



DENIM



Première Vision x Institut Français de la Mode (IFM) study
November 2022

JEANS: THE MANUFACTURING CRITERIA OF A FASHION PRODUCT SPOTLIGHTING SUSTAINABILITY CHALLENGES IN THE TEXTILE INDUSTRY.

An iconic fashion item for consumers, **jeans continue to play a fundamental role in our wardrobes**. Comfortable, accessibly priced, **they're sold around the world, in all major countries**.

But given the **growing ecological awakening**, and the voices being raised around the world to find sustainable development solutions that consider all the global challenges facing people and the planet, **the fashion industry must find a way to reinvent itself through more virtuous production methods**.

So, were this widely bought product to seek to address the industry's sustainable challenges, which criteria should factor in its manufacturing?

Première Vision took a close look at this iconic product in a study conducted last April, to coincide with the **15th anniversary of Denim Première Vision**, the next edition of which will take place **this November 23 & 24** in Milan.

This study was conducted as part of the Chair launched by **Première Vision in partnership with the French Fashion Institute (IFM)**, and examined European & American consumers' buying behaviors and sustainable criteria regarding fashion products. The study was carried out in April 2022 in France, Italy, Germany, the UK and US, of 6,000 people (1,200 respondents per country), a sample representative of the population aged 18 and over of each country.

JEANS, A BUY THAT HAS RESONATED WITH CONSUMERS FOR DECADES

An iconic product in the forefront of the entire fashion scene, especially in the US, Great Britain and Germany



Changes in consumption (in dollars) of jeans internationally*.

Prior to the crisis (from 2016 to 2019)

UNITED STATES: **+0.7%**

GREAT BRITAIN: **+4.8%**

GERMANY: **+3%**

FRANCE: **-4%**

ITALY: **-4.8%**

After the health crisis (from 2020 to 2021)

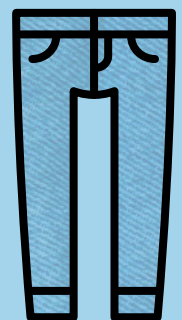
UNITED STATES: **+27%**

GREAT BRITAIN: **+22%**

GERMANY: **+17%**

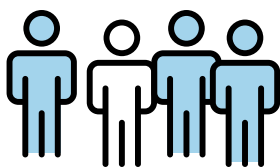
FRANCE: **+14.6%**

ITALY: **+10%**



*Data derived from the «Euromonitor» database

A product purchased/repeated several times a year



3/4

of respondents buy or buy this product again

1 to 3 times

in a year.

Italians, Americans and Germans are the Top 3 of jeans consumers



Italians



Americans



Germans

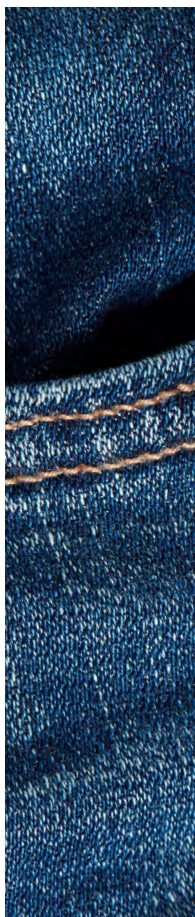
Followed by French and British consumers, in 4th and 5th position,



French

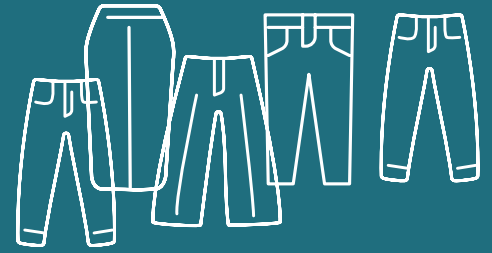


British



Consumers have over 6 pairs of jeans in their wardrobes

French consumers own **4 to 6** pairs of jeans and 1/3 of them own over 6 pairs.



Why are jeans so appealing?

A comfortable product at an affordable price in France as in all other countries

68.2%

Americans

67.6%

English

63.5%

Italians

62.5%

Germans

62.4%

French

A PRODUCT THAT SPEAKS TO SUSTAINABLE FASHION

Even though price and comfort remain the top two priorities, the **sustainability** factor turns out to be **third** purchasing criteria for a denim product



For **1/4** of French consumers (**22.9%**)
UK (**22.9%**)
Americans (**24%**)

A factor that takes more precedence in Germany (**33.1%**)
and in Italy (**37%**)



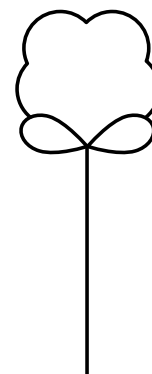
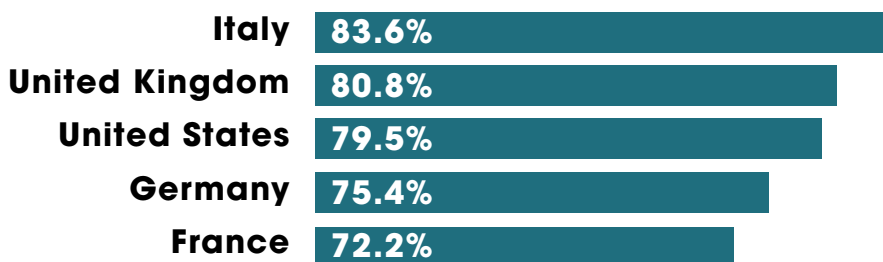
France is in **4th place** among countries giving particular importance to sustainability and transparency in the jeans purchased



WHAT ARE THE CRITERIA FOR SUSTAINABLE JEANS ACCORDING TO CONSUMERS?

A design based on materials that respect the environment:

Recycled fibers, organic cotton or organically-certified fabrics for the majority of consumers,



Taking into account current economic issues in the textile industry

Favor relocation of production in their home country

For **44.9%** of Americans and **41.7%** of the French. Two countries that have been actively promoting and highlighting the importance of «Made in» in the manufacturing process for several years

Promote production respecting social and ethical conditions



Germany	Italy	France
34.1%	39.8%	35.5%

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