ELLEN MACARTHUR FOUNDATION

THE CUSTOMER IS YOUR NEW SUPPLIER

TURNING CLEAR-OUTS INTO OPPORTUNITIES FOR RESALE AND REMAKING

THE FASHION REMODEL



ABOUT

This report, written for decision makers, is part of The Fashion ReModel project, led by the Ellen MacArthur Foundation. It examines why the clothes, footwear, bags, and accessories customers clear out of their wardrobes do not convert into predictable, high-quality second-hand supply for businesses in resale and remaking. The report concludes with some recommendations for businesses and policymakers.

INDUSTRY SCOPE

The report focuses on resale and remaking business models for the following post-consumer items:

- Clothing, except for underwear (e.g. bras, socks, and underwear)
- Accessories such as hats, scarves, and belts (excluding accessories such as jewellery or eye/hair accessories)
- Footwear
- Handbags, purses, wallets, and small leather goods

DEFINITIONS

- **Resale** involves selling and buying second-hand items on managed marketplaces, brand-led recommerce online and in-store, peer-to-peer resale platforms, and at charity or thrift stores.
- **Remaking**, also known as remanufacturing, involves bringing post-consumer items and materials back into reusable condition through activities such as refurbishment, redyeing, and upcycling.

OUT OF SCOPE

- Returns and unsold items

PROJECT SCOPE

The Ellen MacArthur Foundation would like to thank Accenture UK and its team for their role in the survey design, distribution, and preliminary analysis.

The survey was distributed by Accenture UK between April and May 2026. One survey was translated and tailored to local channels – distributed to a representative sample (4,000 total, 1,000 per market) across California, China, France and the United Kingdom. Designed to understand what people did with their unwanted items over a 12-month period, the surveys involved multiple-choice questions and reaction time testing. The actions people took after clear-outs included taking their items to textile collection banks, donating them, trading them in, reselling them online, and disposing of them in household bins. The survey also included questions about motivations and what people thought about the options available.

To better understand how the challenges and opportunities businesses face in scaling supply for resale and remaking, the Foundation conducted in-depth interviews with C-suite executives, circular economy managers, circular founders, and subject matter experts from over 20 organisations in the private and public sector.

In the analysis and recommendations, this report draws on the EAST Framework by Behavioural Insights Ltd, licensed under CC BY-NC-SA 4.0.

GEOGRAPHICAL SCOPE

This report largely focuses on privately managed collection in high-consumption markets. We recognise the paramountcy of a just transition, and acknowledge the disproportionate burden of waste management on collectors, sorters, and informal workers in importing countries.

THE FASHION REMODEL

The Fashion ReModel is a project with a shared focus on what it will take to decouple revenue from resource extraction and implement circular business models at scale. The project works with brands, platforms, and retailers across the high-end, activewear, mid-range and mass markets.

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The Foundation would like to thank the following individuals for offering their expertise and input to this report.

The full list of contributors will be released at a later date.

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CONTENTS

	Executive summary	05
	Market selection	07
Section one	When, why, and how customers clear out their wardrobes	08
Section two	What it will take to scale predictable, high-quality supply	27
	Acknowledgements	37
	Glossary	38
	Appendices	39
	Endnotes	45
	Disclaimer and confidentiality	47

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EXECUTIVE SUMMARY



Second-hand fashion is becoming a market driver. Set to reach USD 393 billion by 2030, the global second-hand apparel market is growing over twice as fast as the overall apparel market.[1] Remaking is gaining similar traction, with the upcycling market specifically projected to grow from USD 9.78 billion in 2026 to over USD 19 billion by 2034.[2] As more customers break away from first-hand fashion, resale and remaking have emerged as a twofold opportunity to win customer loyalty and build resilience to global economic headwinds.[3]

Resale and remaking are an opportunity to generate revenue without the extraction of virgin materials, but businesses lack access to high-quality, predictable, second-hand items. Between 2000 and 2015, clothing production doubled while the number of times a clothing item was worn before disposal decreased by 36%.[4] Today, billions of clothes, accessories, and shoes around the world are either unworn or prematurely discarded. How can it be that more items exist than ever before, but the businesses trying to keep clothes in use cannot secure supply?

Across California, China, France, and the United Kingdom, we found that 9 in 10 customers clear out their wardrobes once a year, and over half of the items being cleared out in the last year were in new, good, or very good condition. The wardrobe clear-out is where the customer decides whether each unwanted item gets a second life, including via donation, online resale, textile collection banks, sharing with family and friends, remaking, brand or retailer item buyback. Customers are motivated by convenience, trust, and incentive, so the diversity of options likely reaches more customers and items than a single channel could reach alone. At the same time, as many as 51% of customers said they placed at least one item in the household waste bin and 28% said they placed at least one item in an undecided pile. **Customers have never before had so many options to direct their items to reuse, but there are still huge volumes of items going unworn or leaking out of the system.**

Today's ceiling on predictable, high-quality second-hand supply can be overcome. Brands and retailers are scaling their own models, resale platforms are gaining popularity, and Extended Producer Responsibility (EPR) is being adopted across multiple markets. At the same time, growing existing channels in isolation, such as online resale and donations, risks a fragmented landscape with the high-value reuse fraction of items diluted across all of them, and the very players that pioneered the second-hand market like the charity sector, are under huge strain. More coordination needs to focus on how a diversity of channels can coexist, complement each other, and deliver a circular economy for fashion and textiles.

Businesses have the chance to reimagine the customer relationship beyond a one-time interaction and play a role in designing a system that favours long-term resale and remaking over recycling or disposal. **The report outlines three recommendations for businesses:**

1 MAKE IT EASY, ATTRACTIVE, SOCIAL, AND TIMELY FOR CUSTOMERS TO KEEP ITEMS IN USE.

2 CREATE TARGETED PARTNERSHIPS TO REACH SUPPLY MORE EFFICIENTLY.

3 LEAD ON POLICY ADVOCACY EFFORTS FOR THE LONG-TERM ENABLING CONDITIONS FOR RECIRCULATION AT SCALE.

Acting on these recommendations can support resale and remaking to scale and realise the economic, environmental and social benefits of generating revenue without the production of new clothes. Businesses that act now can unlock customer loyalty, competitiveness, and long-term scale.



MARKET SELECTION

California, China, France, and the **United Kingdom (UK)** share four key characteristics: high levels of fashion consumption, high waste generation, high gross domestic product, and high second-hand market growth. They differ in policy and geography:

CALIFORNIA

Features a dense concentration of circular start-ups, established resale platforms, and specialised textile graders and sorters. California has been a leader in circular economy policy and industry, as the first US state with an Extended Producer Responsibility (EPR) law for textiles in place (SB 707).[5]

CHINA

Its second-hand clothing market is the fastest-growing in the world (14.4%).[6] Resale platforms have rapidly scaled in recent decades, including Xianyu (Idle Fish) and Taobao, and are used by millions of customers. In 2026, China released the 15th Five-Year Plan for Circular Economy Development.[7]

FRANCE

Consumer participation in resale is advanced, with 38% of citizens buying second-hand in 2023 (averaging 7.3 items per year).[8] France is home to the world's first textile EPR programme (since 2007), which was recently redesigned to include specific incentives for reuse and repair.

UNITED KINGDOM (UK)

Its resale sector is valued at more than GBP 7 billion, and around one in four fashion transactions result from resale.[9] The UK is in the early stages of exploring EPR for textiles, and WRAP has published an industry-backed Blueprint for UK Textiles EPR Scheme.[10]

WHEN, WHY, AND HOW CUSTOMERS CLEAR OUT THEIR WARDROBES

SECTION ONE

SECTION ONE

WHEN, WHY, AND HOW CUSTOMERS CLEAR OUT THEIR WARDROBES

The clothes, accessories, bags, and footwear in wardrobes change with seasons, living situations, and personal changes to body, style, and practical lifestyle. When an item may no longer be wanted by the customer, the clear-out moment holds an opportunity to keep that item in use. How regular those clear-outs are, what motivates the decision-making, and what holds items back from leaving the wardrobe are some of the first steps in understanding how customers become the suppliers of future resale and remaking offerings. This newfound understanding reshapes the traditional relationship a business has with its customers.

This section answers the following questions:

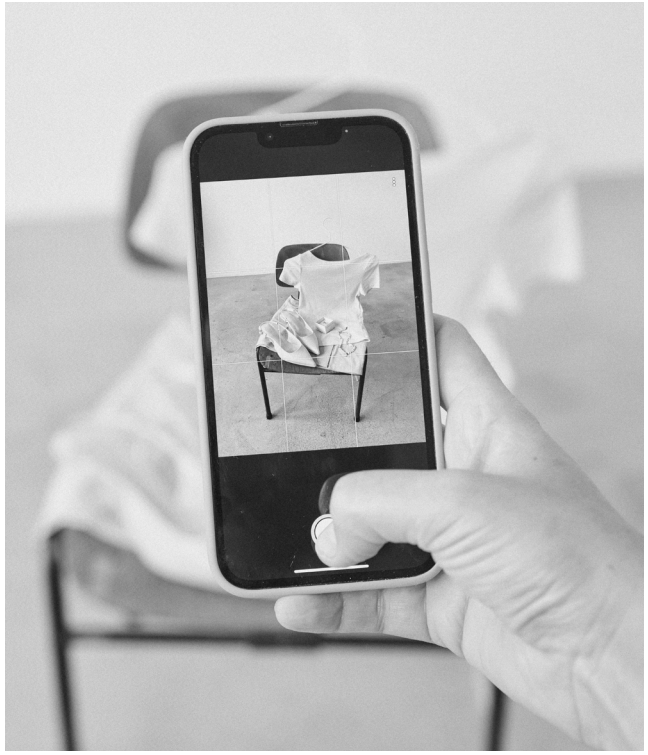
- **When do customers clear out their wardrobes and why?**
- **What is the condition of the items being cleared out?**
- **What do customers do with the items they clear out and why?**



WHEN DO CUSTOMERS CLEAR OUT THEIR WARDROBES AND WHY?

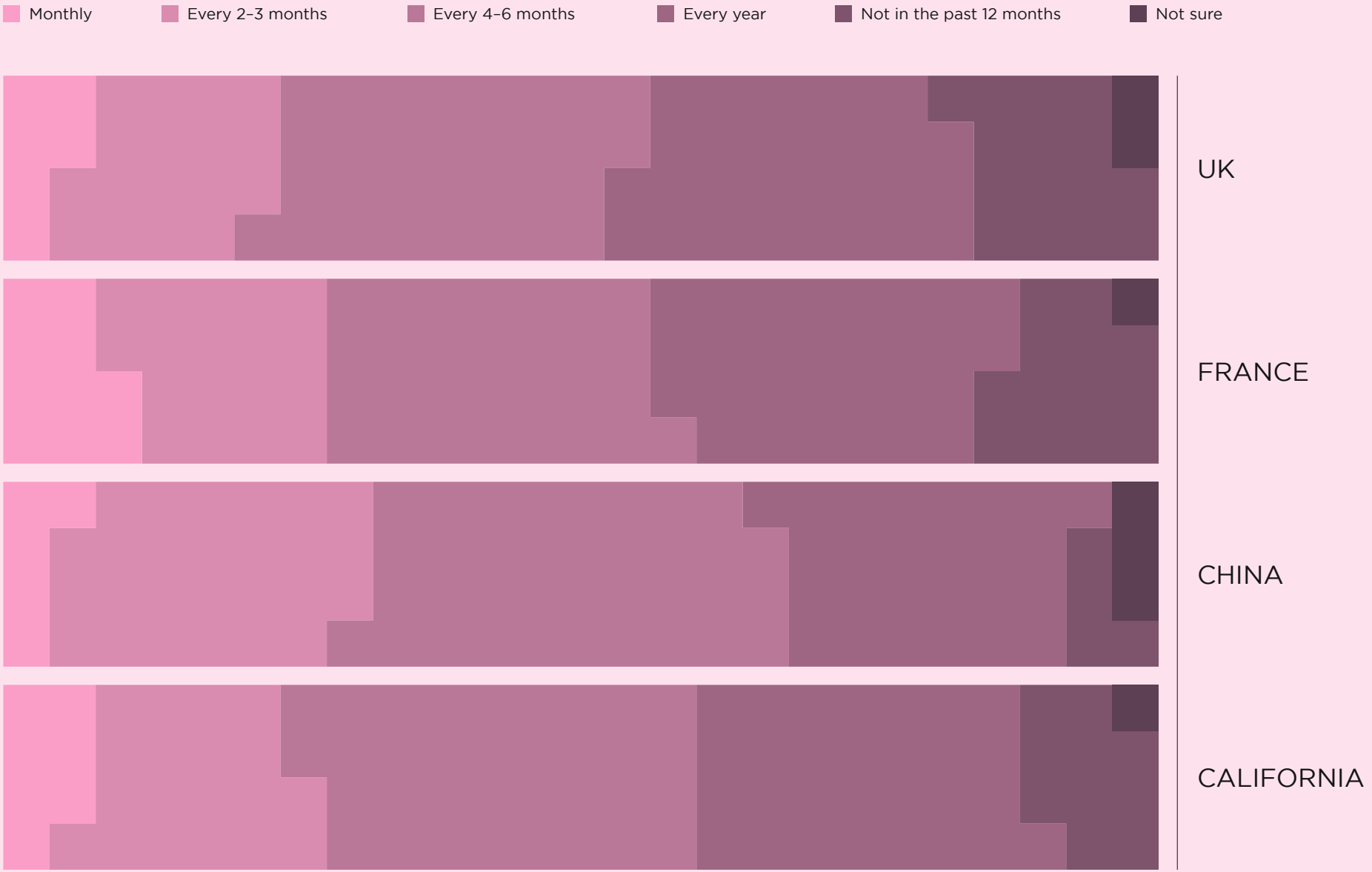
Across the four markets, 1 in 2 customers cleared out items at least twice in the past year, rising to 9 in 10 at least once a year.

More than seasonal changes or sustainability, space, downsizing, and making room for new purchases are the main motivations behind wardrobe clear-outs. Meanwhile, big life changes, such as moving house or a new job, may be a less frequent factor. Condition, fit, and how often an item is used play into the decision-making when a customer chooses whether to keep or clear out an item.



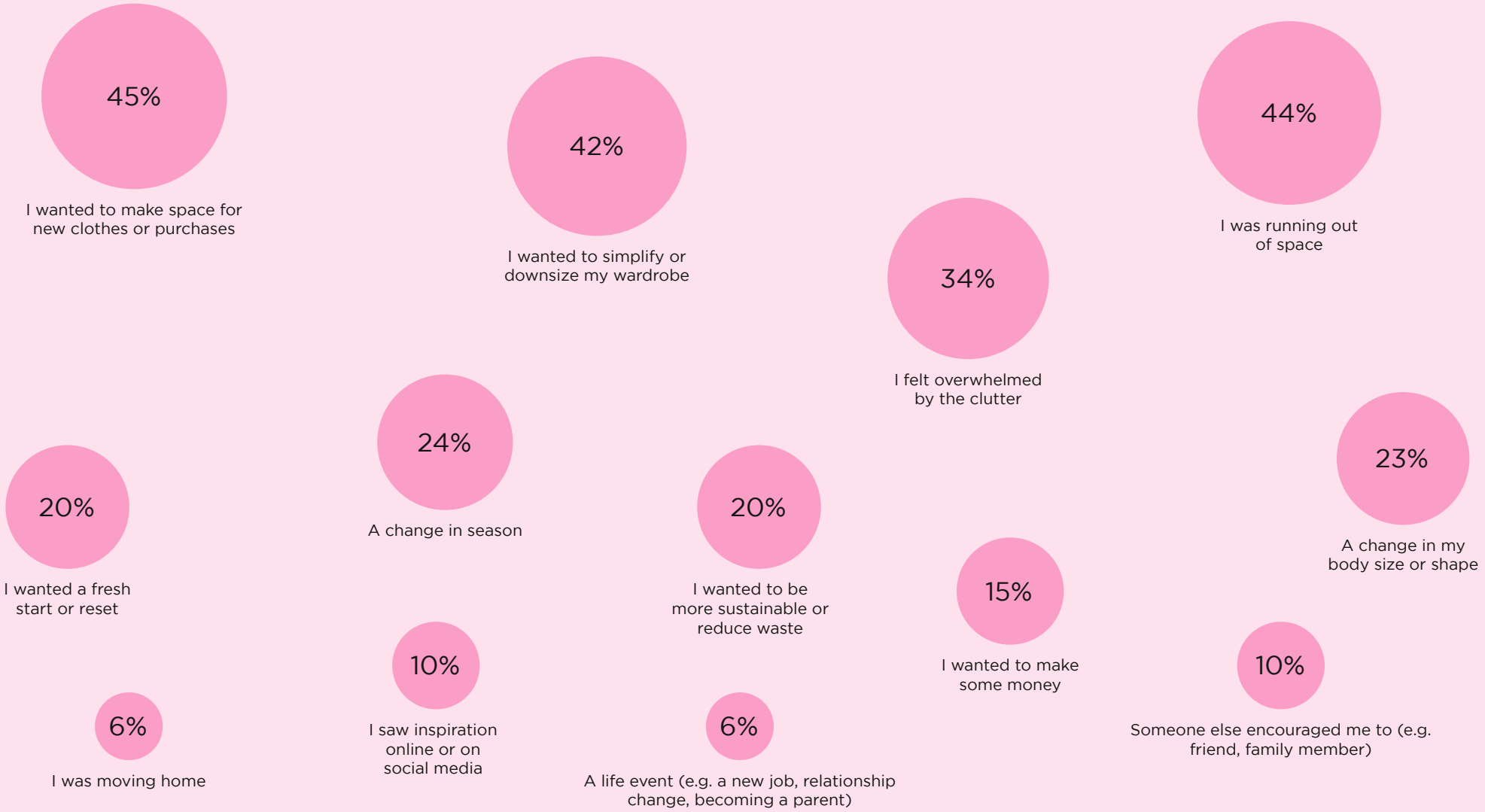
WARDROBE CLEAR-OUT FREQUENCY OVER 12 MONTHS

Percentage of respondents



CUSTOMER MOTIVATIONS FOR CLEARING OUT WARDROBES, AVERAGE ACROSS MARKETS

Percentage of respondents





A CIRCULAR ECONOMY PERSPECTIVE ON MOTIVATIONS

Making room for new purchases is one of the main reasons reported for why customers clear out their wardrobes. While the research did not include whether purchases took place before or after the clear-out, or if "new" purely meant new or also second-hand (new to that customer), there are some opportunities and risks to a circular economy from newness as a primary motivation.

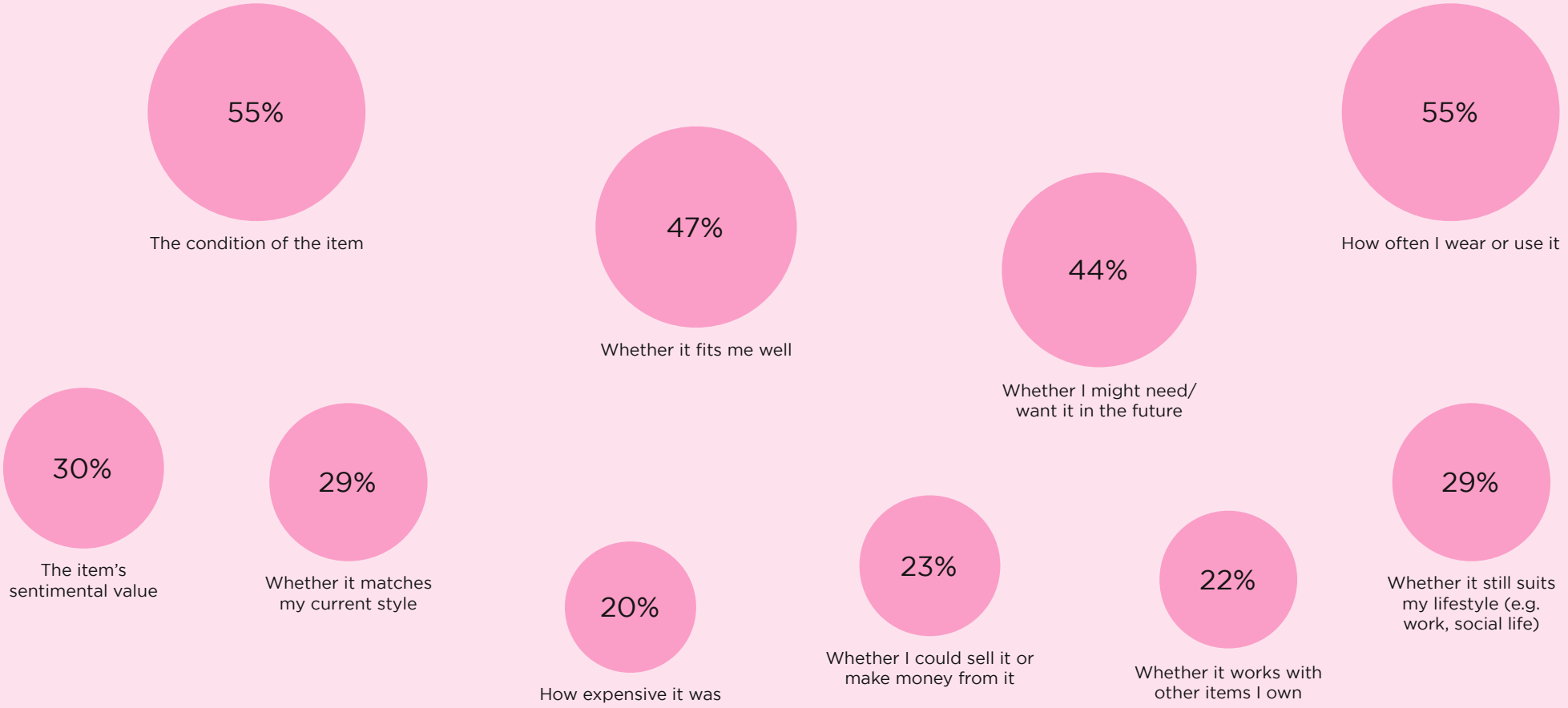
Opportunity: More customers than ever before are choosing second-hand and browsing resale before buying new, particularly Gen Z and millennials.[11] These types of purchases can support growth decoupled from the use of virgin materials.

Risk: Encouraging clear-outs, which creates more secondhand supply, could increase overall virgin material use and move the industry further away from a circular economy.[12] Strategies that speed up the customer cycle of clearing out and buying new, such as vouchers for new items or campaigns promoting clear-outs, could speed up how quickly items leave wardrobes, including items that may have been worn again by the original customer.

Action: Direct 'new' purchases to rental, repair, resale and remaking, alongside broader marketing and communications to reframe the narrative of newness.[13]

CUSTOMER MOTIVATIONS FOR CLEARING OUT A SPECIFIC ITEM, AVERAGE ACROSS MARKETS

Percentage of respondents



WHAT IS THE CONDITION OF THE ITEMS CUSTOMERS ARE CLEARING OUT?

Over half of the items cleared out were described by customers as either new, good, or in very good condition.[14]



CONDITION OF THE ITEMS BEING CLEARED OUT

Percentage of items



A CIRCULAR ECONOMY APPROACH TO GLOBAL TEXTILES WASTE

Most current business models are linear. They lead to high levels of throughput, low rates of utilisation, and low levels of recycling. While circular business models like resale offer an alternative to this, items that cannot be reused, such as those too damaged to be repaired, present an additional challenge.

Collection, sorting, and recycling infrastructure for textiles is limited in high-consumption markets. Items that cannot be domestically resold or recycled are often shipped abroad, frequently mixed with reusable items in bulk used-clothing exports. Many importing countries have limited capacity to sort, process, or dispose of these items, which typically leads to their being landfilled, burned, or dumped. Textile waste is causing a disproportionate burden of waste management on importing countries.[15] Keeping products in use for as long as possible through upstream product design, as well as downstream end-of-life solutions such as separate collection infrastructure (funded by EPR), is paramount to accelerating a just transition to a circular economy for fashion and textiles.



Customers clear out items through the most convenient, trusted, and rewarding channels.

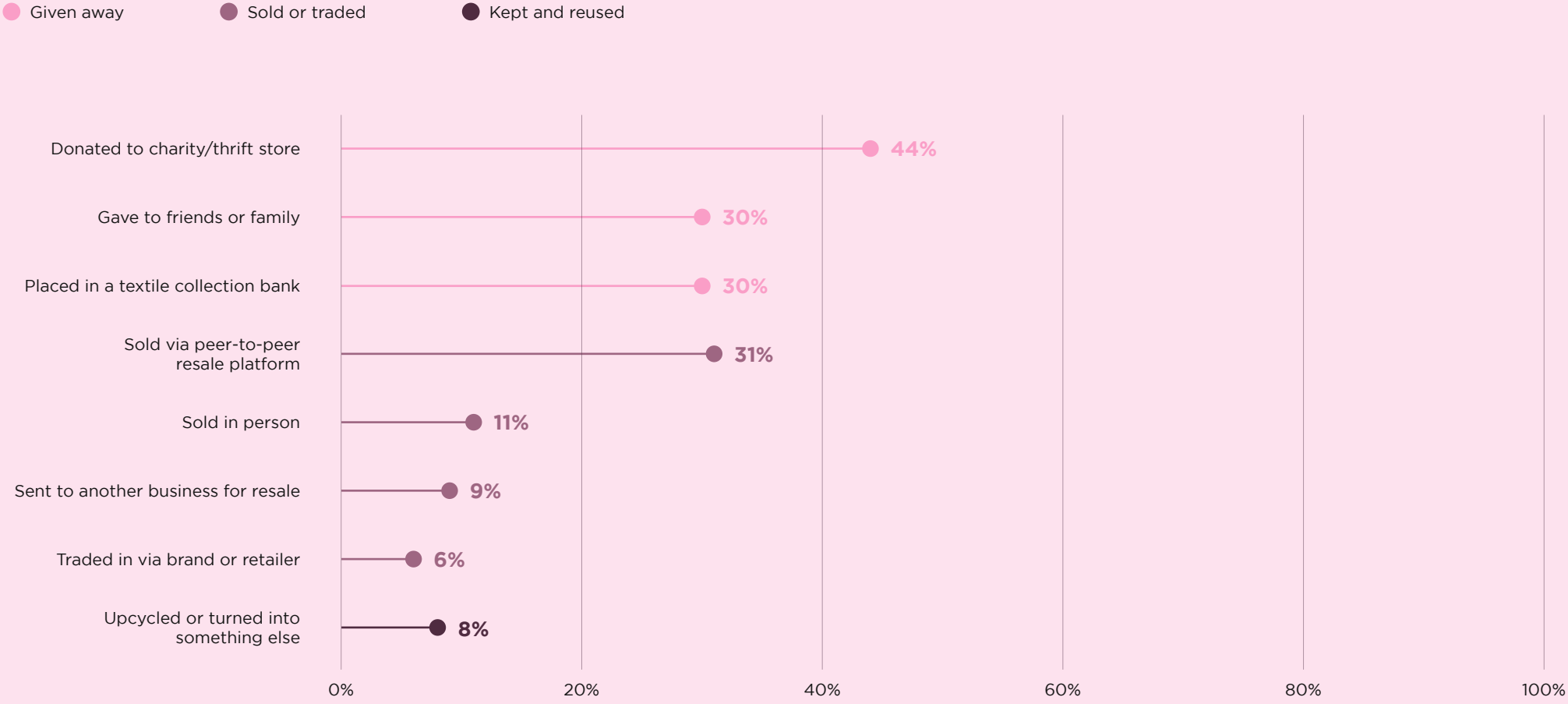
In California and the United Kingdom, donation is the top choice, motivated by altruism and trust, while textile collection banks are the top choice in China and France, motivated by the ease of the process. But habits are also changing alongside the digital transformation. Selling items via peer-to-peer platforms is gaining momentum, particularly in France and among younger generations. In France, Gen Z and Millennials selling items using peer-to-peer platforms rose to 52% and 51%, respectively, compared to 39% and 24% for Gen X and Boomers. Across all demographics, customers are more likely to resell when the items are in good condition and when they understand the selling process.

Items that remain unused or end up in the household waste bin could be missed revenue. Up to 51% of customers have self-reported placing at least one item in the household waste bin and up to 28% in an undecided pile. In France, fewer customers reported placing items in the household waste bin (17%) or undecided pile (15%), which is potentially tied to EPR, funding and coordinating textile collection banks (over 47,000 nationwide, with an average of one collection point within 3.4km of each French citizen).[16]

Environmental concerns alone do not shift customer behaviour. Customers clearing out their wardrobes balance environmental concerns, trust, convenience, and item condition.

WHERE CUSTOMER CLEAR-OUTS SUPPORT REUSE

Percentage of respondents, weighted by item type (clothing, footwear, accessories, and bags). Refer to page 43 of the Appendices for the item-level breakdown per market.



WHAT CUSTOMERS DO WITH THEIR CLEARED OUT ITEMS

Percentage of respondents, weighted by demographic group (Gen Z, Millennials, Gen X, and Boomers, agnostic to item type). Refer to page 44 of the Appendices for the demographic-level breakdown per market.



UK — TOP SIX REASONS FOR CHOOSING EACH ROUTE

Every route's top six reasons on one grid. Darker cells are stronger responses. A blank cell means the reason did not make that route's top six — not that nobody gave it.

	TRADED IN VIA BRAND OR RETAILER	SOLD ONLINE OR IN-PERSON	SENT TO A BUSINESS TO SELL ON THE CUSTOMER'S BEHALF	DONATED TO CHARITY/ THRIFT STORE	GAVE TO FRIENDS OR FAMILY	PLACED IN A TEXTILE COLLECTION BANK
	n=94	*n=300*	*n=97*	*n=610*	*n=266*	*n=240*
I wanted to reduce waste		28%		35%	25%	43%
Felt good knowing someone else could use it	32%	35%	36%			
The process was easy	30%					48%
The amount of money I expected to receive	29%	39%				
The item's condition (e.g. like new)		38%	30%			
App or platform is easy to use		34%	30%			
I wanted to clear space quickly				33%		30%
The type of brand (luxury, premium, high-street)	32%		32%			
ONE ROUTE ONLY						
I trust the brand or retailer	30%					
I've had a smooth experience trading before	30%					
I have sold items before		42%				
I wanted to be more sustainable			35%			
I expected the items to sell quickly			32%			
Helps people in need				55%		
Supports a cause I care about				43%		
I trust the charity to handle items responsibly				40%		
Easy drop-off or collection				39%		
I know they liked the item					51%	
Knowing the item would still be used or worn					46%	
Helping someone I know					41%	
It was convenient (e.g. easy to pass it on in person)					34%	
The person needed it (e.g. size, occasion, lifestyle)					31%	
Knowing the item would be recycled or repurposed						47%
Item worn or damaged, not suitable to sell or donate						43%
It felt like the right thing to do						33%

FRANCE — TOP SIX REASONS FOR CHOOSING EACH ROUTE

Every route's top six reasons on one grid. Darker cells are stronger responses. A blank cell means the reason did not make that route's top six — not that nobody gave it.

	TRADED IN VIA BRAND OR RETAILER	SOLD ONLINE OR IN-PERSON	SENT TO A BUSINESS TO SELL ON THE CUSTOMER'S BEHALF	DONATED TO CHARITY/ THRIFT STORE	GAVE TO FRIENDS OR FAMILY	PLACED IN A TEXTILE COLLECTION BANK
	n=54	*n=402*	*n=43*	*n=272*	*n=261*	*n=419*
I wanted to clear space quickly	24%			37%	26%	31%
I wanted to reduce waste	21%		28%	21%		27%
The process was easy	32%					46%
App or platform is easy to use		29%	38%			
The item's condition (e.g. like new)		36%	31%			
Felt good knowing someone else could use it		32%	27%			
ONE ROUTE ONLY						
Brand of the item	31%					
I trust the brand or retailer	24%					
I wanted to receive a store voucher	20%					
I have sold items before		44%				
The amount of money I expected to receive		33%				
I expected the items to sell quickly		22%				
Original price I paid for it			28%			
I have sent items to a business to sell before			26%			
Helps people in need				55%		
Supports a cause I care about				41%		
Easy drop-off or collection				41%		
I trust the charity to handle items responsibly				27%		
I know they liked the item					45%	
Helping someone I know					44%	
Knowing the item would still be used or worn					37%	
It was convenient (e.g. easy to pass it on in person)					35%	
The person needed it (e.g. size, occasion, lifestyle)					29%	
It felt like the right thing to do						50%
Knowing the item would be recycled or repurposed						49%
Item worn or damaged, not suitable to sell or donate						29%

CHINA — TOP SIX REASONS FOR CHOOSING EACH ROUTE

Every route's top six reasons on one grid. Darker cells are stronger responses. A blank cell means the reason did not make that route's top six — not that nobody gave it.

	TRADED IN VIA BRAND OR RETAILER *n=183*	SOLD ONLINE OR IN-PERSON *n=403*	SENT TO A BUSINESS TO SELL ON THE CUSTOMER'S BEHALF *n=124*	DONATED TO CHARITY/ THRIFT STORE *n=340*	GAVE TO FRIENDS OR FAMILY *n=473*	PLACED IN A TEXTILE COLLECTION BANK *n=629*
I wanted to reduce waste	33%	48%		45%	36%	39%
I wanted to be more sustainable	39%	35%	43%	38%		
The item's condition (e.g. like new)	39%	56%	42%			
The amount of money I expected to receive		34%	41%			
It felt good knowing someone else could use it		34%	41%			
The process was easy	35%					39%
App or platform is easy to use		33%	38%			
I wanted to clear space quickly				33%		38%
ONE ROUTE ONLY						
I trust the brand or retailer	37%					
The type of brand (e.g. luxury, premium, high-street)	33%					
I expected the items to sell quickly			34%			
Helps people in need				57%		
I trust the charity to handle items responsibly				52%		
Supports a cause I care about				28%		
The person needed it (e.g. size, occasion, lifestyle)					51%	
Knowing the item would still be used or worn					45%	
It was convenient (e.g. easy to pass it on in person)					34%	
I know they liked the item					33%	
Keeps sentimental items 'in the family'					31%	
Knowing the item would be recycled or repurposed						48%
It felt like the right thing to do						37%
Item worn or damaged, not suitable to sell or donate						34%

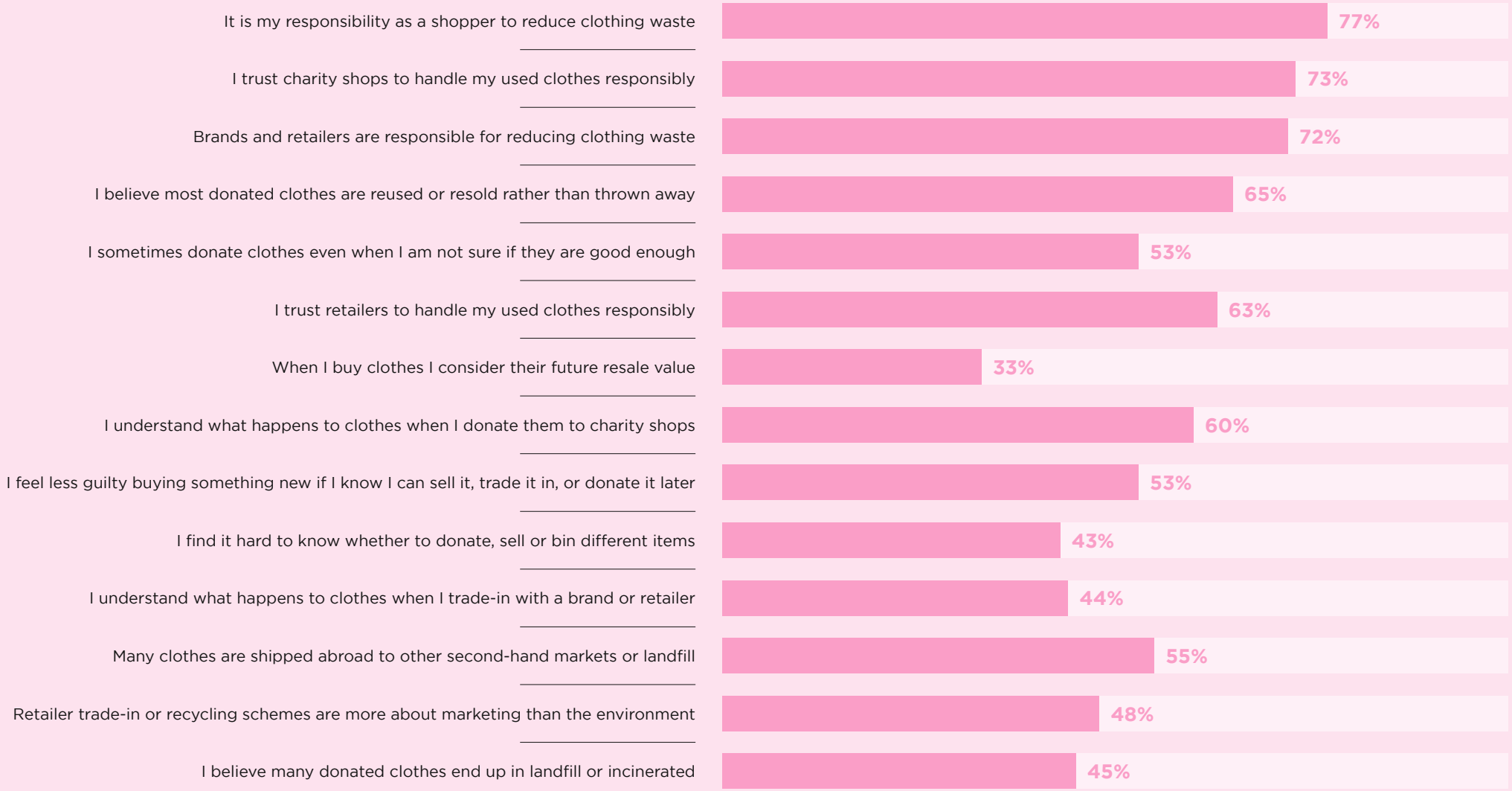
CALIFORNIA — TOP SIX REASONS FOR CHOOSING EACH ROUTE

Every route's top six reasons on one grid. Darker cells are stronger responses. A blank cell means the reason did not make that route's top six — not that nobody gave it.

	TRADED IN VIA BRAND OR RETAILER	SOLD ONLINE OR IN-PERSON	SENT TO A BUSINESS TO SELL ON THE CUSTOMER'S BEHALF	DONATED TO CHARITY/ THRIFT STORE	GAVE TO FRIENDS OR FAMILY	PLACED IN A TEXTILE COLLECTION BANK
	n=113	*n=284*	*n=121*	*n=673*	*n=441*	*n=197*
I wanted to reduce waste	35%			38%	25%	47%
I wanted to clear space quickly	33%			40%		40%
It felt good knowing someone else could use it	35%	39%	38%			
The process was easy	34%					45%
The item's condition (e.g. like new)		38%	41%			
App or platform is easy to use		33%	33%			
ONE ROUTE ONLY						
I trust the brand or retailer	42%					
I had a smooth experience trading items before	33%					
I have sold items before		47%				
I expected the items to sell quickly		36%				
The amount of money I expected to receive		35%				
I have sent items to a business to sell before			40%			
Time and effort required to sell it			36%			
The type of brand (e.g. luxury, premium, high-street)			33%			
Helps people in need				63%		
Easy drop-off or collection				57%		
Supports a cause I care about				34%		
Trust the charity to handle items responsibly				33%		
I know they liked the item					54%	
Knowing the item would still be used or worn					50%	
Helping someone I know					44%	
It was convenient (e.g., easy to pass it on in person)					37%	
The person needed it (e.g. size, occasion, lifestyle)					37%	
It felt like the right thing to do						45%
Knowing the item would be recycled or repurposed						39%
I wanted to be more sustainable						38%

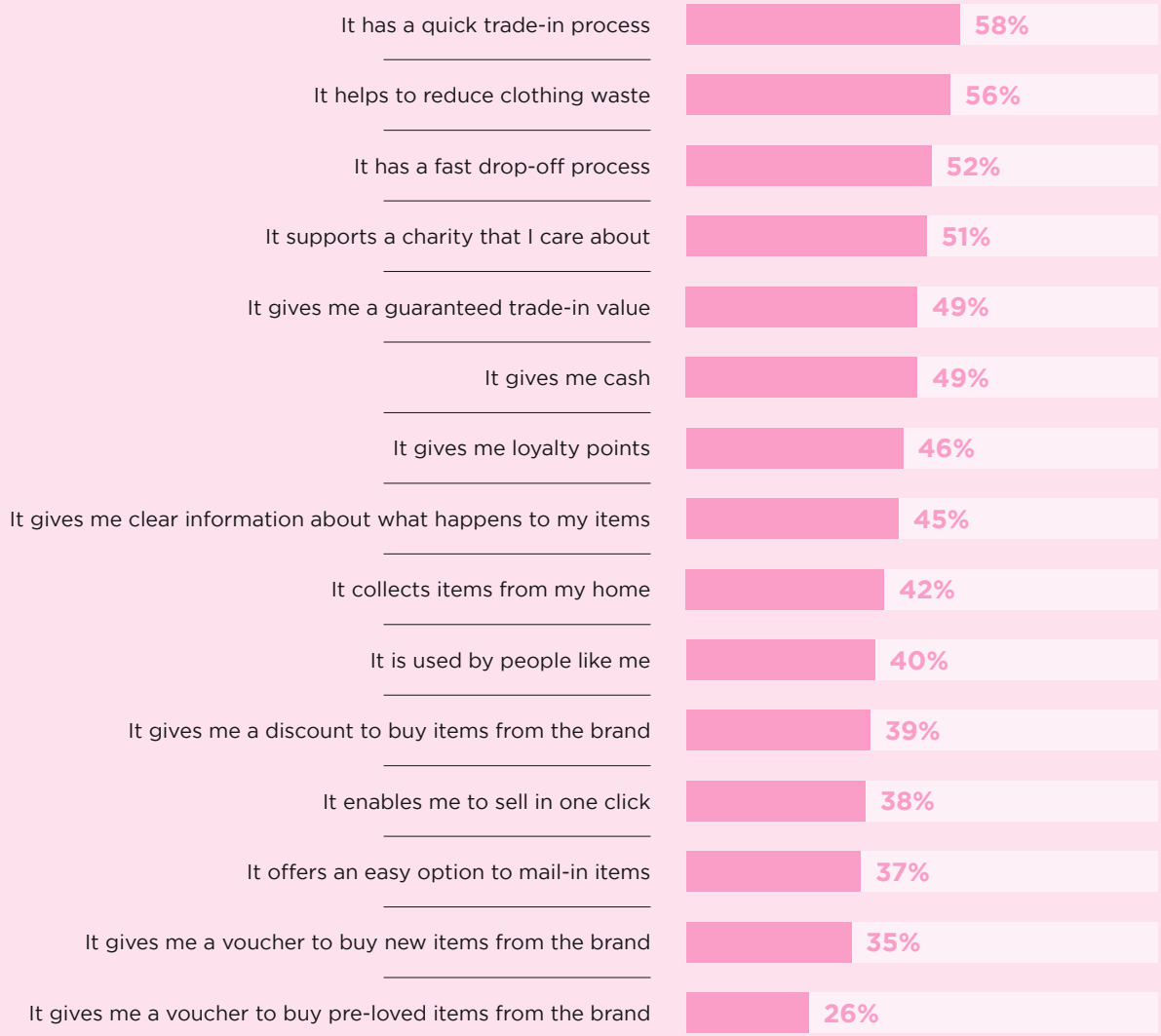
THOUGHTS, FEELINGS, AND ACTIONS SHAPING HOW CUSTOMERS CLEAR OUT WARDROBES

Percentage of respondents who agreed with the following statements



INCENTIVE RECEPTIVITY FOR BRAND AND RETAILER TRADE-IN SCHEMES

Percentage of respondents with a fast reaction time



REACTION TIME TESTING

Customers want quick trade-ins, fast drop-offs, lower waste, and higher charitable impact. When given a short time to answer, customers favoured reducing friction, having a demonstrable impact on society, and receiving monetary value for their items.[17]

Implicit reaction time testing measures the emotional conviction behind responses and better predicts behaviour. Fast reaction times facilitate unconscious decision-making processes and may contradict more conscious decision-making in multiple-choice questions. The approach is based on the attitude accessibility paradigm, which shows the stronger an attitude is, the more accessible it is from memory, and the more likely it is to guide behaviour.[18]

WHAT IT WILL TAKE TO SCALE PREDICTABLE, HIGH-QUALITY SUPPLY

SECTION TWO

SECTION TWO

WHAT IT WILL TAKE TO SCALE PREDICTABLE, HIGH-QUALITY SUPPLY

To scale predictable, high-quality second-hand supply will involve addressing where the supply and value of items are being lost: items that customers keep despite the fact they may no longer use, need, or want them, or those that get placed in the household bin. At the same time, systems must be designed to prioritise keeping items in use through resale and remaking over recycling or disposal.

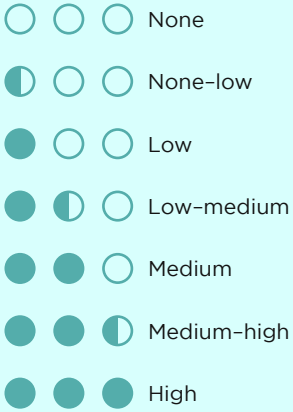


Today, each channel generates a different kind of supply.

Having more channels, including partnerships between them, likely reaches more customers and items than a single channel could do alone. Growing existing channels in isolation risks creating a fragmented landscape with the high-value reuse fraction of items, those that maintain a profit margin, diluted across all of them.



Convenience-led channels such as textile collection banks and donations often receive large and predictable volumes with a mixture of usable and unusable items. On the other hand, smaller volumes of higher-quality items are more typical of channels that require more effort from customers but equally offer more incentives, such as buy-back schemes in brand and retailer stores that can reach a brand or retailer's loyal customer base.



CHANNEL	CUSTOMER EFFORT	FINANCIAL INCENTIVE	VOLUME	QUALITY
Household bin	○ ○ ○	○ ○ ○	● ● ○	● ◐ ○
Sit in a pile to decide later	○ ○ ○	○ ○ ○	● ○ ○	● ● ○
Informal sharing	● ● ○	◐ ○ ○	● ● ○	● ● ◐
Textile collection bank	● ○ ○	○ ○ ○	● ● ●	● ◐ ○
Donation to charity/thrift	● ○ ○	○ ○ ○	● ● ●	● ● ○
Takeback	● ◐ ○	● ◐ ○	◐ ○ ○	● ◐ ○
Consignment resale	● ● ○	● ● ◐	● ○ ○	● ● ◐
Brand or retailer buy-back and trade-in	● ● ○	● ● ◐	◐ ○ ○	● ● ●
Peer-to-peer resale	● ● ●	● ● ●	● ● ○	● ● ◐

Note: *This illustrates the various channels customers send their unwanted items through, alongside the volumes and quality of the items each channel receives. Averaged across markets, the rankings are based on customer data and expert interviews. Businesses may operationally span multiple channels, and more research is needed to understand how channels scale or change over time.*

Customers behave similarly when clearing out their wardrobes, despite the different market contexts.

Businesses can design similar and targeted solutions to tap into the economic opportunity of the second-hand market faster. For example, to reach items that remain unworn or get placed in the household bin, and to build targeted partnerships, such as with third parties, charities, and online resale platforms.



Recommendation 1

Make it easy, attractive, social, and timely for customers to keep items in use.

Marketing and sales teams know their customers in more detail than ever before. How they shop, what incentives bring them in-store or online, and where to draw their attention towards second-hand instead of new. The EAST framework (make it easy, attractive, social and timely) is a popular framework developed by the Behavioural Insights Team, an independent organisation that branched out of the UK government.[19] With this framework, businesses can explore and measure whether these behaviours build the habits and loyalty that generate the predictability and quality needed to scale resale or remaking models.

Easy

Encouraging repeat participation from customers through convenient processes, including in-store, accessible drop-offs, seamless digital services, and simple messaging.

Examples:

- Instant resale, where customers can go to their original purchase history to resell items. Coach partners with Poshmark in the United States,[20] and Xianyu (Idle Fish) offers a similar feature for 300 million customers in China.[21]
- Simple messaging can help customers understand the condition that would be accepted without technical or complex language, Arc'teryx ReBIRD program uses the line 'if you'd give it to a friend, we'd probably accept it.'[22]

Attractive

Offering rewards for clear-outs, such as loyalty points or rewards, and providing reminders and frequent touchpoints with the customer beyond the initial point of purchase.

Examples:

- Cyclon, led by global premium sportswear brand On, combines free delivery and rewards for trading in used gear, whether in resellable condition or at end of life.[23]
- Sellpy, a European resale platform, offers an at-home solution, where customers place all items into one bag with pre-paid shipping and receive 40% of the sale price for EUR 50 or less, and 70% over EUR 50.[24]
- Decathlon's buy back scheme offers customers a gift card or bank transfer once items have been inspected in-store.[25]

Social

Reaching more customers through targeted campaigns, cultural and community moments, and providing transparent information that customers can understand and trust.

Examples:

- Goodwill Industries International has a network of local organisations that partner with brands, innovators, recyclers, and universities to reach more customers via nearly 4,500 collection points across the US and Canada, with proceeds directly benefiting local communities.[26]
- Cultural partnerships and celebrity influence can play a powerful role in shifting customers' perceptions and bringing resale into mainstream culture. For example, eBay UK's partnership with Love Island has helped champion pre-loved fashion to a mass audience, encouraging customers to embrace second-hand style and sell their items on eBay.[27]
- Appealing to the sense of community, especially with the popularity of informal sharing. The RealReal hosts National Consignment Day alongside luxury valuation events in its retail locations to make secondary selling aspirational and trusted, popular among millennials and Gen Z.

Timely

Maintaining regular customer touchpoints about what to do with unwanted items, such as through marketing campaigns and personalised offers and reminders for product categories in higher demand during certain seasons.

Examples:

- Targeted for lifestyle transition moments, such as Zalando's offering of pre-owned kidswear.[28]
- Timed for seasonal variations. Oxfam's Secondhand September promotes donation and purchasing second-hand items during the UK's autumn, when clear-outs are common as the seasons change. Interventions may also come before the clear-out itself, including repair or tailoring services and remaking opportunities that can keep an item in use.[29]
- ReLondon's Love Not Landfill campaign specifically targets younger generations (16–24) in London.[30]



APPLYING THE EAST FRAMEWORK

Behavioural testing and interventions could assess the impact of different factors for the quality, condition, and cadence of items:

- Different incentives, including cash, credit, and loyalty rewards
- Predictions of future trade-in values and personalised messaging
- Reminders aligned with demand modelling or forecasting

Their impact can be compared to customer acquisition, loyalty, and engagement, as outlined in the Foundation's Metrics for making the case for circular business models.[31] For more examples, see Visa's Recommerce Behavioural Insights Lab, which includes case studies from COS, Selfridges, Grover, Decathlon, and United Repair Centre.[32]

Recommendation 2

Create targeted partnerships to reach supply more efficiently.

To reach more customers and pool infrastructure for collection and return, businesses are leveraging partnerships with charities, platforms, tech providers, and collection providers in specific markets. For example, US brand Reformation and resale platform ThredUp offer the ThredUp Clean Out Kit, where customers receive a bag to send items to be resold.[33] To reach customers motivated by altruism, John Lewis Partnership are working with the Salvation Army Trading Company to offer customers a rental voucher in exchange for second-hand items.[34]

Remaking can redesign and restore items into resellable condition. To scale, businesses need a stable volume of the same type of post-consumer item, sorted and matched by fabric and colour, and a skilled workforce with the skills and expertise to take apart unwanted items and transform them into new products. Brands are showing that remaking is possible. For example, Coach has partnered with Bank & Vogue to create a Coach Repurposed Capsule and E.L.V. Denim partnered with Gabriela Hearst to bring two unique designs to market.[35] Largely, remaking remains a niche opportunity for premium items since product margins must include higher labour costs.





At scale, more items must be captured, collected, and kept in use by all players.

Charities and thrift players, brands and retailers, online resale platforms, textile collection providers, waste management service providers, and policymakers all play a role in designing a system that favours long-term resale and remaking over recycling or disposal. Long-lasting gains could be made by combining durable product design with infrastructure and markets for resale and remaking. However, there needs to be more research and coordination into how a diversity of channels can coexist, complement each other, and deliver a circular economy for fashion and textiles.[36]

Domestic and international collectors and sorters are handling growing volumes of non-reusable items and are increasingly operating at a loss.[37] Voluntary efforts, such as partnerships between businesses and charities, can deliver shared benefits, relieve the waste burden, and mitigate the risk of simply redistributing the percentage of items that already get collected and resold. Where voluntary business action reaches its limits, policymakers set the rules for risk mitigation and just transition processes. For instance, Parties to the Basel Convention are considering how to address used textiles and textile waste, including clearer definitions to distinguish textiles traded for reuse from waste.[38] Industry and other observers can inform this work through the Convention's formal calls for comments.

Governments can create the long-term enabling conditions for recirculation, including circular product design, infrastructure investment, and a comprehensive policy mix. Upstream, future design policy could also ensure items entering the market are designed to last and are suitable for reuse and repair. For example, the Ecodesign for Sustainable Products Regulation's Delegated Act for Textiles in the EU will include design requirements for textiles.[39] Downstream, where EPR exists or is being developed to fund the separate collection, sorting, reuse, and recycling systems for used textiles, it can build on and integrate existing systems and improve the economics for all actors in the global system.[40] California's SB 707 outlines that the producer responsibility organisation should partner with second-hand actors, such as thrift stores.[41] WRAP's industry-backed Blueprint for UK Textiles EPR Scheme outlines that any EPR scheme should acknowledge existing collection and takeback schemes.[10]

Recommendation 3

Lead on policy advocacy efforts for long-term enabling conditions for recirculation at scale.



Businesses that are scaling resale and remaking are best placed to share with policymakers what works and what holds them back, helping to create a level playing field where keeping clothes in use is rewarded rather than penalised. For example, in 2026, the Ellen MacArthur Foundation published a business statement with 70+ signatures calling for targeted policy action that can help circular business models scale.[42]

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GLOSSARY

BRAND AND RETAILER ITEM BUY-BACK AND TRADE-IN

Operationally similar to takeback but the reward (voucher, discount, cash) is based on the item's resale value.

CLEAR-OUT

Involves customers taking items from their wardrobes or home and deciding what to do with them next. Referred to as 'clear-out' as a noun.

CONSIGNMENT RESALE

A resale model where the customer (the consignor) sends an item to a business or platform (the consignee) to sell on their behalf, for a set period of time to either sell, be returned, donated, or sent for recycling. The customer gets paid after an item actually sells, e.g. Sellpy or The RealReal.

CUSTOMER EFFORT

The amount of physical or mental work a customer must put in when deciding where to put an item they no longer want, use or need.

DONATION AND THRIFT

Not-for-profit or community-based options like charity shops, yard sales, and clothing swaps. In France, known as Les Magasins Solidaires.

EXTENDED PRODUCER RESPONSIBILITY

As defined by the OECD, a policy approach in which a producer's responsibility for a product is extended to the post-consumer stage of the product's life cycle. Under EPR legislation, businesses that place products on the market ("obligated producers") become responsible for managing their products when these are discarded.

FINANCIAL INCENTIVE

The amount of money (cash, vouchers) or value a customer is expected to receive when deciding where to put an item they no longer want, use or need. For informal sharing, that incentive could be receiving a different item in exchange for an unwanted, unused or unneeded one.

HIGH-QUALITY

Referring to items businesses would deem in a reusable condition, subjective based on grading, condition, and remaking potential.

HIGH-VALUE REUSE FRACTION

Secondhand items that can be directly reused or resold, and therefore, maintaining a profit margin after the costs of collection, sorting, cleaning and shipping are taken into account.

INFORMAL SHARING

Customers non-commercially recirculate items with friends, family and others, often locally.

MANAGED RESALE

Refers to the operational process, where the business or platform centralises the logistics, cleaning, authentication, photography, and listing. Can include brand and retailer buy back, takeback and consignment models.

PEER-TO-PEER PLATFORMS

Transactions occurring directly between customers on an online marketplace offered by a business. These platforms provide varying levels of support for logistics, pricing, and authentication.

TAKEBACK

Customers provide items, in any condition, in-store or via mail-in options, sometimes for a small reward (voucher, discount, cash). Can include brand and retailer takeback or privately managed schemes.

TEXTILE COLLECTION BANKS

Oftentimes curbside containers in areas of high footfall. Items can be placed by customers and collected and treated by municipalities, charities, or businesses.

APPENDICES

DETAILED INSIGHTS AND TABLES

Which of the following, if any, prompted you to clear out clothes or accessories that you no longer needed or wanted?				
	UK	**FRANCE**	**CHINA**	**CALIFORNIA**
I wanted to make space for new clothes or purchases	40	41	52	48
I was running out of space	43	33	50	48
I wanted to simplify or downsize my wardrobe	35	40	53	38
I felt overwhelmed by the clutter	33	19	40	42
A change in season	17	17	39	23
A change in my body size or shape	23	21	22	27
I wanted to be more sustainable or reduce waste	19	14	29	19
I wanted a fresh start or reset	21	7	25	26
I wanted to make some money	17	25	6	13
I saw inspiration online or on social media	9	4	15	11
Someone else encouraged me to (e.g. friend, family member)	11	9	7	11
I was moving home	5	6	7	7
A life event (e.g. a new job, relationship change, becoming a parent)	6	2	9	7
Other (please specify)	3	3	0	2
Nothing in particular	2	3	1	2

Once you have identified clothes or accessories you no longer need or want, which of the following help you decide whether to keep them or pass them on?				
	UK	**FRANCE**	**CHINA**	**CALIFORNIA**
The condition of the item	54	52	51	62
How often I wear or use it	62	45	46	66
Whether it fits me well	53	36	40	60
Whether I might need/want it in the future	46	33	50	46
The item's sentimental value	27	25	38	31
Whether it matches my current style	26	26	35	29
Whether it still suits my lifestyle (e.g. work, social life)	25	20	36	35
Whether I could sell it or make money from it	21	27	25	18
Whether it works with other items I own	21	13	31	23
How expensive it was	18	17	23	21
Other (please specify)	0	1	0	5
Not sure	1	2	1	3

To what extent do you agree or disagree with the following statements?				
STATEMENT	**UK**	**FRANCE**	**CHINA**	**CALIFORNIA**
It is my responsibility as a shopper to reduce clothing waste	73	81	84	71
I trust charity shops to handle my used clothes responsibly	77	71	72	72
Brands and retailers are responsible for reducing clothing waste	68	79	81	61
I believe most donated clothes are reused or resold rather than thrown away	58	60	76	67
I sometimes donate clothes even when I am not sure if they are good enough	48	46	62	55
I trust retailers to handle my used clothes responsibly	59	59	67	66
When I buy clothes I consider their future resale value	29	28	47	29
I understand what happens to clothes when I donate them to charity shops	61	59	59	61
I feel less guilty buying something new if I know I can sell it trade it in or donate it later	46	49	69	48
I find it hard to know whether to donate sell or bin different items	39	42	48	41
I understand what happens to clothes when I trade-in with a brand or retailer	31	45	59	42
Many clothes are shipped abroad to other second-hand markets or landfill	53	71	46	50
Retailer trade-in or recycling schemes are more about marketing than the environment	48	54	46	45
I believe many donated clothes end up in landfill or incinerated	46	60	30	44

REACTION TIME TESTING

Incentives were tested using reaction time testing, based on the attitude accessibility paradigm (Fazio & William, 1986; Dovidio & Fazio, 1991; Fazio, 2001), which shows that the stronger an attitude is, the more accessible it is from memory, and more likely to guide behaviour.

Thinking about trade-in schemes offered by clothing or footwear brands or retailers, what would motivate you to use these schemes?				
INCENTIVE	**UK**	**FRANCE**	**CHINA**	**CALIFORNIA**
It has a quick trade-in process	54	55	61	60
It helps to reduce clothing waste	51	57	64	53
It has a fast drop-off process	50	34	67	56
It supports a charity that I care about	49	45	60	50
It gives me a guaranteed trade-in value	42	55	50	48
It gives me cash	51	49	42	53
It gives me loyalty points	46	40	52	47
It gives me clear information about what happens to my items	46	39	45	48
It collects items from my home	40	41	54	32
It is used by people like me	42	35	42	42
It gives me a discount to buy items from the brand	33	40	44	38
It enables me to sell in one click	37	38	42	33
It offers an easy option to mail-in items	27	31	56	32
It gives me a voucher to buy new items from the brand	33	39	34	34
It gives me a voucher to buy pre-loved items from the brand	23	28	30	23

Item type analysis: ***Thinking about any clothing/footwear/accessories/handbags you no longer wanted in the past 12 months, what did you do with them? If you have taken out multiple items, please select as many options as are relevant.***											
		Donated to charity/ thrift store	Sold (P2P platforms)	Gave to friends or family	Placed in a textile collection bank	Put in household waste bin	Put it in a pile to decide later	Traded in through a brand or retailer trade-in scheme	Upcycled or turned into something else	Sent to another business who sold it on my behalf	Sold in person
UK	CLOTHING	73	27	27	25	20	14	4	7	7	7
	FOOTWEAR	55	22	24	17	25	9	4	5	6	7
	ACCESSORIES	56	26	29	20	14	15	5	9	15	9
	BAGS	58	32	29	10	12	12	7	7	13	12
FRANCE	CLOTHING	31	39	29	49	12	11	4	7	4	13
	FOOTWEAR	22	39	16	40	17	10	4	4	3	11
	ACCESSORIES	19	47	25	30	14	13	7	6	9	9
	BAGS	20	52	19	21	8	8	6	3	5	5
CHINA	CLOTHING	33	31	40	67	38	18	7	15	7	9
	FOOTWEAR	22	24	26	55	49	11	6	6	7	8
	ACCESSORIES	31	33	43	53	31	15	6	17	11	12
	BAGS	25	44	46	36	35	15	8	15	12	11
CALIFORNIA	CLOTHING	73	17	40	17	24	21	8	9	9	15
	FOOTWEAR	61	13	28	12	27	12	7	4	6	10
	ACCESSORIES	65	22	21	14	18	20	11	9	12	18
	BAGS	64	23	38	11	14	13	9	9	12	16

Demographic analysis: ***Thinking about any clothing/footwear/accessories/handbags you no longer wanted in the past 12 months, what did you do with them? If you have taken out multiple items, please select as many options as are relevant.***											
		Donated to charity/ thrift store	Sold (P2P platforms)	Gave to friends or family	Placed in a textile collection bank	Put in household waste bin	Put it in a pile to decide later	Traded in through a brand or retailer trade-in scheme	Upcycled or turned into something else	Sent to another business who sold it on my behalf	Sold in person
UK	GEN Z	62	50	53	16	22	21	17	13	21	21
	MILLENNIALS	66	40	42	33	34	25	21	20	20	15
	GEN X	78	24	19	34	24	14	6	4	5	8
	BOOMERS	88	10	17	27	24	13	0	2	1	2
FRANCE	GEN Z	32	52	37	29	17	21	14	15	11	27
	MILLENNIALS	26	51	35	46	18	13	8	8	8	16
	GEN X	32	39	27	55	16	13	4	7	2	13
	BOOMERS	41	24	27	63	17	11	2	7	1	8
CHINA	GEN Z	34	46	50	62	55	33	8	23	16	16
	MILLENNIALS	32	51	55	69	46	24	11	13	12	15
	GEN X	36	24	47	77	56	18	6	21	10	13
	BOOMERS	57	20	52	64	46	18	9	34	21	20
CALIFORNIA	GEN Z	64	33	60	14	31	39	5	18	16	26
	MILLENNIALS	71	33	60	36	41	34	9	19	23	27
	GEN X	78	15	43	16	29	22	2	7	7	14
	BOOMERS	90	4	34	14	32	16	1	5	3	11

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