

Circular Fashion Rental and Resale Platforms Market Forecasts to 2034 – Global Analysis By Platform Type (Peer-to-Peer Resale Platforms, Brand-Owned Resale Platforms, Rental Subscription Platforms and One-Time Rental Platforms), Product Category, Business Model, Consumer Demographics, Technology Integration, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Circular Fashion Rental and Resale Platforms Market is accounted for \$2.8 billion in 2026 and is expected to reach \$5.8 billion by 2034 growing at a CAGR of 9.6% during the forecast period. Circular fashion rental and resale platforms are reshaping the clothing sector by prolonging the use of garments and decreasing textile waste. These services allow individuals to rent, buy, or sell second-hand apparel, supporting both cost savings and environmental responsibility. By fostering repeated use and limiting excessive production, they contribute to reduced emissions and lower resource usage linked to fast fashion practices. Technologies like AI-based suggestions and smart inventory management improve efficiency and customer satisfaction. Increasing awareness about sustainability and evolving consumer behavior toward greener options are driving their growth. Consequently, these platforms play a crucial role in advancing a circular and sustainable fashion industry.

According to the Ellen MacArthur Foundation, data shows that extending the average life of clothing by just nine months reduces carbon, water, and waste footprints by around 20–30%. This directly supports the growth of circular fashion rental and resale platforms, which are designed to maximize garment lifecycles.

Market Dynamics:

Driver:

Growing consumer demand for sustainable fashion

Increasing awareness of environmental challenges is strongly boosting the circular fashion rental and resale market. Consumers are becoming more conscious of issues such as clothing waste, excessive water use, and emissions caused by fast fashion production. This awareness is pushing them toward sustainable habits like renting outfits and purchasing second-hand clothing. Younger generations, especially Gen Z and millennials, are at the forefront, favoring brands that align with eco-friendly values. Social media platforms and environmental campaigns are also shaping consumer attitudes. As demand for responsible fashion choices rises, circular platforms are expanding steadily, supporting the broader shift toward sustainable and reuse-focused apparel consumption practices.

Restraint:

Quality concerns and hygiene issues

Hygiene worries and doubts about product quality act as major obstacles for circular fashion rental and resale platforms. Consumers often feel uncertain about wearing previously used garments due to concerns about cleanliness, durability, and overall condition. Even with proper sanitization measures, negative perceptions can limit adoption, especially among new users. Variations in product quality across resale listings can also reduce trust and satisfaction. Issues such as damaged fabrics, poor upkeep, or counterfeit goods influence buying decisions. These factors discourage broader acceptance, particularly in markets where new clothing is preferred, thereby restricting the expansion of circular fashion platforms and slowing their overall market growth.

Opportunity:

Collaboration with fashion brands and designers

Partnering with fashion brands and designers offers valuable growth opportunities for circular fashion rental and resale platforms. These collaborations enable brands to prolong the usage of their products while accessing new customer groups through

resale and rental services. Designers can also develop clothing lines suited for repeated use, increasing durability and attractiveness. Such alliances boost platform credibility and draw a larger audience. Combined promotional efforts further increase awareness of sustainable fashion. By working with recognized brands, platforms can enhance trust, expand their customer base, and encourage wider adoption across both high-end and everyday fashion markets.

Threat:

Intense market competition

High levels of competition represent a major challenge for circular fashion rental and resale platforms. The market is becoming crowded with new entrants, established brands, and large online retailers offering similar services. This leads to price competition and limited differentiation among platforms. Smaller companies may struggle to gain customer attention and build loyalty in such an environment. Significant spending on marketing and branding is often necessary to stay competitive. As rivalry increases, profitability can decrease, and retaining users becomes more difficult, making it harder for businesses to achieve sustainable growth and secure a strong foothold in the evolving market.

Covid-19 Impact:

The pandemic created both challenges and opportunities for circular fashion rental and resale platforms. Rental services saw a decline in demand as events, travel, and office activities were limited, reducing the need for occasion-based clothing. In contrast, resale platforms gained popularity as consumers looked for cost-effective shopping options during economic uncertainty. Early disruptions in logistics and concerns about garment hygiene impacted operations, but the rise of online shopping helped platforms adapt. Increased focus on sustainability further supported interest in circular fashion. With the gradual return of normal activities, rental demand improved, while resale continued to grow, strengthening the overall market outlook.

The peer-to-peer resale platforms segment is expected to be the largest during the forecast period

The peer-to-peer resale platforms segment is expected to account for the largest market share during the forecast period as they offer high accessibility and encourage active user involvement. These platforms allow consumers to directly trade second-hand

clothing, forming a flexible marketplace that does not rely heavily on owned inventory. A constant flow of user-listed items ensures a wide variety of products. Affordable pricing and easy platform navigation appeal to a diverse audience. Increasing acceptance of pre-owned fashion and the expansion of online marketplaces further support their leadership position. This model's scalability and strong engagement make peer-to-peer resale platforms the leading segment in the circular fashion ecosystem.

The designers & brands segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the designers & brands segment is predicted to witness the highest growth rate as they increasingly adopt sustainable and circular strategies. Many companies are introducing their own resale and rental initiatives to prolong product usage and engage customers more effectively. Their established reputation and quality control help build consumer confidence, encouraging higher participation. Designers are also focusing on producing long-lasting garments suitable for repeated use. Collaborations with circular platforms and rising regulatory expectations for sustainability are driving this rapid expansion, making designers and brands the segment with the highest growth potential in the market.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by strong awareness of sustainability and advanced digital capabilities. The region's mature e-commerce landscape makes it easy for consumers to access rental and resale services. Growing interest in second-hand clothing, influenced by environmental concerns and cost benefits, drives adoption. The presence of leading companies and emerging startups enhances market development. Furthermore, increasing corporate focus on sustainability and rising investments in circular strategies strengthen growth. These factors collectively position North America as the leading region, maintaining the highest market share in the global circular fashion ecosystem.

Region with highest CAGR:

Over the forecast period, the Asia-Pacific region is anticipated to exhibit the highest CAGR, driven by urban expansion, higher income levels, and strong digital connectivity. A young and style-oriented population is increasingly exploring cost-effective and eco-friendly fashion options. Improved online retail networks and widespread smart phone

usage enhance platform accessibility across the region. Growing environmental awareness and supportive policies for sustainability are also boosting adoption. Both regional start-ups and global companies are increasing investments, contributing to rapid market expansion. These combined factors establish Asia-Pacific as the region with the highest growth rate in the circular fashion industry.

Key players in the market

Some of the key players in Circular Fashion Rental and Resale Platforms Market include Rent the Runway, Vestiaire Collective, Vinted, Depop, HURR, The Volte, Vivrelle, Nuuly, Le Tote, GlamCorner, Style Theory, FashionPass, MyWardrobeHQ, Swap.com, Rebag, ThredUp, The RealReal and Poshmark.

Key Developments:

In December 2025, HURR and Deliveroo have announced the expansion of their “Dress to Door” partnership – now available in more UK cities, towns and counties including Manchester, Birmingham, Greater London, Kent, Northampton, Staffordshire, as well as further locations in Central London. The announcement, just in time for the Christmas party season, follows the success of last year’s London-focused trial, and also spotlights the women behind HURR’s thriving Lender community.

In June 2025, Rebag has partnered with Luxury Stores at Amazon. Through the partnership, customers will have access to a curated collection of more than 30,000 pre-owned luxury pieces from Rebag, including handbags, jewelry and watches, per the release. Rebag items purchased through Luxury Stores at Amazon will be shipped by Rebag, with Amazon offering free delivery and returns.

In January 2023, Rent the Runway is expanding its customer base through a new partnership with Amazon Fashion, where it has launched an online storefront. Amazon customers can purchase items from Rent the Runway’s designer exclusives as well as secondhand garments retired from its rental service. The company has forged a number of partnerships with retailers and even a hotel chain to ease pick up and drop off of rented items and to fuel sales.

Platform Types Covered:

Peer-to-Peer Resale Platforms

Brand-Owned Resale Platforms

Rental Subscription Platforms

One-Time Rental Platforms

Product Categories Covered:

Apparel

Footwear

Accessories

Business Models Covered:

Commission-Based

Subscription-Based

Pay-Per-Use

Hybrid Models

Consumer Demographics Covered:

Millennials

Gen Z

Professionals

High-Income Consumers

Technology Integrations Covered:

Mobile Applications

AI-Powered Personalization

Blockchain for Authentication

AR/VR Try-On Solutions

End Users Covered:

Individual Consumers

Fashion Retailers

Designers & Brands

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

- Market share assessments for the regional and country-level segments

- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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