

France plant-based food retail market insights

2020-2022



Executive Summary

Retail sales data from NielsenIQ covering 13 European countries shows that sales of plant-based foods have grown 6% in 2022 – and 21% since 2020 – to reach €5.8 billion.

The global shift towards plant-based diets has sparked a revolution in the food industry, with major food manufacturers and retailers embracing the change. In Europe, plant-based food retail sales have surged in recent years as new products and innovations have come to market, enabling more consumers to purchase next-generation plant-based meat, seafood, eggs and dairy that are competitive with animal products on taste, price and convenience.

Plant-based foods in Europe are a €5.8 billion market.

The Good Food Institute Europe analysed NielsenIQ plant-based data for 13 European countries – Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, and the UK – to calculate the size and growth of the plant-based food retail market from 2020 to 2022.

€5.8 billion	+6%	+4%	21%
The retail market for plant-based foods is worth €5.8 billion, up from €4.8 billion in 2020.	The value of plant-based food sales grew by 6% between 2021 and 2022.	Plant-based food unit sales grew by 4% between 2021 and 2022.	Plant-based food euro sales and unit sales grew by 21% between 2020 and 2022.

To contextualise the sales performance of plant-based categories in 2022, it is important to note the unique macroeconomic environment that was present due to the ongoing war in Ukraine, global trade tensions, and inflation. While the growth of the plant-based food retail market decelerated in 2022 compared to 2021, sales continued to grow in terms of both value and units, demonstrating strong demand from consumers for these products despite these challenges.

Overview of Europe-wide plant-based category sales summary, 2022

	2022 sales value	2021-2022 sales growth	2020-2022 sales growth	2022 unit sales	2021-2022 unit sales growth	2020-2022 unit sales growth
Milk	€2.2 B	7%	19%	1.3 B	6%	20%
Meat	€2.0 B	3%	19%	846 M	1%	21%
Yoghurt	€515 M	-0.4%	8%	255 M	-3%	10%
Spreads	€247 M	13%	40%	140 M	4%	26%
Meals	€181 M	20%	79%	72 M	14%	71%
Ice cream	€174 M	8%	14%	57 M	8%	15%
Cheese	€165 M	4%	56%	61 M	4%	62%
Cream	€139 M	7%	7%	109 M	0%	1%
Dessert	€88 M	6%	27%	58 M	5%	40%
Seafood	€43 M	60%	326%	14 M	67%	343%
Total	€5.8 B	6%	21%	2.9 B	4%	21%

Plant-based foods in France are a €425.7 million market.

The French plant-based food retail market is the fifth largest market in Europe, and sales continue to grow – increasing by 5% to €425.7 million between 2020 and 2022.

Plant-based milk is France's most developed category, although sales have stayed steady since 2020. Plant-based meat sales continue to increase in value, growing by 17% between 2020 and 2022. One of the least developed categories, but the fastest growing, is plant-based cheese.

Dive into the report to better understand the French plant-based food retail market and how plant-based foods are growing in comparison to animal-based foods.

Addendum: In April 2023, we discovered some errors on the part of our data partner for the UK plant-based cheese, yoghurt, and dessert categories and the Poland plant-based cheese category. In this report, the executive summary, overall plant-based food country comparison charts, plant-based cheese country comparison charts, and plant-based yoghurt country comparison charts have been updated with the correct sales figures.

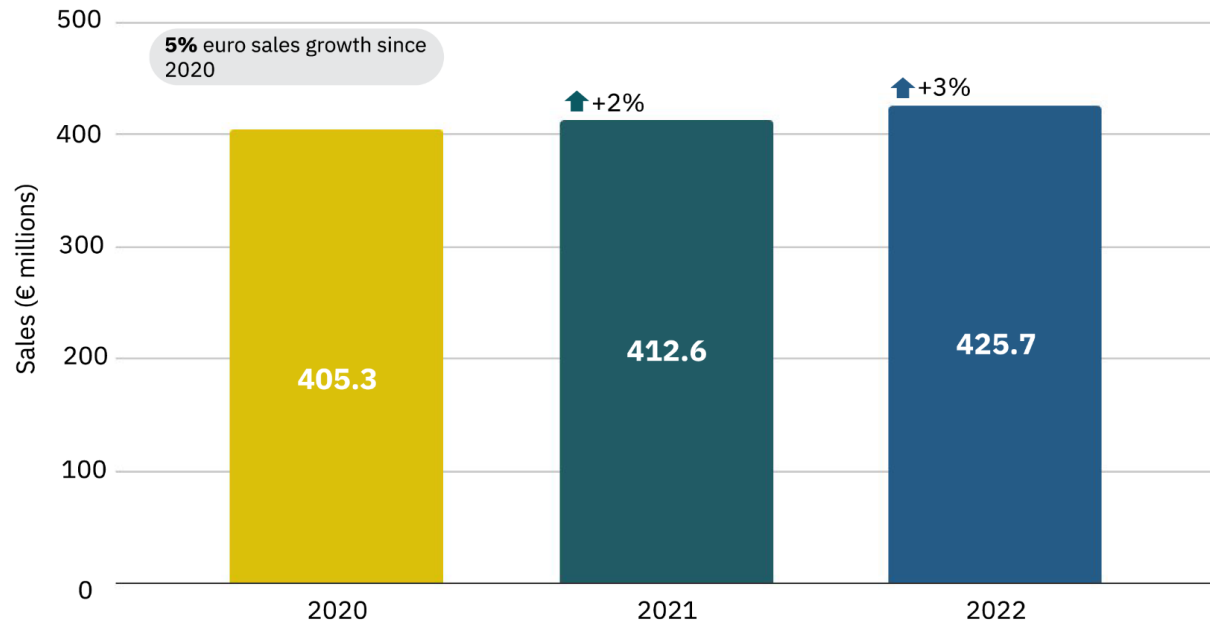
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Overall plant-based food market

Plant-based food sales in France grew by 3% in 2022 to €425.7 million.

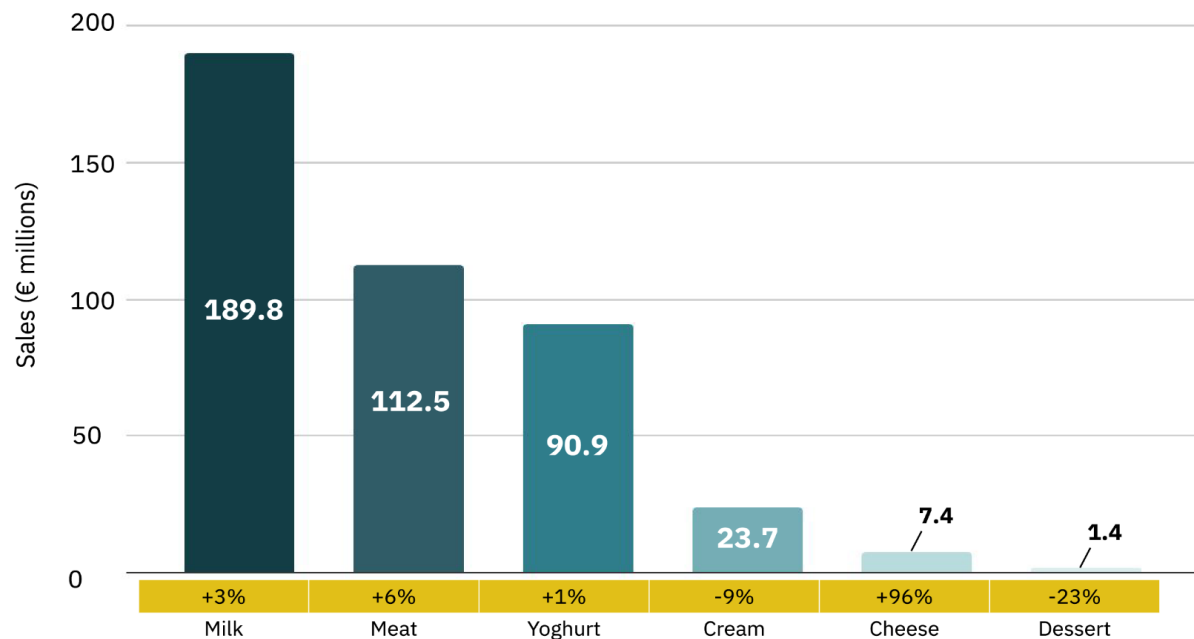
France plant-based foods sales (in € millions), 2020-2022



Categories

Plant-based categories are in various stages of development.

France plant-based foods sales by category (in € millions), 2022



Key insights:

- **Plant-based milk is the most developed of all plant-based categories**, with plant-based milk sales totalling €189.8 million in 2022.
- **Plant-based meat sales continued to increase**, growing by 17% between 2020 and 2022 to €112.5 million.
- **One of the least developed categories, but the fastest growing, is plant-based cheese.** At €7.4 million in sales in 2022, plant-based cheese is still a small category but growing rapidly, with more than 674% growth since 2020.

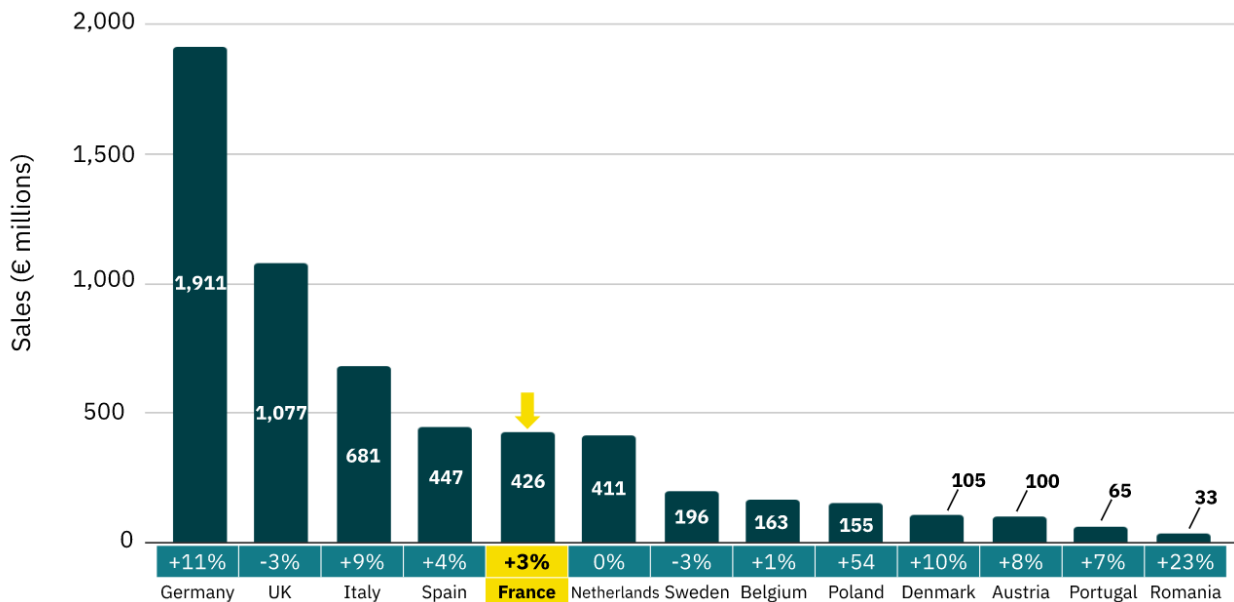
France plant-based category sales summary, 2022

	2022 euro sales	2021-2022 euro sales growth	2020-2022 euro sales growth	2022 unit sales	2021-2022 unit sales growth	2020-2022 unit sales growth
Milk	€189.8 M	3%	-1%	96.3 M	-1%	-2%
Meat	€112.5 M	6%	17%	39.3 M	0.4%	11%
Yoghurt	€90.9 M	1%	5%	-	-	-
Cream	€23.7 M	-9%	-15%	14.6 M	-10%	-17%
Cheese	€7.4 M	96%	674%	2.8 M	94%	742%
Dessert	€1.4 M	-23%	-37%	1 M	-24%	-38%
Total	€425.7 M	3%	5%	154 M	-0.7%	0.4%

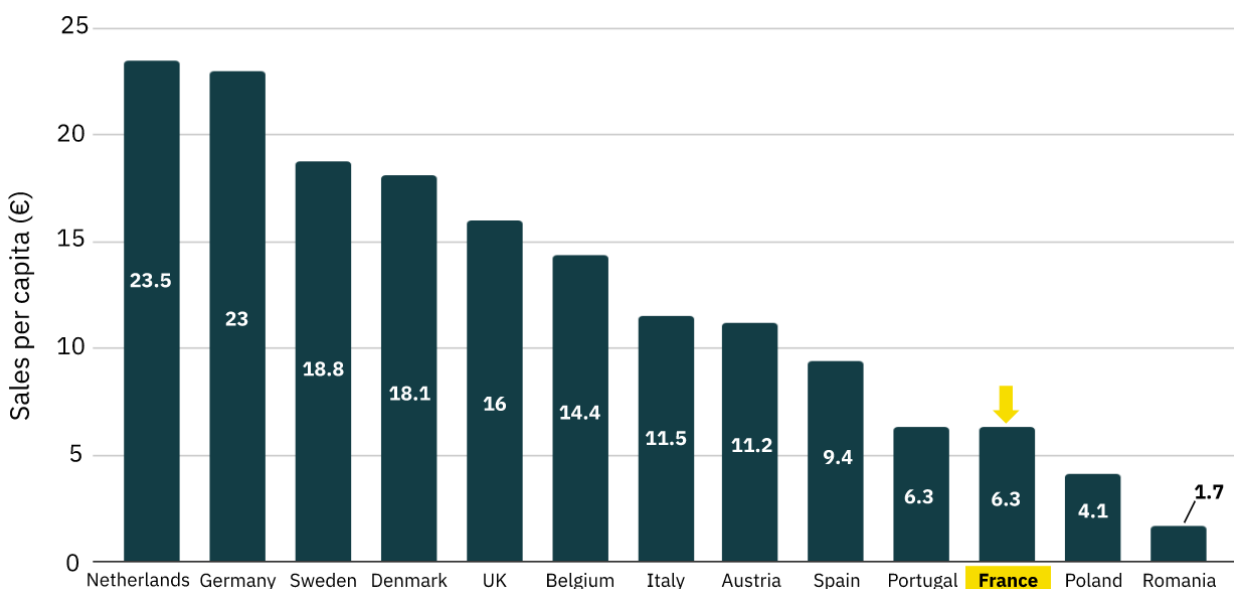
Country comparison

France has the fifth highest plant-based food euro sales in Europe but ranks 11th in terms of average plant-based food euro spend per capita.

Europe-wide plant-based food sales by country (in € millions), 2022

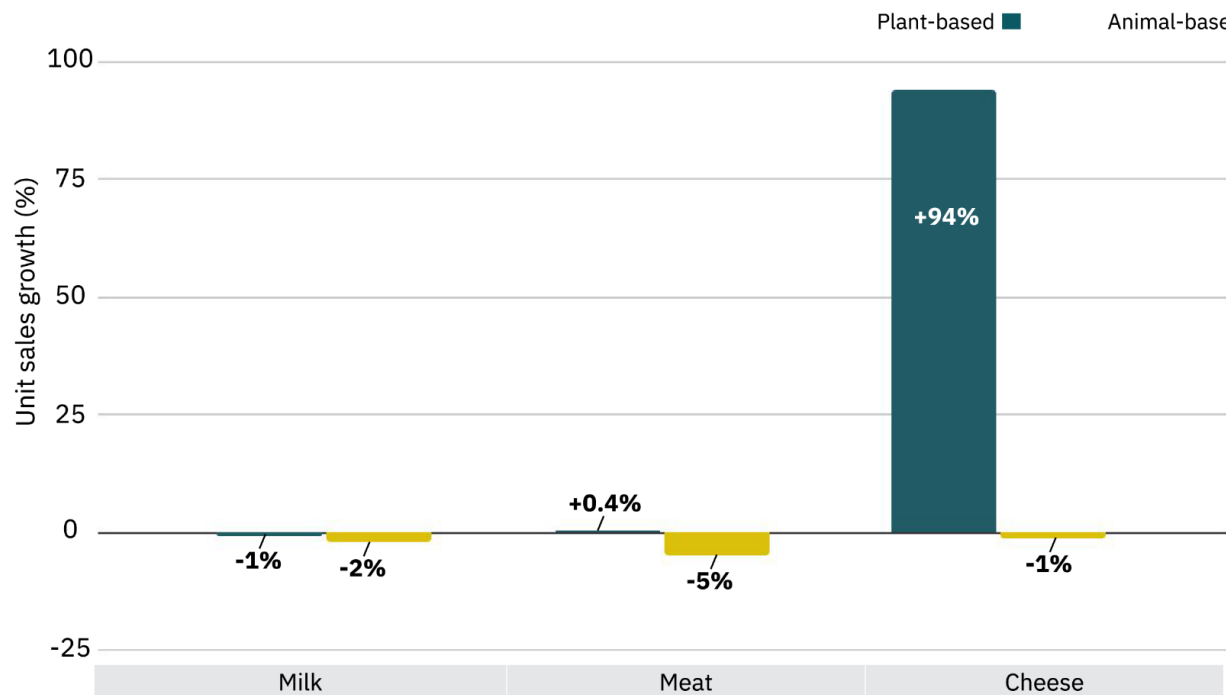


Europe-wide average plant-based food spend per country per capita (in euros), 2022



Comparison to animal-based foods

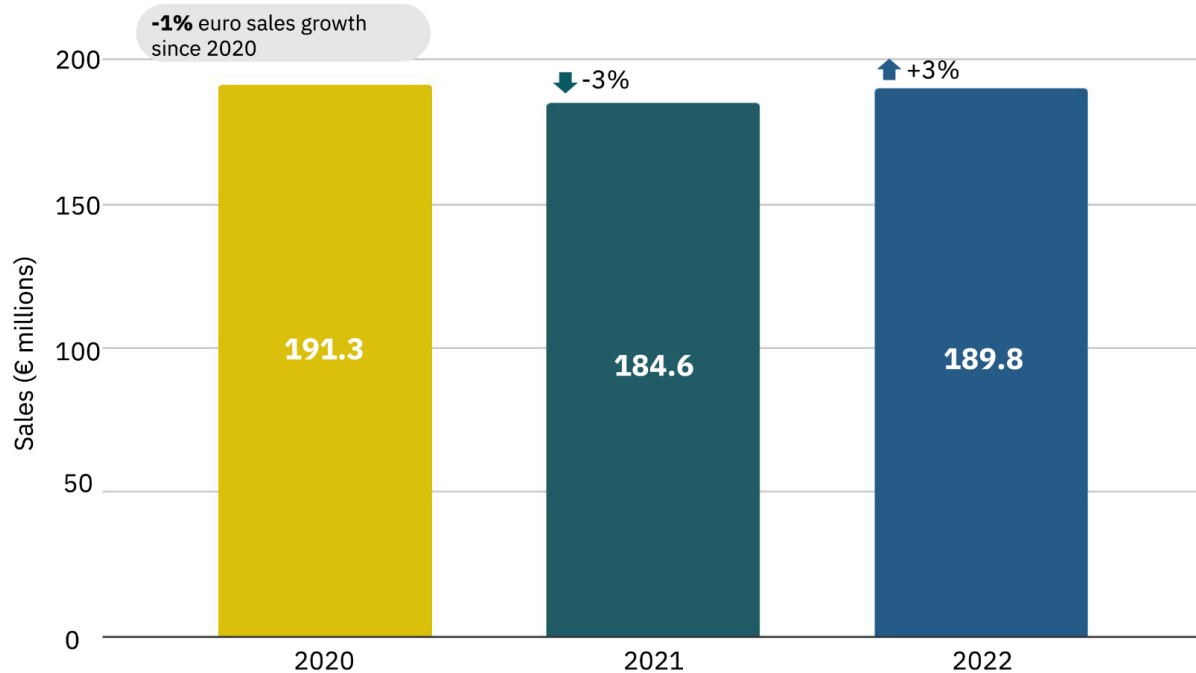
France plant-based vs animal-based category unit sales growth, 2022



To compare the growth of plant-based versus animal-based categories, we compared unit sales (instead of sales by value) as it provides a more direct comparison. In 2022, unit sales growth of plant-based cheese significantly outpaced animal-based cheese, and plant-based milk and meat moderately outpaced that of animal-based categories.

Plant-based meat¹

France plant-based meat sales (in € millions), 2020-2022



Key insights:

- The value of plant-based meat sales increased by 17% between 2020 and 2022, while unit sales increased by 11%.
- In comparison, pre-packaged conventional meat unit sales decreased by 9% between 2020 and 2022.
- The average price per unit of plant-based and pre-packaged conventional meat in 2022 increased by 5% and 12% respectively.
- In 2022, plant-based meat had a 2% market share of the total retail pre-packaged meat category.²

Segment insights:

- Refrigerated plant-based meat makes up the majority of the category by sales value in 2022, representing 88% of total plant-based meat sales, whereas shelf-stable and frozen plant-based meat make up 9% and 3% respectively.

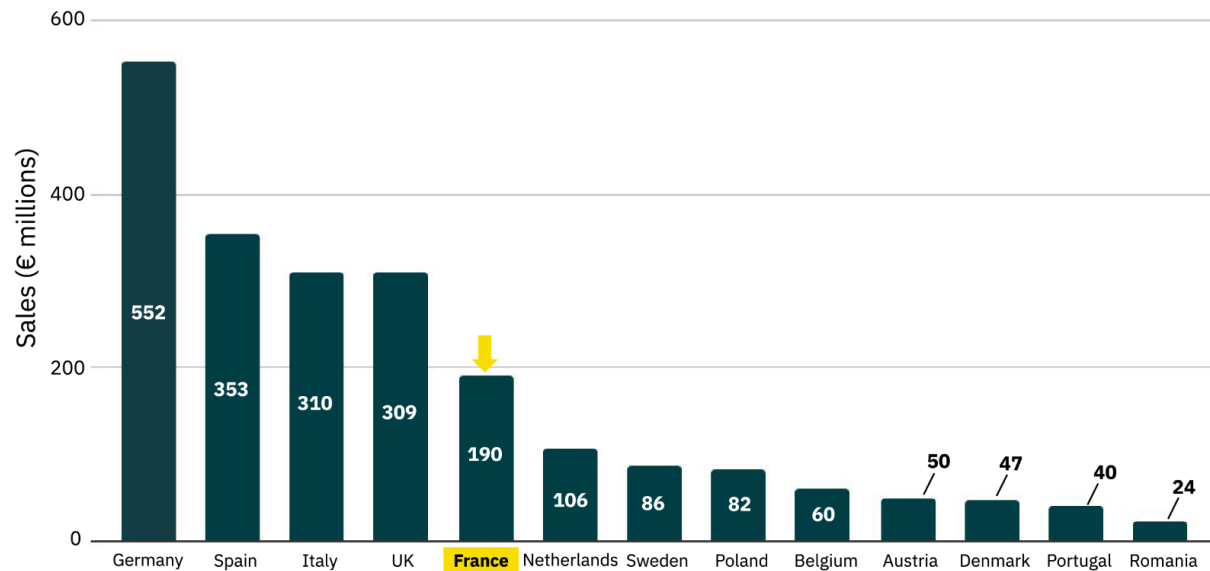
¹ The plant-based meat category includes both analogues (products that mimic the appearance and taste of animal-based meat) and non-analogues (e.g. vegetable-based patties).

² Nielsen only reports on pre-packaged animal-based meat sales, therefore the market share calculation is only for the pre-packaged meat category.

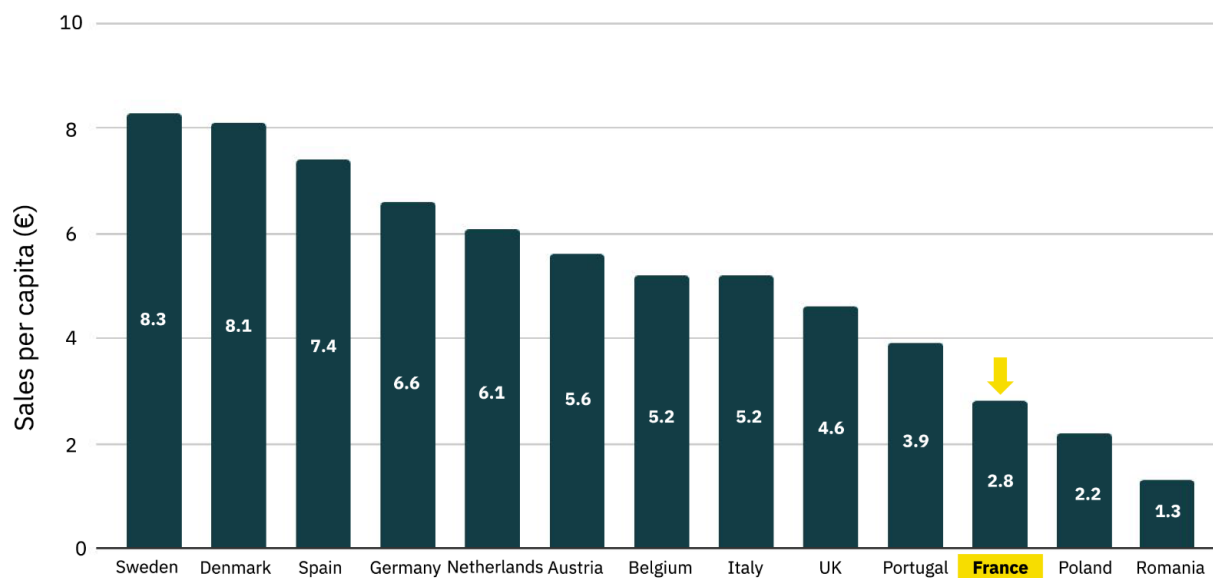
Country comparison

France has the fifth highest plant-based meat sales value in Europe but ranks 10th in terms of average plant-based meat spend per capita.

Europe-wide plant-based meat sales per country (in € millions), 2022

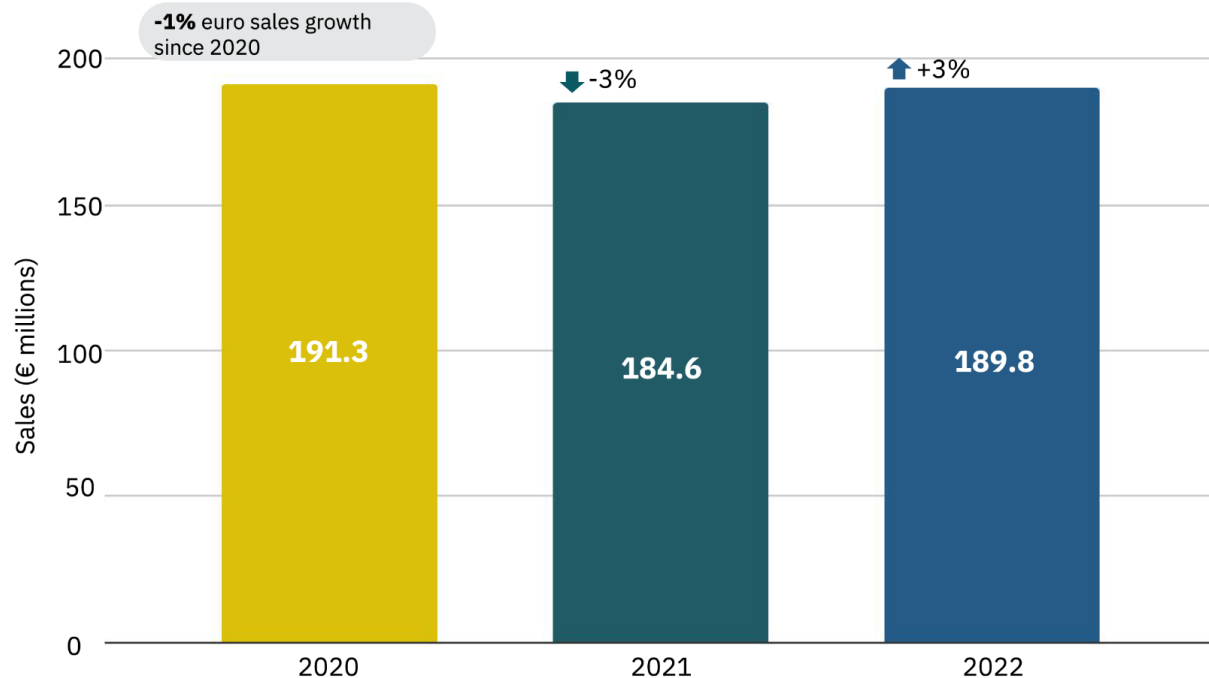


Europe-wide average plant-based meat spend per country per capita (in euros), 2022



Plant-based milk

France plant-based milk sales (in € millions), 2020-2022



Key insights:

- The value of plant-based milk sales decreased by 1% between 2020 and 2022, while total unit sales decreased by 2%.
- Conventional milk unit sales also decreased by 2% between 2020 and 2022.
- The average price per unit of plant-based and conventional milk in 2022 increased by 4% and 6% respectively.
- In 2022, plant-based milk had a 10% market share of the total milk category.

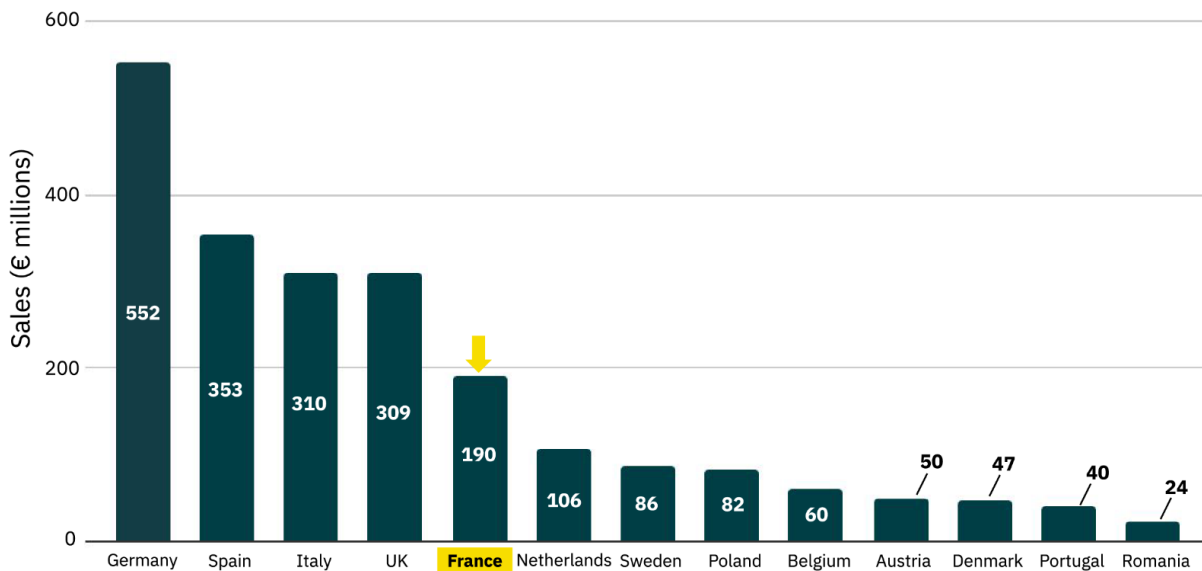
Segment insights:

- Almond milk is the category leader with 35% of category sales by value in 2022, followed by soy milk (19%) and oat milk (17%).
- However, oat milk is also the only segment experiencing growth (39%), whereas the value of both almond and soy milk sales declined (-10% and -12%).

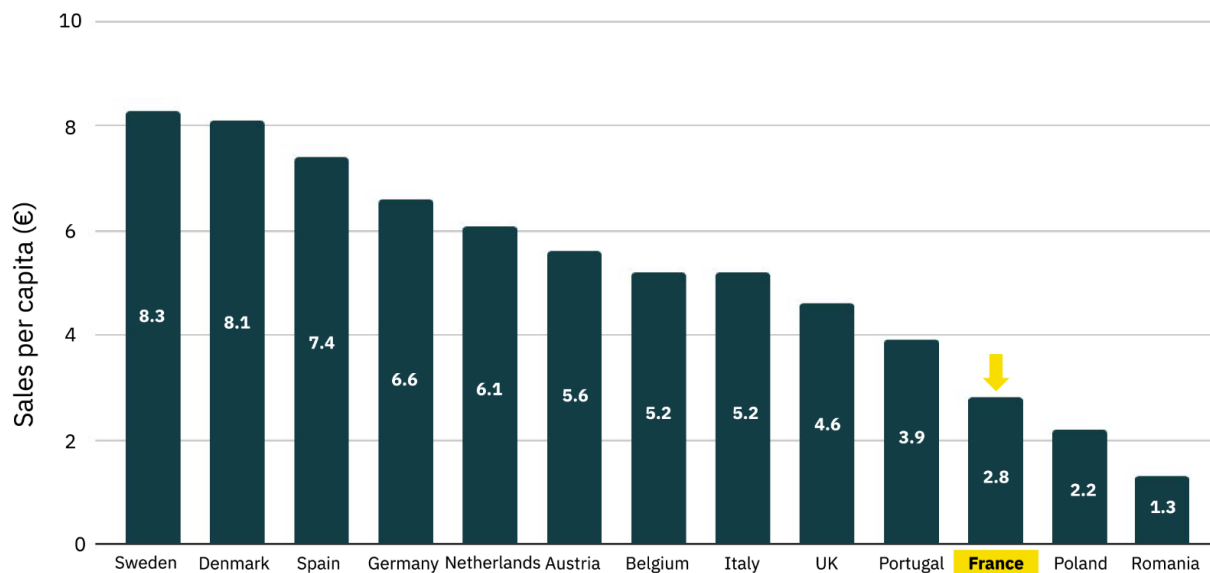
Country comparison

France has the fifth highest plant-based milk sales value in Europe but ranks 11th in terms of average plant-based milk spend per capita.

Europe-wide plant-based milk sales per country (in € millions), 2022

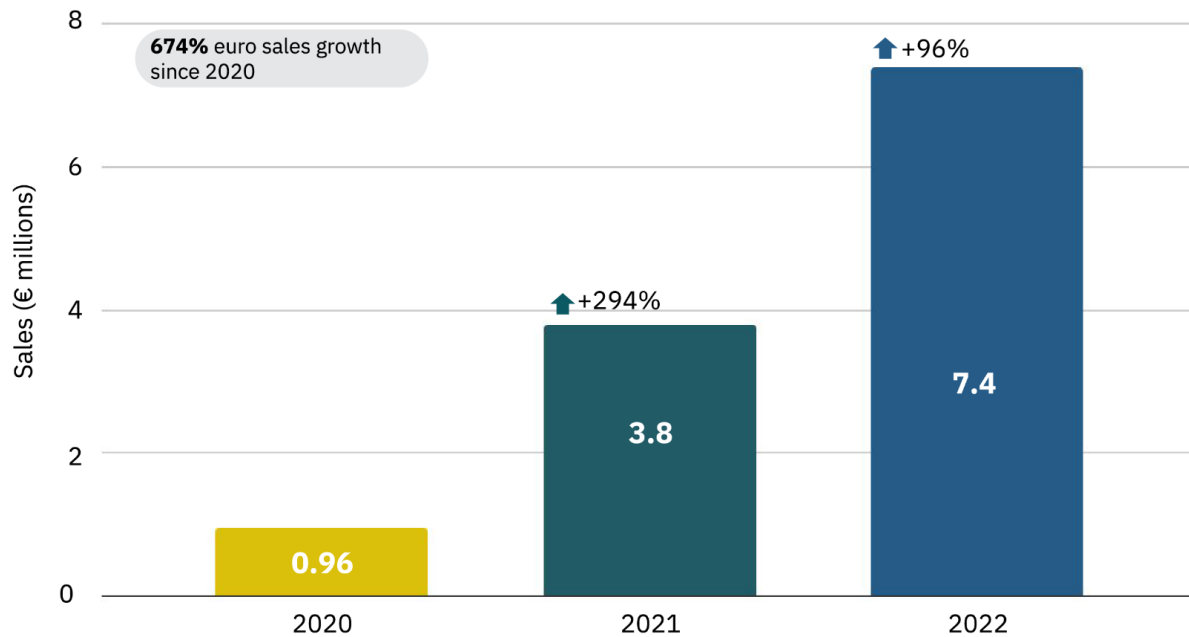


Europe-wide average plant-based milk spend per country per capita (in euros), 2022



Plant-based cheese

France plant-based cheese sales (in millions) 2020-2022



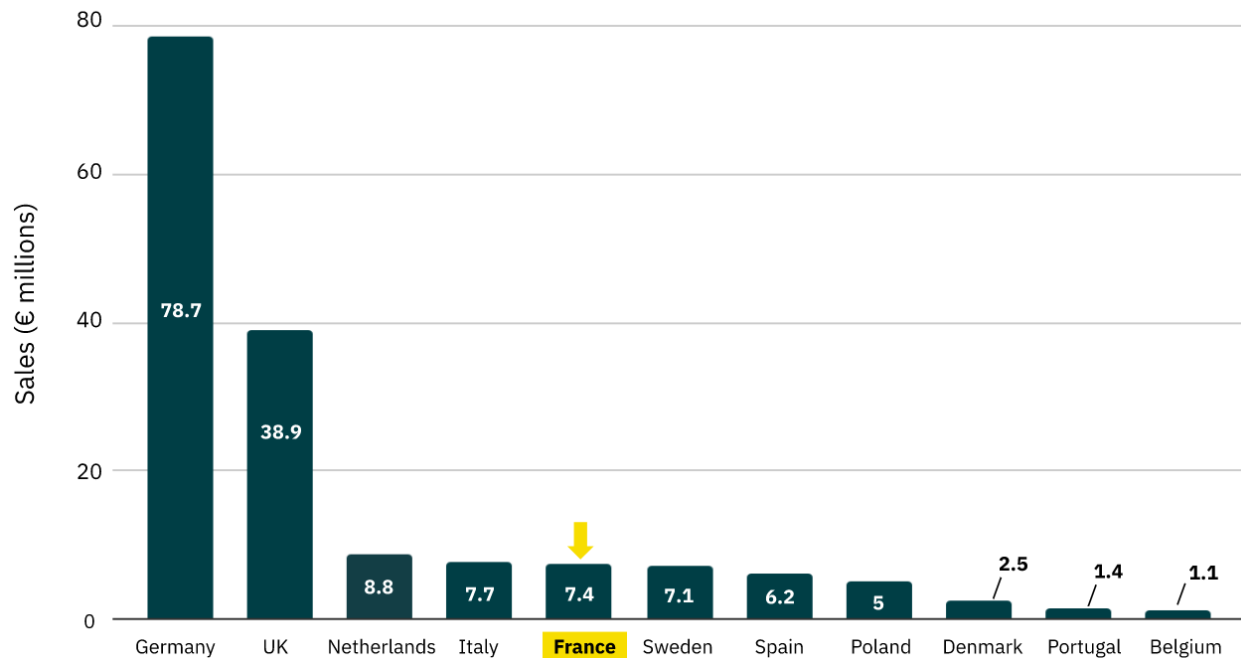
Key insights:

- The value of plant-based cheese sales grew by 674% between 2020 and 2022, and unit sales increased by 742%.
- In comparison, conventional cheese unit sales actually decreased by 5%.
- In terms of average price per unit, the plant-based cheese category has been less impacted by inflation and price increases in 2022. Plant-based cheese prices increased by 1%, whereas conventional cheese prices increased by 7%.
- In 2022, plant-based cheese had a 0.1% market share of the total cheese category.

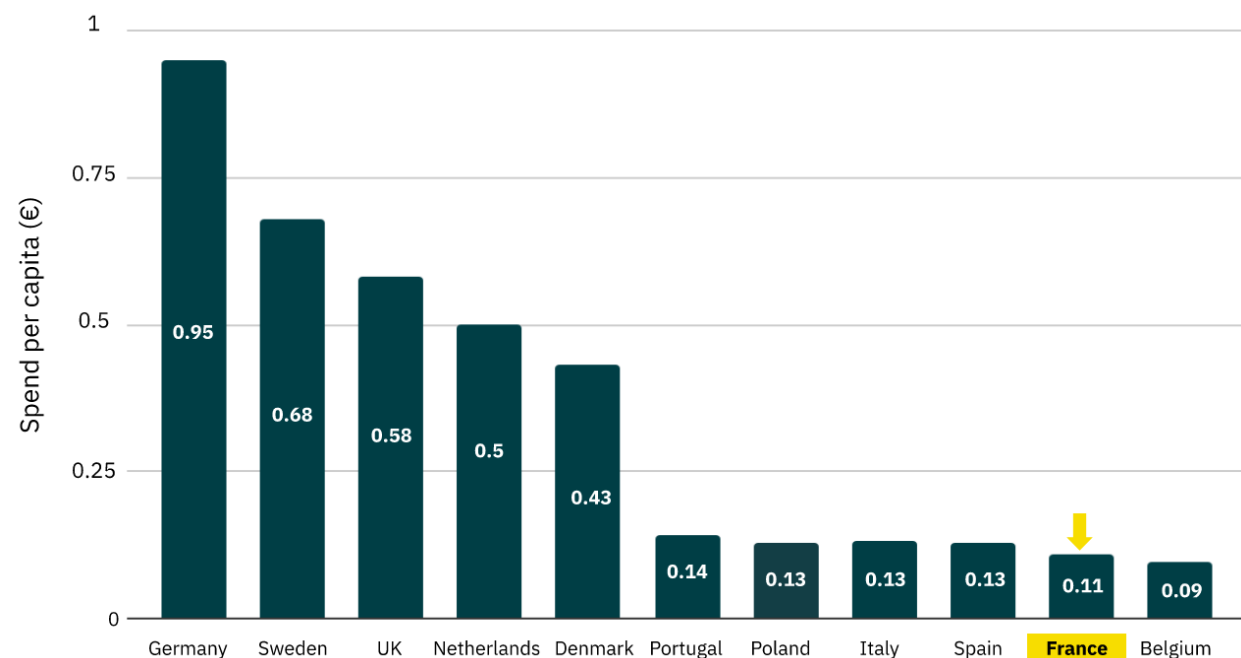
Country comparison

France ranks fifth for plant-based cheese sales value in Europe but tenth in terms of average plant-based cheese spend per capita.

Plant-based cheese sales per country (in € millions), 2022

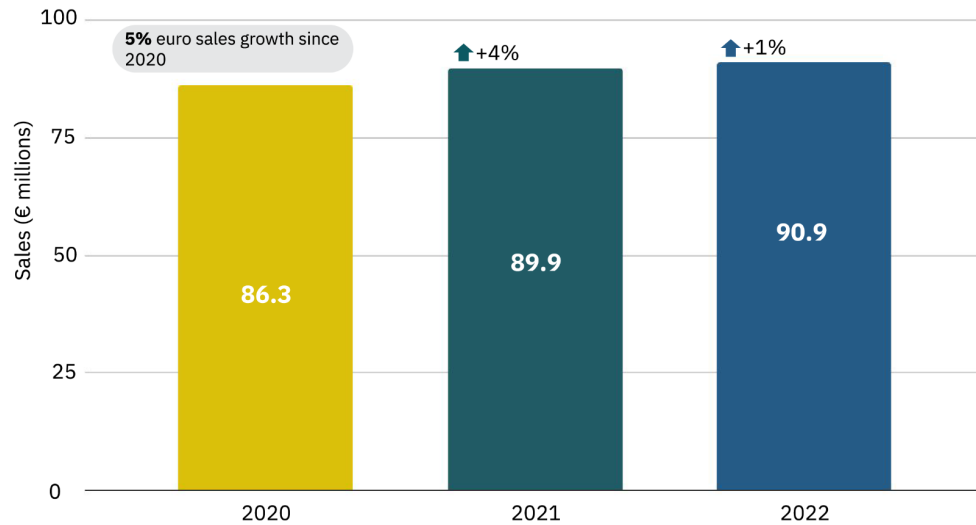


Average plant-based cheese spend per country per capita (in euros), 2022



Plant-based yoghurt³

France plant-based yoghurt sales (in millions) 2020-2022



Key insights:

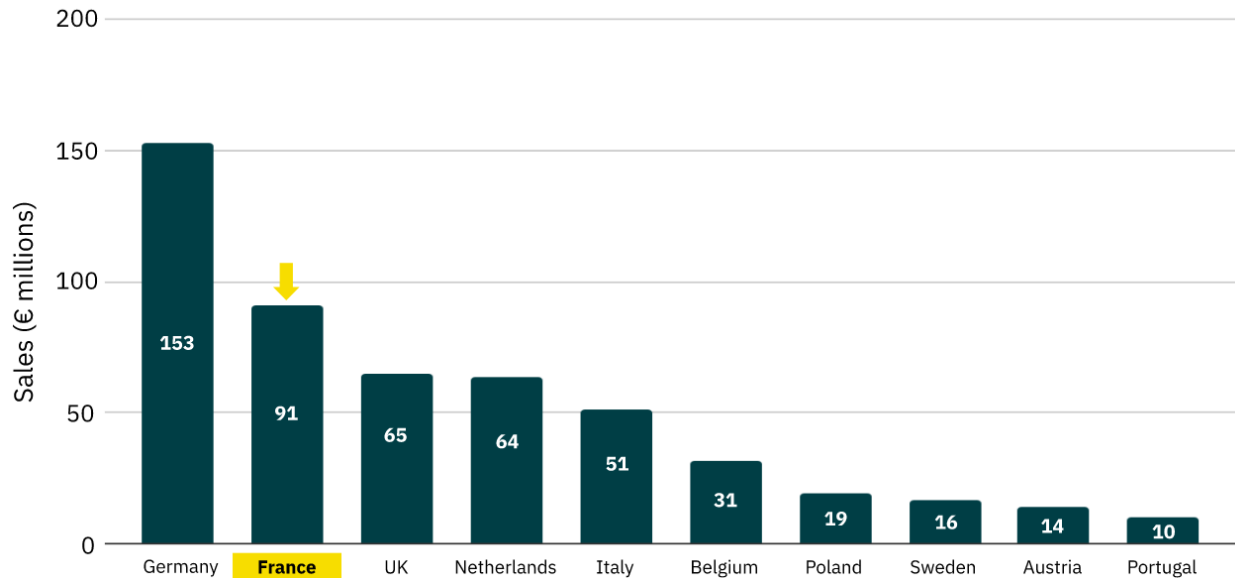
- The value of plant-based yoghurt sales grew 5% between 2020 and 2022.
- In 2022, plant-based yoghurt had a 5% market share of the total yoghurt category.

³ There is no unit sales information available for plant-based yoghurt.

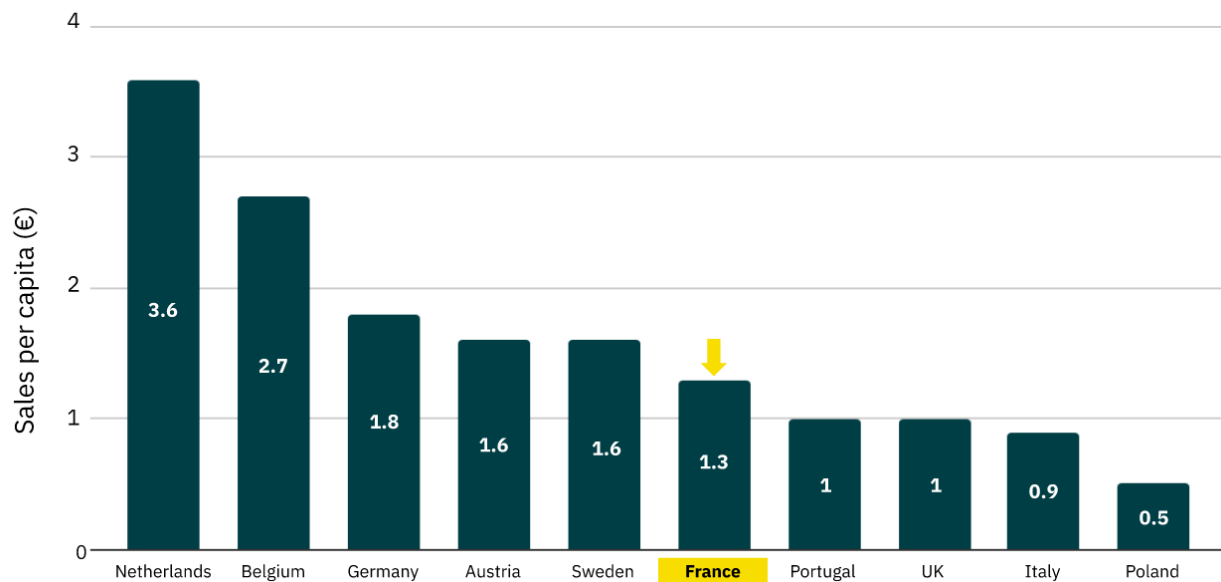
Country comparison

France ranks second in plant-based yoghurt sales value in Europe but sixth in average plant-based yoghurt spend per capita.

Plant-based yoghurt sales per country (in € millions), 2022

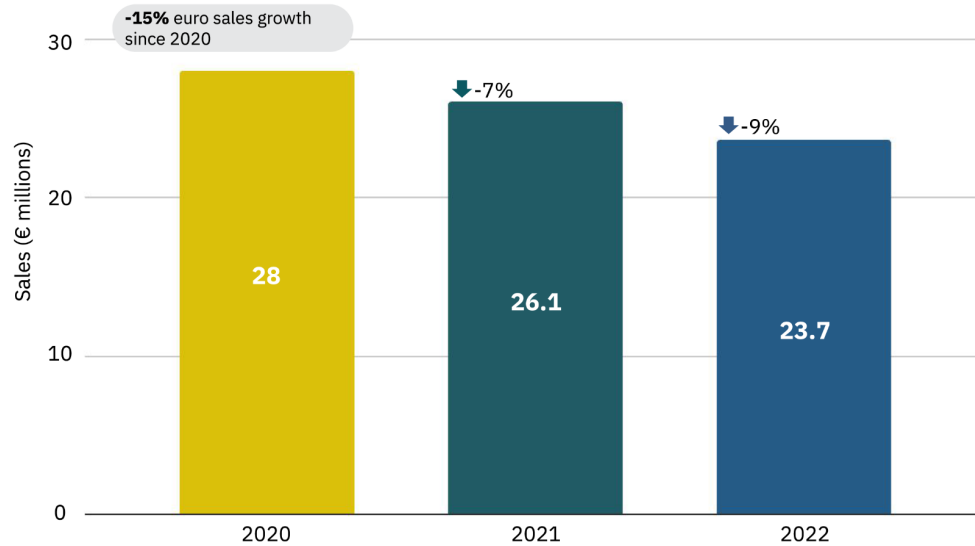


Average plant-based yoghurt spend per country per capita (in euros), 2022



Plant-based cream

France plant-based cream sales (in € millions), 2020-2022

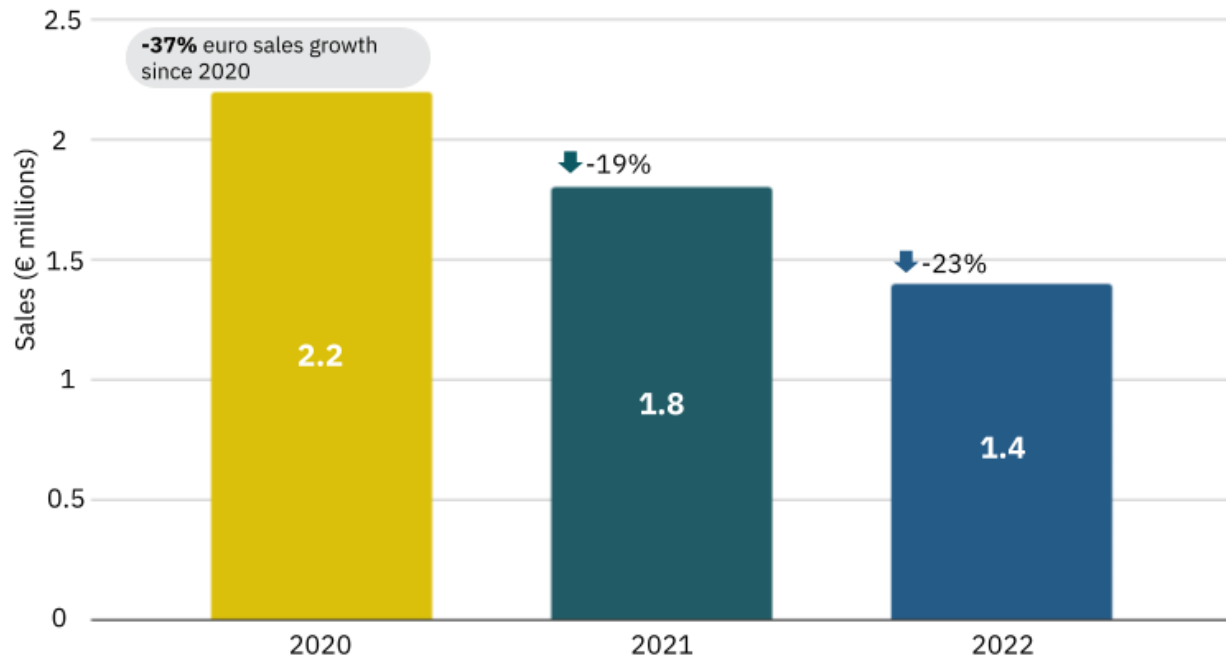


Key insights:

- The value of plant-based cream sales decreased by 15% between 2020 and 2022.
- Plant-based cream unit sales decreased by 17% between 2020 and 2022.
- The average price per unit of plant-based cream in 2022 increased by 1%.

Plant-based dessert⁴

France plant-based dessert sales (in € millions), 2020-2022



Key insights:

- The value of plant-based dessert sales decreased by 37% between 2020 and 2022.
- Plant-based dessert unit sales decreased by 38% between 2020 and 2022.
- The average price per plant-based dessert unit increased by 2% in 2022.

⁴ The plant-based dessert category is primarily made up of pudding.

Closing remarks

“The plant-based food retail market in Europe has seen significant growth in recent years, driven by better plant-based products being brought to market. This is encouraging as the world works to address the many problems caused by industrial animal agriculture. However, to sustain this growth, companies must continue investing in product innovation to develop plant-based products that meet consumer expectations when it comes to the key drivers of taste, price, and convenience. The Good Food Institute’s [Advancing Solutions for Alternative Proteins database](#) is a great source to better understand key innovation priorities.”

Carlotte Lucas,
*Senior Corporate Engagement Manager at
the Good Food Institute Europe*



About the data

To size the French retail market for plant-based foods, GFI Europe commissioned retail sales data from market research firm NielsenIQ. Analysis in this report is based on data reported by NielsenIQ for the total plant-based, total dairy products, and total pre-packed meat categories for the 52-week, 104-week, and 156-week periods ending 31 December 2022, for the France market, according to GFI Europe product hierarchy. Therefore the data presented in this report may not align with standard NielsenIQ categories. Copyright © 2022, Nielsen Consumer, LLC.

About the Good Food Institute Europe

[The Good Food Institute Europe](#) is an international NGO helping to build a more sustainable, secure and just food system by transforming meat production.

We work with scientists, businesses and policymakers to advance plant-based and cultivated meat – making them delicious, affordable and accessible across Europe.

By making meat from plants and cultivating it from cells, we can reduce the environmental impact of our food system and feed more people with fewer resources. GFI Europe is powered by philanthropy.

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