



# Tea in France

November 2025

Table of Contents

## Tea in France - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Premium and healthy tea options appeal to discerning consumers

#### INDUSTRY PERFORMANCE

Ongoing appreciable value growth and stable volumes for tea in 2025

Positive health perceptions support green tea and fruit/herbal tea

#### WHAT'S NEXT?

Tea set to record stable but undynamic performance over the forecast period

More players to invest in digital and technological advancements in tea

Cold infusions fail to appeal but there is potential for other niche tea options

#### COMPETITIVE LANDSCAPE

Unilever retains slim lead over dynamic Foods International

Dynamic growth for various players, including for private label in fruit/herbal tea

#### CHANNELS

Grocery retailers lead distribution, while e-commerce makes further gains

Rising interest in specialist teas in France

#### CATEGORY DATA

Table 1 - Retail Sales of Tea by Category: Volume 2020-2025

Table 2 - Retail Sales of Tea by Category: Value 2020-2025

Table 3 - Retail Sales of Tea by Category: % Volume Growth 2020-2025

Table 4 - Retail Sales of Tea by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Tea: % Retail Value 2021-2025

Table 6 - LBN Brand Shares of Tea: % Retail Value 2022-2025

Table 7 - Forecast Retail Sales of Tea by Category: Volume 2025-2030

Table 8 - Forecast Retail Sales of Tea by Category: Value 2025-2030

Table 9 - Forecast Retail Sales of Tea by Category: % Volume Growth 2025-2030

Table 10 - Forecast Retail Sales of Tea by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

## Hot Drinks in France - Industry Overview

### EXECUTIVE SUMMARY

Price hikes continue to influence sales of hot drinks in France

### KEY DATA FINDINGS

#### INDUSTRY PERFORMANCE

Mixed performance for hot drinks amid local challenges and rising prices

Coffee continues to drive overall sales of hot drinks in France

Consumers consider balancing value with quality

Health and wellness trends continue to influence purchasing decisions

#### WHAT'S NEXT?

Challenges remain but fresh coffee beans will remain dynamic

New launches in tea likely to spur competitors

Future development to be shaped by current trends and new opportunities

## COMPETITIVE LANDSCAPE

Nestlé France retains strong leadership with wide portfolio

Smaller players outperform leaders

## CHANNELS

Hypermarkets retains leadership while e-commerce makes further gains

Specialists retain appeal, especially through local coffee roasters

Foodservice vs retail split

## MARKET DATA

Table 11 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2020-2025

Table 12 - Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2020-2025

Table 13 - Retail Sales of Hot Drinks by Category: Volume 2020-2025

Table 14 - Retail Sales of Hot Drinks by Category: Value 2020-2025

Table 15 - Retail Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 16 - Retail Sales of Hot Drinks by Category: % Value Growth 2020-2025

Table 17 - Foodservice Sales of Hot Drinks by Category: Volume 2020-2025

Table 18 - Foodservice Sales of Hot Drinks by Category: % Volume Growth 2020-2025

Table 19 - Total Sales of Hot Drinks by Category: Total Volume 2020-2025

Table 20 - Total Sales of Hot Drinks by Category: % Total Volume Growth 2020-2025

Table 21 - NBO Company Shares of Hot Drinks: % Retail Value 2021-2025

Table 22 - LBN Brand Shares of Hot Drinks: % Retail Value 2022-2025

Table 23 - Penetration of Private Label in Hot Drinks by Category: % Retail Value 2020-2025

Table 24 - Retail Distribution of Hot Drinks by Format: % Volume 2020-2025

Table 25 - Retail Distribution of Hot Drinks by Format and Category: % Volume 2025

Table 26 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Breakdown 2025-2030

Table 27 - Forecast Sales of Hot Drinks by Retail vs Foodservice: % Volume Growth 2025-2030

Table 28 - Forecast Retail Sales of Hot Drinks by Category: Volume 2025-2030

Table 29 - Forecast Retail Sales of Hot Drinks by Category: Value 2025-2030

Table 30 - Forecast Retail Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 31 - Forecast Retail Sales of Hot Drinks by Category: % Value Growth 2025-2030

Table 32 - Forecast Foodservice Sales of Hot Drinks by Category: Volume 2025-2030

Table 33 - Forecast Foodservice Sales of Hot Drinks by Category: % Volume Growth 2025-2030

Table 34 - Forecast Total Sales of Hot Drinks by Category: Total Volume 2025-2030

Table 35 - Forecast Total Sales of Hot Drinks by Category: % Total Volume Growth 2025-2030

## COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 1 - Research Sources

### 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/tea-in-france/report](http://www.euromonitor.com/tea-in-france/report).