

# Consumer Health in France

September 2023

**Table of Contents** 

#### Consumer Health in France

#### **EXECUTIVE SUMMARY**

Consumer health in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for consumer health?

#### MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2018-2023

Table 2 - Life Expectancy at Birth 2018-2023

#### MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2018-2023

Table 4 - Sales of Consumer Health by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Consumer Health: % Value 2019-2023

Table 6 - LBN Brand Shares of Consumer Health: % Value 2020-2023

Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2018-2023

Table 8 - Distribution of Consumer Health by Format: % Value 2018-2023

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2023

Table 10 - Forecast Sales of Consumer Health by Category: Value 2023-2028

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2023-2028

#### **APPENDIX**

OTC registration and classification

Vitamins and dietary supplements registration and classification

Self-medication/self-care and preventive medicine

Switches

## DISCLAIMER

## **DEFINITIONS**

#### **SOURCES**

Summary 1 - Research Sources

# Analgesics in France

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Acetaminophen remains popular form of analgesics in France

Acetaminophen shortage in France: Cold season demand surpasses supply

"Medical deserts" push French consumers to seek advice from pharmacists, benefiting the OTC market

#### PROSPECTS AND OPPORTUNITIES

NSAIDs expected to further decline over the forecast period

In the face of prolonged periods of flu, COVID-19 and bronchitis, consumers look for natural alternatives France aims to regain medical sovereignty to guarantee supply to its population

#### **CATEGORY DATA**

Table 12 - Sales of Analgesics by Category: Value 2018-2023

Table 13 - Sales of Analgesics by Category: % Value Growth 2018-2023

Table 14 - NBO Company Shares of Analgesics: % Value 2019-2023

Table 15 - LBN Brand Shares of Analgesics: % Value 2020-2023

Table 16 - Forecast Sales of Analgesics by Category: Value 2023-2028

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2023-2028

## Sleep Aids in France

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Demand for sleep aids remains high, driven by rising stress levels during cost-of-living crisis

Format becomes key factor in the success of sleep aids

Natural products becoming increasingly popular among local consumers

## PROSPECTS AND OPPORTUNITIES

Sustained growth for sleep aids amid economic uncertainty

OTC players to experience greater competition from herbal/traditional options, including CBD products

Growth of dietary supplements could potentially disrupt standard sleep aids

#### CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2018-2023

Table 19 - Sales of Sleep Aids: % Value Growth 2018-2023

Table 20 - NBO Company Shares of Sleep Aids: % Value 2019-2023

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2020-2023

Table 22 - Forecast Sales of Sleep Aids: Value 2023-2028

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2023-2028

## Cough, Cold and Allergy (Hay Fever) Remedies in France

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Cough, cold and allergy (hay fever) remedies enjoys positive performance in 2023

"Triple epidemic" and exceptionally long outbreak of flu boost demand

Shortages in analgesics benefit sales of cough, cold and allergy (hay fever) remedies

## PROSPECTS AND OPPORTUNITIES

Longer allergy seasons expected to drive growth of antihistamines/allergy remedies (systemic)

Competition from holistic health and natural alternatives

OTC products will continue to benefit from increasing trend of self-medication

## **CATEGORY DATA**

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2018-2023

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2018-2023

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2019-2023

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2023

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2023-2028

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2023-2028

## Dermatologicals in France

# KEY DATA FINDINGS

# 2023 DEVELOPMENTS

Dermatologicals experiences slowing growth in 2023

Stress and anxiety remain strong growth drivers in 2023

Women's health awareness supports value sales of vaginal antifungals

#### PROSPECTS AND OPPORTUNITIES

Warmer and longer summers will benefit dermatologicals, especially antifungals and antiparasitics

Varying impact on dermatologicals can emerge from changing demographics

Competition from natural remedies grows as dermatological solutions

#### **CATEGORY DATA**

Table 30 - Sales of Dermatologicals by Category: Value 2018-2023

Table 31 - Sales of Dermatologicals by Category: % Value Growth 2018-2023

Table 32 - NBO Company Shares of Dermatologicals: % Value 2019-2023

Table 33 - LBN Brand Shares of Dermatologicals: % Value 2020-2023

Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2020-2023

Table 35 - Forecast Sales of Dermatologicals by Category: Value 2023-2028

Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2023-2028

# Digestive Remedies in France

## KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Subdued growth for digestive remedies in 2023 as consumers look to preventive health measures

Rising awareness of irritable bowel syndrome in France

Competition from focus on gut health and increasing demand for probiotics

## PROSPECTS AND OPPORTUNITIES

Greater focus on gut-brain axis could benefit digestive remedies as consumers focus shift to preventive health through improved digestion France's ageing population set to benefit certain digestive remedies

Decline for laxatives due to concerns over misuse and increasing interest in more natural solutions

## **CATEGORY DATA**

Table 37 - Sales of Digestive Remedies by Category: Value 2018-2023

Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2018-2023

Table 39 - NBO Company Shares of Digestive Remedies: % Value 2019-2023

Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2020-2023

Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2023-2028

Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2023-2028

## Eye Care in France

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Positive performance by eye care influenced by growing concerns over prolonged exposure to digital screens

Growing demand for allergy eye care in 2023 due to pollution and prolonged pollen season

Eye care remains consolidated and stable competitive landscape in 2023

#### PROSPECTS AND OPPORTUNITIES

Potential for preventive health trend to gain further momentum in France

An "epidemic of myopia" will promote sales of eye care

OTC eye care is evolving amid ophthalmologist shortages

#### **CATEGORY DATA**

Table 43 - Sales of Eye Care by Category: Value 2018-2023

Table 44 - Sales of Eye Care by Category: % Value Growth 2018-2023

Table 45 - NBO Company Shares of Eye Care: % Value 2019-2023

Table 46 - LBN Brand Shares of Eye Care: % Value 2020-2023

Table 47 - Forecast Sales of Eye Care by Category: Value 2023-2028

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2023-2028

## NRT Smoking Cessation Aids in France

#### **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Demand for NRT smoking cessation aids marginally improves

Tech-driven innovation boosts category growth in 2023

Marketing strategies remain essential to promote stronger growth

## PROSPECTS AND OPPORTUNITIES

Declining demand for NRT smoking cessation aids due to lack of trust in their efficacy

Rising concerns over vaping among younger adults encourages government prevention strategies to reduce smoking in France Pharmacists will be able to prescribe nicotine substitutes, including e-cigarettes, thereby offering greater competition

#### CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2018-2023

## **CATEGORY DATA**

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2018-2023

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2018-2023

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2019-2023

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2020-2023

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2023-2028

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2023-2028

# Wound Care in France

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Positive demand for wound care in 2023 in line with greater mobility of population

First aid kits leads growth within French wound care

Laboratoires URGO retains leadership of consolidated competitive landscape

## PROSPECTS AND OPPORTUNITIES

Warmer temperatures and ageing population likely to benefit wound care

Lack of doctors encourages consumers to seek advice from pharmacists

The 2024 Summer Olympics has potential to boost wound care sales

#### **CATEGORY DATA**

Table 56 - Sales of Wound Care by Category: Value 2018-2023

Table 57 - Sales of Wound Care by Category: % Value Growth 2018-2023

Table 58 - NBO Company Shares of Wound Care: % Value 2019-2023

Table 59 - LBN Brand Shares of Wound Care: % Value 2020-2023

Table 60 - Forecast Sales of Wound Care by Category: Value 2023-2028

Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2023-2028

## Sports Nutrition in France

## KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Increase in activity post-pandemic continues to promote sports nutrition Surge in sports nutrition for enhanced performance and recovery

Vegan sports nutrition experiences increasing demand in 2023

#### PROSPECTS AND OPPORTUNITIES

2024 Summer Olympics in Paris could boost sports nutrition sales

Social media benefits sports nutrition through influencers and sports coaches

Innovation and wide range of choices will boost sports nutrition over forecast period

## CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2018-2023

Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2018-2023

Table 64 - NBO Company Shares of Sports Nutrition: % Value 2019-2023

Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2020-2023

Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2023-2028

Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2023-2028

## Dietary Supplements in France

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Dietary supplements experiences dynamic growth as French consumers strive to achieve longer-term health benefits Dietary supplements benefits from social media advertising

Probiotic boom: France embraces gut-health revolution and digestive health, leading to upturn in dietary supplement sales

## PROSPECTS AND OPPORTUNITIES

Increasing awareness of women's health issues will benefit sales of dietary supplements

Further marketing needed for eye health supplements to improve sales

High stress levels will benefit magnesium and other minerals

#### CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2018-2023

Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2018-2023

Table 70 - Sales of Dietary Supplements by Positioning: % Value 2018-2023

Table 71 - NBO Company Shares of Dietary Supplements: % Value 2019-2023

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

Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2023-2028

Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2023-2028

# Vitamins in France

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Vitamin D and multivitamins lead growth in 2023

Upsurge in vitamin consumption due to increasing stress levels among French population

Women's health and beauty concerns promote vitamin C's growth

## PROSPECTS AND OPPORTUNITIES

As vegan/vegetarian population increases, the necessity for vitamins grows

Positive growth for vitamins to be supported by pharmacists promoting their benefits

Personalisation trend could also boost sales of vitamins

#### CATEGORY DATA

- Table 75 Sales of Vitamins by Category: Value 2018-2023
- Table 76 Sales of Vitamins by Category: % Value Growth 2018-2023
- Table 77 Sales of Multivitamins by Positioning: % Value 2018-2023
- Table 78 NBO Company Shares of Vitamins: % Value 2019-2023
- Table 79 LBN Brand Shares of Vitamins: % Value 2020-2023
- Table 80 Forecast Sales of Vitamins by Category: Value 2023-2028
- Table 81 Forecast Sales of Vitamins by Category: % Value Growth 2023-2028

## Weight Management and Wellbeing in France

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Further declines for weight management and wellbeing in 2023

Competition from alternative solutions as French consumers shift towards a more natural approach to weight management Ozempic emerges as competitor to weight management in France

## PROSPECTS AND OPPORTUNITIES

Weak performance ahead for weight management, as alternative solutions emerge

Gummies to gain traction within weight loss supplements

Tapping into French weight management with holistic approach

#### **CATEGORY DATA**

- Table 82 Sales of Weight Management and Wellbeing by Category: Value 2018-2023
- Table 83 Sales of Weight Management and Wellbeing by Category: % Value Growth 2018-2023
- Table 84 NBO Company Shares of Weight Management and Wellbeing: % Value 2019-2023
- Table 85 LBN Brand Shares of Weight Management and Wellbeing: % Value 2020-2023
- Table 86 Forecast Sales of Weight Management and Wellbeing by Category: Value 2023-2028
- Table 87 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2023-2028

## Herbal/Traditional Products in France

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Preventive health through immunity boost pushes herbal/traditional sales

Trend towards more natural products increases demand for herbal/traditional solutions

CBD-infused products continue to grow and expand across several industries

## PROSPECTS AND OPPORTUNITIES

Herbal/traditional products set for further solid growth over forecast period

Products with a focus on supporting digestive health set to experience demand

Sleep disorders and mental health issues expected to boost growth of herbal/traditional products

## **CATEGORY DATA**

- Table 88 Sales of Herbal/Traditional Products by Category: Value 2018-2023
- Table 89 Sales of Herbal/Traditional Products by Category: % Value Growth 2018-2023
- Table 90 NBO Company Shares of Herbal/Traditional Products: % Value 2019-2023
- Table 91 LBN Brand Shares of Herbal/Traditional Products: % Value 2020-2023
- Table 92 Forecast Sales of Herbal/Traditional Products by Category: Value 2023-2028
- Table 93 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2023-2028

# Paediatric Consumer Health in France

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

"Triple epidemic" drives sales of paediatric consumer health in 2023

Naturalness trend leads parents to choose alternative solutions to paediatric consumer health

Lice treatments with natural positioning lead growth in paediatric dermatologicals

#### PROSPECTS AND OPPORTUNITIES

Further demand for paediatric vitamins and dietary supplements

Changing demographics could have negative effect on paediatric consumer health in France

Mental health issues and higher stress levels likely to benefit some paediatric consumer health products

## **CATEGORY DATA**

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2018-2023

Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2018-2023

Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2019-2023

Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2020-2023

Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2023-2028

Table 99 - Forecast Sales of Paediatric Consumer Health 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/consumer-health-in-france/report.