



**Euromonitor
International**

Soft Drinks in France

December 2025

Table of Contents

EXECUTIVE SUMMARY

Growth amidst economic caution, health concerns, and innovation

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Weather-driven growth amidst economic caution and shifting trends

Sugar concerns and "soda tax" impact

Illegal practices and increased regulatory scrutiny

Health and wellness drives new soft drink innovations in France

WHAT'S NEXT?

Soft drinks in France must navigate climate, taxes, and health trends

Economic headwinds versus event-driven recovery

Sustainability challenges and the rise of non-alcoholic options

COMPETITIVE LANDSCAPE

Neptune strengthens lead in soft drinks with Cristaline's success; Coca-Cola navigates sugar concerns and supply disruptions

Red Bull's dynamic performance and strategic success in energy drinks

CHANNELS

Hypermarkets leads distribution amidst fierce price competition

Dynamic channel performance sees forecourts surge and e-commerce evolve

Foodservice vs retail split

MARKET DATA

Table 1 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025

Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025

Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025

Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025

Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025

Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025

Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025

Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025

Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025

Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025

Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025

Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025

Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025

Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025

Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025

Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025

Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025

Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025

Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025

Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025

Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025

Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025

Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025

Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025

Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025

Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025

Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030

Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030

Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030

Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030

Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030

Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030

Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030

Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030

Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in France

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

[Bottled Water in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Bottled water in France: 2025 performance, future outlook and key trends

INDUSTRY PERFORMANCE

Rebound for bottled water following a challenging 2024

Still bottled water's dominance and segment innovation

WHAT'S NEXT?

Challenging outlook for bottled water, but innovation in functional and flavoured varieties offers growth potential

The future of bottled water amidst regulatory and environmental pressures

Targeted marketing and bold innovation as potential growth drivers

COMPETITIVE LANDSCAPE

Neptune consolidates leadership, while Groupe Danone makes further gains

Mont Roucous is a resilient performer in bottled water's challenging 2025

CHANNELS

Hypermarkets leads distribution, while sales in forecourt retailers skyrocket from low base

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 38 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2020-2025

Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Carbonates in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Navigating decline, taxation, and niche growth areas

INDUSTRY PERFORMANCE

Another challenging year for carbonates despite the favourable weather

Navigating the impact of the updated 2025 soda tax

WHAT'S NEXT?

Sugar backlash and "soda tax" to further dampen the growth potential of carbonates

Exploration of functional carbonates and sustainable production

Natural reduced sugar options offer greater potential in cola carbonates

COMPETITIVE LANDSCAPE

Coca-Cola Entreprises SA retains dominance but loses further share

Dynamic performances by premium brands in tonic water/mixers/other bitters

CHANNELS

Grocery retailers largely dominate distribution

Forecourt retailers and vending driven by impulse purchases

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2020-2025

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2020-2025

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2020-2025

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2020-2025

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2020-2025

Table 54 - Off-trade Sales of Carbonates by Category: Value 2020-2025

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2020-2025

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2020-2025

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2020-2025

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2020-2025

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2021-2025

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2022-2025

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2021-2025

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2022-2025

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2025-2030

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2025-2030

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2025-2030

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2025-2030

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2025-2030

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Concentrates in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Trends, growth drivers, and future outlook for concentrates

INDUSTRY PERFORMANCE

Volume dips while value rises amidst inflationary pressures

Active lifestyles fuel dynamic growth in powder concentrates

WHAT'S NEXT?

Navigating predicted decline with core strengths and strategic innovation

Driving powder volumes through sports and technical innovation

How concentrates will evolve with reduced sugar trend and brand licensing

COMPETITIVE LANDSCAPE

Teisseire's strategic rebound against private label in concentrates

How key brands can help redefine French concentrates

CHANNELS

Segmented distribution for hypermarkets and health and beauty specialists

E-commerce's ascendancy in local concentrates retail

Concentrates Conversions

Summary 2 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

CATEGORY DATA

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 71 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Juice in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Juice faces continued decline amid health concerns and shifting consumer preferences

INDUSTRY PERFORMANCE

Juice faces steep decline amid health scrutiny and lifestyle shifts

Affordability supports demand for nectars and juice drinks

WHAT'S NEXT?

Limited scope for juice's short-term recovery in the local market

Technological innovations to drive the development of juice

The wellness imperative shaping French juice

COMPETITIVE LANDSCAPE

Orangina Suntory consolidates leadership despite strength of private label

Saint-Mamet's entry into chilled juice boosted by HPP differentiation

Established juice players launch accessible, reduced sugar variants amid category decline

CHANNELS

Hypermarkets is leading grocery channel distributing juice in France

On-trade juice sales continue to struggle

CATEGORY DATA

Table 84 - Off-trade Sales of Juice by Category: Volume 2020-2025

Table 85 - Off-trade Sales of Juice by Category: Value 2020-2025

Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2020-2025

Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2020-2025

Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2021-2025

Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2022-2025

Table 90 - NBO Company Shares of Off-trade Juice: % Value 2021-2025

Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2022-2025

Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2025-2030

Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2025-2030

Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2025-2030

Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[RTD Coffee in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Weak performance amidst persistent challenges

INDUSTRY PERFORMANCE

High prices, remote work, and competition dampen RTD coffee appeal in France

Negligible on-trade presence further suppresses potential sales

WHAT'S NEXT?

Pessimistic outlook without stronger unit price control and marketing support

Lack of new investors and innovation may hinder growth

High prices threaten future popularity of cold brew options

COMPETITIVE LANDSCAPE

Arla Foods Amba dominates with Starbucks brand of RTD coffee

CHANNELS

Supermarkets and hypermarkets dominate but proximity and convenient channels fare better

CATEGORY DATA

Table 96 - Off-trade Sales of RTD Coffee: Volume 2020-2025

Table 97 - Off-trade Sales of RTD Coffee: Value 2020-2025

Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2020-2025

Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2020-2025

Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2021-2025

Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2022-2025

Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2021-2025

Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2022-2025

Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2025-2030

Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2025-2030

Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2025-2030

Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

RTD Tea in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Resurgence, innovation, and future growth for RTD tea in France

INDUSTRY PERFORMANCE

New explosion of sales after a disappointing performance in 2024

Reduced sugar variants lead growth amidst health trends

WHAT'S NEXT?

Innovation, health trends, and sustainable packaging to drive future growth

Functional drinks, strategic partnerships, and emerging technologies

Kombucha's influencer-led revival

COMPETITIVE LANDSCAPE

Lipton's challenges amidst delisting and weather impacts

Innovation and health drive competition with the rise of sustainable brands

CHANNELS

Hypermarkets leads but loses ground to alternative channels

E-commerce's gain driven by convenience and competitive pricing

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2020-2025

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2020-2025

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2020-2025

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2020-2025

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2020-2025

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2021-2025

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2022-2025

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2021-2025

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2022-2025

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2025-2030

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2025-2030

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2025-2030

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Energy Drinks in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Momentum in energy drinks despite regulatory headwinds
Ongoing dynamism for energy drinks in France
New “soda tax” prompts shift to reduced sugar options

WHAT'S NEXT?

Substantial growth potential remains in energy drinks despite some threats
The emergence of a generation of new energy drinks
Underdeveloped reduced sugar energy drinks to gain further ground

COMPETITIVE LANDSCAPE

Red Bull strengthens lead of consolidated competitive landscape
Leading players make it challenging for smaller brands to gain higher share

CHANNELS

Hypermarkets/supermarkets dominate distribution but smaller channels make more impressive gains

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2020-2025
Table 122 - Off-trade Sales of Energy Drinks: Value 2020-2025
Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2020-2025
Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2020-2025
Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2021-2025
Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2022-2025
Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2021-2025
Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2022-2025
Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2025-2030
Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2025-2030
Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2025-2030
Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sports Drinks in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Post-Olympic sporting activity, new competition and future innovations

INDUSTRY PERFORMANCE

The rise of reduced sugar as sports drinks records further robust growth
Sports drinks continues to surge post-Paris 2024

WHAT'S NEXT?

Despite some threats, ongoing potential due to sporting events and participation
Personalisation, sustainability, and natural ingredients to drive category's evolution
Navigating health trends and growth opportunities

COMPETITIVE LANDSCAPE

Powerade dominates but faces new competitors
Prime's entry looks to disrupt sports drinks in the local market

CHANNELS

Distribution channels in France: Powerade's impact on sports drink retail

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2020-2025

Table 134 - Off-trade Sales of Sports Drinks: Value 2020-2025

Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2020-2025

Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2020-2025

Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2021-2025

Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2022-2025

Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2021-2025

Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2022-2025

Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2025-2030

Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2025-2030

Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2025-2030

Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/soft-drinks-in-france/report.