



# Concentrates in France

December 2025

Table of Contents

## Concentrates in France - Category analysis

### KEY DATA FINDINGS

#### 2025 DEVELOPMENTS

Trends, growth drivers, and future outlook for concentrates

#### INDUSTRY PERFORMANCE

Volume dips while value rises amidst inflationary pressures

Active lifestyles fuel dynamic growth in powder concentrates

#### WHAT'S NEXT?

Navigating predicted decline with core strengths and strategic innovation

Driving powder volumes through sports and technical innovation

How concentrates will evolve with reduced sugar trend and brand licensing

#### COMPETITIVE LANDSCAPE

Teisseire's strategic rebound against private label in concentrates

How key brands can help redefine French concentrates

#### CHANNELS

Segmented distribution for hypermarkets and health and beauty specialists

E-commerce's ascendancy in local concentrates retail

Concentrates Conversions

Summary 1 - Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

#### CATEGORY DATA

Table 1 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2020-2025

Table 2 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2020-2025

Table 3 - Off-trade Sales of Concentrates by Category: Value 2020-2025

Table 4 - Off-trade Sales of Concentrates by Category: % Value Growth 2020-2025

Table 5 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2022-2025

Table 6 - NBO Company Shares of Off-trade Concentrates: % Value 2021-2025

Table 7 - LBN Brand Shares of Off-trade Concentrates: % Value 2022-2025

Table 8 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2025

Table 9 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2022-2025

Table 10 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2025

Table 11 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2022-2025

Table 12 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2025-2030

Table 13 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2025-2030

Table 14 - Forecast Off-trade Sales of Concentrates by Category: Value 2025-2030

Table 15 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2025-2030

#### COUNTRY REPORTS DISCLAIMER

## Soft Drinks in France - Industry Overview

### 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  
Red Bull's dynamic performance and strategic success in energy drinks

## CHANNELS

Hypermarkets leads distribution amidst fierce price competition  
Dynamic channel performance sees forecourts surge and e-commerce evolve  
Foodservice vs retail split

## MARKET DATA

Table 16 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025  
Table 17 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025  
Table 18 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025  
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025  
Table 20 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025  
Table 21 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025  
Table 22 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025  
Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025  
Table 24 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025  
Table 25 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025  
Table 26 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025  
Table 27 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025  
Table 28 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025  
Table 29 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025  
Table 30 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025  
Table 31 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025  
Table 32 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025  
Table 33 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025  
Table 34 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025  
Table 35 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025  
Table 36 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025  
Table 37 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025  
Table 38 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025  
Table 39 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025  
Table 40 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025  
Table 41 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025  
Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030  
Table 43 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030  
Table 44 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030  
Table 45 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030  
Table 46 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030  
Table 47 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030  
Table 48 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030  
Table 49 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030  
Table 50 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030

## APPENDIX

Fountain sales in France

## COUNTRY REPORTS DISCLAIMER

## SOURCES

Summary 2 - 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/concentrates-in-france/report](http://www.euromonitor.com/concentrates-in-france/report).