



Carbonates in France

December 2025

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Navigating decline, taxation, and niche growth areas

INDUSTRY PERFORMANCE

Another challenging year for carbonates despite the favourable weather

Navigating the impact of the updated 2025 soda tax

WHAT'S NEXT?

Sugar backlash and "soda tax" to further dampen the growth potential of carbonates

Exploration of functional carbonates and sustainable production

Natural reduced sugar options offer greater potential in cola carbonates

COMPETITIVE LANDSCAPE

Coca-Cola Entreprises SA retains dominance but loses further share

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Forecourt retailers and vending driven by impulse purchases

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EXECUTIVE SUMMARY

Growth amidst economic caution, health concerns, and innovation

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Weather-driven growth amidst economic caution and shifting trends
Sugar concerns and "soda tax" impact
Illegal practices and increased regulatory scrutiny
Health and wellness drives new soft drink innovations in France

WHAT'S NEXT?

Soft drinks in France must navigate climate, taxes, and health trends
Economic headwinds versus event-driven recovery
Sustainability challenges and the rise of non-alcoholic options

COMPETITIVE LANDSCAPE

Neptune strengthens lead in soft drinks with Cristaline's success; Coca-Cola navigates sugar concerns and supply disruptions
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