Re_fashion

Refashion Barometer on New Textile & Footwear Sales

Decoding consumer behavior in France in 2023

_introduction

Who is Refashion?

Refashion is the *eco-organization* for the Textile, Household Linen, and Footwear sector in France. Its mission is to mobilize *professionals and citizens* to reduce the *environmental impacts* of textile and footwear throughout their life cycle.

As an eco-organization, its missions and objectives are strictly regulated in a specification controlled annually by the Government until 2028.

Refashion is funded by brands, distributors, and producers – also known as market operators – through eco-contributions. Refashion collects eco-contributions to implement actions to meet the objectives set by the specification.

Refashion Barometer on New Textile and Footwear Sales

*An **annual meeting** for the entire sector.*

_A dual ambition

Provide a ***neutral and factual*** view on recent market trends based on Refashion's sales data, the only organization ***with national data on sold volume*** (+10,000 market operators). These are audited data with annual monitoring.

Monitor and understand consumption trends to guide actions towards more sustainable fashion that ***Reduce, Repair, Reuse, and Recycle.***

_A partnership with Kantar

For this first edition, a partnership with the research institute ***Kantar Worldpanel***, which will provide additional insights with a view of ***local consumption***, particularly by price ranges.

_Internal
Refashion data

Methodology

Data based on market declarations in France, sales or donations, in volume on new items (number of articles) among 10,735 members.

Data declarations closed on 04/15/2024

Data concerned:

2023
January 1 to December 31

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2022
January 1 to December 31

State of new *textile* and *footwear* *sales* in 2023

Big Picture

3.2 billion new items sold in 2023,
more than 6,000 new items per minute

Top 3 best-selling categories

Clothing
2,676 millions
-
Underwear and footwear fitting: **1 billion**
T-shirts: **412 millions**
Pants: **264 millions**

Footwear
250 millions
-
Baskets / Sneakers: **94 millions**
Summer shoes: **64 millions**
Closed shoes: **49 millions**

Household linen
321 millions
-
Bedding: **103 millions**
Bath linens: **94 millions**
Linens table: **15 millions**

Key facts

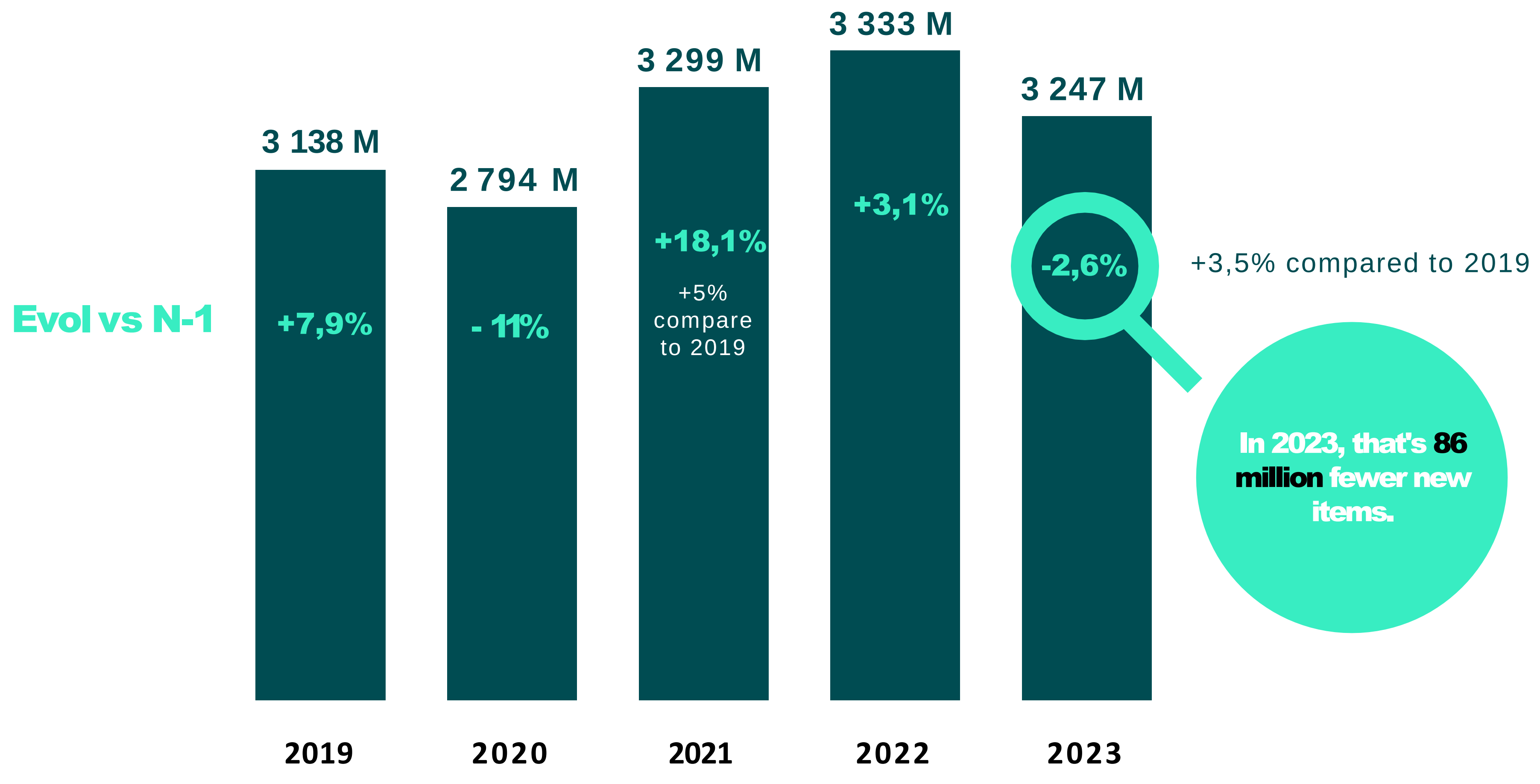
1

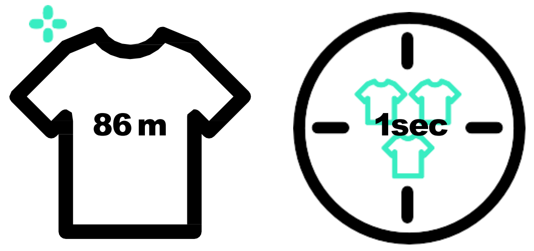
Stagnating new sales volumes in 2023

The decline in new sales in 2023 indicates a decrease in consumption for the first time

Sales of new items

Volume in millions of items





In 2023, ***86 million fewer new items*** were put on the market compared to 2022... Which is equivalent to ***3 fewer new items every second.***

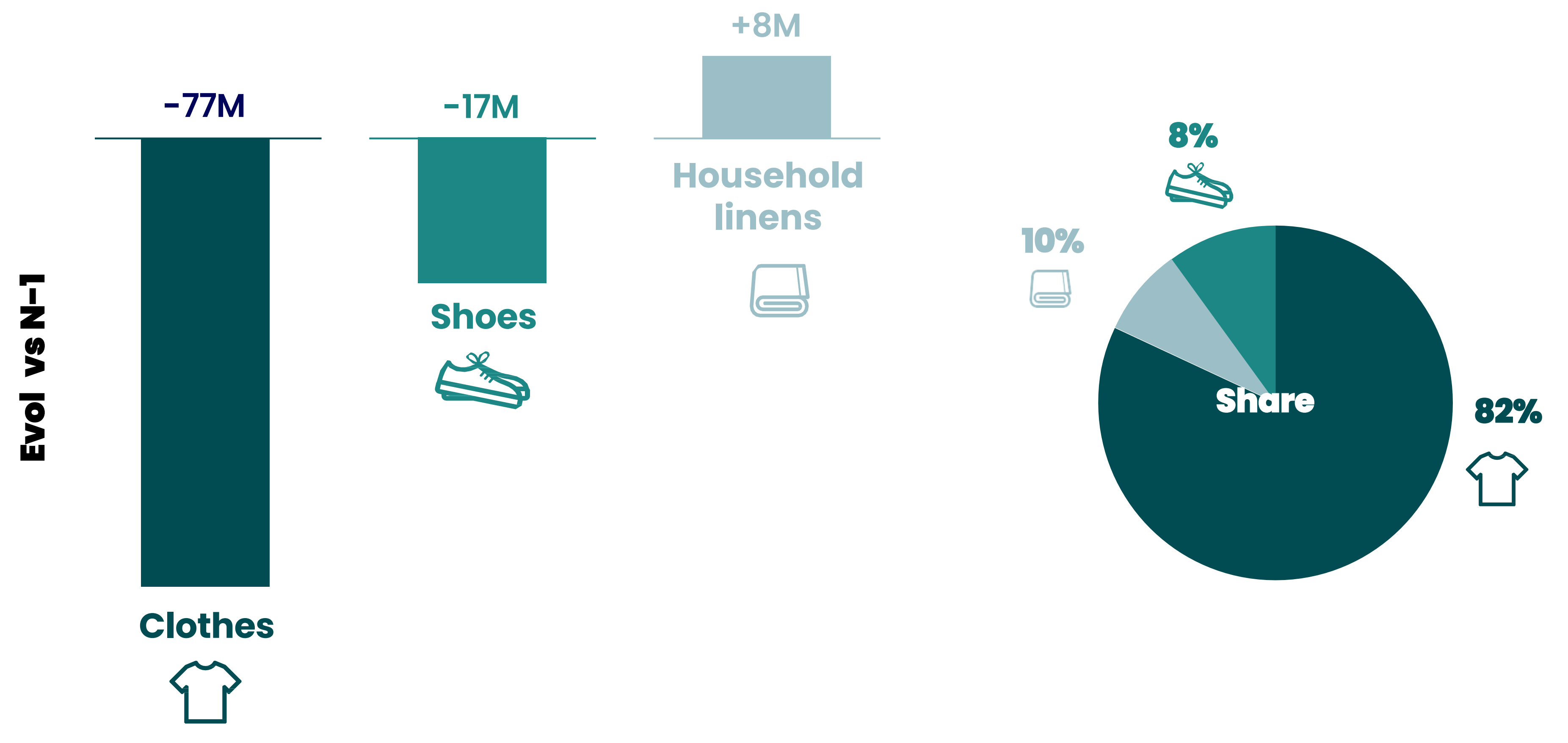
Focus on the decline in sales

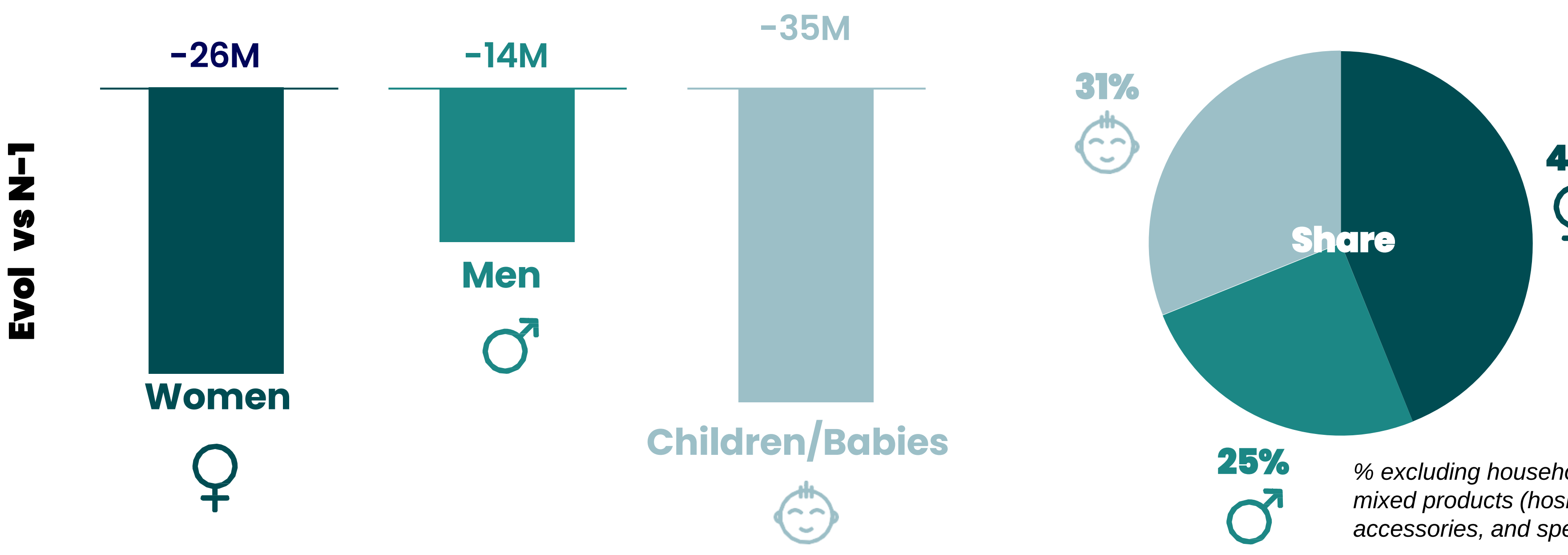
Clothing is solely responsible for 90% of the volume decrease

Household linen is the only market segment experiencing growth.

Clothing and footwear: an overall decline that particularly affects the *children's* sector.

Sales of new items





% excluding household linen and mixed products (hosiery, socks...) accessories, and specific items

77 million fewer new clothing items compared to 2022.
Clothing represents 82% of market sales.

Key facts

2

A wardrobe still little affected by the sales decline

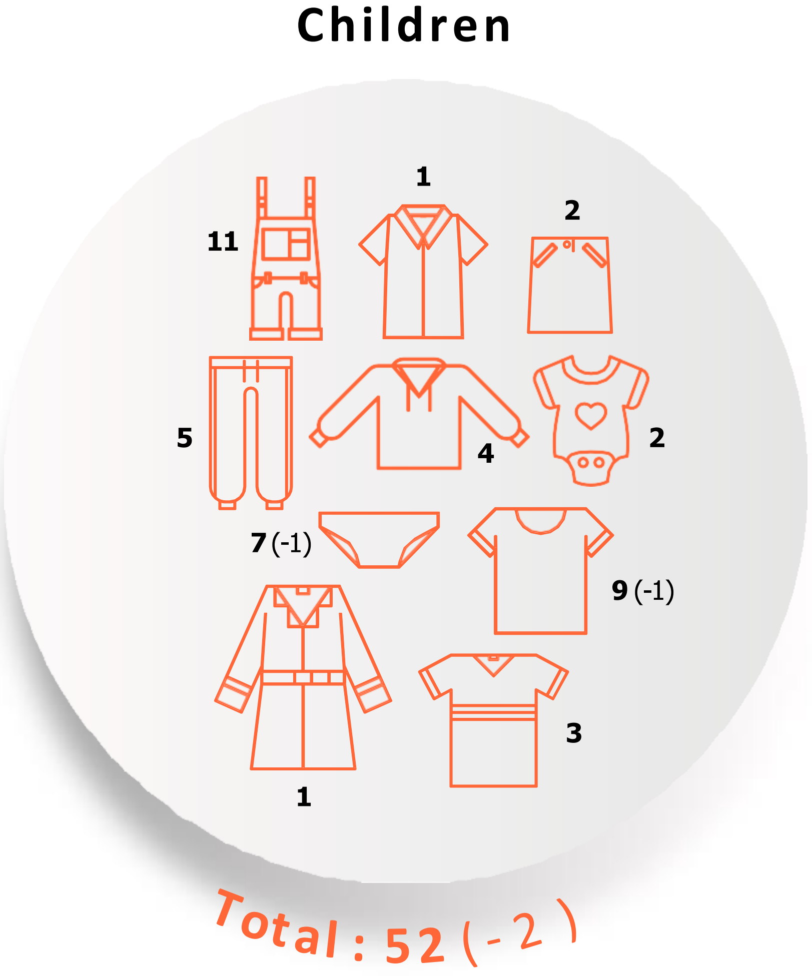
The wardrobe in France
Clothing

On average in 2023, in the French market, **39 (-1) clothing items were purchased per person.**

Women
One less clothing item purchased, mainly in underwear (especially bras)

Children
Rationalization of purchases with ***2 fewer items***, mainly underwear and t-shirts

Men
A stable market



Key insight: In France in 2023, there were 8 new pieces of women's underwear purchased per person, which is one piece less compared to 2022.

Excluding unisex items: footwear fitting

The Wardrobe in France
Footwear

On average in 2023, in the French market, **4 pairs of shoes were purchased per person.**

...And for household linen

On average in 2023, in the French market, **5 household linen items were purchased per person.**

Women

Closed shoes	1
Summer shoes	1
Sneakers Baskets	1

Total : 3

Children

Closed shoes	1
Summer shoes	1
Sneakers Baskets	2
Baby shoes	1

Total : 5 (-1)

Men

Closed shoes	1
Summer shoes	1
Sneakers Baskets	1

Total : 3

(-/+) changes compared to 2022
Excluding unisex items: footwear, indoor shoes

Key Insight: In France in 2023, there was 1 pair of closed shoes purchased in the women's section per person.

Key facts

3

Behind the decline: Rationalization of purchases at work in the clothing sector

Focus on Clothing

Key facts :

Underwear and t-shirts account for the decline ***in the clothing segment***.

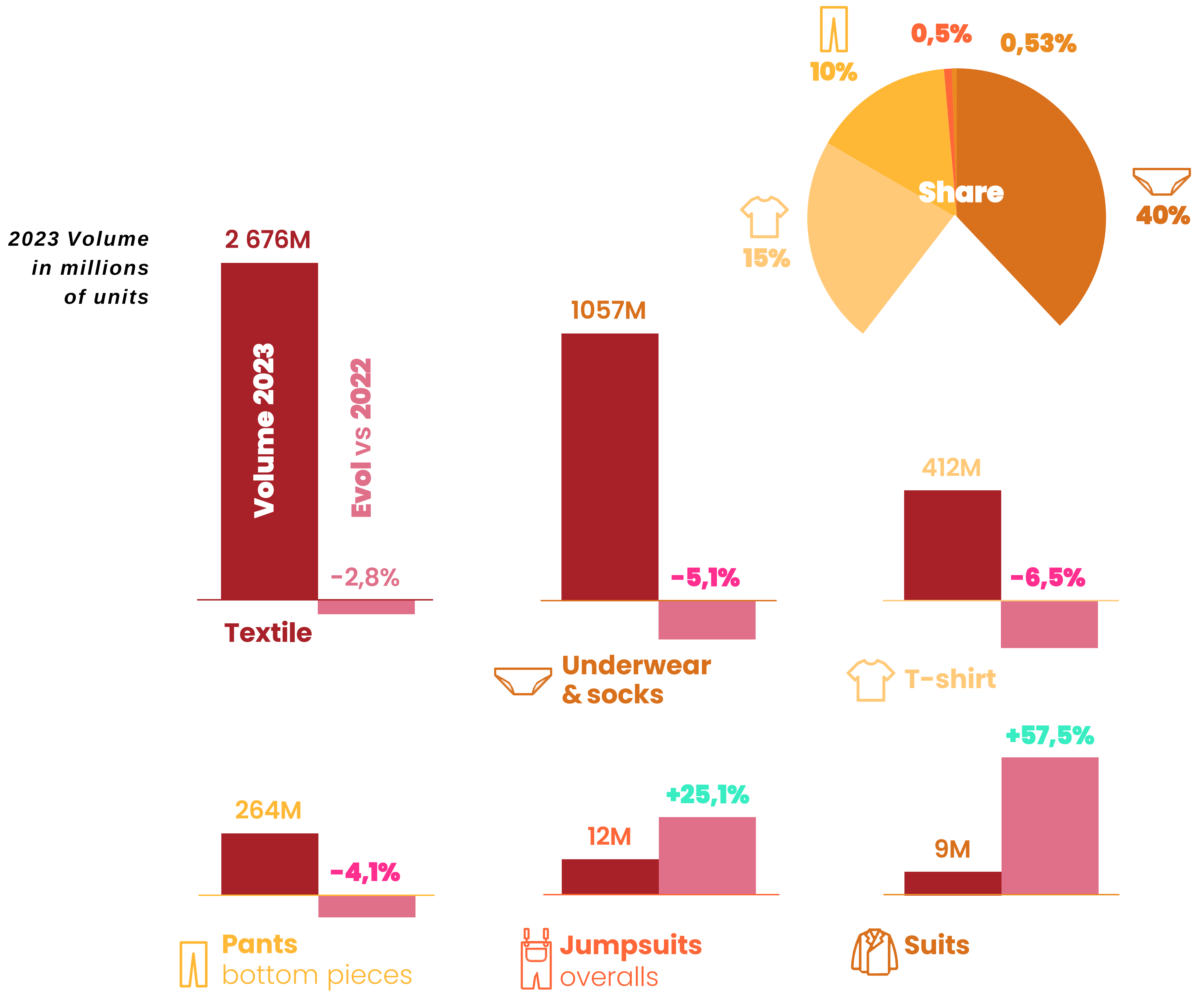
Excluding underwear and t-shirts, clothing would see a slight increase ***(+0.7%).***

A rationalization is underway for undergarments (non-visible items).

Regarding pants: dress pants are down by 9% compared to jeans, which are up by 1%, and sport/jogging pants, which are up by 2%.

Sharp increase in jumpsuits and suits (ceremony effect)

Sales of clothing by category



Key Insight: In France in 2023, **1.057 billion new items** of underwear/legwear were sold, representing 40% of the clothing market in volume. This category saw **a decline of -5.1%** compared to 2022.

Key facts

4

Behind the decline:
Shoe sales slump, including in the sneaker segment

A rationalization of purchase also in footwear

Key facts :

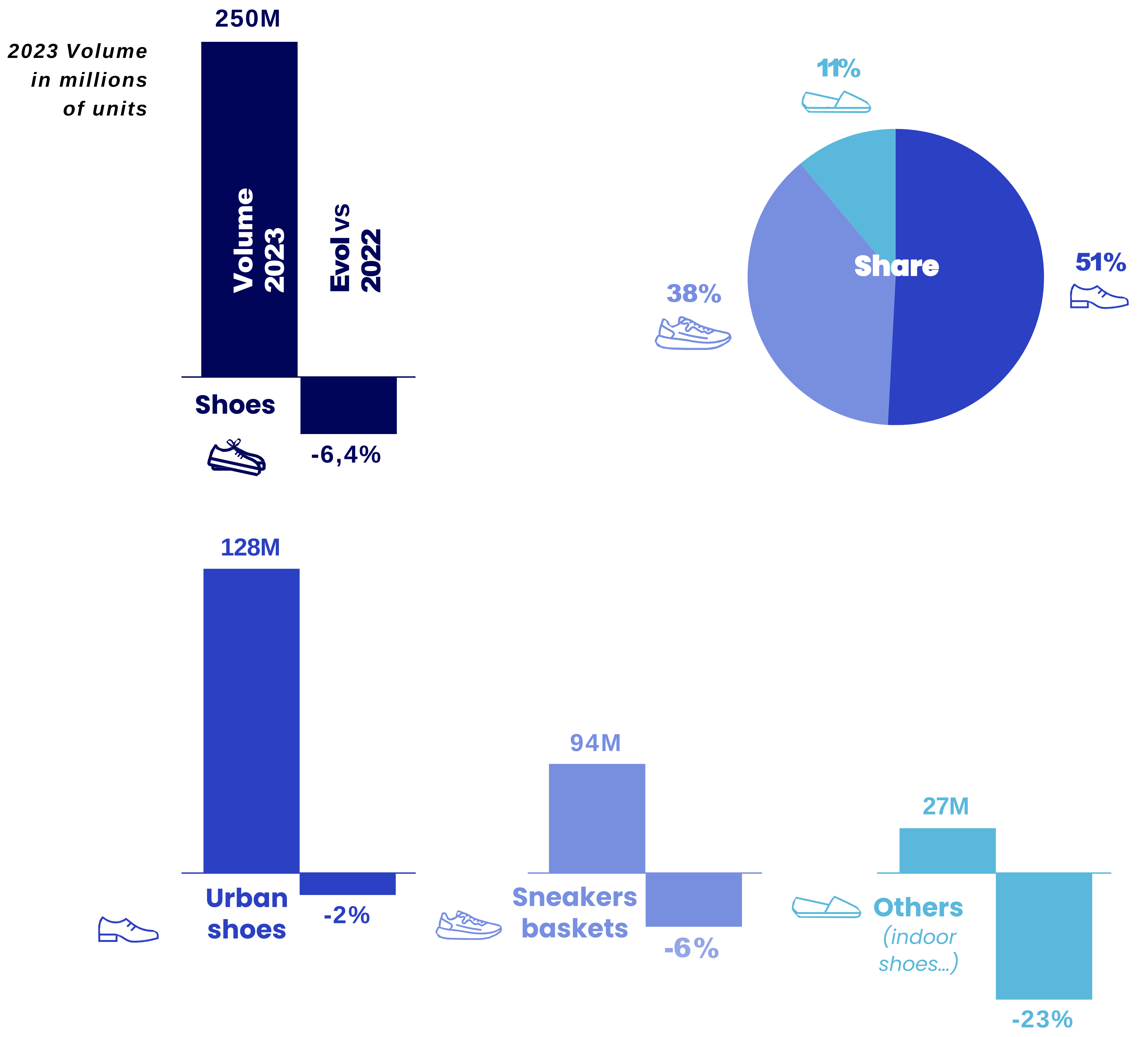
In footwear, a decrease of ***17 million pairs*** compared to 2022, mainly driven by:

Sneakers/trainers with a ***decrease of 6 million pairs***, accounting for ***37%*** of the decline in footwear released in 2023.

This trend is attributed to reduced sales of sports-use sneakers and a slowdown in sneaker sales overall.

Indoor shoes with a ***decrease of 8 million pairs***, accounting for ***49%*** of the decline in footwear released in 2023.

Sales of footwear by category



Key Insight: In France in 2023, **128 million pairs** of new urban shoes were sold, accounting for 51% of the footwear market by volume.
This category saw a **decline of -2%** compared to 2022.

A significant decline

Key facts :

A historic decline in footwear with ***17 million fewer*** pairs sold compared to 2022.

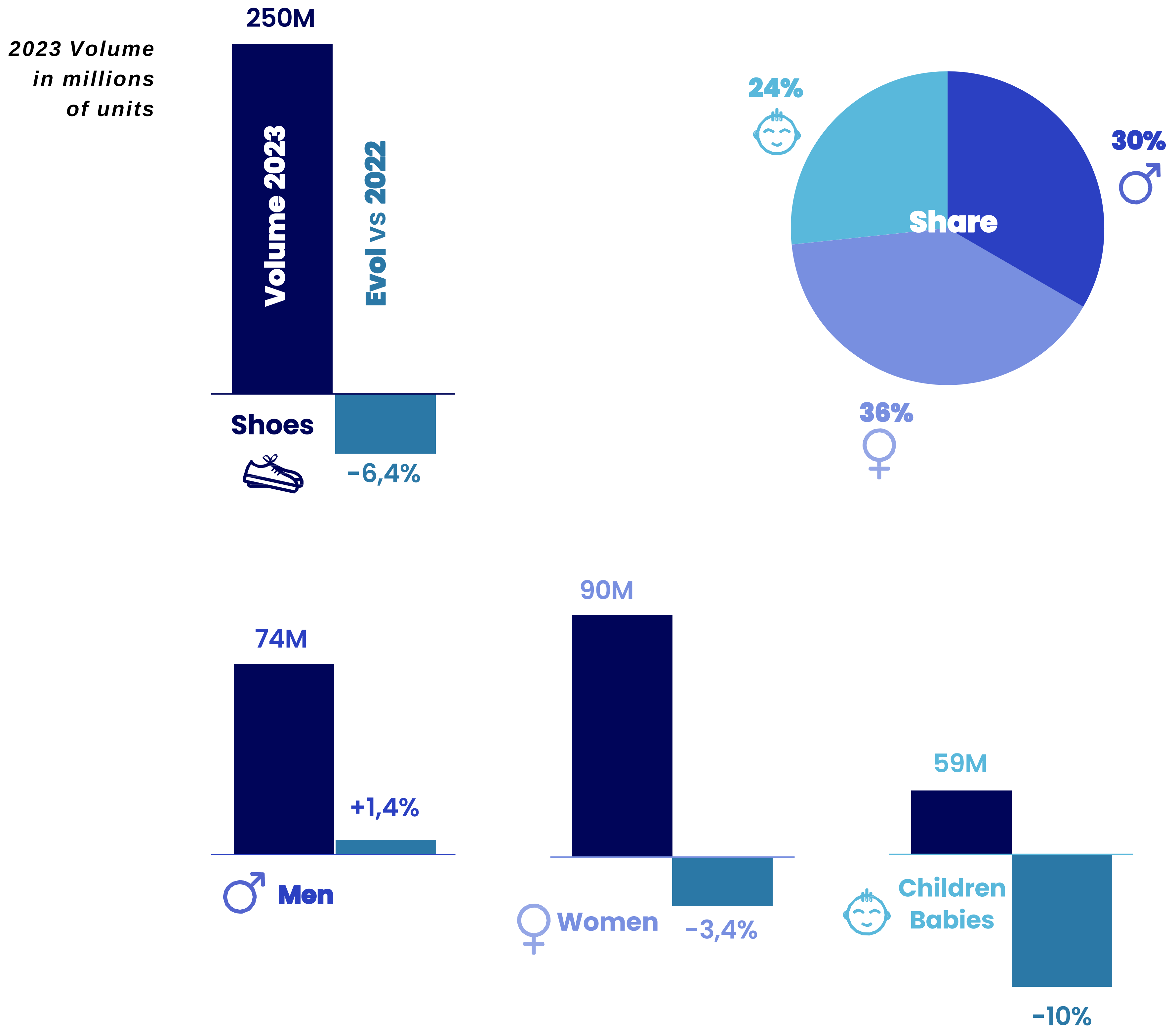
That’s 32 fewer pairs of shoes sold per minute.

Men's footwear is the only category seeing an increase.

6 out of 10 pairs of shoes sold for men are sneakers/trainers.

If sales of sneakers/trainers are stable in the men's section, it's the summer shoes where the growth has occurred.

Sales of footwear by department



Key Insight: In France in 2023, **74 million** pairs of new shoes were sold in the men's department, accounting for 30% of the footwear market by volume. This category saw an **increase of +1.4%** compared to 2022.

Key facts

5

And...
a growing household linen market

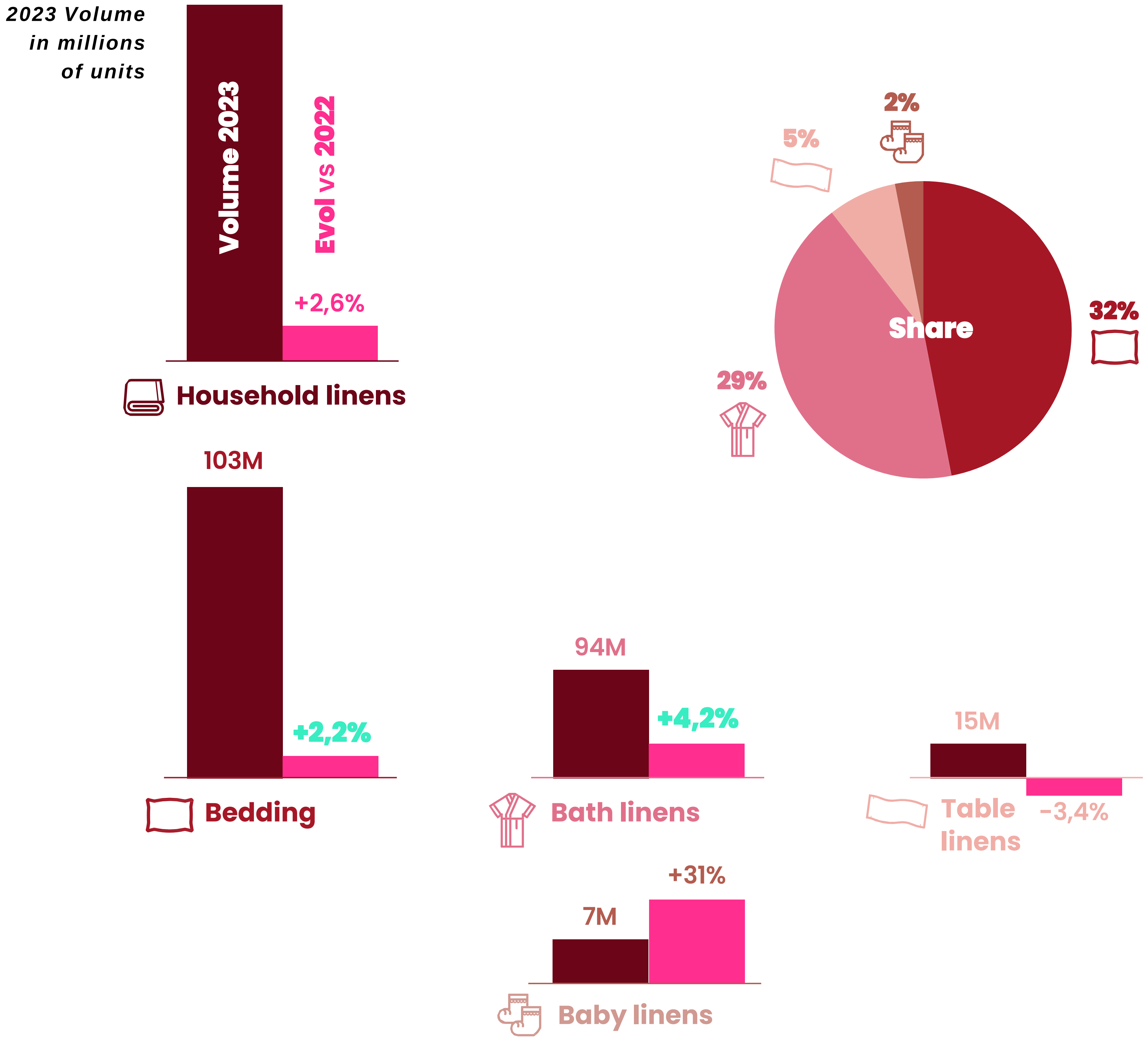
Sales of household linen

An increase in all sub-categories except for table linens.

Key facts :

Unlike clothing and footwear, household linen has not experienced inflation but a ***-5%*** drop in average purchase price

(source *Kantar Worldpanel - 2024*)



Key Insight: In France in 2023, **103 million** new bed linen items were sold, representing 32% of the household linen market by volume. This category saw an increase of **+2.2%** compared to 2022.

Key facts

6

Distribution networks impacted in contrasting ways

An increase in pure-player and discounters

Key facts :

Pure-players and discounters show significant growth

Specialized sports chains and large grocery stores are experiencing a significant decline:

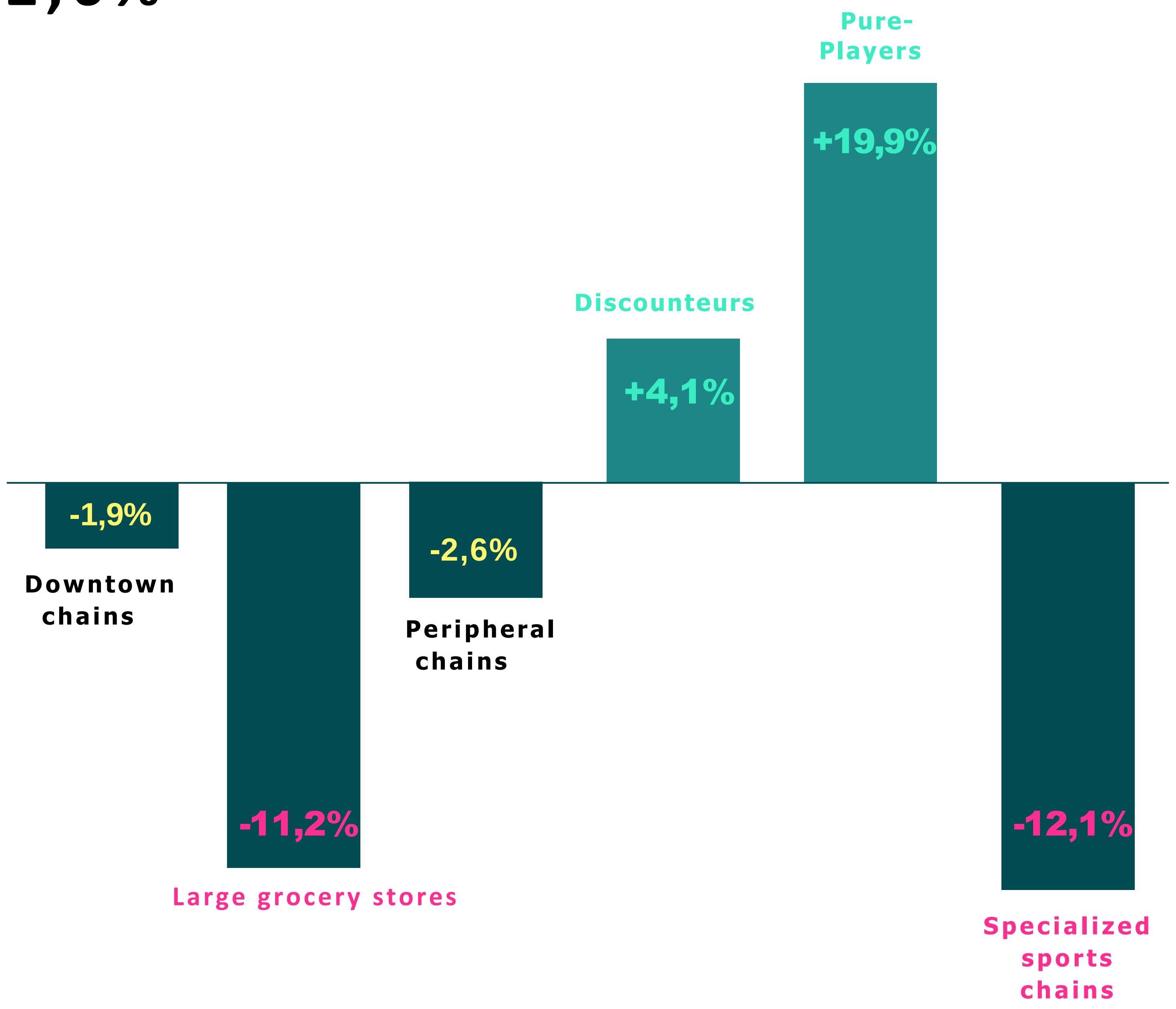
- For sports chains, nearly ***6 out of 10 items*** sold are underwear/hosiery, t-shirts, or sneakers.

- Large grocery stores concentrate ***57%*** of their sales on underwear/hosiery.

Sales by distribution channel

Reminder of market decline

-2,6%



Data on the top 100 reporting groups, totaling 215 declarants

Key Insight: In France, pure-players have increased by +19.9% in 2023 compared to 2022.

Key facts

7

A focus on the entry-level segment

KANTAR

A preference for "affordable prices"

Context: In 2023, French consumers faced significant inflation (food, fashion), prompting them to make various trade-offs and changes in purchasing behavior.

Key facts :

In 2023, ***71%*** of purchases made by French consumers in textile and footwear were on entry-level products (priced below the market average).

French consumers show a preference for affordable prices regardless of their socio-economic category: ***20%*** of lower-income French individuals exclusively purchase entry-level products.

And this behavior is also found among ***10%*** of affluent consumers.

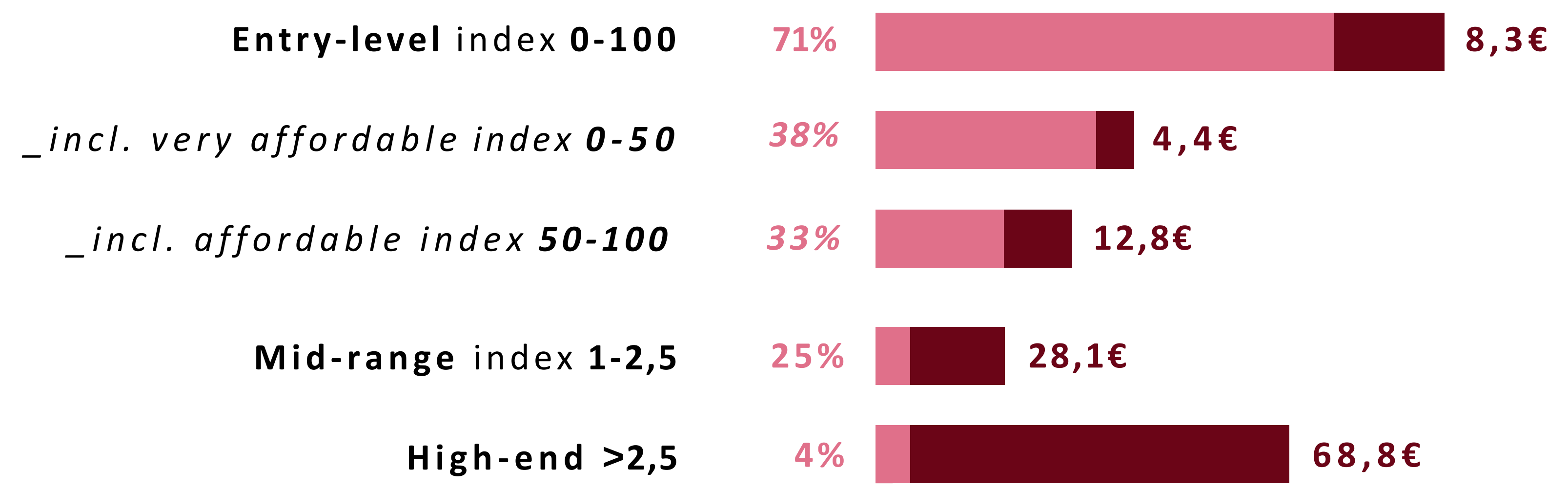
An affordable price offering that meets their need for simple products, which they also perceive to have a good value for money.

KANTAR

Distribution of purchase volumes by price range New products in 2023

Average purchase price of textile and footwear: **15,6€**

+3,4% compared to 2022 (15,1€)



A disproportionately high number of low-cost purchases in underwear and hosiery compared to ready-to-wear clothing.

Key facts :

French consumers predominantly purchase very affordable items in the underwear and hosiery markets (***54%*** of purchases at a price below ***50%*** of the market average), whereas this accounts for only ***30%*** in ready-to-wear clothing or ***25%*** in the sneaker market, for example.

KANTAR

Distribution of purchase volumes by price range New products in 2023

	READY-TO-WEAR	SNEAKERS	UNDERWEAR+ HOSIERY	ACCESSORIES
Entry-level index 0-100	66%	62%	81%	67%
_*incl. very affordable index* ***0-50***	*30%*	*26%*	*54%*	*38%*
_*incl. affordable index* ***50-100***	*36%*	*36%*	*27%*	*29%*
Mid-range index 1-2,5	28%	32%	15%	27%
High-end index >2,5	6%	6%	4%	7%

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Second-hand, an alternative to new?

Key facts :

Overall, the increase in purchases of second-hand textile ***does not offset the decline in new purchases.***

However, regular buyers of ***second-hand fashion*** (13%) tended in 2023 to increase their purchases of second-hand items, at the expense of new ones, across both adult and children's categories.

For French regular buyers of second-hand fashion, second-hand items represent 16% of their purchases.

KANTAR

Evolution of purchases of second-hand textile and footwear

+11% in customers buying second-hand in 2023 compared to 2022

Share of second-hand in the overall volume of textile and footwear purchases:

- **4%** of purchases in France
- **7%** of purchases in ready-to-wear

To conclude...

A decrease of 86 million new units put on the market in 2023... equivalent to 3 fewer new items every second.

A decrease of -5.1% for underwear/hosiery and -6.5% for t-shirts. And... an increase of +57% for suits.

A growing market for household linen (+2.6%).

3.2 billion

sales of new textile and footwear

Growth of pure-players (19.9%) and discounters (4.1%).

Intentional or forced deconsumption?
20% of French people report having already reduced their consumption out of conviction, concerned about the environmental impact of the textile industry.

Source Kantar - who cares whoe does ?

A *first barometer* to monitor the French market for textile and footwear over time.

A key understanding to mobilize professionals and citizens towards *reducing the environmental impacts* of textile and footwear throughout their lifecycle.

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