

2025 ACTIVITY REPORT

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1. PREAMBLE

The French Food Observatory (OQALI) was created in 2008 to support public policies aimed at improving the nutritional quality of food. Founded by the French Ministries responsible for food, health and consumer affairs, it is jointly run by the National Research Institute for Agriculture, Food and the Environment (INRAE) and the French Agency for Food, Environmental and Occupational Health & Safety (ANSES). It is part of the National Programme for Food (PNA) and the National Health and Nutrition Programme (PNNS).

OQALI monitors the overall food supply and the nutritional quality of processed products available on the French market. To do this, it periodically carries out studies on different product categories such as breakfast cereals, fresh dairy products and desserts, and ready-to-eat frozen meals. Its missions also include undertaking studies on cross-cutting issues such as the use of certain ingredients (additives, sweetening ingredients, etc.), and monitoring the deployment of the Nutri-Score label and the implementation of collective agreements (as provided for in Article R. 230-38 of the French Rural and Maritime Fishing Code).

The aim of this report is to summarise OQALI's main activities in 2025.

2. HIGHLIGHTS

Three sectoral studies were published on the website¹ in 2025:

- [Follow-up study on Processed potato products between 2011, 2017 and 2022;](#)
- [Follow-up study on Delicatessen meats and similar between 2010, 2013 and 2020;](#)
- [Follow-up study on Crackers between 2009, 2013 and 2021.](#)

These are the **first simplified reports**, following discussions with stakeholders held in 2024 with a view to better exploiting the results and presenting them in a more informative way. This work led to **7146 new product sheets being published** on the website.

At the same time, **a public procurement procedure was launched to digitise collection of the information gathered by OQALI. The associated contract was notified in 2025, enabling products to be sampled from two food categories** – namely Breakfast cereals and Soft drinks, available on the market in May 2025 – and the OQALI teams to begin changing their operating procedures.

In addition, **a semi-automated tool for coding data into OQALI categories and subcategories** (Oqlassif) was finalised and made available on the website.

Lastly, a scientific and technical support note was published to provide input for discussions between the public authorities and the ministries responsible for health and agriculture on the implementation of collective agreements aimed at reducing the salt, sugar and saturated fatty acid content and increasing the fibre content of products placed on the market. On the basis of the latest available OQALI data, this note updated some of the findings of the scientific and technical support report on reformulation thresholds produced in 2021.

¹ <https://www.oqali.fr/>

3. PUBLISHED DELIVERABLES AND KEY FINDINGS

3.1. Studies by food category

In 2025, OQALI published three follow-up studies each involving three data collection periods for the categories of Processed potato products, Delicatessen meats and similar, and Crackers. The main results of these studies are summarised below.

3.1.1. [Follow-up study on Processed potato products between 2011, 2017 and 2022](#)

Changes in supply, labelling information and nutritional composition were studied for Processed potato products between 2011 (T0), 2017 (T1) and 2022 (T2).

The key findings were as follows:

[Supply by product subcategory broadly stable](#)

The breakdown of **supply** by subcategory remained broadly stable between 2017 and 2022, whether in terms of the number of different products or the sales volume. However, there was a change in the breakdown of supply by type of brand: between 2017 and 2022, the share of national brands increased at the expense of other market segments, particularly retailer brands. Turnover in supply should be highlighted, reflecting the momentum of product launches/withdrawals.

[Decline in the availability of labelling information](#)

Regarding **labelling information**, the presence of nutrition claims and stated serving sizes **fell significantly between 2017 and 2022** (by 3 percentage points and 16 percentage points, respectively).

[Continued progress in nutritional composition](#)

In terms of evolutions in **nutritional composition** with no weighting by market share, significant changes – mainly reductions – were observed between 2017 and 2022:

- there was a significant decrease in average fat content in two out of 14 product subcategories (Old-fashioned crisps; Classic and wavy crisps), due both to product reformulations and turnover in supply aimed at reducing levels;
- there was a significant change in average saturated fatty acid content in 3 out of 14 subcategories:
 - two saw an increase (Classic and wavy crisps; Sautéed potatoes – for the latter, this may be due to turnover in supply);
 - one saw a decrease (French fries (chips) for deep-fryer after cooking, due to product reformulations such as the replacement of palm oil with sunflower oil and turnover in supply aimed at reducing levels);
 - over the longer term (between 2009 and 2022 for crisps, and between 2011 and 2022 for the other subcategories), significant decreases in this nutrient can be seen in many subcategories, including the two for which levels increased between 2017 and 2022;
- there was a significant change in salt content in 4 out of 14 subcategories:
 - three saw a decrease (Classic and wavy crisps; Low-fat crisps; Potato croquettes and balls);
 - one saw an increase (Steamed potatoes). This trend was due to turnover in supply,

with the arrival on the market of products in tins or jars containing higher levels of salt for preservation).

When weighting by market share, there was a slightly higher number of significant changes, mainly downward trends, observed at subcategory level between 2017 and 2022: 5 out of 14 subcategories saw a significant decrease in average levels of fat (Old-fashioned crisps; Classic and wavy crisps; Low-fat crisps; French fries (chips) for deep-fryer after cooking; Oven fries) and salt (Old-fashioned crisps; Classic and wavy crisps; Low-fat crisps; Microwave fries; Ready-to-eat mashed potatoes), as well as one out of 14 subcategories for saturated fatty acids (French fries (chips) for deep-fryer after cooking). Lastly, there was a significant increase in saturated fatty acids in two subcategories (Classic and wavy crisps; Steamed potatoes).

Large proportion of products displaying a Nutri-Score label²

In 2022, 58% of products had a Nutri-Score label, accounting for 79% of the market in terms of sales volume. National brands and retailer brands were the types of brand with the highest proportion of products displaying a Nutri-Score (around two-thirds of their products). In terms of number of product references, those classified as C predominated (25% of products in 2022), but when sales volumes were taken into consideration, products classified as A accounted for the largest share (45% of the market share in 2022).

Impact of Nutri-Score labelling on product composition and market share

Comparing the nutritional values of products with and without the Nutri-Score label in 2022 highlighted **a number of significant differences**:

- without weighting by sales volume, products with a Nutri-Score label had significantly lower saturated fatty acid content than products without a Nutri-Score in 3 out of 14 subcategories (Classic and wavy crisps; French fries (chips) for deep-fryer after cooking; Sautéed potatoes). For the other subcategories analysed for this nutrient, as well as for fat and salt, products with a Nutri-Score label were comparable to those without a Nutri-Score. Comparisons by subcategory and type of brand revealed few significant results;
- when weighting by sales volume, the average content of products with a Nutri-Score label was significantly higher than that of comparable products without the logo in three subcategories for fat (Microwave fries; Potato croquettes and balls; Reconstituted potato flakes) and one subcategory each for saturated fatty acids (Reconstituted potato flakes) and salt (Oven fries). Conversely, the average content of products with a Nutri-Score was significantly lower than those of comparable products without the logo in two subcategories for fat (Classic and wavy crisps; French fries (chips) for deep-fryer after cooking) and one subcategory each for saturated fatty acids (Sautéed potatoes) and salt (Potato croquettes and balls).

Comparing products that were already available in 2017 and then had a Nutri-Score in 2022:

- across the category as a whole, Nutri-Score labelling was not associated with any significant change in **market share** compared with products without a Nutri-Score. At the subcategory level, only 4 out of 14 could be tested. **In just one of these four subcategories (Classic and wavy crisps), Nutri-Score labelling significantly increased the market share of products displaying the logo, compared with those without it;**

² The information presented in this study relates to Nutri-Score as used in 2022, i.e. without the change to the algorithm proposed by the European Nutri-Score Scientific Committee in 2022 and due to come into force on the French market on 16 March 2025.

- across the category as a whole and for products that **displayed a Nutri-Score in 2022 and were already available in 2017**, a significant association was observed for fat: Nutri-Score labelling led to a significant reduction in average fat content compared with products without the logo. For saturated fatty acids and salt, displaying the Nutri-Score label was not associated with any significant change. At the subcategory level, only 5 out of 14 could be tested. Of these five subcategories, only one showed **a statistically significant effect: Classic and wavy crisps, for which Nutri-Score labelling was associated with a significant reduction in average fat content between 2017 and 2022 (compared with products without the logo)**, reflecting reformulations of products bearing the Nutri-Score label aimed at reducing levels.

3.1.2. [Follow-up study on Delicatessen meats and similar between 2010, 2013 and 2020](#)

Changes in supply, labelling information and nutritional composition were studied for Delicatessen meats and similar between 2010 (T0), 2013 (T1) and 2020 (T2).

The key findings were as follows:

[Significant turnover in supply](#)

Supply by subcategory (39 subcategories studied) remained broadly stable between 2013 and 2020, whether in terms of the number of different products or the sales volume. Nevertheless, **significant turnover in supply** was noted, reflecting the momentum of product launches/withdrawals: 79% of the products in 2020 were new references (n=3559).

[Labelling information broadly stable](#)

Nutritional information on labels changed little between 2013 and 2020 across the category as a whole: only the frequency with which stated serving sizes were indicated fell significantly (by 25 percentage points).

[Progress in nutritional composition limited to a few subcategories](#)

Between 2013 and 2020, among the 39 subcategories studied, **only a limited number saw significant changes in average nutritional values:**

- 8 subcategories for fat: five showed a decrease (Assortment of delicatessen meats; Superior quality cooked ham, cooked shoulder and roast pork; Salami; Emulsified sausages; Cooked sausages) and three saw an increase (Cooked ham, cooked shoulder of pork and roast pork; Poultry ham; Duck mousses);
- 6 subcategories for saturated fatty acids: five showed a decrease (Assortment of delicatessen meats; Salami; Emulsified sausages; Cooked sausages; Dry pork sausages) and one saw an increase (Cooked ham, cooked shoulder and roast pork);
- 6 subcategories for protein: all showed an increase (Raw-cured and dry-cured ham; Superior quality cooked ham, cooked shoulder and roast pork; Superior quality low-salt cooked ham, cooked shoulder and roast pork; Pork liver pâtés or mousses; Pork rillettes; Salami);
- 7 subcategories for salt: six showed a decrease (Other sausages; Raw-cured and dry-cured ham; Superior quality low-salt cooked ham, cooked shoulder and roast pork; Superior poultry ham; Low-salt pork belly and lardons; Pork liver pâtés or mousses) and one showed an increase (Poultry lardons and bacon).

These changes may be due to turnover in supply but may also reflect reformulations by manufacturers for certain subcategories.

When weighting by market share, there was a higher number of significant changes (both upward and downward trends) in average nutritional values per subcategory.

Across the category as a whole, the weighted average levels of fat, saturated fatty acids and salt fell, while the weighted average protein content increased. Despite reformulations and turnover in supply aimed at reducing average levels of fat, saturated fatty acids and salt, the choices made by consumers led to an increase in the weighted average content of all the nutrients studied.

[Small proportion of products displaying a Nutri-Score label²](#)

In 2020, **few products in this category showed the Nutri-Score label** (16% of products, n=710), and the vast majority of these had a score of C, D or E (27%, 32% and 30%, respectively, accounting for 89% of products bearing the logo). Products with a Nutri-Score label were mainly from retailer brands (66%) and national brands (23%).

[Impact of Nutri-Score labelling on the composition and market share of products with a Nutri-Score](#)

An analysis of the nutritional values of products with and without a Nutri-Score showed that for most subcategory/nutrient pairs, **products with the Nutri-Score label had levels of nutrients comparable to those without it.**

When weighting by market share, a higher number of significant differences were observed between products with and without a Nutri-Score. Products with a Nutri-Score label were positioned higher or lower than those without a Nutri-Score, depending on the subcategories and/or nutrients.

More generally, across the entire category, Nutri-Score labelling was not associated with any significant change in market share or nutritional values, considering products available in both 2013 and 2020.

3.1.3. [Follow-up study on Crackers between 2009, 2013 and 2021](#)

Changes in supply, labelling information and nutritional composition were studied for Crackers in 2009, 2013 and 2021.

The key findings were as follows:

[Supply by product subcategory broadly stable](#)

Supply per subcategory (19 subcategories studied) remained broadly stable between 2013 and 2021, whether in terms of the number of different products or the sales volume. Nevertheless, **significant turnover in supply** was noted, reflecting the momentum of product launches/withdrawals (66% of the products in 2021 were new references (n=1048)).

[Labelling information that changed over time](#)

Nutritional information on labels changed between 2013 and 2021 across the entire category: the frequency with which stated serving sizes were indicated decreased significantly (by 12 percentage points), while that of nutrition and health claims increased significantly over this period (by 10 percentage points and 3 percentage points, respectively).

Reduction in saturated fatty acid content for almost one in two subcategories in the category

Between 2013 and 2021, **significant decreases were observed in average levels of the three nutrients of interest in the category:**

- **Fat:** 3 out of 19 subcategories (Peanuts, nuts and seeds; Puffs; Tuile biscuits);
- **Saturated fatty acids:** 9 out of 19 subcategories (Peanuts, nuts and seeds; Choux pastries; Salted or coated peanuts; Salted crackers; Crêpes dentelles; Puffs; Pretzels; Tortillas; Tuile biscuits);
- **Salt:** 4 out of 19 subcategories (Salted crackers; Puffs; Tortillas; Tuile biscuits).

These changes may be due to turnover in supply but may also reflect reformulation efforts by manufacturers for certain subcategories.

When weighting by market share, there was a higher number of significant changes in average nutritional values by subcategory, the majority of which were downward trends (for the three nutrients mentioned above).

Across the category as a whole, the weighted average levels of fat, saturated fatty acids and salt fell. Overall, product reformulations and turnover in supply helped to improve nutritional quality, although consumers' choices tended to counter these efforts.

Nearly a third of products displaying a Nutri-Score label²

In 2021, **30% of products in this category showed the Nutri-Score label** (n=467), and the vast majority of these had a score of C or D (28% and 32%, respectively, accounting for 60% of products bearing the logo). Products with a Nutri-Score label were mainly from retailer brands (74%) and national brands (18%).

Impact of Nutri-Score² labelling on the composition and market share of products

An analysis of the nutritional values of products with and without a Nutri-Score showed that for most subcategory/nutrient pairs, **products with the Nutri-Score label had levels of nutrients comparable to those without it.**

When weighting by market share, a higher number of significant differences were observed between products with and without Nutri-Score (ranging from 4 to 8 subcategories depending on the nutrient).

Products with a Nutri-Score label were positioned higher than those without a Nutri-Score, depending on the subcategories, for fat, saturated fatty acids and salt.

More generally, across the entire category, Nutri-Score labelling was not associated with any significant change in market share or nutritional values, considering products available in both 2013 and 2021.

3.2. Scientific and technical support to provide input for discussions on collective agreements

In September 2025, following a formal request from the ministries responsible for health and agriculture, ANSES's OQALI team published a [scientific and technical support note](#), using the most recent OQALI data available to update some of the data from the 2021 scientific and technical

support report on reformulation thresholds. This work provided input for the discussions between industry professionals and public authorities on the establishment of new collective agreements aimed at reducing the salt, sugar and saturated fatty acid content and increasing the fibre content of products placed on the market.

4. OQALI'S OTHER ACTIVITIES IN 2025

Work on sectoral studies for Baby food, Chocolate products, Confectionery, and Ice creams and sorbets was well under way, with publication scheduled for 2026.

4.1. Optimised operation

4.1.1. Digitisation of data collection

Following the decision taken by its Strategic Steering Committee on 18 October 2024, OQALI drew up specifications and issued a call for tenders in early 2025 for the digitisation of data collection. The contract was notified in mid-May 2025 and enabled data available on the French market in May 2025 to be collected for two food categories: Breakfast cereals and Soft drinks. Following receipt of these data in the summer of 2025, the OQALI teams have been working to develop an operating method tailored to the new way of collecting data, with a view to ensuring that the corresponding reports are published in the year following data collection. Particular attention is being paid to the reliability of the data received, in order to maintain the quality of the indicators produced via OQALI.

4.1.2. Methodological development

Methodological development have taken place to define the expected indicators for the "T3" studies, i.e. those for which a fourth data collection is available. This will primarily apply to data collected in 2025.

4.1.3. Provision of data collected via OQALI

In 2025, OQALI continued to publish the data used to produce the published sectoral studies.

4.1.4. Development of a data coding tool

In 2025, OQALI published [Oqlassif](#) on its website. This semi-automated tool, which had been under development since February 2022, can assist with the classification of data into OQALI categories and subcategories. It is currently used by OQALI's teams and could also support stakeholders, particularly in the context of the collective agreements.

4.1.5. Renewal of contracts essential to the smooth operation of OQALI

In 2025, the contracts for third-party maintenance of the OQALI database and outsourcing of data entry were renewed.

4.1.6. Collective agreements

No collective agreements were signed in 2025. Nevertheless, OQALI continued to take part in debates on the development of the new reference framework (see Section 3.2), particularly with

regard to its potential involvement as a third party in the new collective agreements to be put in place following publication of the national strategy on food, nutrition and climate.

4.2. Monitoring the deployment of the Nutri-Score label in France

OQALI continued to monitor the deployment of Nutri-Score in metropolitan France. The 2025 report on trends in market share for brands participating in the system will be published in the first half of 2026.

4.3. International expansion of OQALI

ANSES continues to participate in the [EU Joint Action on health determinants \(Prevent NCD\)](#) (2024-2027) coordinated by Norway, in order to encourage European countries to develop a tool for monitoring the nutritional quality of foods at brand level and also to analyse and interpret the data collected during previous projects (JANPA, Best-ReMAP) and Prevent NCD.

5. DIALOGUE WITH STAKEHOLDERS

5.1. Governance

In 2025, regular updates were provided to stakeholders at various meetings of the:

- Strategic Steering Committee (DGS, DGAL, DGCCRF, ANSES, INRAE) on 20 November;
- Steering Committee (DGS, DGAL, DGCCRF, ANSES, INRAE) on 7 February, 3 April, 26 June and 7 October;
- Technical Orientation Committee (DGS, DGAL, DGCCRF, ANSES, INRAE, ANIA, FCD, CLCV, *Familles Rurales*) on 13 May and 18 November;
- Extended Technical Orientation Committee (DGS, DGAL, DGCCRF, ANSES, INRAE, ANIA, FCD, CLCV, *Familles Rurales* and other OQALI partners) on 18 November.

5.2. Sectoral working groups

The sectoral working groups are made up of representatives from ANSES and INRAE (which jointly run OQALI), as well as industry representatives in the sector who have taken part in data collection. The aims are to present the results of sectoral studies in advance of publication and discuss possible explanations for the trends observed.

The findings of the sectoral study on "Ice cream and sorbets" were presented on 9 September 2025.

6. OUTLOOK FOR 2026

In 2026, the priority for the OQALI teams is to continue capitalising on the data already collected for the sectoral studies, while revising their operating procedures to adapt to digitised data collection and continuing efforts to simplify the deliverables for the first sectoral monitoring studies based on the fourth data collection.

With regard to collective agreements, a third report on the monitoring of targets for reducing salt content in bread will be published in 2026.

Lastly, work on the international expansion of OQALI will continue.