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France 'Not Receptive' To Self-Care, But Wellness And E-Commerce Trends Are Driving Change

by [David Ridley](#)

Regulatory barriers, government conservatism and a generous reimbursement system have all held back the development of France's self-care market. However, executive director of the French self-care industry association, Luc Besançon, thinks that the growing trends for prevention and e-commerce will change this in the future.

France has one of the largest economies in Europe, roughly in joint second place behind Germany alongside the UK.

In comparison to its closest rivals, however, France's self-medication market is relatively weak, representing only about 8% of the country's total pharmaceutical market, compared to roughly 10% in Germany and the UK, according to the latest data from the Association of the European Self-Care Industry.

Furthermore, during COVID-19, France's self-medication market has tanked, shrinking by almost 10% to €1.8bn in 2020, for example. (Also see "[French OTC Sales Tumble In 2020](#)" - HBW Insight, 15 Feb, 2021.)

The Global Self-Care Federation's recently published Self-Care Readiness Index report has identified a lack of appreciation for the economic value of self-care by the French government.

Government Skepticism And Over Regulation Holding Back Self-Care In France – GSCF Analysis

By [David Ridley](#)

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France's self-medication market lags behind its European rivals. Why is that? A skeptical

There is hope, however. In this exclusive interview, Luc Besançon, executive director of French self-care industry association NèreS, points to trends driven by COVID-19 that have the potential to open up this currently stunted market.

Firstly, a growing concern for well-being among French consumers, seen elsewhere in the world, has boosted sales of dietary supplements, in turn driving consumer healthcare innovation, Besançon reveals.

Secondly, and partly accelerated for this demand for wellness products, France's online pharmacy channel is growing.

Despite conservative rules around the online sales of OTC medicines, Besançon believes that consumer healthcare e-commerce will "ultimately develop in France."

and over-cautious government and a stifling regulatory system may provide at least part of the answer, the Global Self-Care Federation's recently published Self-Care Readiness Index suggests.

[Read the full article here](#)

Q Where does France's conservatism with regards to OTC medicines come from and what is NèreS doing to change this situation?

A This situation has two major roots. First of all, for many years, many OTC medicines have been reimbursed provided that they are prescribed by a medical doctors. Currently almost 60% of the OTC market is prescribed and 56% of all OTC medicines are reimbursed by the national health insurance system. There is therefore a well-established expectation among consumers that healthcare is fully covered and that if (OTC) medicines are not reimbursed, they are not effective. Moreover, a few health scandals have shaped the current legal and regulatory framework, with a stronger emphasis on the notion of the "precaution principle" and the personal responsibility of policy makers. Consequently, many Ministers of Health or government officials (such the directors of our medicines agency) have had to defend their decisions (or absence of decision) in front of a court. This situation has had an impact on how liberalization is considered by policy makers in France. As highlighted in the GSCF report, furthermore, the term "self-care" is neither used nor has an equivalent in the French language. But this doesn't prevent NèreS from advocating of the value and safety of our products to policy makers, regulators, members of parliament. Our

proposals for the coming 2022 presidential elections aim to address these concerns as well as push for an enabling environment for self-care products in France. We have also developed a vision for how we want our sector to be by 2027.

Q According to NèreS data, sales of OTC drugs were significantly down in 2020, whereas sales of dietary supplements grew and self-care medical devices boomed. Why was that?

A During 2020, France witnessed a wide usage of masks, as well as the implementation of strict social distancing and enforced confinement. All together, they have had a significant impact on the intensity of common winter ailments (such as gastroenteritis, common cold, flu), reflected in the sales of cold and cough as well as digestive OTC medicines. Food supplements have been quite popular in France, as they offered solutions for stress and for boosting immunity, responding to the needs of people during this crisis.

Q Within the dietary supplements category, sleep/relax, energy and immunity products all grew double digits during COVID. What does this say about the health and wellness priorities of French consumers, and how can consumer health companies operating in the country capitalize on these trends?

A As in many other European markets, French consumers are interested in prevention as well as natural products. Food supplements therefore directly benefit from this trend, which has become even stronger during to COVID-19. The French food authority has also developed a more balanced regulatory framework for the food supplement industry, which has supported the growth of this sector. In 2020, over 1,000 new food supplements were put on the French market, and innovation has been a key enabler of this growth. Two major channels have benefited from this development: community pharmacies (accounting for more than 50% of the total sales) and e-commerce. In late 2021, we commissioned a comprehensive study among over 2,600 consumers of food supplements and the results are about to be shared with our members to help them identify and activate levers for this market.

Q Community pharmacy was the preferred channel for consumers to buy OTC products. Why is France going against wider European trends, in which e-commerce benefited hugely from COVID?

A Community pharmacists have expanded their roles significantly over the last decade and consequently their organizations have increased their influence among policy makers. Such influence has also been used to limit the liberalization of the online sales channel, successfully countering several attempts at liberalization so far. Moreover, policy makers often perceive e-commerce (especially for OTC medicines) as a source of irrational purchase and/or risk for patient safety. The push for e-commerce in the self-care sector is also not widely supported by consumer or patient organisations in France. This can be explained by the fact that OTC medicines in France are usually very cheap (compared to other European countries) and their reimbursement is not possible if bought online.

Q Does this bode well for community pharmacy which is facing the same threat from foreign e-pharmacies as Germany, for example, has in the past few years?

A We believe that e-commerce will ultimately develop in France, despite the current limitations for local players as well as for foreign companies. The development will be to the detriment of large and urban community pharmacies. So far, the French market has been protected by the legal framework as well as the reimbursement of OTC medicines. But clearly the current situation impedes the development of national e-commerce players, while foreign companies gain significant know-how from their international experience and are able to patiently build their customer bases.