

# Beauty and Personal Care in France

May 2024

Table of Contents

## Beauty and Personal Care in France

### EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for beauty and personal care?

### MARKET DATA

Table 1 - Sales of Beauty and Personal Care by Category: Value 2018-2023

Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2018-2023

Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2018-2023

Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2023

Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Baby and Child-Specific Products in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Declining birth rate and inflation pose challenges for baby and child-specific products

Innovation drives growth in baby and child-specific sun care

Recyclable and eco-friendly packaging increasingly prevalent

#### PROSPECTS AND OPPORTUNITIES

Declining number of newborns an ongoing threat to growth

Price sensitivity and economic uncertainty will favour mass brands

Clean formulae, ingredient transparency, and all things natural

### CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2018-2023

Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2018-2023

Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2018-2023

Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2019-2023

Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2020-2023

Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2020-2023

Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023

Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023

Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028

Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028

Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

## Bath and Shower in France

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Bath and shower products leverage the health trend even after COVID-19

Price-friendly innovations: Packaging convenience and refillables

Embracing the natural trend and cleaner formulae

### PROSPECTS AND OPPORTUNITIES

Limit on promotions set to present challenges

Beauty standards will continue to evolve

Focus on sustainable packaging

### CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2018-2023

Table 23 - Sales of Bath and Shower by Category: % Value Growth 2018-2023

Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023

Table 25 - NBO Company Shares of Bath and Shower: % Value 2019-2023

Table 26 - LBN Brand Shares of Bath and Shower: % Value 2020-2023

Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023

Table 28 - Forecast Sales of Bath and Shower by Category: Value 2023-2028

Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028

Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

## Colour Cosmetics in France

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Colour cosmetics faces challenges amidst the natural beauty trend and inflationary pressures

Capturing Gen Z: Evolution of beauty retail through e-commerce and social media

Growing price sensitivity drives sales in discounters

### PROSPECTS AND OPPORTUNITIES

Progress expected in colour cosmetics for men

Embracing corporate responsibility, sustainability, and transparency

A new dimension to the shopping experience with the help of AR

### CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2018-2023

Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2018-2023

Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2019-2023

Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2020-2023

Table 35 - LBN Brand Shares of Eye Make-up: % Value 2020-2023

Table 36 - LBN Brand Shares of Facial Make-up: % Value 2020-2023

Table 37 - LBN Brand Shares of Lip Products: % Value 2020-2023

Table 38 - LBN Brand Shares of Nail Products: % Value 2020-2023

Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2020-2023

Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2023-2028

Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028

## Deodorants in France

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Deodorants recovers to the pre-COVID-19 level of value sales  
Survival of deodorant sprays: Betting on efficacy and convenience  
Premiumisation, and the rise of body sprays

## PROSPECTS AND OPPORTUNITIES

Solid deodorants set to be the rising star of deodorants  
Growing demand for natural ingredients and vegan formulae  
Sustainable packaging will be a key area of focus

## CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2018-2023  
Table 43 - Sales of Deodorants by Category: % Value Growth 2018-2023  
Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2018-2023  
Table 45 - NBO Company Shares of Deodorants: % Value 2019-2023  
Table 46 - LBN Brand Shares of Deodorants: % Value 2020-2023  
Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2020-2023  
Table 48 - Forecast Sales of Deodorants by Category: Value 2023-2028  
Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2023-2028  
Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

## Depilatories in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Rise of beauty salons, anti-hair removal trend, and inflationary pressures pose challenges for depilatories  
Promotions are gaining increasing importance  
Refillable razor systems on the rise

## PROSPECTS AND OPPORTUNITIES

At-home hair removal solutions will continue to threaten the growth of depilatories  
Focus on innovation to attract consumers  
Eco-friendly solutions expected to become more readily available and popular

## CATEGORY DATA

Table 51 - Sales of Depilatories by Category: Value 2018-2023  
Table 52 - Sales of Depilatories by Category: % Value Growth 2018-2023  
Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2019-2023  
Table 54 - NBO Company Shares of Depilatories: % Value 2019-2023  
Table 55 - LBN Brand Shares of Depilatories: % Value 2020-2023  
Table 56 - Forecast Sales of Depilatories by Category: Value 2023-2028  
Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

## Fragrances in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Premium fragrances remain an important element of the beauty routine in France  
Niche and extra-luxurious fragrances on the rise  
Retail e-commerce suffers from the return to stores

## PROSPECTS AND OPPORTUNITIES

Refillable fragrances set to gain popularity  
Promotions expected to gain importance

Adopt Parfums is revitalising mass fragrances

## CATEGORY DATA

Table 58 - Sales of Fragrances by Category: Value 2018-2023

Table 59 - Sales of Fragrances by Category: % Value Growth 2018-2023

Table 60 - NBO Company Shares of Fragrances: % Value 2019-2023

Table 61 - LBN Brand Shares of Fragrances: % Value 2020-2023

Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023

Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023

Table 64 - Forecast Sales of Fragrances by Category: Value 2023-2028

Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

## Hair Care in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Salon professional hair care leads growth in 2023

"Skinification" has an impact on hair care

Natural beauty trend – embracing different hairstyles

### PROSPECTS AND OPPORTUNITIES

Ingredient transparency likely to become more important

The evolution of natural and sustainable hair care

Growth of e-commerce set to continue

## CATEGORY DATA

Table 66 - Sales of Hair Care by Category: Value 2018-2023

Table 67 - Sales of Hair Care by Category: % Value Growth 2018-2023

Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2018-2023

Table 69 - NBO Company Shares of Hair Care: % Value 2019-2023

Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023

Table 71 - LBN Brand Shares of Hair Care: % Value 2020-2023

Table 72 - LBN Brand Shares of Colourants: % Value 2020-2023

Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023

Table 74 - LBN Brand Shares of Styling Agents: % Value 2020-2023

Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2020-2023

Table 76 - Forecast Sales of Hair Care by Category: Value 2023-2028

Table 77 - Forecast Sales of Hair Care by Category: % Value Growth 2023-2028

Table 78 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

## Men's Grooming in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Men's shaving continues to struggle, but men's toiletries and fragrances perform well

Premium fragrances is the main growth driver in men's grooming

Natural features, transparency, and technical ingredients

### PROSPECTS AND OPPORTUNITIES

Men's skin care poised for growth

Refillable choices expected to be on the rise

Efforts to revitalise men's shaving

## CATEGORY DATA

Table 79 - Sales of Men's Grooming by Category: Value 2018-2023

Table 80 - Sales of Men's Grooming by Category: % Value Growth 2018-2023

Table 81 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2020-2023

Table 82 - Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023

Table 83 - NBO Company Shares of Men's Grooming: % Value 2019-2023

Table 84 - LBN Brand Shares of Men's Grooming: % Value 2020-2023

Table 85 - LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023

Table 86 - Forecast Sales of Men's Grooming by Category: Value 2023-2028

Table 87 - Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

## Oral Care in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Volume sales are challenged by inflationary pressures

Focus on tooth sensitivity and gum protection

Electric toothbrushes is the strongest growth driver

### PROSPECTS AND OPPORTUNITIES

Price sensitivity is expected to be the main concern in the early forecast period

Organic and natural products, and eco-friendly packaging

Toothpastes with therapeutic and whitening functions set to continue to rise

## CATEGORY DATA

Table 88 - Sales of Oral Care by Category: Value 2018-2023

Table 89 - Sales of Oral Care by Category: % Value Growth 2018-2023

Table 90 - Sales of Toothbrushes by Category: Value 2018-2023

Table 91 - Sales of Toothbrushes by Category: % Value Growth 2018-2023

Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2019-2023

Table 93 - NBO Company Shares of Oral Care: % Value 2019-2023

Table 94 - LBN Brand Shares of Oral Care: % Value 2020-2023

Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2020-2023

Table 96 - LBN Brand Shares of Toothpaste: % Value 2020-2023

Table 97 - Forecast Sales of Oral Care by Category: Value 2023-2028

Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2023-2028

Table 99 - Forecast Sales of Toothbrushes by Category: Value 2023-2028

Table 100 - Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

## Skin Care in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Skin care a focus of French consumers

Digitalisation and personalisation are shaping skin care

Natural origin, digital passports, and ingredient transparency

Packaging enhancements and the rise of refillables

### PROSPECTS AND OPPORTUNITIES

Dermocosmetics boom set to continue

Focus on inclusivity expected

Waterless skin care products likely to see growth

## CATEGORY DATA

Table 101 - Sales of Skin Care by Category: Value 2018-2023

Table 102 - Sales of Skin Care by Category: % Value Growth 2018-2023

Table 103 - NBO Company Shares of Skin Care: % Value 2019-2023

Table 104 - LBN Brand Shares of Skin Care: % Value 2020-2023

Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2020-2023

Table 106 - LBN Brand Shares of Anti-agers: % Value 2020-2023

Table 107 - LBN Brand Shares of Firming Body Care: % Value 2020-2023

Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2020-2023

Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2020-2023

Table 110 - Forecast Sales of Skin Care by Category: Value 2023-2028

Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

## Sun Care in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sun care products are becoming part of more consumers' daily care routine

Rising concerns about octocrylene and other ingredients

Eco packaging designs are becoming more prevalent

### PROSPECTS AND OPPORTUNITIES

A rise expected for dermocosmetics brands

Tinted sun protection products likely to gain popularity

Initiatives to protect marine ecosystems

## CATEGORY DATA

Table 112 - Sales of Sun Care by Category: Value 2018-2023

Table 113 - Sales of Sun Care by Category: % Value Growth 2018-2023

Table 114 - NBO Company Shares of Sun Care: % Value 2019-2023

Table 115 - LBN Brand Shares of Sun Care: % Value 2020-2023

Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023

Table 117 - Forecast Sales of Sun Care by Category: Value 2023-2028

Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

## Premium Beauty and Personal Care in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

"Less is more" trend benefits the growth of premium beauty and personal care

Consumers expect premium brands to be eco-responsible

Fragrances leads the growth of premium beauty and personal care

### PROSPECTS AND OPPORTUNITIES

A continued focus on dermatologicals expected

"Skinification" trend set to fuel the growth of premium hair care products

Advances in technology will pave the way for more personalised experiences

## CATEGORY DATA

Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2018-2023

Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2019-2023

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2020-2023

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

## Mass Beauty and Personal Care in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Mass adult sun care, deodorants, and skin care see the strongest growth

Flexibility in format offerings

Promotions and price offers are sought-after

#### PROSPECTS AND OPPORTUNITIES

The upcoming Descrozaile law is likely to present challenges

Growing price sensitivity will continue to benefit discounters

Natural and organic products set to continue to see rising interest

#### CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2018-2023

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028

Table 130 - Forecast Sales of Mass Beauty and Personal Care by Category: % Value Growth 2023-2028

## 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/beauty-and-personal-care-in-france/report](https://www.euromonitor.com/beauty-and-personal-care-in-france/report).