

Required Report: Required - Public Distribution

Date: September 30, 2026

Report Number: FR2026-0010

Report Name: Retail Foods Annual

Country: France

Post: Paris

Report Category: Retail Foods

Prepared By: Laurent J. Journo

Approved By: Elizabeth Autry

Report Highlights:

In 2025, the French agri-food market continued to adjust to the inflationary period of 2022–24. Consumer inflation slowed to 0.9 percent, while food prices increased 1.2 percent. Despite lower inflation, consumers remained price-sensitive, with high demand for private-label products, promotions, and lower-priced options. France's AGECL law is progressively reducing single-use plastic packaging and promoting recyclable and reusable alternatives, requiring the food industry to adapt. France's food retail sector remains large and diverse. In 2025, large general food retailers represented 58.6 percent of food retail sales, while specialized food stores and commercial artisans accounted for 20.4 percent. The market offers opportunities for U.S. exporters of differentiated, premium, innovative, and specialty products, provided they comply with EU/French regulations.

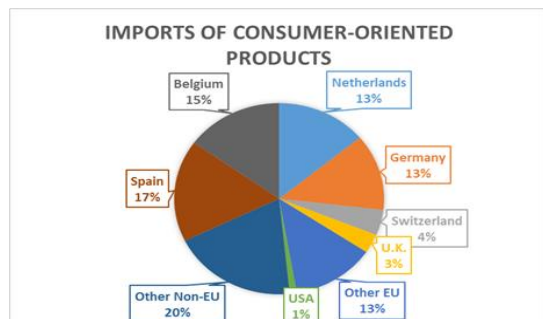
Market Fact Sheet: France

Executive Summary

In 2025, France's economy expanded modestly, growing by about 0.9 percent, slightly above expectations but slower than in 2024. France remains one of the largest economies in the world and the second largest in the EU by GDP, with strong industrial and agricultural sectors.

Imports of Consumer-Oriented Products

Primary imports from outside the EU include oilseeds, fruit, and distilled spirits. Imports from the EU are primarily meat, dairy, and vegetables. Recent data indicates that France's traditional agri-food trade surplus eroded sharply in 2025, with the sector nearing or possibly recording a deficit for the first time in decades. French imports from the United States reached \$1 billion in 2025, led by seafood, tree nuts, soybeans and alcoholic beverages.



Food Processing Industry

France's food processing sector encompasses approximately 17,000 companies with total annual sales exceeding \$290 billion. Small- and medium-sized enterprises (SMEs) account for almost 98 percent of the industry. It is the leading sector of the French economy, with a strong reputation for quality and innovation.

Food Retail Industry

In 2025, approximately 70 percent of all retail food sales in France were in the hyper-supermarket and discount store format. E-commerce food sales represent around 6 percent of total retail food sales.

Food Service Industry

France's HRI sector recorded \$116 billion in sales revenue in 2025. Hotels and restaurants account for approximately 58 percent of sales, while institutional food service represents 20 percent.

Quick Facts CY 2025

Imports of Consumer-Oriented Products (USD billion): 56.5. This figure does not include U.S. products exported to France transshipped through other EU countries.

List of Top 10 Growth Products in France

Seafood, almonds, peanuts, pistachios, grapefruit, sauces, pet food, food preparations, beer, wine, and whiskey.

Food Industry by Channels (USD billion)

Food Industry Output	290
Food and Ag. Exports	96.5
Food and Ag. Imports	90
Retail	353
Food Service	116

Top 10 Host Country Retailers

1. Carrefour	6. Lidl
2. E. Leclerc	7. Aldi
3. Intermarché	8. Hyper U
4. Auchan	9. Netto
5. Casino	10. Super U

GDP/Population

Population (millions): 68

GDP (trillions USD): 3.3

GDP per capita (USD): 48,930

Sources: TDM, ANIA

Strengths	Weaknesses
France is one of the largest consumer markets in Europe.	U.S. exporters face competition from EU FTA partners who benefit from tariff-free market access.
Opportunities	Challenges
A large food-processing industry seeking a wide range of ingredients.	Non-tariff barriers can complicate the process for exporting to France.

Contact : FAS Paris, France AgParis@usda.gov

I. MARKET SUMMARY

Overall Market Summary

France's food retail market entered 2025 with easing inflation; overall inflation fell from 2.0 percent in 2024 to 0.9 percent in 2025, while food prices rose about 1.2 percent. However, the improvement in inflation did not fully restore household purchasing power, which declined by 0.7 percent. The Banque de France projects inflation of 2.5 percent in 2026, significantly above the very low inflation recorded in 2025.

French economic growth remained modest. GDP increased by 1.5 percent in 2024 and 0.8 percent in 2025. Current forecasts point to continued weak growth in 2026. The OECD projects GDP growth of 0.7 percent, reflecting the impact of higher energy prices and geopolitical uncertainty.

Food remains an important component of household spending. In 2025, French households spent approximately €192.8 billion on food and non-alcoholic beverages, equivalent to 12.5 percent of household final consumption expenditures. Food consumption increased 1.5 percent in volume in 2025, although consumption of some categories, notably meat and fish, continued to decline.

Price remains a major factor shaping purchasing decisions. After the sharp food-price increases of 2022–23, consumers continue to seek value, compare prices across retailers, and make greater use of promotions and private-label products. At the same time, the market is not simply shifting from national brands to low-cost products. In 2025, both national brands and private labels recorded unit-volume growth, with national brands increasing 1.9 percent and private labels 1.8 percent. French consumers are also increasingly shopping across multiple retail formats.

Consumer interest in sustainability, local sourcing, and organic products remains important, although price considerations have affected purchasing patterns. The organic market grew in 2025. Organic food sales reached approximately €13 billion in 2025, up 3.6 percent from 2024, representing 5.8 percent of household food consumption. Thus, while affordability remains a significant consideration, organic and sustainably produced foods continue to have an established position in the French market.

France's retail food sector is diverse and highly competitive, encompassing hypermarkets, supermarkets, discount stores, convenience stores, specialized food retailers, traditional outlets, open-air markets, and e-commerce. The market is undergoing significant restructuring as consumers diversify where they shop and retailers adapt their store formats. In 2025, large general food retailers accounted for 58.6 percent of food retail sales, while specialized food stores and commercial artisans accounted for 20.4 percent.

The performance of individual formats varies considerably. In 2025, sales by supermarkets increased 2.2 percent in volume, while hypermarket sales declined 0.6 percent for the fourth consecutive year. Small general food stores and frozen-food retailers recorded particularly strong growth of 5.0 percent, while bakeries and butcher shops also continued to perform well. These developments reflect consumers' increasing use of proximity stores alongside larger retailers.

E-commerce and omnichannel shopping continue to expand. Reports estimate that e-commerce now accounts for 13.3 percent of French consumer spending on daily-used consumer goods, or approximately \$21 billion, making France one of Europe's more digitally developed grocery markets. At

the same time, retailers continue to invest in convenience formats, online ordering, drive-through/pick-up services, and private-label ranges.

The French food retail market remains large and highly developed. The French National Institute of Statistics and Economic Studies (INSEE) estimates 2025 sales for predominantly food retail stores at \$353 billion, up 2.7 percent from 2024. Large general food retailers accounted for 58.6 percent of food retail sales, while specialized food stores and commercial artisans accounted for 20.4 percent. Supermarkets gained market share, while hypermarkets experienced their fourth consecutive year of declining sales volumes.

The French food retail sector is also highly concentrated. The five largest retail groups accounted for approximately 79 percent of the market in 2025, with Leclerc at 23.5 percent, Carrefour at 21.8 percent, and Les Mousquetaires at 18.1 percent. This concentration makes relationships with major retail groups particularly important for U.S. suppliers seeking broad market access.

Key market drivers and consumption trends

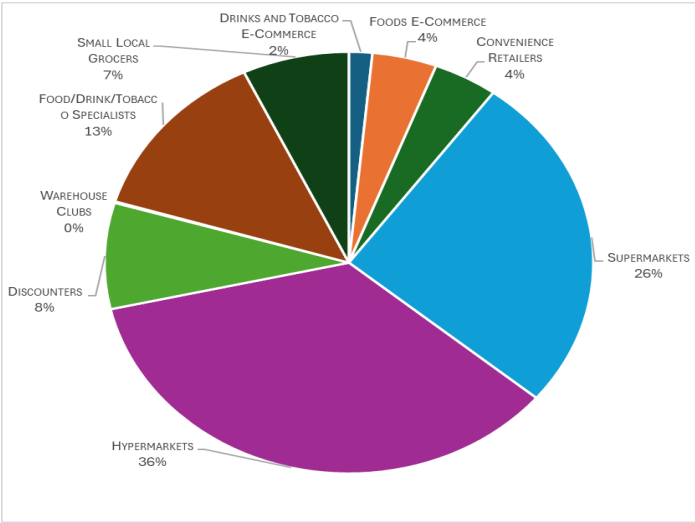
- More time spent working and the rising number of single households are driving the demand for convenient ready-to-eat meals, desserts, and baking mixes.
- The growing population and increased health consciousness of consumers is fueling the demand for health and wellness products, as well as functional food products.
- Fair trade and organic products are still popular. France is the second largest organic market in Europe.
- Ethnic foods, health and super foods, “free-from” products (e.g., gluten or lactose free), and locally grown are further trends that are attracting more and more French consumers.
- There is an increasing share of consumers who view their purchasing decision as political or life-style statements, such as no GMOs, free-range eggs, and vegetarian or vegan diet foods.
- Consumers increasingly require traceability and information about production methods.

Table 1: Advantages and Challenges

Advantages	Challenges
A significant portion of French households can afford imported food products.	Lack of brand and variety awareness of U.S. food products by consumers.
The French food retail industry is looking for new imported food products.	Although of interest, introducing new-to-market brands and products is not easy.
American food and food products are increasingly popular in France.	Complying with European and French regulations.
Efficient domestic distribution systems.	Domestic and intra-EU imports dominate the supply chain.
French consumers demand high quality, innovative, healthy products.	Adapting products to French consumers’ tastes and expectations.
Changing lifestyles, demographic changes, and the economic crisis fuel growth in the hard discounters.	Adapting U.S. products to French consumer needs regarding price, practicality, variety, quality, and packaging.

Retail Sales by Channel

Figure 1. Retail Market by Channel 2025



Source: Euromonitor

II. Road Map for Market Entry

U.S. exporters can gain market entry to the retail service sector in several ways, including representation by an importer, having their products placed in a central purchasing office catalog, and by selling to cash and carry outlets. Food buyers use central buying offices, importers, and cash and carry dealers to procure their products. The most common method of market entry is by using an experienced importer to place your product in the French market. The importer will verify that your product meets EU import requirements, such as labeling and ingredient regulations and will verify your financial reliability. If interested, the importer will engage in price negotiations. Both suppliers and importers need to discuss logistical requirements and the length of the contract.

FAS Paris maintains a list of importers; please email agparis@usda.gov and designate your company, state of production and sector of interest for more information. Importers often place your product in retail stores and with central purchasing offices. In France, it is common for large retailers to participate in a central purchasing office to share the costs of purchase and distributors. The central purchasing office also buys products directly from importers and distributors and provides them with retail outlets. You will find additional labeling rules on food allergens and nutritional products, packaging, container, food additives regulations and trade barriers [here](#).

Table 2: Major Food Related Trade Shows in France

Trade Show	Description	Location
Wine Paris – Vinexpo <u>USDA Branded Show</u> February 15-17, 2027 https://www.vinexposium.com/en/wineparis-vinexpo/ https://wineparis.com/newfront	International trade show for wine and spirits	Paris
Sandwich and Snack Show March 24-25, 2027 Error! Hyperlink reference not valid.	Trade show for snacks products	Paris

<u>SIAL (every two years) USDA endorsed</u> October 17-21, 2026 erich@imexmanagement.com	Leading food fair for retail trade, food service, and catering market	Paris
SIRHA January 21-25, 2027 https://www.sirha.com/en/	World's largest trade show for food service	Lyon

U.S. suppliers may also contact the following organizations for additional support:

State Regional Trade Groups (SRTG) are non-profit trade development organizations that help U.S. food producers and processors to enter overseas markets. They are funded by USDA/FAS and the private industry. They carry out promotional activities to increase exports of U.S. high-value food and agricultural products. For more information, contact the state regional trade group responsible for your state: <https://www.fas.usda.gov/state-regional-trade-groups>

The **U.S. Agricultural Export Development Council** is composed of U.S. commodity trade associations and other organizations, in addition to the SRTGs, with an interest in promoting U.S. agricultural exports. For an overview and additional information on the various Commodity Groups, you can go to www.usaedc.org. They regularly organize (reverse) trade missions, often organized around trade shows or other events, utilizing the Regional Agricultural Promotion Program (**RAPP**). They are also excellent platforms for U.S. suppliers of food ingredients to meet with foreign buyers.

Table 3: Profiles of Top Food Retailers

Retailer Name and Outlet Type	Ownership	2025 Sales (billion USD)	Location	No. of Outlets in France	Purchasing Agent Type
Carrefour (Hyper/Supermarkets, convenience, cash & carry)	French	103.4	France and foreign countries	6,766	Central purchasing/ Importers
E. Leclerc (Hyper/Supermarkets, convenience stores)	French cooperative	57.7	France and Europe	750	Central Buying office
Intermarché / Les Mousquetaires (Supermarkets, hard discount, convenience stores)	French	36.3	France and foreign countries	450	Direct/ Central Buying Office
Groupe Auchan (hyper/supermarkets, convenience stores)	French	36.3	France and foreign countries	450	Direct / Central Buying Office
Système U (Hyper/supermarkets and convenience stores)	French	32.5	France	1,900	Direct / Central Buying Office
Lidl France (Hard discounter)	German	18	France and Europe	1,620	Central Buying Office
Groupe Casino (Hyper/Supermarkets, hard discount + convenience stores)	French	9.3	France and foreign countries	6,484	Central Buying Office
Aldi France (Hard discounter)	German	7.5	France and foreign countries	1,300	Central Buying Office

Major Retailers:

1. Carrefour: Carrefour is one of the largest food retailers in France and remains a major international retailer, with operations in Europe and Latin America and partnerships in more than 30 additional countries. In 2025, Carrefour held approximately 21.8 percent of the French food retail market. The group reported \$48 billion in sales in France in 2025 and operated 6,766 stores under its banners in France, including 325 hypermarkets, 1,167 supermarkets, 5,084 convenience stores, 157 cash-and-carry outlets, and 33 soft-discount stores. Carrefour completed the integration of the former Cora and Match stores in 2025, further strengthening its French network.

2. E.Leclerc: E.Leclerc remained the leading food retailer in France in 2025, with approximately 23.5 percent market share. The cooperative generated \$59 billion in sales, excluding fuel, in 2025 and operates more than 870 stores in France, including hypermarkets, supermarkets, and smaller E.Leclerc Express formats. E.Leclerc also operates more than 990 drive and pedestrian-drive locations. The group sources products through its centralized purchasing organizations and is expanding its smaller-format and proximity-store network.

3. Intermarché: Intermarché is part of the Groupement Mousquetaires, a cooperative of independent retailers. Most Intermarché outlets are supermarkets, complemented by smaller formats and Netto discount stores. In 2025, Intermarché and Netto accounted for approximately 17.5 percent of the French food retail market and generated \$39 billion in sales in France, excluding fuel. The network comprised 2,417 Intermarché and Netto stores in France at the end of 2025. The group continued to expand through the integration of stores acquired from Casino.

4. Auchan: Auchan Retail is controlled by the Mulliez family and operates in several European and other international markets. France remains its largest individual market, although its French business has undergone significant restructuring. In 2025, Auchan Retail generated approximately \$36 billion in worldwide sales, including approximately \$19 billion in France. Auchan held approximately 8.4 percent of the French food retail market and continued to focus on restructuring its French hypermarket and supermarket network.

5. Coopérative U (formerly Système U): Coopérative U is a cooperative of independent retailers operating under the Hyper U, Super U, U Express, and Utile banners. In 2025, it generated \$32.5 billion in sales, excluding fuel, and represented approximately 12.7 percent of the French food retail market. The cooperative had 1,904 points of sale at the end of 2025. Private-label products remain an important part of its strategy, including categories such as beverages, frozen foods, ethnic foods, seafood, and other grocery products.

6. Groupe Casino: Casino has undergone major restructuring in recent years and is now primarily focused on convenience and urban retail in France. Its main French banners include Monoprix, Franprix, Casino, Spar, Vival, and Naturalia. Casino reported \$9.3 billion in consolidated sales in 2025. The group is investing in new convenience-store concepts, food-to-go, private-label products, and e-commerce.

7. Grand Frais: Grand Frais is a rapidly expanding French specialty food retailer focused on fresh products, including fruits and vegetables, fish, meat, dairy, and international foods. The chain had approximately 350 stores in France by 2025, compared with 316 in the earlier report. Its sales are not publicly disclosed at the group level; industry estimates placed 2024 sales at approximately \$5-6 billion, making Grand Frais a significant specialty-food retailer. The retailer's model relies on centralized purchasing and specialized suppliers, offering opportunities for U.S. products in selected categories.

8. Costco: Costco operates a membership warehouse-club model based on high-volume sales, a limited assortment, and competitive pricing. As of November 2025, Costco had three warehouses in France. The company has indicated plans to expand further in France, particularly in the Paris region and other major cities.

Convenience Stores: Convenience stores continue to be one of the fastest-growing segments of French food retail. According to reports, sales in the convenience-store channel increased approximately 5 percent in 2025 as urbanization, smaller households, and demand for proximity shopping continued to support the format. Carrefour alone had more than 5,000 convenience stores under its banners in France at the end of 2025, while Casino and Intermarché also maintain extensive convenience networks. Carrefour Proximité added approximately 400 new points of sale during 2025, bringing its French network to nearly 5,000 stores.

The French convenience sector therefore offers opportunities for U.S. suppliers of specialty, premium, ethnic, and innovative products, although purchasing is generally conducted through the retailers' centralized procurement organizations or through specialized distributors and wholesalers.

Other Types of Retailers: Specialized food stores and commercial artisans—including bakeries, butcher shops, fishmongers, specialty grocery stores, and other independent food retailers—remain an important part of the French food market. According to INSEE, specialized food stores and commercial artisans accounted for 20.4 percent of French food retail sales in 2025, while large general food retailers accounted for 58.6 percent. Specialized food retail generated approximately \$89 billion in sales in 2025, an increase of 6.3 percent in value from 2024.

Independent and neighborhood food stores are particularly relevant for specialty and premium imported products. These retailers generally source through wholesalers, specialized distributors, and wholesale markets, although some larger specialty retailers purchase directly from importers. Their smaller purchasing volumes can make them less attractive for commodity products but potentially valuable for differentiated U.S. products with a premium or specialty positioning.

Traditional gourmet retailers and specialty food stores, including La Grande Épicerie and other high-end delicatessens, are concentrated primarily in Paris and other major cities. They cater to higher-income consumers and provide opportunities for U.S. exporters of premium and specialty foods. These retailers generally work with importers and distributors, although some may purchase selected products directly.

Picard Surgelés: Picard is France's leading specialist frozen-food retailer and focuses exclusively on frozen foods for home consumption. The company reached 1,200 stores in France in April 2025 and continues to expand its network. Picard reported approximately \$2 billion in sales in 2025. The company offers opportunities for U.S. suppliers of frozen seafood, fruits and vegetables, fruit juices, and specialty

prepared foods, particularly through its private-label sourcing model. Picard primarily develops products with suppliers and manufacturers rather than functioning as a conventional importer.

III. Competition

Most exporters to the EU conduct market promotion activities in France. Products such as fresh or preserved fruits and vegetables, wine, beer, fish, and meat are commonly promoted in trade shows, advertisements, and supermarkets. Third countries promoting food products in France include Norway, Israel, Morocco, South Africa, Argentina, Brazil, and Canada.

Table 4: Overall Competitive Situation facing U.S. Suppliers, Calendar Year 2025

Product Category	2025 Total Imports (in million dollars)	Average Percentage Market Share Change (2025-2024)	Key Constraints over Market Development	Market Attractiveness for USA
HS 08. Fruits and nuts	\$236	Plus 29.2%	Competition from key established suppliers	U.S. products are considered as high quality and safe products. France is the leading European market for U.S. grapefruits; however, sales are impacted by high prices. The most popular nuts sold in France are almonds and pistachios. Most sales from the U.S. are bulk and for the processing industry.
HS 03. Fish and Seafood	\$191	Plus 1%	Competition from other suppliers	The United States ranks 7 th , far behind the U.K. and Norway; however, health benefits and quality of U.S. products offer opportunities for U.S. suppliers primarily for frozen Alaska Pollock fillets, fresh and frozen scallops, frozen surimi base, live lobster, and frozen salmon.
Distilled Spirits	\$104.5	Minus 22%	Competition from local production and imports from European countries. High Tariffs on hard alcohol.	U.S. whisky and bourbon are considered quality products; opportunities exist, but high tariffs have a negative impact on sales.
Wine	\$75.7	Minus 22%	Competition from domestic production and imports from European countries	The market remains a niche for U.S. suppliers, but opportunities exist to compete with other countries present in the market for quality wine.

Source: Trade Data Monitor /French Customs

IV. Best Product Prospects

Products identified as opportunities for U.S. Suppliers

- Fish and seafood: salmon, cod, lobster, scallops. Please see Fish and Seafood [report](#) for more information
- Citrus fruits and Nuts: grapefruit, almonds, pistachios, and other nuts
 - Salted and sweet snacks, confectionary products

- Spices, sauces, seasoning
- Wine and other alcoholic beverages
- Carbonated drinks, juices
- Pulses
- Canned fruit/vegetables, marmalade

Products not present in significant quantities but that have good sales potential

- **Organic foods:** The French organic food market reached approximately \$15 billion in 2025, up 3.6 percent from 2024, following a period of stabilization. Organic products represent approximately 5.8 percent of household food consumption.
- **Halal foods:** The French halal food market is estimated at approximately \$7 billion annually, including retail, specialty stores, butcher shops, and foodservice. In large and medium-sized supermarkets, halal sales are estimated at \$450–550 million annually. Recent industry data indicate that halal sales continue to grow faster than the overall food market, although a reliable current annual growth rate for the entire French halal market is not available.
- **Energy drinks:** The French energy-drink market was estimated at approximately \$1.1 billion in 2025. Available market research estimates annual growth at approximately 7–10 percent, depending on the market definition and forecast period.
- **Kosher foods:** Reliable France-specific market data for kosher foods is limited. One recent industry report places the French kosher food market at approximately \$225 million in 2025, with projected annual growth of around 1.5 percent through 2032. Given the wide variation among available market estimates, the figure should be treated as indicative rather than definitive.

Products not present because they face significant trade barriers

- Vitamin-enriched flour.
- Meat products with hormones,
- Poultry products.
- Biotech-derived products that are not approved in the EU.
-

For more information on product trade restrictions within the European Union, please refer to U.S./EU Mission Food and Agricultural Import Regulation and Standards Report ([FAIRS](#)).

V. Post Contact and Further Information

If you have any questions or comments regarding this report, need assistance exporting to France or desire French buyers contact lists, please get in touch with the U.S. Office of Agricultural Affairs in Paris:

U.S. Department of Agriculture, Foreign Agricultural Service
 Embassy of the United States of America
 32, rue Monceau 75008 Paris, France
 Phone : +33-1 4312 2245
 Email: agparis@fas.usda.gov

Attachments:

No Attachments