

Fresh Food in France

January 2024

Table of Contents

Fresh Food in France

EXECUTIVE SUMMARY

Fresh food in 2023: The big picture

2023 key trends

Retailing developments

What next for fresh food?

MARKET DATA

- Table 1 Total Sales of Fresh Food by Category: Total Volume 2018-2023
- Table 2 Total Sales of Fresh Food by Category: % Total Volume Growth 2018-2023
- Table 3 Retail Sales of Fresh Food by Category: Volume 2018-2023
- Table 4 Retail Sales of Fresh Food by Category: % Volume Growth 2018-2023
- Table 5 Retail Sales of Fresh Food by Category: Value 2018-2023
- Table 6 Retail Sales of Fresh Food by Category: % Value Growth 2018-2023
- Table 7 Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2018-2023
- Table 8 Retail Distribution of Fresh Food by Format: % Volume 2018-2023
- Table 9 Forecast Total Sales of Fresh Food by Category: Total Volume 2023-2028
- Table 10 Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2023-2028
- Table 11 Forecast Retail Sales of Fresh Food by Category: Volume 2023-2028
- Table 12 Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2023-2028
- Table 13 Forecast Retail Sales of Fresh Food by Category: Value 2023-2028
- Table 14 Forecast Retail Sales of Fresh Food by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Eggs in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Relatively stable sales, despite disruptions caused by the avian flu outbreaks

Free-range eggs and organic eggs remain the most popular, with ongoing moves to ban battery farms

PROSPECTS AND OPPORTUNITIES

Sales will remain supported by eggs being a staple in French cooking, as producers learn to better manage avian flu outbreaks Sustainable egg production will continue to be a key focus

Summary 2 - Major Processors of Eggs 2023

CATEGORY DATA

- Table 15 Total Sales of Eggs: Total Volume 2018-2023
- Table 16 Total Sales of Eggs: % Total Volume Growth 2018-2023
- Table 17 Retail Sales of Eggs: Volume 2018-2023
- Table 18 Retail Sales of Eggs: % Volume Growth 2018-2023
- Table 19 Retail Sales of Eggs: Value 2018-2023
- Table 20 Retail Sales of Eggs: % Value Growth 2018-2023
- Table 21 Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2018-2023
- Table 22 Forecast Total Sales of Eggs: Total Volume 2023-2028
- Table 23 Forecast Total Sales of Eggs: % Total Volume Growth 2023-2028
- Table 24 Forecast Retail Sales of Eggs: Volume 2023-2028
- Table 25 Forecast Retail Sales of Eggs: % Volume Growth 2023-2028

Table 26 - Forecast Retail Sales of Eggs: Value 2023-2028

Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2023-2028

Fish and Seafood in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales of fish and seafood fall into an expected slump due to high prices

Oyster industry suffers losses caused by environmental pollution

PROSPECTS AND OPPORTUNITIES

Overall stable demand expected to continue, with government promoting local production

Fresh seafood will continue to face competition from cheaper shelf stable and frozen options, while fish alternatives remain niche

Summary 3 - Major Processors of Fish and Seafood 2023

CATEGORY DATA

Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2018-2023

Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2018-2023

Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2018-2023

Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2018-2023

Table 32 - Retail Sales of Fish and Seafood by Category: Value 2018-2023

Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2018-2023

Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2018-2023

Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2023-2028

Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2023-2028

Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2023-2028

Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2023-2028

Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2023-2028

Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2023-2028

Fruits in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Climate conditions affect the performance of fruits

Organic labelling still has potential for fruits in France

PROSPECTS AND OPPORTUNITIES

Climate factors will continue to influence production trends

Anti-waste laws influence packaging formats for fresh fruits

Summary 4 - Major Processors of Fruits 2023

CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2018-2023

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2018-2023

Table 43 - Retail Sales of Fruits by Category: Volume 2018-2023

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2018-2023

Table 45 - Retail Sales of Fruits by Category: Value 2018-2023

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2018-2023

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2018-2023

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2023-2028

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2023-2028

- Table 50 Forecast Retail Sales of Fruits by Category: Volume 2023-2028
- Table 51 Forecast Retail Sales of Fruits by Category: % Volume Growth 2023-2028
- Table 52 Forecast Retail Sales of Fruits by Category: Value 2023-2028
- Table 53 Forecast Retail Sales of Fruits by Category: % Value Growth 2023-2028

Meat in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Meat remains a mainstay in French meals, with some trading down due to inflationary pressures Poultry industry continues along its recovery following the avian flu cull

PROSPECTS AND OPPORTUNITIES

Meat substitutes slow to take off in France, leading to a challenge with climate commitments Direct-from-farm sales expected to grow further over the forecast period

Summary 5 - Major Processors of Meat 2023

CATEGORY DATA

- Table 54 Total Sales of Meat by Category: Total Volume 2018-2023
- Table 55 Total Sales of Meat by Category: % Total Volume Growth 2018-2023
- Table 56 Retail Sales of Meat by Category: Volume 2018-2023
- Table 57 Retail Sales of Meat by Category: % Volume Growth 2018-2023
- Table 58 Retail Sales of Meat by Category: Value 2018-2023
- Table 59 Retail Sales of Meat by Category: % Value Growth 2018-2023
- Table 60 Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2018-2023
- Table 61 Forecast Sales of Meat by Category: Total Volume 2023-2028
- Table 62 Forecast Sales of Meat by Category: % Total Volume Growth 2023-2028
- Table 63 Forecast Retail Sales of Meat by Category: Volume 2023-2028
- Table 64 Forecast Retail Sales of Meat by Category: % Volume Growth 2023-2028
- Table 65 Forecast Retail Sales of Meat by Category: Value 2023-2028
- Table 66 Forecast Retail Sales of Meat by Category: % Value Growth 2023-2028

Nuts in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Nuts manage to maintain sales due to player adaptation, despite challenges seen in the industry Ongoing research into natural pesticides will help boost local production

PROSPECTS AND OPPORTUNITIES

Sales continue to be supported by snacking trends, with a healthy positioning being used to justify high prices New bulk retailing laws help to stimulate bulk sales of nuts through large retailers

Summary 6 - Major Processors of Nuts 2023

CATEGORY DATA

- Table 67 Total Sales of Nuts by Category: Total Volume 2018-2023
- Table 68 Total Sales of Nuts by Category: % Total Volume Growth 2018-2023
- Table 69 Retail Sales of Nuts by Category: Volume 2018-2023
- Table 70 Retail Sales of Nuts by Category: % Volume Growth 2018-2023
- Table 71 Retail Sales of Nuts by Category: Value 2018-2023
- Table 72 Retail Sales of Nuts by Category: % Value Growth 2018-2023
- Table 73 Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2018-2023

- Table 74 Forecast Total Sales of Nuts by Category: Total Volume 2023-2028
- Table 75 Forecast Total Sales of Nuts by Category: % Total Volume Growth 2023-2028
- Table 76 Forecast Retail Sales of Nuts by Category: Volume 2023-2028
- Table 77 Forecast Retail Sales of Nuts by Category: % Volume Growth 2023-2028
- Table 78 Forecast Retail Sales of Nuts by Category: Value 2023-2028
- Table 79 Forecast Retail Sales of Nuts by Category: % Value Growth 2023-2028

Pulses in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales in pulses supported by such products being an economic option and offering convenience Climatic conditions lead to lower pulse production in France

PROSPECTS AND OPPORTUNITIES

Foodservice sales continue to drive growth thanks to popularity of international fast food dishes Health and environmental trends will continue to support pulses

Summary 7 - Major Processors of Pulses 2023

CATEGORY DATA

- Table 80 Total Sales of Pulses by Category: Total Volume 2018-2023
- Table 81 Total Sales of Pulses by Category: % Total Volume Growth 2018-2023
- Table 82 Retail Sales of Pulses by Category: Volume 2018-2023
- Table 83 Retail Sales of Pulses by Category: % Volume Growth 2018-2023
- Table 84 Retail Sales of Pulses by Category: Value 2018-2023
- Table 85 Retail Sales of Pulses by Category: % Value Growth 2018-2023
- Table 86 Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2018-2023
- Table 87 Forecast Total Sales of Pulses by Category: Total Volume 2023-2028
- Table 88 Forecast Total Sales of Pulses by Category: % Total Volume Growth 2023-2028
- Table 89 Forecast Retail Sales of Pulses by Category: Volume 2023-2028
- Table 90 Forecast Retail Sales of Pulses by Category: % Volume Growth 2023-2028
- Table 91 Forecast Retail Sales of Pulses by Category: Value 2023-2028
- Table 92 Forecast Retail Sales of Pulses by Category: % Value Growth 2023-2028

Starchy Roots in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fluctuating and unpredictable weather conditions continue to impact potatoes

Price hikes pose challenges for fresh starchy roots, as consumers seek convenience

PROSPECTS AND OPPORTUNITIES

"Exotic" and healthy sweet potatoes continue to attract attention

Climate factors will continue to pose challenges, as farmers experiment with new varieties

Summary 8 - Major Processors of Starchy Roots 2023

CATEGORY DATA

- Table 93 Total Sales of Starchy Roots by Category: Total Volume 2018-2023
- Table 94 Total Sales of Starchy Roots by Category: % Total Volume Growth 2018-2023
- Table 95 Retail Sales of Starchy Roots by Category: Volume 2018-2023
- Table 96 Retail Sales of Starchy Roots by Category: % Volume Growth 2018-2023
- Table 97 Retail Sales of Starchy Roots by Category: Value 2018-2023

- Table 98 Retail Sales of Starchy Roots by Category: % Value Growth 2018-2023
- Table 99 Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2018-2023
- Table 100 Forecast Total Sales of Starchy Roots by Category: Total Volume 2023-2028
- Table 101 Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2023-2028
- Table 102 Forecast Retail Sales of Starchy Roots by Category: Volume 2023-2028
- Table 103 Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2023-2028
- Table 104 Forecast Retail Sales of Starchy Roots by Category: Value 2023-2028
- Table 105 Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2023-2028

Sugar and Sweeteners in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Health trends continue to shine a negative light on basic white sugar

Foodservice and institutional volumes remain key, but lower levels of traditional sugar are also expected in these channels

PROSPECTS AND OPPORTUNITIES

Declining sugar consumption will lead to premiumisation and further innovation in alternative sugars

Natural sweeteners will continue to attract attention, with stevia remaining most popular

Summary 9 - Major Processors of Sugar and Sweeteners 2023

CATEGORY DATA

- Table 106 Total Sales of Sugar and Sweeteners: Total Volume 2018-2023
- Table 107 Total Sales of Sugar and Sweeteners: % Total Volume Growth 2018-2023
- Table 108 Retail Sales of Sugar and Sweeteners: Volume 2018-2023
- Table 109 Retail Sales of Sugar and Sweeteners: % Volume Growth 2018-2023
- Table 110 Retail Sales of Sugar and Sweeteners: Value 2018-2023
- Table 111 Retail Sales of Sugar and Sweeteners: % Value Growth 2018-2023
- Table 112 Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2018-2023
- Table 113 Forecast Total Sales of Sugar and Sweeteners: Total Volume 2023-2028
- Table 114 Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2023-2028
- Table 115 Forecast Retail Sales of Sugar and Sweeteners: Volume 2023-2028
- Table 116 Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2023-2028
- Table 117 Forecast Retail Sales of Sugar and Sweeteners: Value 2023-2028
- Table 118 Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2023-2028

Vegetables in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Overall stable demand for vegetables, despite the category facing some challenges

Fresh vegetables continue to face competition from canned and frozen equivalents

PROSPECTS AND OPPORTUNITIES

Government pushes for stronger local production, whilst challenges mean imports will continue

Sustainability laws and trends influence bio waste and packaging

Summary 10 - Major Processors of Vegetables 2023

CATEGORY DATA

Table 119 - Total Sales of Vegetables by Category: Total Volume 2018-2023

Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2018-2023

Table 121 - Retail Sales of Vegetables by Category: Volume 2018-2023

- Table 122 Retail Sales of Vegetables by Category: % Volume Growth 2018-2023
- Table 123 Retail Sales of Vegetables by Category: Value 2018-2023
- Table 124 Retail Sales of Vegetables by Category: % Value Growth 2018-2023
- Table 125 Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2018-2023
- Table 126 Forecast Total Sales of Vegetables by Category: Total Volume 2023-2028
- Table 127 Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2023-2028
- Table 128 Forecast Retail Sales of Vegetables by Category: Volume 2023-2028
- Table 129 Forecast Retail Sales of Vegetables by Category: % Volume Growth 2023-2028
- Table 130 Forecast Retail Sales of Vegetables by Category: Value 2023-2028
- Table 131 Forecast Retail Sales of Vegetables 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 focusing 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/fresh-food-in-france/report.