

Trends in the French Market for Wellness-Oriented Food Products, Superfoods, and Related Sectors

1. Overview of the French Food & Beverage Market

1.1 France's General Export Landscape

Since the early 2000s, France has maintained a negative overall trade balance. However, the agri-food sector stands out as one of the few consistently positive contributors. The French export strategy emphasizes quality, excellence, and savoir-faire.

Key Highlights (2024):

- Top Exporter: France is the world's leading exporter of potatoes and Europe's top producer of hemp and flax.
- Dairy Sector: A cornerstone of both the French economy and cultural identity, the dairy industry generates €43 billion in revenue, 40% of which is exported—making France the world's fourth-largest dairy exporter. It is the second-largest exporter in the EU (after Germany) and the sixth-largest global producer.
 - 3.2 million dairy cows produce 23.5 billion liters of milk
 - 900,000 goats → 700 million liters of milk
 - 1.2 million sheep → 330 million liters of milk
 - 98% of raw milk is processed into cheese, butter, and milk powder.
- Meat Sector: €34.2 billion in revenue, with €4.3 billion generated from exports (2021).
- Fisheries & Aquaculture: Annual production totals 676,000 tons, generating €1.9 billion in revenue.

In 2024, the growth in agri-food imports (+€595 million / +9%) surpassed exports growth (+€426 million / +6%), reinforcing a trend toward increased dependency on imported goods.

1.2 France's Import Dynamics

Imports from non-EU countries accounted for €2.5 billion in agri-food products. Raw product imports rose by 10% (+€138 million), while processed food imports increased by 9% (+€457 million).

Key Raw Product Imports (2023):

- Total value: €846 million
- Leading segments include:
 - Fruits: €432 million
 - Vegetables, flowers, cultural plants: €314 million
 - Cereals, legumes, oilseeds: €206 million
 - Fisheries: €190 million
 - Coffee, cocoa, tea: €162 million
 - Living animals, eggs, honey: €73 million

Growth areas:

- Beverage plants (coffee, cocoa): +€50 million

- Citrus fruits: +€32 million
- Avocados: +€25 million

Key Processed Food Imports (2023):

- Total value: €1.66 billion
- Leading products:
 - Sugar, chocolate, sweets: €1.375 billion
 - Meat (bovine, pork, poultry): €763 million
 - Fruit & vegetable-based products: €620 million
 - Dairy & ice creams: €531 million
 - Processed seafood: €444 million
 - Alcoholic beverages (wine, champagne, liquors): €410 million
 - Oils & fats: €376 million
 - Biscuits, pasta, bakery: €347 million
 - Cereal-based products: €238 million
 - Animal feed: €170 million

Source: French Ministry of Finance

1.3 Rising Demand for Tropical and Asian Flavors

France has witnessed a growing appetite for tropical and exotic products, particularly those with roots in Asian cuisines. This shift aligns with broader cultural trends, including the popularity of Japanese and Korean entertainment, and is reinforced by France's Asian diaspora, which comprises approximately 7% of the population.

Key Insights:

- Perception: French consumers associate Asian food with attributes such as "scented" (94%), "exotic" (92%), "colorful," and "flavorful" (90%).
- Retail Sales: Sales of exotic food products in supermarkets rose by 6% in 2017, reaching €900 million.
- Consumer Habits: 22% of French consumers eat Asian food several times a month; 75% at least once a month. It's now the second most popular cuisine after French.
- Top Products: Nems (64%), rice (59%), fried noodles (49%), sushi (37%), and coconut milk.
- Urban Influence: 71% of city dwellers and 80% of those under 35 consume Asian food monthly. Dining is often social—85% eat it with others, mostly at night (64%).

In affluent neighbourhoods, exotic cuisines have become trendy. The so-called “Bobo” (bourgeois-bohemian) effect has popularized niche dishes like *bo bun*, *banh mi*, and *bibimbap*.

Asian Food Service Sector (2023):

- Revenue: €42.2 billion (6% YoY increase)
- Restaurant types: traditional, fast-food, take-away
- Consumer preference: 58% prefer on-site dining

| Trend | Description | Opportunities |
|--|--|---|
| Authenticity & Regionalism | Interest in regional cuisines (e.g., Korean, Vietnamese, Thai) | Potential for lesser-known Asian products and authentic grocery imports |
| Vegetarian/Vegan Options | Responds to rising demand for eco-conscious, meat-free diets | New markets for plant-based Asian dishes |
| Street Food Popularity | Affordable, fast, and flavourful | Entry point for new brands |
| Fermented Foods | Health-conscious trend with probiotic benefits | Products like kimchi and miso are gaining traction |
| Traditional Drinks | Matcha, bubble tea, and herbal teas | Strong growth potential vs dominant UK tea brands |
| Healthy & Balanced Meals | Perceived as light and nutritious | Appeals to wellness-conscious consumers |
| Immersive Dining Experience | Cultural exploration via cuisine and décor | Showcase underrepresented cultures (e.g., Sri Lanka) |
| Fusion Cuisine & Collaborations | Innovative blends by chefs from various Asian origins | Leverage existing diaspora reputations |

1.4 Shift Toward Ethical, Organic, and Sustainable Consumption

France has long expressed concern over industrial agriculture and pesticide use, dating back to post-WWII modernization. Since the 1990s, ecological awareness has prompted consumers to favor ethical and organic alternatives.

Organic Agriculture in France:

- 10.4% of all farming areas are organic.
- Organic product sales rose from €23 billion to €134 billion between 2000 and 2020.
- Decline in 2022 (-4.6%) attributed to inflation, energy costs, and reduced purchasing power post-COVID.

Despite this, France remains the **5th largest organic product consumer globally**.

Trends Supporting Ethical Consumption:

- Short Food Supply Chains (SFSCs): 23% of farmers sell directly, especially honey, wine, and olive oil.
- Fair Trade Products: Consumers increasingly support labels like *Rainforest Alliance*.
- Lifestyle Changes: In 2021, 31% of French people planned to reduce or eliminate animal products from their diets.
- Circular Economy Initiatives: For instance, repurposing coconut husk as peat in organic farming.

The organic movement in France is no longer just about food, it's a broader lifestyle shift toward sustainability, ethical production, and environmental stewardship.