



Consumer Foodservice in France

March 2026

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Consumer Foodservice in France

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

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Independent outlets face cost pressure, while chains recover faster

Independent limited-service restaurants remains the exception

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Cautious spending keeps cafés/bars subdued, even as chains create pockets of growth

INDUSTRY PERFORMANCE

Budget caution keeps France's cafés/bars value sales only slightly positive in 2025
Independent outlets absorb strain more unevenly
Chains capture growth pockets through value architecture and experience layering

WHAT'S NEXT?

Independent cafés/bars set to face constrained outlook
Specialist coffee and tea shops to lead innovation and capture share
Health and sustainability to reshape menus and experience formats

COMPETITIVE LANDSCAPE

Groupe Bertrand holds leadership through scale and format consistency
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KEY DATA FINDINGS

2025 DEVELOPMENTS

Structural pressures keep full-service restaurants flat despite pockets of chain-led innovation

INDUSTRY PERFORMANCE

Demand stagnates despite easing inflation
Ethnic-led premiumisation in chained full-service restaurants
Cost discipline outweighs expansion ambitions

WHAT'S NEXT?

Stagnation is set to persist
Platform dependence is likely to deepen
Sustainability becomes a licence to operate

COMPETITIVE LANDSCAPE

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Limited-Service Restaurants in France

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2025 DEVELOPMENTS

Value-led formats keep limited-service restaurants ahead as consumers trade down

INDUSTRY PERFORMANCE

Budgets push diners towards low-ticket formats

Momentum broadens as Latin American and ice cream chains while premiumisation continues

Value menus and low-cost bundles intensify as digital ordering reduces labour exposure

WHAT'S NEXT?

Limited-service restaurants set to see further expansion

Delivery and takeaway will remain vital but see moderated growth unless pricing resets

Corporate social responsibility, health and sustainability to intensify as differentiators

COMPETITIVE LANDSCAPE

McDonald's remains number one as momentum slows amid boycotts and value menus

French tacos and fried chicken chains accelerate, led by aggressive expansion

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Self-Service Cafeterias in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Category remains constrained by mall footfall, even as motorway traffic lifts transport-led sites

INDUSTRY PERFORMANCE

Mall-based footfall weakens performance drivers

Motorway recovery lifts transport-led cafeterias

Value-for-money abundance supports demand

WHAT'S NEXT?

Commercial zones will cap near-term momentum

Scaling digital self-service set to ease bottlenecks

High-end buffets likely to grow only where volume holds

COMPETITIVE LANDSCAPE

Flunch defends leadership through format renewal

Ikea accelerates restaurant performance through events and immersive concepts

Motorway operators gain momentum, with independents more resilient than expected

CATEGORY DATA

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Street Stalls/Kiosks in France

KEY DATA FINDINGS

2025 DEVELOPMENTS

Street stalls/kiosks builds on events and office footfall in 2025, but tighter rules raise the bar for operators

INDUSTRY PERFORMANCE

Value sales rise on events recovery and continued office return

Festival-led pitches deliver the strongest uplift

Low entry barriers keep supply expanding, but attrition remains high

WHAT'S NEXT?

Slowed growth forecast thanks to tougher economics and tighter rules
New formats set to reshape fulfilment beyond classic trucks
Sustainability and ethnic cuisines will drive concept renewal

COMPETITIVE LANDSCAPE

Relay keeps leadership via transport hubs and convenience missions
Le Kiosque à Pizza grows with an unusual operator model
Bakery-focused chains expand faster and defend operational stability

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[Consumer Foodservice By Location in France](#)

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

CATEGORY DATA

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