

## FRANCE FOODSERVICE SOFTENS AS GLOBAL MARKET STABILIZES, SIGNALING NEW SOURCING DYNAMICS

***According to Deloitte, France foodservice market navigated shifting trends in 2025, after five years of outperforming global growth, as TUTTOFOOD reinforces its role as a European hub connecting global buyers and supply chains***

**Milan, xx April 2026** – The global foodservice market is entering a phase of steady, moderate growth, approaching a value of €2.98 trillion in 2025, as the sector transitions beyond post-pandemic recovery into a more stable and structurally evolving environment.

According to an exclusive preview of Deloitte's *Foodservice Market Monitor 2026*, shared with TUTTOFOOD ahead of its release, global growth reached +2.2% in 2025 compared to 2024, with performance driven primarily by Europe (+6.0%) and Asia-Pacific (+3.2%).

*"Foodservice is entering a new phase shaped by evolving consumption models and supply chain complexity,"* said Antonio Cellie, CEO of Fiere di Parma. *"In this context, TUTTOFOOD, Southern Europe's leading food business platform, helps turn market insights into concrete business opportunities by connecting international suppliers with over 4,000 top buyers, supported by a Buyers Program organized in cooperation with ITA – Italian Trade Agency".*

*"In recent years, foodservice growth has been shaped by two main dynamics: the expansion of formats, with QSR playing a pivotal role, and the increasing penetration of chain operators, which are proving particularly effective in combining service, quality and customer experience,"* said Tommaso Nastasi, Deloitte partner and Value creation service leader. *"As a result, the channel is becoming progressively more attractive for the entire value chain. Partnerships with structured chains are enabling suppliers not only to streamline commercial efforts and optimize cost-to-serve, but also to engage in co-development initiatives, delivering more tailored offerings and ultimately generating greater value across the ecosystem".*

This shift marks a transition toward a "new normal", where operational efficiency, format innovation and supply chain integration are becoming the key competitive drivers across the industry.

France's foodservice sector, valued at €65 billion in 2025, lost momentum in 2025 recording a slight decline of 0.1% compared to 2024, after a five-year period of average annual growth of 6.6%. The annual performance was driven by the decline of more traditional models (Full Service Restaurants and Cafés and Bars), partially offset by the expansion of Quick Service Restaurants (QSR) models (+1.7%) and Street Food (+7%).

The QSR and Street Food categories, which led the French sector in 2025, are expected to be one of the fastest-expanding segments in the coming years, with North America and Asia-Pacific driving global growth fueled by these two models. They will also support the French foodservice market, maintaining steady growth and reflecting continued opportunities for strategic investment in the food sector.

### **Key global foodservice trends**

Globally, consumer preferences are evolving rapidly: premium packaging is emerging as a key driver of delivery growth, with 90% of consumers willing to order a wider variety of dishes when premium packaging is available, and 53% willing to pay a premium. At the same time, value for money is becoming increasingly central while approximately 80% of consumers are increasingly demanding digitalization across the customer journey, although these are not yet fully optimized across markets.

On the supply side, the growth of off-premises consumption is driving the redesign of formats, with 41% of operators planning more dedicated spaces for delivery and takeaway and 34% of QSR focusing on takeaway-only locations. Automation is spreading rapidly, with 74% of operators introducing technologies to improve productivity. While only 28% currently report benefits in profitability, this trend presents clear opportunities for further efficiency improvements and innovation.

### **About TUTTOFOOD**

TUTTOFOOD is Southern Europe's leading food business platform, bringing together global food innovation, sourcing, and market growth. Based in Milan, it serves as a dynamic hub for building solid strategic trade alliances among producers, distributors, and global markets. Organized by Fiere di Parma, a leading operator in the Italian and European exhibition industry, TUTTOFOOD stands as both a national and international benchmark for industry growth and the ongoing evolution of the food sector.