



Euromonitor  
International

# Cafés/Bars in France

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### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Cautious spending keeps cafés/bars subdued, even as chains create pockets of growth

#### INDUSTRY PERFORMANCE

Budget caution keeps France's cafés/bars value sales only slightly positive in 2025

Independent outlets absorb strain more unevenly

Chains capture growth pockets through value architecture and experience layering

#### WHAT'S NEXT?

Independent cafés/bars set to face constrained outlook

Specialist coffee and tea shops to lead innovation and capture share

Health and sustainability to reshape menus and experience formats

#### COMPETITIVE LANDSCAPE

Groupe Bertrand holds leadership through scale and format consistency

Portfolio structure strengthens rollout capability and boosts beer-led growth

Chains outperform independents as new concepts scale beyond traditional cafés

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## Consumer Foodservice in France - Industry Overview

### EXECUTIVE SUMMARY

Pricing pressure reshapes the offer, while delivery-led models regain momentum

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Affordability shapes menus and operating models

Tourism supports value growth, but consumers remain hesitant

Delivery and to-go rise while value remains the constraint

#### WHAT'S NEXT?

Confidence remains fragile, keeping anticipated growth below average

Limited-service restaurants and street stalls/kiosks as best-positioned

Hybridisation, digitisation and dark kitchens to deepen competition

Sustainability and corporate social responsibility become both constraint and opportunity

## COMPETITIVE LANDSCAPE

McDonald's stays number one, while Burger King raises marketing intensity

Value-led challengers scale rapidly in fried chicken and French tacos

Multi-brand groups expand, while grill specialists refresh concepts

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Independent outlets face cost pressure, while chains recover faster

Independent limited-service restaurants remains the exception

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