

## **Soft Drinks in France**

Market Direction | 2023-11-30 | 99 pages | Euromonitor

### **AVAILABLE LICENSES:**

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

### **Report description:**

Soft drinks continued to perform well in total current value terms in France in 2023, though its performance was significantly more muted in volume terms. Volume sales were dampened by the high rate of inflation, the ongoing war in Ukraine and the fact that the summer saw a much more limited heatwave than in the previous year. In fact, the northern half of the country saw rather bad weather from June to September 2023, providing less favourable conditions for sales of soft drinks.

Euromonitor International's Soft Drinks in France report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2018-2022), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution, packaging or pricing issues. Forecasts to 2027 illustrate how the market is set to change.

Product coverage: Asian Speciality Drinks, Bottled Water, Carbonates, Concentrates, Energy Drinks, Juice, RTD Coffee, RTD Tea, Sports Drinks.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- \* Get a detailed picture of the Soft Drinks market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop reliable information resources to help drive informed strategic planning.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Table of Contents:

Soft Drinks in France  
Euromonitor International  
December 2023

### List Of Contents And Tables

#### SOFT DRINKS IN FRANCE

##### EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

##### MARKET DATA

Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2022

Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2022

Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2022

Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2022

Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 □Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 □Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 □Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 □Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 □Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 □NBO Company Shares of Total Soft Drinks (RTD): % Volume 2019-2023

Table 16 □LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2020-2023

Table 17 □NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2019-2023

Table 18 □LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2020-2023

Table 19 □NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 20 □LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 21 □NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 22 □LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 23 □Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 24 □Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 25 □Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 26 □Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 27 □Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 28 □Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 29 □Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 30 □Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 31 □Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 32 □Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 33 □Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 34 □Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 35 □Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 36 □Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

## APPENDIX

Fountain sales in France

DISCLAIMER

SOURCES

Summary 1 Research Sources

CARBONATES IN FRANCE

KEY DATA FINDINGS

2023 DEVELOPMENTS

A positive year thanks to cola carbonates after an astonishing 2022

White carbonates also doing well, driven more by tonics than lemonade

CCEP is roaring ahead, while Suntory works well

PROSPECTS AND OPPORTUNITIES

The Olympic Games and an expected peak during summer 2024

Great pressure expected on trading/negotiation and further drop expected in lemonade/lime

Reduced sugar carbonates will continue to progress, notably at the expense of juices

CATEGORY DATA

Table 37 Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023

Table 38 Off-trade vs On-trade Sales of Carbonates: Value 2018-2023

Table 39 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023

Table 40 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023

Table 41 Off-trade Sales of Carbonates by Category: Volume 2018-2023

Table 42 Off-trade Sales of Carbonates by Category: Value 2018-2023

Table 43 Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023

Table 44 Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023

Table 45 Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023

Table 46 □Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023

Table 47 □NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023

Table 48 □LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023

Table 49 □NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 50 □LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 51 □Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 52 □Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 53 □Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 54 □Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 55 □Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028

Table 56 □Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

JUICE IN FRANCE

KEY DATA FINDINGS

2023 DEVELOPMENTS

Another bad year for juices

Juice drinks - the exception to the rule once again

Ongoing decline for most brands and private label

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## PROSPECTS AND OPPORTUNITIES

Grey outlook for juices, other than juice drinks

Tough negotiations and the risk of further shortages

Where can juices find additional growth?

### CATEGORY DATA

Table 57 Off-trade Sales of Juice by Category: Volume 2018-2023

Table 58 Off-trade Sales of Juice by Category: Value 2018-2023

Table 59 Off-trade Sales of Juice by Category: % Volume Growth 2018-2023

Table 60 Off-trade Sales of Juice by Category: % Value Growth 2018-2023

Table 61 NBO Company Shares of Off-trade Juice: % Volume 2019-2023

Table 62 LBN Brand Shares of Off-trade Juice: % Volume 2020-2023

Table 63 NBO Company Shares of Off-trade Juice: % Value 2019-2023

Table 64 LBN Brand Shares of Off-trade Juice: % Value 2020-2023

Table 65 Forecast Off-trade Sales of Juice by Category: Volume 2023-2028

Table 66 □Forecast Off-trade Sales of Juice by Category: Value 2023-2028

Table 67 □Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028

Table 68 □Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

## BOTTLED WATER IN FRANCE

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Understandable lower growth of bottled water after the heatwave of 2023

Flavoured bottled water - still small but dynamic

The leading brand, Cristaline, forges ahead, while Ogeu seizes the opportunity of the temporary absence of Perrier

## PROSPECTS AND OPPORTUNITIES

After the Olympics, it will probably not be so easy for bottled water

Functional bottled water is not dead, while flavoured bottled water has room for growth

Adapting to CSR and reassuring consumers to avoid plastic bashing

### CATEGORY DATA

Table 69 Off-trade Sales of Bottled Water by Category: Volume 2018-2023

Table 70 Off-trade Sales of Bottled Water by Category: Value 2018-2023

Table 71 Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023

Table 72 Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023

Table 73 NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023

Table 74 LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023

Table 75 NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023

Table 76 LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023

Table 77 Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028

Table 78 □Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028

Table 79 □Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Table 80 □Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

## SPORTS DRINKS IN FRANCE

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sports drinks post modest volume growth in 2023 despite many sports events

Lack of support and competition from other soft drinks

Powerade leads in a concentrated competitive landscape

## PROSPECTS AND OPPORTUNITIES

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

2024 will be a key year for sports drinks

More private label in sports superstores, maybe less in vending inside gyms

More sustainable products expected in terms of recipes and packaging

#### CATEGORY DATA

Table 81 Off-trade Sales of Sports Drinks: Volume 2018-2023

Table 82 Off-trade Sales of Sports Drinks: Value 2018-2023

Table 83 Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023

Table 84 Off-trade Sales of Sports Drinks: % Value Growth 2018-2023

Table 85 NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023

Table 86 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023

Table 87 NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023

Table 88 LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023

Table 89 Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028

Table 90 □Forecast Off-trade Sales of Sports Drinks: Value 2023-2028

Table 91 □Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028

Table 92 □Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

#### ENERGY DRINKS IN FRANCE

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Energy drinks does not lose its momentum despite inflation

Reduced sugar products progress, as well as new flavours

Red Bull remains the boss, but Monster is gaining ground

##### PROSPECTS AND OPPORTUNITIES

Despite some threats, still plenty of room for growth

The Olympic Games of Paris will benefit the category

New channels and outlets to find

#### CATEGORY DATA

Table 93 Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 94 Off-trade Sales of Energy Drinks: Value 2018-2023

Table 95 Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 96 Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 97 NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 98 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 99 NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 100 LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 101 Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 102 □Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 103 □Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 104 □Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

#### CONCENTRATES IN FRANCE

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

A still robust value increase in 2023 for concentrates due largely, but not solely, to inflation

More mint, lemon and fruit and less sugar

Almost all players progress and innovate over 2022-2023

##### PROSPECTS AND OPPORTUNITIES

Still appreciable growth expected over 2023-2028 despite some breaks

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

More players and concepts to knock down the door of concentrates

Possible slowdown of powder concentrates after the return of races and competitions in 2021-2022

#### CATEGORY DATA

##### Concentrates Conversions

Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 130 Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 131 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 132 Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 133 Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 134 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 135 NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 136 LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 137 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 138 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 139 □NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 140 □LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 141 □Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 142 □Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 143 □Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 144 □Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

#### RTD TEA IN FRANCE

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

An unexpected change for RTD tea in 2023

Ongoing revolution in packaging - rPET is the key focus, as well as healthy recipes

Lipton's challengers rush into the breach opened by the category

##### PROSPECTS AND OPPORTUNITIES

Still plenty of room for growth thanks to warmer temperatures, under-developed potential, healthy image and the Olympic Games in Paris in 2024

Kombucha has not said its last word

Oasis tea, new flavours and less seasonal consumption are other factors favouring the potential of RTD tea

#### CATEGORY DATA

Table 105 Off-trade Sales of RTD Tea by Category: Volume 2018-2023

Table 106 Off-trade Sales of RTD Tea by Category: Value 2018-2023

Table 107 Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023

Table 108 Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023

Table 109 Leading Flavours for Off-trade RTD Tea: % Volume 2018-2023

Table 110 NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023

Table 111 LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023

Table 112 NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023

Table 113 LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023

Table 114 □Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028

Table 115 □Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028

Table 116 □Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028

Table 117 □Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

#### RTD COFFEE IN FRANCE

##### KEY DATA FINDINGS

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## 2023 DEVELOPMENTS

Too expensive and in direct competition with energy drinks and coffee

Possible development in alternative channels to multiple grocery retailers

Starbuck remains in control against challengers

## PROSPECTS AND OPPORTUNITIES

Limited recovery expected as high prices remaining an obstacle to wider acceptance

The fad for cold brew coffee could be over

Possible disinterest from new investors in the short term

## CATEGORY DATA

Table 118 Off-trade Sales of RTD Coffee: Volume 2018-2023

Table 119 Off-trade Sales of RTD Coffee: Value 2018-2023

Table 120 Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023

Table 121 Off-trade Sales of RTD Coffee: % Value Growth 2018-2023

Table 122 NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023

Table 123 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023

Table 124 NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023

Table 125 LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023

Table 126 Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028

Table 127 □Forecast Off-trade Sales of RTD Coffee: Value 2023-2028

Table 128 □Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028

Table 129 □Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

## Soft Drinks in France

Market Direction | 2023-11-30 | 99 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

☐ \*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-02"/>
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com