

# Alcoholic Drinks in France

June 2025

**Table of Contents** 

## Alcoholic Drinks in France

# **EXECUTIVE SUMMARY**

Alcoholic drinks in 2024: The big picture

2024 key trends

Competitive landscape

Retail developments

On-trade vs off-trade split

What next for alcoholic drinks?

## MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

# TAXATION AND DUTY LEVIES

## OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

## KEY NEW PRODUCT LAUNCHES

Outlook

## MARKET INDICATORS

Table 1 - Retail Consumer Expenditure on Alcoholic Drinks 2019-2024

# MARKET DATA

- Table 2 Sales of Alcoholic Drinks by Category: Total Volume 2019-2024
- Table 3 Sales of Alcoholic Drinks by Category: Total Value 2019-2024
- Table 4 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2019-2024
- Table 5 Sales of Alcoholic Drinks by Category: % Total Value Growth 2019-2024
- Table 6 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2024
- Table 7 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2024
- Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2024
- Table 9 GBO Company Shares of Alcoholic Drinks: % Total Volume 2020-2024
- Table 10 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2019-2024
- Table 11 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2024
- Table 12 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2024-2029
- Table 13 Forecast Sales of Alcoholic Drinks by Category: Total Value 2024-2029
- Table 14 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2024-2029
- Table 15 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2024-2029

# DISCLAIMER

# SOURCES

Summary 1 - Research Sources

Beer in France

## **KEY DATA FINDINGS**

#### 2024 DEVELOPMENTS

Beer remains in decline in France in 2024

Heineken remains king of beer

Hypermarkets and supermarkets as favoured off-trade channels

## PROSPECTS AND OPPORTUNITIES

Total volume sales set to stagnate

Low alcohol beer to record fastest value growth

New flavours, nolo trend and rising interest in strong beer will drive development

# CATEGORY BACKGROUND

Lager price band methodology

Summary 2 - Lager by Price Band 2024

## **CATEGORY DATA**

Table 16 - Sales of Beer by Category: Total Volume 2019-2024

Table 17 - Sales of Beer by Category: Total Value 2019-2024

Table 18 - Sales of Beer by Category: % Total Volume Growth 2019-2024

Table 19 - Sales of Beer by Category: % Total Value Growth 2019-2024

Table 20 - Sales of Beer by Off-trade vs On-trade: Volume 2019-2024

Table 21 - Sales of Beer by Off-trade vs On-trade: Value 2019-2024

Table 22 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 23 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2019-2024

Table 24 - Sales of Beer by Craft vs Standard 2019-2024

Table 25 - GBO Company Shares of Beer: % Total Volume 2020-2024

Table 26 - NBO Company Shares of Beer: % Total Volume 2020-2024

Table 27 - LBN Brand Shares of Beer: % Total Volume 2021-2024

Table 28 - Forecast Sales of Beer by Category: Total Volume 2024-2029

Table 29 - Forecast Sales of Beer by Category: Total Value 2024-2029

Table 30 - Forecast Sales of Beer by Category: % Total Volume Growth 2024-2029

Table 31 - Forecast Sales of Beer by Category: % Total Value Growth 2024-2029

# Cider/Perry in France

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Ongoing gloom besets cider/perry in France in 2024

Private label gains ground off-trade, while Agrial Groupe maintains GBO leadership

Hypermarkets and supermarkets lead distribution, while on-trade continues to gather pace

# PROSPECTS AND OPPORTUNITIES

Further falls forecast for cider/perry in France

Players set to invest more in bringing life to the category

The emergence of a new generation of hybrid ciders

# CATEGORY DATA

Table 32 - Sales of Cider/Perry: Total Volume 2019-2024

Table 33 - Sales of Cider/Perry: Total Value 2019-2024

Table 34 - Sales of Cider/Perry: % Total Volume Growth 2019-2024

Table 35 - Sales of Cider/Perry: % Total Value Growth 2019-2024

Table 36 - Sales of Cider/Perry by Off-trade vs On-trade: Volume 2019-2024

- Table 37 Sales of Cider/Perry by Off-trade vs On-trade: Value 2019-2024
- Table 38 Sales of Cider/Perry by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 39 Sales of Cider/Perry by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 40 GBO Company Shares of Cider/Perry: % Total Volume 2020-2024
- Table 41 NBO Company Shares of Cider/Perry: % Total Volume 2020-2024
- Table 42 LBN Brand Shares of Cider/Perry: % Total Volume 2021-2024
- Table 43 Forecast Sales of Cider/Perry: Total Volume 2024-2029
- Table 44 Forecast Sales of Cider/Perry: Total Value 2024-2029
- Table 45 Forecast Sales of Cider/Perry: % Total Volume Growth 2024-2029
- Table 46 Forecast Sales of Cider/Perry: % Total Value Growth 2024-2029

#### Rtds in France

#### **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Surprising recovery for RTDs in France in 2024

J García Carrión leads overall RTDS as Pernod rises robustly

Hypermarkets and supermarkets remain favoured channels for RTD purchases

# PROSPECTS AND OPPORTUNITIES

Hope for future growth rests largely with non alcoholic offerings

No future for hard seltzers

Innovation will be centred around 0.0° variants, with some players focusing on hybrid products

# **CATEGORY DATA**

- Table 47 Sales of RTDs by Category: Total Volume 2019-2024
- Table 48 Sales of RTDs by Category: Total Value 2019-2024
- Table 49 Sales of RTDs by Category: % Total Volume Growth 2019-2024
- Table 50 Sales of RTDs by Category: % Total Value Growth 2019-2024
- Table 51 Sales of RTDs by Off-trade vs On-trade: Volume 2019-2024
- Table 52 Sales of RTDs by Off-trade vs On-trade: Value 2019-2024
- Table 53 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2019-2024
- Table 54 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2019-2024
- Table 55 GBO Company Shares of RTDs: % Total Volume 2020-2024
- Table 56 NBO Company Shares of RTDs: % Total Volume 2020-2024
- Table 57 LBN Brand Shares of RTDs: % Total Volume 2021-2024
- Table 58 Forecast Sales of RTDs by Category: Total Volume 2024-2029
- Table 59 Forecast Sales of RTDs by Category: Total Value 2024-2029
- Table 60 Forecast Sales of RTDs by Category: % Total Volume Growth 2024-2029
- Table 61 Forecast Sales of RTDs by Category: % Total Value Growth 2024-2029

# Spirits in France

# **KEY DATA FINDINGS**

# 2024 DEVELOPMENTS

Spirits sees total volume sales fall in 2024

La Martiniquaise leads, while small, local and specialist players attract greater attention

Hypermarkets holds highest share among distribution channels for spirits in France

## PROSPECTS AND OPPORTUNITIES

Spirits faces uncertain forecast period

Birth of Diageo France in 2025

Scepticism surrounds future of non alcoholic variants within spirits

## CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 3 - Benchmark Brands 2024

## **CATEGORY DATA**

Table 62 - Sales of Spirits by Category: Total Volume 2019-2024

Table 63 - Sales of Spirits by Category: Total Value 2019-2024

Table 64 - Sales of Spirits by Category: % Total Volume Growth 2019-2024

Table 65 - Sales of Spirits by Category: % Total Value Growth 2019-2024

Table 66 - Sales of Spirits by Off-trade vs On-trade: Volume 2019-2024

Table 67 - Sales of Spirits by Off-trade vs On-trade: Value 2019-2024

Table 68 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 69 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2019-2024

Table 70 - Sales of Dark Rum by Price Platform: % Total Volume 2019-2024

Table 71 - Sales of White Rum by Price Platform: % Total Volume 2019-2024

Table 72 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2019-2024

Table 73 - Sales of English Gin by Price Platform: % Total Volume 2019-2024

Table 74 - Sales of Vodka by Price Platform: % Total Volume 2019-2024

Table 75 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2019-2024

Table 76 - GBO Company Shares of Spirits: % Total Volume 2020-2024

Table 77 - NBO Company Shares of Spirits: % Total Volume 2020-2024

Table 78 - LBN Brand Shares of Spirits: % Total Volume 2021-2024

Table 79 - Forecast Sales of Spirits by Category: Total Volume 2024-2029

Table 80 - Forecast Sales of Spirits by Category: Total Value 2024-2029

Table 81 - Forecast Sales of Spirits by Category: % Total Volume Growth 2024-2029

Table 82 - Forecast Sales of Spirits by Category: % Total Value Growth 2024-2029

## Wine in France

## **KEY DATA FINDINGS**

## 2024 DEVELOPMENTS

Wine falls in total volume terms but rises in total value in 2024

Premiumisation and organic trends expand

Grocery retailers secure lion's share of distribution as e-commerce continues to rise

## PROSPECTS AND OPPORTUNITIES

Wine's volume decline set to persist throughout forecast period

Greater diversification and more branded wines expected

Nolo trend likely to gather pace

# **CATEGORY DATA**

Table 83 - Sales of Wine by Category: Total Volume 2019-2024

Table 84 - Sales of Wine by Category: Total Value 2019-2024

Table 85 - Sales of Wine by Category: % Total Volume Growth 2019-2024

Table 86 - Sales of Wine by Category: % Total Value Growth 2019-2024

Table 87 - Sales of Wine by Off-trade vs On-trade: Volume 2019-2024

Table 88 - Sales of Wine by Off-trade vs On-trade: Value 2019-2024

Table 89 - Sales of Wine by Off-trade vs On-trade: % Volume Growth 2019-2024

Table 90 - Sales of Wine by Off-trade vs On-trade: % Value Growth 2019-2024

Table 91 - Sales of Still Red Wine by Price Segment: % Off-trade Volume 2019-2024

Table 92 - Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2019-2024

- Table 93 Sales of Still White Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 94 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2019-2024
- Table 95 GBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024
- Table 96 NBO Company Shares of Still Light Grape Wine: % Total Volume 2020-2024
- Table 97 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2021-2024
- Table 98 GBO Company Shares of Champagne: % Total Volume 2020-2024
- Table 99 NBO Company Shares of Champagne: % Total Volume 2020-2024
- Table 100 LBN Brand Shares of Champagne: % Total Volume 2021-2024
- Table 101 GBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024
- Table 102 NBO Company Shares of Other Sparkling Wine: % Total Volume 2020-2024
- Table 103 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2021-2024
- Table 104 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024
- Table 105 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2020-2024
- Table 106 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2021-2024
- Table 107 GBO Company Shares of Non-grape Wine: % Total Volume 2020-2024
- Table 108 NBO Company Shares of Non-grape Wine: % Total Volume 2020-2024
- Table 109 LBN Brand Shares of Non-grape Wine: % Total Volume 2021-2024
- Table 110 Forecast Sales of Wine by Category: Total Volume 2024-2029
- Table 111 Forecast Sales of Wine by Category: Total Value 2024-2029
- Table 112 Forecast Sales of Wine by Category: % Total Volume Growth 2024-2029
- Table 113 Forecast Sales of Wine by Category: % Total Value Growth 2024-2029

# 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 focusing 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/alcoholic-drinks-in-france/report.