



**Euromonitor  
International**

# Hot Drinks in France

November 2025

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### 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

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Hypermarkets retains leadership while e-commerce makes further gains

Specialists retain appeal, especially through local coffee roasters

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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

Players address sustainability concerns through fair trade and packaging concepts

#### CHANNELS

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#### 2025 DEVELOPMENTS

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#### 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  
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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

Nestlé maintains dominance in other hot drinks with wide product portfolio  
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