



Hot Drinks in France

November 2025

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Hot Drinks in France

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

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Mixed performance for coffee in mature market

INDUSTRY PERFORMANCE

Rising prices continue to drive value sales, while retail volumes further drop

Positive perception supports dynamic performance by fresh coffee beans

Sustainability concerns place pressure on fresh ground coffee pods

WHAT'S NEXT?

Affordable sustainability of fresh coffee beans insufficient to offset retail volume decline of overall category

Recent technological improvements and new ways of consuming coffee

Emerging challenge for fresh ground coffee pods with new packaging regulations

COMPETITIVE LANDSCAPE

Nestlé retains leadership ahead of Jacobs Douwe Egberts

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CHANNELS

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[Tea in France](#)

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Ongoing appreciable value growth and stable volumes for tea in 2025

Positive health perceptions support green tea and fruit/herbal tea

WHAT'S NEXT?

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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
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[Other Hot Drinks in France](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Other hot drinks remains challenged by rising prices and health concerns

INDUSTRY PERFORMANCE

Further price rises and unhealthy image reduce demand for other hot drinks
Positive performance by other plant-based hot drinks driven by nostalgia and health trends

WHAT'S NEXT?

Less time for breakfast, lactose intolerance and sugar concerns – the main threats for other hot drinks
New ingredients needed to shift consumer attitudes
Brands to focus on healthier options and local production

COMPETITIVE LANDSCAPE

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