

Dairy Products and Alternatives in France

September 2023

Table of Contents

Dairy Products and Alternatives in France

EXECUTIVE SUMMARY

Dairy products and alternatives in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

- Table 1 Sales of Dairy Products and Alternatives by Category: Value 2018-2023
- Table 2 Sales of Dairy Products and Alternatives by Category: % Value Growth 2018-2023
- Table 3 NBO Company Shares of Dairy Products and Alternatives: % Value 2019-2023
- Table 4 LBN Brand Shares of Dairy Products and Alternatives: % Value 2020-2023
- Table 5 Penetration of Private Label by Category: % Value 2018-2023
- Table 6 Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023
- Table 7 Forecast Sales of Dairy Products and Alternatives by Category: Value 2023-2028
- Table 8 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Falling birth rates continue to negatively impact demand for baby food in 2023

Organic baby food remains popular with French parents as they seek the best for their young children

Consolidated competitive landscape but smaller players gradually gain ground

PROSPECTS AND OPPORTUNITIES

Expanding target audience in the face of subdued birth rates

Special baby milk formula offers further growth potential

Clean labels and provenance likely to increasingly attract parents

CATEGORY DATA

- Table 9 Sales of Baby Food by Category: Volume 2018-2023
- Table 10 Sales of Baby Food by Category: Value 2018-2023
- Table 11 Sales of Baby Food by Category: % Volume Growth 2018-2023
- Table 12 Sales of Baby Food by Category: % Value Growth 2018-2023
- Table 13 Sales of Growing-Up Milk Formula by Age: % Value 2018-2023
- Table 14 NBO Company Shares of Baby Food: % Value 2019-2023
- Table 15 LBN Brand Shares of Baby Food: % Value 2020-2023
- Table 16 Distribution of Baby Food by Format: % Value 2018-2023
- Table 17 Forecast Sales of Baby Food by Category: Volume 2023-2028
- Table 18 Forecast Sales of Baby Food by Category: Value 2023-2028
- Table 19 Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028
- Table 20 Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

Butter and Spreads in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price hikes subdue demand, but butter remains popular in France

Groupe Lactalis to strengthen leadership of competitive landscape

Distribution remains dominated by offline grocery retailers

PROSPECTS AND OPPORTUNITIES

Butter to retain popularity as natural, clean product in France

Président focuses on convenience with latest launch

Spreads players look to push health aspects to drive consumer interest

CATEGORY DATA

- Table 21 Sales of Butter and Spreads by Category: Volume 2018-2023
- Table 22 Sales of Butter and Spreads by Category: Value 2018-2023
- Table 23 Sales of Butter and Spreads by Category: % Volume Growth 2018-2023
- Table 24 Sales of Butter and Spreads by Category: % Value Growth 2018-2023
- Table 25 NBO Company Shares of Butter and Spreads: % Value 2019-2023
- Table 26 LBN Brand Shares of Butter and Spreads: % Value 2020-2023
- Table 27 Distribution of Butter and Spreads by Format: % Value 2018-2023
- Table 28 Forecast Sales of Butter and Spreads by Category: Volume 2023-2028
- Table 29 Forecast Sales of Butter and Spreads by Category: Value 2023-2028
- Table 30 Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028
- Table 31 Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

Cheese in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mixed performance for cheese as retail demand remains below pre-pandemic levels

Private label remains popular choice in inflationary period

Clean labels and the increasing popularity of organic cheese

PROSPECTS AND OPPORTUNITIES

Foreign cheese varieties set to gain further growth momentum

Expanding cheese consumption occasions

Innovation likely to return once inflation eases

CATEGORY DATA

- Table 32 Sales of Cheese by Category: Volume 2018-2023
- Table 33 Sales of Cheese by Category: Value 2018-2023
- Table 34 Sales of Cheese by Category: % Volume Growth 2018-2023
- Table 35 Sales of Cheese by Category: % Value Growth 2018-2023
- Table 36 Sales of Spreadable Processed Cheese by Type: % Value 2018-2023
- Table 37 Sales of Soft Cheese by Type: % Value 2018-2023
- Table 38 Sales of Hard Cheese by Type: % Value 2018-2023
- Table 39 NBO Company Shares of Cheese: % Value 2019-2023
- Table 40 LBN Brand Shares of Cheese: % Value 2020-2023
- Table 41 Distribution of Cheese by Format: % Value 2018-2023
- Table 42 Forecast Sales of Cheese by Category: Volume 2023-2028
- Table 43 Forecast Sales of Cheese by Category: Value 2023-2028
- Table 44 Forecast Sales of Cheese by Category: % Volume Growth 2023-2028
- Table 45 Forecast Sales of Cheese by Category: % Value Growth 2023-2028

KEY DATA FINDINGS

2023 DEVELOPMENTS

Retail volumes continue to decline following marginal upturn in 2020

Dairy only flavoured milk drinks remains positive performer driven by younger target audience

Private label retains notable share as consumers favour affordable options during cost-of-living crisis

PROSPECTS AND OPPORTUNITIES

Players likely to rely on promotional strategies in attempt to drive up consumption

Natural claims to address animal welfare concerns

Alternative sources to cow's milk remain niche due to higher prices

CATEGORY DATA

- Table 46 Sales of Drinking Milk Products by Category: Volume 2018-2023
- Table 47 Sales of Drinking Milk Products by Category: Value 2018-2023
- Table 48 Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023
- Table 49 Sales of Drinking Milk Products by Category: % Value Growth 2018-2023
- Table 50 NBO Company Shares of Drinking Milk Products: % Value 2019-2023
- Table 51 LBN Brand Shares of Drinking Milk Products: % Value 2020-2023
- Table 52 Distribution of Drinking Milk Products by Format: % Value 2018-2023
- Table 53 Forecast Sales of Drinking Milk Products Products by Category: Volume 2023-2028
- Table 54 Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028
- Table 55 Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028
- Table 56 Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

Yoghurt and Sour Milk Products in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Mixed performance for yoghurt and sour milk products

Sour milk products struggles to achieve stronger penetration in France

Consolidated competitive landscape but private label is well represented

PROSPECTS AND OPPORTUNITIES

The challenge of reducing and recycling packaging

Alternatives to yoghurt based on cow's milk

Launch of initiative to extend use-by dates to reduce food waste

CATEGORY DATA

- Table 57 Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023
- Table 58 Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023
- Table 59 Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023
- Table 60 Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023
- Table 61 Sales of Flavoured Yoghurt by Flavour: Rankings 2018-2023
- Table 62 NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023
- Table 63 LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023
- Table 64 Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023
- Table 65 Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2023-2028
- Table 66 Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028
- Table 67 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028
- Table 68 Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

Other Dairy in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cream remains important dairy product for French consumers

Negative perception of condensed and evaporated milk drives further declines

Private label gains share in unstable economic context

PROSPECTS AND OPPORTUNITIES

Fromage frais offers limited innovation and faces competition from yoghurt

Alternatives to cow's milk offer more exciting development potential

While modern grocery retailers dominate, e-commerce set to gain further share

CATEGORY DATA

Table 69 - Sales of Other Dairy by Category: Volume 2018-2023

Table 70 - Sales of Other Dairy by Category: Value 2018-2023

Table 71 - Sales of Other Dairy by Category: % Volume Growth 2018-2023

Table 72 - Sales of Other Dairy by Category: % Value Growth 2018-2023

Table 73 - Sales of Cream by Type: % Value 2018-2023

Table 74 - NBO Company Shares of Other Dairy: % Value 2019-2023

Table 75 - LBN Brand Shares of Other Dairy: % Value 2020-2023

Table 76 - Distribution of Other Dairy by Format: % Value 2018-2023

Table 77 - Forecast Sales of Other Dairy by Category: Volume 2023-2028

Table 78 - Forecast Sales of Other Dairy by Category: Value 2023-2028

Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028

Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

Plant-Based Dairy in France

KEY DATA FINDINGS

2023 DEVELOPMENTS

Further retail declines for plant-based dairy as foodservice continues to make gains

Soy drinks drags down overall performance of plant-based milk

Consolidated at the top but smaller players are making gains

PROSPECTS AND OPPORTUNITIES

Mixed performance ahead for plant-based dairy

Dynamic plant-based cheese offers further potential for development

Small local players set to differentiate their offer as major dairy players gain ground

CATEGORY DATA

Table 81 - Sales of Plant-Based Dairy by Category: Value 2018-2023

Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2018-2023

Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2020-2023

Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2019-2023

Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2020-2023

Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2018-2023

Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2023-2028

Table 88 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
 trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
 country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/dairy-products-and-alternatives-infrance/report.