



Limited-Service Restaurants in France

March 2026

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Limited-Service Restaurants in France - Category analysis

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2025 DEVELOPMENTS

Value-led formats keep limited-service restaurants ahead as consumers trade down

INDUSTRY PERFORMANCE

Budgets push diners towards low-ticket formats

Momentum broadens as Latin American and ice cream chains while premiumisation continues

Value menus and low-cost bundles intensify as digital ordering reduces labour exposure

WHAT'S NEXT?

Limited-service restaurants set to see further expansion

Delivery and takeaway will remain vital but see moderated growth unless pricing resets

Corporate social responsibility, health and sustainability to intensify as differentiators

COMPETITIVE LANDSCAPE

McDonald's remains number one as momentum slows amid boycotts and value menus

French tacos and fried chicken chains accelerate, led by aggressive expansion

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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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