

# Retail in France

February 2024

Table of Contents

## EXECUTIVE SUMMARY

Retail in 2023: The big picture

2023 as a year of innovations and new concepts

Second-hand trend proves a double-edged sword

What next for retail?

## OPERATING ENVIRONMENT

Informal retail

Opening hours for physical retail

Summary 1 - Standard Opening Hours by Channel Type 2023

Seasonality

Christmas (Noël)

Back to School (La Rentrée)

Sales seasons

## MARKET DATA

Table 1 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2018-2023

Table 2 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2018-2023

Table 3 - Sales in Retail Offline by Channel: Value 2018-2023

Table 4 - Sales in Retail Offline by Channel: % Value Growth 2018-2023

Table 5 - Retail Offline Outlets by Channel: Units 2018-2023

Table 6 - Retail Offline Outlets by Channel: % Unit Growth 2018-2023

Table 7 - Sales in Retail E-Commerce by Product: Value 2018-2023

Table 8 - Sales in Retail E-Commerce by Product: % Value Growth 2018-2023

Table 9 - Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 10 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 11 - Sales in Grocery Retailers by Channel: Value 2018-2023

Table 12 - Sales in Grocery Retailers by Channel: % Value Growth 2018-2023

Table 13 - Grocery Retailers Outlets by Channel: Units 2018-2023

Table 14 - Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 15 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 16 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 17 - Sales in Non-Grocery Retailers by Channel: Value 2018-2023

Table 18 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2018-2023

Table 19 - Non-Grocery Retailers Outlets by Channel: Units 2018-2023

Table 20 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 21 - Retail GBO Company Shares: % Value 2019-2023

Table 22 - Retail GBN Brand Shares: % Value 2020-2023

Table 23 - Retail Offline GBO Company Shares: % Value 2019-2023

Table 24 - Retail Offline GBN Brand Shares: % Value 2020-2023

Table 25 - Retail Offline LBN Brand Shares: Outlets 2020-2023

Table 26 - Retail E-Commerce GBO Company Shares: % Value 2019-2023

Table 27 - Retail E-Commerce GBN Brand Shares: % Value 2020-2023

Table 28 - Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 29 - Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 30 - Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 31 - Non-Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 32 - Non-Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 33 - Non-Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 34 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2023-2028

Table 35 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2023-2028

Table 36 - Forecast Sales in Retail Offline by Channel: Value 2023-2028

Table 37 - Forecast Sales in Retail Offline by Channel: % Value Growth 2023-2028

Table 38 - Forecast Retail Offline Outlets by Channel: Units 2023-2028

Table 39 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2023-2028

Table 40 - Forecast Sales in Retail E-Commerce by Product: Value 2023-2028

Table 41 - Forecast Sales in Retail E-Commerce by Product: % Value Growth 2023-2028

Table 42 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 43 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 44 - Forecast Sales in Grocery Retailers by Channel: Value 2023-2028

Table 45 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2023-2028

Table 46 - Forecast Grocery Retailers Outlets by Channel: Units 2023-2028

Table 47 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

Table 48 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 49 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 50 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2023-2028

Table 51 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2023-2028

Table 52 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2023-2028

Table 53 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

## DISCLAIMER

## SOURCES

Summary 2 - Research Sources

## Convenience Retailers in France

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Convenience stores benefits from fall in q-commerce

Changes in operating conditions impact performance

Carrefour retains overall lead in convenience stores in terms of value share in 2023

### PROSPECTS AND OPPORTUNITIES

Convenience stores set to forge ahead

Franchise model will continue to dominate convenience store format

Digitalisation will continue apace, transforming and updating the channel

### CHANNEL DATA

Table 54 - Convenience Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 55 - Convenience Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 56 - Sales in Convenience Retailers by Channel: Value 2018-2023

Table 57 - Sales in Convenience Retailers by Channel: % Value Growth 2018-2023

Table 58 - Convenience Retailers GBO Company Shares: % Value 2019-2023

Table 59 - Convenience Retailers GBN Brand Shares: % Value 2020-2023

Table 60 - Convenience Retailers LBN Brand Shares: Outlets 2020-2023

Table 61 - Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 62 - Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 63 - Forecast Sales in Convenience Retailers by Channel: Value 2023-2028

Table 64 - Forecast Sales in Convenience Retailers by Channel: % Value Growth 2023-2028

## Supermarkets in France

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Supermarkets sees new and robust growth over 2022- 2013  
ITM maintains leadership and focuses on continued expansion  
Louis Delhaize exits France

## PROSPECTS AND OPPORTUNITIES

Steady growth forecast as supermarkets matures with increased focus on recycling  
Anti-waste law will support expansion of sustainable offerings  
Technology to continue to inform innovation

## CHANNEL DATA

Table 65 - Supermarkets: Value Sales, Outlets and Selling Space 2018-2023  
Table 66 - Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023  
Table 67 - Supermarkets GBO Company Shares: % Value 2019-2023  
Table 68 - Supermarkets GBN Brand Shares: % Value 2020-2023  
Table 69 - Supermarkets LBN Brand Shares: Outlets 2020-2023  
Table 70 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028  
Table 71 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## Hypermarkets in France

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Hypermarkets continues to enjoy steady revenue growth despite limited expansion  
Casino banks on hypermarket sell-off  
E Leclerc continues to rise

### PROSPECTS AND OPPORTUNITIES

Market size will remain relatively stable amid changing channel dynamics  
Shopping-as-entertainment trend to expand throughout hypermarkets  
Shuffles in competitive landscape anticipated during forecast period

### CHANNEL DATA

Table 72 - Hypermarkets: Value Sales, Outlets and Selling Space 2018-2023  
Table 73 - Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023  
Table 74 - Hypermarkets GBO Company Shares: % Value 2019-2023  
Table 75 - Hypermarkets GBN Brand Shares: % Value 2020-2023  
Table 76 - Hypermarkets LBN Brand Shares: Outlets 2020-2023  
Table 77 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028  
Table 78 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## Discounters in France

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Discounters continues to benefit from inflation crisis  
Lidl maintains leadership despite lack of dynamism in 2023  
Aldi slows expansion amid intensified competition

### PROSPECTS AND OPPORTUNITIES

Ongoing waves of openings during continuous crisis  
Blurred lines between discounters and competing channels

Competition will intensify within discounting channel

## CHANNEL DATA

Table 79 - Discounters: Value Sales, Outlets and Selling Space 2018-2023

Table 80 - Discounters: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 81 - Discounters GBO Company Shares: % Value 2019-2023

Table 82 - Discounters GBN Brand Shares: % Value 2020-2023

Table 83 - Discounters LBN Brand Shares: Outlets 2020-2023

Table 84 - Discounters Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 85 - Discounters Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## Small Local Grocers in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Small local grocers benefit from long-standing relationships with local consumers

Demand for organic groceries remains under pressure

Biocoop retains leadership of a highly fragmented environment

### PROSPECTS AND OPPORTUNITIES

Economic recovery to boost sales for more small local grocers while organic players need to adapt to combat falling demand

Private label products to gain more focus from players

Sustainability trends continue transforming small local grocery stores

## CHANNEL DATA

Table 86 - Small Local Grocers: Value Sales, Outlets and Selling Space 2018-2023

Table 87 - Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 88 - Small Local Grocers GBO Company Shares: % Value 2019-2023

Table 89 - Small Local Grocers GBN Brand Shares: % Value 2020-2023

Table 90 - Small Local Grocers LBN Brand Shares: Outlets 2020-2023

Table 91 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 92 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## General Merchandise Stores in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Recovery in tourism supports sales in department stores

Actions maintains lead over variety stores

Galleries Lafayette maintains department store leadership

### PROSPECTS AND OPPORTUNITIES

Department stores players to focus more on European and local consumers

Variety stores holds potential for further expansion

Costco will grow though faces challenges

## CHANNEL DATA

Table 93 - General Merchandise Stores: Value Sales, Outlets and Selling Space 2018-2023

Table 94 - General Merchandise Stores: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 95 - Sales in General Merchandise Stores by Channel: Value 2018-2023

Table 96 - Sales in General Merchandise Stores by Channel: % Value Growth 2018-2023

Table 97 - General Merchandise Stores GBO Company Shares: % Value 2019-2023

Table 98 - General Merchandise Stores GBN Brand Shares: % Value 2020-2023

Table 99 - General Merchandise Stores LBN Brand Shares: Outlets 2020-2023

Table 100 - General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 101 - General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 102 - Forecast Sales in General Merchandise Stores by Channel: Value 2023-2028

Table 103 - Forecast Sales in General Merchandise Stores by Channel: % Value Growth 2023-2028

## Apparel and Footwear Specialists in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Inflation and post-pandemic normalisation slow growth in 2023

Combined effects of economic constraints and climate change boost demand for second hand

French players represent rising threat to Inditex

#### PROSPECTS AND OPPORTUNITIES

Falling inflation will make way for expansion, while Shein comes under greater scrutiny

Second-hand trend likely to be taken up by leading players

Competition to intensify over the forecast period, accelerating digital development

#### CHANNEL DATA

Table 104 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 105 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 106 - Apparel and Footwear Specialists GBO Company Shares: % Value 2019-2023

Table 107 - Apparel and Footwear Specialists GBN Brand Shares: % Value 2020-2023

Table 108 - Apparel and Footwear Specialists LBN Brand Shares: Outlets 2020-2023

Table 109 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 110 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## Appliances and Electronics Specialists in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

2023 sees sales slump following previous year's slowdown

New entrants bet on eco-friendly products

Établissements Darty et Fils retains overall leadership thanks to diversified offer

#### PROSPECTS AND OPPORTUNITIES

Appliances and electronics retailers set to benefit from changes in operating environment

Competition with other channels will continue to intensify

Innovation will remain centred on sustainability

#### CHANNEL DATA

Table 111 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 112 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 113 - Appliances and Electronics Specialists GBO Company Shares: % Value 2019-2023

Table 114 - Appliances and Electronics Specialists GBN Brand Shares: % Value 2020-2023

Table 115 - Appliances and Electronics Specialists LBN Brand Shares: Outlets 2020-2023

Table 116 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 117 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

## Home Products Specialists in France

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Pets still hold strong place in families  
Home improvement and gardening stores suffers impact of rising cost of living  
Ikea gains traction in France

## PROSPECTS AND OPPORTUNITIES

Wave of new openings in pet shops and superstores will boost overall category performance  
Ultra-proximity trend set to expand in DIY  
Sustainability will remain central to development in home and garden, while home wares and home furnishing stores will face rising competition from variety stores and e-commerce

## CHANNEL DATA

Table 118 - Home Products Specialists: Value Sales, Outlets and Selling Space 2018-2023  
Table 119 - Home Products Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023  
Table 120 - Sales in Home Products Specialists by Channel: Value 2018-2023  
Table 121 - Sales in Home Products Specialists by Channel: % Value Growth 2018-2023  
Table 122 - Home Products Specialists GBO Company Shares: % Value 2019-2023  
Table 123 - Home Products Specialists GBN Brand Shares: % Value 2020-2023  
Table 124 - Home Products Specialists LBN Brand Shares: Outlets 2020-2023  
Table 125 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028  
Table 126 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028  
Table 127 - Forecast Sales in Home Products Specialists by Channel: Value 2023-2028  
Table 128 - Forecast Sales in Home Products Specialists by Channel: % Value Growth 2023-2028

## Health and Beauty Specialists in France

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Beauty specialists and optical goods retailers benefit from revived routines post-pandemic  
Pharmacies maintains momentum built during the pandemic but faces intensified competition as discount model spreads  
Small beauty specialist players struggle to remain afloat

## PROSPECTS AND OPPORTUNITIES

Demand for beauty products will stabilise as old habits return, with solid cosmetics set to see rising interest  
Lack of pharmacists may impact channel's progress  
Omnichannel will remain the standard during the forecast period

## CHANNEL DATA

Table 129 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space 2018-2023  
Table 130 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023  
Table 131 - Sales in Health and Beauty Specialists by Channel: Value 2018-2023  
Table 132 - Sales in Health and Beauty Specialists by Channel: % Value Growth 2018-2023  
Table 133 - Health and Beauty Specialists GBO Company Shares: % Value 2019-2023  
Table 134 - Health and Beauty Specialists GBN Brand Shares: % Value 2020-2023  
Table 135 - Health and Beauty Specialists LBN Brand Shares: Outlets 2020-2023  
Table 136 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028  
Table 137 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028  
Table 138 - Forecast Sales in Health and Beauty Specialists by Channel: Value 2023-2028  
Table 139 - Forecast Sales in Health and Beauty Specialists by Channel: % Value Growth 2023-2028

## Vending in France

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Company clients remain central to category development  
Category benefits from returning inbound travellers and tourists  
Selecta stays on top of overall vending in 2023

## PROSPECTS AND OPPORTUNITIES

Vending to see further development during forecast period  
Continued success for vending in France's rural regions as automated shops expand  
Vending show emphasises tech advances, while category faces further challenges in terms of sustainability

## CHANNEL DATA

Table 140 - Vending by Product: Value 2018-2023  
Table 141 - Vending by Product: % Value Growth 2018-2023  
Table 142 - Vending GBO Company Shares: % Value 2019-2023  
Table 143 - Vending GBN Brand Shares: % Value 2020-2023  
Table 144 - Vending Forecasts by Product: Value 2023-2028  
Table 145 - Vending Forecasts by Product: % Value Growth 2023-2028

## [Direct Selling in France](#)

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

Overall sales continue to slump in 2023 as appliances and electronics tumbles downwards  
Yesterday's losers are today's winners  
Good news for Vorwerk, Herbalife, and Henri Maire

### PROSPECTS AND OPPORTUNITIES

Shift towards e-commerce set to accelerate over the forecast period  
Success depends on new recruits  
More players will invest in an omnichannel approach

### CHANNEL DATA

Table 146 - Direct Selling by Product: Value 2018-2023  
Table 147 - Direct Selling by Product: % Value Growth 2018-2023  
Table 148 - Direct Selling GBO Company Shares: % Value 2019-2023  
Table 149 - Direct Selling GBN Brand Shares: % Value 2020-2023  
Table 150 - Direct Selling Forecasts by Product: Value 2023-2028  
Table 151 - Direct Selling Forecasts by Product: % Value Growth 2023-2028

## [Retail E-Commerce in France](#)

## KEY DATA FINDINGS

### 2023 DEVELOPMENTS

E-commerce regains strength in 2023 though overall category sales are low  
Drive/click-and-collect services see growth curbed in 2023  
Omnichannel players see more success than pure online operators

### PROSPECTS AND OPPORTUNITIES

E-commerce channel faces obstacles to faster growth in early forecast period  
Pre-pandemic dynamism set to return  
Q-commerce faces continued struggles

### CHANNEL DATA



Table 152 - Retail E-Commerce by Channel: Value 2017-2022

Table 153 - Retail E-Commerce by Channel: % Value Growth 2017-2022

Table 154 - Retail E-Commerce by Product: Value 2017-2022

Table 155 - Retail E-Commerce by Product: % Value Growth 2017-2022

Table 156 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 157 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 158 - Forecast Retail E-Commerce by Channel: Value 2022-2027

Table 159 - Forecast Retail E-Commerce by Channel: % Value Growth 2022-2027

Table 160 - Forecast Retail E-Commerce by Product: Value 2022-2027

Table 161 - Forecast Retail E-Commerce by Product: % Value Growth 2022-2027

## 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/retail-in-france/report](http://www.euromonitor.com/retail-in-france/report).