

# **Cooking Ingredients and Meals in France**

November 2023

**Table of Contents** 

#### Cooking Ingredients and Meals in France

#### EXECUTIVE SUMMARY

Cooking ingredients and meals in 2023: The big picture Key trends in 2023 Competitive landscape Channel developments What next for cooking ingredients and meals?

#### MARKET DATA

Table 1 - Sales of Cooking Ingredients and Meals by Category: Volume 2018-2023
Table 2 - Sales of Cooking Ingredients and Meals by Category: Value 2018-2023
Table 3 - Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2018-2023
Table 4 - Sales of Cooking Ingredients and Meals by Category: % Value Growth 2018-2023
Table 5 - NBO Company Shares of Cooking Ingredients and Meals: % Value 2019-2023
Table 6 - LBN Brand Shares of Cooking Ingredients and Meals: % Value 2020-2023
Table 7 - Penetration of Private Label by Category: % Value 2018-2023
Table 8 - Distribution of Cooking Ingredients and Meals by Format: % Value 2018-2023
Table 9 - Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2023-2028
Table 10 - Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2023-2028
Table 11 - Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2023-2028
Table 12 - Forecast Sales of Cooking Ingredients and Meals by Category: % Value Growth 2023-2028

#### DISCLAIMER

SOURCES

Summary 1 - Research Sources

Edible Oils in France

### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Edible oils enjoys recovery from the impacts created by the Russia-Ukraine war Olive oil remains a cornerstone of edible oils in France Puget maintains its top spot while private label ranges continue to rise in image and popularity

#### PROSPECTS AND OPPORTUNITIES

Health trends and clean labels expected to drive developments Domestic oils will continue to benefit from the "Made in France" trend Direct-to-consumer developments expected further in locally produced edible oils

#### CATEGORY DATA

Table 13 - Sales of Edible Oils by Category: Volume 2018-2023
Table 14 - Sales of Edible Oils by Category: Value 2018-2023
Table 15 - Sales of Edible Oils by Category: % Volume Growth 2018-2023
Table 16 - Sales of Edible Oils by Category: % Value Growth 2018-2023
Table 17 - NBO Company Shares of Edible Oils: % Value 2019-2023
Table 18 - LBN Brand Shares of Edible Oils: % Value 2020-2023
Table 19 - Distribution of Edible Oils by Category: Volume 2023-2028
Table 20 - Forecast Sales of Edible Oils by Category: Value 2023-2028
Table 21 - Forecast Sales of Edible Oils by Category: Wolume Growth 2023-2028
Table 22 - Forecast Sales of Edible Oils by Category: % Value Growth 2023-2028
Table 23 - Forecast Sales of Edible Oils by Category: % Value Growth 2023-2028

#### Meals and Soups in France

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Ready meals players focus on consumer trends to overcome challenges caused by price hikes Soup challenged by periods of hot weather, thus dampening demand Frozen pizza starts to recover from Buitoni E coli scandal in France

#### PROSPECTS AND OPPORTUNITIES

Rise of single-person households supports the newer format of single-serving ready meals Sustainability trends influence packaging formats in ready meals, while struggling soup also gets a makeover Meal kit leader Quitoque teams up with top French TV chef Philippe Etchebest

#### CATEGORY DATA

Table 24 - Sales of Meals and Soups by Category: Volume 2018-2023
Table 25 - Sales of Meals and Soups by Category: Value 2018-2023
Table 26 - Sales of Meals and Soups by Category: % Volume Growth 2018-2023
Table 27 - Sales of Meals and Soups by Category: % Value Growth 2018-2023
Table 28 - Sales of Chilled Ready Meals by Ethnicity: % Value 2018-2023
Table 29 - Sales of Frozen Ready Meals by Ethnicity: % Value 2018-2023
Table 30 - Sales of Soup by Leading Flavours: Rankings 2018-2023
Table 31 - NBO Company Shares of Meals and Soups: % Value 2019-2023
Table 32 - LBN Brand Shares of Meals and Soups by Category: Volume 2023-2028
Table 35 - Forecast Sales of Meals and Soups by Category: Value 2023-2028
Table 36 - Forecast Sales of Meals and Soups by Category: % Volume Growth 2023-2028
Table 37 - Forecast Sales of Meals and Soups by Category: % Value 2023-2028

#### Sauces, Dips and Condiments in France

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Sauces see mixed trends, with an overall positive outlook Subtle shrinkflation seen in sauces, dips and condiments, while players try to avoid off-putting price hikes Mustard continues to face challenges, from stock shortages to dietary trends

#### PROSPECTS AND OPPORTUNITIES

Exotic flavour trends drive popularity of chilli sauces Pickled products set for an ongoing revival in France Clean labels and reduced ingredients could help to boost brand image

#### CATEGORY DATA

- Table 38 Sales of Sauces, Dips and Condiments by Category: Volume 2018-2023
- Table 39 Sales of Sauces, Dips and Condiments by Category: Value 2018-2023
- Table 40 Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2018-2023
- Table 41 Sales of Sauces, Dips and Condiments by Category: % Value Growth 2018-2023
- Table 42 Sales of Liquid Recipe Sauces by Type: % Value 2018-2023
- Table 43 Sales of Other Sauces and Condiments by Type: Rankings 2018-2023
- Table 44 NBO Company Shares of Sauces, Dips and Condiments: % Value 2019-2023
- Table 45 LBN Brand Shares of Sauces, Dips and Condiments: % Value 2020-2023
- Table 46 Distribution of Sauces, Dips and Condiments by Format: % Value 2018-2023

Table 47 - Forecast Sales of Sauces, Dips and Condiments by Category: Volume 2023-2028Table 48 - Forecast Sales of Sauces, Dips and Condiments by Category: Value 2023-2028

Table 49 - Forecast Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2023-2028

Table 50 - Forecast Sales of Sauces, Dips and Condiments by Category: % Value Growth 2023-2028

#### Sweet Spreads in France

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Baseline trends persist in sweet spreads, with chocolate spreads and nut and seed based spreads seeing healthy growth Honey struggles to recover from a poor harvest Bonne Maman uses shrinkflation to boost its profits following Intermarché dispute

#### PROSPECTS AND OPPORTUNITIES

Low sugar trends could boost sales through innovation in 65% fruit "jams" Chocolate spreads will continue along its baseline trends, with ongoing competition between smaller players Organic and "Made in France" trends see both opportunities and challenges

#### CATEGORY DATA

Table 51 - Sales of Sweet Spreads by Category: Volume 2018-2023Table 52 - Sales of Sweet Spreads by Category: Value 2018-2023Table 53 - Sales of Sweet Spreads by Category: % Volume Growth 2018-2023Table 54 - Sales of Sweet Spreads by Category: % Value Growth 2018-2023Table 55 - Sales of Jams and Preserves by Leading Flavours: Rankings 2018-2023Table 56 - NBO Company Shares of Sweet Spreads: % Value 2019-2023Table 57 - LBN Brand Shares of Sweet Spreads: % Value 2020-2023Table 58 - Distribution of Sweet Spreads by Format: % Value 2018-2023Table 59 - Forecast Sales of Sweet Spreads by Category: Volume 2023-2028Table 60 - Forecast Sales of Sweet Spreads by Category: % Volume Growth 2023-2028Table 61 - Forecast Sales of Sweet Spreads by Category: % Volume Growth 2023-2028Table 62 - Forecast Sales of Sweet Spreads 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/cooking-ingredients-and-meals-infrance/report.