

SIGEP
VISION

BEYOND THE BILL:
FOODSERVICE
TRENDS IN FRANCE

Introduction

What's happening in food service in France?

In recent years, the foodservice industry has undergone a **profound transformation**. After the long wave of the pandemic, restaurants are gradually regaining market share, but must face new challenges: **inflation**, **changing consumer habits**, and a growing focus on health and sustainability.

French consumers are increasingly paying attention to what they eat, the origin of products and their price.

Quality remains essential, but choices are increasingly driven by **promotions**, labels like Nutri-Score, and ever-changing dietary preferences (plant-based diets, organic, flexitarian). All of this has a direct impact on those who produce, distribute, and serve meals every day.

This whitepaper brings together up-to-date data, major trends, and economic scenarios to help Food & Beverage players **understand how the restaurant market is evolving in France**, the direction consumption is heading, and the opportunities for the coming years.

The information presented is taken from the report of the ICE – Agency for Foreign Promotion, Paris Office (January 2025) as well as the macroeconomic projections of the Banque de France (December 2024).





ECONOMIC CONTEXT

Economic context of France

In 2023, the French economy slowed down.

Following the post-Covid rebound, GDP growth was limited to +0.9%, hampered by persistently **high inflation and a decline in consumption**. The hardest hit? Food products.

-3,6%

This is the drop in food consumption in volume in 2023, after another decline of -3.2% in 2022.

+11%

At the same time, food prices increased by 11.3%.

This mix of **high prices** and **stable purchasing power** has pushed many consumers to change their approach: more promotions, less waste, and often some concessions on quality to save money (ICE, 2025).

A positive sign

Despite this, household gross purchasing power recorded a slight increase (+0.8%), driven primarily by higher wages and support measures. However, spending remains cautious.

What to expect from the next two years?

The Bank of France forecasts a slow but gradual recovery:

GDP growth: +1.1% in 2024, +0.9% in 2025 Inflation down: from 2.4% to 1.6%

Household consumption will start to rise again, driven by a more stable economic climate and renewed confidence.



EVOLUTION OF HOSPITALITY DEMAND

2 Evolution of hospitality demand

The **restaurant** industry in **France** is undergoing a profound **transformation**. After the difficult years of the pandemic, the sector has rebounded, but in a profoundly changed context: **more demanding consumers are sensitive to value, the origin of ingredients, and sustainability**.

+5,5%

In 2023, the hospitality sector recorded a growth of +5.5% in value compared to the previous year (ICE, 2025).

A sign of recovery, accompanied however by profound changes in out-of-home consumption habits.

A more demanding and more responsible demand

Customers are looking for **affordable quality, transparency, and flexible formats**. Delivery remains strong, but the desire for in-person experiences is also growing, especially among younger people.

The menus are enriched with **plant-based options, gluten-free or lactose-free options, sustainable and seasonal dishes**.

Attention to environmental impact is increasing: less waste, more local products and responsible packaging.

Food service players must now respond to a **more selective demand**, which is no longer limited to taste but also integrates the ethical, environmental and identity dimensions of food.



ANALYSIS OF FOODSERVICE SEGMENTS

3 Analysis of foodservice segments

The restaurant sector in France is divided into several **segments**, each with its own dynamics and **specific trajectories**. Here's an overview of the key trends redefining the market.

Traditional restoration

Conventional restaurants remain the mainstay of French foodservice, but they have suffered greatly from the consequences of the pandemic. In **2023**, they saw **growth of +5.5% in value compared to 2022**, without, however, returning to pre-crisis levels (ICE, 2025).

Consumers returning to restaurants are more attentive: they favor establishments with a **clear identity, traceable ingredients, and simple but carefully prepared dishes**. The balance between perceived quality and affordability has become essential for customer loyalty.



Restauration collective

The collective catering sector, including school, company and hospital canteens, is entering a **recovery phase, but at a moderate pace**. The market remains largely dominated by large operators, even if we are seeing a **gradual return to direct management** by public administrations and companies.

The main expectations concern the use of **local, organic, origin-controlled and environmentally certified products**. However, many structures struggle to comply with the requirements of French regulations, particularly due to insufficient supply and logistical constraints (ICE, 2025).

3 Analysis of foodservice segments

Fast food and fast good

This is the most dynamic segment of French food service. **Fast food continues its steady growth, while also transforming.** Today's consumer is looking for healthier, more traceable, and **sustainable alternatives**, without sacrificing speed or **convenience**.

In 2023, fast food revenues in France increased by 8% compared to the previous year. This segment now represents **more than a quarter of national restaurant spending (ICE, 2025)**.

Hybrid formats—often called "fast good"—are emerging, combining speed of service with fresh, seasonal ingredients, often inspired by international cuisines. We're also seeing the rise of concepts like **gourmet street food, dark kitchens, and urban bistros with flexible, digital menus**.



In short, French foodservice is adapting to a **new generation of consumers seeking more conscious, faster experiences that align with their values.**

Each segment evolves according to its own logic, but all share the imperative to innovate to remain relevant.

A close-up, artistic photograph of a hand holding a white piping bag, dispensing pink frosting onto a light-colored cake. The frosting is piped in a series of decorative swirls. The entire image is overlaid with a semi-transparent pink filter. The word "CONCLUSIONS" is written in large, white, bold, sans-serif capital letters across the lower portion of the image. A thin white vertical line is positioned to the left of the text.

CONCLUSIONS

4 Conclusions

The French restaurant industry is undergoing a phase of repositioning: a slow recovery in consumption, more demanding customers, and a hospitality sector evolving toward more agile, sustainable, and quality-conscious formats. For players in the food and beverage sector, interesting opportunities are opening up, provided they are prepared, have a clear vision, and a strong focus on the local market.

5 tips for entering (or strengthening) the French food service industry

1. Study new consumption habits

Post-pandemic French consumers are more informed, health-conscious, and attentive to the origin of their products. It's essential to understand trends such as flexitarianism, the growing interest in plant-based products, the search for lighter options, and the increasingly decisive role of Nutri-Score in purchasing decisions.

2. Position the offer on quality and traceability

Successful products are those that effectively communicate their origin, their supply chain, and their values. "Local" products are valued, but foreign products can also find their place if they demonstrate authenticity, certifications, and transparency.

3. Adapt formats and packaging to new service logic

Out-of-home consumption has become fragmented: delivery, on-the-go consumption, smaller portions, and ready-to-eat solutions are increasingly in demand, even in traditional restaurants. It's useful to offer flexible products that are easy to handle and store.

4 Conclusions

4. Collaborate with local operators and hospitality distributors

Having a good product isn't enough. You need to integrate the right channels, be present in hospitality channels, and participate in calls for tender or collective contracts. Working with local partners facilitates adaptation to the regulatory, logistical, and cultural context.

5. Be present at key industry events

Trade shows remain an essential sales tool for gaining exposure, building contacts, and understanding market dynamics. Actively participating in international events allows you to showcase new products, network with competitors, and attract qualified buyers.

The role of international events: SIGEP as a commercial lever

Among the most relevant platforms for engaging with the world of catering and food crafts, **SIGEP World stands out as a benchmark.**

With its focus on gelato, pastry, bakery, coffee and food service, it offers a concrete opportunity to:

- discover trends and product innovations
- meet hospitality operators and buyers from around the world
- promote its offer in a high-visibility event

For French professionals, SIGEP also offers free participation with invitations, thanks to programs dedicated to international buyers. This is a real opportunity to expand your network, find new partners, and strengthen your market position.



Follow SIGEP Vision

SIGEP Vision represents a vital opportunity to explore the trends shaping the future of foodservice. Both a concept and a physical space, SIGEP Vision unfolds through a rich program of initiatives, offering attendees a unique perspective on the future of the industry as a whole.

Through collaboration with research institutes, SIGEP Vision acts as a true global observatory of the out-of-home market, disseminating trends and updated data throughout the year. SIGEP thus asserts itself as a unique crossroads of know-how, technologies, and innovation.

What happens here gives birth to the winning concepts of tomorrow. Follow SIGEP Vision and stay ahead of the industry.

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