



Full-Service Restaurants in France

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Full-Service Restaurants in France - Category analysis

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2025 DEVELOPMENTS

Structural pressures keep full-service restaurants flat despite pockets of chain-led innovation

INDUSTRY PERFORMANCE

Demand stagnates despite easing inflation

Ethnic-led premiumisation in chained full-service restaurants

Cost discipline outweighs expansion ambitions

WHAT'S NEXT?

Stagnation is set to persist

Platform dependence is likely to deepen

Sustainability becomes a licence to operate

COMPETITIVE LANDSCAPE

Napaqaro holds leadership through Buffalo Grill upgrades

Le Paradis du Fruit accelerates within Groupe Bertrand

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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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