

# Beauty and Personal Care Retailing - France - January 2021

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## This report looks at the following areas:

- The impact of COVID-19 on the beauty and personal care retailing sector.
- How people shop for beauty and personal care products and which retailers they use.
- The winners and losers in the beauty and personal care retailing sector since the start of the COVID-19 outbreak.
- How behaviours of beauty and personal care shoppers have changed since the start of the COVID-19 outbreak.
- The growth of the online channel within the beauty and personal care category and the boost given to it by the COVID-19 outbreak.

Growth in consumer spending on personal care goods in France was already weak in 2019. In 2019 it grew by just 0.4% to €21.7 billion, which is only €300 million larger than in 2015. The COVID-19 epidemic has had serious consequences for the beauty and personal care sector, where much spending is discretionary and new product launches are a key driver of growth. Our COVID-19 tracker data (run 7-15 January) showed that 25% of French adults said they were buying less or no BPC items compared to before the COVID-19 outbreak. We estimate that market spending shrank by 6% in 2020 as a result of two national lockdowns, curfews and reduced footfall in stores due to safety concerns.

Sephora dominates the specialists sector, with a share of 18% of all sector sales in 2019. The two largest rivals are Douglas-owned Nocibé and botanical brand Yves Rocher, both of a similar size with 14%. Marionnaud is the only other perfumery chain of any size, the rest being made up of smaller, niche players, such as Kiko Milano (cosmetics) and Aroma-Zone (make-your-own products) and some groupings of independents.

Online was already a significant channel for BPC spending and it grew strongly during 2020, as retailers developed new ways to engage digitally with customers and improved their click&collect and home delivery options.



“France has experienced two national lockdowns, as well as a nationwide curfew and restrictions on store opening times. This has shifted a large amount of spending on BPC online and forced many specialists to develop or accelerate their internet offer. Many have showed real adaptability, particularly through digitization of areas such as online consultations and live-streaming events.”

– Natalie Macmillan, Sr

European Retail Analyst  
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