

# Home Care in France

February 2024

Table of Contents

## Home Care in France

### EXECUTIVE SUMMARY

Home care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for home care?

### MARKET INDICATORS

Table 1 - Households 2018-2023

### MARKET DATA

Table 2 - Sales of Home Care by Category: Value 2018-2023

Table 3 - Sales of Home Care by Category: % Value Growth 2018-2023

Table 4 - NBO Company Shares of Home Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Home Care: % Value 2020-2023

Table 6 - Penetration of Private Label in Home Care by Category: % Value 2018-2023

Table 7 - Distribution of Home Care by Format: % Value 2018-2023

Table 8 - Distribution of Home Care by Format and Category: % Value 2023

Table 9 - Forecast Sales of Home Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Home Care by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Air Care in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Air care comes under pressure as consumers tighten their purse strings

Candle air fresheners the standout category

Multifunctional, natural and sustainable products continue to find an audience despite economic pressures

#### PROSPECTS AND OPPORTUNITIES

Slow recovery predicted for air care as the category continues to face several challenges

Candle air fresheners set to be the standout category

Retail landscape presents new opportunities for private label and smaller players

### CATEGORY DATA

Table 11 - Sales of Air Care by Category: Value 2018-2023

Table 12 - Sales of Air Care by Category: % Value Growth 2018-2023

Table 13 - Sales of Air Care by Fragrance: Value Ranking 2021-2023

Table 14 - NBO Company Shares of Air Care: % Value 2019-2023

Table 15 - LBN Brand Shares of Air Care: % Value 2020-2023

Table 16 - Forecast Sales of Air Care by Category: Value 2023-2028

Table 17 - Forecast Sales of Air Care by Category: % Value Growth 2023-2028

## Bleach in France

### KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Decline in value due to Multi-purpose cleaners but  
Health and sustainability concerns limiting demand for bleach  
La Croix continues to dominate but private label providing stiff competition

## PROSPECTS AND OPPORTUNITIES

Bleach sales expected to go down the drain due to negative image  
Competition from alternative surface care products set to pose a strong challenge to bleach sales  
Leading players are slowly phasing out bleach from their portfolios

## CATEGORY DATA

Table 18 - Sales of Bleach: Value 2018-2023  
Table 19 - Sales of Bleach: % Value Growth 2018-2023  
Table 20 - NBO Company Shares of Bleach: % Value 2019-2023  
Table 21 - LBN Brand Shares of Bleach: % Value 2020-2023  
Table 22 - Forecast Sales of Bleach: Value 2023-2028  
Table 23 - Forecast Sales of Bleach: % Value Growth 2023-2028

## Dishwashing in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Dishwashing sees mixed results  
Green and product innovation on the backfoot  
Refills gain momentum in 2023 but automatic dishwashing tablets the big winner

#### PROSPECTS AND OPPORTUNITIES

Automatic dishwashing tablets expected to remain a driving force of sales in an otherwise mature category  
Green brands set to make a comeback once inflation settles  
E-commerce still full of potential but supermarkets and hypermarkets likely to remain the main go-to channels

#### CATEGORY INDICATORS

Table 24 - Household Possession of Dishwashers 2017-2022

#### CATEGORY DATA

Table 25 - Sales of Dishwashing by Category: Value 2018-2023  
Table 26 - Sales of Dishwashing by Category: % Value Growth 2018-2023  
Table 27 - NBO Company Shares of Dishwashing: % Value 2019-2023  
Table 28 - LBN Brand Shares of Dishwashing: % Value 2020-2023  
Table 29 - Forecast Sales of Dishwashing by Category: Value 2023-2028  
Table 30 - Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

## Home Insecticides in France

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Hot weather, bed bugs and the EGAlim law influence sales in 2023  
Mixed performances seen across home insecticides  
Competitive landscape remains stable with SC Johnson dominating

#### PROSPECTS AND OPPORTUNITIES

Challenging outlook for home insecticides as health concerns rise  
Consumers expected to seek out more natural and sustainable solutions

Home-made remedies could present competition

#### CATEGORY DATA

Table 31 - Sales of Home Insecticides by Category: Value 2018-2023

Table 32 - Sales of Home Insecticides by Category: % Value Growth 2018-2023

Table 33 - Sales of Spray/Aerosol Insecticides by Type: % Value 2018-2023

Table 34 - NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 35 - LBN Brand Shares of Home Insecticides: % Value 2020-2023

Table 36 - Forecast Sales of Home Insecticides by Category: Value 2023-2028

Table 37 - Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

#### Laundry Care in France

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Financial pressures dictate market demand for laundry care in 2023

Non-essential products struggle as consumers rationalise their spending

Private label the big winner as price becomes a priority

#### PROSPECTS AND OPPORTUNITIES

Brighter prospects predicted for 2024 and beyond

Detergent tablets set to cannibalise sales of laundry aids

Opportunities remain for manufacturers and retailers despite the category's maturity

#### CATEGORY INDICATORS

Table 38 - Household Possession of Washing Machines 2018-2023

#### CATEGORY DATA

Table 39 - Sales of Laundry Care by Category: Value 2018-2023

Table 40 - Sales of Laundry Care by Category: % Value Growth 2018-2023

Table 41 - Sales of Laundry Aids by Category: Value 2018-2023

Table 42 - Sales of Laundry Aids by Category: % Value Growth 2018-2023

Table 43 - Sales of Laundry Detergents by Category: Value 2018-2023

Table 44 - Sales of Laundry Detergents by Category: % Value Growth 2018-2023

Table 45 - Sales of In-wash Spot and Stain Removers by Type: % Value Breakdown 2018-2023

Table 46 - NBO Company Shares of Laundry Care: % Value 2019-2023

Table 47 - LBN Brand Shares of Laundry Care: % Value 2020-2023

Table 48 - NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 49 - LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 50 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 51 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 52 - Forecast Sales of Laundry Care by Category: Value 2023-2028

Table 53 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

#### Polishes in France

#### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sales continue to spiral downwards as polishes lose their relevance in 2023

Shoe polish losing its shine despite the rise of sports footwear

Distribution landscape varies between the different products

#### PROSPECTS AND OPPORTUNITIES

Sales expected to continue falling as interest wanes  
Branded and multifunctional products expected to outperform private label basics  
Retailers expected to further reduce the shelf space provided for polishes

#### CATEGORY DATA

Table 54 - Sales of Polishes by Category: Value 2018-2023  
Table 55 - Sales of Polishes by Category: % Value Growth 2018-2023  
Table 56 - NBO Company Shares of Polishes: % Value 2019-2023  
Table 57 - LBN Brand Shares of Polishes: % Value 2020-2023  
Table 58 - Forecast Sales of Polishes by Category: Value 2023-2028  
Table 59 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

#### Surface Care in France

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Value growth sustained by price rises as demand drops due to economic pressures  
Trend towards more traditional products carried by inflationary pressures  
Financial pressures benefit sales of private label products in 2023

##### PROSPECTS AND OPPORTUNITIES

Brighter outlook predicted from 2024 with signs of improvement in the economy  
Back-to-basics trend set to continue developing as health concerns grow  
E commerce likely to present further growth opportunities

#### CATEGORY DATA

Table 60 - Sales of Surface Care by Category: Value 2018-2023  
Table 61 - Sales of Surface Care by Category: % Value Growth 2018-2023  
Table 62 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023  
Table 63 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023  
Table 64 - NBO Company Shares of Surface Care: % Value 2019-2023  
Table 65 - LBN Brand Shares of Surface Care: % Value 2020-2023  
Table 66 - NBO Company Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2019-2023  
Table 67 - LBN Brand Shares of Home Care Wipes and Floor Cleaning Systems: % Value 2020-2023  
Table 68 - Forecast Sales of Surface Care by Category: Value 2023-2028  
Table 69 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

#### Toilet Care in France

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Toilet care sees a return to growth with sales benefiting from the perceived essential nature of these products  
Environmental concerns put on hold as consumers are forced to look for the best value  
Leading brands see mixed results in 2023 as competition from private label grows

##### PROSPECTS AND OPPORTUNITIES

Sales set to grow in line with the increasing number of households in France  
Tablets format showing potential but more education may be need on the benefits  
Sustainability likely to have a growing influence on sales

#### CATEGORY DATA

Table 70 - Sales of Toilet Care by Category: Value 2018-2023

Table 71 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 72 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 73 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 74 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 75 - Forecast Sales of Toilet Care by Category: % Value Growth 2023-2028

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