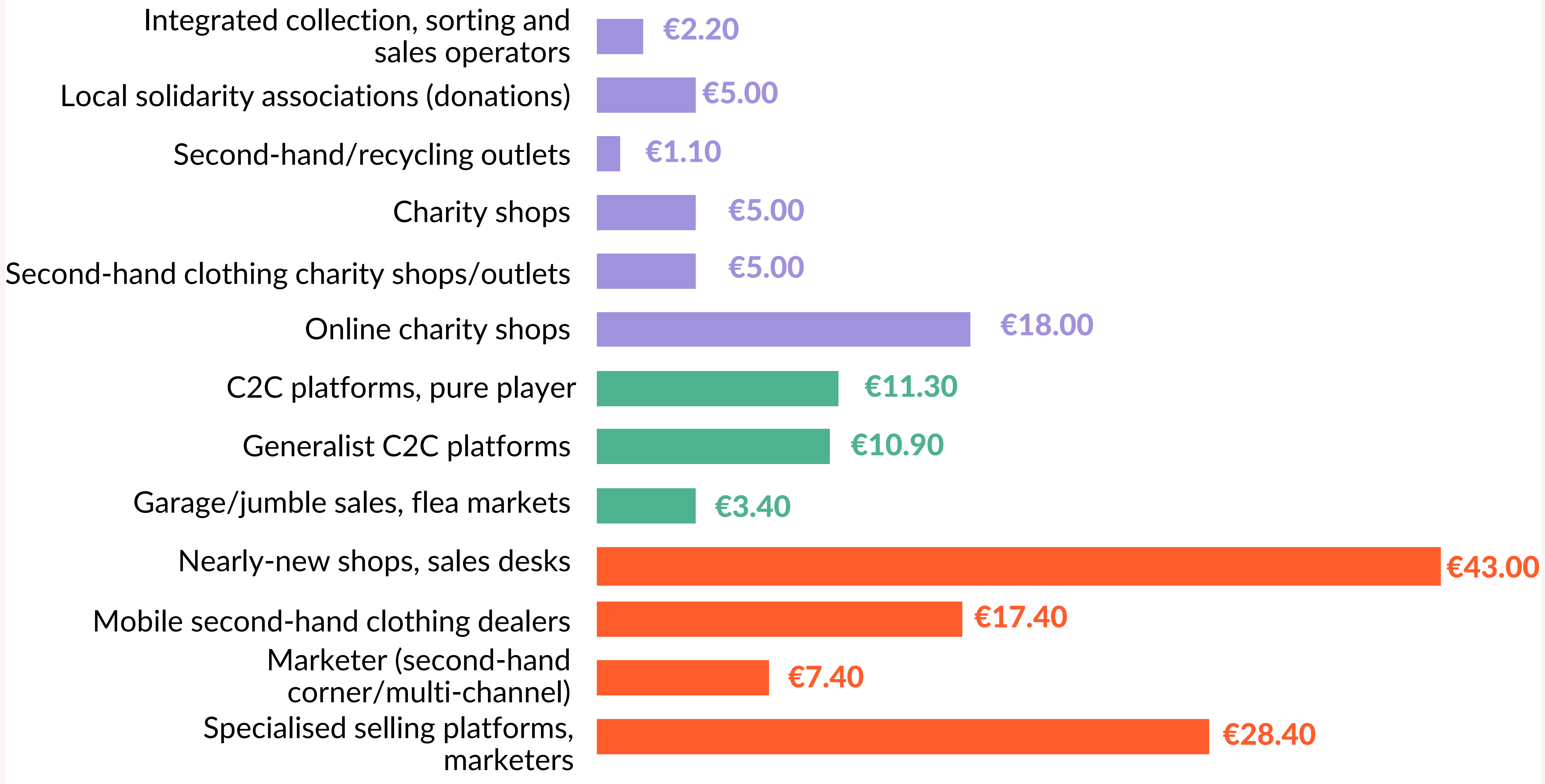
- The SSE is positioned as highly accessible for the most deprived social categories, selling garments for a few euros.
- C2C and B2C stakeholders position themselves across broader price segments, extending to a premium positioning for some stakeholders.

Source: Qualitative interviews, survey, Worldpanel 2025 panel

Average selling price by stakeholder family (in €)



Average selling price per item by stakeholder type in 2025

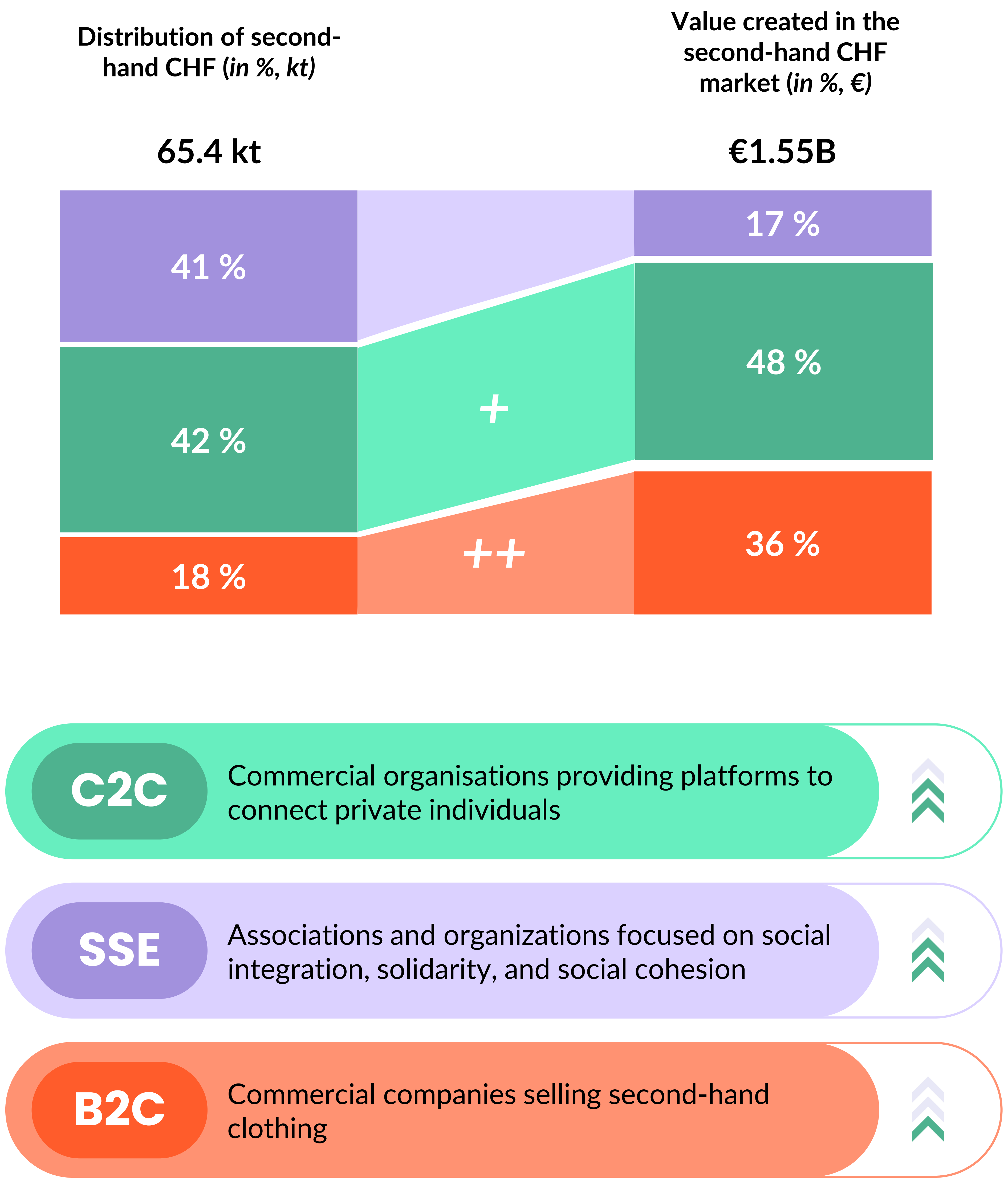


Differentiated second-hand economic valorisation

- For the SSE, the economic recovery potential of CHF remains underexploited: the SSE represents **41% of volumes but only 17% of value created,** a gap reflecting significantly lower selling prices than those of C2C and B2C. Several networks are beginning to move upmarket, but pressure on sources and saturation of market opportunities are slowing this dynamic.

- C2C has established itself thanks to a model that engages the consumer in the most complex tasks for the sector — sorting, selection and product presentation — thereby limiting operational costs. **With 42% of volumes and 48% of value**, C2C generates the largest share of market value.

- With only **18% of volumes but 36% of value created**, B2C has the best value-to-volume ratio of the three segments, supported by a selection logic based on precise specifications. Profitability nevertheless remains to be built, with access to regular source with high reuse after waste status value remaining the main barrier.



Tomorrow: towards greater recovery of second-hand?
3 ecosystems, 3 challenges

SSE

SSE stakeholders are facing **increasing scarcity of premium-grade CHF in their sources.**

Collection quality is deteriorating under the combined effect of **citizens monetising their wardrobes** — keeping valuable items for resale — and a **growing share of textiles with low reuse after waste status value.**

This pressure on sources weighs on economic balances.

C2C

The physical C2C market is stable**, while the digital channel is entering maturity.**

Online growth will no longer come from a discovery effect: **it is now necessary to reach new user segments and retain those already present.**

In this transition context, and in the face of **greater competition between platforms,** differentiation is based **on trust, customer experience quality, transaction convenience and the gradual expansion of categories offered.**

B2C

Thrift-shop figures remain difficult to estimate precisely, but the trend appears to be upward this year. However, these stakeholders operate in a pressured environment: **increasing competition, low margins and administrative complexity** (margin VAT and variable taxation).

For marketers, developing second-hand means much more than adding a category to the existing offer. **It is a deep transformation of the model:** radically different sourcing, rethought merchandising and a re-articulated brand promise.

Some stakeholders have made the move; **many are still experimenting, lacking a fully stabilised business model.**

02. d.

Sources and streams

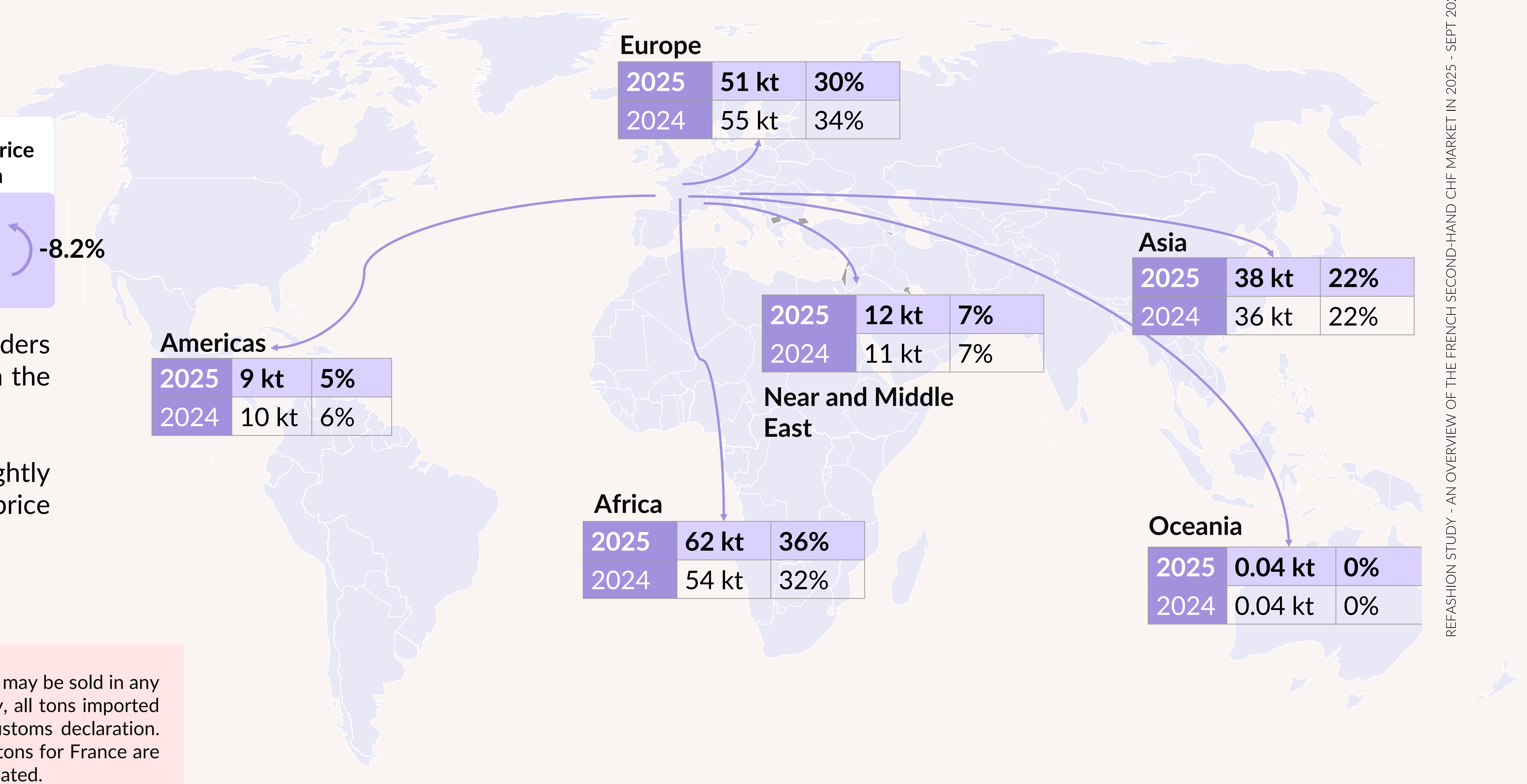
Exported volumes are up slightly, while the average price per ton is down significantly

Export

Export streams*	Total annual weight		Average price per ton	
2025	172 kt	+3.6%	€471	-8.2%
2024	166 kt		€513	

French waste-processing stakeholders export a significant volume of CHF in the form of bales.

Exported volume increased slightly despite the decline in the average price per ton.



(*) Indicative figures: tonnes imported into France may be sold in any thrift shops within the Schengen area; conversely, all tons imported into this area may be sold in France without customs declaration. We considered here that incoming and outgoing tons for France are equivalent. These figures are probably underestimated.

Source : French customs statistics, website, data extracted on 26/03/2026, code 6309 — thrift goods.

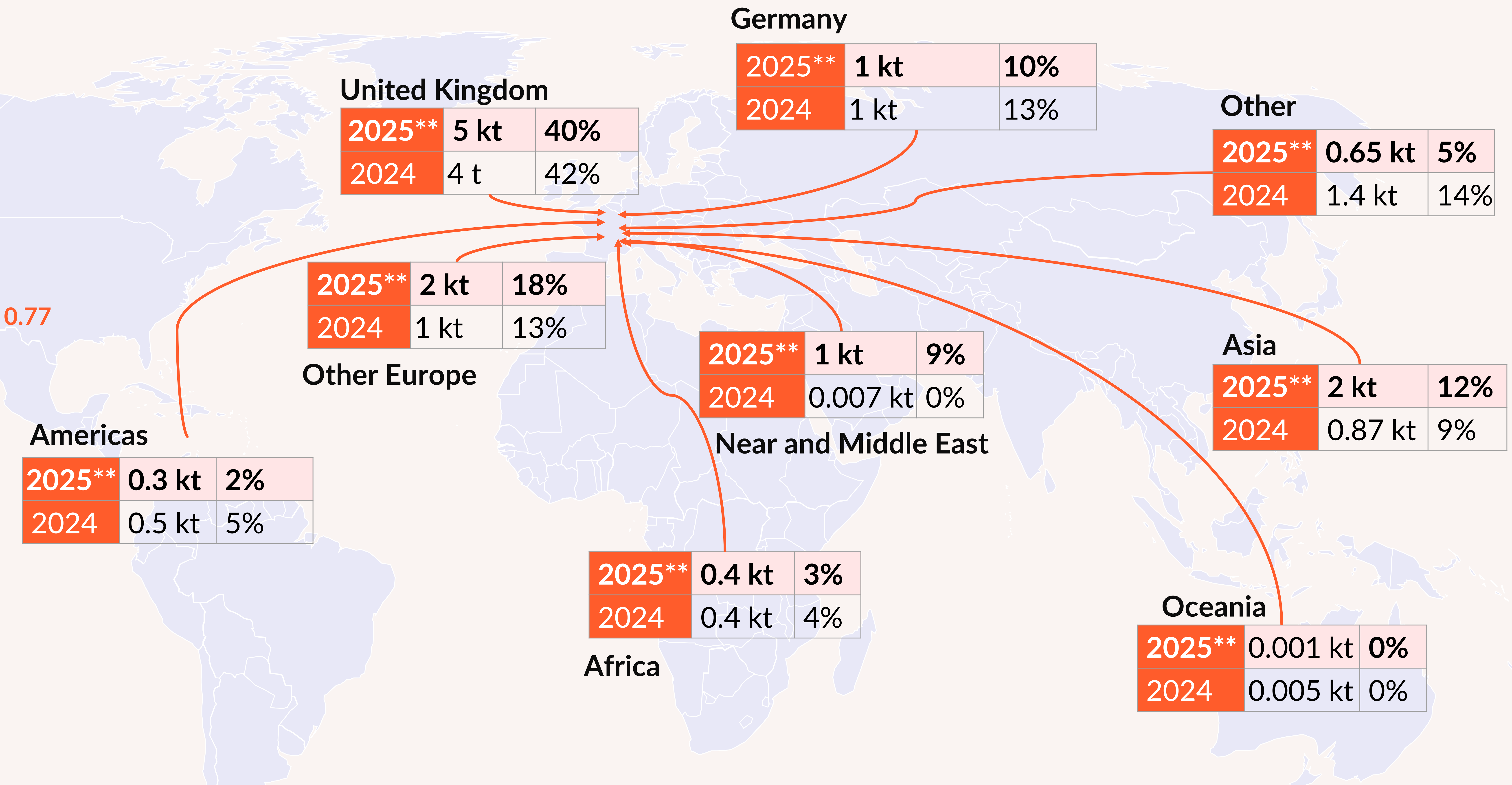
Imports, a pronounced scissors effect: Prices down 25%, volumes up 30%.

Import

Import flows*	Adjusted total annual weight**	Adjusted average price per ton**
2025	13.1 kt	1,487 €
2024	10.1 kt	1,935 €
	x 1.3	x 0.77

B2C: a model relying on imported finely sorted "premium-grade" bales, mainly from Europe

Imported bales contain a selection of high-quality items, **offering strong potential for recovery in France.**



(*) Indicative figures: within the European Union, goods circulate freely once imported. Intra-EU flows are partially traced via statistical declarations (Intrastat), but small operators are exempt, making it difficult to isolate the precise volumes marketed in France from exports.

(**) Methodological adjustment: the volumes declared as "Germany" in 2025 mainly reflect H7 parcels and vintage batches reshipped through German logistics hubs, such as Vinted Go and DHL eCommerce. To isolate changes in actual "material" sourcing, the adjusted total weight is calculated as total mass minus flows transiting through German hubs.

Source : French customs statistics, website, data extracted on 26/03/2026, code 6309 — thrift goods.

02. e.

Focus on reconditioning

Reconditioning: care and repair - between volume potential and value requirements

1 The foundation: care

The most widespread action
Steaming, washing, steaming, stain removal and dry cleaning.

The next lever for increased volumes
Ozone or UV disinfection and integrated laundry, with the objective of processing more items with less water and fewer products.

This allows
To increase the reuse rate and reassures customer about the hygiene.

2 The filter: repair

A selective and more complex intervention
1% of second-hand items are currently repaired.

Priority is given to light and invisible repairs
Sewing, buttons, zips, glue points and shoe aesthetics. Scaling up also relies on trained people.

The equation to respect
no more than 30 minutes per item and a resale price of around 30€ minimum.

To scale up

Three requirements:

- Targeting items according to their value and profitability
- Industrialising techniques
- Pooling and securing volumes

Resale value determines the relevant level of intervention.

02. f.

Environmental impact

What impacts for second-hand in 2025?

FRANCE

Direct impacts are low and mainly linked to the treatment of unsold second-hand products (with an assumption of 25% unsold items).

Carbon benefit
/reused textile item*

-1.5 $kgCO_2e$
Equivalent to 512 km on a TGV

OR

- 11 m^3 of water, particularly from cotton production, equivalent to 110 showers

OR

- 21 MJ of fossil energy

* By replacing a new product in 74% of cases

OUTSIDE FRANCE

Direct impacts are significant and mainly linked to transport to sales countries and the treatment of unsold products outside Europe (with an assumption of 60% unsold items).

Carbon benefit
/reused textile item*

-0.3 $kgCO_2e$
Equivalent to 102 km by TGV

OR

- 4 m^3 of water, particularly from cotton production, equivalent to 40 showers

OR

- 7 MJ of fossil energy

* By replacing a new product in 30 to 50% of cases

In comparison, **throwing a used garment into the bin = +0.2 kgCO2e** per textile item discarded.

To reduce the environmental impact of second-hand, favour Local reuse making it more desirable.

Source : Environmental Assessment 2025, Refashion, volumes collected by Refashion-contracted stakeholders in 2025.

03.

Second-hand CHF consumption in France in 2023

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 larger quantities

74% replace new with second-hand in their last purchase

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%
Marketers' physical sites	35%
Online B2C	31%
Marketers' online sites	30%

C2C

7.2 visits resulting in 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% cite lack of hygiene

54% report an unsatisfactory buyer experience

NON-BUYERS WHO INTEND TO BUY

19% of the French population

*** Results from the June Marketing study for Refashion – October 2024*
A n online study on a panel of 2,500 French > 16 years old +, buyers and non-buyers of second-hand CHF

Overview of channel strengths and weaknesses

Perception & image of second-hand channels

	Key criteria	Trust in the channel	Enable consumers to do a good deed	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 high-end 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

04.

Key learnings and challenges

Key learnings and challenges

Second-hand CHF

A sector growing faster than new products

+5% in volume
+6% in value

65.4 kt in 2025

- Expand the market and establish second-hand as the first purchasing reflex with substitution to new products
- Develop collaborations between stakeholders

SSE

Developing but still under pressure

+2% in volume

- Collection quality is declining, but stakeholders are developing better traceability and customer experience
- Make professionalisation a lever for volume growth, without betraying the social purpose

C2C

Entering a maturity phase

+4% in volume

- After years of strong growth, digital C2C is beginning to stabilise in France
- Seek new buyers and retain existing ones in a market that no longer grows through a windfall effect

B2C

Undergoing a major transformation

+15% in volume

- Driven by thrift shops and imports. Brands/retailers: a model still searching for itself
- Transform retailers' "all-new" model into a "new and second-hand" model that encourages substitution

Reconditioning

A lever that must scale up

<1% of second-hand items have undergone restoration

- Care is the most standardisable action; repair remains selective
- Scale up and industrialise reconditioning to maximise recovery and achieve profitability

*2025 vs 2024

05.

Appendices

Definitions

Clothing, Household linen and Footwear (CHF)

All clothing (clothing in synthetic and/or natural materials, excluding professional uniforms), Household linen (excluding furnishing materials) and Footwear for domestic use.

Gross collected

“Gross collected” or “original clothing” refers to the used CHF streams collected at a self-deposit collection point before any sorting operation is carried out. It will be sorted in order to be reused after waste status, transformed into cloth making material, garneting or energy recovery.

Premium-grade CHF

This is good quality CHF that can be reused and/or easily resold on the second-hand clothes market.

Reuse after collection

All waste prevention operations in which substances, materials or products are used again for the same purposes for which they were designed. This concept is close to “reuse after waste status” but slightly differs because it describes products that have not been classed as waste.

Reuse after waste status

Any operation in which substances, materials or products that have become waste are used again for the same purpose. This follows sorting operations (article L 541-1-1 of the French Environment Code).

Second-hand

All products that after having been used once are acquired by a new owner to be used again for identical purposes.

Premium-grade selective sorting

Operation to extract the premium-grade from gross collected clothing. This premium-grade clothing is sold “as is”, in second-hand clothing shops or charity shops in France or abroad. This operation does not constitute a sorting operation likely to be funded by a producer responsibility organisation.

Marketer

Any natural or legal person who places on the national market for professional purposes new clothing, household linen and footwear (CHF) for domestic use, pursuant to article L 541-10-3 of the French Environment Code. A marketer may be a manufacturer, an importer or a distributor/retailer of such products.

Source : Legifrance, Oxfam

Definitions

Collection operator

An operator that is responsible for the logistics of collecting the contents and/or surplus CHF waste from a self-deposit collection point. An operator may or may not be both a collection operator and an SDCP operator.

Sorting Operator/Sorter

A sorting facility operator that sorts used CHF that has been collected separately in accordance with the provisions of Chapter 3 of Refashions' Authority Approval Specifications document.

Container

A bin/skip made available to the public in public areas (road, municipal recycling facility, etc.) or in private areas (car parks, shops, supermarkets, etc.) in order to deposit used CHF. They are designed so as to resist bad weather and protect the clothes from humidity and dust.

Initial sort

An operation that enables items from gross collection to be classified and to separate:

- The items (the mix) to be reused after collection
- The items to be recycled or energetic recovery
- The final waste clothing resulting from sorting

Self-deposit collection point (SDCP)

Address where the public can deposit used CHF. This may correspond to:

- Containers on public roadsides, in private areas, in municipal recycling facilities,
- A used CHF recovery facility in a charity's premises, a shop selling CHF,
- An event where CHF is recovered on the marketplace or during a market,
- Door-to-door collection.

Source : Legifrance, Oxfam

Re_fashion

Changeons notre mo(n)de, durablement.