



Consumer Health in France

October 2025

Table of Contents

Consumer Health in France

EXECUTIVE SUMMARY

Consumer Health in 2025: The big picture

Key trends in 2025

Competitive landscape

Channel developments

What next for Consumer Health?

MARKET INDICATORS

Table 1 - Consumer Expenditure on Health Goods and Medical Services: Value 2020-2025

Table 2 - Life Expectancy at Birth 2020-2025

MARKET DATA

Table 3 - Sales of Consumer Health by Category: Value 2020-2025

Table 4 - Sales of Consumer Health by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Consumer Health: % Value 2021-2025

Table 6 - LBN Brand Shares of Consumer Health: % Value 2022-2025

Table 7 - Penetration of Private Label in Consumer Health by Category: % Value 2020-2025

Table 8 - Distribution of Consumer Health by Format: % Value 2020-2025

Table 9 - Distribution of Consumer Health by Format and Category: % Value 2025

Table 10 - Forecast Sales of Consumer Health by Category: Value 2025-2030

Table 11 - Forecast Sales of Consumer Health by Category: % Value Growth 2025-2030

APPENDIX

OTC registration and classification

Vitamins and dietary supplements registration and classification

Self-medication/self-care and preventive medicine

Switches

Summary 1 - OTC: Switches 2024-2025

DISCLAIMER

DEFINITIONS

SOURCES

Summary 2 - Research Sources

Analgesics in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Analgesics continues to report healthy growth in 2025

Doliprane remains on top while ibuprofen brands suffer from negative media articles

Pharmacies and e-commerce monopolise distribution despite campaign to ease restrictions

PROSPECTS AND OPPORTUNITIES

Analgesics set for continued growth despite the challenges facing the market

Fears of shortages over as France looks to invest in local production

Herbal/traditional products could gain ground while the distribution landscape will remain under debate

CATEGORY DATA

Table 12 - Sales of Analgesics by Category: Value 2020-2025

Table 13 - Sales of Analgesics by Category: % Value Growth 2020-2025

Table 14 - NBO Company Shares of Analgesics: % Value 2021-2025

Table 15 - LBN Brand Shares of Analgesics: % Value 2022-2025

Table 16 - Forecast Sales of Analgesics by Category: Value 2025-2030

Table 17 - Forecast Sales of Analgesics by Category: % Value Growth 2025-2030

Sleep Aids in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising levels of stress and anxiety fuelling demand for sleep aids in 2025

Competition increases as more players invest in the market

Pharmacies dominate sales but new channels are making inroads

PROSPECTS AND OPPORTUNITIES

Sleep aids still has plenty of room for growth despite new threats

More combination products expected to be seen in the market

Concerns around the addictive nature of Rx sleeping pills could benefit OTC sales

CATEGORY DATA

Table 18 - Sales of Sleep Aids: Value 2020-2025

Table 19 - Sales of Sleep Aids: % Value Growth 2020-2025

Table 20 - NBO Company Shares of Sleep Aids: % Value 2021-2025

Table 21 - LBN Brand Shares of Sleep Aids: % Value 2022-2025

Table 22 - Forecast Sales of Sleep Aids: Value 2025-2030

Table 23 - Forecast Sales of Sleep Aids: % Value Growth 2025-2030

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

KEY DATA FINDINGS

2025 DEVELOPMENTS

Reverse switch of pseudoephedrine negatively impacts sales

Ricola remains a popular option thanks to ongoing new product development

Pharmacies dominate sales but opportunities exist for other channels

PROSPECTS AND OPPORTUNITIES

Ban on pseudoephedrine set to continue influencing the market

Digital and technological category advancements

Health and wellness and sustainability trends likely to push sales of herbal/traditional products

CATEGORY DATA

Table 24 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2020-2025

Table 25 - Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2020-2025

Table 26 - NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2021-2025

Table 27 - LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2022-2025

Table 28 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2025-2030

Table 29 - Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2025-2030

Dermatologicals in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Dermatologicals sees more positive results in 2025 as health awareness increases

Johnson & Johnson Santé Beauté France Bayer Sante Familiale lead
A less restrictive legal context enables other channels to take share from pharmacies

PROSPECTS AND OPPORTUNITIES

Dermatologicals still offers growth potential but challenges remain
Products advancements and innovations should help drive growth
Health and wellness trend expected to have a mixed impact on the market

CATEGORY DATA

Table 30 - Sales of Dermatologicals by Category: Value 2020-2025
Table 31 - Sales of Dermatologicals by Category: % Value Growth 2020-2025
Table 32 - NBO Company Shares of Dermatologicals: % Value 2021-2025
Table 33 - LBN Brand Shares of Dermatologicals: % Value 2022-2025
Table 34 - LBN Brand Shares of Hair Loss Treatments: % Value 2022-2025
Table 35 - Forecast Sales of Dermatologicals by Category: Value 2025-2030
Table 36 - Forecast Sales of Dermatologicals by Category: % Value Growth 2025-2030

Digestive Remedies in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Antacids and laxatives key growth drivers for digestive remedies in 2025
Reckitt Benckiser retains the lead with its popular Gaviscon brand
Pharmacies retain a near monopoly in digestive remedies

PROSPECTS AND OPPORTUNITIES

The outlook remains positive despite some threats to growth
No real digital and technological category advancements but instead new threats
Another threat: the competition from natural alternatives and healthier diets

CATEGORY DATA

Table 37 - Sales of Digestive Remedies by Category: Value 2020-2025
Table 38 - Sales of Digestive Remedies by Category: % Value Growth 2020-2025
Table 39 - NBO Company Shares of Digestive Remedies: % Value 2021-2025
Table 40 - LBN Brand Shares of Digestive Remedies: % Value 2022-2025
Table 41 - Forecast Sales of Digestive Remedies by Category: Value 2025-2030
Table 42 - Forecast Sales of Digestive Remedies by Category: % Value Growth 2025-2030

Eye Care in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Eye care sales rising due to demographic, social and environmental factors
Laboratoires Chauvin leads an increasingly consolidated market
Pharmacies remains the dominant distribution channel despite e-commerce gaining share

PROSPECTS AND OPPORTUNITIES

Rising pollen levels and increasing screen time are set to remain key growth drivers
New innovations offer new sales potential
Natural and preservative-free products offer strong growth potential

CATEGORY DATA

Table 43 - Sales of Eye Care by Category: Value 2020-2025

- Table 44 - Sales of Eye Care by Category: % Value Growth 2020-2025
- Table 45 - NBO Company Shares of Eye Care: % Value 2021-2025
- Table 46 - LBN Brand Shares of Eye Care: % Value 2022-2025
- Table 47 - Forecast Sales of Eye Care by Category: Value 2025-2030
- Table 48 - Forecast Sales of Eye Care by Category: % Value Growth 2025-2030

NRT Smoking Cessation Aids in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Sales of NRT smoking cessations aids increase as more smokers look to quit
- Competition remains focused around three companies
- Pharmacies retain control over sales of NRT smoking cessation aids

PROSPECTS AND OPPORTUNITIES

- Bleak outlook for the category despite increasing efforts to curb smoking prevalence
- Digital and technological solutions could help players reach a younger audience
- Natural alternatives unlikely to make inroads

CATEGORY INDICATORS

- Table 49 - Number of Smokers by Gender 2020-2025

CATEGORY DATA

- Table 50 - Sales of NRT Smoking Cessation Aids by Category: Value 2020-2025
- Table 51 - Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2020-2025
- Table 52 - NBO Company Shares of NRT Smoking Cessation Aids: % Value 2021-2025
- Table 53 - LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2022-2025
- Table 54 - Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2025-2030
- Table 55 - Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2025-2030

Wound Care in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

- Wound care sales stabilise as consumers return to more active lifestyles
- URGO retains the lead thanks to ongoing market investment
- Pharmacies remain relevant but continue to lose ground to grocery retailers and e-commerce

PROSPECTS AND OPPORTUNITIES

- Brighter outlook for wound care backed by more active lifestyles and an uptick in tourism
- Players expected to invest in launching more advanced products
- Legislative development could provide a boost to OTC sales

CATEGORY DATA

- Table 56 - Sales of Wound Care by Category: Value 2020-2025
- Table 57 - Sales of Wound Care by Category: % Value Growth 2020-2025
- Table 58 - NBO Company Shares of Wound Care: % Value 2021-2025
- Table 59 - LBN Brand Shares of Wound Care: % Value 2022-2025
- Table 60 - Forecast Sales of Wound Care by Category: Value 2025-2030
- Table 61 - Forecast Sales of Wound Care by Category: % Value Growth 2025-2030

Sports Nutrition in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sports nutrition remains in demand in France as consumers become more active
Competition heats up as new and existing players expand their offer
E-commerce now dominates sales of sports nutrition

PROSPECTS AND OPPORTUNITIES

Innovation and new product development offers strong growth potential
Digitalisation and social media set to have a big influence on the market
Health and wellness trend likely to inform new product developments

CATEGORY DATA

Table 62 - Sales of Sports Nutrition by Category: Value 2020-2025
Table 63 - Sales of Sports Nutrition by Category: % Value Growth 2020-2025
Table 64 - NBO Company Shares of Sports Nutrition: % Value 2021-2025
Table 65 - LBN Brand Shares of Sports Nutrition: % Value 2022-2025
Table 66 - Forecast Sales of Sports Nutrition by Category: Value 2025-2030
Table 67 - Forecast Sales of Sports Nutrition by Category: % Value Growth 2025-2030

Dietary Supplements in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Local production and new formats add fuel to the growth of dietary supplements
Arkopharma leads an increasingly fragmented market
Pharmacies dominate the market but e-commerce sees the biggest gains in 2025

PROSPECTS AND OPPORTUNITIES

Preventive health trend should propel growth in dietary supplements
Digitalisation, personalisation and the growing role of social media
Stricter legislation and a growing focus on sustainability

CATEGORY DATA

Table 68 - Sales of Dietary Supplements by Category: Value 2020-2025
Table 69 - Sales of Dietary Supplements by Category: % Value Growth 2020-2025
Table 70 - Sales of Dietary Supplements by Positioning: % Value 2020-2025
Table 71 - NBO Company Shares of Dietary Supplements: % Value 2021-2025
Table 72 - LBN Brand Shares of Dietary Supplements: % Value 2022-2025
Table 73 - Forecast Sales of Dietary Supplements by Category: Value 2025-2030
Table 74 - Forecast Sales of Dietary Supplements by Category: % Value Growth 2025-2030

Vitamins in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health meets pragmatism on French market
Competition intensifies against a backdrop of economic uncertainty
Pharmacies dominate sales but e-commerce is gaining ground

PROSPECTS AND OPPORTUNITIES

A Growing Demand Among Health-Conscious French Consumers
Digitalisation and personalisation

Strict legislation, clean labels and concerns over vitamin D deficiencies

CATEGORY DATA

Table 75 - Sales of Vitamins by Category: Value 2020-2025

Table 76 - Sales of Vitamins by Category: % Value Growth 2020-2025

Table 77 - Sales of Multivitamins by Positioning: % Value 2020-2025

Table 78 - NBO Company Shares of Vitamins: % Value 2021-2025

Table 79 - LBN Brand Shares of Vitamins: % Value 2022-2025

Table 80 - Forecast Sales of Vitamins by Category: Value 2025-2030

Table 81 - Forecast Sales of Vitamins by Category: % Value Growth 2025-2030

Weight Management and Wellbeing in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth limited by rising consumer scepticism toward OTC weight loss products

EA Pharma secures its lead but Ozempic presents a sizeable threat to the market

Health and beauty specialists remain key to distribution

PROSPECTS AND OPPORTUNITIES

Sales set to grow but players may need to look for new ways to attract consumers

GLP-1s, gummies and the growing influence of the digital market

Regulations could shift in line with EU proposals

CATEGORY DATA

Table 82 - Sales of Weight Management and Wellbeing by Category: Value 2020-2025

Table 83 - Sales of Weight Management and Wellbeing by Category: % Value Growth 2020-2025

Table 84 - NBO Company Shares of Weight Management and Wellbeing: % Value 2021-2025

Table 85 - LBN Brand Shares of Weight Management and Wellbeing: % Value 2022-2025

Table 86 - Forecast Sales of Weight Management and Wellbeing by Category: Value 2025-2030

Table 87 - Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2025-2030

Herbal/Traditional Products in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Herbal/traditional products increase in popularity thanks to the focus on clean living

Arkopharma and Solinest remain the standout players in a fragmented market

Pharmacies remains the go to channel despite its share declining

PROSPECTS AND OPPORTUNITIES

The shift toward prevention and healthy ageing should boost sales

Evidence-based functionality could be key to success in herbal/traditional products

Regulatory stability should benefit sales of herbal/traditional products

CATEGORY DATA

Table 88 - Sales of Herbal/Traditional Products by Category: Value 2020-2025

Table 89 - Sales of Herbal/Traditional Products by Category: % Value Growth 2020-2025

Table 90 - NBO Company Shares of Herbal/Traditional Products: % Value 2021-2025

Table 91 - LBN Brand Shares of Herbal/Traditional Products: % Value 2022-2025

Table 92 - Forecast Sales of Herbal/Traditional Products by Category: Value 2025-2030

Table 93 - Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2025-2030

KEY DATA FINDINGS

2025 DEVELOPMENTS

Stronger cold and flu season helps boost sales of paediatric consumer health in 2025

Bayer retains the lead despite its focus shifting to its dermocosmetics portfolio

Pharmacies still dominate sales despite e-commerce gaining traction

PROSPECTS AND OPPORTUNITIES

Growth likely to be constrained by France's falling birth rate

Evolving health concerns should fuel demand for vitamins and dietary supplements

Low demand could result in manufacturers focusing their investments elsewhere

CATEGORY DATA

Table 94 - Sales of Paediatric Consumer Health by Category: Value 2020-2025

Table 95 - Sales of Paediatric Consumer Health by Category: % Value Growth 2020-2025

Table 96 - NBO Company Shares of Paediatric Consumer Health: % Value 2021-2025

Table 97 - LBN Brand Shares of Paediatric Consumer Health: % Value 2022-2025

Table 98 - Forecast Sales of Paediatric Consumer Health by Category: Value 2025-2030

Table 99 - Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2025-2030

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.