



Processed Meat, Seafood and Alternatives To Meat in France

November 2025

KEY DATA FINDINGS

2025 DEVELOPMENTS

Flexitarian diet trends shapes sales

INDUSTRY PERFORMANCE

Falling prices boost demand for chilled red meat

Strong growth for tofu and derivatives

WHAT'S NEXT?

Consumers aiming to eat less meat

Further room for the development of tofu

Growing focus on animal welfare

COMPETITIVE LANDSCAPE

Fleury Michon leads, while Bonduelle sees strong growth with meat substitutes

Focus on protein

CHANNELS

Hypermarkets, supermarkets and discounters all have significant presence

E-commerce grows but remains small

CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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Staple Foods in France - Industry Overview

EXECUTIVE SUMMARY

Stabilising prices boost demand but soften current value growth

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Growing influence of health and wellness trend

Increasing emphasis on natural products and sustainability

WHAT'S NEXT?

Health consciousness and innovation to influence category development

Rise in environmental concerns

Growing interest in international culinary traditions amongst younger consumers

COMPETITIVE LANDSCAPE

Retailers hold leading positions

Shift in meat consumption

CHANNELS

Bakeries underpin strength of food/drink/tobacco specialists

Shifts in competitive landscape of retailing

Continued e-commerce growth

MARKET DATA

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Table 25 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

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