

A Study on the Global Scenario of Pre-owned Apparel Market

By

Vanshika Bansal

Amity School of Fashion Technology , Amity University, Noida ,Uttar Pradesh, India.

Email: vanshikabansal8896@gmail.com

Pradeep Joshi

Amity School of Fashion Technology , Amity University, Noida ,Uttar Pradesh, India.

Abstract

Consumption of pre-owned garments is an inexorable worldwide phenomenon that is considerably rising. Almost everywhere in the globe, the garment business has been greatly impacted by this tendency. Enhancing garment lifespans is essential for minimizing the overall environmental effects. As a result, it's crucial to focus on the elements that make buying used apparel better. Repurposing any clothing that has previously been used by someone else is denoted as wearing pre-owned clothing. Most of the garments will be donated rather than tossed in the trash. The research examines the balancing of pre-owned garments imports and exports among under developing and developed nations and presents it as the import-export trade in used apparel for the years 2010 through 2020. The largest market for pre-owned garment import and export volume is Africa and China respectively. Additionally, this study sought to explore the influence of customer perspectives, market circumstances, the developing trend of utilizing the circular economy while making purchases, and environmental issues. The prior scholarly publications from different fields were gathered, and their ideas were evaluated. Given the rising interest in the pre-owned garment, this study improves the understanding of the phenomena. Knowing more about the typical use of pre-owned garments will be fascinating for marketers, customers, and social activists advocating sustainability in the fashion industry.

Keywords: Pre-owned Garments, Export and Import, Consumer behavior, Environmental concern, Circular economy.

1. Introduction

All through the decades, the use of clothing has increased all across the globe, mostly as a result of rapidly changing styles and the availability of lower-quality clothing. As a result, consumers in the developed world now own more clothing than they need since trends change quickly. They throw off outgrown, outdated, or worn-out clothing as rubbish, donate it to charity or dispose of it for recycling because they can easily afford to purchase new items. This has led to an immensely greater supply than there is demand, necessitating the interchange of clothing as gifts to developing countries. To the donors' astonishment, moreover, their clothing is not simply given to those in need; instead, it is sold in local marketplaces in the industrialized regions, with 70% of all donations going to Africa. The majority of emerging economies imported 30,000 tonnes or more of pre-owned garments annually. This has not only intentionally destroyed the textile industry and turned the households into garbage dumps. The importing of pre-owned garment apparel from Europe and America as well as cheap clothing and textiles from Asian nations provide substantial problems for the textile industry. Additionally, it is believed that manufacturers encounter intense competition from surplus garment imports that are rejected by European charity shops and cheaper clothing and textiles from Asia, particularly China as well as Indonesia, and from America. These are all effects of

the textile and apparel industry's global economic growth[1].

According to Laitala[2], individuals own an increasing number of clothes in Norway and numerous other wealthy nations. Due to the high volume, consumers often have more goods than they have the time of using, resulting in a lot of these items being mostly unworn. In the same period, studies and enthusiasm for reusing and recycling have grown[3]. The market-based economy's commercial and ideological solutions have received the majority of attention thus far. It has been customary for ages to purchase and sell used products[4]. According to Davis[5], some European countries have a long history of using pre-owned garment goods. In the United Kingdom, for instance, buying used or pre-owned goods is a practice with a strong social foundation. Moreover, individuals from several nations, like France and Spain have aggressively entered the pre-owned garment market owing to economic considerations, with an emphasis on the recent financial crisis. With the aid of much research the study identified that consumers' buying patterns are altering and that the demand for used items is rising. Moreover, 28% of UK consumers had purchased something in a charity shop and almost 40% of UK consumers were directly engaged in the pre-owned garment market [6]. The selling of used goods has also expanded significantly during the past 20 years in France. According to Guiot[7], 50.7% of Spanish adults (or 22 million consumers) shop at pre-owned clothing stores. Similar to how it is in the USA, buying used goods is a highly well-known commercial activity there as well. Examples include auctions, flea markets, and antique shops. Figure 1 depicts the pre-owned garment consumption rate during the years 2010 to 2020.

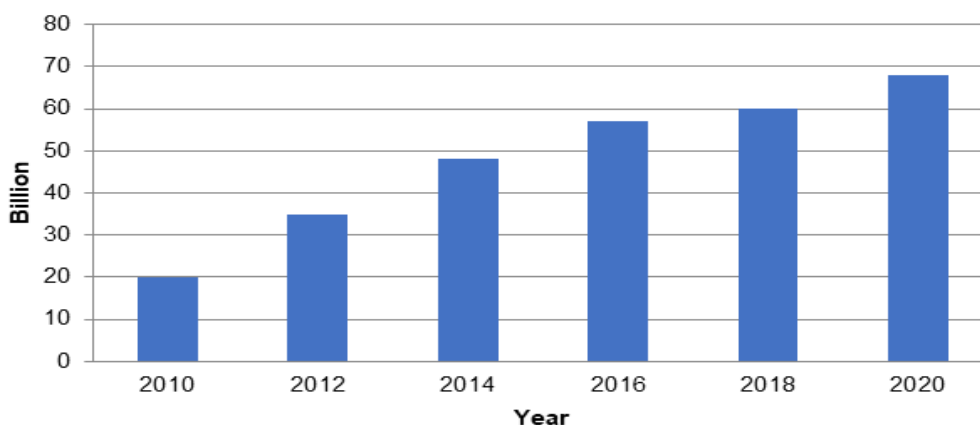


Figure 1: *Pre-owned garment consumption rate during the year 2010 to 2020*

In addition, buying used goods is very common in Sweden, where the standard of living is one of the highest in the world. According to Blocket, Sweden's most popular online shopping market, its total sales spend in 2013 was 414 billion kroner. Despite conventional indicators such as socioeconomic status, barriers can also be considered that prevent certain groups of individuals from participating in the purchase of used goods. Investigators have become interested in pre-owned garments product consumption due to its exponential increase over the past 20 years, which has prompted them to ask why consumers choose to buy used goods. One explanation is that consumers are now more fascinated with used goods than new goods for ecological and economic concerns. In this case, the disadvantaged group stands for individuals who lack the financial means to buy brand-new goods [8]. Financially disadvantaged individuals are the main consumers of pre-owned garments goods, but this doesn't exclude other economically reasonable consumers from participating in the pre-owned garments market. Hence, the term "rational client" refers to those who choose to maximize their utility to reap the most rewards [9].

2. Inspiration of purchasing Pre-owned garments by consumer

According to Edbring[10], the growth of sustainability-related remarks on social media is a blatant indication that customers are becoming more conscious of and concerned about the social and environmental obligations in the fashion business. According to research, innovation, inventiveness, and beauty are the three main aspects that promote customer motivation to impact sustainable business practices and the consumption of fashion. Although they found other requirements for adopting sustainable habits, the three characteristics described above were the most important ones for sustainable fashion purchasing.

3. Measuring Buying Intent of customer

According to Shah [11], one aspect of choosing to buy a specific brand is establishing a purchasing behavior. Describing the purchasing behavior as a circumstance when a buyer is inclined to acquire a particular product in a particular circumstance. Selecting a purchase is a challenging process. The behavior, attitudes, and views of the customer are frequently correlated with the intention to buy. Buying behavior is a crucial factor in how customers obtain and assess a given product. The purchase intention is a useful instrument for forecasting the purchasing process. Purchase intentions may alter as a result of cost or apparent value and quality.

4. Reforming pre-owned garments from a consumer standpoint

According to Cervellon[12], very few investigations have so far focused on consumers' purchasing of vintage clothing, even though the behaviors and reasons for buying pre-owned things have drawn great attention. A notable exception is a study that examine relationship between pre-owned and vintage things and concluded that while vintage is more expensive, buying pre-owned items is driven by the need to show one's personality and be associated with fashion. Consuming and possession, the second stage of the consuming cycle, have traditionally received a lot of attention in the area of consumer research. Additionally, the current assessment of the literature reveals that earlier publications have extensively covered consumers' possession. The exact activities of wearing, showing, sharing, and storing are not always explained when the many components of possession are mentioned. However, collecting behaviors are an exception and have been the subject of multiple previous studies. Previous research on vintage and retro items has looked at topics including vintage consumption patterns and the ownership of vintage clothing from the perspective of consumer identity. Focusing on used luxury, [13] examines the connotations that consumers give to owning used luxury items. Their results demonstrate that buyers' motivations differ between self- and other-related dimensions in the case of used luxury items, which helps understand what makes someone else's garbage another person's treasure.

5. Enhancing pre-owned garments consumption

Table 5 depicts the various existing literature for enhancing pre-owned garments consumption. The pattern shows that pre-owned garment provides somewhat of value to everyone, which has increased the number of pre-owned stores. Researchers in the fashion, as well as marketing fields, have looked at the problems in terms of both external and internal factors in an attempt to completely comprehend the pre-owned garment phenomena [14].

Table 1: *Various existing literature review for enhancing pre-owned garments consumption*

S.No	Reference	Technique	Analyze	Result
1	[15]	131 scholarly publications from various areas were gathered	Textile disposal behavior, Consumption behavior, and pre-owned garments trading issues	The pre-owned clothing results create a clearer view of these phenomena, but more importantly, they outline unique avenues for future research.
2	[16]	An online survey that was semi-structured and included 127 customers from three pre-owned garments retailers in China	Young adults born in the 1990s and 2000 make up the majority (96%) of the consumers under investigation, and neither economic nor environmental concerns greatly influence them.	Retailers and managers of pre-owned garments have important knowledge about creating effective marketing strategies to draw customers and enhance the performance of the used goods business in China
3	[17]	Blockchain-Enabled E-commerce Platform (BEEP)	Indian female customers who use the UTAUT (Unified Theory of Acceptance and Use of Technology) framework and the theoretical constructions of consumer purchasing reasons	The study examines consumers' buying intentions for used apparel online, which encourages the circular economy and decreases waste.
4	[18]	Digital Technologies	More than 1200 consumers participated in a consumer survey, and 10 businesses that sell used fashion models were interviewed in-depth.	The study finds prospects for the advancement of increasingly complex digital technologies to provide more openness and address issues with material source, reliability, and truthfulness.
5	[19]	Structural equation modeling-partial least square (SEM-PLS) technique	A self-reported questionnaire study of Malaysian consumers	The study provides evidence for the direct influence of consumer participation, attitude toward pre-owned garments, and mindful consumption patterns.

6. Global impacts of pre-owned garments

According to Gregson [20], the growth in economic strength and global reach, the pre-owned garments trade more than quadrupled globally between 1991 and 2004. The quick opening of several third-world economies and the unexpected increase in requests from former Eastern Bloc nations in the early 1990s are mostly to blame for this. In most of the West today,

purchasing pre-owned garments is seen as a specialized or niche market, but in emerging economies, pre-owned garment imports from the West are a significant source of apparel. In 2014, China was the leading exporter in terms of both volume and price, followed by the USA, Canada, and Pakistan. Sub-Saharan African nations, which absorbed over 26% of all global exports in 2014, are the leading consumers of used apparel worldwide [21].

6.1. Pre-owned garment market scenario worldwide

As per ThredUp's 2018 Resale Study, the \$20 billion global pre-owned garment retail market is now growing significantly faster than traditional retailing, which is expected to expand by only 2% annually. The possibility is clear since pre-owned apparel sales take place whether or not brands agree. Numerous sales of the same item can generate profit for brands while still upholding their reputation and standards of quality. Therefore, the practice of several internet retailers providing a forum for potential purchasers of pre-owned garments will persist. The global market for pre-owned garments has a 4 billion consumer base, with main players originating from Asia (26%), Africa (35%), and European (27%), with the balance of the world's countries contributing.

6.2. Pre-owned garments trading concept around the World

According to Brooks [22], pre-owned clothing is collected from donors by international business organizations that specialize in classifying them for exporting into several divisions. The initial step in this sorting procedure is to separate the garments into rags, apparel, and fiber. Those are then further categorized based on the kind of product. Figure 2 depicts the pre-owned garment-creating process. One huge organization in the USA, for instance, separates worn clothing into more than 400 different classes before packing similar kinds of clothes into 45-55kg bundles. After that, the bundles are put into containers and transported abroad. The important point to keep in mind is that this apparel was donated in the beginning, was later marketed by certain businesses, and was then legally transferred to its export destination as part of legitimate commerce from one nation to another.

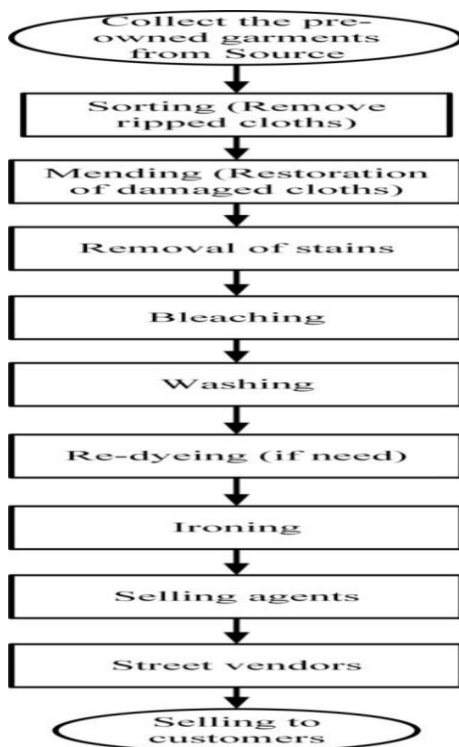


Figure 2: Pre-owned garment creation process

7. Foreign influences on pre-owned garments

According to Areo[23], the desire to modernize with Western education and modernism is the origin of pre-owned western attire in Nigeria, recognized as okrika. The sub-Saharan African nations that include Nigeria, are the biggest markets for the pre-owned garment in the globe, importing about 26% of all global exports in 2004. It's been said that pre-owned garment represents colonists, who served as the prototypes for Eurocentric design. The majority of the pre-owned garment imported into Nigeria comes from the China, United States, United Kingdom, and other European nations that conquered numerous African nations, including Nigeria. Figure 3 depicts the Import and export level of the globe during the years 2010 to 2018. Only a small minority, however, comes from very wealthy Asian nations like Dubai, and South Korea. Nigeria's pre-owned garments industry, which began as a requirement or method of achieving an objective, has now spread around the world after giving in to demands imposed by civilization, modernity, necessity, fashion, and survival instinct. Usage, fashion, and social standing all find common expressions in used apparel.

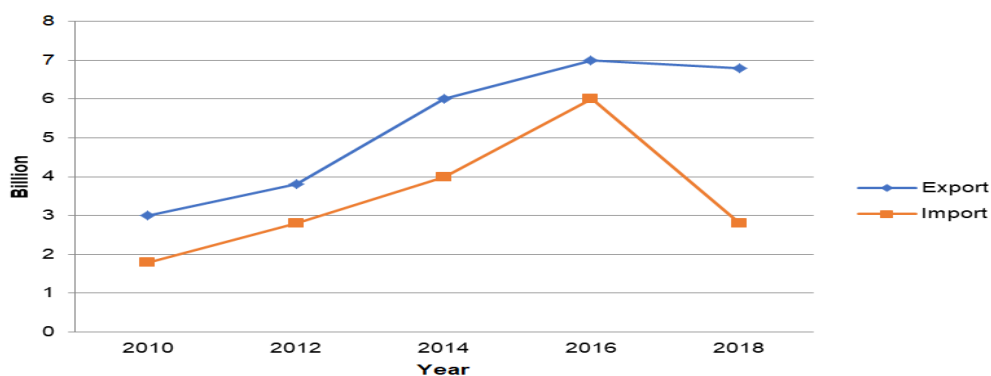


Figure 3: Import and export level during the year 2010 to 2018

7.1. The pre-owned garment in Mumbai

According to Mundkur[24], Mumbai Central is the primary place for trade in importing western and Indian clothing, next to Bhandi Bazaar. Mumbai's well-known "Chor Bazaar" has intriguing purchasing. It's not true that just the impoverished travel to the bazaar; there are also university students, individuals who go to the workplace, visitors, and individuals from all walks of living as well as all different ages who frequent the location. Every day in the early morning hours the seven lanes beginning at the Do Taki intersection will be flooded with vividly colored clothing in all sizes. Usually, business is brisk well before the stores even open. These are being sold in "lots" on pathways, railroad bridges, on the side of the highway, and during weekend bazaars all over the city. It is believed that millions of people rely on the selling of pre-owned garments for their income.

7.2. Pre-owned garments in the East African Region

The East African region of Africa is among the continent's major importers of the pre-owned garment. The entire share of the pre-owned clothing market in the East African region in 2013 was 8%, with Kenya accounting for Tanzania at 1.9%, 3%, Uganda at 1.9%, Burundi at 0.2%, and Rwanda at 0.6%. Kenya was the region's largest importer of pre-owned garments in 2013, but by 2015, Tanzania and Uganda had taken over as the region's top importers of pre-owned garments worldwide. The need for pre-owned garments per individual has grown over time, and by 2015 the east African population alone has been importing \$151 million worth of pre-owned garments.

7.3. Pre-owned garments in Kenya

Since 2001, Kenya has imported an increasing number of pre-owned garment items. The increase is due to the strong market since they are less expensive than new clothing, are seen to be of higher quality, and are easily accessible in both urban and rural regions. The improvement in economic development, which raised household earnings, trade liberalization, which permits the importing of the pre-owned garment, and population expansion are additional variables that are most likely to be responsible for the rise in pre-owned garments imports. Low economic growth, which resulted in a decrease in revenue, is one explanation for the dip in imports of pre-owned garments between 2001 and 2003. From 3.8% in 2001 to 0.5% in 2002, the real domestic product fell, then increased to 2.9% in 2003.

7.3.1 Kenya importation level from 2016 to 2020

The top 7 countries from which used apparel was imported are shown in Figure 4. Only from China were pre-owned garment imports to Kenya totaling 242,650 tonnes. In the whole period of 4 years and 3 months, this amount represented more than one-third of all imports. With 25,550 tones of used garments sent to Kenya, India comes in at number seven on this ranking. Pakistan entered the list of the top 7 suppliers with exports to Kenya totaling 75,648 tonnes which were greater than Canada's supplies, which came in second with 66,910 tonnes of supply. Interestingly, the United States and Germany, in positions 4 and 5, were among the top 7 exporters.

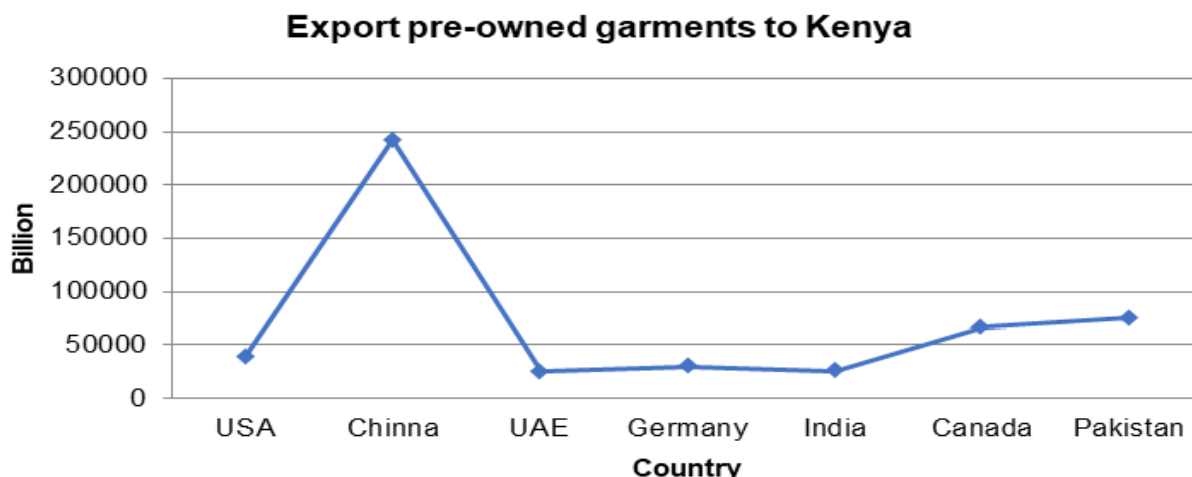


Figure 4: Kenya imports a range of pre-owned garments from seven countries

7.4. Pre-owned garments Clothing in Uganda

In Uganda, pre-owned garment accounts for 81% of all clothing purchases. According to estimates by the Uganda Revenue Authority, from 2000 to 2015, the value of pre-owned garment imports in Uganda shillings increased by an average of 14.81 percent annually.

7.5. Pre-owned Garments Clothing in Tanzania

With about \$63 million in importation in 2015, Tanzanian ranked as the 14th-largest pre-owned garment importer globally. Over the past 20 years, Tanzania's nominal worth of pre-owned garments has climbed from less than \$10 million in 1995 to much more than \$60 million in 2015. But during the past few years, the importing of brand-new apparel has grown and now outpaces that of the pre-owned garment. For instance, Tanzania bought \$62 million worth of pre-owned garments in comparison to \$84 million worth of brand-new apparel, 70% of which came from China.

7.6. *Pre-owned garments in Zambia*

Zambians are considered to have a great fashion sense throughout South Africa. Zambia's elite men are known to favor suits created by tailors on London's Savile Row, and Zambian women are known for dressing more formally than women in the region. Small-scale tailors in the nation's capital, Lusaka, create stylish clothing using chitenge fabric (fabric with a vibrant design) for long-distance dealers to resell under the brand "Zambia" in Southern Africa. Men's suits and women's chitenge ensembles are both a portion of the vastly expanded world of clothing because the market was opened up. In the late 1980s, whenever importing limits were loosened, a pre-owned garment from Europe and the United States swiftly gained popularity as a commerce and consumer item.

7.7. *Chinese Pre-owned Garment Trading Platforms*

China has historically struggled to manage its excess inventory of goods or to manage the residual stock because of employment, relocation, or other circumstances. Because the online pre-owned garments trade portal has been enabled, the recent growth of the pre-owned garment marketplace in China has also attracted attention. China's initial official website for the pre-owned garment trade was introduced in 2011 and has since experienced significant growth. In China, there were 40 million online pre-owned garment buyers and sellers in 2017, generating \$77.3 billion in sales. By 2020, that amount will increase to 80 million, with sales exceeding \$150.7 billion. The "Xianyu," is the biggest online platform for pre-owned garments trade in China. The network's trade volume reportedly reached \$15.4 billion in 2018 with over 1 million customers registered over 2 million products (used products) each day, as per the release. As an outcome, the site has more than 1.4 billion goods. Increasing numbers of young people are utilizing the pre-owned garment trade site; 61% of "Xianyu" customers. The portal swiftly presents trending new items and compiles information on pricey gadgets, designer handbags, designer watches, books, and kid's toys. The robust pre-owned marketplace in China is driven by enormous customer demands, and it will keep growing. In particular, it is anticipated that online pre-owned garment economics, which combines the public sector and e-commerce while also enhancing transactional ease via mobile devices, would continue to expand strongly.

7.8. *Pre-owned garments from the charity organization*

According to Hansen [25], to give an in-depth description of the globally connected approach, it transports pre-owned garment. The multi-billion dollar global pre-owned fashion trade is currently fueled by well-established philanthropic groups. In the West, consumers contribute to charities for clothing they no longer need. While together they send two quadrillion pounds to landfills and millions of dollars to charitable organizations each year, the ordinary American alone discards 68 pounds of worn apparel and textiles every year. Humanitarian groups with headquarters in the US and Europe are unable to sell all the supplied garments in their thrift shops, so they export their vast excess to commercial pre-owned garment dealers at wholesale prices. They started offering shop sales in the late 1950s, and throughout the 1980s, a range of unique for-profit boutiques that sold pre-owned garments joined them. Pre-owned garments are sent to sorting facilities near main port cities by textile recyclers including graders after they buy them in bulk from humanitarian organizations. Since the year 2000, the trade's attention has turned to Toronto, Canada, which is now regarded as the world's most utilized-clothing center. Proficient "pickers" visit sizable textile recycling facilities and choose clothing that is especially appealing to niche sectors like retro and vintage. Certain "diamond" companies, designs, as well as eras of clothes make their way to antique marketplaces.

7.9. Improvement of Pre-owned garments consumption by circular economy

According to Bocken[26], one of the most talked-about strategy is the circular economy (CE), which is developed as a regenerating process of consumption and production. This approach may be used as a substitute since it transforms products immediately after they are consumed to meet the requirements of others, completing the cycles in corporate ecosystems and reducing waste. The CE method's marketing strategy may be divided into two categories in specific: 1. encourage reusing and extending product lifespans via repairing, remanufacturing, upgrades, and retrofits. 2. Recycling used products to create new resources[27]. Creating value out of trash is the ultimate goal of the circular marketing strategy. The garment industry started looking for alternatives to recycling and collecting post-consumer items because of the circular economy's issues. For instance, as a quick fix for worn clothing, individuals began giving them away or selling them to pre-owned stores, selling them via multiple channels like garage sales, flea markets, and online marketplaces, or exchanging them with friends and family [28]. Figure 5 depicts the circular economy for enhancing pre-owned garments consumption.

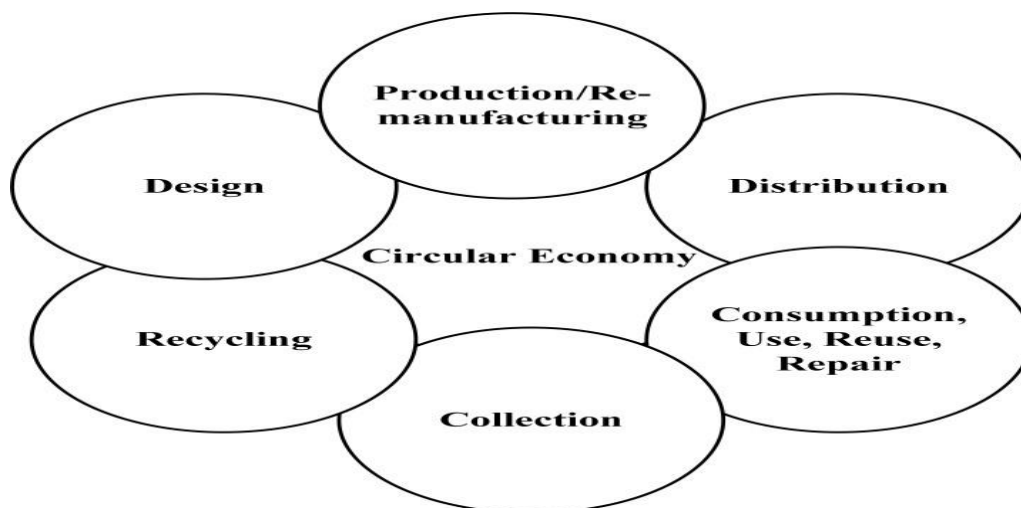


Figure 5: *Circular economy for enhancing pre-owned garments consumption*

7.10. The usage of consuming Pre-owned Garments

According to Haggblade[29], the consumption of pre-owned is unbeatable, and as an outcome of this global trend, the pre-owned garment has fundamentally altered the garments market. Consuming used garments, in the opinion of academics, benefits society. The local employment level increases as a result of the pre-owned garment, which benefits the local economy. The finding was revealed through a comparative evaluation of numerous emerging African nations that pre-owned garments to increase regional income by creating various types of jobs. This includes classifying and rating pre-owned garments, operating a street stall selling the pre-owned garment, or acting as a supplier for pre-owned garments. To assist people in advancing their careers, to provide a second source of revenue and additional training, and to pay taxes so that they may also contribute to the growth of their nation. Also mentions how thrift store shopping inspires creativity.

7.11. Ecological destruction caused by the pre-owned garment industry

According to Allwood [30], the production, use and end of life of clothing all affect the environment and society, making the fashion business a significant player in globalized trade. An approximated 92 million tonnes of post-consumer textile waste are dumped in landfills every year in the largest fashion-consuming nations, such as the USA. These figures will

continue to rise with the world's growing population. Hence, the buildup of post-consumer trash will be the following major issue that results in ecological damage on a bigger scale from landfilling and other factors. Additionally, some manufacturers are resorting to what is known as "eco-fashion" as a partial reaction to the environmental issues that have already been discussed. Utilizing sustainably cultivated cotton, hemp, bamboo, as well as other fiber crops using fewer pesticides, irrigation, as well as other inputs is part of this effort. For instance, sales of organic cotton, which is now grown in at least 12 nations, are increasing yearly. Nevertheless, it presents only accounts for a little portion of the yearly global cotton sales. Encouragement of used product purchases is another trend, driven by businesses like Patagonia Outerwear. National trends are also beginning to emerge, including the French national initiative of Extended Producer Responsibility, that have increased post-consumer textile reuse and disposal by three times since 2006 [31]. Although these tendencies are positive, eventually consumers will have the greatest influence on the sustainability of society. Consumer actions like prolonging the life of clothing, using colder detergents on hotter water, buying less (but potentially greater-quality) clothes, etc would just all help to increase sustainability.

8. Conclusion

The analysis demonstrated the opportunities for enhancing the utilization of pre-owned garments. Relevant literature has been analyzed to develop a conceptual framework and understand the findings of prior investigations, which will help the research accomplish its goal. Overall, the east African nation is a significant importing market for a pre-owned garments from many nations, namely the USA, UK, Canada, and China. Interactions with pre-owned garments inspire people to be creative in many different ways, both locally and abroad. In addition to providing work for market stall owners, street sellers, fashion entrepreneurs, and tailors who make everything from scratch, the pre-owned garment also serves as an inspiration for budding designers. By offering special discounts, free trials, and exchanging alternatives after usage, pre-owned garment sales can also be promoted. Refreshing the product's design will also aid in luring customers to purchase it.

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