



**Euromonitor
International**

Bottled Water in France

December 2025

Table of Contents

KEY DATA FINDINGS

2025 DEVELOPMENTS

Bottled water in France: 2025 performance, future outlook and key trends

INDUSTRY PERFORMANCE

Rebound for bottled water following a challenging 2024

Still bottled water's dominance and segment innovation

WHAT'S NEXT?

Challenging outlook for bottled water, but innovation in functional and flavoured varieties offers growth potential

The future of bottled water amidst regulatory and environmental pressures

Targeted marketing and bold innovation as potential growth drivers

COMPETITIVE LANDSCAPE

Neptune consolidates leadership, while Groupe Danone makes further gains

Mont Roucou is a resilient performer in bottled water's challenging 2025

CHANNELS

Hypermarkets leads distribution, while sales in forecourt retailers skyrocket from low base

CATEGORY DATA

Table 1 - Off-trade Sales of Bottled Water by Category: Volume 2020-2025

Table 2 - Off-trade Sales of Bottled Water by Category: Value 2020-2025

Table 3 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2020-2025

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

Table 5 - NBO Company Shares of Off-trade Bottled Water: % Volume 2021-2025

Table 6 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2022-2025

Table 7 - NBO Company Shares of Off-trade Bottled Water: % Value 2021-2025

Table 8 - LBN Brand Shares of Off-trade Bottled Water: % Value 2022-2025

Table 9 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2025-2030

Table 10 - Forecast Off-trade Sales of Bottled Water by Category: Value 2025-2030

Table 11 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2025-2030

Table 12 - Forecast Off-trade Sales of Bottled Water 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 13 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2020-2025
Table 14 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2020-2025
Table 15 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2020-2025
Table 16 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2020-2025
Table 17 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2025
Table 18 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2025
Table 19 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2025
Table 20 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2025
Table 21 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2020-2025
Table 22 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2020-2025
Table 23 - Off-trade Sales of Soft Drinks by Category: Value 2020-2025
Table 24 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2020-2025
Table 25 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2020-2025
Table 26 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2020-2025
Table 27 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2021-2025
Table 28 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2022-2025
Table 29 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2021-2025
Table 30 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2022-2025
Table 31 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2025
Table 32 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2022-2025
Table 33 - NBO Company Shares of Off-trade Soft Drinks: % Value 2021-2025
Table 34 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2022-2025
Table 35 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2020-2025
Table 36 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2020-2025
Table 37 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2020-2025
Table 38 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2025
Table 39 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2025-2030
Table 40 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2025-2030
Table 41 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2025-2030
Table 42 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2025-2030
Table 43 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2025-2030
Table 44 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2025-2030
Table 45 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2025-2030
Table 46 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2025-2030
Table 47 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2025-2030
Table 48 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2025-2030

APPENDIX

Fountain sales in France

COUNTRY REPORTS 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/bottled-water-in-france/report.