



Fresh Food in France

January 2026

Table of Contents

Fresh Food in France

EXECUTIVE SUMMARY

Health-led, value-driven demand supports fresh food expansion

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Prevailing health trends favour plant proteins as meat continues to struggle

Concerns with cost and ultra-processed foods shape behaviour, while premiumisation trend gains traction

WHAT'S NEXT?

Fresh food set to see stabilised sales and strong support for local produce

New trade agreement threatens fair competition, according to French farmers

CHANNELS

Supermarkets respond to local price sensitivity with broader ranges of affordable options

Popularity of click-and-collect propels e-commerce expansion

MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2020-2025

Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2020-2025

Table 3 - Retail Sales of Fresh Food by Category: Volume 2020-2025

Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2020-2025

Table 5 - Retail Sales of Fresh Food by Category: Value 2020-2025

Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2020-2025

Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2020-2025

Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2020-2025

Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2025-2030

Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2025-2030

Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2025-2030

Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2025-2030

Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Eggs in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Ethical upgrades support eggs despite cost pressure in foodservice

INDUSTRY PERFORMANCE

Eggs posts solid growth in France in 2025

Consumer choices driven by ethical considerations

WHAT'S NEXT?

Cage farming to be gradually phased out

Stabilised prices expected for early forecast period, though EUDR could see hikes

Summary 2 - Major Processors of Eggs 2025

CATEGORY DATA

- Table 15 - Total Sales of Eggs: Total Volume 2020-2025
- Table 16 - Total Sales of Eggs: % Total Volume Growth 2020-2025
- Table 17 - Retail Sales of Eggs: Volume 2020-2025
- Table 18 - Retail Sales of Eggs: % Volume Growth 2020-2025
- Table 19 - Retail Sales of Eggs: Value 2020-2025
- Table 20 - Retail Sales of Eggs: % Value Growth 2020-2025
- Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2020-2025
- Table 22 - Forecast Total Sales of Eggs: Total Volume 2025-2030
- Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2025-2030
- Table 24 - Forecast Retail Sales of Eggs: Volume 2025-2030
- Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2025-2030
- Table 26 - Forecast Retail Sales of Eggs: Value 2025-2030
- Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Fish and Seafood in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Supply normalisation supports modest recovery in fish and seafood

INDUSTRY PERFORMANCE

Fish and seafood rises slightly as restrictive constraints are lifted

Oyster industry still struggling following virus outbreak during review period

WHAT'S NEXT?

Slight rise in volumes expected despite challenges

Greater investment needed in promoting local fish and seafood

[Summary 3 - Major Processors of Fish and Seafood 2025](#)

CATEGORY DATA

- Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2020-2025
- Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2020-2025
- Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2020-2025
- Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2020-2025
- Table 32 - Retail Sales of Fish and Seafood by Category: Value 2020-2025
- Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2020-2025
- Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2020-2025
- Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2025-2030
- Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2025-2030
- Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2025-2030
- Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2025-2030
- Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2025-2030
- Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Fruits in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Convenience and affordability support fruit growth

INDUSTRY PERFORMANCE

Bananas benefit from convenience and affordability

Grand Frais offers novel retail experience, while organic segment still holds potential

WHAT'S NEXT?

Innovation to sustain growth, with blueberries holding potential for expansion

Climate volatility offers opportunities amid challenges

Summary 4 - Major Processors of Fruits 2025

CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2020-2025

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2020-2025

Table 43 - Retail Sales of Fruits by Category: Volume 2020-2025

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2020-2025

Table 45 - Retail Sales of Fruits by Category: Value 2020-2025

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2020-2025

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2020-2025

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2025-2030

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2025-2030

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2025-2030

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2025-2030

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2025-2030

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Meat in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Meat demand weakens as affordability and sustainability reshape choices

INDUSTRY PERFORMANCE

Stagnation sets in as the shift away from meat persists

Pre-packaged meat gains rapid ground in France

WHAT'S NEXT?

Positive growth forecast but meat faces difficult future

French farmers feel threatened by new trade agreement

Summary 5 - Major Processors of Meat 2025

CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2020-2025

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2020-2025

Table 56 - Retail Sales of Meat by Category: Volume 2020-2025

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2020-2025

Table 58 - Retail Sales of Meat by Category: Value 2020-2025

Table 59 - Retail Sales of Meat by Category: % Value Growth 2020-2025

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2020-2025

Table 61 - Forecast Sales of Meat by Category: Total Volume 2025-2030

Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2025-2030

- Table 63 - Forecast Retail Sales of Meat by Category: Volume 2025-2030
- Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2025-2030
- Table 65 - Forecast Retail Sales of Meat by Category: Value 2025-2030
- Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Nuts in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Local sourcing pushes nuts beyond an imported staple

INDUSTRY PERFORMANCE

Players increase investment in local production
Daco Bello adapts to evolving demand

WHAT'S NEXT?

Strong opportunities in local production
Bulk-buying law should bolster sales of nuts
Summary 6 - Major Processors of Nuts 2025

CATEGORY DATA

- Table 67 - Total Sales of Nuts by Category: Total Volume 2020-2025
- Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2020-2025
- Table 69 - Retail Sales of Nuts by Category: Volume 2020-2025
- Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2020-2025
- Table 71 - Retail Sales of Nuts by Category: Value 2020-2025
- Table 72 - Retail Sales of Nuts by Category: % Value Growth 2020-2025
- Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2020-2025
- Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2025-2030
- Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2025-2030
- Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2025-2030
- Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2025-2030
- Table 78 - Forecast Retail Sales of Nuts by Category: Value 2025-2030
- Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Pulses in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Plant-based habits sustain steady gains for pulses

INDUSTRY PERFORMANCE

Current health trends support growth for pulses in France
Canned alternatives limit growth for fresh pulses

WHAT'S NEXT?

Forecast period will see increased demand for locally grown products in pulses
Consumers anticipated to gradually shift towards bulk-buying dried pulses
Summary 7 - Major Processors of Pulses 2025

CATEGORY DATA

- Table 80 - Total Sales of Pulses by Category: Total Volume 2020-2025
- Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2020-2025
- Table 82 - Retail Sales of Pulses by Category: Volume 2020-2025
- Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2020-2025
- Table 84 - Retail Sales of Pulses by Category: Value 2020-2025
- Table 85 - Retail Sales of Pulses by Category: % Value Growth 2020-2025
- Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2020-2025
- Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2025-2030
- Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2025-2030
- Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2025-2030
- Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2025-2030
- Table 91 - Forecast Retail Sales of Pulses by Category: Value 2025-2030
- Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Starchy Roots in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Potato price correction pulls down category as sweet potatoes gain relevance

INDUSTRY PERFORMANCE

Volume and value sales fall, though sweet potatoes holds strong

French consumers still prefer fresh potatoes, but new, minimally processed option is attracting attention

WHAT'S NEXT?

Sweet potatoes will continue to drive overall category growth

Export likely to become increasingly attractive to local producers

[Summary 8 - Major Processors of Starchy Roots 2025](#)

CATEGORY DATA

- Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2020-2025
- Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2020-2025
- Table 95 - Retail Sales of Starchy Roots by Category: Volume 2020-2025
- Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2020-2025
- Table 97 - Retail Sales of Starchy Roots by Category: Value 2020-2025
- Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2020-2025
- Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2020-2025
- Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2025-2030
- Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2025-2030
- Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2025-2030
- Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2025-2030
- Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2025-2030
- Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sugar and Sweeteners in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Health concerns keep growth subdued

INDUSTRY PERFORMANCE

Sugar and sweeteners sees low growth in 2025

Brands invest in diversity, with France still a major sugar producer

WHAT'S NEXT?

Health trends will continue to curb category expansion

Sharpened focus on natural sweeteners

Summary 9 - Major Processors of Sugar and Sweeteners 2025

CATEGORY DATA

Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2020-2025

Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2020-2025

Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2020-2025

Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2020-2025

Table 110 - Retail Sales of Sugar and Sweeteners: Value 2020-2025

Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2020-2025

Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2020-2025

Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2025-2030

Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2025-2030

Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2025-2030

Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2025-2030

Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2025-2030

Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Vegetables in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Value focus lifts tomatoes while convenience pressures fresh demand

INDUSTRY PERFORMANCE

Vegetables sees low growth, with progress driven by tomatoes

Tinned and frozen alternative present significant competitive threat to fresh vegetables

WHAT'S NEXT?

Consumption will rise steadily, ensuring sustained growth for vegetables

Sustainability and health trends continue to impact development

Summary 10 - Major Processors of Vegetables 2025

CATEGORY DATA

Table 119 - Total Sales of Vegetables by Category: Total Volume 2020-2025

Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2020-2025

Table 121 - Retail Sales of Vegetables by Category: Volume 2020-2025

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2020-2025

Table 123 - Retail Sales of Vegetables by Category: Value 2020-2025

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2020-2025

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2020-2025

Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2025-2030

Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2025-2030

Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2025-2030

Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2025-2030

Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2025-2030

Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/fresh-food-in-france/report.