Health and Wellness in France

December 2025

Table of Contents

Health and Wellness in France

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

COUNTRY REPORTS DISCLAIMER

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

Affordability constraints shape the outlook for health and wellness hot drinks

Organic hot drinks are expected to recover selectively over the forecast period

Natural positioning benefits from demand for lower caffeine and relaxation

CATEGORY DATA

Table 1 - Sales of Hot Drinks by Health and Wellness Type: Value 2020-2024

Table 2 - Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2020-2024

Table 3 - Company Shares of Organic Hot Drinks (Biggest HW Type in Global Hot Drinks): % Value 2020-2024

Table 4 - Company Shares of Natural Hot Drinks (2nd Biggest HW Type in Global Hot Drinks): % Value 2020-2024

Table 5 - Company Shares of Gluten Free Hot Drinks (3rd Biggest HW Type in Global Hot Drinks): % Value 2020-2024

Table 6 - Company Shares of Good Source of Vitamins Hot Drinks (4th Biggest HW Type in Global Hot Drinks): % Value 2020-2024

Table 7 - Company Shares of No Allergens Hot Drinks (5th Biggest HW Type in Global Hot Drinks): % Value 2020-2024

Table 8 - Forecast Sales of Hot Drinks by Health and Wellness Type: Value 2024-2029

Table 9 - Forecast Sales of Hot Drinks by Health and Wellness Type: % Value Growth 2024-2029

COUNTRY REPORTS DISCLAIMER

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

Innovation and reduced sugar underpin future health and wellness growth

Natural soft drinks face prolonged pressure from trust and environmental concerns

Good source of minerals expands through functional and hybrid innovation

CATEGORY DATA

COUNTRY REPORTS DISCLAIMER

HW Snacks in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Health and wellness positioning strengthens amid shifting consumer priorities

INDUSTRY PERFORMANCE

Clean labels and functionality drive health and wellness snack innovation

Gluten free expands beyond specialist products into mainstream snacking

Natural positioning gains ground as consumers move away from organic premiums

WHAT'S NEXT

Clean labels and functional benefits shape the future of health and wellness snacks

Gluten free growth continues, driven by reformulation rather than new formats

Natural positioning expands as a value alternative to organic snacks

CATEGORY DATA

COUNTRY REPORTS DISCLAIMER

HW Dairy Products and Alternatives in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Flexitarian habits and clean label expectations reshape dairy health and wellness

INDUSTRY PERFORMANCE

Flexitarian routines support plant-based growth, but processing concerns rise
Organic dairy loses momentum as prices rise, with private label gaining ground
High protein gains mainstream appeal beyond sports nutrition

WHAT'S NEXT

Clean labels, functionality and alternative milks drive future health and wellness demand
Organic recovery depends on affordability and the resilience of smaller producers
High protein expands into more dairy formats, with private label likely to intensify competition

CATEGORY DATA

Table 28 - Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2020-2024
Table 29 - Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2020-2024
Table 30 - Company Shares of Organic Dairy Products and Alternatives (Biggest HW Type in Global Dairy Products and Alternatives): % Value 2020-2024
Table 31 - Company Shares of Good Source of Minerals Dairy Products and Alternatives (2nd Biggest HW Type in Global Dairy Products and Alternatives): % V
Table 32 - Company Shares of Gluten Free Dairy Products and Alternatives (3rd Biggest HW Type in Global Dairy Products and Alternatives): % Value 2020-20
Table 33 - Company Shares of Lactose Free Dairy Products and Alternatives (4th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2020-2
Table 34 - Company Shares of Low Fat Dairy Products and Alternatives (5th Biggest HW Type in Global Dairy Products and Alternatives): % Value 2020-2024
Table 35 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: Value 2024-2029
Table 36 - Forecast Sales of Dairy Products and Alternatives by Health and Wellness Type: % Value Growth 2024-2029

COUNTRY REPORTS DISCLAIMER

HW Cooking Ingredients and Meals in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Home cooking and cleaner labels support health and wellness choices

INDUSTRY PERFORMANCE

Home cooking, label transparency and "better for you" reformulation shape the category
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

Clean labels, "Made in France" cues and adventurous flavours drive future innovation
Gluten free is expected to grow steadily as lifestyle adoption continues
Reduced sugar/no sugar is expected to expand through reformulation and "healthier indulgence"

CATEGORY DATA

Table 37 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2020-2024
Table 38 - Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2020-2024
Table 39 - Company Shares of Organic Cooking Ingredients and Meals (Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2020-2024
Table 40 - Company Shares of Gluten Free Cooking Ingredients and Meals (2nd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2020-2024
Table 41 - Company Shares of Vegetarian Cooking Ingredients and Meals (3rd Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2020-2024

Table 42 - Company Shares of Vegan Cooking Ingredients and Meals (4th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2020-2024
Table 43 - Company Shares of Natural Cooking Ingredients and Meals (5th Biggest HW Type in Global Cooking Ingredients and Meals): % Value 2020-2024
Table 44 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: Value 2024-2029
Table 45 - Forecast Sales of Cooking Ingredients and Meals by Health and Wellness Type: % Value Growth 2024-2029

COUNTRY REPORTS DISCLAIMER

HW Staple Foods in France

KEY DATA FINDINGS

2024 DEVELOPMENTS

Local sourcing, healthier reformulation and flexitarian habits support staple foods demand

INDUSTRY PERFORMANCE

Clean labels and “Made in France” credentials gain importance across staples
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

Functional everyday staples and permissible indulgence will shape future innovation
Organic staples are likely to recover gradually, led by private label and local credentials
Vegan staples will expand, with a shift towards cleaner labels and further consolidation

CATEGORY DATA

Table 46 - Sales of Staple Foods by Health and Wellness Type: Value 2020-2024
Table 47 - Sales of Staple Foods by Health and Wellness Type: % Value Growth 2020-2024
Table 48 - Company Shares of Gluten Free Staple Foods (Biggest HW Type in Global Staple Foods): % Value 2020-2024
Table 49 - Company Shares of Organic Staple Foods (2nd Biggest HW Type in Global Staple Foods): % Value 2020-2024
Table 50 - Company Shares of High Fibre Staple Foods (3rd Biggest HW Type in Global Staple Foods): % Value 2020-2024
Table 51 - Company Shares of Vegetarian Staple Foods (4th Biggest HW Type in Global Staple Foods): % Value 2020-2024
Table 52 - Company Shares of No Allergens Staple Foods (5th Biggest HW Type in Global Staple Foods): % Value 2020-2024
Table 53 - Forecast Sales of Staple Foods by Health and Wellness Type: Value 2024-2029
Table 54 - Forecast Sales of Staple Foods by Health and Wellness Type: % Value Growth 2024-2029

COUNTRY REPORTS DISCLAIMER

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/health-and-wellness-in-france/report.