

# Tissue and Hygiene in France

March 2025

Table of Contents

# Tissue and Hygiene in France

# EXECUTIVE SUMMARY

Tissue and hygiene in 2024: The big picture 2024 key trends Competitive landscape Retail developments What next for tissue and hygiene?

## MARKET INDICATORS

Table 1 - Birth Rates 2019-2024Table 2 - Infant Population 2019-2024Table 3 - Female Population by Age 2019-2024Table 4 - Total Population by Age 2019-2024Table 5 - Households 2019-2024Table 6 - Forecast Infant Population 2024-2029Table 7 - Forecast Female Population by Age 2024-2029Table 8 - Forecast Total Population by Age 2024-2029Table 9 - Forecast Households 2024-2029

#### MARKET DATA

 Table 10 - Retail Sales of Tissue and Hygiene by Category: Value 2019-2024

Table 11 - Retail Sales of Tissue and Hygiene by Category: % Value Growth 2019-2024

Table 12 - NBO Company Shares of Retail Tissue and Hygiene: % Value 2020-2024

 Table 13 - LBN Brand Shares of Retail Tissue and Hygiene: % Value 2021-2024

Table 14 - Penetration of Private Label in Retail Tissue and Hygiene by Category: % Value 2019-2024

Table 15 - Distribution of Retail Tissue and Hygiene by Format: % Value 2019-2024

Table 16 - Distribution of Retail Tissue and Hygiene by Format and Category: % Value 2024

Table 17 - Forecast Retail Sales of Tissue and Hygiene by Category: Value 2024-2029

Table 18 - Forecast Retail Sales of Tissue and Hygiene by Category: % Value Growth 2024-2029

# DISCLAIMER

## SOURCES

Summary 1 - Research Sources

Away-From-Home Tissue and Hygiene in France

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

AFH adult incontinence drives volume growth in 2024 Sales supported by post-pandemic patterns, with Essity leading through Tork brand Decline in value persists despite help from horeca channels

# PROSPECTS AND OPPORTUNITIES

Tourism should help support sales during forecast period Adult incontinence set to rise further Recent inflation to leave lasting impact

# CATEGORY DATA

Table 19 - Sales of Away-From-Home Tissue and Hygiene by Category: Value 2019-2024Table 20 - Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2019-2024Table 21 - Sales of Away-From-Home Paper Towels by Type: % Value 2019-2024

Table 22 - Distribution of Away-From-Home Tissue and Hygiene by Format: % Value 2019-2024Table 23 - Distribution of Away-From-Home Tissue and Hygiene by Format and Category: % Value 2024Table 24 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: Value 2024-2029Table 25 - Forecast Sales of Away-From-Home Tissue and Hygiene by Category: % Value Growth 2024-2029

# Retail Adult Incontinence in France

## **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Slowed growth for retail adult incontinence in 2024 Essity leads companies, while P&G's Always Discreet heads up brands Hypermarkets as key channel, and innovation focuses on sustainability

## PROSPECTS AND OPPORTUNITIES

Steady rises predicted for forecast period Private label to maintain high appeal Growth supported by national health system, while reusable options hold potential for growth

## CATEGORY DATA

Table 26 - Sales of Retail Adult Incontinence by Category: Value 2019-2024
Table 27 - Sales of Retail Adult Incontinence by Category: % Value Growth 2019-2024
Table 28 - NBO Company Shares of Retail Adult Incontinence: % Value 2020-2024
Table 29 - LBN Brand Shares of Retail Adult Incontinence: % Value 2021-2024
Table 30 - Forecast Sales of Retail Adult Incontinence by Category: Value 2024-2029
Table 31 - Forecast Sales of Retail Adult Incontinence by Category: % Value Growth 2024-2029

# Nappies/Diapers/Pants in France

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Category sees subdued performances in line with demographic trends Private label players reap rewards while P&G still leads overall Green brands see greater interest in 2024

## PROSPECTS AND OPPORTUNITIES

Sales of nappies/diapers/pants set for marginal growth 2025 will be an extension of 2024 Green variants will drive value sales while private labels hold high volume sales potential

#### CATEGORY DATA

Table 32 - Retail Sales of Nappies/Diapers/Pants by Category: Value 2019-2024

- Table 33 Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2019-2024
- Table 34 NBO Company Shares of Retail Nappies/Diapers/Pants: % Value 2020-2024
- Table 35 LBN Brand Shares of Retail Nappies/Diapers/Pants: % Value 2021-2024
- Table 36 Forecast Retail Sales of Nappies/Diapers/Pants by Category: Value 2024-2029
- Table 37 Forecast Retail Sales of Nappies/Diapers/Pants by Category: % Value Growth 2024-2029

## Menstrual Care in France

# KEY DATA FINDINGS

# 2024 DEVELOPMENTS

Value sales decline while volumes rise in 2024

Procter & Gamble maintains overall leadership of menstrual care Hypermarkets lead amid widespread decline for distribution channels

## PROSPECTS AND OPPORTUNITIES

Positive growth projected for menstrual care E-commerce set to rebound in late forecast period Persistent and rising threat from reusable alternatives

## CATEGORY DATA

Table 38 - Retail Sales of Menstrual Care by Category: Value 2019-2024
Table 39 - Retail Sales of Menstrual Care by Category: % Value Growth 2019-2024
Table 40 - Retail Sales of Tampons by Application Format: % Value 2019-2024
Table 41 - NBO Company Shares of Retail Menstrual Care: % Value 2020-2024
Table 42 - LBN Brand Shares of Retail Menstrual Care: % Value 2021-2024
Table 43 - Forecast Retail Sales of Menstrual Care by Category: Value 2024-2029
Table 44 - Forecast Retail Sales of Menstrual Care by Category: % Value Growth 2024-2029

## Wipes in France

**KEY DATA FINDINGS** 

# 2024 DEVELOPMENTS

Wipes falls faster in 2024 P&G remains ahead of the rest thanks to Pampers and Swiffer brands Outdoor use as bigger supporter of sales than indoor use

## PROSPECTS AND OPPORTUNITIES

Anticipated return to positive growth for wipes in France Eco trends to drive development, though category faces competition from alternative solutions Moist toilet wipes to see further growth

#### CATEGORY DATA

Table 45 - Retail Sales of Wipes by Category: Value 2019-2024Table 46 - Retail Sales of Wipes by Category: % Value Growth 2019-2024Table 47 - NBO Company Shares of Retail Wipes: % Value 2020-2024Table 48 - LBN Brand Shares of Retail Wipes: % Value 2021-2024Table 49 - Forecast Retail Sales of Wipes by Category: Value 2024-2029Table 50 - Forecast Retail Sales of Wipes by Category: % Value Growth 2024-2029

## Retail Tissue in France

# **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Retail tissue struggles against uncertain economic background in 2024 Essity holds on to number one spot in terms of value share Hypermarkets leads distribution, while recycled options remain slow to gain ground

## PROSPECTS AND OPPORTUNITIES

Boxed facial tissues set to lead value growth during forecast period Consumers likely to remain cautious spenders Sustainability and health as central to innovation

## CATEGORY DATA

Table 51 - Retail Sales of Tissue by Category: Value 2019-2024

Table 52 - Retail Sales of Tissue by Category: % Value Growth 2019-2024Table 53 - NBO Company Shares of Retail Tissue: % Value 2020-2024Table 54 - LBN Brand Shares of Retail Tissue: % Value 2021-2024Table 55 - Forecast Retail Sales of Tissue by Category: Value 2024-2029Table 56 - Forecast Retail Sales of Tissue by Category: % Value Growth 2024-2029

# Rx/Reimbursement Adult Incontinence in France

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Essential nature of products ensures continued growth New law for Rx menstrual care products Rx/reimbursement adult incontinence remains a limited area in France

## PROSPECTS AND OPPORTUNITIES

Growth to follow demographic trends Rx menstrual care products to have little impact on rx adult incontinence Restricted scope will remain

## CATEGORY DATA

Table 57 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2019-2024Table 58 - Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2019-2024Table 59 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP 2024-2029Table 60 - Forecast Sales of Rx/Reimbursement Adult Incontinence: Total Value MSP Growth 2024-2029

# 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/tissue-and-hygiene-in-france/report.