



Euromonitor
International

Cafés/Bars in France

March 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

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

Portfolio structure strengthens rollout capability and boosts beer-led growth

Chains outperform independents as new concepts scale beyond traditional cafés

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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

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Independent outlets face cost pressure, while chains recover faster

Independent limited-service restaurants remains the exception

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