



# HW Soft Drinks in France

December 2025

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## HW Soft Drinks in France - Category analysis

### KEY DATA FINDINGS

#### 2024 DEVELOPMENTS

Weather volatility and affordability pressures shape health and wellness soft drinks

#### INDUSTRY PERFORMANCE

Climate sensitivity and sugar reduction define health and wellness soft drinks

Natural soft drinks face structural distrust despite long-standing appeal

Good source of minerals shifts towards functional soft drinks

#### WHAT'S NEXT

Innovation and reduced sugar underpin future health and wellness growth

Natural soft drinks face prolonged pressure from trust and environmental concerns

Good source of minerals expands through functional and hybrid innovation

#### CATEGORY DATA

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#### Health and Wellness in France - Industry Overview

### EXECUTIVE SUMMARY

Health and wellness shifts towards pragmatism, affordability and everyday relevance

#### INDUSTRY PERFORMANCE

Sugar reduction, reformulation and clean labels dominate health and wellness performance

Affordability pressures reshape premium health claims and consumption patterns

#### WHAT'S NEXT

Health and wellness growth will be driven by mainstream integration and functional relevance

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