

Consumer Health in France

September 2024

Table of Contents

Consumer Health in France

EXECUTIVE SUMMARY

Consumer health in 2024: The big picture

2024 key trends

Competitive landscape

Retailing developments

What next for consumer health?

MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2019-2024

Table 2 - Life Expectancy at Birth 2019-2024

MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2019-2024

Table 4 - Sales of Consumer Health by Category: % Value Growth 2019-2024

Table 5 - NBO Company Shares of Consumer Health: % Value 2020-2024

Table 6 - LBN Brand Shares of Consumer Health: % Value 2021-2024

Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2019-2024

Table 8 - Distribution of Consumer Health by Format: % Value 2019-2024

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2024

Table 10 - Forecast Sales of Consumer Health by Category: Value 2024-2029

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2024-2029

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

2024 DEVELOPMENTS

Analgesics beset by challenges in 2024

Despite the popularity of acetaminophen, ibuprofen's woes erode overall category potential

Doliprane's popularity consolidates Sanofi's leadership position, while consumers fret over dearth of medical professionals

PROSPECTS AND OPPORTUNITIES

Self-medication on the rise, but uncertainty around pseudoephedrine dampens expectations for overall category

Retailers and manufacturers look to avoid shortages

Sanofi to divest itself of consumer health arm

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2019-2024

Table 13 - Sales of Analgesics by Category: % Value Growth 2019-2024

Table 14 - NBO Company Shares of Analgesics: % Value 2020-2024

Table 15 - LBN Brand Shares of Analgesics: % Value 2021-2024

Table 16 - Forecast Sales of Analgesics by Category: Value 2024-2029

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2024-2029

Sleep Aids in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sleep aids continues to reap benefits from consumer stress and anxiety

Gummies gain rapid ground

Sanofi's Novanuit remains overall leader

PROSPECTS AND OPPORTUNITIES

Demand set to continue throughout forecast period, despite challenges ahead

Possible new competition from other consumer health options

Potential for expansion in sea magnesium, melatonin and CBD

CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2019-2024

Table 19 - Sales of Sleep Aids: % Value Growth 2019-2024

Table 20 - NBO Company Shares of Sleep Aids: % Value 2020-2024

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2021-2024

Table 22 - Forecast Sales of Sleep Aids: Value 2024-2029

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2024-2029

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

KEY DATA FINDINGS

2024 DEVELOPMENTS

2024 sees modest sales performance

Combination products witness another year of double-digit decline amid pseudoephedrine controversy

Ricola benefits from French consumers' sweet tooth

PROSPECTS AND OPPORTUNITIES

As flu seasons settle down the impact will be offset by rising demand for antihistamines/allergy remedies More innovation necessary amid intensifying competition, while ageing population will help to sustain sales Growing preference among local consumers for natural remedies

CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2019-2024

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2019-2024

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2020-2024

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2024

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2024-2029

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2024-2029

Dermatologicals in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Dermatologicals deemed less important than other OTC offerings during times of financial uncertainty Growth driven by return to pre-pandemic patterns Stress and anxiety boost performance of hair loss treatments

PROSPECTS AND OPPORTUNITIES

Demographic and climate issues set to impact forecast performance

Continuous challenge from unclear positioning for dermatologicals

Under-exploited potential for vaginal antifungals, while medicated shampoos will maintain stable sales

CATEGORY DATA

Table 30 - Sales of Dermatologicals by Category: Value 2019-2024

Table 31 - Sales of Dermatologicals by Category: % Value Growth 2019-2024

Table 32 - NBO Company Shares of Dermatologicals: % Value 2020-2024

Table 33 - LBN Brand Shares of Dermatologicals: % Value 2021-2024

Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2021-2024

Table 35 - Forecast Sales of Dermatologicals by Category: Value 2024-2029

Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2024-2029

Digestive Remedies in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Robust growth results from consumer stress and sharp price hikes

Tourism boost helps motion sickness remedies, while Johnson & Johnson leads by a slight margin

Focus on gut health and demand for probiotics present challenge to growth

PROSPECTS AND OPPORTUNITIES

Stress and ageing to maintain future category growth

PPIs faces concerns over possible product misuse

Natural alternatives pose threat to OTC remedies

CATEGORY DATA

Table 37 - Sales of Digestive Remedies by Category: Value 2019-2024

Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2019-2024

Table 39 - NBO Company Shares of Digestive Remedies: % Value 2020-2024

Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2021-2024

Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2024-2029

Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2024-2029

Eye Care in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increase in pollen and airborne allergens boost category performance

Modern lifestyles also aid performance

Competitive landscape remains stable

PROSPECTS AND OPPORTUNITIES

Rising prevalence of myopia in France

Demand for eye care to forge ahead over the forecast period

OTC eye care evolves amid ophthalmologist shortages

CATEGORY DATA

Table 43 - Sales of Eye Care by Category: Value 2019-2024

Table 44 - Sales of Eye Care by Category: % Value Growth 2019-2024

Table 45 - NBO Company Shares of Eye Care: % Value 2020-2024

Table 46 - LBN Brand Shares of Eye Care: % Value 2021-2024

Table 47 - Forecast Sales of Eye Care by Category: Value 2024-2029

Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2024-2029

NRT Smoking Cessation Aids in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Reimbursement remains key for category, limiting OTC penetration Oral formats dominate, while players focus on mobile apps Leading players take divergent approaches to boosting sales

PROSPECTS AND OPPORTUNITIES

Category will struggle over the forecast period

E-vapour products remain a serious competitive threat

Natural products unlikely to make any headway in NRT smoking cessation aids

CATEGORY INDICATORS

Table 49 - Number of Smokers by Gender 2019-2024

CATEGORY DATA

Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2019-2024

Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2019-2024

Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2020-2024

Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2021-2024

Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2024-2029

Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2024-2029

Wound Care in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Poor performance for wound care in 2024 URGO maintains leadership of overall wound care Ongoing threat to pharmacies from grocery retail

PROSPECTS AND OPPORTUNITIES

Maturity contributes to forecast disappointing performance Pure online and private label players hold further growth potential Limited room for growth in products with value-added features

CATEGORY DATA

Table 56 - Sales of Wound Care by Category: Value 2019-2024

Table 57 - Sales of Wound Care by Category: % Value Growth 2019-2024

Table 58 - NBO Company Shares of Wound Care: % Value 2020-2024

Table 59 - LBN Brand Shares of Wound Care: % Value 2021-2024

Table 60 - Forecast Sales of Wound Care by Category: Value 2024-2029

Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2024-2029

Sports Nutrition in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Growth driven rising numbers of athletes interested in endurance sports and fitness

Explosion of gyms versus running and home-based training

Mainstream players face a new generation of competitors

PROSPECTS AND OPPORTUNITIES

Plenty of room for growth in a still-evolving market

Players to focus on finding new target audiences

Anticipated influx of new products and formats

CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2019-2024

Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2019-2024

Table 64 - NBO Company Shares of Sports Nutrition: % Value 2020-2024

Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2021-2024

Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2024-2029

Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2024-2029

Dietary Supplements in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Another strong year of growth as consumers continue to opt for natural fixes

Category-wide dynamism is thanks to the promise of functional ingredients

Dermapharm leads while BMS enters the category with innovative offering

PROSPECTS AND OPPORTUNITIES

Favourable outlook thanks to increased focus on more natural products

Social media activity expected to drive growth

Pharmacies likely to reinforce leadership, as players focus more on benefits of eye health products

CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2019-2024

Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2019-2024

Table 70 - Sales of Dietary Supplements by Positioning: % Value 2019-2024

Table 71 - NBO Company Shares of Dietary Supplements: % Value 2020-2024

Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2021-2024

Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2024-2029

Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2024-2029

Vitamins in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Return to pre-pandemic trends for vitamins in France

Multivitamins too expensive for many, as vitamin D recovers from previous year's dip

Bayer rises in 2024

PROSPECTS AND OPPORTUNITIES

Growth set to continue during forecast period, benefitting from dietary trends

Multivitamin growth to stay stable

Vitamin D recommendation expected to accelerate growth

CATEGORY DATA

- Table 75 Sales of Vitamins by Category: Value 2019-2024
- Table 76 Sales of Vitamins by Category: % Value Growth 2019-2024
- Table 77 Sales of Multivitamins by Positioning: % Value 2019-2024
- Table 78 NBO Company Shares of Vitamins: % Value 2020-2024
- Table 79 LBN Brand Shares of Vitamins: % Value 2021-2024
- Table 80 Forecast Sales of Vitamins by Category: Value 2024-2029
- Table 81 Forecast Sales of Vitamins by Category: % Value Growth 2024-2029

Weight Management and Wellbeing in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Weight management and wellbeing continues to suffer in 2024

Evolving demand undermines interest in traditional category products

Detox, drainage and gummies

PROSPECTS AND OPPORTUNITIES

Category faces difficult road ahead

Customised coaching and new approaches

Ongoing development for supplement nutrition and slimming teas

CATEGORY DATA

- Table 82 Sales of Weight Management and Wellbeing by Category: Value 2019-2024
- Table 83 Sales of Weight Management and Wellbeing by Category: % Value Growth 2019-2024
- Table 84 NBO Company Shares of Weight Management and Wellbeing: % Value 2020-2024
- Table 85 LBN Brand Shares of Weight Management and Wellbeing: % Value 2021-2024
- Table 86 Forecast Sales of Weight Management and Wellbeing by Category: Value 2024-2029
- Table 87 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2024-2029

Herbal/Traditional Products in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

French consumers continue to shift towards herbal/traditional products

Sleep issues and stress support sales, as natural trends gain traction

Dermapharm as leading GBO through acquisition of Laboratoires Arkopharma, and demand for CBD-based variants rises rapidly

PROSPECTS AND OPPORTUNITIES

Ongoing favourable outlook for herbal/traditional products

NRT smoking cessation aids unlikely to be impacted by herbal and natural trends

Rising digestive complaints will support further category growth

CATEGORY DATA

- Table 88 Sales of Herbal/Traditional Products by Category: Value 2019-2024
- Table 89 Sales of Herbal/Traditional Products by Category: % Value Growth 2019-2024
- Table 90 NBO Company Shares of Herbal/Traditional Products: % Value 2020-2024
- Table 91 LBN Brand Shares of Herbal/Traditional Products: % Value 2021-2024
- Table 92 Forecast Sales of Herbal/Traditional Products by Category: Value 2024-2029
- Table 93 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2024-2029

Paediatric Consumer Health in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Ambivalent performance from paediatric consumer health in 2024

Non-chemical lice treatments gain momentum

Naturalness trend spreads throughout overall category

PROSPECTS AND OPPORTUNITIES

Changing demographics present challenges to growth

Rising demand for paediatric vitamins and dietary supplements with natural positioning

Paediatric consumer health to be further affected by shortages

CATEGORY DATA

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2019-2024

Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2019-2024

Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2020-2024

Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2021-2024

Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2024-2029

Table 99 - Forecast Sales of Paediatric Consumer Health by Category: % Value 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/consumer-health-in-france/report.