Alternative protein: Plant-based

Region: France

June 2025

2022 to 2024

France plant-based food retail market insights

Chilled meat, milk and drinks, cheese, yoghurt and cream.

Image credit: La Vie Foods

gfi / Europe

Executive summary

This report shows the trends in retail sales across five plant-based product categories (chilled meat, milk and drinks, cheese, yoghurt and cream) in France between 2022 and 2024, based on data from Circana.

The French retail market across **five categories** of plant-based food was valued at **€537 million in 2024**.	The total annual sales **value** of plant-based foods across five categories in France **grew by 20.5%** between 2022 and 2024.	Total annual sales **volume** across five categories of plant-based foods in France **grew by 7.5%** between 2022 and 2024.

The combined sales value across the five plant-based categories was €537 million in 2024 – 8.8% higher than in 2023 and 20.5% higher than in 2022, showing continued growth.

In contrast, most of the increase in unit sales and sales volume happened between 2023 and 2024. In 2024, 232 million units were sold (up 7.9% on 2023 and 9.9% on 2022), and sales volume stood at 147 million kg (an increase of 5.1% on 2023 and 7.5% on 2022).

French food inflation reached a historic peak of 15.9% in March 2023, before falling again. This explains why the relatively slow growth in unit sales and sales volume between 2022 and 2023 coincided with ongoing growth in sales value. As inflationary pressures eased, however, the growth in the quantity of plant-based food sold accelerated.

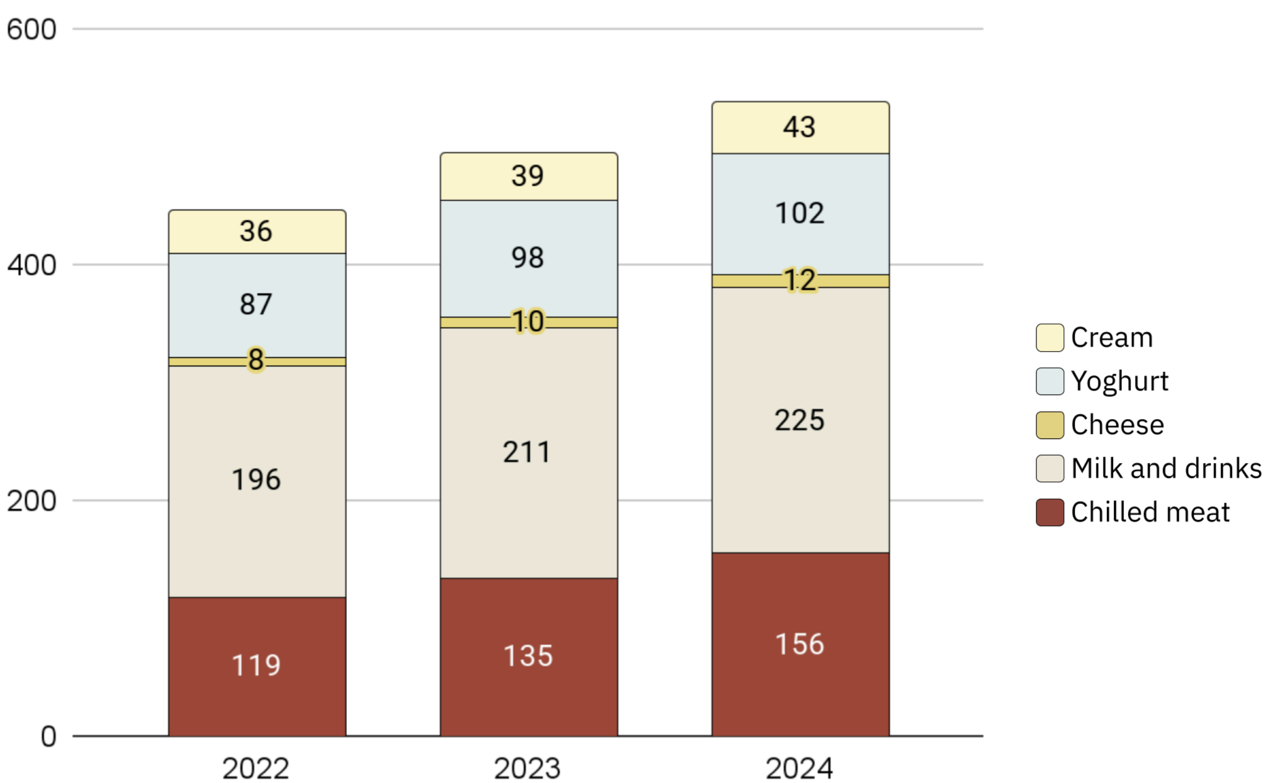
All five plant-based categories in this report grew in terms of sales value, unit sales and sales volume between 2023 and 2024, outperforming their animal-based equivalents in terms of percentage growth. Plant-based cheese is growing particularly rapidly, by 19.5% in sales volume between 2023 and 2024 – although it remains a small, emerging category.

Relatively affordable private-label products are becoming increasingly important in France's plant-based sector. However, they are losing market share in some product categories despite being cheaper per kg, suggesting that other factors, such as taste, are drawing consumers towards branded options.

Overview of plant-based food sales by category in France, 2022-2024

	Sales value			Unit sales			Sales volume		
	2024, € million	2023-24 change	2022-24 change	2024, million units	2023-24 change	2022-24 change	2024, million kg	2023-24 change	2022-24 change
Chilled meat	155.7	15.5%	31.1%	50.8	18.6%	20.8%	9.0	12.1%	12.9%
Milk and drinks	224.6	6.2%	14.6%	106.6	5.1%	7.6%	107.0	4.5%	7.3%
Cheese	12.0	18.6%	58.7%	4.4	20.5%	52.8%	0.7	19.5%	48.7%
Yoghurt	102.3	4.1%	17.3%	46.9	2.2%	2.4%	22.1	2.8%	4.0%
Cream	43.0	8.9%	17.7%	23.6	10.1%	9.3%	7.7	11.3%	12.9%
Total	**537.4**	**8.8%**	**20.5%**	**232.3**	**7.9%**	**9.9%**	**146.5**	**5.1%**	**7.5%**

Plant-based food sales value by category in France, 2022-2024 (€ millions)



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About the data

This report is based on sales data gathered by Circana from retailers in France. The data has been analysed by the Good Food Institute Europe.

The data for France covers retail sales in hypermarkets, supermarkets, e-commerce, convenience and discounter stores, with the exception of frozen animal-based meat, for which the data covers all of these channels except for discounter stores. It does not include food service sales, such as restaurants.

Data for 2022, 2023 and 2024 covers 52-week periods, with the exact dates depending on the product category.

Note that GFI Europe's publication *France plant-based food retail market insights: 2021 to 2023 with initial insights into the 2024 market*, which is also based on Circana data, **covered eight product categories (including ready meals, ice cream and desserts), whereas the current report covers only five product categories.** Furthermore, while that report covered both chilled and frozen plant-based meat, this report covers only chilled plant-based meat, due to changes in Circana's data coverage. Caution should therefore be taken when comparing sales totals from that report to figures from this report.

Note also that since a different data provider has been used, with different product category definitions and coverage, the numbers in this report are not directly comparable to those in GFI Europe's previous publication, Market insights on European plant-based sales 2020-2022.

Key terms

Plant-based: foods that are made from plants. Where data permits, we have focused specifically on plant-based products that aim to mimic the taste and texture of animal products. In some categories, non-analogue products such as those based on beans or lentils are also included because the data does not permit further subcategorisation.

Animal-based: food derived from animals, such as meat from pigs or milk from cows.

Plant-based meat: foods made from plants or fungi that are designed to be similar to animal-based meat in taste and texture. The Circana data for plant-based meat may include some products that are not direct substitutes for meat, such as bean burgers, because it was not possible to fully separate out these products. Plant-based meat products may contain small amounts of egg or dairy, but plant-based ingredients like soy or pea are the main protein sources. Plant-based meat does not include tofu, tempeh or seitan – these categories have been reported separately.

Plant-based milk and drinks: drinks made from plants such as soy or oat that are intended to mimic the taste and performance of animal-based dairy milk. The plant-based milk and drinks category includes plain and flavoured plant-based milks as well as some other drinks containing a dairy alternative component, such as coffee drinks. It does not include fruit juices or other drinks not designed to replicate dairy.

Market share: the proportion of all sales in a wider product category (comprising both plant-based and animal-based versions) that is plant-based. This is calculated by dividing plant-based sales by the sum of plant-based and animal-based sales. Market share can be calculated on the basis of sales volume or sales value. Note that in this report, market share is calculated based only on retail sales of pre-packaged products.

Private label: products that are sold under the label of a retailer, as opposed to branded products. Also known as supermarket own-brand products.

Sales value: the total value of sales measured in euros (€).

Sales volume: the total quantity of products sold measured in kilograms (kg) or litres (l), depending on the product category.

Unit sales: the total number of units of a product sold. A unit can refer to a pack, carton or tub, for instance.

Overall plant-based food market

Total French plant-based market

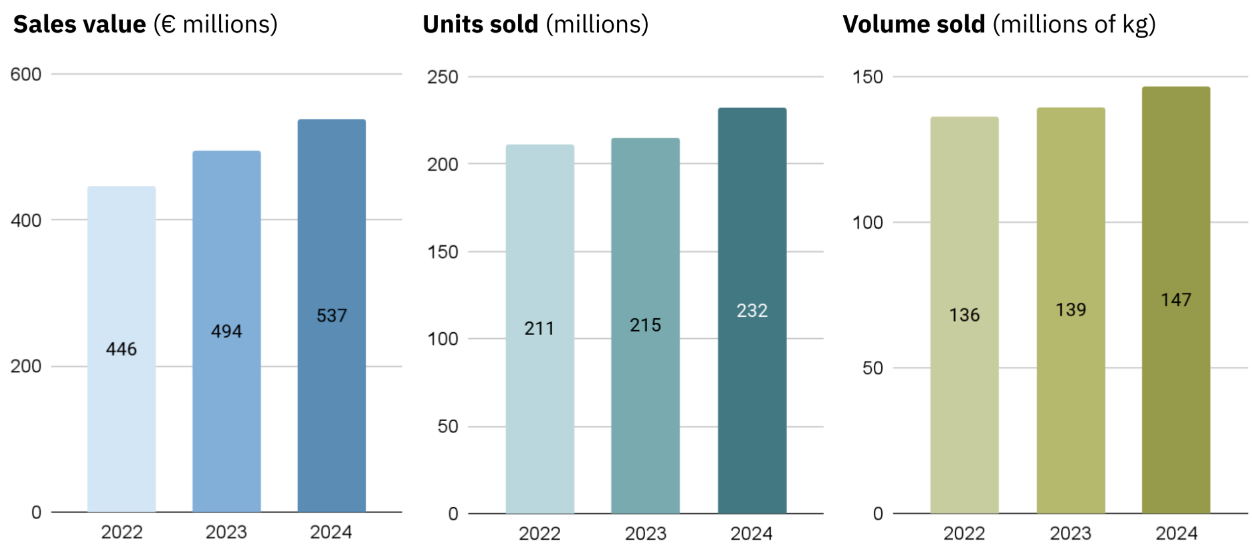
France’s plant-based market is growing at a moderate pace, with quantities sold increasing as inflation in the wider food sector has fallen.

Between 2022 and 2024, total annual sales value across five plant-based categories[1] (chilled meat, milk and drinks, cheese, yoghurt and cream) rose by 20.5%, reaching €537 million. Over the same time period, unit sales rose by 9.9% to 232 million units, and sales volume rose by 7.5% to 147 million kg.

The year-on-year percentage increase in sales value has slowed slightly, with a 10.8% increase between 2022 and 2023 followed by an 8.7% increase between 2023 and 2024. In contrast, unit sales and sales volume have accelerated: most of the growth occurred between 2023 and 2024 (7.9% for unit sales and 5.1% for sales volume).

This shows that the increase in sales value between 2022 and 2023 was driven partly by inflation, whereas the rise from 2023 to 2024 reflects an increase in demand.

Plant-based food sales across five categories in France, 2022-2024



[1] Note that last year’s publication covered eight product categories (including ready meals, ice cream and desserts), whereas the current report only covers five product categories. Furthermore, while that report covered both chilled and frozen plant-based meat, this report covers only chilled plant-based meat, due to changes in Circana’s data coverage. Caution should therefore be taken when comparing sales totals from that report to figures from this report.

Categories

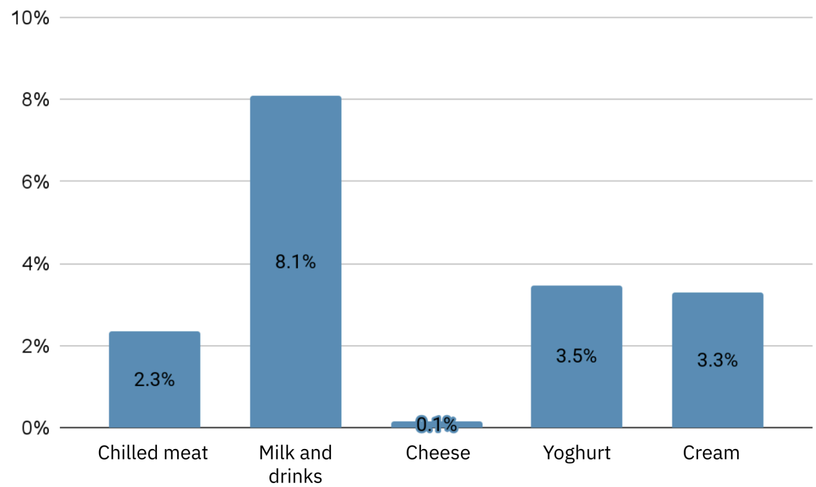
Plant-based milk and drinks is the largest plant-based category in France, accounting for 42% of sales value in 2024. It is followed by plant-based meat (29%) and plant-based yoghurt (19%).

Plant-based milk and drinks is also the most well-established product category in terms of market share relative to its animal-based equivalent, reaching 8.1% of sales value and 4.9% of sales volume in 2024.

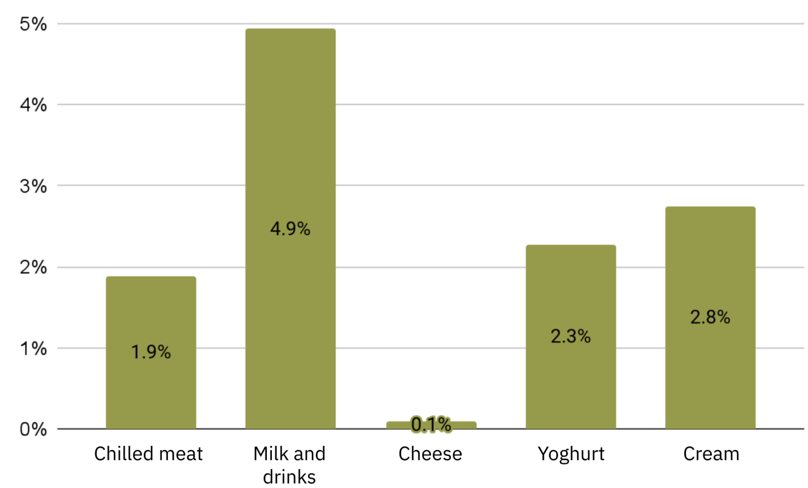
Plant-based meat, yoghurt and cream have reached small but steady or growing levels of market share.

Plant-based cheese is the smallest plant-based category covered in this report, with the lowest market share. However, it is also the most rapidly growing category, up 18.6% in annual sales value between 2023 and 2024.

Plant-based food: share of France's total pre-packaged (plant- and animal-based) sales for each category, 2024 (% of sales value)

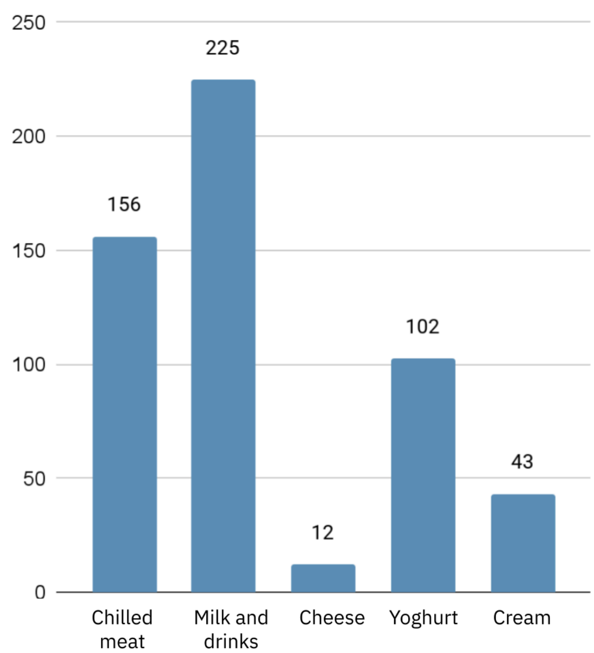


Plant-based food: share of France's total pre-packaged (plant- and animal-based) sales for each category, 2024 (% of sales volume)

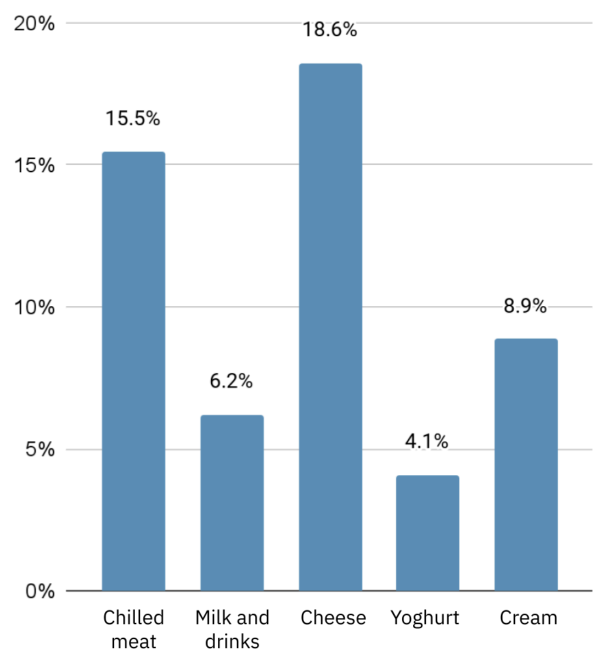


All plant-based categories in this report saw growth across sales value, unit sales and sales volume between 2023 and 2024. The fastest growing plant-based categories in terms of sales value, after cheese, are meat (up 15.5%) and cream (up 8.9%).

Plant-based food sales value by category in France, 2024 (€ millions)



Change in the sales value of plant-based foods in France, 2023-2024 (%)



Branded versus private label

Private-label products, ie, those sold by a retailer under their own brand, play an increasingly important role in the French plant-based market.

While the sales volume of branded products dipped slightly in 2023 before growing by 2.3% between 2023 and 2024, the sales volume of private-label products in 2024 was 8.9% higher than in 2023 and 21.6% higher than in 2022.

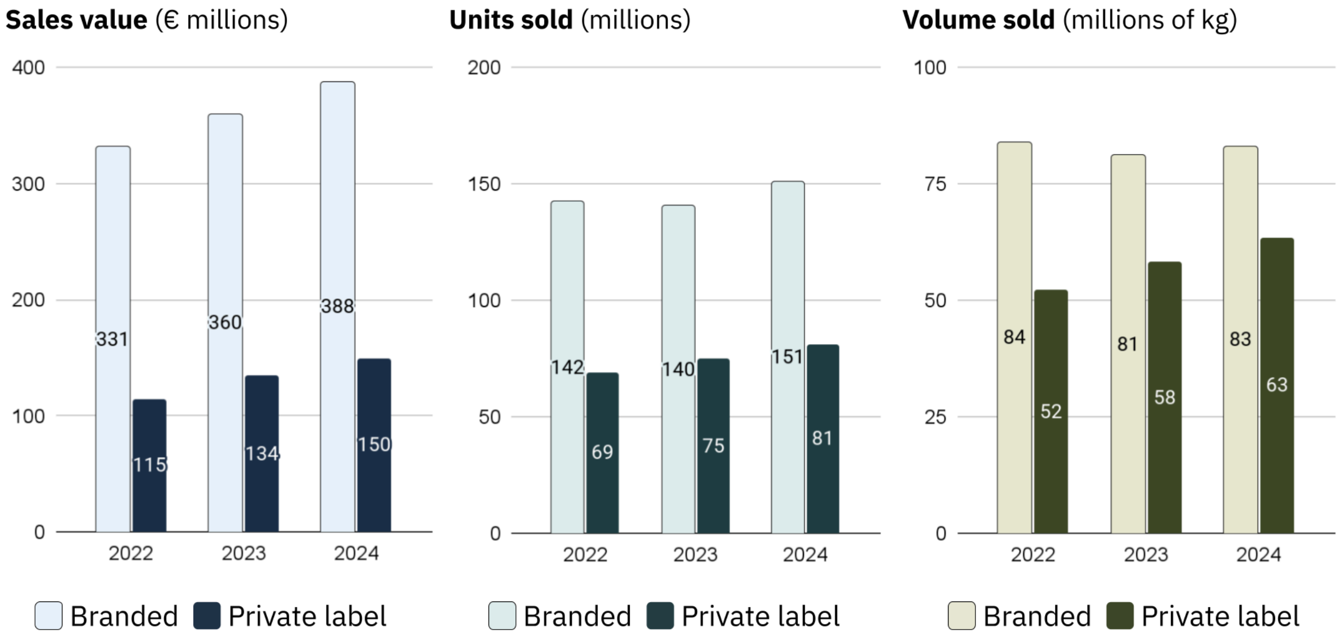
Private-label products are generally cheaper than their branded equivalents, as reflected in their relatively low share of overall sales value compared to their share of sales volume. The price difference varies by product category, being particularly wide for plant-based cream and narrower for plant-based cheese and yoghurt.

Although the affordability of private-label products may attract some consumers, they are losing market share in some plant-based categories, specifically meat and yoghurt. This shows that price is not the only factor influencing consumer choice. Particularly as inflationary pressures on consumer budgets have lifted slightly, the trends in this report suggest that many consumers are more likely to be driven by other factors such as taste, often choosing branded products despite their premium pricing.

Plant-based sales and growth rates across five product categories in France, branded versus private label, 2022-2024

	Sales value			Unit sales			Sales volume		
	2024, € million	2023-24 change	2022-24 change	2024, million units	2023-24 change	2022-24 change	2024, million kg	2023-24 change	2022-24 change
Branded	388	7.8%	17.1%	151	7.7%	6.3%	83	2.3%	-1.2%
Private label	150	11.4%	30.4%	81	8.4%	17.4%	63	8.9%	21.6%

Plant-based food sales across five categories in France, branded versus private label, 2022-2024



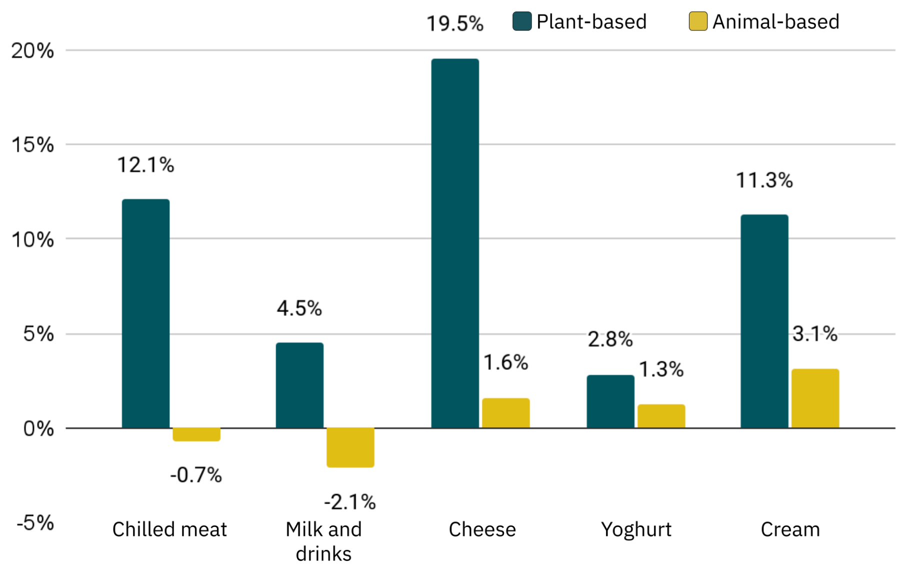
Comparison to animal-based foods

The percentage growth in sales volume of plant-based products has outperformed that of equivalent animal-based products across all categories covered in this report, although plant-based products are starting from a lower base due to their relatively small market size.

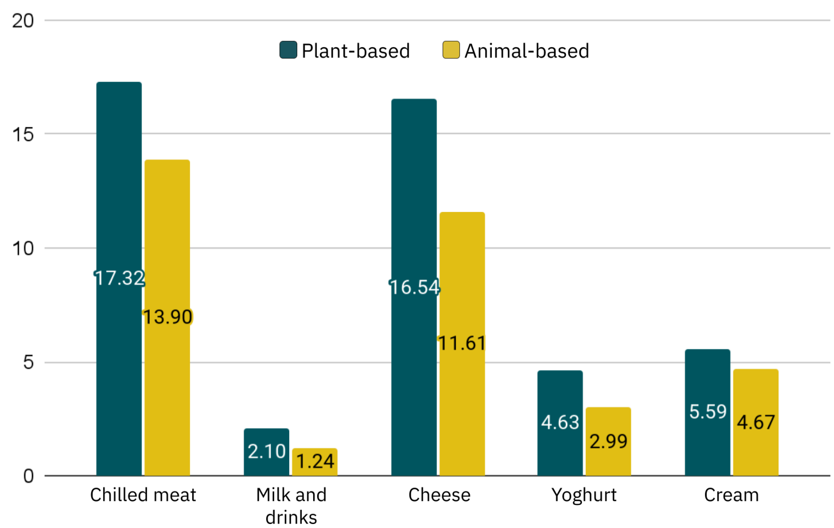
The sales volume of chilled pre-packaged animal-based meat remained steady between 2023 and 2024, while that of plant-based meat grew. In the same period, animal-based milk and drinks sales fell, while plant-based milk and drinks sales rose.

While animal-based cheese, yoghurt and cream all grew, on a percentage basis, the plant-based categories grew more quickly.

Change in the sales volume of pre-packaged plant- and animal-based foods in France, 2023-2024 (%)



Average price per kg of plant- and animal-based foods in France, 2024 (€ per kg)



Plant-based products are consistently more expensive per kg than their animal-based equivalents, with plant-based cream the closest to being cost-competitive.

Plant-based meat

Total market

Between 2022 and 2024, the annual sales value of France's chilled[2] plant-based meat market grew by 31.1%, reaching €156 million. Over the same time period, unit sales rose by 20.8% to 50.8 million units, while sales volume rose 12.9% to 9.0 million kg.

Most of the rise in unit sales and sales volume occurred between 2023 and 2024, following a plateau between 2022 and 2023. Sales value, on the other hand, has risen steadily, perhaps reflecting a period of high inflation in the food sector during 2022.

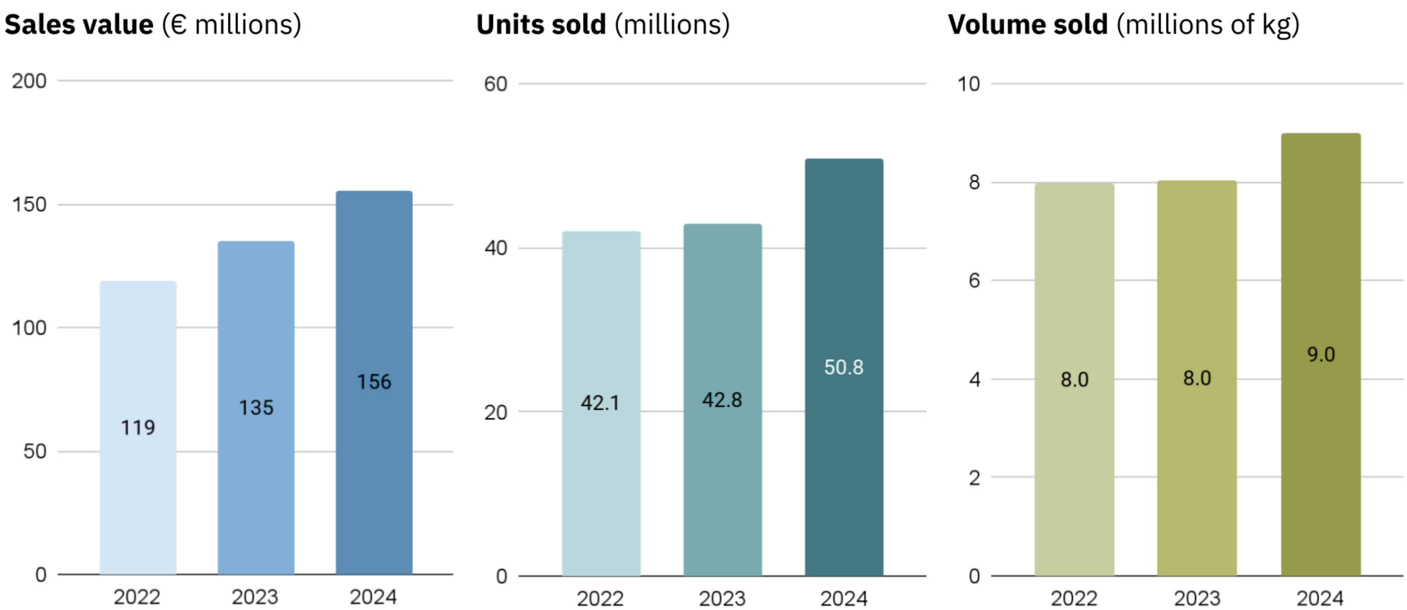
The Circana data for chilled plant-based meat in France covers products in a range of common meat product formats, including sausages, burgers, lardons and slices. However, it was not possible to fully separate out those products that aim to mimic the taste and texture of meat. The data may therefore contain some plant-based products that are not direct analogues for meat, such as bean burgers.

The plant-based meat category does not include falafel, tofu, tempeh or seitan. For comparison, the combined sales value of those four products increased by 34% between 2022 and 2024, reaching €19.2 million (meaning that the market value of plant-based meat was eight times larger in 2024). Sales volume rose by 22% over the same period, declining slightly after a peak in 2023. The average price per kg of these products was €11.88 in 2024, compared to €17.32 for the plant-based meat category.

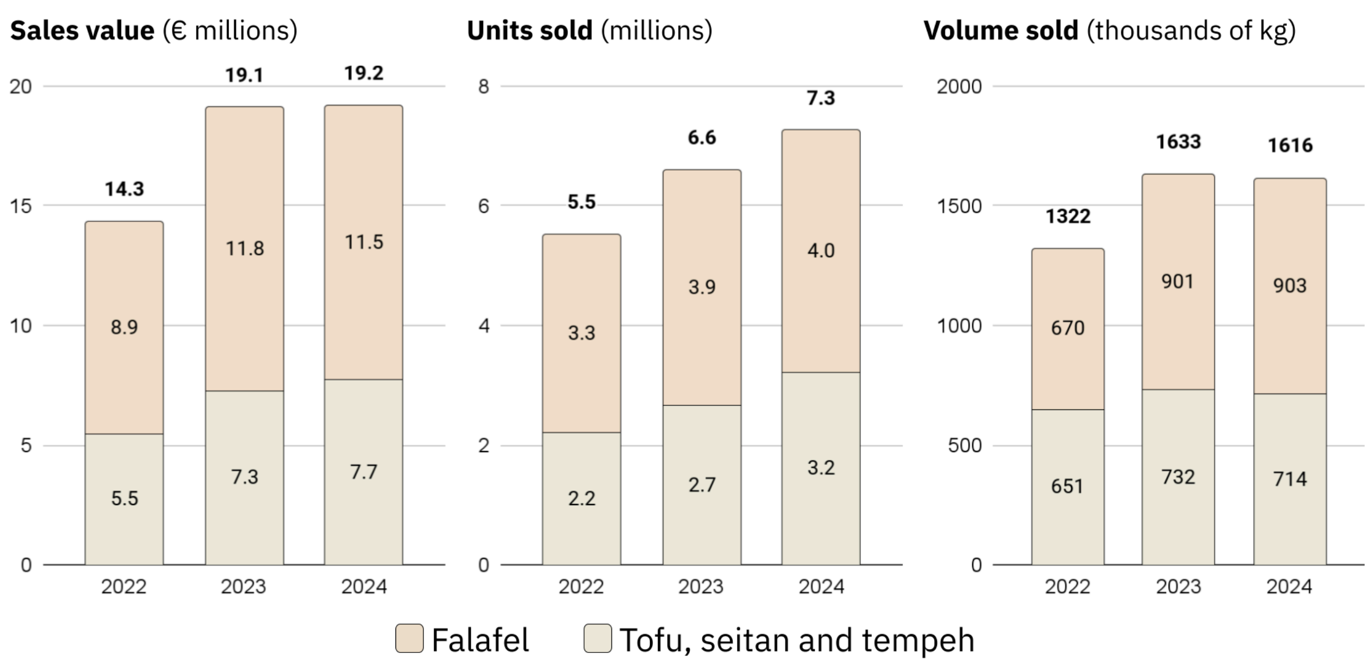
The growth of plant-based meat sales volumes despite this higher price, and the relatively large market size compared to that of falafel, tofu, tempeh or seitan, shows the importance to French consumers of familiar formats, such as sausages and burgers, that can easily be substituted into traditional recipes.

[2] Due to changes in Circana's data coverage, the data for plant-based meat in this year's report only includes chilled plant-based meat.

Chilled plant-based meat sales in France, 2022-2024



Falafel, tofu, seitan and tempeh sales in France, 2022-2024



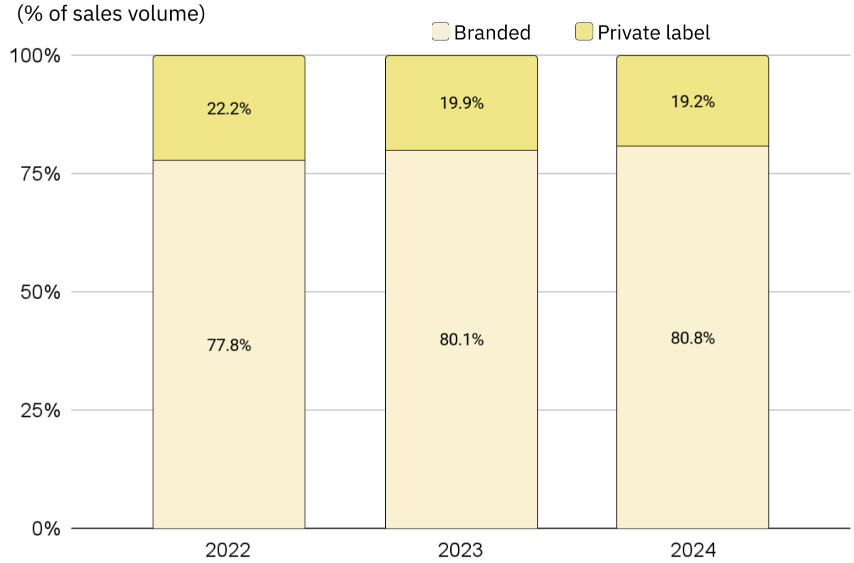
Branded versus private label

The French plant-based meat market is dominated by branded products, perhaps because the sector is still young and has not yet attracted significant investment from retailers.

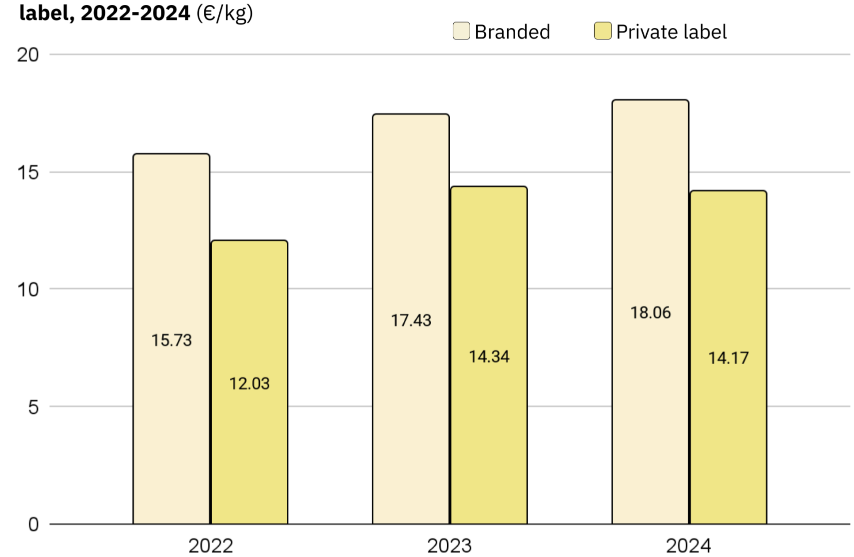
Private-label (retailer own-brand) products' market share fell from 22.2% of sales volume in 2022 to 19.2% in 2024, despite being 22% cheaper per kg, on average, than branded products.

This suggests that consumers are being driven by other factors in addition to price, such as taste or product quality.

France chilled plant-based meat sales by branded or private label, 2022-2024 (% of sales volume)



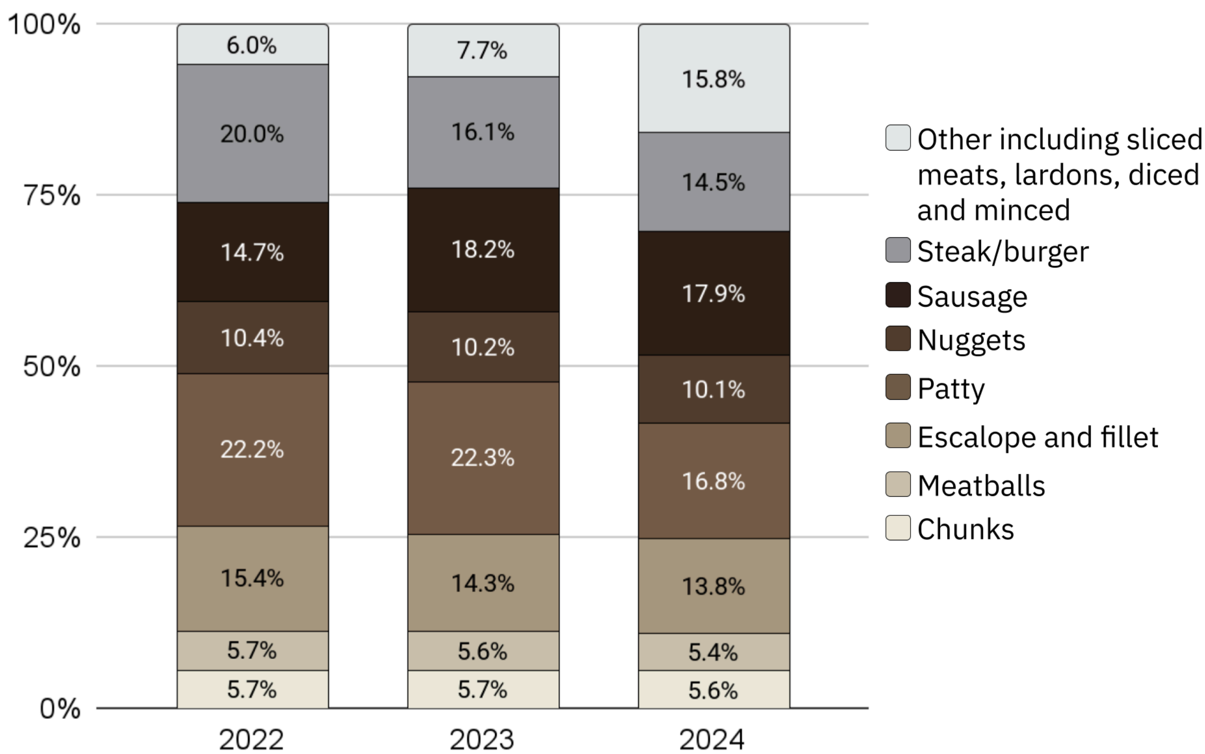
Average price per kg of chilled plant-based meat in France, by branded or private label, 2022-2024 (€/kg)



Product format breakdown

The French plant-based meat market is diverse, with significant market shares for sausages, patties, steak and burgers, escalope and fillets, and nuggets. “Other” formats (as categorised by Circana) have risen from 6.0% to 15.8% of the market, suggesting possible innovation in the sector.

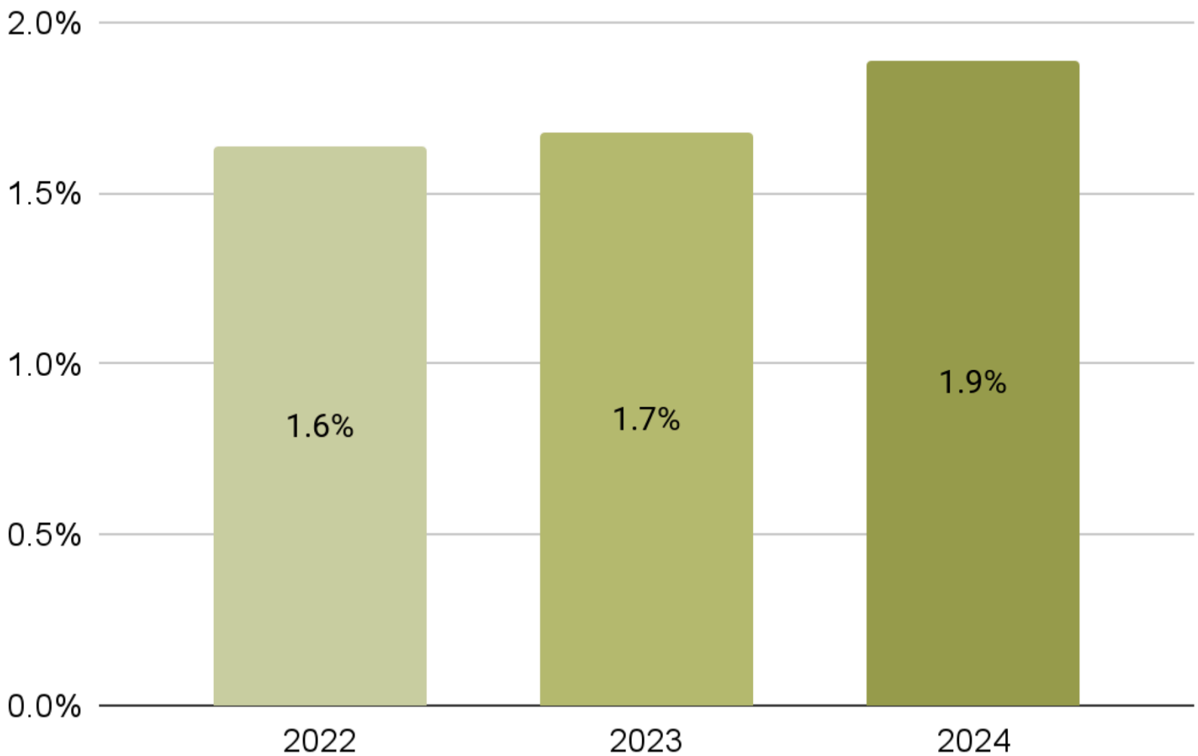
France chilled plant-based meat sales by type, 2022-2024 (% of sales volume)



Market share

Plant-based meat's market share, as a percentage of overall sales volume of plant-based and animal-based chilled pre-packaged meat products, has risen slightly from 1.6% in 2022 to 1.9% in 2024. This shows that plant-based meat has yet to attain mainstream status in France, but is making some progress in market share.

Plant-based meat: share of France's total (plant- and animal-based) chilled pre-packaged meat market, 2022-2024 (% of sales volume)



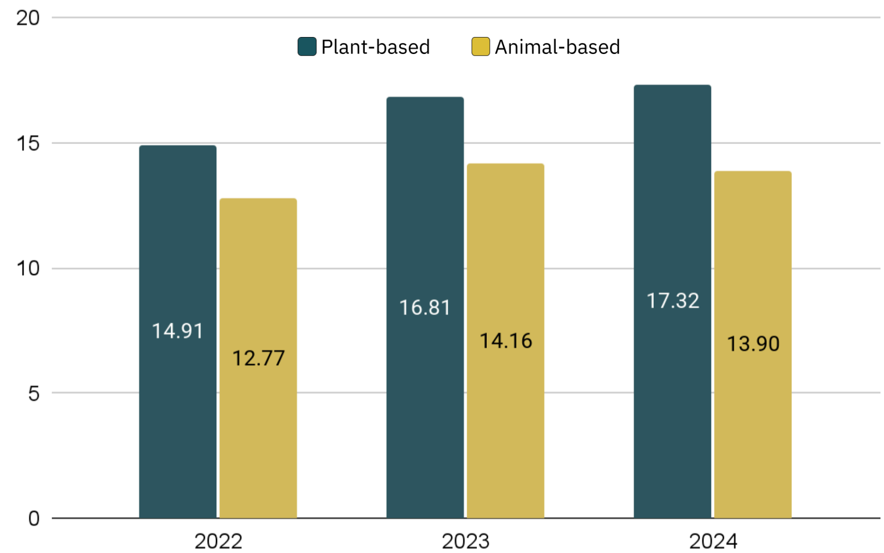
Price trends relative to animal equivalent

Chilled plant-based meat is, on average, more expensive per kg than pre-packaged chilled animal-based meat.

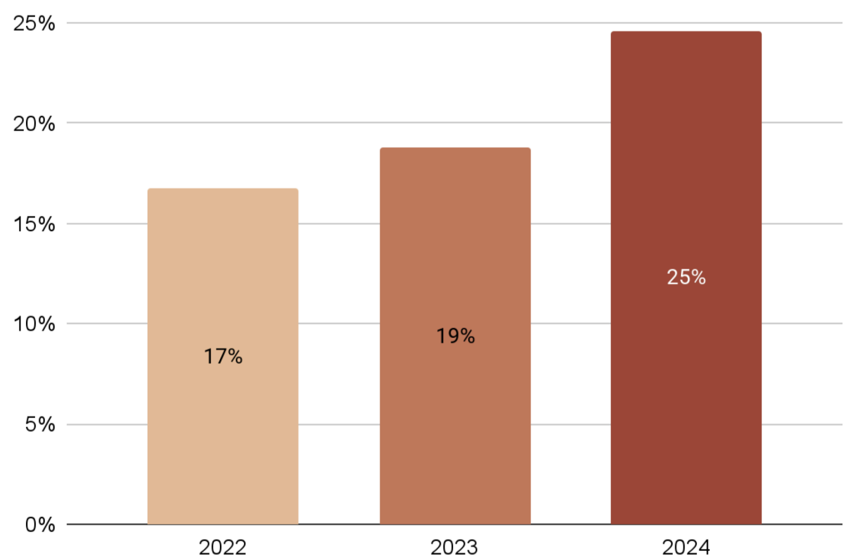
While both animal-based and plant-based meat increased in price between 2022 and 2023, in line with high inflation in the broader food sector, the price of animal-based meat fell between 2023 and 2024, while plant-based meat continued to get more expensive.

The price gap therefore rose from 17% in 2022 to 25% in 2024. The fact that sales of plant-based meat grew despite this price gap indicates again that other factors are likely to be attracting French consumers to the plant-based meat category.

Average price per kg for plant-based and animal-based chilled meat in France, 2022-2024 (€/kg)



Price difference for chilled plant-based meat compared to chilled animal-based meat in France, 2022-2024 (% difference based on €/kg)



Plant-based milk and drinks

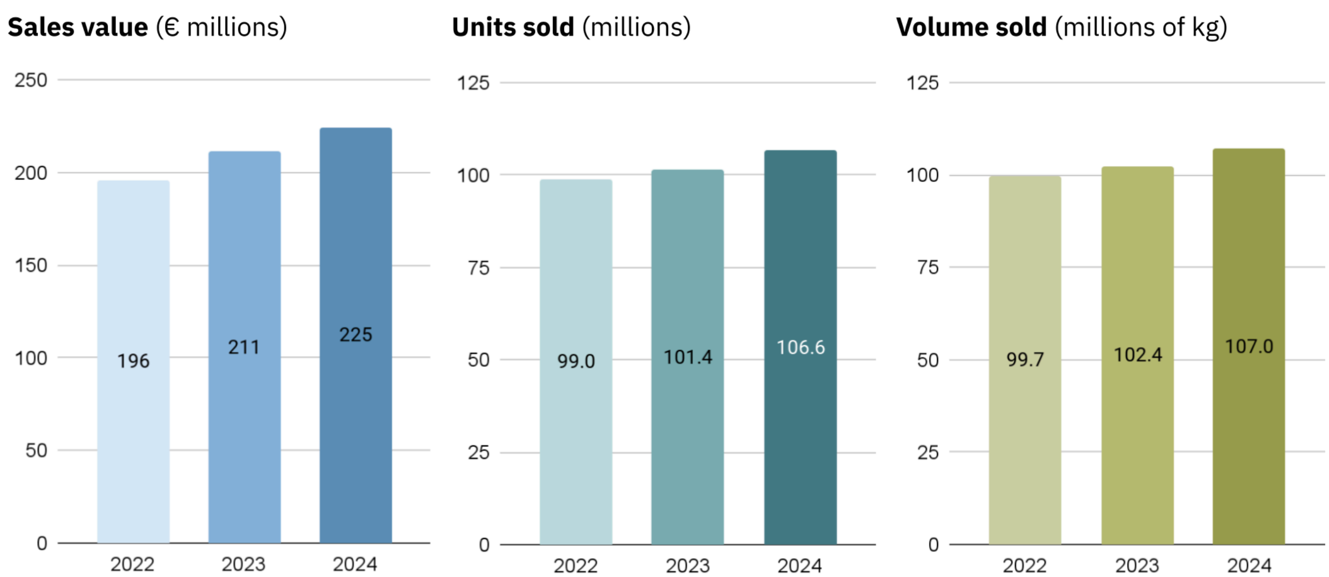
Total market

The plant-based milk and drinks market in France is growing at a moderate pace.

Total annual sales value rose by 14.6% between 2022 and 2024, reaching €225 million. Meanwhile, unit sales rose by 7.6% to 1.07 million units, and sales volume rose by 7.3% to 107 million kg.

The year-on-year percentage increase in annual sales value slowed slightly, from a 7.9% increase between 2022 and 2023 to 6.2% growth between 2023 and 2024. Meanwhile, the growth in unit sales and sales volume accelerated. Sales volume rose by 2.7% between 2022 and 2023, and by 4.5% between 2023 and 2024. This pattern likely reflects price increases during the period of high inflation in 2022 to 2023, followed by a greater increase in demand as inflation eased off in 2024.

Plant-based milk and drinks sales in France, 2022-2024



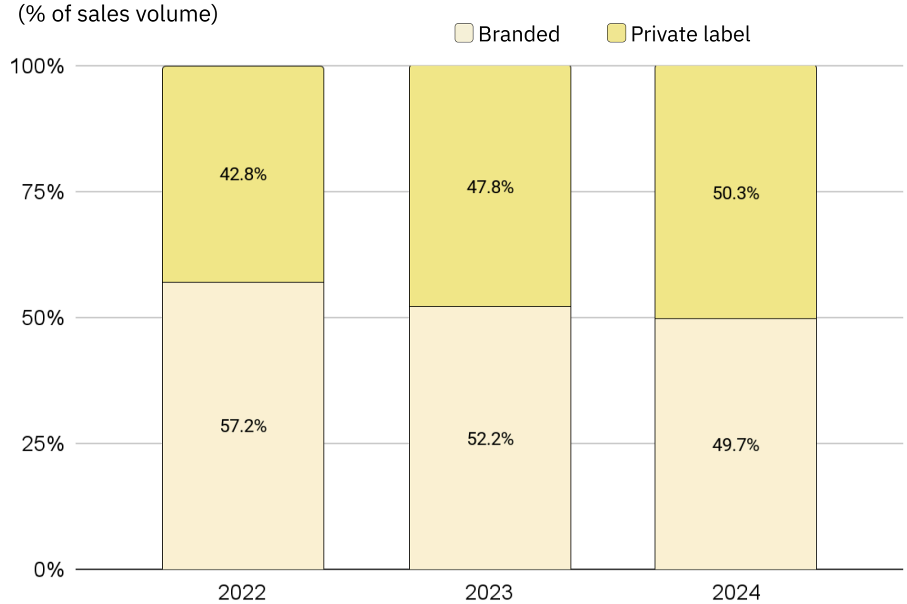
Branded versus private label

Private-label products make up a large and growing proportion of France's plant-based milk and drinks market. They accounted for just over half of the market by volume in 2024.

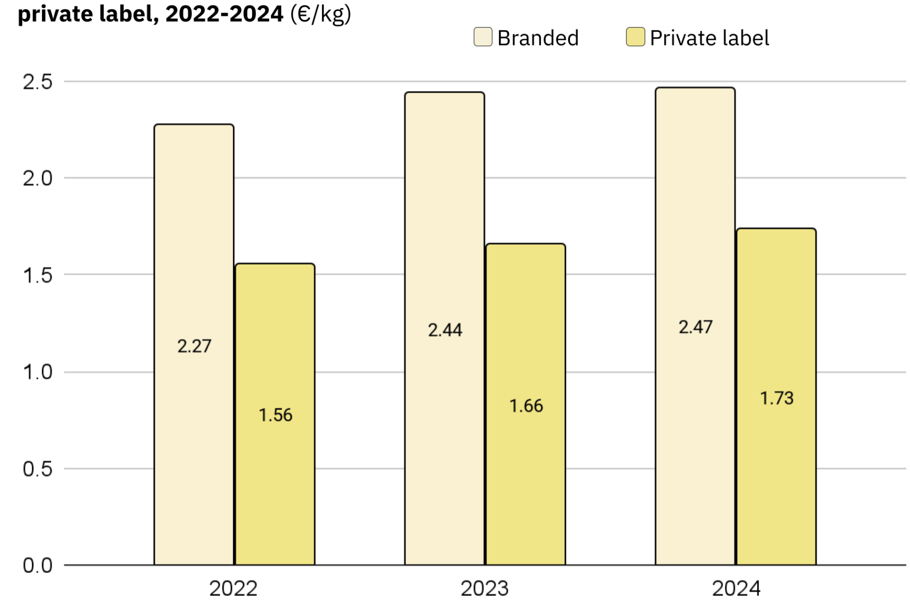
This suggests that plant-based milk and drinks are sufficiently well-established in France that retailers see them as a viable product – although they have not yet achieved as great a market share relative to animal-based milk as they have in some other European countries.

Private-label products are notably cheaper than branded options. In 2024, they cost on average 30% less per kg.

France plant-based milk and drinks sales by branded or private label, 2022-2024 (% of sales volume)



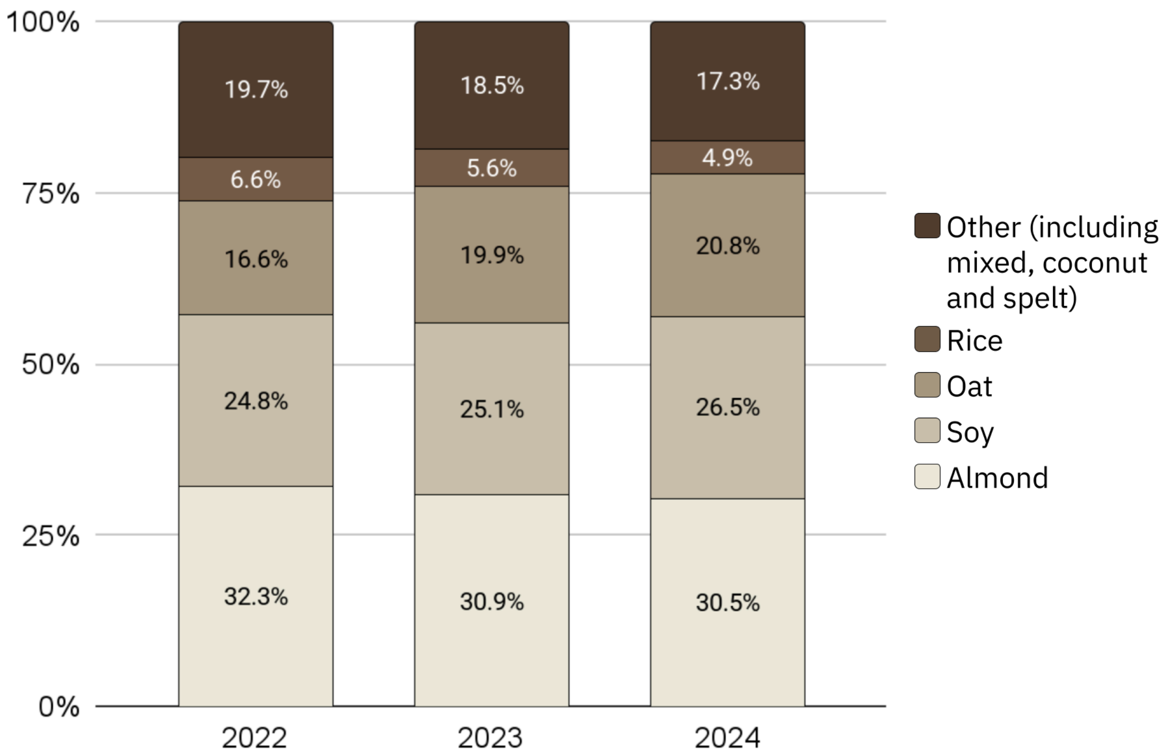
Average price per kg of plant-based milk and drinks in France, by branded or private label, 2022-2024 (€/kg)



Product format breakdown

There is a diverse range of types of plant-based milk and drinks in France, reflecting a fairly well-established market. In 2024, the leading segment (by sales volume) was almond, followed by soy and oat. Oat and soy's market shares increased slightly between 2022 and 2024.

France plant-based milk and drinks sales by base ingredient, 2022-2024
(% of sales volume)

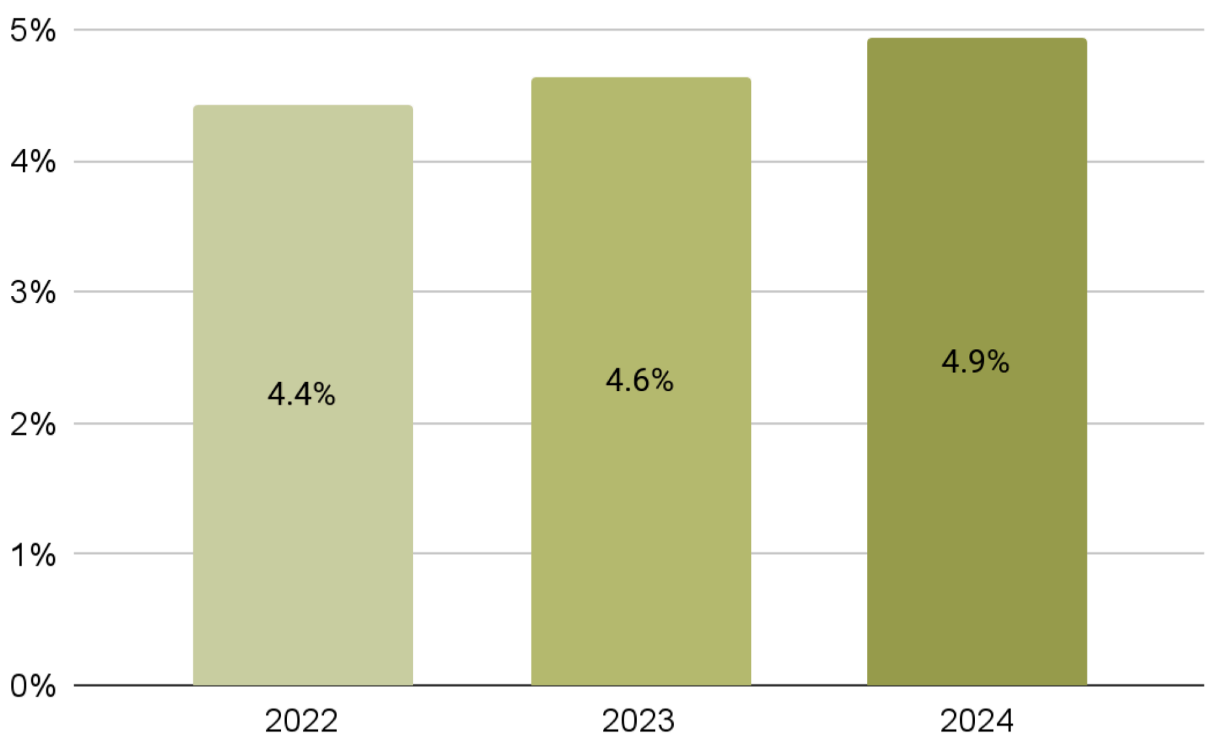


Market share

The market share of plant-based milk and drinks, as a percentage of overall sales volume of plant-based milk and drinks and animal-based milk[3], increased slowly but steadily, from 4.4% in 2022 to 4.9% in 2024.

This is the result of rising sales volumes for plant-based milk and drinks combined with falling sales of animal-based milk, which declined by 4.2% between 2022 and 2024.

Plant-based milk and drinks: share of France's total (plant- and animal-based) milk and drinks market, 2022-2024 (% of sales volume)



[3] Animal-based milk here includes both fresh and long-life milk but excludes powdered and infant milk, and is measured in litres.

Price trends relative to animal equivalent

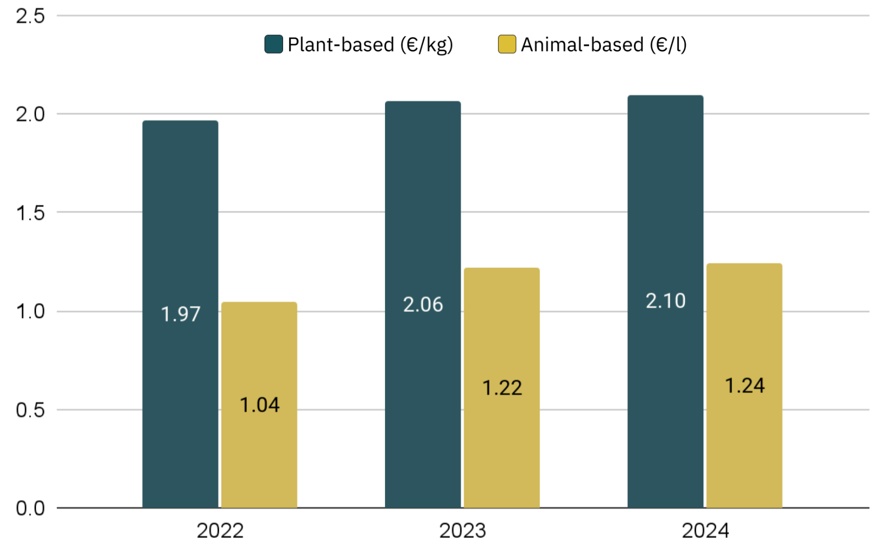
Plant-based milk and drinks remain considerably more expensive than animal-based milk.

On average, plant-based milk and drinks were 88% more expensive[4] per kg than animal-based milk in 2022, but that gap fell to 69% in 2023 and 2024.

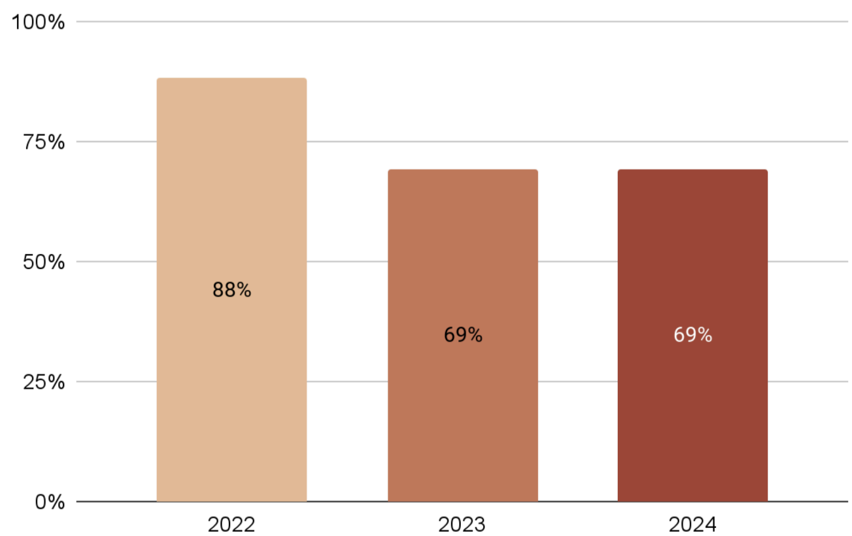
Both plant- and animal-based products saw price increases between 2022 and 2023, but this slowed in 2024.

Private-label plant-based milk and drinks, although considerably cheaper than branded options, remained more expensive than both branded and private-label animal-based milk.

Average price per litre for plant-based and animal-based milk and drinks in France, 2022-2024 (€/l or €/kg)



Price difference for plant-based milk and drinks compared to animal-based milk and drinks in France, 2022-2024 (% difference based on €/l or €/kg)



[4] The Circana dataset measured plant-based milk in kg and animal-based milk in litres. For comparison, it was assumed that one litre weighs roughly 1kg.

Plant-based cheese

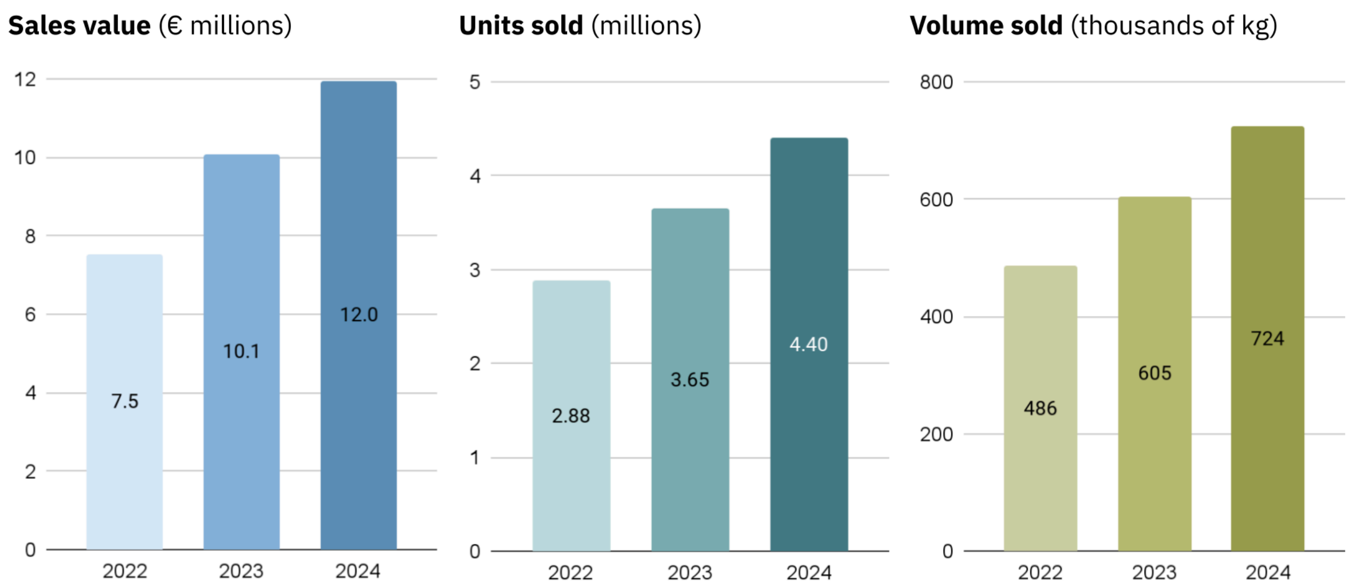
Total market

France's emerging plant-based cheese market is growing strongly.

Its annual sales value rose by 58.7% between 2022 and 2024, reaching €12.0 million. Unit sales rose by 52.8% to 4.40 million units, while sales volume rose by 48.7% to 724,000 kg.

The percentage rate of growth, year-on-year, decreased slightly but the year-on-year increase in absolute sales volume remained steady, rising by around 118 thousand kg each year. Between 2022 and 2023, sales volume rose by 24.4%, followed by a rise of 19.5% between 2023 and 2024.

Plant-based cheese sales in France, 2022-2024

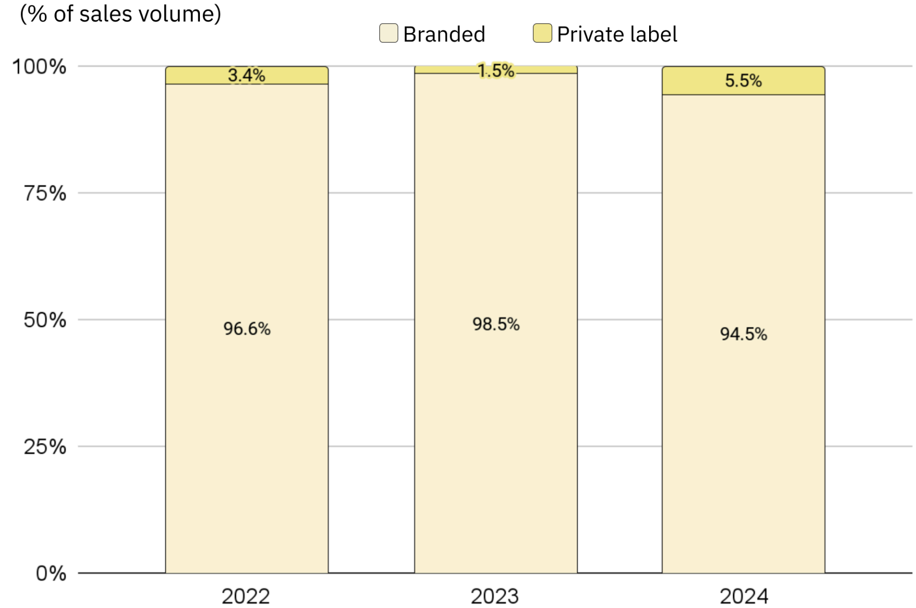


Branded versus private label

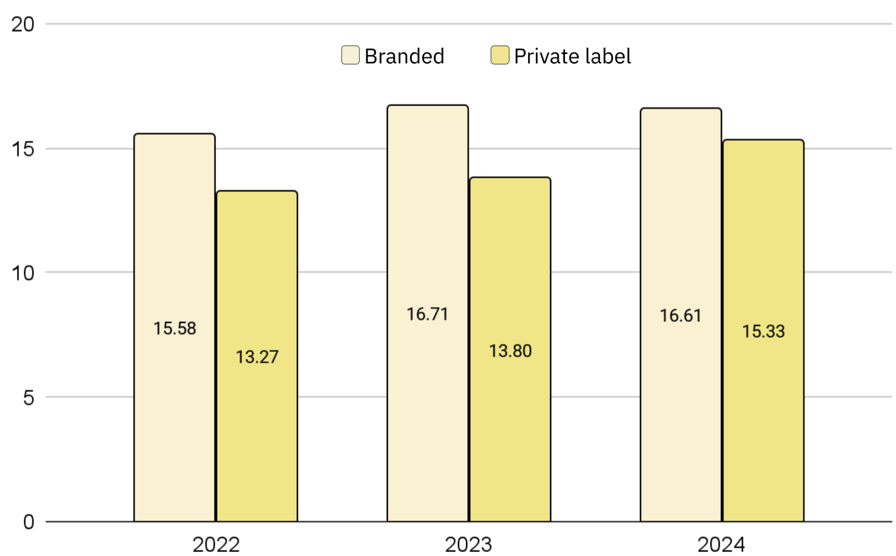
Private-label plant-based cheese products are very uncommon in the French market, but have increased their market share from 1.5% of sales volume in 2023 to 5.5% in 2024, perhaps reflecting retailer interest in a small but rapidly growing category.

Private-label plant-based cheese is slightly more affordable than branded products, although it was only 7.7% cheaper per kg in 2024.

France plant-based cheese sales by branded or private label, 2022-2024 (% of sales volume)



Average price per kg of plant-based cheese in France, by branded or private label, 2022-2024 (€/kg)



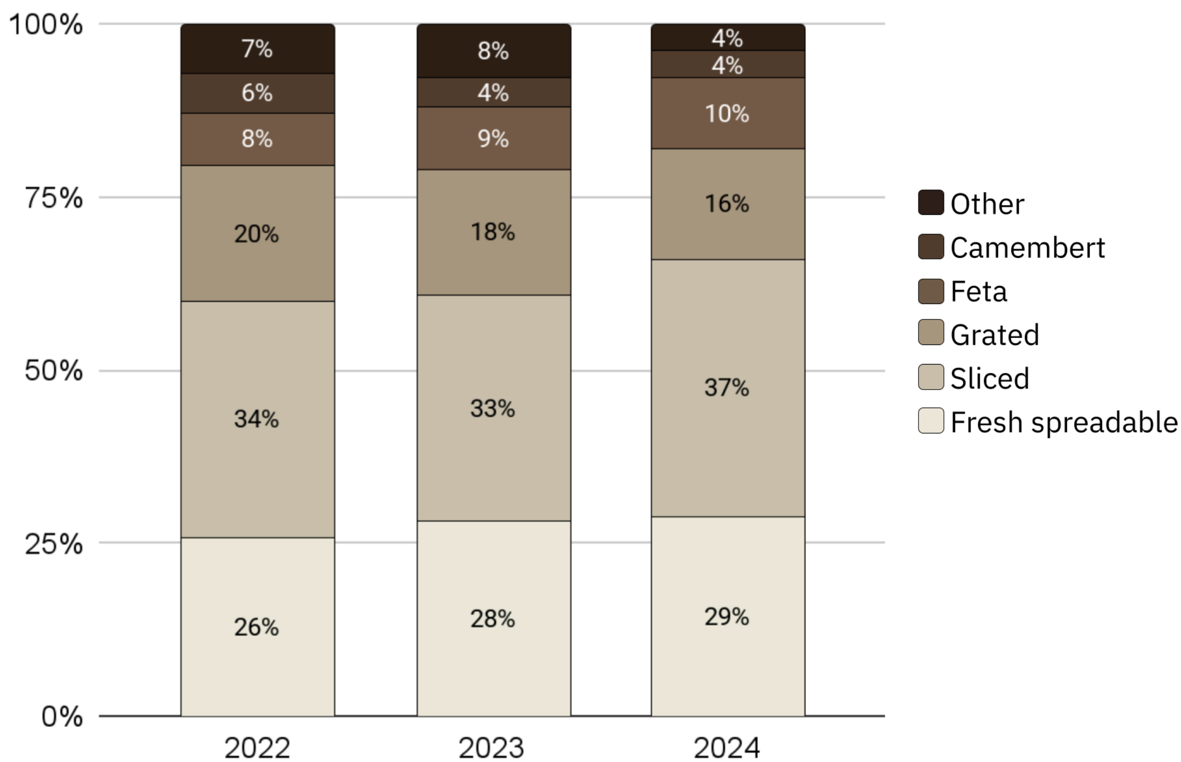
Product format breakdown

In 2024, the best-selling format for plant-based cheese was sliced cheese (37% of sales volume), followed by fresh spreadable (29%) and grated (16%).

There has been growth in the market share of feta, sliced cheese and fresh spreadable cheese.

Given the high growth rate of the overall market, grated cheese did grow in terms of absolute sales volume, even though its market share decreased.

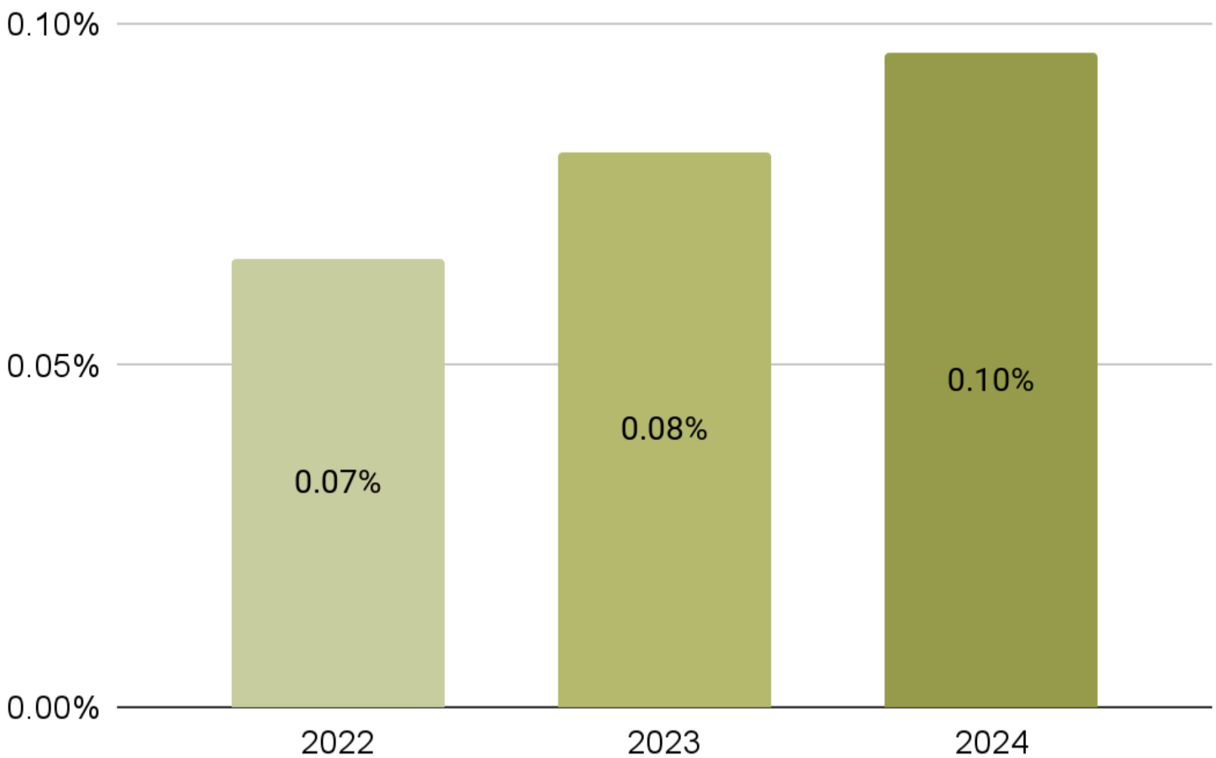
France plant-based cheese sales by type, 2022-2024 (% of sales volume)



Market share

Plant-based cheese's market share, as a percentage of the sales volume of all plant- and animal-based cheese, remains tiny. However, it has increased from 0.07% in 2022 to 0.10% in 2024. The low market share is perhaps unsurprising for a young category in a particularly strong market (France has one of the highest rates of per capita dairy cheese consumption).

Plant-based cheese: share of France's total (plant- and animal-based) cheese market, 2022-2024 (% of sales volume)

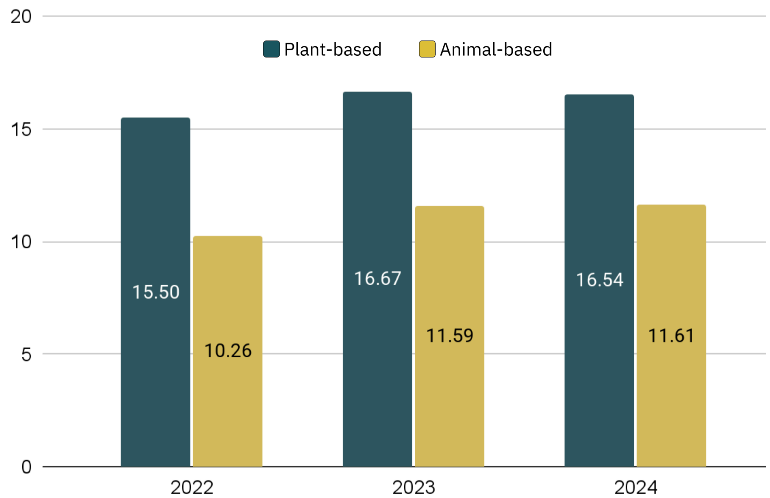


Price trends relative to animal equivalent

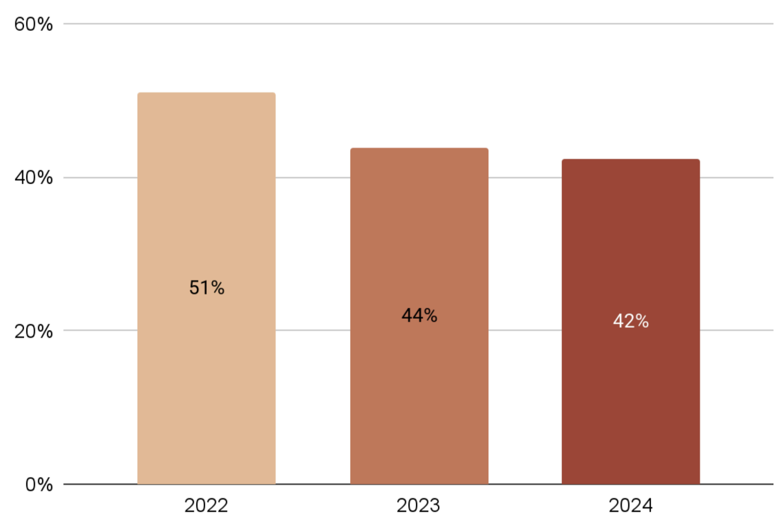
Plant-based cheese is more expensive per kg than animal-based cheese. Both increased in price from 2022 to 2023, in line with inflation across the wider food sector, before steadying.

The price gap has fallen, however: plant-based cheese was 51% more expensive in 2022, and 42% more expensive in 2024.

Average price per kg for plant-based and animal-based cheese in France, 2022-2024 (€/kg)



Price difference for plant-based cheese compared to animal-based cheese in France, 2022-2024 (% difference based on €/kg)



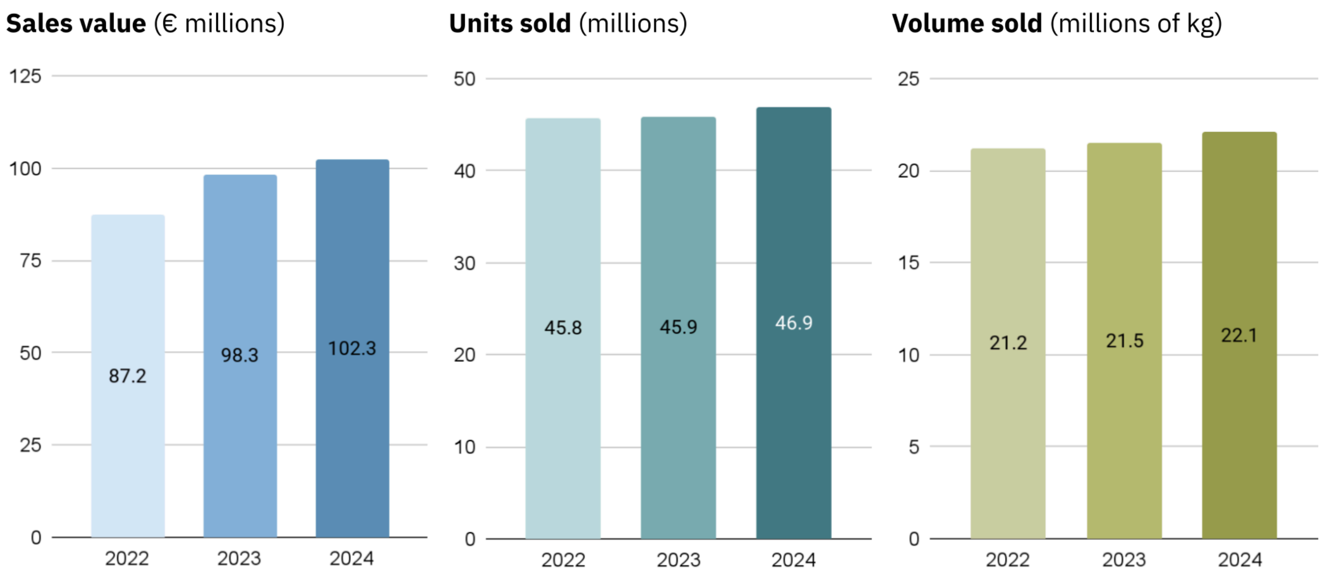
Plant-based yoghurt

Total market

France's market for plant-based yoghurt is growing slowly.

Annual sales value rose by 17.3% between 2022 and 2024, but unit sales rose by only 2.4% and sales volume rose by 4.0% over the same period. Most of the increase in sales value happened between 2022 and 2023, in line with inflation across the food sector.

Plant-based yoghurt sales in France, 2022-2024



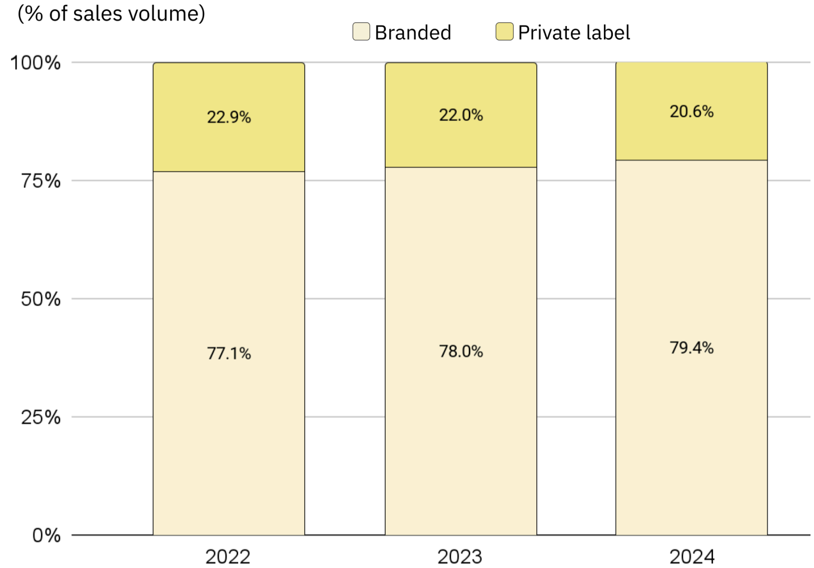
Branded versus private label

Private-label plant-based yoghurts make up a declining proportion of the market, falling from 22.9% of sales volume in 2022 to 20.6% in 2024.

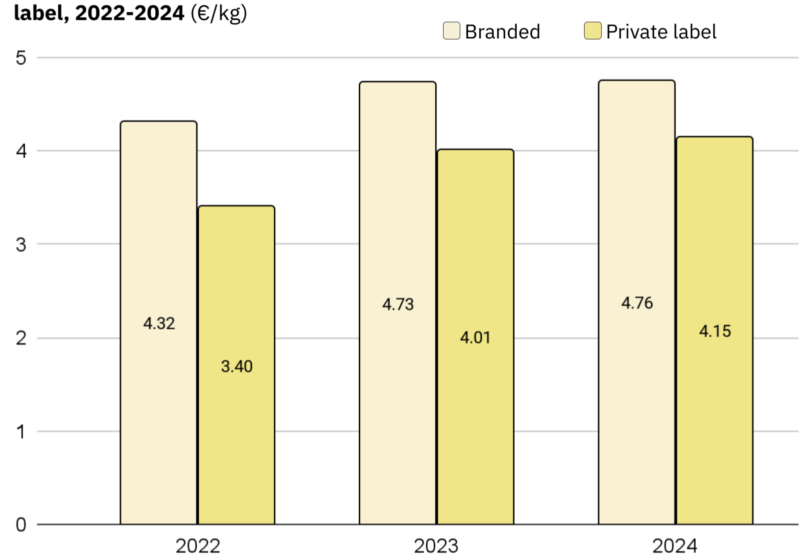
The price gap between private-label and branded products is surprisingly small. Private-label products were 21% cheaper per kg than branded products in 2022, but this gap fell to 13% in 2024.

The falling proportion of private-label sales, despite those options being cheaper, suggests that the price gap is not sufficient to outweigh other consumer considerations, such as taste.

France plant-based yoghurt sales by branded or private label, 2022-2024
(% of sales volume)



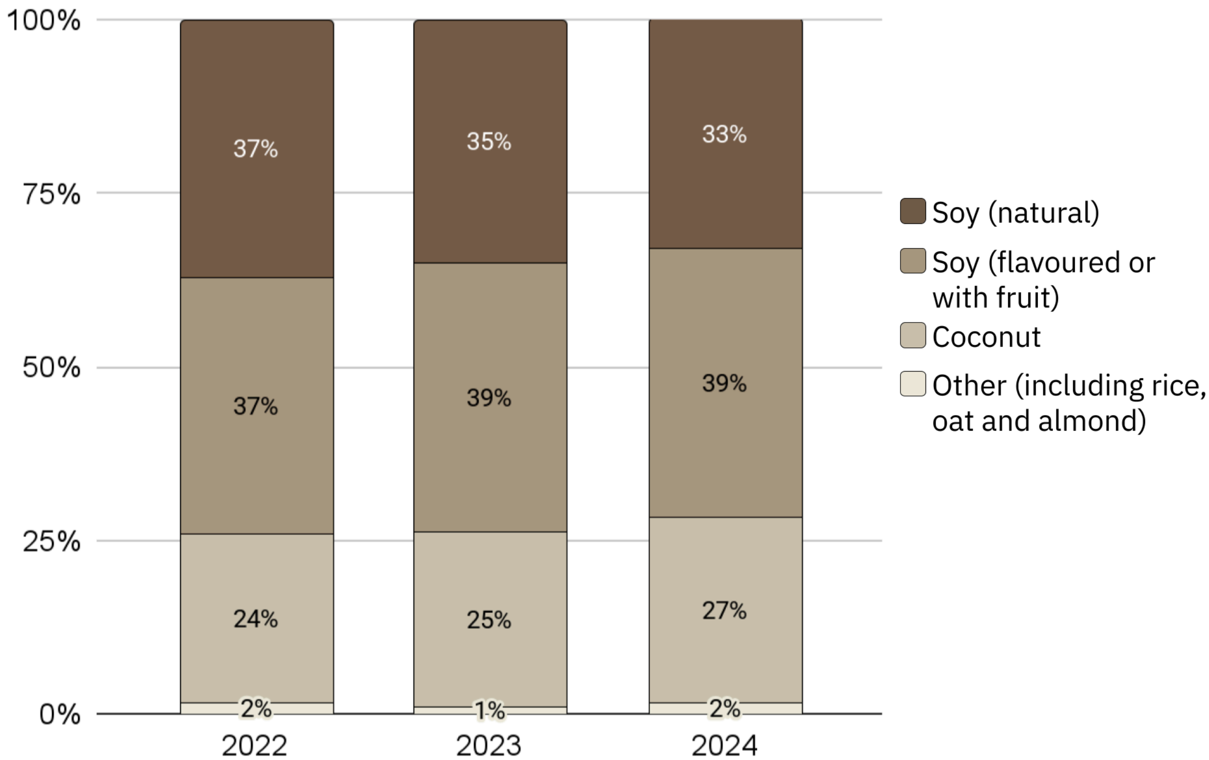
Average price per kg of plant-based yoghurt in France, by branded or private label, 2022-2024 (€/kg)



Product format breakdown

Most plant-based yoghurt sold in France is made from soy (72%), with slightly more soy products being flavoured or containing fruit. Coconut yoghurt follows, with 27% of the market.

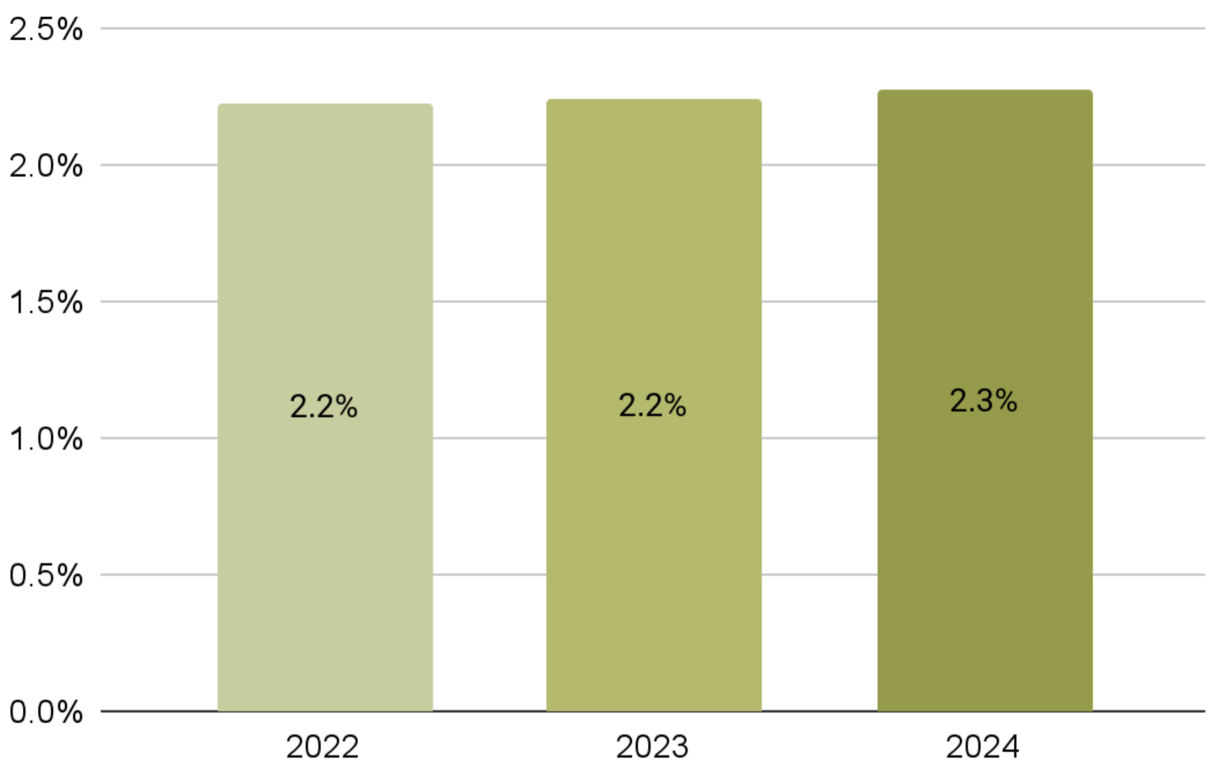
France plant-based yoghurt sales by type, 2022-2024 (% of sales volume)



Market share

The market share of plant-based yoghurt, as a percentage of overall plant- and animal-based yoghurt sales volume in France, remains low but steady, at around 2.3% in 2024. This figure shows that plant-based yoghurt is better established in the French market than, for example, plant-based cheese, but is not yet as commonly consumed as plant-based milk and drinks.

Plant-based yoghurt: share of France's total (plant- and animal-based) yoghurt market, 2022-2024 (% of sales volume)



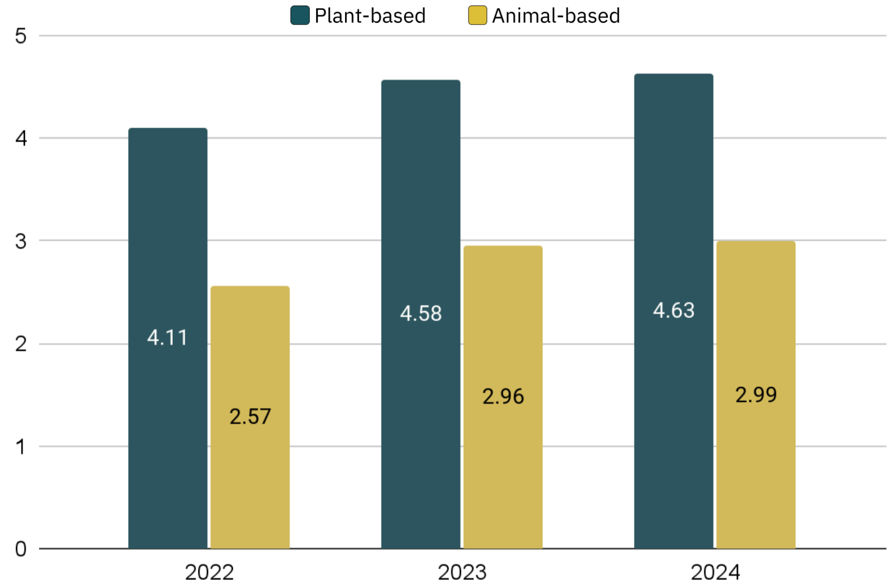
Price trends relative to animal equivalent

Prices of both plant- and animal-based yoghurt grew between 2022 and 2023, before steadying between 2023 and 2024.

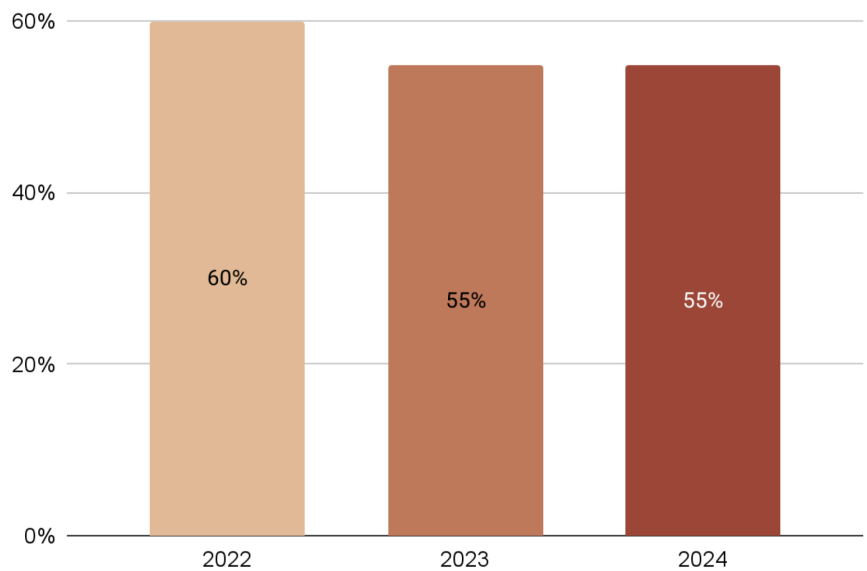
Plant-based yoghurt was 60% more expensive per kg than animal-based yoghurt in 2022, falling to 55% more expensive in 2023 and 2024.

This slight fall in price has coincided with a slight uptick in sales, suggesting that price may play a role in influencing consumer choices. However, the trends in the cheaper private-label category seen above suggest that price is not the primary factor.

Average price per kg for plant-based and animal-based yoghurt in France, 2022-2024 (€/kg)



Price difference for plant-based yoghurt compared to animal-based yoghurt in France, 2022-2024 (% difference based on €/kg)



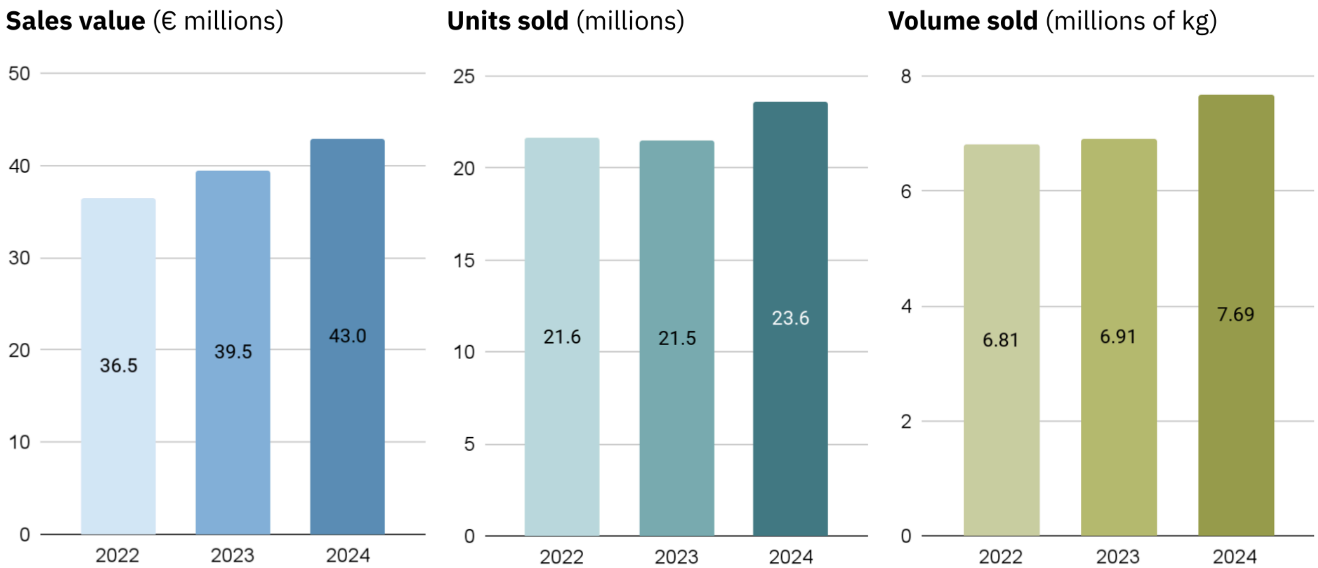
Plant-based cream

Total market

Demand for plant-based cream in France appears to be accelerating, possibly driven by improvements in its affordability relative to animal-based cream.

Annual sales value grew steadily, rising by 17.7% between 2022 and 2024 to reach €43.0 million in 2024. Meanwhile, while unit sales remained steady between 2022 and 2023, in 2024 they were up 9.3% relative to 2022, reaching 23.6 million units. Sales volume also leapt following a plateau between 2022 and 2023: in 2024, sales volume reached 7.69 million kg, a 12.9% increase on 2022.

Plant-based cream sales in France, 2022-2024

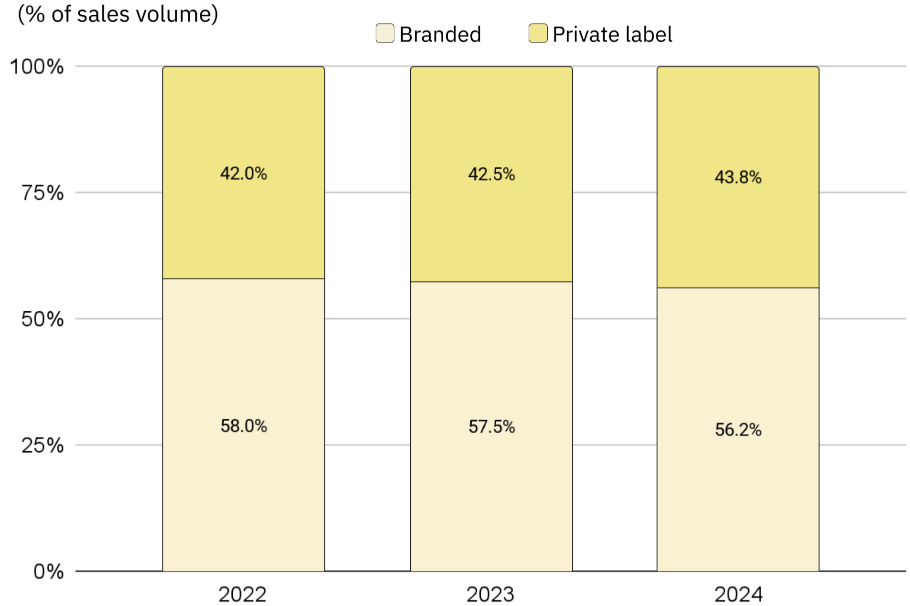


Branded versus private label

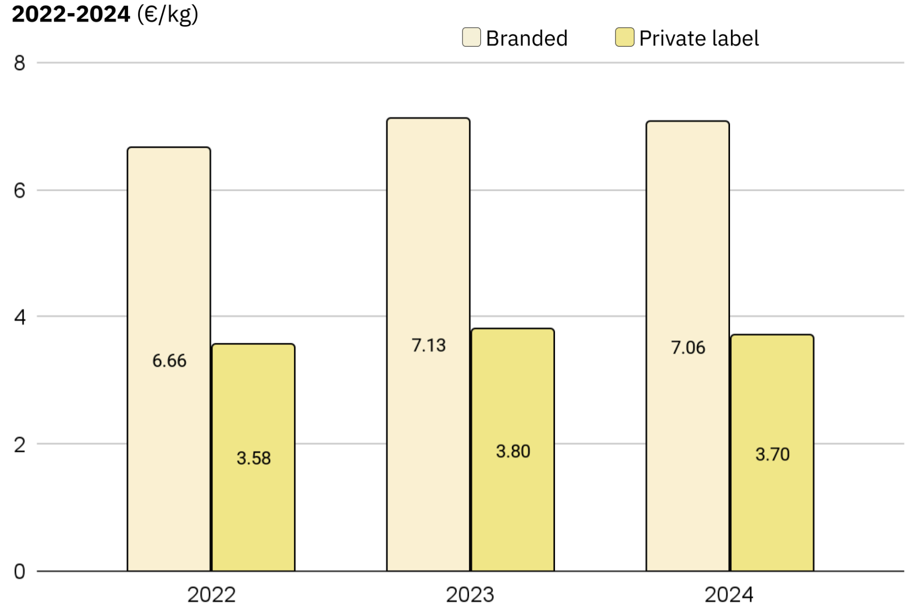
Private-label products make up a large proportion of total plant-based cream sales volume (43.8% in 2024), possibly due to their significantly lower cost per kg than branded products.

In 2024, private label plant-based cream was 48% cheaper per kg, on average, than branded products.

France plant-based cream sales by branded or private label, 2022-2024
(% of sales volume)



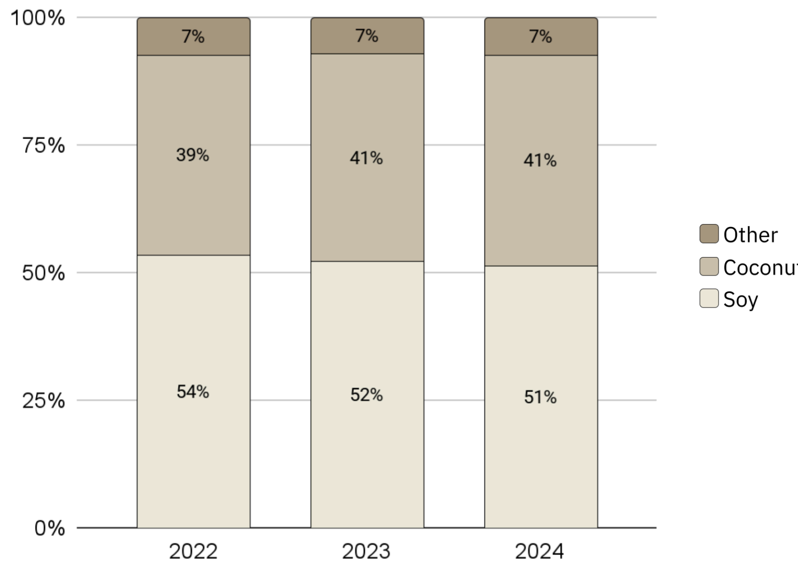
Average price per kg of plant-based cream in France, by branded or private label, 2022-2024 (€/kg)



Product format breakdown

Soy and coconut make up most of the plant-based cream options available in France, suggesting that there may be further room for diversification in this small but growing category.

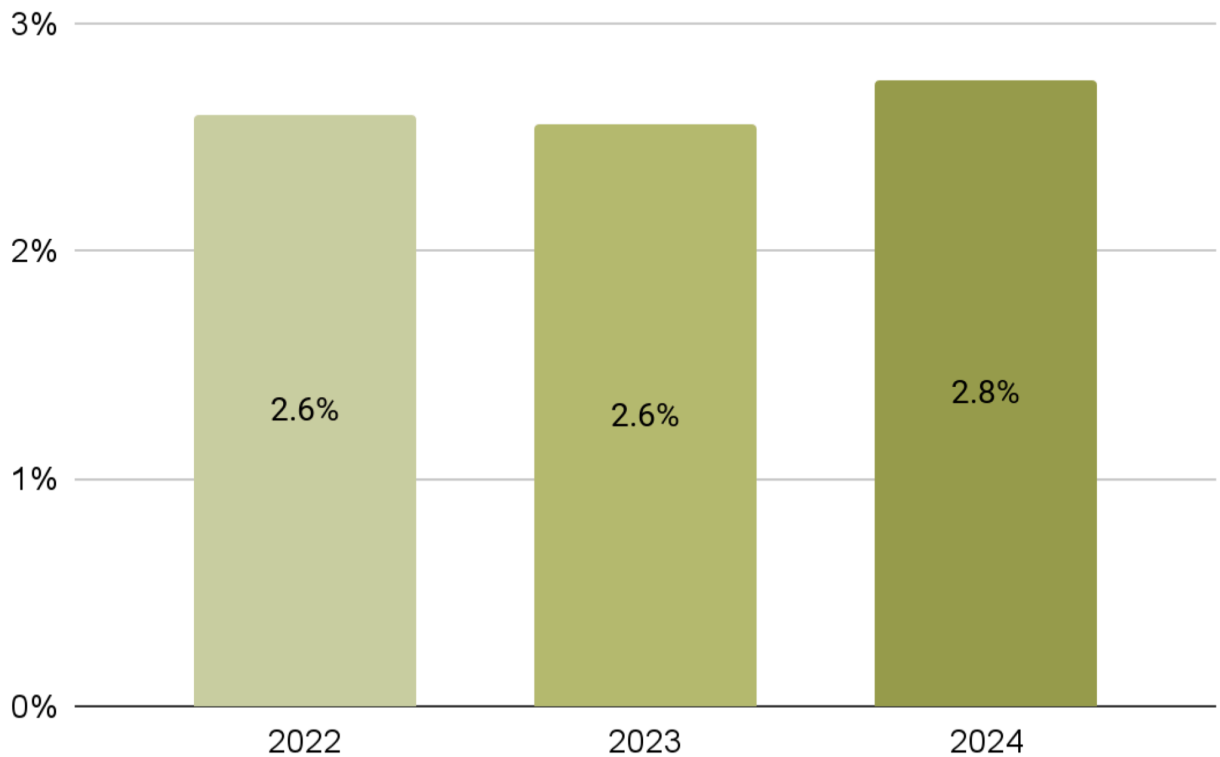
France plant-based cream sales by ingredient base, 2022-2024
(% of sales volume)



Market share

The market share of plant-based cream, as a share of overall sales volume of plant- and animal-based cream, increased to 2.8% in 2024.

Plant-based cream: share of France's total (plant- and animal-based) cream market, 2022-2024 (% of sales volume)



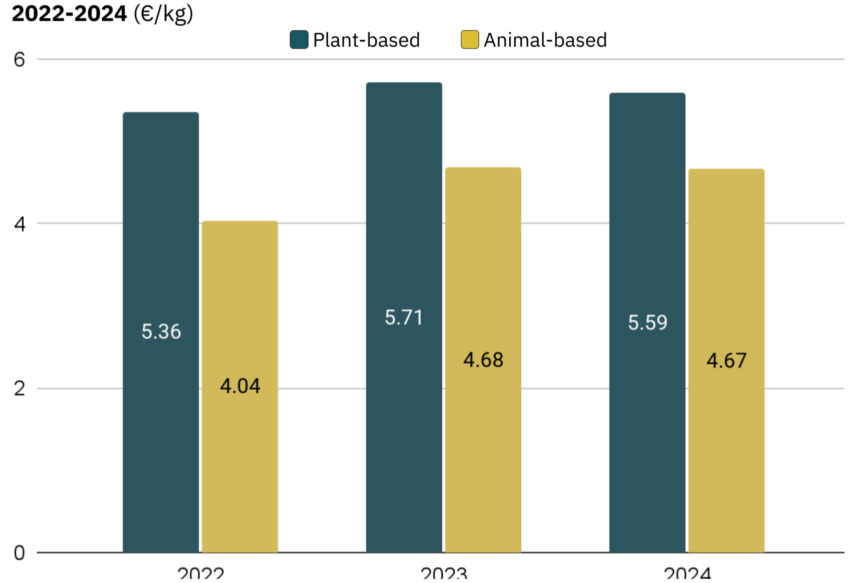
Price trends relative to animal equivalent

Plant-based cream has become more affordable relative to animal-based cream, partly due to a decrease in the price of plant-based cream between 2023 and 2024, and partly because the price of animal-based cream remained high after rising between 2022 and 2023.

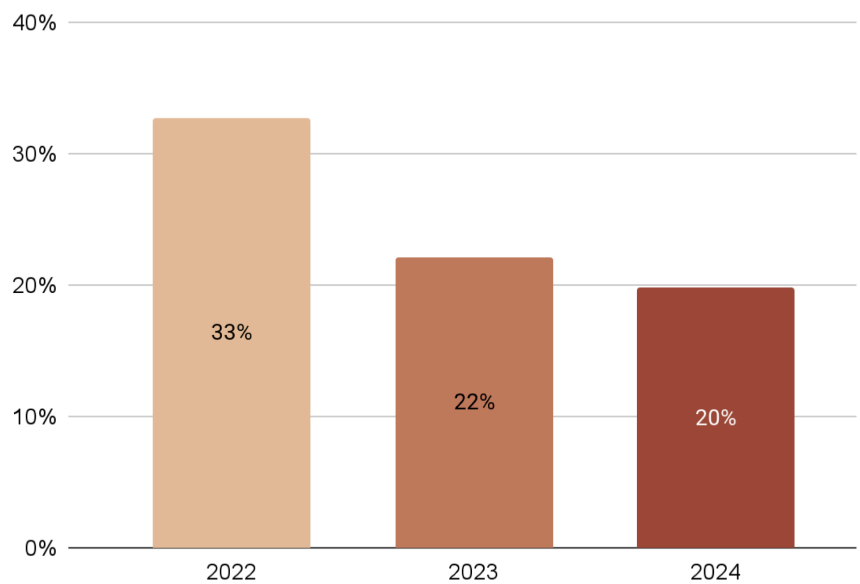
In 2022, plant-based cream cost 33% more per kg than animal-based cream, and this gap fell to 20% by 2024.

It is likely that the narrowing price gap has attracted more consumers to try plant-based cream, as reflected in the rising sales volume.

Average price per kg for plant-based and animal-based cream in France, 2022-2024 (€/kg)



Price difference for plant-based cream compared to animal-based cream in France, 2022-2024 (% difference based on €/kg)



Closing remarks

France's plant-based market appears to be accelerating, with sales volumes rising as food price inflation has fallen.

The rise of private-label products, particularly in the relatively mature plant-based milk and drinks category, suggests an opportunity for retailers to offer affordable options that can reach the mass market.

However, as consumers are still choosing branded products in many cases despite their higher price, it remains crucial to balance affordability with other factors important to consumers, such as taste and product quality.

Helen Breewood,

Senior Market and Consumer Insights Manager at the Good Food Institute Europe

France's steady growth in the plant-based sector reflects a strong foundation and promising trajectory within the broader European landscape. This momentum offers a valuable opportunity to explore innovative financing mechanisms to support the next generation of alternative protein infrastructure. Market uncertainty remains one of the key bottlenecks identified by investors, and these positive trends could help alleviate some of these concerns, encouraging greater capital flows into the sector.

To truly unlock this potential, collaboration will be essential – not only across European markets, but also between stakeholders: from companies forming strategic partnerships, to public and private investors aligning efforts, and knowledge-sharing between research institutions and industry leaders. Building this interconnected ecosystem will be crucial to scale impact and accelerate the shift towards a more sustainable food system.

Helene Grosshans,

Infrastructure Investment Manager at the Good Food Institute Europe

About the Good Food Institute Europe

The Good Food Institute Europe is a nonprofit and think tank helping to build a more sustainable, secure and just food system by diversifying protein production.

We champion the science, policies and investment needed to make alternative proteins delicious, affordable and accessible across Europe.

By advancing plant-based foods, cultivating meat from cells and producing ingredients through fermentation, we can boost food security, meet our climate targets and support nature-friendly farming. GFI Europe is powered by philanthropy.

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