2023

France Distributors' Promotional Products Sales

This study was carried out with the support of the EAC, the European Associations Cooperation.

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Executive **Summary**

Brief Overview

The French promotional products industry achieved a total estimated sales volume of **€2.093 billion** in 2023 (approximately USD $2.26 billion).

The French promotional products market is projected to decline by **3.2%** in 2024 to **€2.026 billion** (USD $2.188 billion), reflecting macroeconomic pressures, evolving client priorities, and a shift toward smaller unit sizes despite larger order volumes.

Online sales accounted for **24.53%** of the total sales volume, amounting to approximately **€513.38 million.** companies generating over €30 million in revenue contributed **51%,** highlighting the dominance of large enterprises in leveraging digital platforms for sales.

Despite the growing role of digital channels, only **42.75%** of companies reported an online presence, underscoring the potential for further integration of inventory stores and company websites to expand market reach and drive future growth.

Sustainability sales contributed **€703.41 million (33.61%)** of the total market, driven by mid-sized companies (€2M–€10M), which contributed **40.85%.** Larger companies (over €30 million in revenue) demonstrated full adoption of sustainable practices, securing their leadership position.

A focus on sustainable products is ubiquitous across the market, as **89.96%** of companies reported sales made on the basis of their products' sustainability. Among larger companies, in the €10M-€30M and >€30M categories, all companies reported sales made on sustainable grounds.

Year-over-year (2023 vs. 2022), total sales volume declined by **€39.09 million (-1.87%),** with the most significant decline of **€314.53 million** occurring in the €2M–€10M segment, despite 70.37% of companies in this category reporting individual growth. Smaller companies (<€100K) exhibited resilience, achieving a 34.44% increase in sales over 2022.

All EURO to USD conversions are based on the average exchange rate of 1 EURO = 1.08 USD for 2023.

Promotional products comprise useful and/or decorative articles of merchandise that are used in marketing and communication programs. The items include wearables, writing instruments, calendars, drinkware, and many other items, usually imprinted with a company's name, logo, or message. Premiums, incentives, advertising specialties, business gifts, awards, and commemoratives are also considered promotional products. Promotional products are used in marketing and nonmarketing (e.g., employee motivation) contexts.

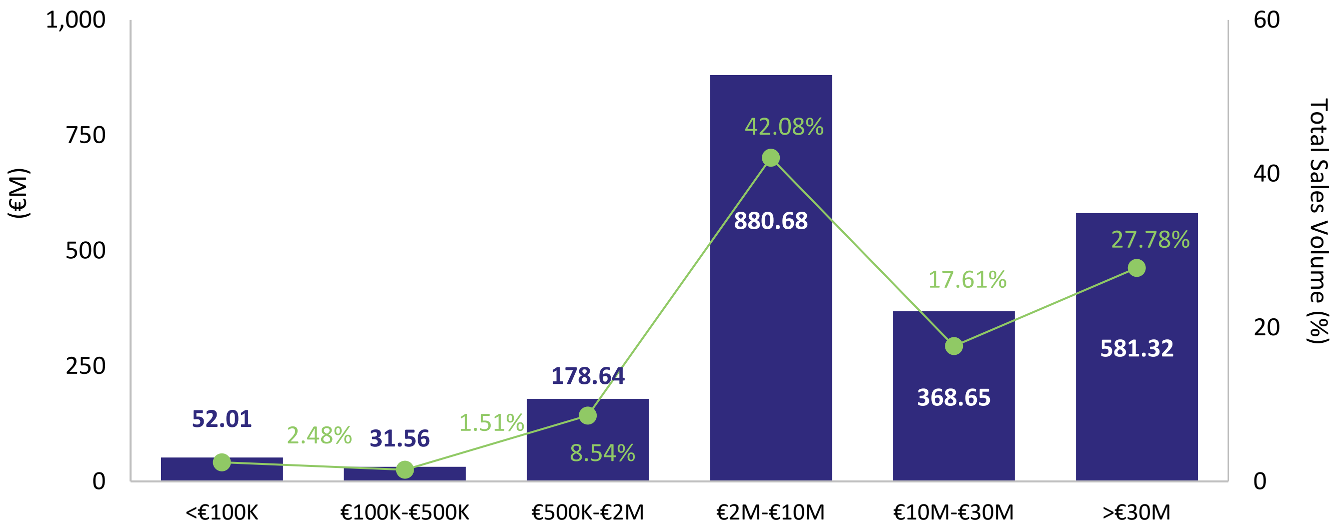
Key Findings

The inaugural sales volume study for France estimates the promotional product industry's market size at **€2.093 billion** (€2,092,869,598, approximately USD $2.26 billion).

The median sales volume for companies across all sizes is **€880,682** (approximately USD $951,137), while companies with annual sales exceeding **€2 million** dominate the market, accounting for over **87.47%** of the total sales volume, driven by mid-sized and large distributors.

The average industry sales volume per company stands at **€1.33 million** (approximately USD $1.44 million), reflecting the considerable influence of larger distributors on the market.

Figure 1: Segmenting Industry Sales by Company Size, 2023



Company Size	2023	Percentage of Total Sales Volume
<€100K	€52.006 M	2.48%
€100K-€500K	€31.562 M	1.51%
€500K-€2M	€178.643 M	8.54%
€2M-€10M	€880.682 M	42.08%
€10M-€30M	€368.654 M	17.61%
>€30M	€581.322 M	27.78%
Total	**€2.093 B**	

Rounded to the nearest million

Online Sales

Online sales through inventory stores and company websites accounted for **24.53%** of the total sales volume in 2023, amounting to **€513.38 million,** with companies generating over **€30 million** in revenue contributing **51%** of this total. These companies, with complete online adoption, effectively leveraged digital platforms to streamline operations and secure a substantial share of their sales.

Despite the growing role of digital channels, only **42.75%** of companies reported an online presence, highlighting the potential for further integration of inventory stores and company websites to expand market reach and drive future growth.

It should be noted that these estimates may not fully capture the actual sales volumes by each channel. A significant number of distributors do not distinguish between sales sources when tracking online transactions, potentially leading to an underestimation of the accurate figures.

Figure 2. Percentage of Online Sales in Total Sales Volume, 2023

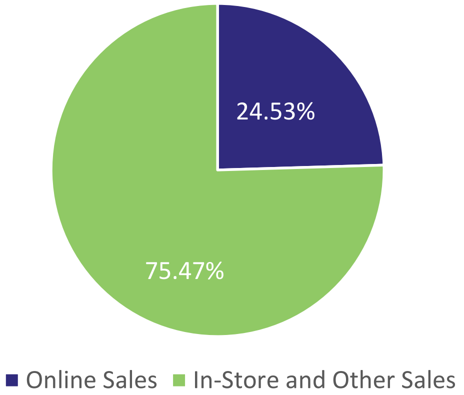
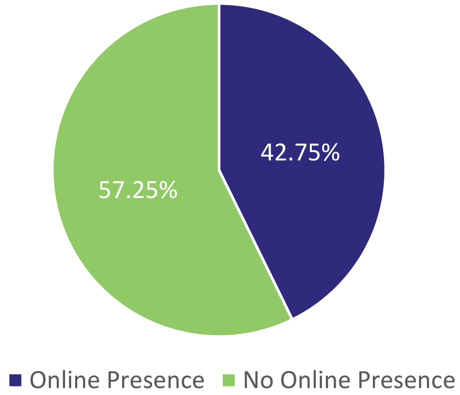
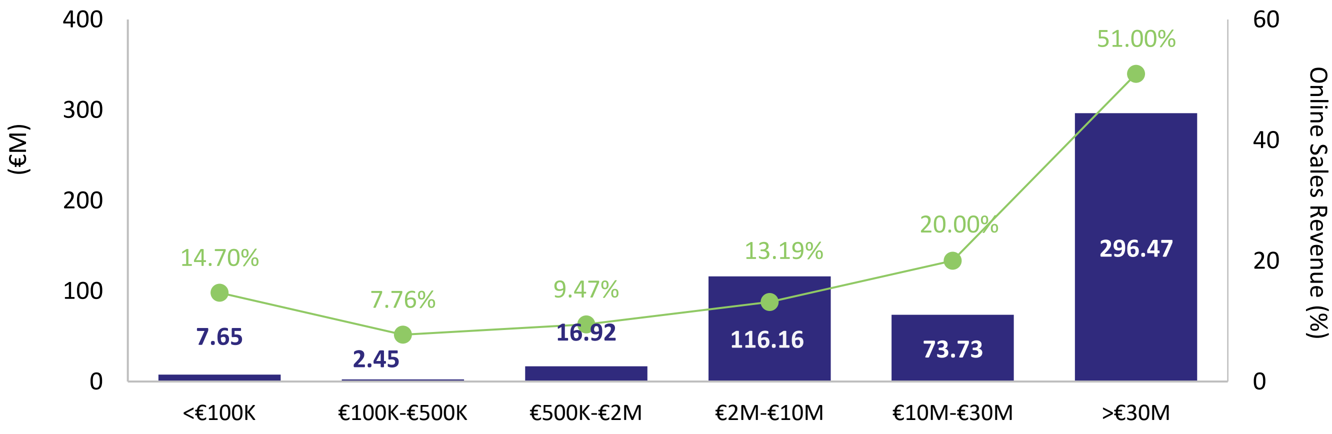


Figure 3. Percentage of Companies with and without Online Presence, 2023





Rounded to the nearest million

Sustainable **Product Sales**

Sustainability sales accounted for **33.61%** of the total sales volume in 2023, amounting to **€703.41 million,** with companies generating €2M-€10M in revenue contributing **40.85%** of this total. Larger companies (>€30 million) collectively contributed **26%,** reflecting their capacity to grow in sustainable practices and meet increasing market demands for eco-friendly solutions.

A focus on sustainable products is ubiquitous across the market, as **89.96%** of companies reported sales made on the basis of their products' sustainability. Among larger companies, in the €10M-€30M and >€30M categories, all companies reported sales made on sustainable grounds.

It should be noted that these estimates may not fully capture the entire scope of sustainability-related activities. Some companies may underreport or fail to differentiate sustainability revenue in their total sales, potentially leading to a conservative representation of the true impact of sustainable practices in the promotional products market.

Figure 4. Percentage of Sustainable Product Sales in Total Sales Volume, 2023

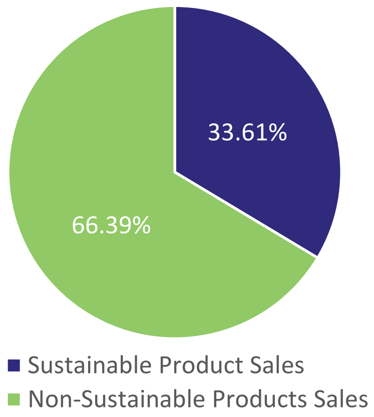
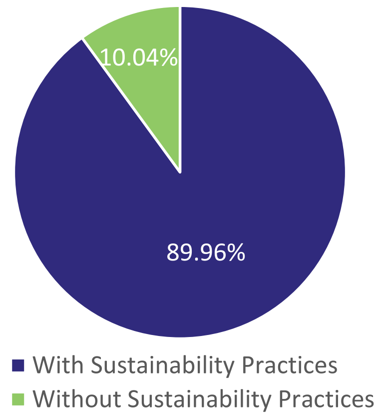
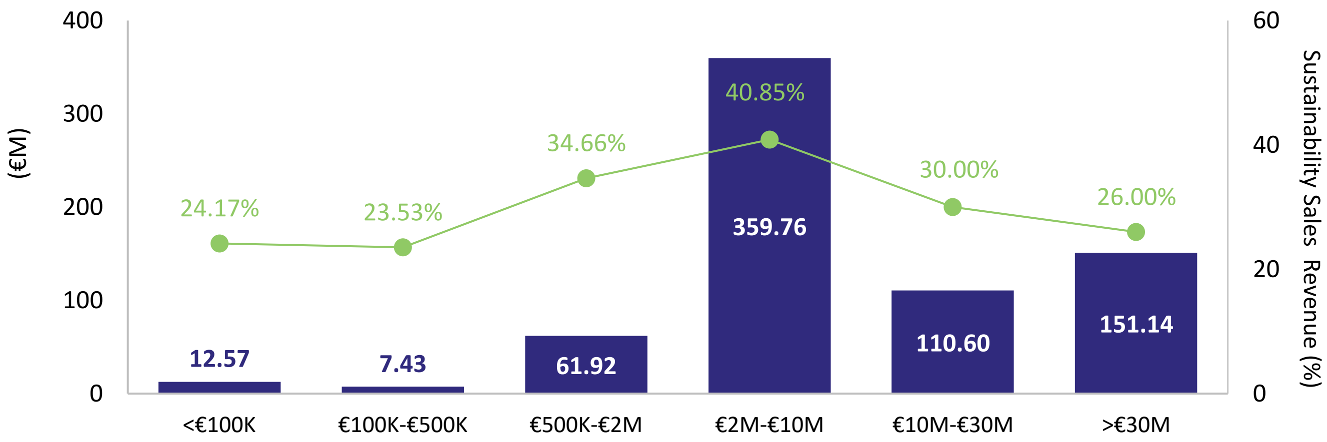


Figure 5. Presence of Sustainability Practices in Companies, 2023





Rounded to the nearest million

Outlook 2024 Sales Projections

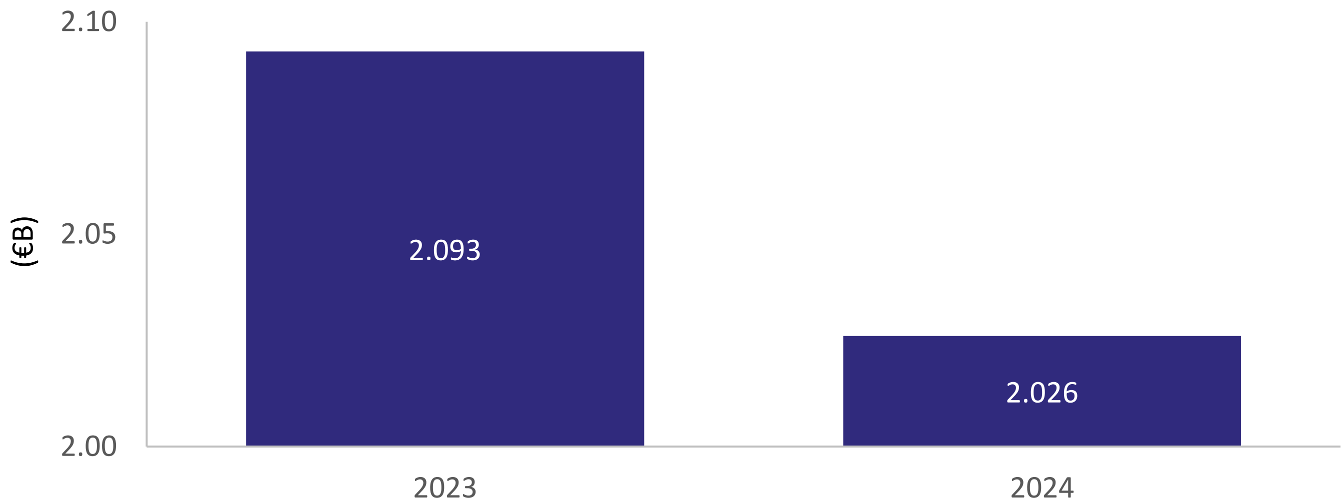
The sales volume for **2024** is projected to decline by **3.2%,** reaching **€2.026 billion (approximately USD $2.188 billion),** signaling a modest contraction in the French promotional products market. This projection reflects the interplay of macroeconomic challenges, cautious client spending, and evolving market dynamics.

While larger orders were placed, a notable reduction in unit sizes impacted overall sales volumes, emphasizing shifts in purchasing behavior. The constrained economic environment and shifting priorities among clients further illustrate the need for recalibrated strategies within the industry.

The 2024 Paris Olympics, while presenting significant opportunities, faced budgetary freezes and political uncertainties that curtailed promotional spending, limiting its potential market impact. December 2024, typically a peak period for promotional activities, underperformed as both corporate and public sector spending remained restrained.

These factors, combined with lower-than-anticipated end-user budgets, have amplified the challenges for distributors navigating the current landscape. Additional pressures, including modest GDP growth, inflationary trends, and selective adoption of sustainability projects, further shaped market behavior. Clients favored niche products, leaving broader opportunities underutilized. This projected decline underscores the necessity for strategic adaptation and innovation as the industry prepares to capitalize on opportunities in 2025 and beyond.

Figure 6: Distributors' 2024 Sales Predictions



Year	Sales Volume (€)	Annual Growth Rate (%)
2023	€2.093 B	
2024	€2.026 B	-3.2%

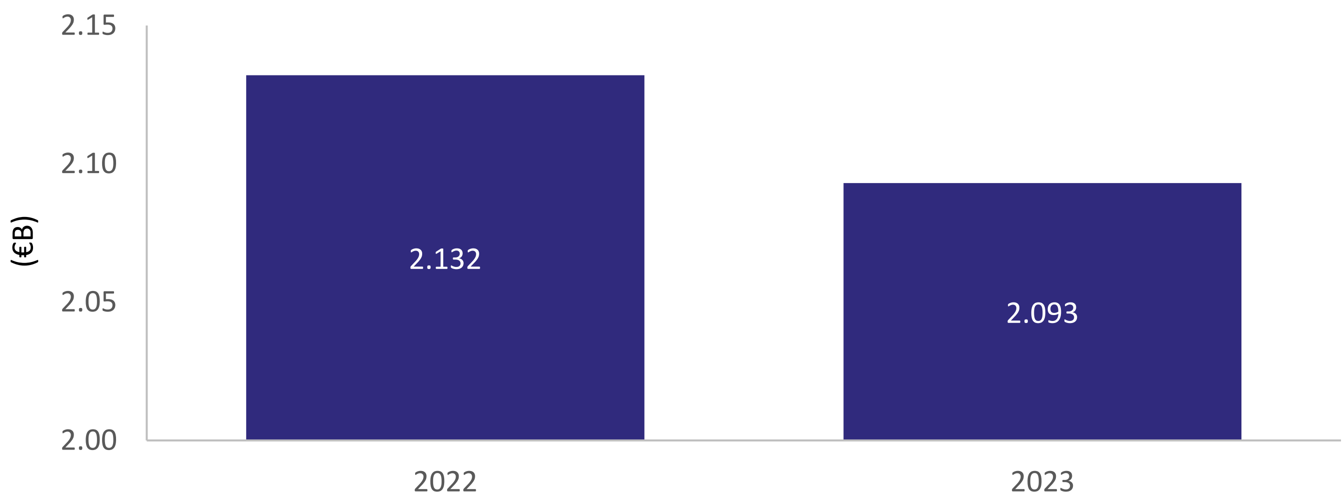
Rounded to the nearest million

Year-Over-Year Comparison (2023 vs. 2022)

The total sales volume for the French promotional products industry declined by **€39.087 million (-1.87%),** from **€2.132 billion** in 2022 to **€2.093 billion in 2023,** reflecting macroeconomic pressures and challenging market conditions. The most significant decline occurred in the €2M-€10M segment, which saw a decrease of €314.529 million, despite 70.37% of companies in this category reporting individual growth.

Smaller companies (<€100K) demonstrated resilience, achieving a **34.44% increase** in sales compared to 2022, highlighting their adaptability in navigating market challenges. This contrasts sharply with larger segments, where overall declines were more pronounced, driven by reduced order values and shorter lead times.

Figure 7: France Distributors Sales Experience, Comparing 2023 to 2022



Year	Sales Volume (€)	Annual Growth Rate (%)
2022	€2.132 B	
2023	€2.093 B	-1.87%

Rounded to the nearest million

APPENDIX

Purpose of the Research

Since 1965, the Promotional Products Association International (PPAI) and its predecessors have secured data on the annual sales of distributors. The information is used primarily to measure industry growth and to convey to prospective buyers of promotional products the magnitude of the industry and the wide acceptance of the products it produces and sells.

The current method of study was adopted in 1983 after an extensive examination of the strengths and weaknesses of sales reporting methods used by several other marketing-related industries, including mass media advertising. Since then, the research's basic methodology and objective to produce a valid estimate of distributor sales in the United States have remained unchanged. Modifications have been reviewed over time by PPAI's Marketing Information & Research Committee and expanded where desirable (for example, in assessing internet activity in business sales).

With few exceptions (largely in the aftermath of the 9/11 terrorism-abetted economic downturn in 2002, the global recession beginning in fall 2008, and the COVID-19 pandemic in 2019-2020), this annual estimate of U.S. distributor promotional products sales has shown a general increase in business over the years and has even eclipsed the growth rates in many mass media advertising and promotion alternatives.

As a result, the survey has become an important element in revealing the changing picture of the promotional products industry in context. This continues to be relevant as the global pandemic caused by COVID-19 has been affecting the economies of many countries through different waves, including the U.S., which is still feeling the economic impact of disrupted supplier chains, inflation, and job market changes in different industries.

For the first time, PPAI has conducted this sales volume study in France in collaboration with French promotional product associations, including CTCO, European Sourcing, 2FPCO, and Premium Sourcing. This report is based on an email survey of industry distributors, including members and nonmembers of these associations. It provides a comprehensive analysis of distributor sales in France, offering insights into the evolving dynamics of the French promotional products market. This initiative aligns with PPAI's ongoing commitment to provide valuable data and industry benchmarks for its global partners.

Research Methodology

PPAI has been a leader in researching and releasing industry sales data since 1965. This annual distributor sales study is widely regarded as one of the most definitive and comprehensive in the promotional products industry, based on actual sales data reported by distributors.

This survey was conducted in the French market for the first time, in collaboration with leading promotional product associations, including CTCO, European Sourcing, 2FPCO, and Premium Sourcing. The survey was available in both English and French, ensuring accessibility for a wide range of participants.

To compile the 2023 estimate of French distributors' promotional products sales, the survey was distributed via email to members and nonmembers of the associations. The sample was drawn from industry-specific databases, including those maintained by CTCO and European Sourcing.

Participants were asked to provide information about:

- Total gross sales range
- Percentage of gross sales attributed to promotional products
- Percentage of total sales generated through online channels (customer orders placed via online stores or websites)
- Percentage of sales derived from sustainable or eco-friendly products
- Sales volume by company size and industry segments
- Year-over-year changes in sales compared to 2022
- Sales and profit projections for 2024

Research Lead

Alok Bhat

Market Economist & Senior Manager, Research & Public Affairs, PPAI

Program Manager

Jessica Guir

Marketing Project Manager, Premium Sourcing, CTCO, C!mag, Infopro Digital Trade Shows

Data Analytics

Shiella Aparis

Research Coordinator, PPAI

Research Editor

Rachel Zoch

Public Affairs and Research Editor, PPAI