



Jeans in France

February 2026

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Polarisation and sustainability shape jean sales in France

Chart 1 - Key Trends 2025

Chart 2 - Analyst Insight

INDUSTRY PERFORMANCE

Volume declines during budget pressures, yet affordable options show resilience

Market polarisation drives success at both ends of the scale

Premium and sustainable options gain traction in jeans

Chart 3 - Kiabi Lauches a Made in France Jean Priced at EUR35 in 2025

WHAT'S NEXT?

Sustainable and comfort-focused strategies are expected to drive growth

Economy jeans will remain the largest subcategory, while premium jeans drive growth

COMPETITIVE LANDSCAPE

Fragmentation persists in jeans despite strong brand leaders

Chart4 X - Zorzetto 161N - Locally Made "Suit Jeans" that Breaks the Codes In 2025

Opportunities for brands to focus on sustainability and local production

CHANNELS

Apparel and footwear specialists lead jeans distribution despite a fall in share

Convenience and affordability support jean sales through retail e-commerce

PRODUCTS

Sustainable materials and local production drive innovation

Chart 4 - Atelier Tuffery – New Spring 2025 Collection Made from Organic Cotton and Hemp

COUNTRY REPORTS DISCLAIMER

[Apparel and Footwear in France - Industry Overview](#)

EXECUTIVE SUMMARY

Sustainability and technology are key drivers in apparel and footwear in France

KEY DATA FINDINGS

Chart 5 - Key Trends 2025

Chart 6 - Analyst Insight

INDUSTRY PERFORMANCE

Fast fashion drives market polarisation and value sales

Apparel remains the largest subcategory despite a slowdown in growth

Sportswear drives growth with sustainability and technology

Chart 7 - Naumy Flash - the New Local Store-Based Retailer vs Pure Players in Fast Fashion

WHAT'S NEXT?

Ongoing market polarisation and a demand for affordability will shape apparel and footwear

Sustainability and technology are expected to influence product innovation

Omnichannel strategies will remain key to players success

COMPETITIVE LANDSCAPE

Omnichannel strategies support the position of leading brands in apparel and footwear

Groupe Beaumanoir SA's acquisition boosts its presence in sportswear

CHANNELS

Specialist retailers and retail e-commerce offer strong product selections and competitive prices

Omnichannel strategies and affordability are key drivers of sales

PRODUCTS

AI and tech innovation drives product customisation

Chart 8 - The Gen AI from Imki Helps To Create the Jonak's Laces More Capsule Collection

Sustainability and inclusivity influence product design

Chart 9 - Marine Serre – a Sustainable Luxury Local Brand that Creates with Durable Linen

ECONOMIC CONTEXT

Chart 10 - Real GDP Growth and Inflation 2020-2030

Chart 11 - PEST Analysis in France 2025

CONSUMER CONTEXT

Chart 12 - Key Insights on Consumers in France 2025

Chart 13 - Consumer Landscape in France 2025

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/jeans-in-france/report.