

France Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The France Foodservice Market size is estimated at 77.28 billion USD in 2024, and is expected to reach 104.08 billion USD by 2029, growing at a CAGR of 6.13% during the forecast period (2024-2029).

High coffee consumption in the country, attracts a large number of international players driving the growth of cafes.

- Quick service restaurants held the largest market share in 2022. The market expansion can be attributed to the continuous growth in the preference for fast food in the country. Burgers are among the most popular cuisines among the French, with around 1 billion burgers eaten yearly. Their consumption is increasing annually by 10% in France. The inclination of the population toward pizza is also leading to the growth of pizza establishments, owing to the significant growth of quick service restaurants. The segment is expected to record a CAGR of 6.57%, by value, during the forecast period.

- The cafes & bars segment in the country is projected to record a CAGR of 7.53%, by value, during the forecast period. The consumption of coffee is generally high in the country, and around 68% of French people were regular coffee drinkers in 2022. The increasing consumer preference for various cuisines is attracting F&B supply chains, including domestic and international players in the country. The progress of the tourism industry has been another important factor that has led to the rise in the demand for wine, seafood, beef, and cheese, which are primary ingredients for several international cuisines.

- Full service restaurants are also one of the major foodservice types in the country. Asian and European cuisines together accounted for a major share of 66.69% in 2022. Asian cuisine is one of the most popular foreign cuisines in France, with the presence of many Asian restaurants (Japanese, Chinese, Thai, etc.) across the country. Many renowned French chefs have opened Asian or Asian-Europe fusion restaurants, such as Cyril Lignac and Joel Robuchon, where French meals are mixed with Asian flavors, such as the famous Asian tartar.

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France Foodservice Market Trends

France's QSR industry is growing, driven by demand for food trucks and diverse menu options

- The number of quick service restaurant outlets in France experienced a growth of approximately 12.69% from 2017 to 2022, attributed to the increasing demand for street food options, particularly in urban centers. In addition to the traditional offerings of hamburgers, pizzas, and fries, there has been an expansion in the variety of choices available, including salads, sushi, sandwiches, wraps, and Buddha bowls. The rising popularity of vegetarian, vegan, gluten-free, and lactose-free options has also contributed to the success of food trucks. Notably, well-established QSR chains like Starbucks, McDonald's, and Pizza Hut have a significant presence in the country, with 2,277, 1,382, 1,194, and 544 outlets, respectively, as of January 2023.
- Cloud kitchen outlets are currently experiencing the fastest growth rate and are projected to register a CAGR of 7.36% during the forecast period. This growth can be attributed to the increased demand for online food deliveries, especially in the post-pandemic era. The widespread adoption of online food delivery services, facilitated by the growing internet penetration in France, has played a significant role in driving the expansion of the cloud kitchen market. With the continuous advancement of technology, the popularity of cloud kitchens is expected to remain strong in the future.
- In 2022, cafes and bars held the second-largest market share at 27.56%. Coffee consumers in France have shown a growing preference for higher-quality and sustainably produced coffees. Around 65% of coffee consumers in France believe that coffee prepared by skilled baristas adds value to their purchase, while about 40% of consumers are willing to pay a premium price for high-quality coffee. The import of coffee to France also registered an average annual growth rate of 6.4% between 2017 and 2021.

French full service restaurants offer local cuisines and exclusive experiences, such as quinoa bowls, poulet tandoori, and bouillabaisse

- In France, the average order price for full service restaurants (FSR) was observed to be the highest among different foodservice types in 2022, at USD 34.17. Consumers in France have a strong preference for supporting local businesses, particularly small establishments that prioritize local sourcing. With less corporate oversight, FSRs have the freedom to experiment with menu items, promotions, and community outreach programs, helping build long-term customer loyalty among local residents. To stand out from the competition, FSRs are more inclined to develop unique menus, dining areas, and experiences exclusive to their business. Popular dishes offered by FSR cuisines in France include the Quinoa Bowl, Poulet Tandoori, and Bouillabaisse, priced at USD 16, USD 10.5, and USD 25 per 300 g, respectively.
- The demand for cloud kitchens is expected to increase in France due to people's busy schedules and the growing penetration of e-commerce channels. The rise of online food delivery platforms like Uber Eats, Deliveroo, Just Eat, and Glovo has led to an increased demand for online food delivery, thereby driving the need for cloud kitchens. Burgers and pizza were popular dishes ordered through cloud kitchens across the country in 2022. These popular menu items are priced at almost half the average order value. The popularity of fast food in recent years has prompted quick service restaurant (QSR) chains in France to expand their menu selections. The top QSR chains in the country include McDonald's, Burger King, Domino's, and Subway, with 1530, 467, 431,

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and 406 outlets, respectively. Popular fast-food items such as burgers, pizzas, cheesecake, and baguettes have experienced growth in both QSRs and cloud kitchens due to rising demand. Burgers and pizza are priced at USD 12.5 and USD 13.8 per serving, respectively, in the country.

France Foodservice Industry Overview

The France Foodservice Market is fragmented, with the top five companies occupying 3.98%. The major players in this market are Areas SAU, Domino's Pizza Enterprises Ltd, Groupe Bertrand, Groupe Le Duff and McDonald's Corporation (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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