

# Beauty & Personal Care Retailing - France - 2023

Report Price: £1095 | \$1495 | €1295

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## This report looks at the following areas:

- The impact of the cost of living crisis on the beauty and personal care sector and how savvy shopping consumers are adapting
- Channels used to shop for beauty and personal care goods and which retailers they use
- Key strategies adopted by consumers to cut back on beauty and personal care spending during the cost of living crisis
- Attitudes of beauty and personal care shoppers towards areas of innovations among retailers.

Post-pandemic, the specialist beauty retailers in France are gaining momentum and grew sales by 20% in 2022. Higher prices played a part, but the return to work and socialising has increased demand and a lot of spending has been redirected back to stores.

As a partly discretionary category, BPC is vulnerable to the effects of the cost of living crisis on consumers. Many are cutting back and reprioritising, with implications for more premium beauty retailers. However, the squeeze also opens up opportunities. Brand perceptions have changed and people understand that own-label does not necessarily equate to poor quality or reduced performance. There is also potential to promote elements such as durability and multi-functionality of products, and the positive aspect of more sustainable and simpler beauty routines.

The online channel received a major boost during the pandemic and the options for shoppers are diversifying, eating into the share of the store-based specialists. Thanks to the marketplace model, people can now buy easily beauty products from generalists such as Amazon and fashion retailers like Zalando. Many beauty brands are selling DTC via their own websites, and even pharmacies are moving online. The grocery channel too is capturing more spending, thanks to own-label development and the launch of more masstige products, which promise premium style products at accessible price points.



"The beauty retail sector in France was heavily penalized by the health crisis, but looks to be regaining momentum. The end of obligatory face coverings, the return to face-to-face working and growth in tourist numbers have all had a positive effect on demand for beauty products."

**- Natalie Macmillan, Senior European Retail Analyst, March 2023**

## Buy this report now

|          |                      |
|----------|----------------------|
| Visit    | store.mintel.com     |
| EMEA     | +44 (0) 20 7606 4533 |
| Brazil   | 0800 095 9094        |
| Americas | +1 (312) 943 5250    |
| China    | +86 (21) 6032 7300   |
| APAC     | +61 (0) 2 8284 8100  |

## Beauty & Personal Care Retailing - France - 2023

Report Price: £1095 | \$1495 | €1295

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

The beauty sector thrives on innovation and new products. Retailers should be looking to the future in terms of how to establish and maintain contact with customers. Technology is enabling colour matching and skin analysis even online, and providing fun and engaging ways to experiment in-store. Social commerce is growing rapidly, and influencers have enormous power, especially with the youngest generations. Areas such as the metaverse and AR/VR may not be as far away as they seem and progressive retailers need to be keeping abreast of trends and developments here.



### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

## Table of Contents

### OVERVIEW

- Key issues covered in this Report
- Market context
- Areas covered in this Report

### EXECUTIVE SUMMARY

- **The five-year outlook for BPC retailing**  
Figure 1: France: Outlook for BPC retailing, 2023-28
- **The market**
- **A complex economic and commercial environment**
- **Spending on BPC rebounded in 2021, but has not reached pre-pandemic levels**  
Figure 2: France: Consumer spending on beauty and personal care goods (including VAT), 2016-22
- **Beauty specialists' sales recover**  
Figure 3: France: Health & beauty specialists' sales (excluding VAT), 2016-24
- **Increasingly diverse online channel continues to grow for BPC shopping**
- **The consumer**
- **92% of consumers purchase beauty and personal care products**  
Figure 4: France: Products purchased in the last year, 2022
- **Grocery retailers the most popular destination for buying BPC**  
Figure 5: France: Where they purchased beauty and personal care items in the last 12 months, 2022
- **Stockpiling, shopping around for the best prices and opting for lower-priced products**  
Figure 6: France: beauty and personal care products buyers cost savings measures, 2022
- **Efforts to minimise packaging waste will win customer loyalty**  
Figure 7: France: attitudes to innovations, 2022
- **Convenience of one stop BPC destination makes supermarkets appeal**  
Figure 8: France: attitudes to innovations, 2022
- **Companies and brands**  
Figure 9: France: Leading beauty specialists: shares of all beauty specialists' sales, 2021

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## ISSUES AND INSIGHTS

- **How can BPC retailers in France help their customers through the income squeeze?**
- **How can BPC retailers reach their future customers?**
- **Emphasise pleasure and fun**
- **Use social media**
- **Find new ways for consumers to interact and engage with beauty**
- **Build a community**

## THE MARKET

- **Spending rebounded in 2021, but has not reached pre-pandemic levels**  
Figure 10: France: Consumer spending on beauty and personal care (including VAT), 2017-22
- **Beauty specialists' sales recover**  
Figure 11: France: Health & beauty specialists' sales (excluding VAT), 2017-24
- **Channels to market**

## MARKET DRIVERS

- **Inflation and the Ukraine conflict are holding back economic growth**  
Figure 12: France: key economic projections, annual percentage change, 2019-25
- **A government "shield" on energy price rises is protecting consumers to some degree**
- **But consumer spending power is still constrained**  
Figure 13: France: Financial confidence trend data, 2022-23  
Figure 14: France: Anticipated behaviour changes as a result of rising prices, 2022-23
- **Soaring inflation in personal care**  
Figure 15: France: Consumer prices \* of personal care items, Annual % change, 2017-22  
Figure 16: France: Consumer price inflation (HICP \*) on personal care products and services, annual % change, 2021-23
- **The income squeeze is affecting BPC shopping behaviours**  
Figure 17: France: Income Squeeze Shopping Behaviours in BPC, 2022
- **Beauty trends**
- **The impact of social networks on the consumption of beauty products**  
Figure 18: France: Beauty/grooming routine behaviours, 2023

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

|          |                      |
|----------|----------------------|
| Visit    | store.mintel.com     |
| EMEA     | +44 (0) 20 7606 4533 |
| Brazil   | 0800 095 9094        |
| Americas | +1 (312) 943 5250    |
| China    | +86 (21) 6032 7300   |
| APAC     | +61 (0) 2 8284 8100  |

## Beauty & Personal Care Retailing - France - 2023

Report Price: £1095 | \$1495 | €1295

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



- **Digital lifestyles may impact demand**

Figure 19: France: Beauty/grooming routine behaviours, 2023

- **Sustainability issues are still important**

Figure 20: France: Sustainability behaviours in BPC, 2022

### PURCHASING OF BEAUTY AND PERSONAL CARE PRODUCTS

Figure 21: France: Products purchased in the last year, 2022

- **Women aged 16-34 biggest purchasers**

Figure 22: France: beauty and personal care products buyers by gender and age, 2022

### CHANNELS USED TO PURCHASE BPC PRODUCTS

- **Consumers shop mostly in-store for beauty and personal care products**

Figure 23: France: in-store and online buyers of beauty and personal care products, 2022

- **Delivery key to younger online beauty shoppers' purchasing decisions**

Figure 24: France: in-store and online buyers of beauty and personal care products, by age, 2022

### RETAILERS SHOPPED AT FOR BEAUTY AND PERSONAL CARE PRODUCTS

- **Grocery retailers the most popular destination for buying BPC**

Figure 25: France: Where they purchased beauty and personal care items in the last 12 months, 2022

- **Amazon popular among all consumers**

Figure 26: France: retailer used to purchase beauty and personal care products, by net monthly household income, 2022

### HOW CONSUMERS WOULD CUT BACK ON BPC PRODUCT SPENDING

- **Stockpiling, shopping around for the best prices and opting for lower-priced products**

Figure 27: France: beauty and personal care products buyers cost savings measures, 2022

Figure 28: France: beauty and personal care products buyers cost savings measures, 2022

### ATTITUDES TOWARDS INNOVATIONS IN BPC PRODUCTS AND RETAILING

- **Efforts to minimise packaging waste will win customer loyalty**

### What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

### Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

### Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 29: France: attitudes to innovations, returning packaging for reward, 2022

- **Convenience of one stop BPC destination makes supermarkets appeal**

Figure 30: France: attitudes to innovations, wider availability of premium brands, 2022

- **Pressure on premium brands to deliver greater value**

Figure 31: France: attitudes to innovations, value products equally effective, 2022

- **Overwhelmed by choice and looking for shortcuts**

Figure 32: France: attitudes to innovations, demos and reviews online are helpful, 2022

## COMPANIES AND BRANDS

- **An overview of the key players**
- **2022 sees post-pandemic rebound**
- **Digital technology is building omnichannel integration and the in-store experience**
- **Eco-credentials influence store designs**
- **Refillables**

Figure 33: France: Leading beauty specialists, sales, 2019-21

Figure 34: France: Leading beauty specialists, outlets, 2019-21

- **Pharmacies and parapharmacies**

## MARKET SHARES

Figure 35: France: Leading beauty specialists: shares of all beauty specialists' sales, 2019-21

- **Online shopping behaviours persist in BPC post-pandemic**
- **Sephora leads online as well as in-store**

Figure 36: France: search interest on Google, selected BPC retailers, 12 months, 2022- 23

## APPENDIX: DATA SOURCES, RESEARCH METHODOLOGY AND ABBREVIATIONS

- **Abbreviations**
- **Consumer research methodology**
- **Data sources**

## What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

## Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

## Buy this report now

Visit [store.mintel.com](https://store.mintel.com)

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



## About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.