



Health and Wellness in France

December 2025

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EXECUTIVE SUMMARY

Health and wellness shifts towards pragmatism, affordability and everyday relevance

INDUSTRY PERFORMANCE

Sugar reduction, reformulation and clean labels dominate health and wellness performance
Affordability pressures reshape premium health claims and consumption patterns

WHAT'S NEXT

Health and wellness growth will be driven by mainstream integration and functional relevance

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HW Hot Drinks in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflation reshapes demand for health and wellness hot drinks

INDUSTRY PERFORMANCE

Price sensitivity weighs on premium health and wellness hot drinks
Organic hot drinks continue to struggle after the post-pandemic correction
Natural tea remains resilient as consumption habits evolve

WHAT'S NEXT

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HW Soft Drinks in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Weather volatility and affordability pressures shape health and wellness soft drinks

INDUSTRY PERFORMANCE

Climate sensitivity and sugar reduction define health and wellness soft drinks
Natural soft drinks face structural distrust despite long-standing appeal
Good source of minerals shifts towards functional soft drinks

WHAT'S NEXT

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[HW Snacks in France](#)

KEY DATA FINDINGS

2024 DEVELOPMENTS

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INDUSTRY PERFORMANCE

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Gluten free expands beyond specialist products into mainstream snacking
Natural positioning gains ground as consumers move away from organic premiums

WHAT'S NEXT

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[HW Dairy Products and Alternatives in France](#)

KEY DATA FINDINGS

2024 DEVELOPMENTS

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INDUSTRY PERFORMANCE

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WHAT'S NEXT

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KEY DATA FINDINGS

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INDUSTRY PERFORMANCE

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Gluten free continues to broaden from specialist needs to mainstream usage
Reduced sugar and reduced salt gain traction in sauces, condiments and sweet spreads

WHAT'S NEXT

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HW Staple Foods in France

KEY DATA FINDINGS

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INDUSTRY PERFORMANCE

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Organic staples remain resilient in selected categories as bulk formats expand
Vegan and flexitarian staples grow, but processing scrutiny and naming rules create friction

WHAT’S NEXT

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