



**Euromonitor
International**

Consumer Foodservice By Location in France

March 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Location mix shifts momentum towards travel-linked sites

INDUSTRY PERFORMANCE

Travel outperforms in 2025 as transport hubs regain footfall

Standalone expands slowly as spending caution persists

Retail locations keep momentum through value offers despite weak cafeteria footfall

WHAT'S NEXT?

Travel set to remain primary growth engine

Standalone should edge up outside city centres as population patterns shift

Retail improves gradually, but lodging remains the weakest outlook

COMPETITIVE LANDSCAPE

McDonald's leads non-standalone locations despite slower momentum

Groupe Bertrand strengthens standalone reach through scale and portfolio breadth

Brand concentration increases, raising competitive pressure on independents

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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

CHANNELS

Independent outlets face cost pressure, while chains recover faster

Independent limited-service restaurants remains the exception

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