June 2026

2023 - 2025

France plant-based food retail market insights

Meat, milk and drinks, cheese, yoghurt, and cream.

Photo: AOSTE

Europe

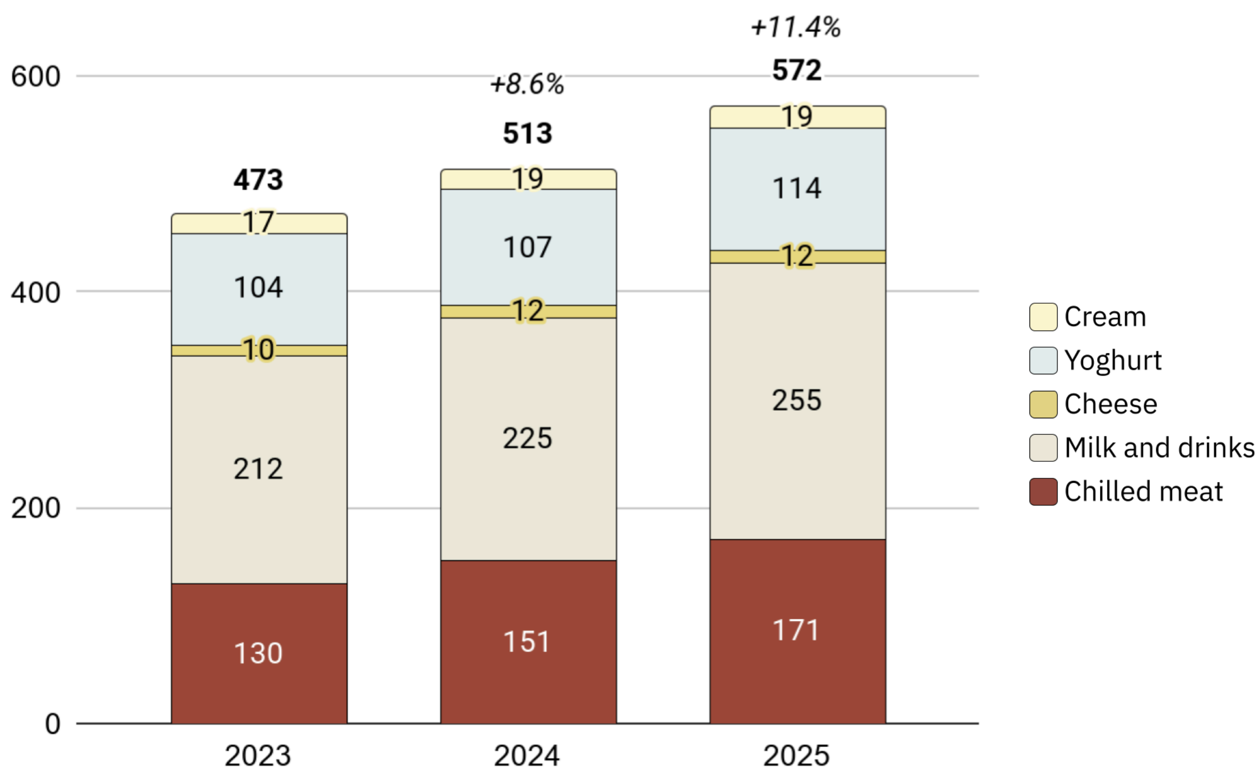
Executive summary

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 2023 and 2025, based on data from Circana.

The French retail market across **five categories** of plant-based food was valued at **€572 million in 2025**.	The combined sales value of five categories of plant-based foods in France **grew by 11%** in 2025.	The combined sales volume of five categories of plant-based foods in France **grew by 13%** in 2025.

Demand for plant-based food accelerated in France in 2025, with strong growth in both branded and private-label products and growth across all five plant-based categories in this report. However, the French plant-based market remains young, with only plant-based milk reaching a significant market share relative to its animal-based counterpart (5.5% of sales volume in 2025).

Plant-based food sales value by category in France, 2023-2025 (€ millions)



The combined sales value across the five plant-based categories was €572 million in 2025. Year-on-year growth in sales value was 8.6% in 2024 and 11.4% in 2025, indicating an accelerating market.

Similarly, overall unit sales grew 7.2% in 2024 and 13.7% in 2025, reaching 250 million. Sales volume also accelerated, growing 4.6% in 2024 and 13.3% in 2025, reaching 163 million kg.

Branded plant-based sales volume grew **1.2% in 2024** and **13.3%** in 2025.	**Private-label** plant-based sales volume grew **9.4% in 2024** and **13.2% in 2025**.

All five plant-based categories in this report grew in terms of sales value, unit sales and sales volume in both 2024 and 2025. Their percentage sales volume growth outperformed that of their animal-based equivalents in 2025.

The most well-established plant-based category in 2025 was milk and drinks, with the largest sales value, the highest market share, and ongoing growth despite being more expensive than animal-based milk.

Plant-based milk and drinks in 2025			
€255 million annual sales value	**5.5%** of overall plant- and animal-based milk sales volume	**14.8% year-on-year growth** in sales volume	**68% more expensive per litre** than animal-based milk

Plant-based meat saw double-digit growth in both 2024 and 2025. Sales volume accelerated, rising 13.1% in 2024 and 16.8% in 2025.

Plant-based cheese remains a niche category, at just 0.09% of all cheese sales volume. The sales volume growth rate slowed from 14.9% in 2024 to 5.9% in 2025.

Demand for plant-based yoghurt accelerated, with sales volume rising 2.1% in 2024 and 6.8% in 2025. It accounted for 2.4% of the sales volume of all yoghurt in 2025.

Plant-based cream was 13% cheaper than animal-based cream in 2025. It accounted for 1.6% of cream sales volume in 2025. Sales volume rose 10.0% in 2024 and 4.0% in 2025.

This year's report features a new chapter on **tofu, tempeh and seitan**. These products are not classed as plant-based meat or counted towards the plant-based total because they are not marketed explicitly as analogues of specific animal-based products. This contrasting positioning makes them an interesting comparison to plant-based meat, which does aim to replicate meat's taste and texture. Plant-based meat had a sales volume 14.5 times higher than the combined sales volume of tofu, tempeh and seitan in 2025.

Overview of plant-based food sales by category in France, 2023-2025

	Sales value			Unit sales			Sales volume		
	2025, € million	2024-25 change	2023-25 change	2025, million units	2024-25 change	2023-25 change	2025, million kg	2024-25 change	2023-25 change
Chilled meat	171.3	13.5%	32.1%	58.2	19.4%	42.5%	10.1	16.8%	32.1%
Milk and drinks	255.1	13.4%	20.6%	122.4	15.4%	21.0%	122.3	14.8%	19.7%
Cheese	12.2	5.4%	21.5%	4.5	6.4%	23.2%	0.7	5.9%	21.7%
Yoghurt	114.3	6.6%	9.8%	52.6	7.0%	8.6%	24.8	6.8%	9.0%
Cream	18.9	1.9%	9.2%	11.9	5.2%	12.2%	4.7	4.0%	14.4%
Total	**571.7**	**11.4%**	**21.0%**	**249.6**	**13.7%**	**21.9%**	**162.6**	**13.3%**	**18.5%**

Bonus data on additional products that are not counted towards the plant-based total

Tofu, tempeh and seitan	8.0	20.9%	17.2%	3.0	25.4%	26.7%	0.7	22.7%	4.5%

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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 or fast-food outlets.

Data for 2023, 2024 and 2025 covers 52-week periods, with the exact dates depending on the product category.

Note that due to ongoing refinement and backdating of the datasets by Circana, the figures reported here are not directly comparable with those reported in the previous edition of this report. Specifically, the data on sales from discounter stores in France has been improved by Circana.

Furthermore, the coverage of the plant-based cream category has changed since the last edition of this report, meaning that the category now more accurately captures those products positioned as dairy alternatives.

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 includes both products that mimic meat's taste and texture and also some products that do not replicate meat, such as bean burgers, because it was not possible to fully separate out these products. Plant-based meat products may contain 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.

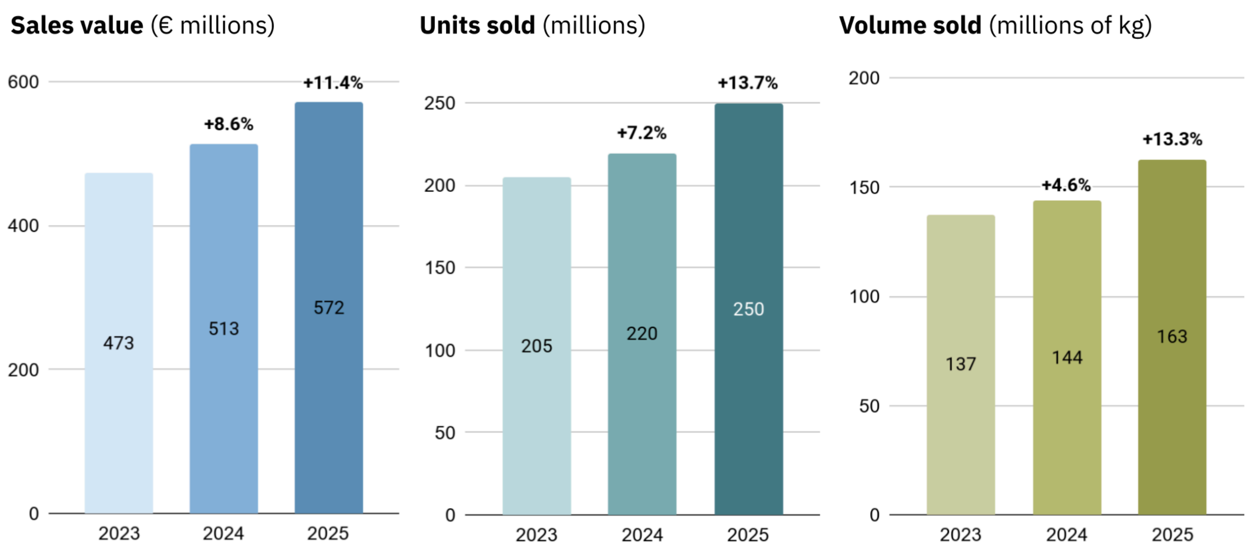
Overall plant-based food market

Total French plant-based market

France's plant-based market grew strongly in 2025, with demand accelerating compared with 2024.

The total annual sales value across five plant-based categories (chilled meat, milk and drinks, cheese, yoghurt and cream) rose by 11.4% in 2025 to €572 million, up 21.0% from 2023. Unit sales rose 13.7% in 2025, reaching 250 million, 21.9% higher than in 2023. Sales volume reached 163 million kg, up by 13.3% from 2024 and up by 18.5% from 2023.

Plant-based food sales across five categories in France, 2023-2025



Categories

Plant-based milk and drinks was the largest plant-based category in France in 2025, accounting for 45% of plant-based sales value. It was followed by plant-based meat (30%) and plant-based yoghurt (20%).

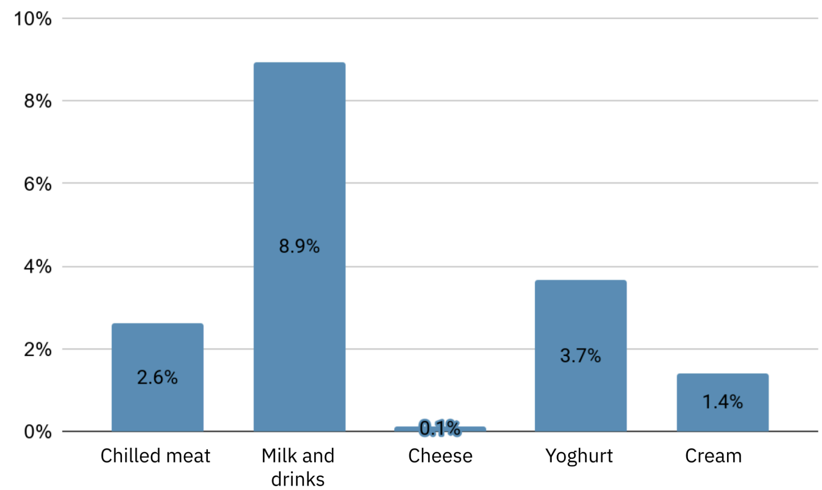
Plant-based milk and drinks were also the most well-established product category in terms of market share relative to animal-based equivalents, at 8.9% of sales value and 5.5% of sales volume in 2025.

In 2025, plant-based meat, yoghurt and cream had reached small but steady or growing levels of market share.

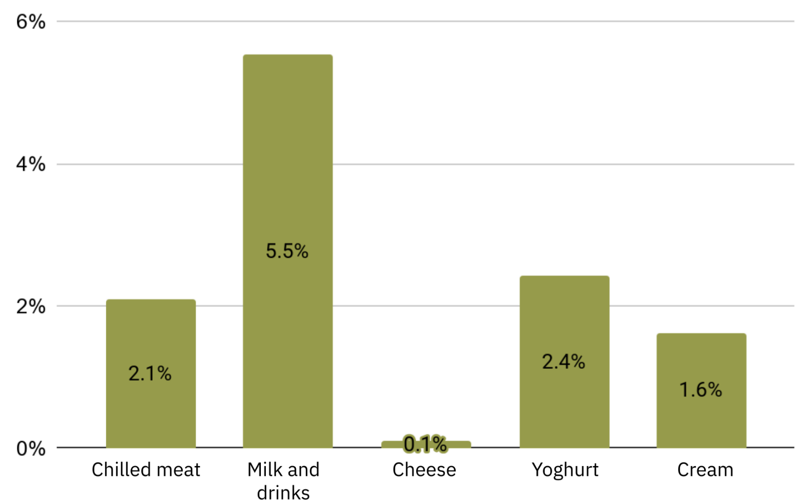
Plant-based cheese was the smallest plant-based category covered in this report, with the lowest market share, at just 0.1% of sales value and volume compared to dairy cheese.

All plant-based categories in this report grew in sales value, unit sales and sales volume in both 2024 and 2025. The fastest-growing plant-based categories in terms of 2025 sales value were chilled meat (up 13.5%) and milk and drinks (up 13.4%).

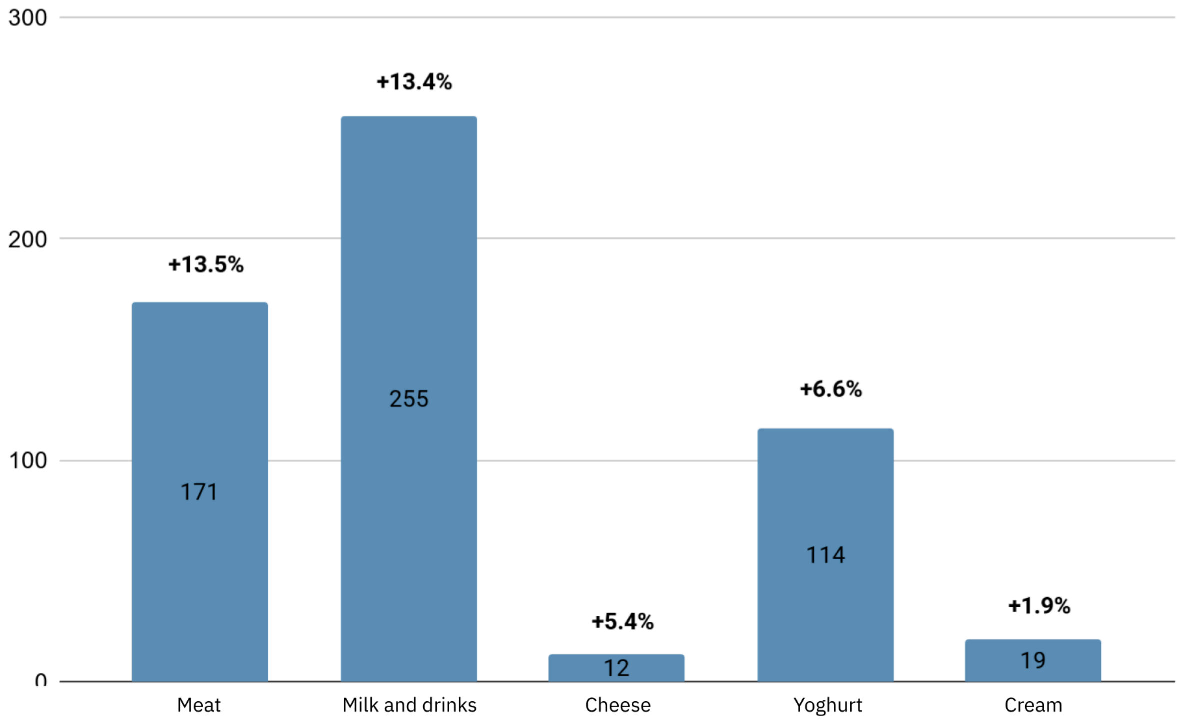
Plant-based food: share of France’s total pre-packaged (plant- and animal-based) sales for each category, 2025 (% of sales value)



Plant-based food: share of France’s total pre-packaged (plant- and animal-based) sales for each category, 2025 (% of sales volume)



Plant-based food sales value and growth rates* by category in France, 2025
(€ millions)



** The percentages above each column denote the change in sales value of that category between 2024 and 2025.*

Branded versus private label

Private-label products, ie, those sold by a retailer under their own brand, saw faster growth in sales volume in 2024 (+9.4%) than branded products (+1.2%). However, in 2025, branded (+13.3%) and private-label products (+13.2%) grew at similar rates.

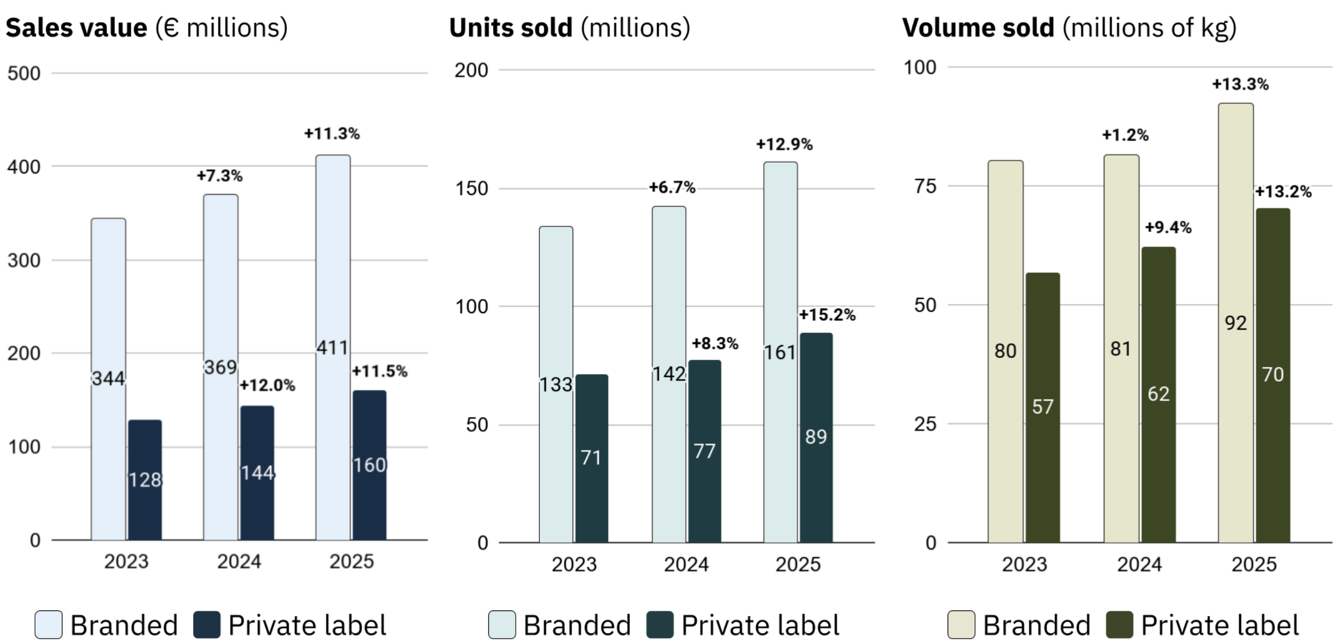
This pattern suggests that affordability might have become a less critical influence on sales in 2025, which may be due to inflation in the French food sector having fallen since its peak in early 2023.

Private-label products tend to be cheaper per kg than their branded counterparts, and have a particularly large price advantage in the plant-based cream category (38% cheaper per kg than branded options in 2025). Plant-based cheese was the one exception where private-label products were slightly more expensive per kg than branded products in 2025.

Plant-based sales and growth rates across five product categories in France, branded versus private label, 2023-2025

	Sales value			Unit sales			Sales volume		
	2025, € million	2024-25 change	2023-25 change	2025, million units	2024-25 change	2023-25 change	2025, million kg	2024-25 change	2023-25 change
Branded	411	11.3%	19.5%	161	12.9%	20.4%	92	13.3%	14.7%
Private label	160	11.5%	25.0%	89	15.2%	24.7%	70	13.2%	23.8%

Plant-based food sales across five categories in France, branded versus private label, 2023-2025



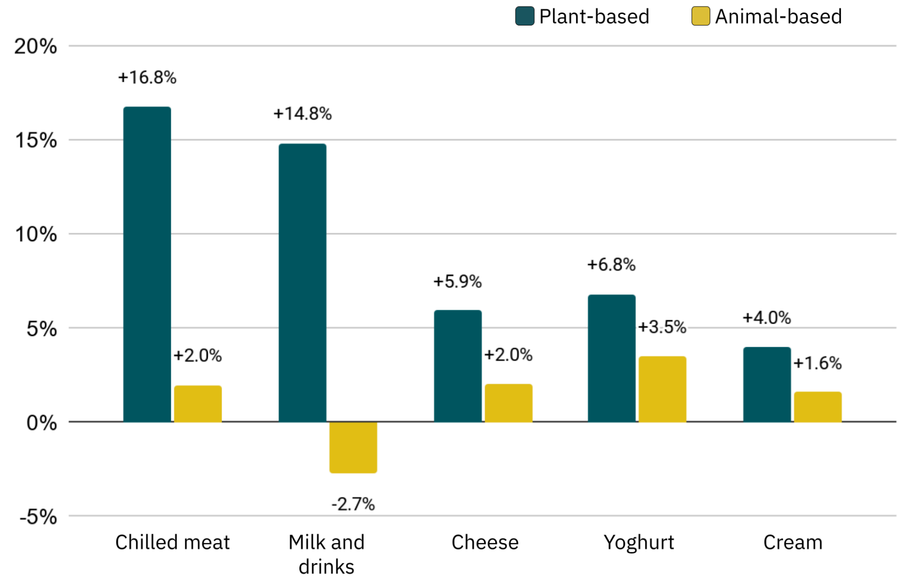
Comparison to animal-based foods

Plant-based products experienced higher sales volume growth in percentage terms than their animal-based counterparts across all five categories in 2025, although plant-based products started from a lower base due to their relatively small market size.

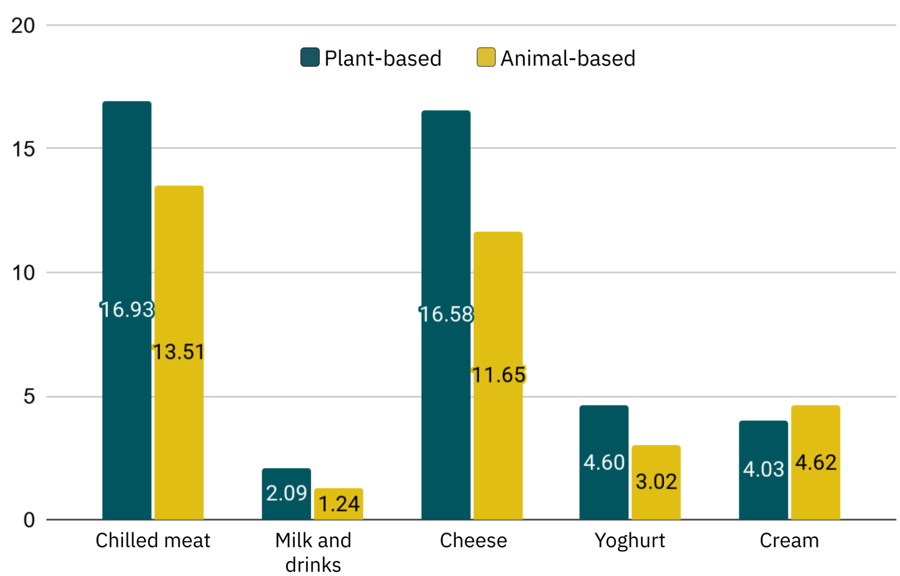
The sales volume of animal-based milk and drinks fell 2.7% in 2025, but all other animal-based categories grew.

Plant-based products were more expensive per kg than their animal-based equivalents in 2025 in four categories. The exception was plant-based cream, which was 13% cheaper than animal-based cream in 2025.

Change in the sales volume of pre-packaged plant- and animal-based foods in France, 2024-2025 (%)



Average price per kg of plant- and animal-based foods in France, 2025 (€ per kg)



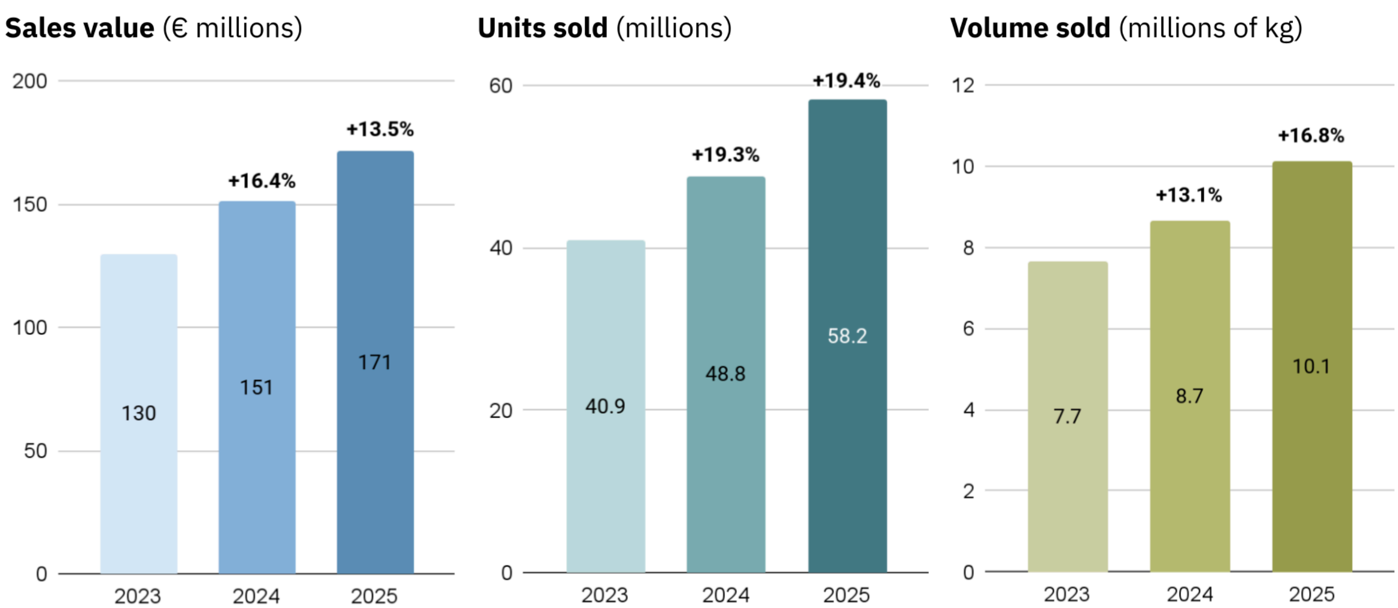
Plant-based meat

Total market

Demand for plant-based meat[1] in France is growing strongly.

Annual sales value rose to €171 million in 2025, up 13.5% since 2023 and up 32.1% since 2023. Unit sales reached 58.2 million in 2025, 19.4% higher than in 2024 and 42.5% higher than in 2023. Sales volume rose 16.8% to 10.1 million kg in 2025, 32.1% higher than in 2023.

Chilled plant-based meat sales in France, 2023-2025

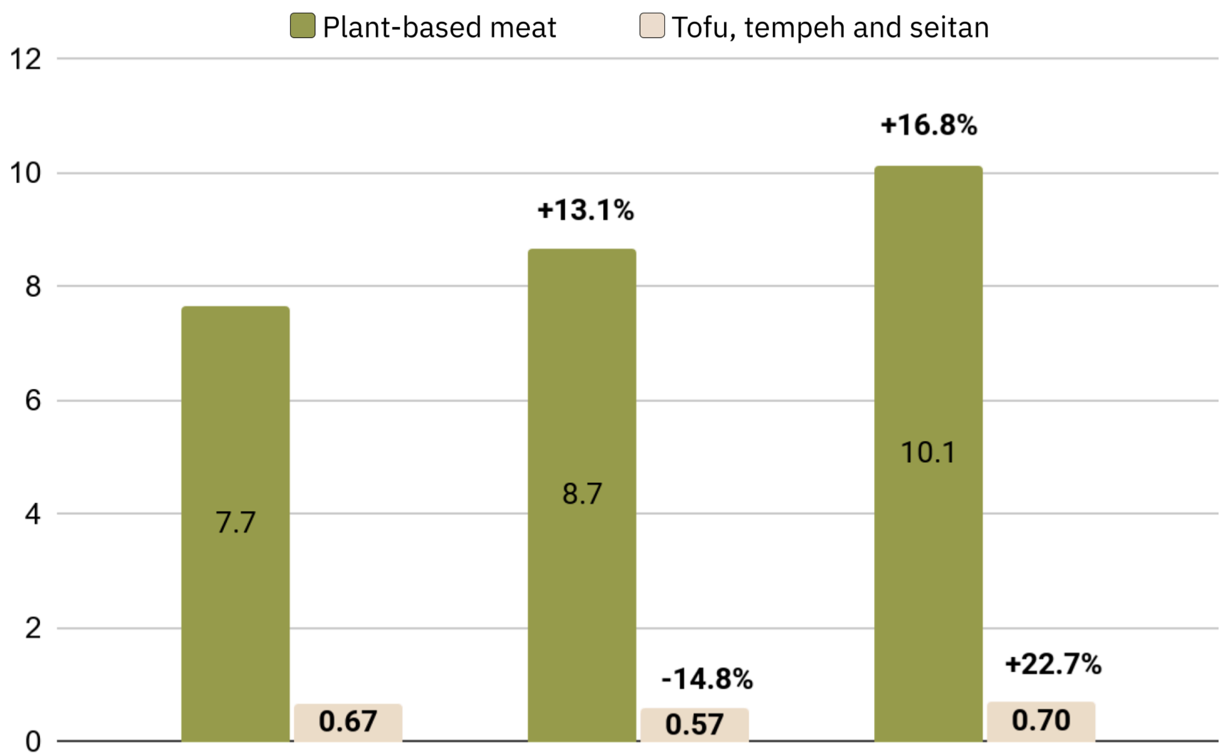


[1] Data covers chilled products only; data on frozen products was not available. The Circana data for chilled plant-based meat in France covers products in a range of common meat product formats, including sausages, burgers, lardons and slices. It includes both products that directly mimic the taste and texture of meat, and those that use "meaty" formats but are not direct analogues for meat, such as bean burgers. Tofu, tempeh and seitan are not counted as plant-based meat, and are reported separately in the chapter "Spotlight on tofu, tempeh and seitan".

The plant-based meat category does not include tofu, tempeh or seitan, since these are not typically positioned as direct substitutes for meat in the French market. For comparison, the combined sales value of those three products increased by 20.9% in 2025, following a 3.1% dip during 2024. Further details are presented in the separate chapter "Spotlight on tofu, tempeh and seitan".

In 2025, plant-based meat had a sales volume 14.5 times higher than combined sales of tofu, tempeh and seitan. This is despite plant-based meat costing €16.93/kg, compared with €11.46/kg for tofu, tempeh and seitan, in 2025 – indicating that products in formats traditionally associated with meat, such as meatballs, burgers and sausages, are the leading choice for French consumers.

Plant-based meat compared to tofu, tempeh and seitan in France, 2023-2025 (sales volume, million kg)



Branded versus private label

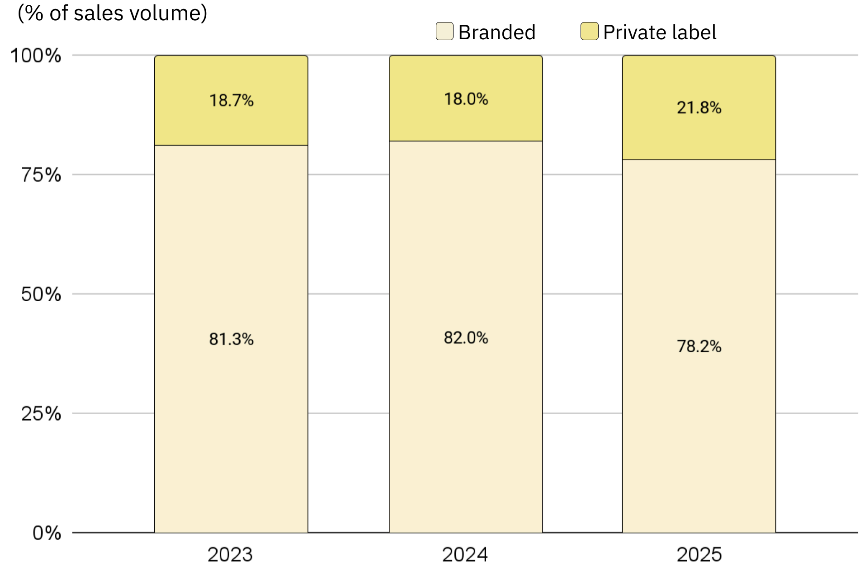
Branded products make up the majority of the plant-based market, possibly because the category is still young in France.

However, private-label plant-based meat products made some progress in 2025 – representing 21.8% of sales volume, up from 18.0% in 2024.

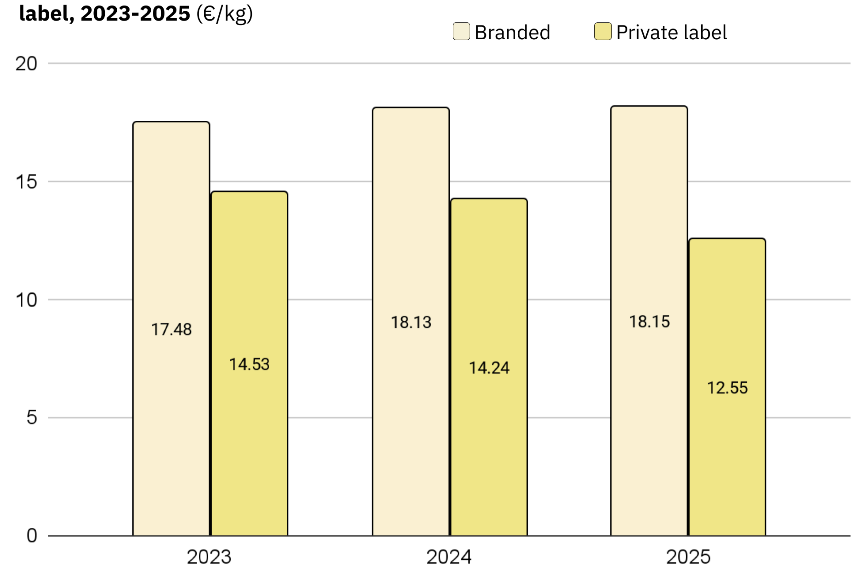
In terms of absolute sales volume, branded products grew 11% in 2025 and private-label products grew 41%.

Private-label products have become more affordable than branded products over time: they were 17% cheaper per kg in 2023, and 31% cheaper by 2025.

France chilled plant-based meat sales by branded or private label, 2023-2025
(% of sales volume)



Average price per kg of chilled plant-based meat in France, by branded or private label, 2023-2025 (€/kg)

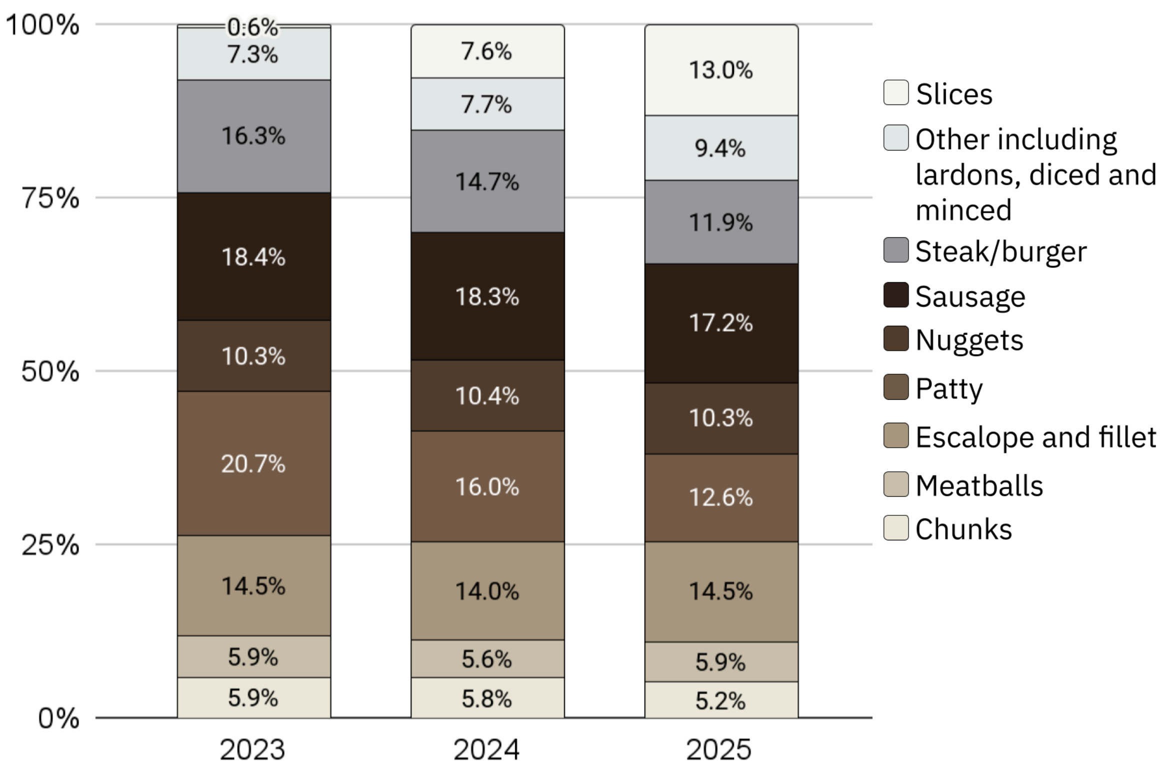


Product format breakdown

There is a wide range of plant-based meat formats available in the French market, led by sausages (17.2% of sales volume in 2025), escalope and fillet (14.5%), and slices (13.0%).

Slices saw rapid growth, from less than 1% of sales volume in 2023 to 13% in 2025. Patties, meanwhile, fell from 20.7% of sales volume in 2023 to 12.6% in 2025.

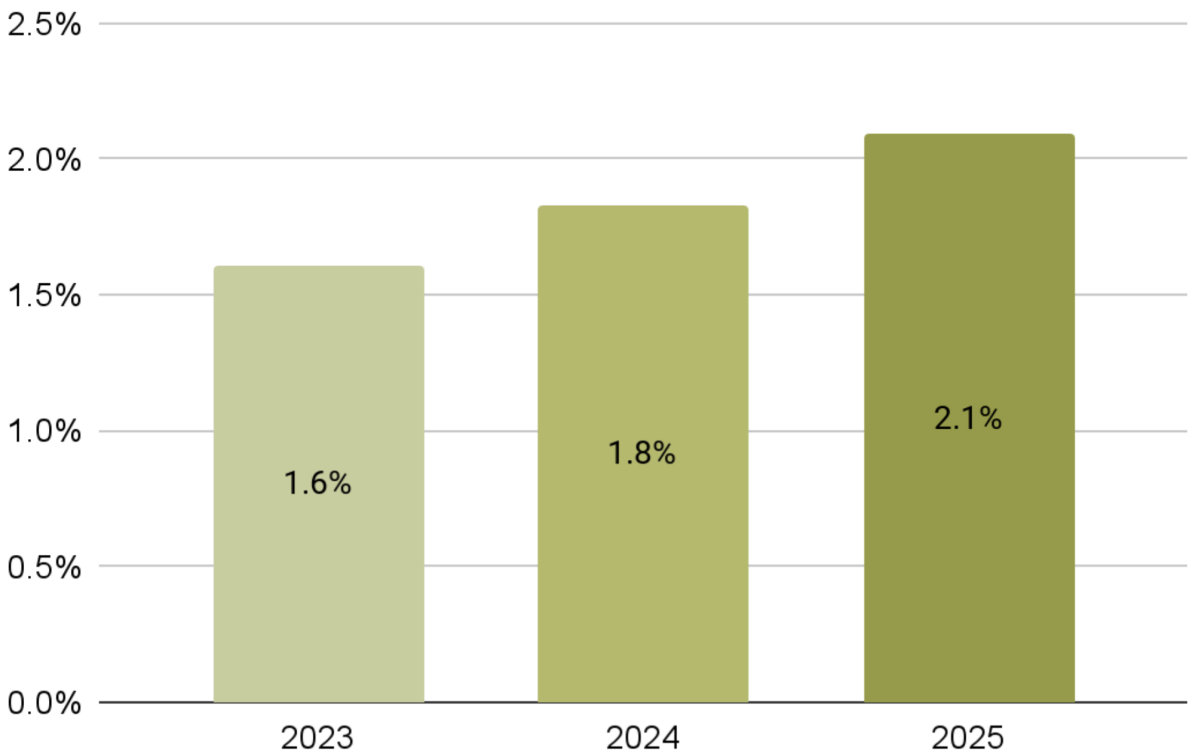
France chilled plant-based meat sales by type, 2023-2025 (% of sales volume)



Market share

Plant-based meat's market share, as a percentage of the overall sales volume of plant-based and animal-based chilled pre-packaged meat products, rose from 1.6% in 2023 to 2.1% in 2025. This pattern confirms the status of plant-based meat as an emerging but still niche category. Chilled animal-based meat sales volume remained roughly steady over this time period.

Plant-based meat: share of France's total (plant- and animal-based) chilled pre-packaged meat market, 2023-2025 (% of sales volume)

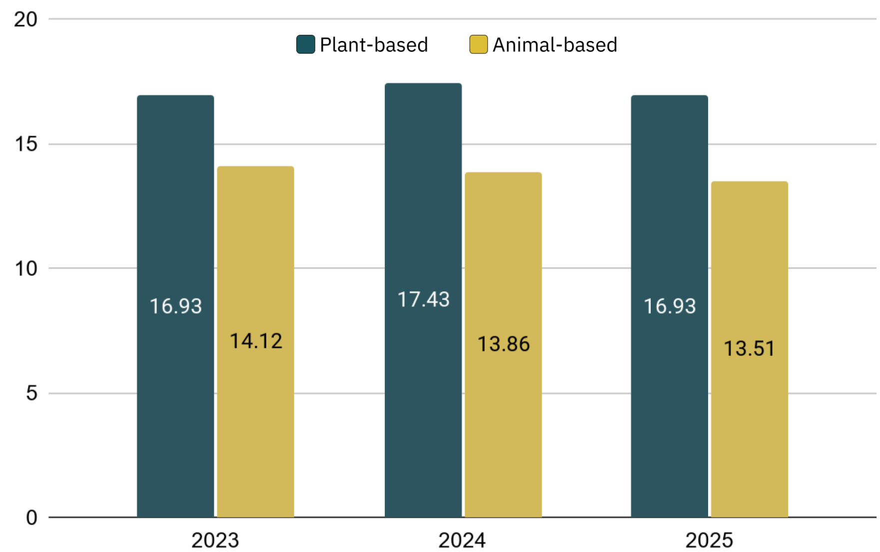


Price trends relative to animal equivalent

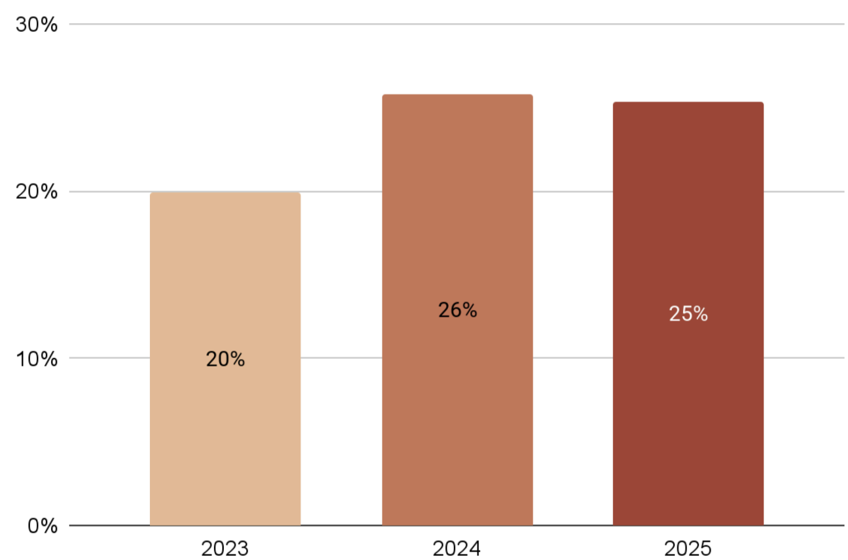
The price premium of plant-based meat compared to animal-based meat rose from 20% per kg in 2023 to 25% in 2025, driven mainly by the falling price of animal-based meat.

The average price per kg of plant-based meat rose in 2024, but fell back to its 2023 level in 2025.

Average price per kg for plant-based and animal-based chilled meat in France, 2023-2025 (€/kg)



Price difference for chilled plant-based meat compared to chilled animal-based meat in France, 2023-2025 (% difference based on €/kg)



Spotlight on tofu, tempeh and seitan

Total market

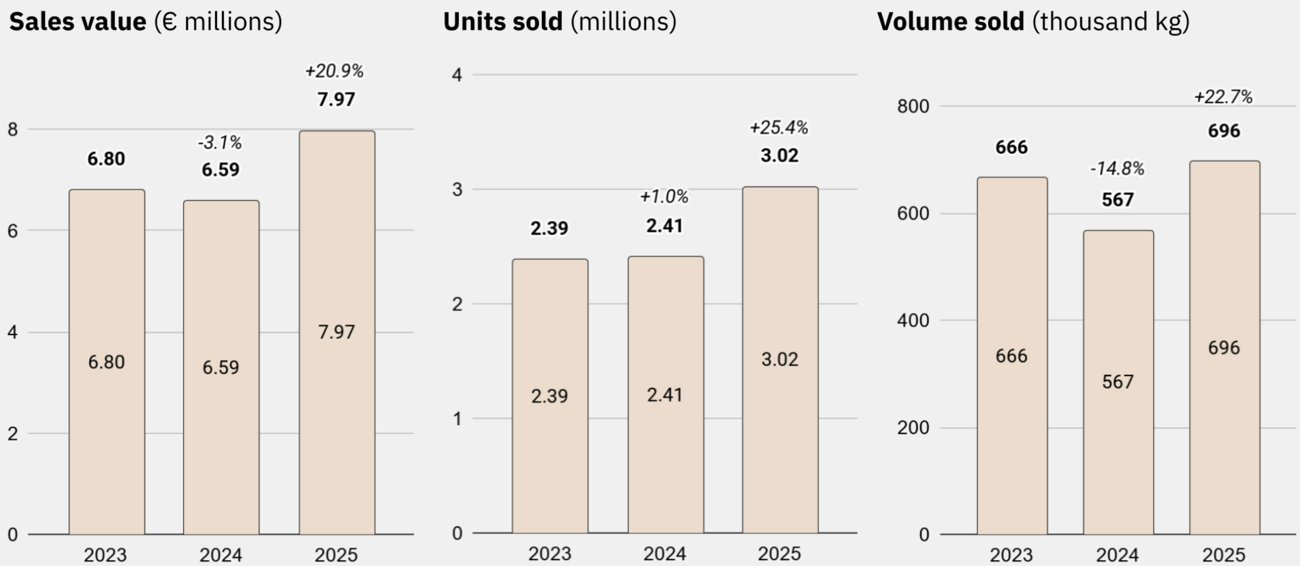
Tofu, tempeh and seitan[2] are not classed as plant-based meat in this report. This is because, in the French market, these products are not typically positioned as direct substitutes that aim to replicate the taste or texture of meat, in contrast to the newer wave of innovative plant-based meats that have grown in popularity over the past decade or so. However, they provide an interesting case study to compare with sales trends of plant-based meats that do aim to replicate the taste or format of meat.

The combined annual sales value of tofu, tempeh and seitan rose by 20.9% to €7.97 million in 2025, following a 3.1% dip in 2024. Unit sales rose by 25.4% to 3.02 million in 2025, after remaining level in 2024. Sales volume rose 22.7% to 696,000 kg in 2025, following a 14.8% dip in 2024.

While growth rates for tofu, tempeh and seitan exceeded those of plant-based meat in 2025, they notably started from a much lower base. By volume, French consumers bought 14.5 times more plant-based meat than these categories combined in 2025.

The graphs below show aggregated values, as tofu represented over 99% of the value.

Tofu, seitan and tempeh sales in France, 2023-2025

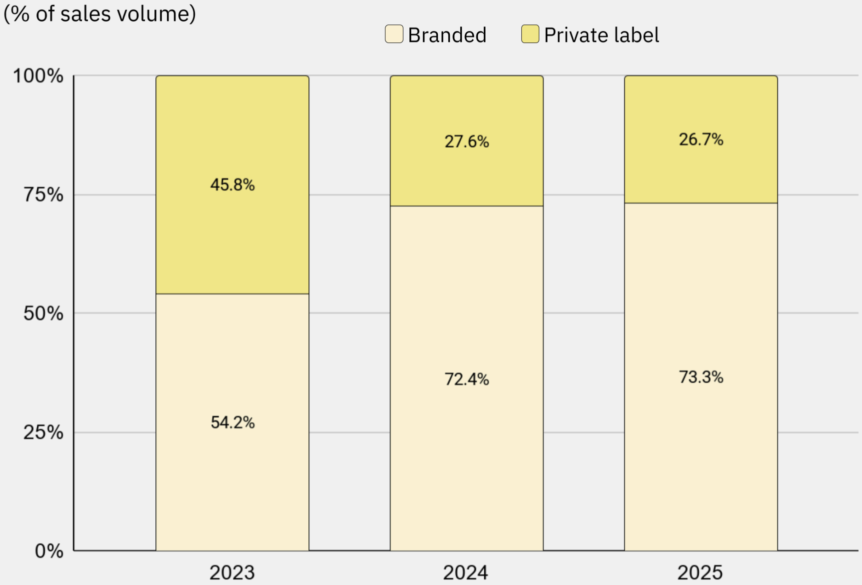


[2] Tofu is a product originating in China over 2,000 years ago, made from soy milk curds. Tempeh is a traditional Indonesian product made from fermented soybeans. Seitan is made from wheat gluten and historically used in various Asian cuisines.

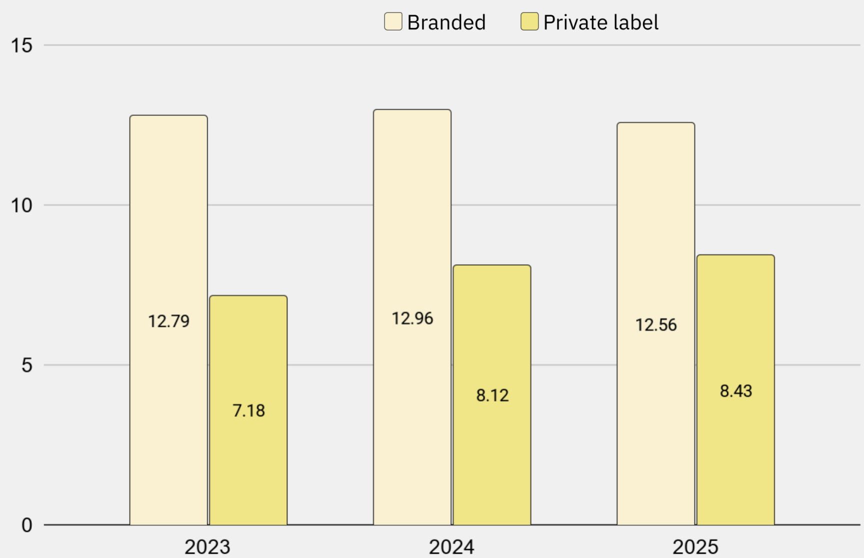
Branded versus private label

The market share of private-label products fell from 45.8% of the combined sales volume of tofu, tempeh and seitan in 2023 to 26.7% in 2025, despite private-label products being, on average, 33% cheaper per kg in 2025.

France tofu, tempeh and seitan sales by branded or private label, 2023-2025
(% of sales volume)



Average price per kg of tofu, tempeh and seitan in France, by branded or private label, 2023-2025 (€/kg)



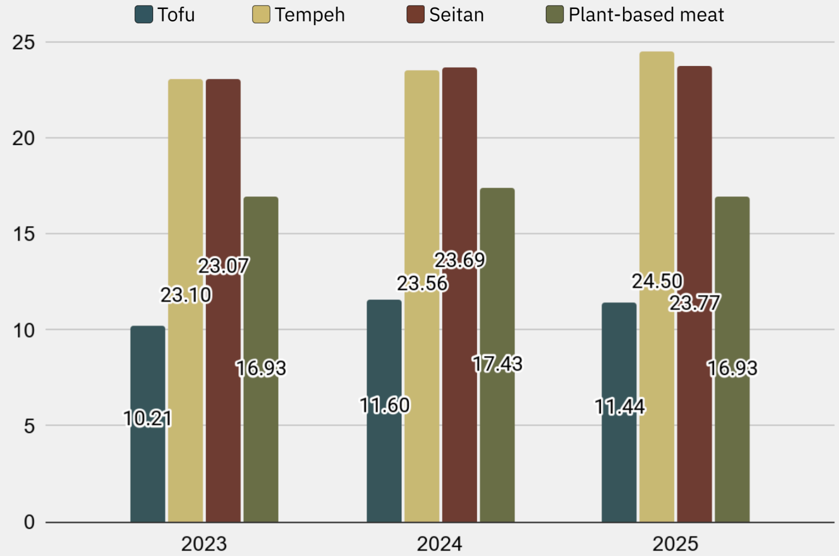
Price trends

Tofu was the cheapest product in this category. At €11.44/kg in 2025, it was 32% cheaper than plant-based meat.

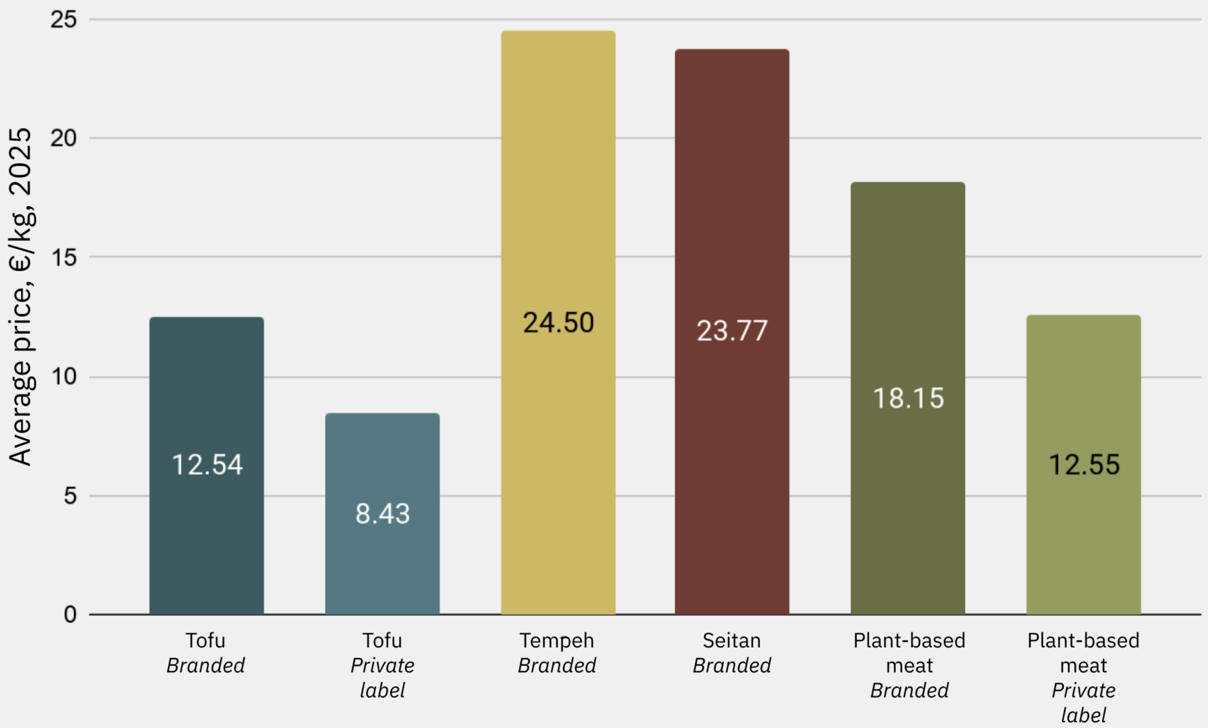
Private-label tofu was even cheaper, at €8.43/kg in 2025.

Tempeh and seitan were both considerably more expensive than tofu and plant-based meat, but their market size was tiny in comparison.

Average price per kg for tofu, tempeh, seitan and plant-based meat in France, 2023-2025 (€/kg)



Average price per kg for tofu, tempeh, seitan and plant-based meat segments in France, by branded or private label, 2025 (€/kg)



Plant-based milk and drinks

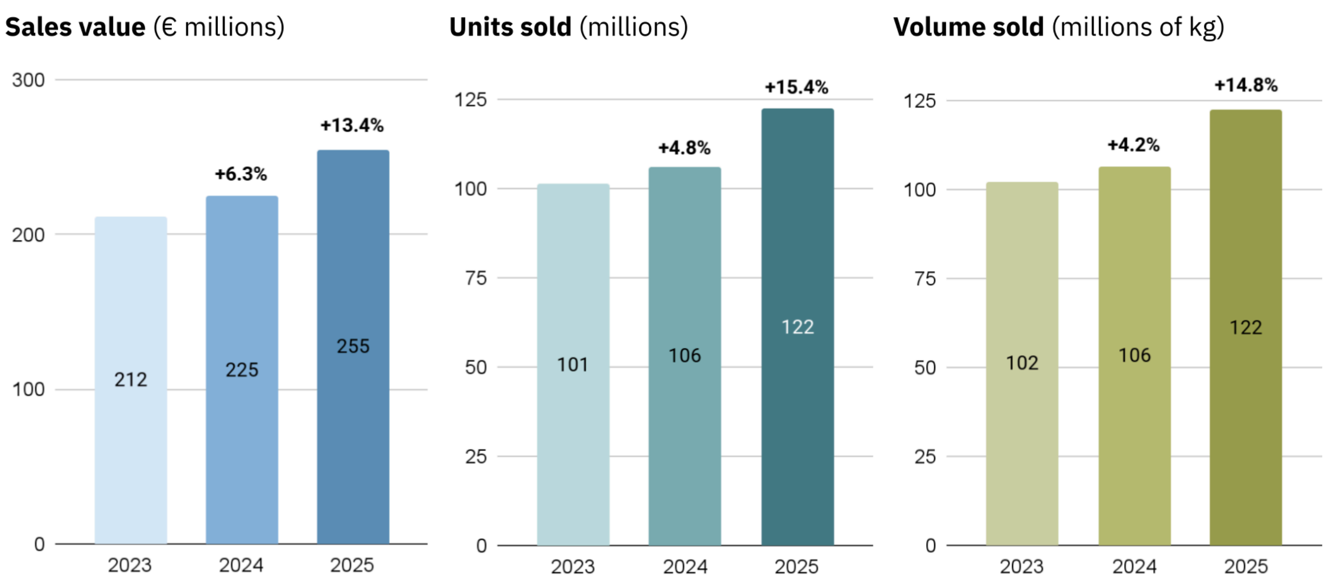
Total market

Demand for plant-based milk and drinks accelerated in France.

Annual sales value reached €255 million in 2025, up by 13.4% from 2024 and up by 20.6% from 2023. Unit sales rose by 15.4% to 122 million in 2025, up by 21.0% from 2023. Sales volume reached 122 million kg in 2025, 14.8% higher than in 2024 and 19.7% higher than in 2023.

The annual rate of growth increased across value, units and volume in 2025. This increase, despite the price of plant-based milk and drinks remaining roughly level and the price premium relative to animal-based milk falling only slightly, indicates strong and growing demand.

Plant-based milk and drinks sales in France, 2023-2025

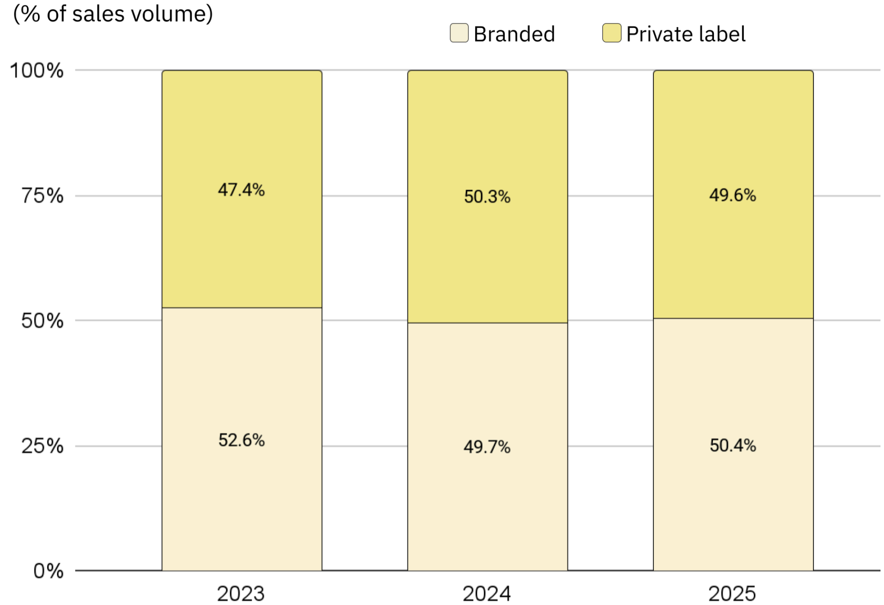


Branded versus private label

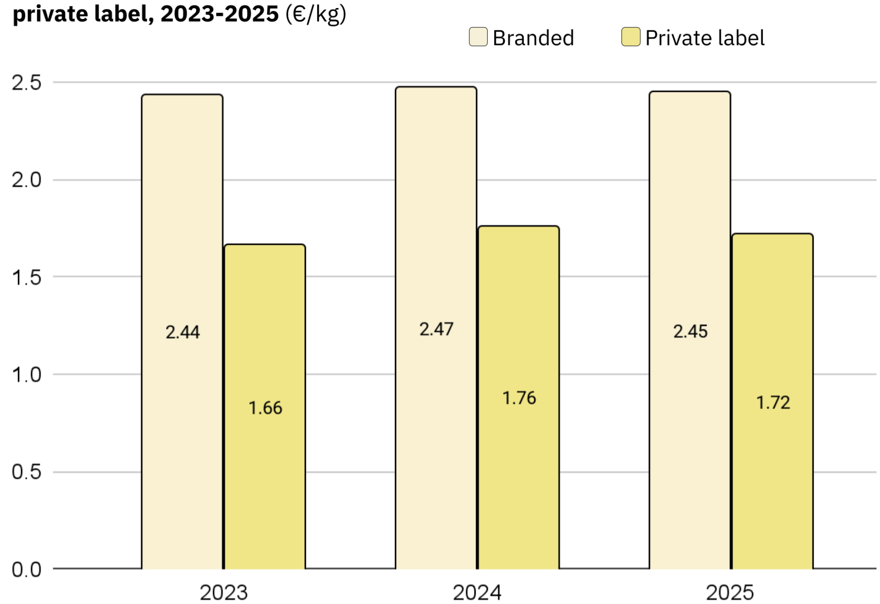
Private-label products consistently accounted for roughly half of sales volume between 2023 and 2025.

Private-label products were on average 30% cheaper per litre than branded products in 2025.

France plant-based milk and drinks sales by branded or private label, 2023-2025 (% of sales volume)



Average price per kg of plant-based milk and drinks in France, by branded or private label, 2023-2025 (€/kg)



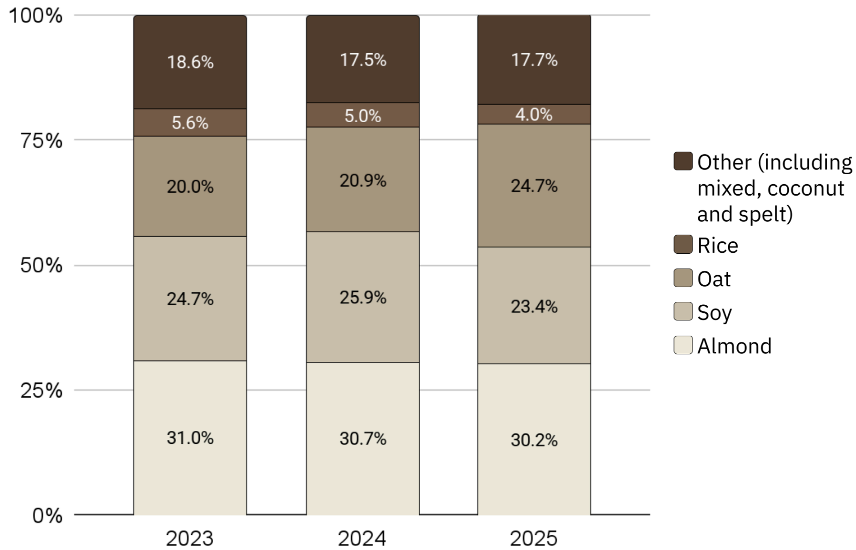
Product format breakdown

France has a diverse range of plant-based milk and drink types, led in 2025 by almond (30.2% of sales volume), oat (24.7%) and soy (23.4%).

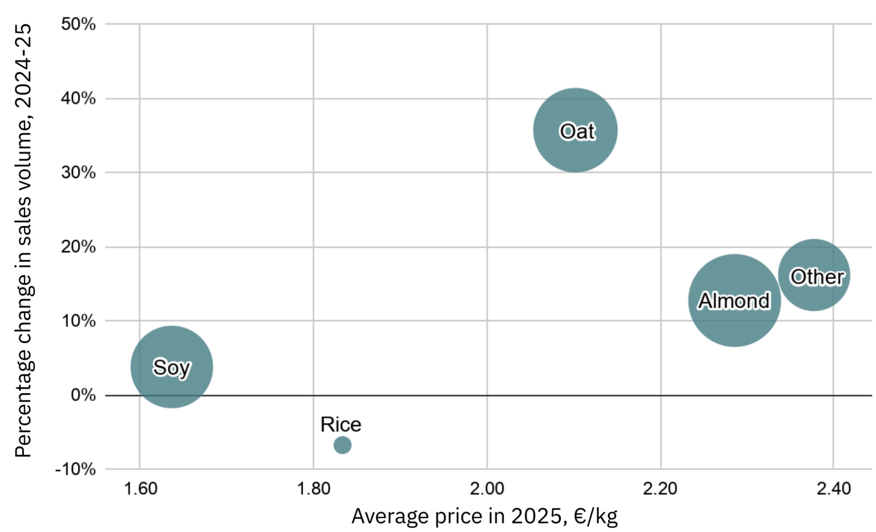
The strongest growth in 2025 was in oat-based milk and drinks, which saw sales volume rise by 36%.

In 2025, the segments that cost more per litre generally saw higher sales volume growth, although oat, at €2.10/kg, had a mid-tier price point and also the strongest growth. This pattern suggests that affordability was not the main driver of growth in 2025.

France plant-based milk and drinks sales by base ingredient, 2023-2025
(% of sales volume)



Average price versus sales volume change, plant-based milk by base ingredient*, France

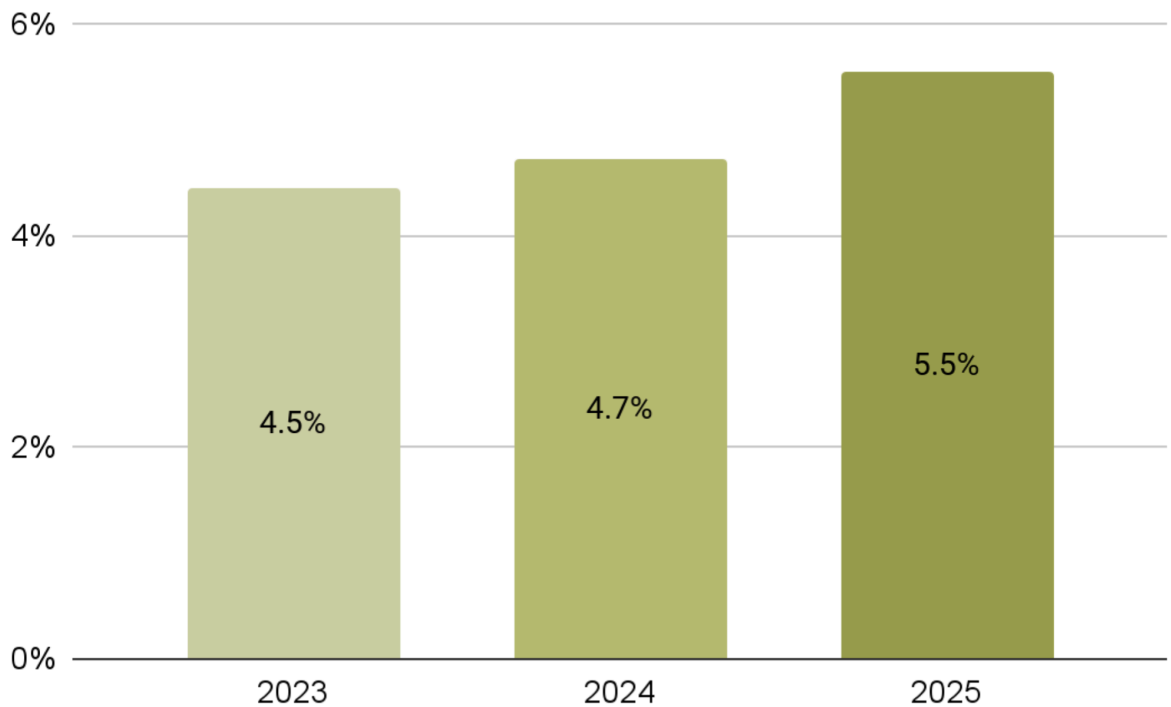


**Bubble size represents sales volume in 2025.*

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] rose from 4.5% in 2023 to 5.5% in 2025. This was driven by both rising plant-based sales and falling sales of animal-based milk (down 5% between 2023 and 2025).

Plant-based milk and drinks: share of France's total (plant- and animal-based) milk and drinks market, 2023-2025 (% 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

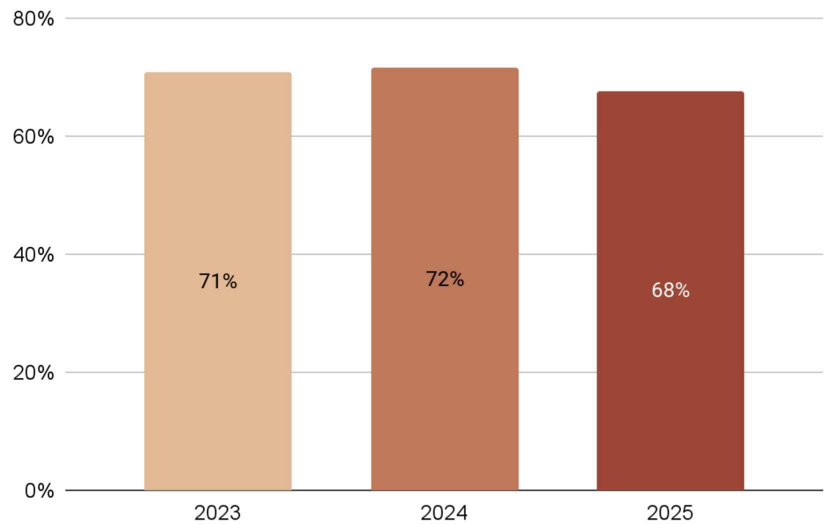
Plant-based milk and drinks remained roughly constant in price between 2023 and 2025. They carried a considerable price premium compared with animal-based milk, at 68% more expensive per litre in 2025 (down from 72% in 2024).

The price gap was more pronounced in the branded segment, where plant-based milk and drinks were 70% more expensive per litre than branded animal-based milk in 2025.

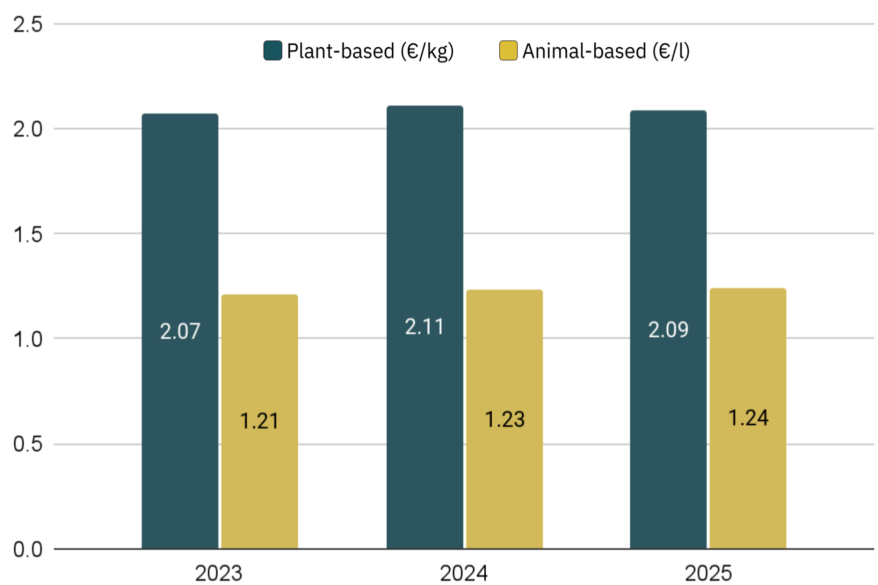
Private-label plant-based products, meanwhile, were 54% more expensive per litre than private-label animal-based milk in 2025.

The cheapest plant-based segment in 2025 was private-label soy, which at €1.16/l was just 4% more expensive than private-label animal-based milk. Despite this low price, it also had the lowest growth in sales volume among the major plant-based segments, rising just 1.0% in 2025, indicating that affordability is not sufficient to achieve strong growth.

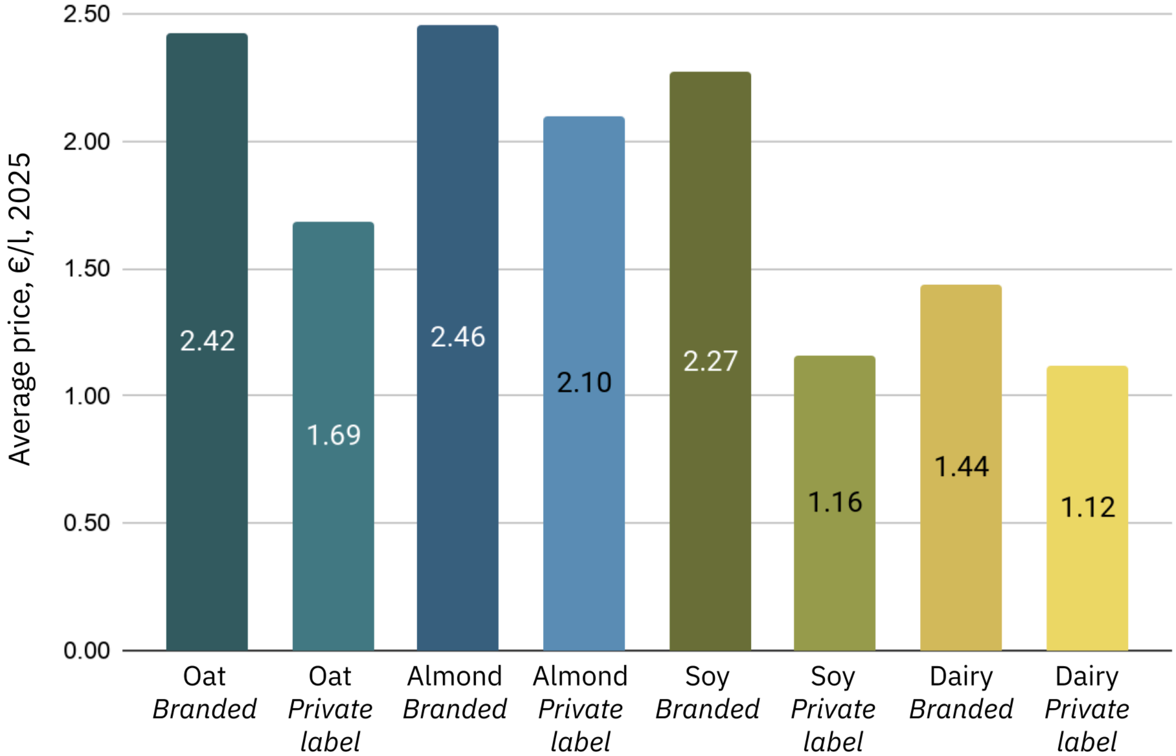
Price difference for plant-based milk and drinks compared to animal-based milk and drinks in France, 2023-2025 (% difference based on €/l or €/kg)



Average price per litre for plant-based and animal-based milk and drinks in France, 2023-2025 (€/l or €/kg)



Average price per litre for selected plant-based and animal-based milk and drinks in France, by branded or private label, 2025 (€/l)



Plant-based cheese

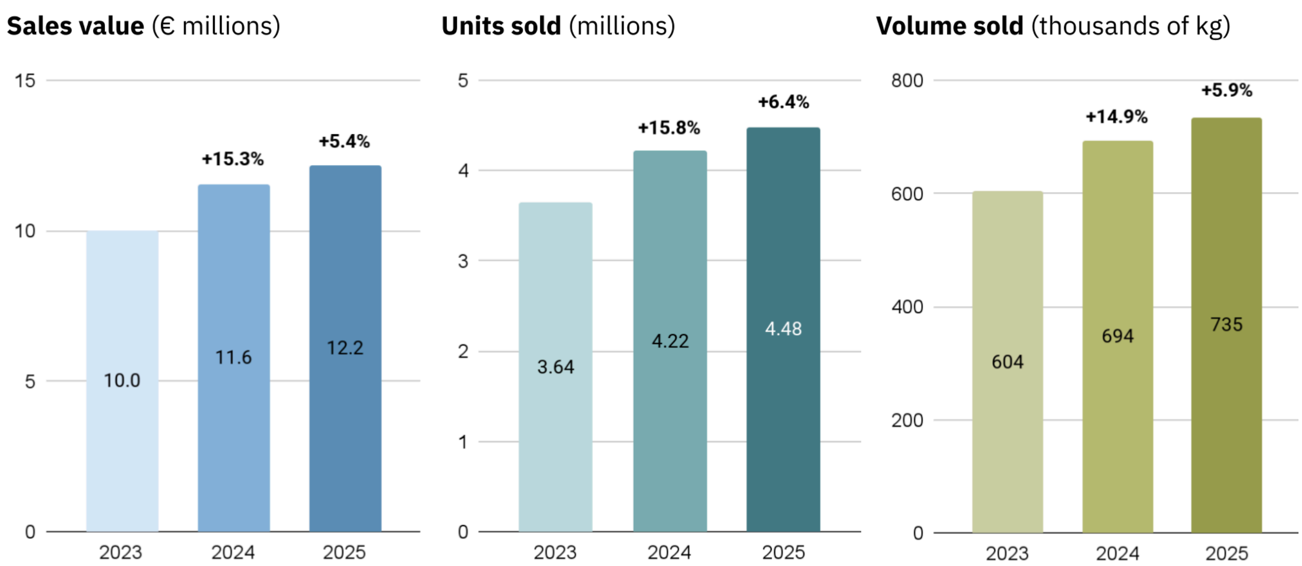
Total market

The market for plant-based cheese in France continued to grow in 2025, but the growth rate was lower than in 2024.

Annual sales value was €12.2 million in 2025, up by 5.4% since 2024 and up by 21.5% since 2023. Unit sales were 4.48 million in 2025, 6.4% higher than in 2024 and 23.2% higher than in 2023. Sales volume rose by 5.9% to 735,000 kg in 2025, up by 21.7% since 2023.

The slowing growth rate, despite plant-based cheese remaining a tiny proportion of all cheese sales in France, suggests there is a risk of the market levelling out while it is still a niche category. To reach mainstream consumers, manufacturers must continue to develop their products to meet taste, price and nutritional expectations.

Plant-based cheese sales in France, 2023-2025

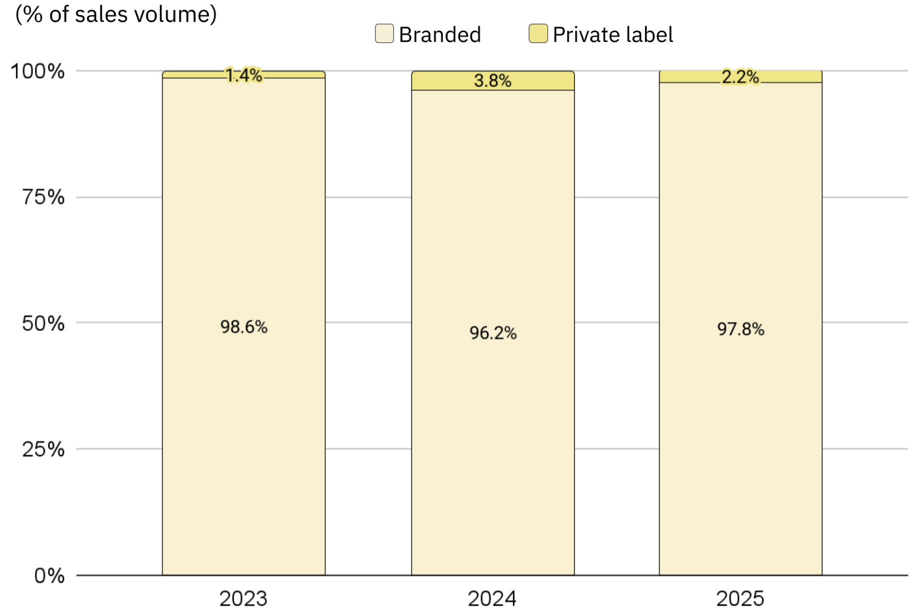


Branded versus private label

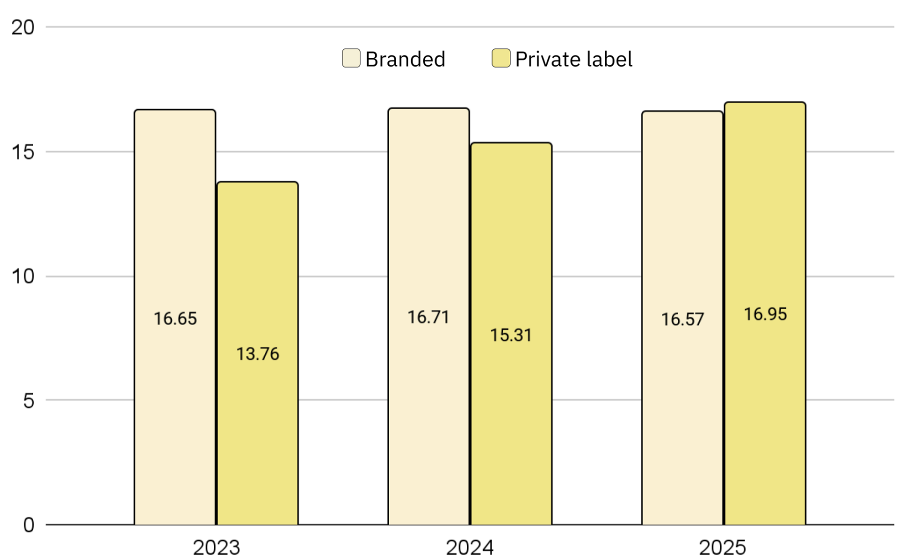
Private-label plant-based cheese products accounted for just 2.2% of sales volume in 2025.

Unlike in the other categories covered in this report, these options were slightly more expensive per kg than branded products in 2025.

France plant-based cheese sales by branded or private label, 2023-2025
(% of sales volume)



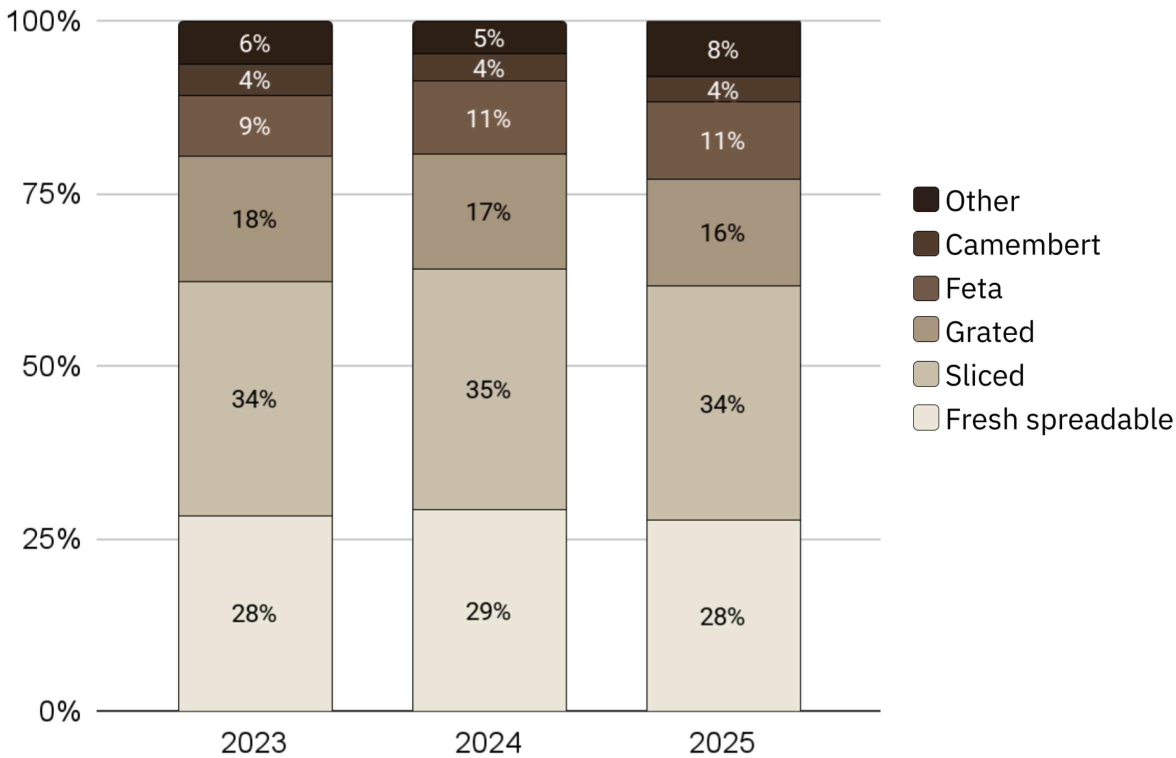
Average price per kg of plant-based cheese in France, by branded or private label, 2023-2025 (€/kg)



Product format breakdown

The top plant-based cheese formats in 2025 were sliced (34% of sales volume), fresh spreadable (28%) and grated (16%).

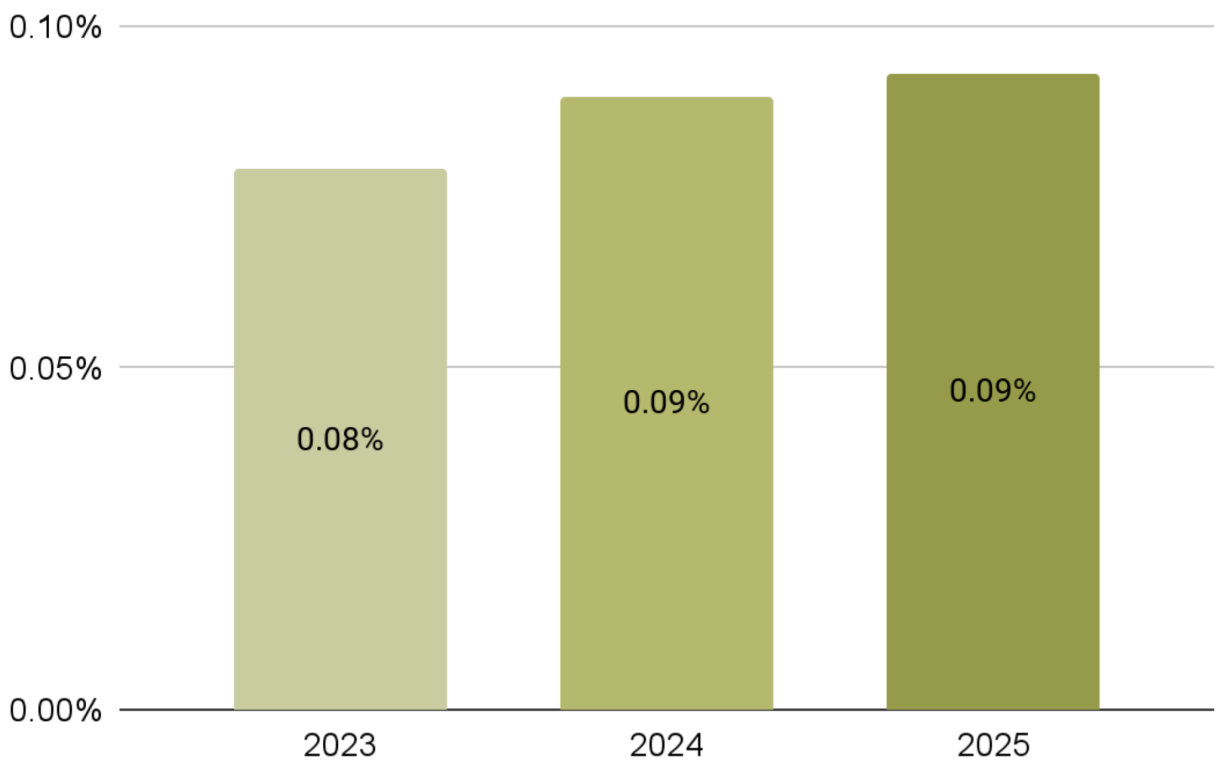
France plant-based cheese sales by type, 2023-2025 (% of sales volume)



Market share

Plant-based cheese's market share, as a percentage of the sales volume of all plant- and animal-based cheese, was just 0.09% in 2025. Animal-based cheese sales volume remained roughly steady during 2025. France has one of the highest per capita rates of dairy cheese consumption, and plant-based cheese has not yet become a mainstream option.

Plant-based cheese: share of France's total (plant- and animal-based) cheese market, 2023-2025 (% of sales volume)



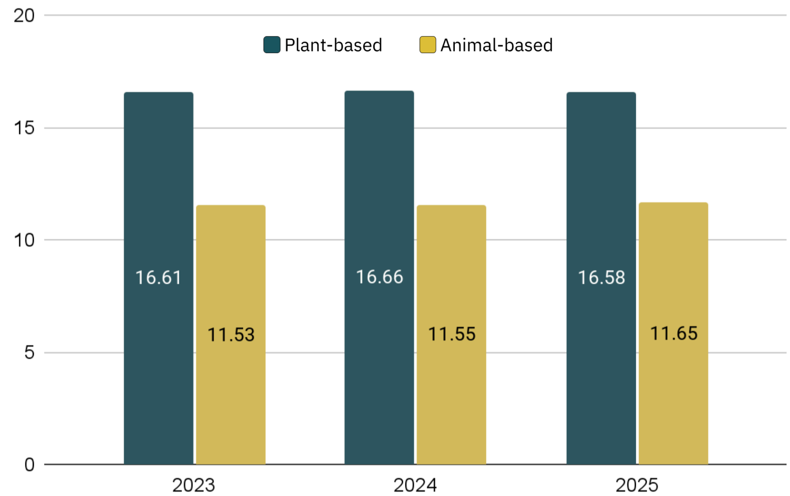
Price trends relative to animal equivalent

Plant-based cheese was 42% more expensive per kg than animal-based cheese in 2025, down slightly from 44% in 2023 and 2024.

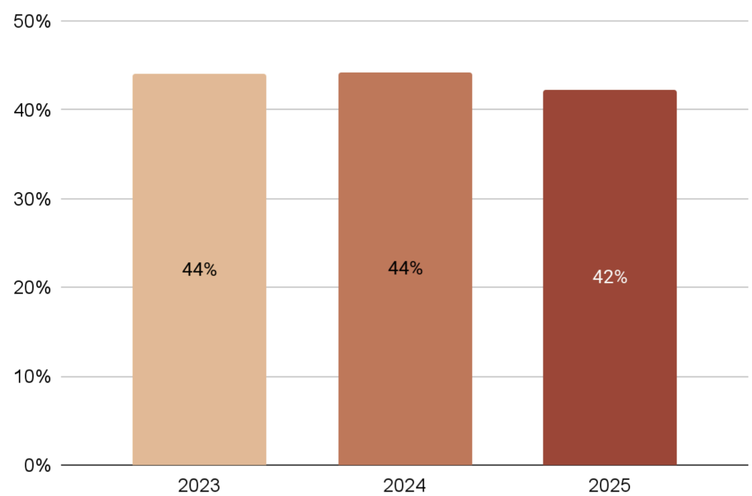
The price gap for branded products was lower: plant-based options were 21% more expensive in 2025.

In contrast, private-label plant-based cheese was 68% more expensive than private-label animal-based cheese in 2025.

Average price per kg for plant-based and animal-based cheese in France, 2023-2025 (€/kg)



Price difference for plant-based cheese compared to animal-based cheese in France, 2023-2025 (% difference based on €/kg)



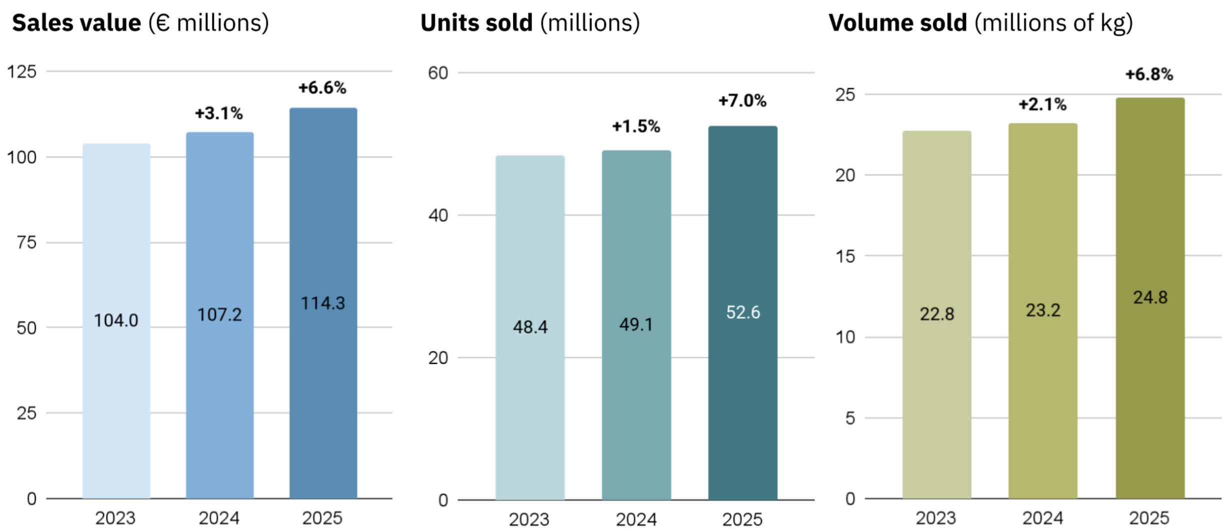
Plant-based yoghurt

Total market

Sales of plant-based yoghurt in France accelerated between 2024 and 2025.

Annual sales value reached €114 million in 2025 – a rise of 6.6% since 2024 and a rise of 9.8% since 2023. Unit sales increased 7.0% in 2025 to 52.6 million, up by 8.6% since 2023. Sales volume was 24.8 million kg in 2025 – up by 6.8% from 2024 and up by 9.0% from 2023.

Plant-based yoghurt sales in France, 2023-2025



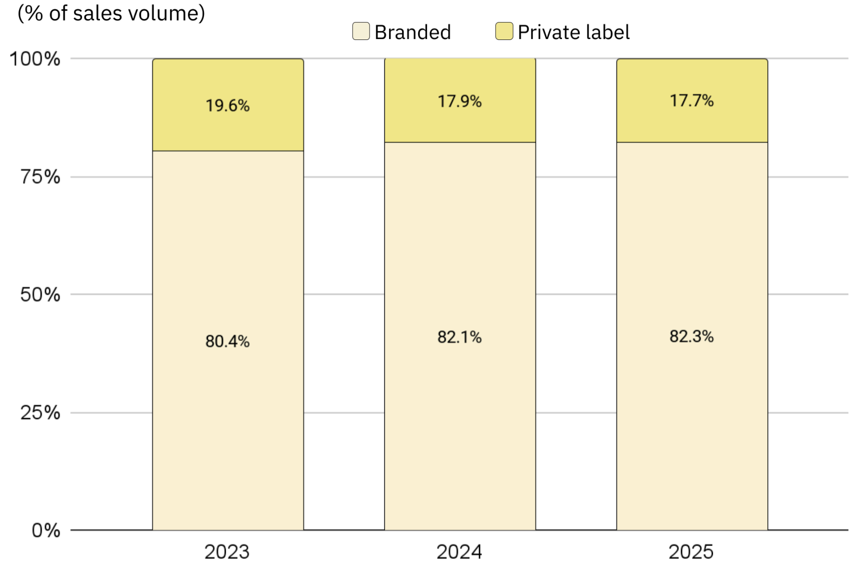
Branded versus private label

Private-label plant-based yoghurt accounted for 19.6% of sales volume in 2023, falling to 17.7% by 2025.

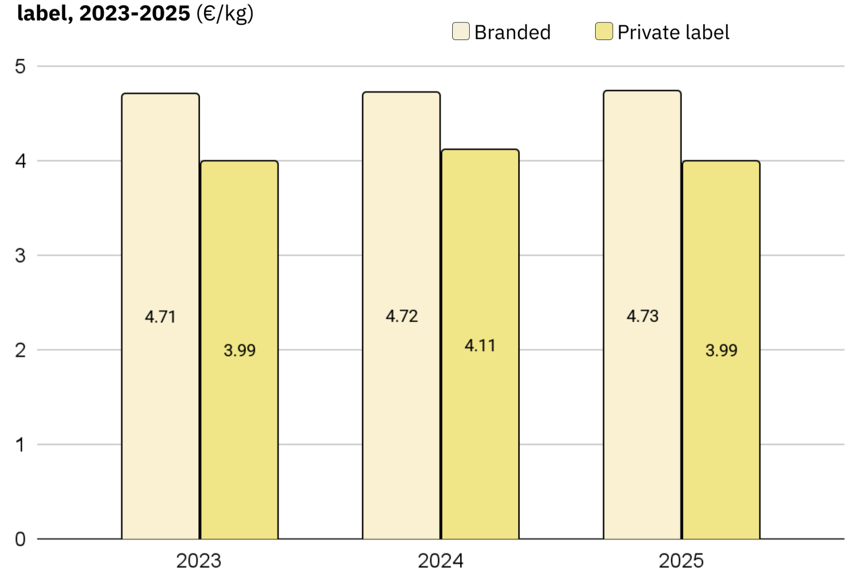
While branded products saw sales volume rise in both 2024 and 2025, private-label sales volume dipped in 2024 before rising again.

Private-label products were 16% cheaper per kg than branded products in 2025.

France plant-based yoghurt sales by branded or private label, 2023-2025
(% of sales volume)



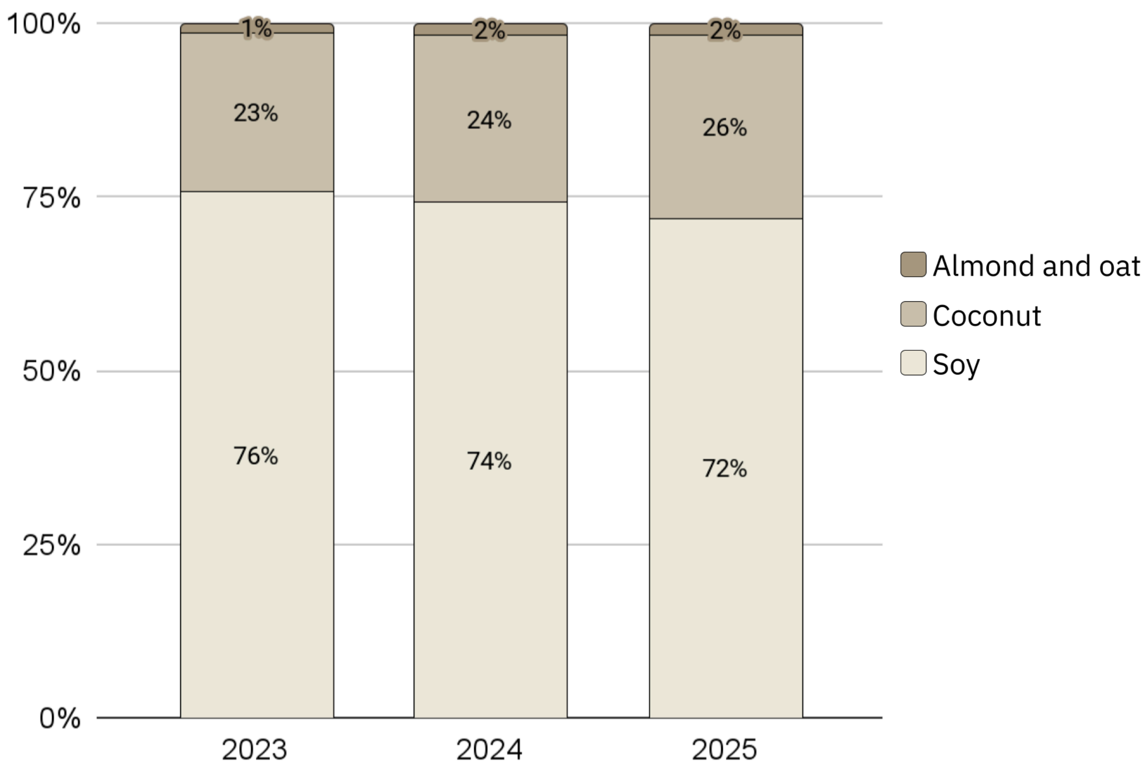
Average price per kg of plant-based yoghurt in France, by branded or private label, 2023-2025 (€/kg)



Product format breakdown

The majority of plant-based yoghurts in France were made from soy (72% of sales volume in 2025), although this proportion fell slightly between 2023 and 2025. There was some growth in coconut yoghurt's market share.

France plant-based yoghurt sales by type, 2023-2025 (% of sales volume)

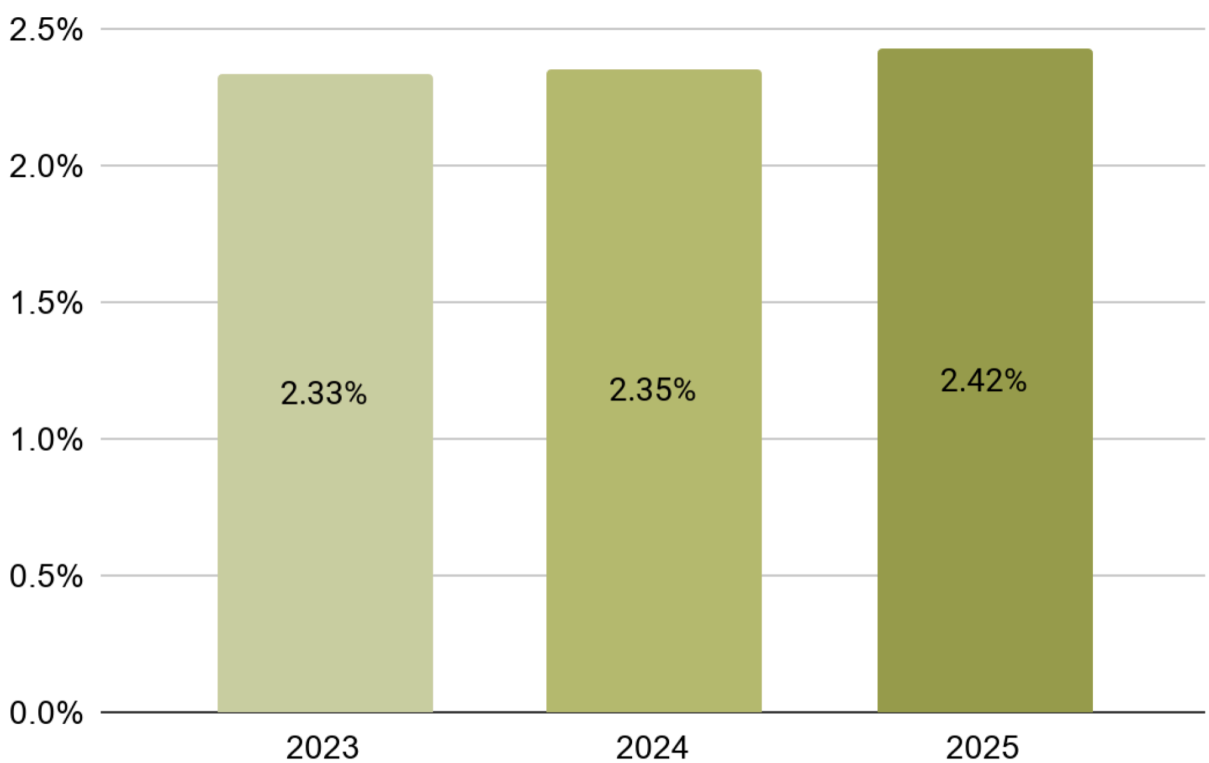


Market share

The market share of plant-based yoghurt, as a percentage of overall plant- and animal-based yoghurt sales volume in France, increased slightly to 2.42% in 2025, but remains low.

Between 2023 and 2025, the sales volume of plant-based yoghurt rose by 2 million kg, while that of animal-based yoghurt rose by 45 million kg, showing an overall increase in demand for yoghurt.

Plant-based yoghurt: share of France's total (plant- and animal-based) yoghurt market, 2023-2025 (% of sales volume)



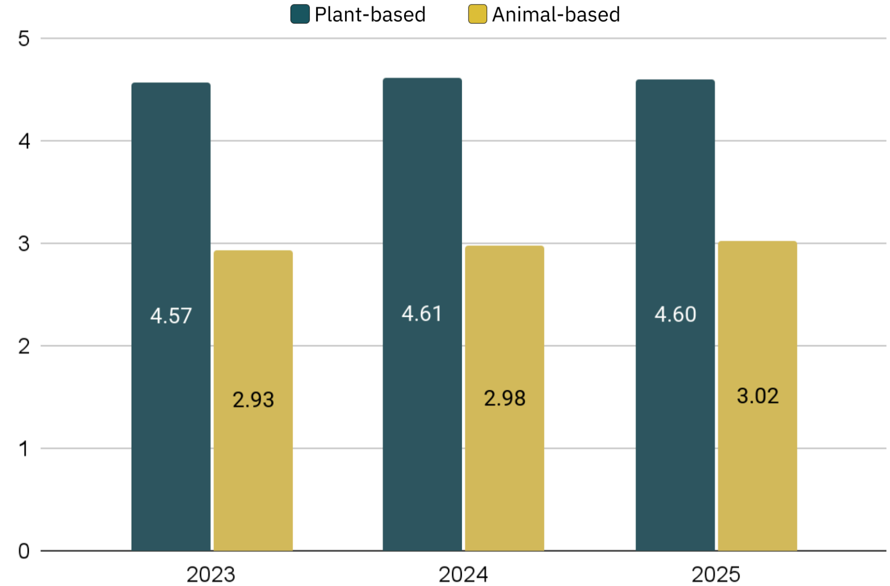
Price trends relative to animal equivalent

Plant-based yoghurt carried a premium relative to animal-based yoghurt. However, the price gap fell from 56% per kg in 2023 to 53% in 2025.

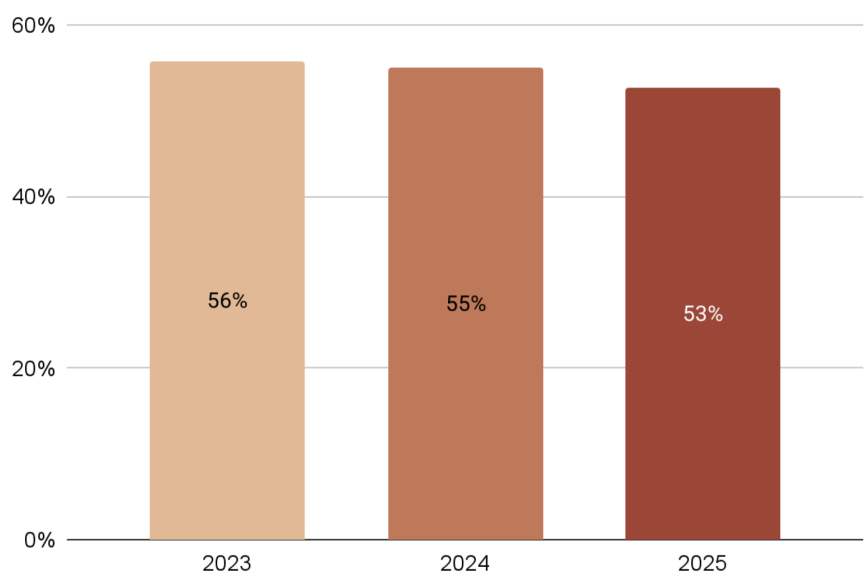
Branded plant-based yoghurts were only 24% more expensive per kg than branded animal-based yoghurts in 2025.

The price gap was more pronounced in the private-label segment, where plant-based options were 78% more expensive per kg in 2025.

Average price per kg for plant-based and animal-based yoghurt in France, 2023-2025 (€/kg)



Price difference for plant-based yoghurt compared to animal-based yoghurt in France, 2023-2025 (% difference based on €/kg)



Plant-based cream

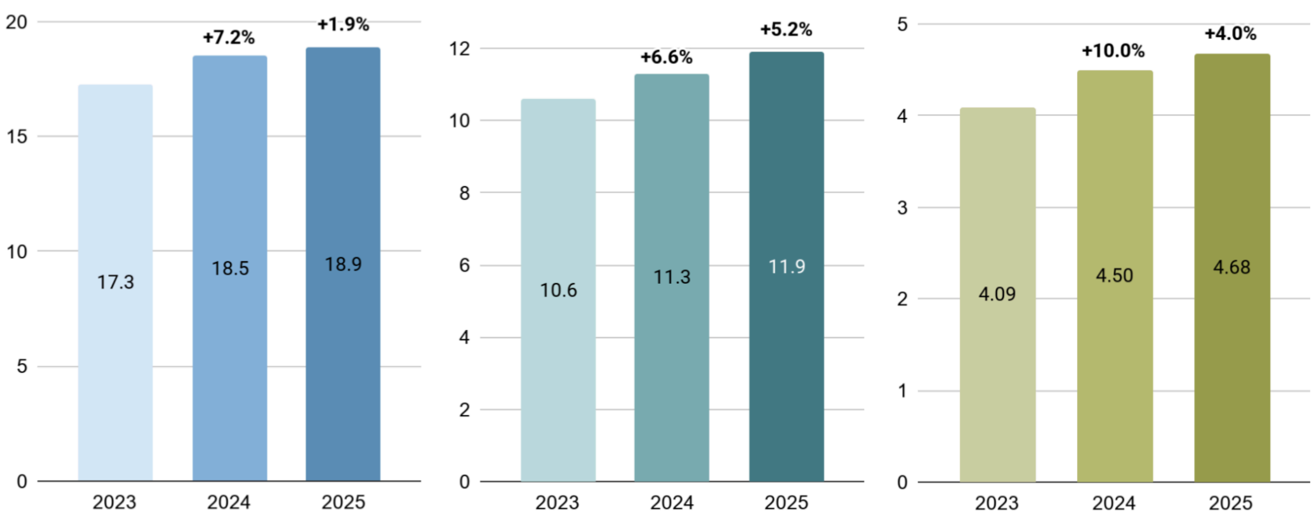
Total market

The market for plant-based cream[4] in France continued to grow in 2025, but the rate of growth was lower than in 2024.

Annual sales value rose by 1.9% to €18.9 million in 2025, an increase of 9.2% compared with 2023. Unit sales reached 11.9 million in 2025, up by 5.2% from 2024 and up by 12.2% from 2023. Sales volume rose by 4.0% to 4.68 million kg in 2025, up by 14.4% compared to 2023.

Plant-based cream sales in France, 2023-2025

Sales value (€ millions) **Units sold** (millions) **Volume sold** (millions of kg)



[4] The total for plant-based cream is lower than reported in the previous edition of this report. This is because coconut-based creams have been excluded this year, as most of the coconut-based creams available in France are positioned as traditional Asian-style cooking ingredients rather than as alternatives to dairy cream. The sales data does not permit only the dairy alternative coconut-based products to be isolated.

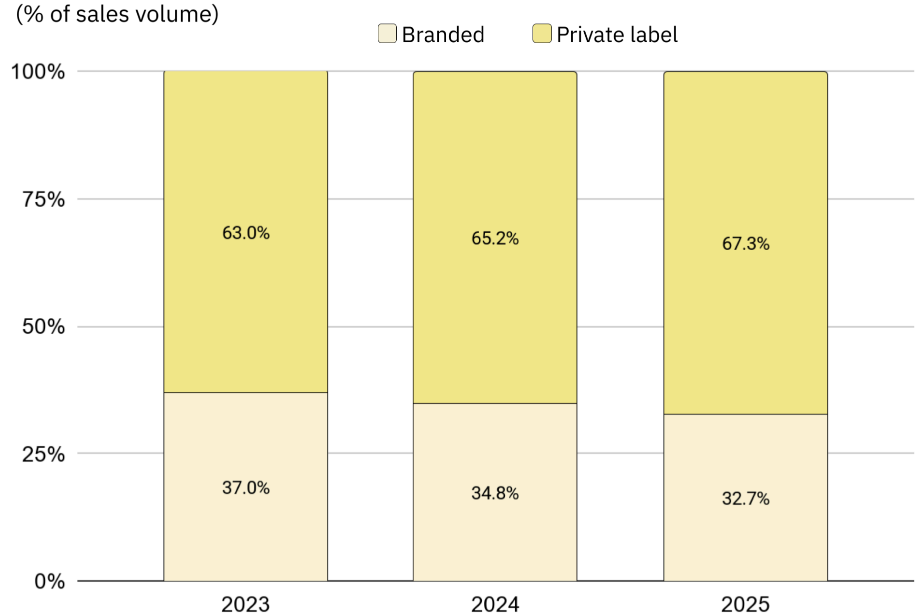
Branded versus private label

The market share of private-label products rose slightly between 2023 and 2025, reaching two-thirds of sales volume in 2025.

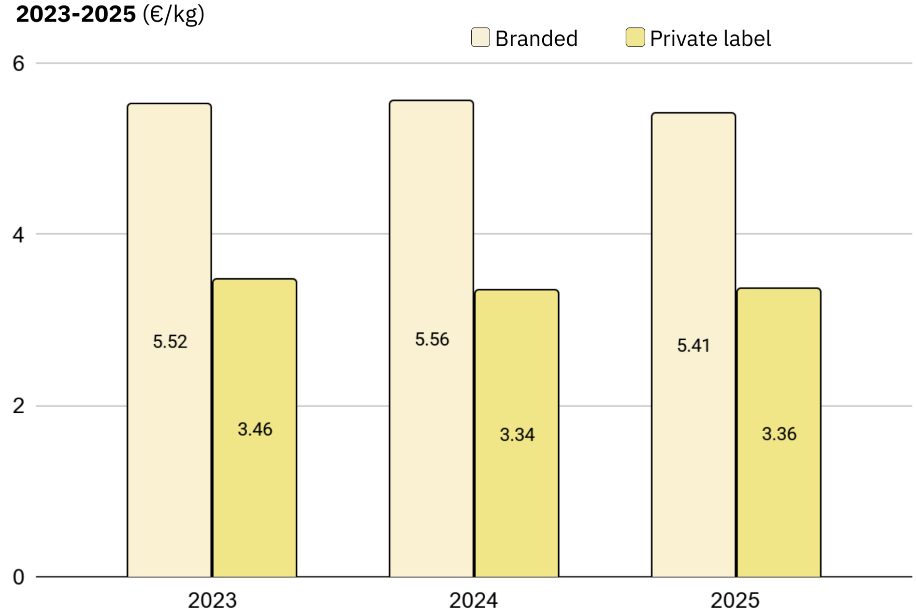
In 2025, branded sales volume fell 2.2% while private-label sales volume rose by 7.3%.

Private-label products had a significant price advantage, being 38% cheaper per kg in 2025.

France plant-based cream sales by branded or private label, 2023-2025
(% of sales volume)



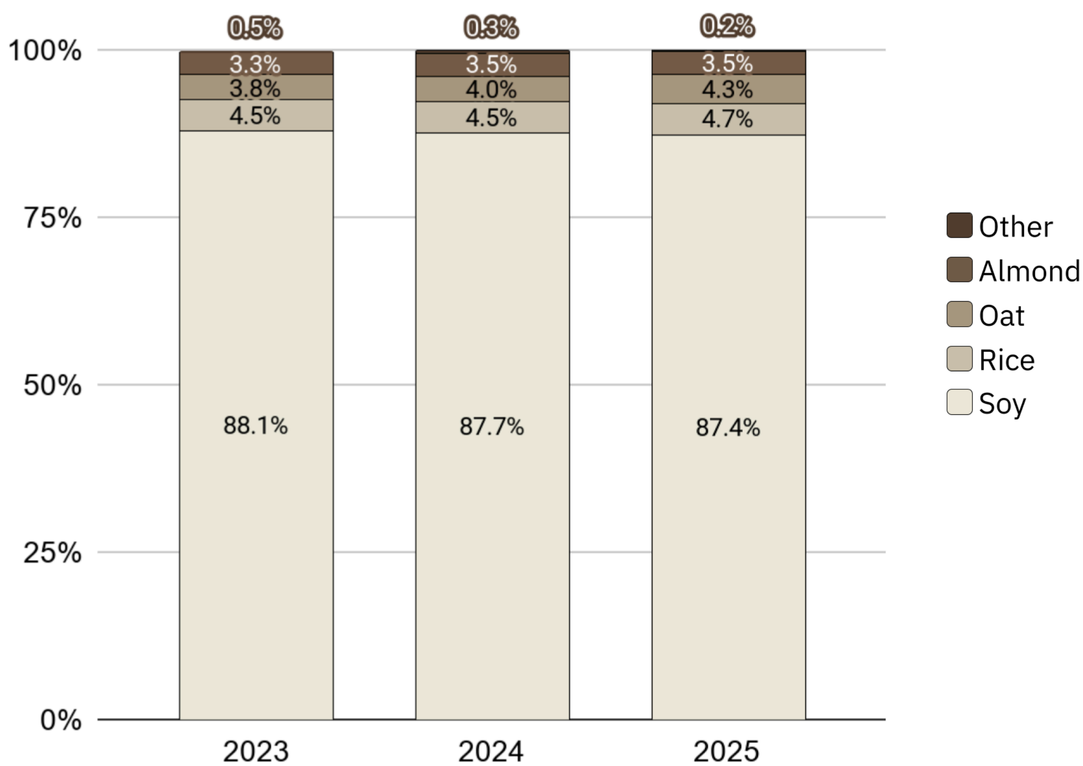
Average price per kg of plant-based cream in France, by branded or private label, 2023-2025 (€/kg)



Product format breakdown

Most plant-based cream products in France were made of soy, with small market shares for rice, oat and almond-based products. There was no major shift in their market shares between 2023 and 2025.

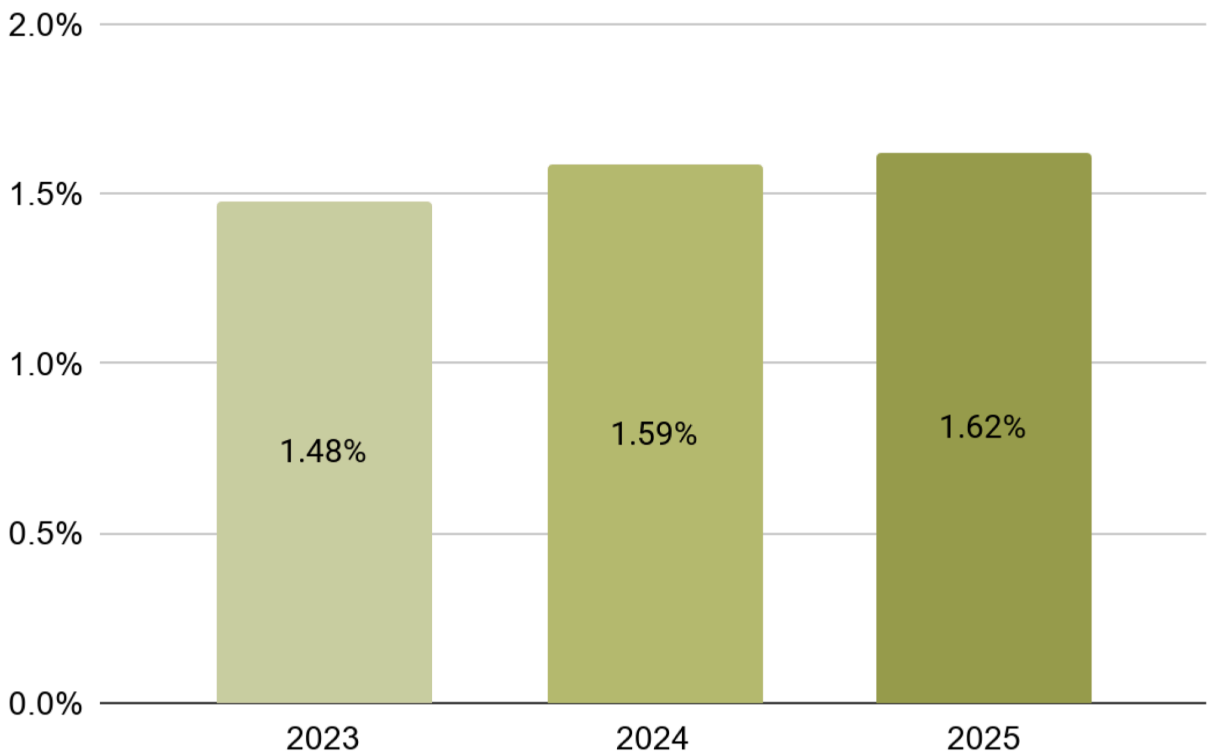
France plant-based cream sales by ingredient base, 2023-2025
(% of sales volume)



Market share

The market share of plant-based cream, as a share of overall sales volume of plant- and animal-based cream, rose slightly from 1.48% in 2023 to 1.62% in 2025. The sales volume of animal-based cream rose by 4% over this time.

Plant-based cream: share of France's total (plant- and animal-based) cream market, 2023-2025 (% of sales volume)



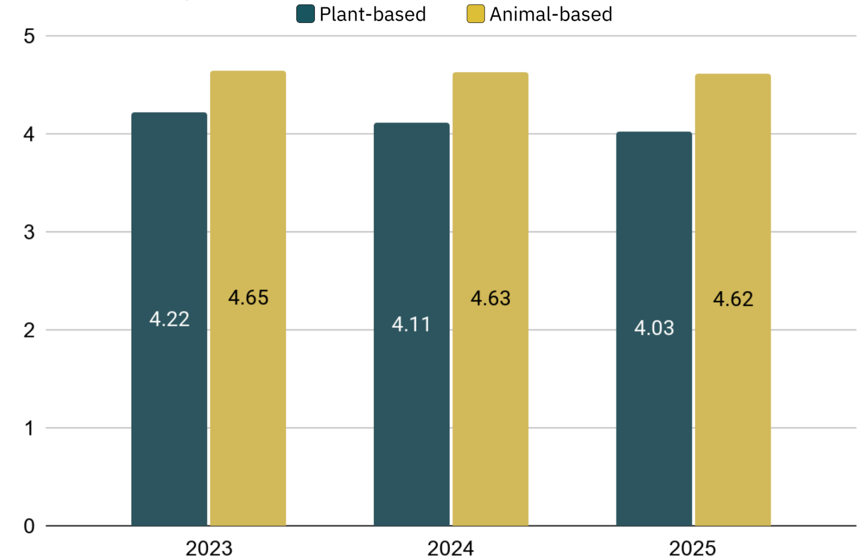
Price trends relative to animal equivalent

Plant-based cream was consistently cheaper per kg than animal-based cream. Its price advantage grew from 9% in 2023 to 13% in 2025, primarily caused by falling plant-based prices (while animal-based prices remained steady).

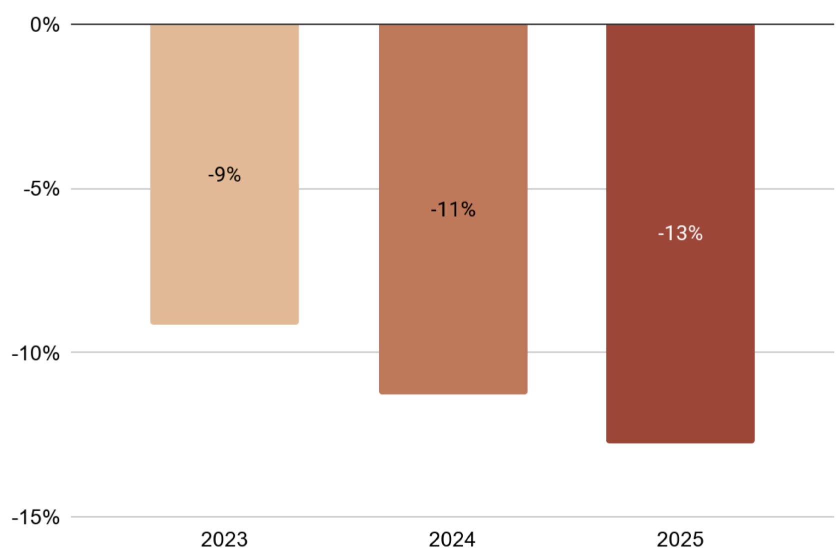
When comparing only private-label products, plant-based cream was 17% cheaper per kg in 2025.

In the branded segment, plant-based cream was 5% cheaper per kg in 2025.

Average price per kg for plant-based and animal-based cream in France, 2023-2025 (€/kg)



Price difference for plant-based cream compared to animal-based cream in France, 2023-2025 (% difference based on €/kg)



Closing remarks

Demand for plant-based food is accelerating in France, with growth across multiple product categories.

The strong growth in 2025 should be seen in the context of a relatively young plant-based market, with market shares relative to animal-based foods remaining low, particularly compared with some other European countries.

At this early stage, product performance appears to be an important factor driving sales, with growth in some of the more expensive segments in each category (for example, more growth in plant-based meat than in tofu, and more growth in oat milk than in soy milk). It is possible that early adopters are less motivated by price than by factors such as health, sustainability or taste.

So, despite good growth in France, manufacturers should not be complacent. It is likely that further progress on affordability will be necessary to reach a wider audience in France, but this should not come at the cost of product quality: taste and performance should remain paramount when developing new products.

Helen Breewood,

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

Overall, the positive trends observed over the years confirm that the French plant-based market continues to grow. This is an encouraging signal, reflecting both the increasing availability of products and a growing consumer appetite for plant-based options.

Sustaining this momentum, however, will require continued efforts to support innovation and nurture an ecosystem of still young and often fragile companies. This includes developing appropriate financing solutions, fostering stronger collaboration between public and private investors, ensuring continued policy support from the government, and encouraging greater engagement from established industry players.

France is well-positioned to become a leading country in this sector. Seizing this opportunity will drive economic growth while also contributing meaningfully to national and European environmental objectives.

Helene Grosshans,

Senior Infrastructure Investment Manager at the Good Food Institute Europe

About the Good Food Institute Europe

The Good Food Institute Europe is a nonprofit 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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