



Euromonitor  
International

# Limited-Service Restaurants in France

March 2026

Table of Contents

## Limited-Service Restaurants in France - Category analysis

### KEY DATA FINDINGS

#### 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

Independent limited-service restaurants outperforms chains, but novelty risk increases

#### CATEGORY DATA

Table 1 - Limited-Service Restaurants by Category: Units/Outlets 2020-2025

Table 2 - Sales in Limited-Service Restaurants by Category: Number of Transactions 2020-2025

Table 3 - Sales in Limited-Service Restaurants by Category: Foodservice Value 2020-2025

Table 4 - Limited-Service Restaurants by Category: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Limited-Service Restaurants by Category: % Transaction Growth 2020-2025

Table 6 - Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2022-2025

Table 9 - Forecast Limited-Service Restaurants by Category: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2025-2030

Table 12 - Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

#### DISCLAIMER

## [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

## MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

## DISCLAIMER

## SOURCES

Summary 1 - Research Sources

## 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 focussing 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/limited-service-restaurants-in-france/report](http://www.euromonitor.com/limited-service-restaurants-in-france/report).