



**Euromonitor  
International**

# Consumer Appliances in France

November 2024

Table of Contents

EXECUTIVE SUMMARY

Consumer appliances in 2024: The big picture  
2024 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 2019-2025  
Table 2 - Replacement Cycles of Consumer Appliances by Category 2019-2025

MARKET DATA

Table 3 - Sales of Consumer Appliances by Category: Volume 2019-2024  
Table 4 - Sales of Consumer Appliances by Category: Value 2019-2024  
Table 5 - Sales of Consumer Appliances by Category: % Volume Growth 2019-2024  
Table 6 - Sales of Consumer Appliances by Category: % Value Growth 2019-2024  
Table 7 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2019-2024  
Table 8 - Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2019-2024  
Table 9 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2019-2024  
Table 10 - Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2019-2024  
Table 11 - Sales of Small Appliances by Category: Volume 2019-2024  
Table 12 - Sales of Small Appliances by Category: Value 2019-2024  
Table 13 - Sales of Small Appliances by Category: % Volume Growth 2019-2024  
Table 14 - Sales of Small Appliances by Category: % Value Growth 2019-2024  
Table 15 - NBO Company Shares of Major Appliances: % Volume 2020-2024  
Table 16 - LBN Brand Shares of Major Appliances: % Volume 2021-2024  
Table 17 - NBO Company Shares of Small Appliances: % Volume 2020-2024  
Table 18 - LBN Brand Shares of Small Appliances: % Volume 2021-2024  
Table 19 - Distribution of Major Appliances by Format: % Volume 2019-2024  
Table 20 - Distribution of Small Appliances by Format: % Volume 2019-2024  
Table 21 - Forecast Sales of Consumer Appliances by Category: Volume 2024-2029  
Table 22 - Forecast Sales of Consumer Appliances by Category: Value 2024-2029  
Table 23 - Forecast Sales of Consumer Appliances by Category: % Volume Growth 2024-2029  
Table 24 - Forecast Sales of Consumer Appliances by Category: % Value Growth 2024-2029  
Table 25 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Volume 2024-2029  
Table 26 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: Value 2024-2029  
Table 27 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Volume Growth 2024-2029  
Table 28 - Forecast Sales of Major Appliances by Category and Built-in/Freestanding Split: % Value Growth 2024-2029  
Table 29 - Forecast Sales of Small Appliances by Category: Volume 2024-2029  
Table 30 - Forecast Sales of Small Appliances by Category: Value 2024-2029  
Table 31 - Forecast Sales of Small Appliances by Category: % Volume Growth 2024-2029  
Table 32 - Forecast Sales of Small Appliances by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Sales of dishwashers decline in 2024 as real estate market stalls

Consumers look for energy efficient and durable dishwashers

Appliances and electronics specialists and e-commerce the big winners in 2024 as consumers go in search of value

## PROSPECTS AND OPPORTUNITIES

Brighter outlook for dishwashers with an anticipated improvement in the housing market

BSH France expected to remain on top

Smart solutions and energy efficiency likely to be a focus of new product development while second-hand market could present competition

## CATEGORY DATA

Table 33 - Sales of Dishwashers by Category: Volume 2019-2024

Table 34 - Sales of Dishwashers by Category: Value 2019-2024

Table 35 - Sales of Dishwashers by Category: % Volume Growth 2019-2024

Table 36 - Sales of Dishwashers by Category: % Value Growth 2019-2024

Table 37 - Sales of Dishwashers by Format: % Volume 2019-2024

Table 38 - Sales of Dishwashers by Smart Appliances: % Volume 2020-2024

Table 39 - NBO Company Shares of Dishwashers: % Volume 2020-2024

Table 40 - LBN Brand Shares of Dishwashers: % Volume 2021-2024

Table 41 - Distribution of Dishwashers by Format: % Volume 2019-2024

Table 42 - Production of Dishwashers: Total Volume 2019-2024

Table 43 - Forecast Sales of Dishwashers by Category: Volume 2024-2029

Table 44 - Forecast Sales of Dishwashers by Category: Value 2024-2029

Table 45 - Forecast Sales of Dishwashers by Category: % Volume Growth 2024-2029

Table 46 - Forecast Sales of Dishwashers by Category: % Value Growth 2024-2029

## Home Laundry Appliances in France

## KEY DATA FINDINGS

## 2024 DEVELOPMENTS

Home laundry appliances sees a more stable performance as price discounting boosts volume sales

Sales of automatic dryers benefit from the poor weather in 2024

Players focus on smart innovations, space saving options and energy efficiency to boost sales

## PROSPECTS AND OPPORTUNITIES

Home laundry appliances expected to face challenges and opportunities over the forecast period

Built-in home laundry appliances expected to receive more attention over the forecast period

Urbanisation expected to influence purchasing decisions

## CATEGORY DATA

Table 47 - Sales of Home Laundry Appliances by Category: Volume 2019-2024

Table 48 - Sales of Home Laundry Appliances by Category: Value 2019-2024

Table 49 - Sales of Home Laundry Appliances by Category: % Volume Growth 2019-2024

Table 50 - Sales of Home Laundry Appliances by Category: % Value Growth 2019-2024

Table 51 - Sales of Automatic Washer Dryers by Smart Appliances: % Volume 2019-2024

Table 52 - Sales of Automatic Washing Machines by Format: % Volume 2019-2024

Table 53 - Sales of Automatic Washing Machines by Volume Capacity: % Volume 2019-2024

Table 54 - Sales of Automatic Washing Machines by Smart Appliances: % Volume 2020-2024

Table 55 - NBO Company Shares of Home Laundry Appliances: % Volume 2020-2024

Table 56 - LBN Brand Shares of Home Laundry Appliances: % Volume 2021-2024

Table 57 - Distribution of Home Laundry Appliances by Format: % Volume 2019-2024

Table 58 - Production of Home Laundry Appliances: Total Volume 2019-2024

Table 59 - Forecast Sales of Home Laundry Appliances by Category: Volume 2024-2029

Table 60 - Forecast Sales of Home Laundry Appliances by Category: Value 2024-2029

Table 61 - Forecast Sales of Home Laundry Appliances by Category: % Volume Growth 2024-2029

Table 62 - Forecast Sales of Home Laundry Appliances by Category: % Value Growth 2024-2029

Large Cooking Appliances in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales slump in 2024 due to economic pressures and France's struggling housing market

Appliances and electronics specialists remain on top thanks to their wide offer and competitive prices

Premiumisation provides opportunities for value growth

PROSPECTS AND OPPORTUNITIES

Anticipated recovery in the housing market spells good news for large cooking appliances with the focus on built-in formats

Minimalist and smart options expected to draw interest while Made in France claims still offer potential

Home products specialists expected to see improved footfall as the housing market recovers

CATEGORY DATA

Table 63 - Sales of Large Cooking Appliances by Category: Volume 2019-2024

Table 64 - Sales of Large Cooking Appliances by Category: Value 2019-2024

Table 65 - Sales of Large Cooking Appliances by Category: % Volume Growth 2019-2024

Table 66 - Sales of Large Cooking Appliances by Category: % Value Growth 2019-2024

Table 67 - Sales of Built-in Hobs by Format: % Volume 2019-2024

Table 68 - Sales of Ovens by Smart Appliances: % Volume 2020-2024

Table 69 - NBO Company Shares of Large Cooking Appliances: % Volume 2020-2024

Table 70 - LBN Brand Shares of Large Cooking Appliances: % Volume 2021-2024

Table 71 - NBO Company Shares of Built-in Hobs: % Volume 2020-2024

Table 72 - NBO Company Shares of Ovens: % Volume 2020-2024

Table 73 - NBO Company Shares of Cooker Hoods: % Volume 2020-2024

Table 74 - NBO Company Shares of Built-in Cooker Hoods: % Volume 2020-2024

Table 75 - NBO Company Shares of Freestanding Cooker Hoods: % Volume 2020-2024

Table 76 - NBO Company Shares of Cookers: % Volume 2020-2024

Table 77 - NBO Company Shares of Range Cookers: % Volume 2020-2024

Table 78 - Distribution of Large Cooking Appliances by Format: % Volume 2019-2024

Table 79 - Production of Large Cooking Appliances: Total Volume 2019-2024

Table 80 - Forecast Sales of Large Cooking Appliances by Category: Volume 2024-2029

Table 81 - Forecast Sales of Large Cooking Appliances by Category: Value 2024-2029

Table 82 - Forecast Sales of Large Cooking Appliances by Category: % Volume Growth 2024-2029

Table 83 - Forecast Sales of Large Cooking Appliances by Category: % Value Growth 2024-2029

Microwaves in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales of microwaves decline in 2024 as the category suffers from signs of maturity and a deflated housing market

Microwaves still seen as a convenient appliance to keep in the home but a lack of innovation is limiting the category's progress

Appliances and electronics specialists and e-commerce the big winners in 2024 as consumers go in search of the best value options

PROSPECTS AND OPPORTUNITIES

Category maturity likely to remain an obstacle to growth

Built-in microwaves seen to have stronger growth potential but freestanding models will remain on top

Microwaves expected to face increasing competition from substitutes

## CATEGORY DATA

- Table 84 - Sales of Microwaves by Category: Volume 2019-2024
- Table 85 - Sales of Microwaves by Category: Value 2019-2024
- Table 86 - Sales of Microwaves by Category: % Volume Growth 2019-2024
- Table 87 - Sales of Microwaves by Category: % Value Growth 2019-2024
- Table 88 - Sales of Microwaves by Smart Appliances: % Volume 2020-2024
- Table 89 - NBO Company Shares of Microwaves: % Volume 2020-2024
- Table 90 - LBN Brand Shares of Microwaves: % Volume 2021-2024
- Table 91 - Distribution of Microwaves by Format: % Volume 2019-2024
- Table 92 - Production of Microwaves: Total Volume 2019-2024
- Table 93 - Forecast Sales of Microwaves by Category: Volume 2024-2029
- Table 94 - Forecast Sales of Microwaves by Category: Value 2024-2029
- Table 95 - Forecast Sales of Microwaves by Category: % Volume Growth 2024-2029
- Table 96 - Forecast Sales of Microwaves by Category: % Value Growth 2024-2029

## Refrigeration Appliances in France

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

- Economic pressures continue to inform the growth and development of refrigeration appliances in France in 2024
- Performances vary within refrigeration appliances as consumers focus on their essential needs
- Consumers have differing demands but space, energy efficiency and price remain key influences on demand

### PROSPECTS AND OPPORTUNITIES

- Forecasted sales fuelled by a coming recovery period
- Bright outlook for electric wine coolers/chillers
- Retailers adopting an omnichannel approach to meet the needs of consumers

## CATEGORY DATA

- Table 97 - Sales of Refrigeration Appliances by Category: Volume 2019-2024
- Table 98 - Sales of Refrigeration Appliances by Category: Value 2019-2024
- Table 99 - Sales of Refrigeration Appliances by Category: % Volume Growth 2019-2024
- Table 100 - Sales of Refrigeration Appliances by Category: % Value Growth 2019-2024
- Table 101 - Sales of Freezers by Format: % Volume 2019-2024
- Table 102 - Sales of Freezers by Volume Capacity: % Volume 2019-2024
- Table 103 - Sales of Fridge Freezers by Format: % Volume 2019-2024
- Table 104 - Sales of Fridge Freezers by Volume Capacity: % Volume 2019-2024
- Table 105 - Sales of Fridge Freezers by Smart Appliances: % Volume 2020-2024
- Table 106 - Sales of Fridges by Volume Capacity: % Volume 2019-2024
- Table 107 - NBO Company Shares of Refrigeration Appliances: % Volume 2020-2024
- Table 108 - LBN Brand Shares of Refrigeration Appliances: % Volume 2021-2024
- Table 109 - NBO Company Shares of Built-in Fridge Freezers: % Volume 2020-2024
- Table 110 - NBO Company Shares of Freestanding Fridge Freezers: % Volume 2020-2024
- Table 111 - NBO Company Shares of Built-in Fridges: % Volume 2020-2024
- Table 112 - NBO Company Shares of Freestanding Fridges: % Volume 2020-2024
- Table 113 - Distribution of Refrigeration Appliances by Format: % Volume 2019-2024
- Table 114 - Production of Refrigeration Appliances: Total Volume 2019-2024
- Table 115 - Forecast Sales of Refrigeration Appliances by Category: Volume 2024-2029
- Table 116 - Forecast Sales of Refrigeration Appliances by Category: Value 2024-2029
- Table 117 - Forecast Sales of Refrigeration Appliances by Category: % Volume Growth 2024-2029
- Table 118 - Forecast Sales of Refrigeration Appliances by Category: % Value Growth 2024-2029

## Air Treatment Products in France

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

The poor weather in 2024 impacts demand for cooling fans but focus on health and wellbeing boosts demand for air purifiers  
Air conditioners continues to grow despite obstacles  
Distribution landscape influenced by the product type and the search for value

### PROSPECTS AND OPPORTUNITIES

Online marketplaces expected to influence the future of air treatment products  
Cooling driven by ACs, in competition with heat pumps  
Air purifiers still full of potential as pollution concerns rise

### CATEGORY DATA

Table 119 - Sales of Air Treatment Products by Category: Volume 2019-2024  
Table 120 - Sales of Air Treatment Products by Category: Value 2019-2024  
Table 121 - Sales of Air Treatment Products by Category: % Volume Growth 2019-2024  
Table 122 - Sales of Air Treatment Products by Category: % Value Growth 2019-2024  
Table 123 - Sales of Air Conditioners by Smart Appliances: % Volume 2020-2024  
Table 124 - NBO Company Shares of Air Treatment Products: % Volume 2020-2024  
Table 125 - LBN Brand Shares of Air Treatment Products: % Volume 2021-2024  
Table 126 - Distribution of Air Treatment Products by Format: % Volume 2019-2024  
Table 127 - Production of Air Conditioners: Total Volume 2019-2024  
Table 128 - Forecast Sales of Air Treatment Products by Category: Volume 2024-2029  
Table 129 - Forecast Sales of Air Treatment Products by Category: Value 2024-2029  
Table 130 - Forecast Sales of Air Treatment Products by Category: % Volume Growth 2024-2029  
Table 131 - Forecast Sales of Air Treatment Products by Category: % Value Growth 2024-2029

## Food Preparation Appliances in France

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Sales of cooking robots coming under pressure as consumers have other priorities  
Food preparation market suffers arbitrages  
Shark-Ninja takes France by storm with new and innovative products

### PROSPECTS AND OPPORTUNITIES

Robots will come back to growth mid-forecast period  
Appliances that accompany more health developments  
Retailers likely to focus on omnichannel strategies to deliver the strongest results

### CATEGORY DATA

Table 132 - Sales of Food Preparation Appliances by Category: Volume 2019-2024  
Table 133 - Sales of Food Preparation Appliances by Category: Value 2019-2024  
Table 134 - Sales of Food Preparation Appliances by Category: % Volume Growth 2019-2024  
Table 135 - Sales of Food Preparation Appliances by Category: % Value Growth 2019-2024  
Table 136 - NBO Company Shares of Food Preparation Appliances: % Volume 2020-2024  
Table 137 - LBN Brand Shares of Food Preparation Appliances: % Volume 2021-2024  
Table 138 - Distribution of Food Preparation Appliances by Format: % Volume 2019-2024  
Table 139 - Forecast Sales of Food Preparation Appliances by Category: Volume 2024-2029  
Table 140 - Forecast Sales of Food Preparation Appliances by Category: Value 2024-2029

Table 141 - Forecast Sales of Food Preparation Appliances by Category: % Volume Growth 2024-2029

Table 142 - Forecast Sales of Food Preparation Appliances by Category: % Value Growth 2024-2029

## Personal Care Appliances in France

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Oral care appliances props up sales of personal care appliances as consumers economise

Competition heats up in hair care appliances as Dyson Airstait hits retailers' shelves in 2024

E-commerce on the up as consumers look for value and convenience

### PROSPECTS AND OPPORTUNITIES

Focus on dental health set to continue fuelling strong demand for oral care appliances

Body shavers with lower growth potential, hair styling still with some potential

Online marketplaces expected to be fertile ground for sales of personal care appliances

### CATEGORY DATA

Table 143 - Sales of Personal Care Appliances by Category: Volume 2019-2024

Table 144 - Sales of Personal Care Appliances by Category: Value 2019-2024

Table 145 - Sales of Personal Care Appliances by Category: % Volume Growth 2019-2024

Table 146 - Sales of Personal Care Appliances by Category: % Value Growth 2019-2024

Table 147 - Sales of Body Shavers by Format: % Volume 2019-2024

Table 148 - Sales of Hair Care Appliances by Format: % Volume 2019-2024

Table 149 - NBO Company Shares of Personal Care Appliances 2020-2024

Table 150 - LBN Brand Shares of Personal Care Appliances 2021-2024

Table 151 - Distribution of Personal Care Appliances by Format: % Volume 2019-2024

Table 152 - Forecast Sales of Personal Care Appliances by Category: Volume 2024-2029

Table 153 - Forecast Sales of Personal Care Appliances by Category: Value 2024-2029

Table 154 - Forecast Sales of Personal Care Appliances by Category: % Volume Growth 2024-2029

Table 155 - Forecast Sales of Personal Care Appliances by Category: % Value Growth 2024-2029

## Small Cooking Appliances in France

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Air fryers and pod coffee machines key to growth in 2024

Other appliances of the category have mixed performances

Competition remains strong in 2024 with a focus on partnerships, price promotions, marketing and innovation

### PROSPECTS AND OPPORTUNITIES

Air fryers likely to remain the main source of growth

Focus on healthy cooking should drive more sales in some categories

Distribution and sustainability likely to be a focus of younger consumers when shopping for small cooking appliances

### CATEGORY DATA

Table 156 - Sales of Small Cooking Appliances by Category: Volume 2019-2024

Table 157 - Sales of Small Cooking Appliances by Category: Value 2019-2024

Table 158 - Sales of Small Cooking Appliances by Category: % Volume Growth 2019-2024

Table 159 - Sales of Small Cooking Appliances by Category: % Value Growth 2019-2024

Table 160 - Sales of Freestanding Hobs by Format: % Volume 2019-2024

Table 161 - NBO Company Shares of Small Cooking Appliances: % Volume 2020-2024

Table 162 - LBN Brand Shares of Small Cooking Appliances: % Volume 2021-2024

Table 163 - Distribution of Small Cooking Appliances by Format: % Volume 2019-2024

Table 164 - Forecast Sales of Small Cooking Appliances by Category: Volume 2024-2029

Table 165 - Forecast Sales of Small Cooking Appliances by Category: Value 2024-2029

Table 166 - Forecast Sales of Small Cooking Appliances by Category: % Volume Growth 2024-2029

Table 167 - Forecast Sales of Small Cooking Appliances by Category: % Value Growth 2024-2029

Vacuum Cleaners in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Steady sales of traditional models
- Rise of the robots
- Dyson and Rowenta lead, with Shark making waves

PROSPECTS AND OPPORTUNITIES

- Wet and dry models expected to benefit from further growth while right-to-repair legislation should present challenges and opportunities
- Premiumisation could be key to growth
- Distribution landscape likely to remain stable albeit with a growing focus on e-commerce

CATEGORY DATA

Table 168 - Sales of Vacuum Cleaners by Category: Volume 2019-2024

Table 169 - Sales of Vacuum Cleaners by Category: Value 2019-2024

Table 170 - Sales of Vacuum Cleaners by Category: % Volume Growth 2019-2024

Table 171 - Sales of Vacuum Cleaners by Category: % Value Growth 2019-2024

Table 172 - Sales of Robotic Vacuum Cleaners by Smart Appliances: % Volume 2020-2024

Table 173 - NBO Company Shares of Vacuum Cleaners: % Volume 2020-2024

Table 174 - LBN Brand Shares of Vacuum Cleaners: % Volume 2021-2024

Table 175 - Distribution of Vacuum Cleaners by Format: % Volume 2019-2024

Table 176 - Forecast Sales of Vacuum Cleaners by Category: Volume 2024-2029

Table 177 - Forecast Sales of Vacuum Cleaners by Category: Value 2024-2029

Table 178 - Forecast Sales of Vacuum Cleaners by Category: % Volume Growth 2024-2029

Table 179 - Forecast Sales of Vacuum Cleaners by Category: % Value Growth 2024-2029

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](http://www.euromonitor.com/consumer-appliances-in-france/report).