

Consumer Appliances in France

December 2023

Table of Contents

Consumer Appliances in France

EXECUTIVE SUMMARY

Consumer appliances in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for consumer appliances?

MARKET INDICATORS

Table 1 - Household Penetration of Selected Total Stock Consumer Appliances by Category 2018-2024

Table 2 - Replacement Cycles of Consumer Appliances by Category 2018-2024

MARKET DATA

Table 3 - Sales of Consumer Appliances by Category: Volume 2018-2023

Table 4 - Sales of Consumer Appliances by Category: Value 2018-2023

Table 5 - Sales of Consumer Appliances by Category: % Volume Growth 2018-2023

Table 6 - Sales of Consumer Appliances by Category: % Value Growth 2018-2023

Table 7 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2018-2023

Table 8 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2018-2023

Table 9 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2018-2023

Table 10 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2018-2023

Table 11 - Sales of Small Appliances by Category: Volume 2018-2023

Table 12 - Sales of Small Appliances by Category: Value 2018-2023

Table 13 - Sales of Small Appliances by Category: % Volume Growth 2018-2023

Table 14 - Sales of Small Appliances by Category: % Value Growth 2018-2023

Table 15 - NBO Company Shares of Major Appliances: % Volume 2019-2023

Table 16 - LBN Brand Shares of Major Appliances: % Volume 2020-2023

Table 17 - NBO Company Shares of Small Appliances: % Volume 2019-2023

Table 18 - LBN Brand Shares of Small Appliances: % Volume 2020-2023

Table 19 - Distribution of Major Appliances by Format: % Volume 2018-2023

Table 20 - Distribution of Small Appliances by Format: % Volume 2018-2023

Table 21 - Forecast Sales of Consumer Appliances by Category: Volume 2023-2028

Table 22 - Forecast Sales of Consumer Appliances by Category: Value 2023-2028

Table 23 - Forecast Sales of Consumer Appliances by Category: % Volume Growth 2023-2028

Table 24 - Forecast Sales of Consumer Appliances by Category: % Value Growth 2023-2028

Table 25 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2023-2028

Table 26 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2023-2028

Table 27 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2023-2028

Table 28 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2023-2028

Table 29 - Forecast Sales of Small Appliances by Category: Volume 2023-2028

Table 30 - Forecast Sales of Small Appliances by Category: Value 2023-2028

Table 31 - Forecast Sales of Small Appliances by Category: % Volume Growth 2023-2028

Table 32 - Forecast Sales of Small Appliances by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Dishwashers in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales of dishwashers decline in 2023
Built-in models gaining share in dishwashers
Economic trends shape consumers' decisions

PROSPECTS AND OPPORTUNITIES

Limited opportunities for expansion in dishwashers in France
Retailers facing new consumptions trends
“Phygital” trends and omnichannel strategies seen across various appliances categories

CATEGORY DATA

Table 33 - Sales of Dishwashers by Category: Volume 2018-2023
Table 34 - Sales of Dishwashers by Category: Value 2018-2023
Table 35 - Sales of Dishwashers by Category: % Volume Growth 2018-2023
Table 36 - Sales of Dishwashers by Category: % Value Growth 2018-2023
Table 37 - Sales of Dishwashers by Format: % Volume 2018-2023
Table 38 - Sales of Dishwashers by Smart Appliances: % Volume 2019-2023
Table 39 - NBO Company Shares of Dishwashers: % Volume 2019-2023
Table 40 - LBN Brand Shares of Dishwashers: % Volume 2020-2023
Table 41 - Distribution of Dishwashers by Format: % Volume 2018-2023
Table 42 - Production of Dishwashers: Total Volume 2018-2023
Table 43 - Forecast Sales of Dishwashers by Category: Volume 2023-2028
Table 44 - Forecast Sales of Dishwashers by Category: Value 2023-2028
Table 45 - Forecast Sales of Dishwashers by Category: % Volume Growth 2023-2028
Table 46 - Forecast Sales of Dishwashers by Category: % Value Growth 2023-2028

Home Laundry Appliances in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Another year of difficulties
Brands utilise variety of competitive strategies
Innovations drive sales in a mature market

PROSPECTS AND OPPORTUNITIES

Volume sales set to pick up once economic conditions recover
Value sales set to increase through product innovations
Further demand for compact models due to urbanisation

CATEGORY DATA

Table 47 - Sales of Home Laundry Appliances by Category: Volume 2018-2023
Table 48 - Sales of Home Laundry Appliances by Category: Value 2018-2023
Table 49 - Sales of Home Laundry Appliances by Category: % Volume Growth 2018-2023
Table 50 - Sales of Home Laundry Appliances by Category: % Value Growth 2018-2023
Table 51 - Sales of Automatic Washer Dryers by Smart Appliances: % Volume 2018-2023
Table 52 - Sales of Automatic Washing Machines by Format: % Volume 2018-2023
Table 53 - Sales of Automatic Washing Machines by Volume Capacity: % Volume 2018-2023
Table 54 - Sales of Automatic Washing Machines by Smart Appliances: % Volume 2019-2023
Table 55 - NBO Company Shares of Home Laundry Appliances: % Volume 2019-2023
Table 56 - LBN Brand Shares of Home Laundry Appliances: % Volume 2020-2023
Table 57 - Distribution of Home Laundry Appliances by Format: % Volume 2018-2023
Table 58 - Production of Home Laundry Appliances: Total Volume 2018-2023

Table 59 - Forecast Sales of Home Laundry Appliances by Category: Volume 2023-2028

Table 60 - Forecast Sales of Home Laundry Appliances by Category: Value 2023-2028

Table 61 - Forecast Sales of Home Laundry Appliances by Category: % Volume Growth 2023-2028

Table 62 - Forecast Sales of Home Laundry Appliances by Category: % Value Growth 2023-2028

Large Cooking Appliances in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales slump continues

Retail channels consolidate their positions

Innovation and premiumisation in large cooking appliances

PROSPECTS AND OPPORTUNITIES

Opportunities for expansion in the forecast period

Products that could positively surprise over the forecast period

Retail channels shaped by different strategies

CATEGORY DATA

Table 63 - Sales of Large Cooking Appliances by Category: Volume 2018-2023

Table 64 - Sales of Large Cooking Appliances by Category: Value 2018-2023

Table 65 - Sales of Large Cooking Appliances by Category: % Volume Growth 2018-2023

Table 66 - Sales of Large Cooking Appliances by Category: % Value Growth 2018-2023

Table 67 - Sales of Built-in Hobs by Format: % Volume 2018-2023

Table 68 - Sales of Ovens by Smart Appliances: % Volume 2019-2023

Table 69 - NBO Company Shares of Large Cooking Appliances: % Volume 2019-2023

Table 70 - LBN Brand Shares of Large Cooking Appliances: % Volume 2020-2023

Table 71 - NBO Company Shares of Built-in Hobs: % Volume 2019-2023

Table 72 - NBO Company Shares of Ovens: % Volume 2019-2023

Table 73 - NBO Company Shares of Cooker Hoods: % Volume 2019-2023

Table 74 - NBO Company Shares of Built-in Cooker Hoods: % Volume 2019-2023

Table 75 - NBO Company Shares of Freestanding Cooker Hoods: % Volume 2019-2023

Table 76 - NBO Company Shares of Cookers: % Volume 2019-2023

Table 77 - Distribution of Large Cooking Appliances by Format: % Volume 2018-2023

Table 78 - Production of Large Cooking Appliances: Total Volume 2018-2023

Table 79 - Forecast Sales of Large Cooking Appliances by Category: Volume 2023-2028

Table 80 - Forecast Sales of Large Cooking Appliances by Category: Value 2023-2028

Table 81 - Forecast Sales of Large Cooking Appliances by Category: % Volume Growth 2023-2028

Table 82 - Forecast Sales of Large Cooking Appliances by Category: % Value Growth 2023-2028

Microwaves in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Decline in sales against background of intense competition and limited innovation

Sales fall before anticipated recovery

Retailing channels continue to develop the microwave market

PROSPECTS AND OPPORTUNITIES

High penetration rate suggests limited opportunities for volume growth

Built-in models set to cannibalise freestanding ones

Repairability index extends to microwaves, as ADEME promotes correct usage and maintenance to extend lifespan of products

CATEGORY DATA

- Table 83 - Sales of Microwaves by Category: Volume 2018-2023
- Table 84 - Sales of Microwaves by Category: Value 2018-2023
- Table 85 - Sales of Microwaves by Category: % Volume Growth 2018-2023
- Table 86 - Sales of Microwaves by Category: % Value Growth 2018-2023
- Table 87 - Sales of Microwaves by Smart Appliances: % Volume 2019-2023
- Table 88 - NBO Company Shares of Microwaves: % Volume 2019-2023
- Table 89 - LBN Brand Shares of Microwaves: % Volume 2020-2023
- Table 90 - Distribution of Microwaves by Format: % Volume 2018-2023
- Table 91 - Production of Microwaves: Total Volume 2018-2023
- Table 92 - Forecast Sales of Microwaves by Category: Volume 2023-2028
- Table 93 - Forecast Sales of Microwaves by Category: Value 2023-2028
- Table 94 - Forecast Sales of Microwaves by Category: % Volume Growth 2023-2028
- Table 95 - Forecast Sales of Microwaves by Category: % Value Growth 2023-2028

Refrigeration Appliances in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Essential character of fridge freezers and fridges shows in sales
- Freezers and wine coolers decline due to the economic conditions
- Innovations driving premiumisation

PROSPECTS AND OPPORTUNITIES

- Strong reliance on renewal
- Electric wine coolers still has some potential in built-in projects
- Omnichannel strategies on the rise

CATEGORY DATA

- Table 96 - Sales of Refrigeration Appliances by Category: Volume 2018-2023
- Table 97 - Sales of Refrigeration Appliances by Category: Value 2018-2023
- Table 98 - Sales of Refrigeration Appliances by Category: % Volume Growth 2018-2023
- Table 99 - Sales of Refrigeration Appliances by Category: % Value Growth 2018-2023
- Table 100 - Sales of Freezers by Format: % Volume 2018-2023
- Table 101 - Sales of Freezers by Volume Capacity: % Volume 2018-2023
- Table 102 - Sales of Fridge Freezers by Format: % Volume 2018-2023
- Table 103 - Sales of Fridge Freezers by Volume Capacity: % Volume 2018-2023
- Table 104 - Sales of Fridge Freezers by Smart Appliances: % Volume 2019-2023
- Table 105 - Sales of Fridges by Volume Capacity: % Volume 2018-2023
- Table 106 - NBO Company Shares of Refrigeration Appliances: % Volume 2019-2023
- Table 107 - LBN Brand Shares of Refrigeration Appliances: % Volume 2020-2023
- Table 108 - NBO Company Shares of Built-in Fridge Freezers: % Volume 2019-2023
- Table 109 - NBO Company Shares of Freestanding Fridge Freezers: % Volume 2019-2023
- Table 110 - NBO Company Shares of Built-in Fridges: % Volume 2019-2023
- Table 111 - NBO Company Shares of Freestanding Fridges: % Volume 2019-2023
- Table 112 - Distribution of Refrigeration Appliances by Format: % Volume 2018-2023
- Table 113 - Production of Refrigeration Appliances: Total Volume 2018-2023
- Table 114 - Forecast Sales of Refrigeration Appliances by Category: Volume 2023-2028
- Table 115 - Forecast Sales of Refrigeration Appliances by Category: Value 2023-2028
- Table 116 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2023-2028
- Table 117 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2023-2028

Air Treatment Products in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

The category benefits from the weather and other factors
Air conditioners category benefits from hot summers and improved insulation
Retailing landscape grasping the growing trend

PROSPECTS AND OPPORTUNITIES

Further development of online sales expected
Cooling driven by air conditioners
Demand for air treatment products to address pollution issues

CATEGORY DATA

Table 118 - Sales of Air Treatment Products by Category: Volume 2018-2023
Table 119 - Sales of Air Treatment Products by Category: Value 2018-2023
Table 120 - Sales of Air Treatment Products by Category: % Volume Growth 2018-2023
Table 121 - Sales of Air Treatment Products by Category: % Value Growth 2018-2023
Table 122 - Sales of Air Conditioners by Smart Appliances: % Volume 2019-2023
Table 123 - NBO Company Shares of Air Treatment Products: % Volume 2019-2023
Table 124 - LBN Brand Shares of Air Treatment Products: % Volume 2020-2023
Table 125 - Distribution of Air Treatment Products by Format: % Volume 2018-2023
Table 126 - Production of Air Conditioners: Total Volume 2018-2023
Table 127 - Forecast Sales of Air Treatment Products by Category: Volume 2023-2028
Table 128 - Forecast Sales of Air Treatment Products by Category: Value 2023-2028
Table 129 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2023-2028
Table 130 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2023-2028

Food Preparation Appliances in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Food processors suffer
Essential appliances such as mixers remain OK
Ongoing culinary trends and at-home lifestyles will support demand overall

PROSPECTS AND OPPORTUNITIES

Food processors to make a comeback, with a trend to fewer appliances at home privileging multi-functional devices
Health and wellness set to exert a strong influence
Private labels and marketplaces to play increasingly important role

CATEGORY DATA

Table 131 - Sales of Food Preparation Appliances by Category: Volume 2018-2023
Table 132 - Sales of Food Preparation Appliances by Category: Value 2018-2023
Table 133 - Sales of Food Preparation Appliances by Category: % Volume Growth 2018-2023
Table 134 - Sales of Food Preparation Appliances by Category: % Value Growth 2018-2023
Table 135 - NBO Company Shares of Food Preparation Appliances: % Volume 2019-2023
Table 136 - LBN Brand Shares of Food Preparation Appliances: % Volume 2020-2023
Table 137 - Distribution of Food Preparation Appliances by Format: % Volume 2018-2023
Table 138 - Forecast Sales of Food Preparation Appliances by Category: Volume 2023-2028
Table 139 - Forecast Sales of Food Preparation Appliances by Category: Value 2023-2028
Table 140 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2023-2028

Table 141 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2023-2028

Personal Care Appliances in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Resilience in personal care appliances, except for facial cleansers

Hair styling driving up value

Strong competition between channels in value appliances

PROSPECTS AND OPPORTUNITIES

Rising health awareness set to drive growth in oral care appliances

Body shavers with lower growth potential, but hair styling still offers opportunities

Retail e-commerce set to continue growing

CATEGORY DATA

Table 142 - Sales of Personal Care Appliances by Category: Volume 2018-2023

Table 143 - Sales of Personal Care Appliances by Category: Value 2018-2023

Table 144 - Sales of Personal Care Appliances by Category: % Volume Growth 2018-2023

Table 145 - Sales of Personal Care Appliances by Category: % Value Growth 2018-2023

Table 146 - Sales of Body Shavers by Format: % Volume 2018-2023

Table 147 - Sales of Hair Care Appliances by Format: % Volume 2018-2023

Table 148 - NBO Company Shares of Personal Care Appliances 2019-2023

Table 149 - LBN Brand Shares of Personal Care Appliances 2020-2023

Table 150 - Distribution of Personal Care Appliances by Format: % Volume 2018-2023

Table 151 - Forecast Sales of Personal Care Appliances by Category: Volume 2023-2028

Table 152 - Forecast Sales of Personal Care Appliances by Category: Value 2023-2028

Table 153 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2023-2028

Table 154 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2023-2028

Small Cooking Appliances in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Coffee a great bet for the future, air fryers continues to grow

Other appliances suffering from the economic conditions

Brands and retailers fight for market share in tight spaces

PROSPECTS AND OPPORTUNITIES

Coffee to continue growing

Healthy cooking appliances

Sustainability concerns inform purchasing decisions of younger consumers

CATEGORY DATA

Table 155 - Sales of Small Cooking Appliances by Category: Volume 2018-2023

Table 156 - Sales of Small Cooking Appliances by Category: Value 2018-2023

Table 157 - Sales of Small Cooking Appliances by Category: % Volume Growth 2018-2023

Table 158 - Sales of Small Cooking Appliances by Category: % Value Growth 2018-2023

Table 159 - Sales of Freestanding Hobs by Format: % Volume 2018-2023

Table 160 - NBO Company Shares of Small Cooking Appliances: % Volume 2019-2023

Table 161 - LBN Brand Shares of Small Cooking Appliances: % Volume 2020-2023

Table 162 - Distribution of Small Cooking Appliances by Format: % Volume 2018-2023

Table 163 - Forecast Sales of Small Cooking Appliances by Category: Volume 2023-2028

Table 164 - Forecast Sales of Small Cooking Appliances by Category: Value 2023-2028

Table 165 - Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2023-2028

Table 166 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2023-2028

Vacuum Cleaners in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Traditional models see decline after strong sales during the pandemic

Robots, sticks and wet and dry models see growth

SEB Groupe is the largest company, while Dyson is the leading brand

PROSPECTS AND OPPORTUNITIES

Further growth for robotic vacuum cleaners, stick models and wet and dry options

Premiumisation trend

Appliances and electronics specialists and e-commerce to be important channels

CATEGORY DATA

Table 167 - Sales of Vacuum Cleaners by Category: Volume 2018-2023

Table 168 - Sales of Vacuum Cleaners by Category: Value 2018-2023

Table 169 - Sales of Vacuum Cleaners by Category: % Volume Growth 2018-2023

Table 170 - Sales of Vacuum Cleaners by Category: % Value Growth 2018-2023

Table 171 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2019-2023

Table 172 - NBO Company Shares of Vacuum Cleaners: % Volume 2019-2023

Table 173 - LBN Brand Shares of Vacuum Cleaners: % Volume 2020-2023

Table 174 - Distribution of Vacuum Cleaners by Format: % Volume 2018-2023

Table 175 - Forecast Sales of Vacuum Cleaners by Category: Volume 2023-2028

Table 176 - Forecast Sales of Vacuum Cleaners by Category: Value 2023-2028

Table 177 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2023-2028

Table 178 - Forecast Sales of Vacuum Cleaners 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/consumer-appliances-in-france/report.