



FRANCE RETAIL ASSESSMENT 2026

Country Report

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ABOUT ATNi

ATNi (Access to Nutrition initiative) is a global foundation headquartered in the Netherlands that actively challenges the food industry, investors, and policymakers to shape healthier food systems. Its mission is to transform markets so that, by 2030, at least half of companies' food and beverage sales are derived from healthy products. ATNi analyzes and translates data into actionable insights, driving financing, partnerships and innovations for market transformation so that all people have access to nutritious and sustainable food. ATNi is overseen by an independent board and advised by an international academic expert group that works pro bono. The organization is funded, among others, by the Gates Foundation and the UK Foreign, Commonwealth and Development Office. More information about ATNi's governance and operating policies is [available online](#).

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ACRONYMS

| | |
|--------|--|
| AOP | Appellation d'Origine Protégée |
| ATNi | Access to Nutrition initiative |
| CAGR | Compound Annual Growth Rate |
| CSRD | Corporate Sustainability Reporting Directive |
| EESC | Conseil Économique, Social et Environnemental |
| ESG | Environmental, Social, and Governance |
| EMI | Euromonitor International |
| F&B | Food & Beverage |
| FOP | Front-of-pack |
| GALEC | Groupeement d'Achats des Centres Leclerc |
| HFSS | High in fat, sugar or salt |
| HHI | Herfindahl-Hirschman Index |
| HSR | Health Star Rating |
| KPI | Key Performance Indicator |
| NNS | Non-nutritive sweeteners |
| NPM | Nutrient Profile Model |
| PNA | National Food Programme [Programme Nationale de L'Alimentation] |
| PNAN | National Food and Nutrition Programme [Programme National de L'Alimentation et de la Nutrition] |
| SNANC | National Strategy for Food, Nutrition and Climate [Stratégie Nationale pour l'Alimentation, la Nutrition et le Climat] |
| SSB | Sugar-sweetened beverage |
| UNICEF | United Nations Children's Fund |
| UPF | Ultra-processed food |
| US | United States |

GLOSSARY

Key terms are outlined below; the complete glossary is available in the full [methodology](#).

Convenience store: Grocery retail outlets selling a wide range of groceries and typically characterized by extended opening hours, a selling area under 400 square meters, and a range of foodservice products such as take-away or made-to-order hot foods [Euromonitor International, Passport].

Hypermarket: Similar to supermarkets but larger, with over 2,500m² of selling space. Hypermarkets also sell a range of non-grocery merchandise. Hypermarkets are frequently located on out-of-town sites or as the anchor store in a shopping centre. In the United States, these are often referred to as 'supercenters.' Excludes cash and carry, warehouse clubs and mass merchandisers [Euromonitor International, Passport].

Modern grocery retail: Aggregation of modern grocery channels such as supermarkets, hypermarkets, convenience stores, discounters, warehouse clubs, and food/drink/tobacco specialists, including independent outlets [Euromonitor International, Passport]. It is distinguished from traditional grocery retail, which includes small, independent shops, market stalls, and informal vendors. In this report, modern grocery retail is defined as total grocery sales minus those via small local retailers.

Operating brand: The retail brand name under which a retailer operates its physical or online stores. A single parent company may own and manage multiple operating brands. For example, Food Lion is an operating brand of Ahold Delhaize USA, and Intermarché is an operating brand of Les Mousquetaires. Sometimes referred to as 'grocery brands,' 'trading brands,' or 'retail banners.'

Private-label: A product or brand made by a third-party but sold exclusively under a retailer's own proprietary brand label, with the retailer controlling all aspects. Sometimes referred to as 'own-brand.'

Retail food environment: A subtype of the food environment relating to the physical and economic settings where people purchase food and beverages, such as supermarkets, convenience stores, restaurants, and vending machines. It includes the availability, affordability, quality, and marketing of food products within these outlets, which can influence consumer choices and population health.

Supermarket: Retail outlets selling groceries such as non-perishable products (e.g. rice, pasta and sauces), fruit and vegetables, beverages and household products. They usually have a selling space of between 400 and 2,500m². Excludes discounters, convenience stores and small independent grocery stores [Euromonitor International, Passport].

Ultra-processed food (UPF): The term is used with some variation across reports and studies, but it is most commonly defined according to the NOVA classification. UPFs are foods made mostly from industrial ingredients and additives, with minimal or no unprocessed food content. These additives—introduced during manufacturing to enhance taste, texture, and shelf life—result in products such as sweet and savoury snacks, instant noodles, confectionery, meat substitutes, and soft drinks.

SUMMARY

PURPOSE AND SCOPE

ATNi's France Retail Assessment 2026 evaluates how leading French food retailers influence access to nutritious and affordable foods through their policies, commitments, and actual performance. It examines what retailers state they aim to achieve through their nutrition strategies, targets, and governance, and compares this with independent assessments of how they act in practice—based on an analysis of their private-label product portfolios, promotional activities, and the pricing of retail 'food baskets.'

The findings provide a picture of how retailers shape food environments and highlight opportunities to enhance their role in promoting healthier and more affordable diets. For France, the analysis focuses on three of the largest grocery retailers, covering an estimated 46% of the formal modern grocery retail sector: E.Leclerc (16–18%), Carrefour (15–17%), and Le Groupement Mousquetaires (Intermarché) (12–14%).

RESEARCH METHODOLOGY

The assessment follows a standardized methodology developed by ATNi and consistently applied in the same way across six countries representing different income settings. It integrates multiple data sources—including corporate disclosures, publicly available information, and curated third-party datasets—to construct a robust and comparable evidence base.

The Retailer Profile qualitatively assesses the extent to which the three largest retailers—E.Leclerc, Carrefour, and Intermarché—address nutrition within their business practices, commercial strategies, and company policies. It evaluates whether they go beyond regulatory compliance to support healthier diets. The assessment draws primarily on publicly available information; only Carrefour took the opportunity to review the findings and provide additional evidence.

The Product Profile assesses the nutritional quality of private-label packaged foods and beverages using internationally recognized nutrient profile

models (NPMs). In addition, promotional practices and affordability are analyzed through established international analytical frameworks aligned with global nutrition guidance, such as the 2019 EAT-Lancet Reference Diet.

By combining these elements, the integrated approach enables both context-specific insights for France and cross-country comparisons, providing a solid foundation for informing retailers, investors, and policymakers in their efforts to foster healthier food retail environments.

KEY FINDINGS

GROCERY RETAIL LANDSCAPE

France's grocery retail market is well-established, characterized by a high degree of consolidation among leading retailers. The three retailers included in this assessment together account for nearly half of total formal grocery sales, underscoring their significant influence within the food system. The retail landscape is characterized by widespread supermarkets and hypermarkets, strong competition on price, promotions, and private-label offerings, and strategic expansion through acquisitions and targeted regional growth to achieve broad nationwide coverage. As a result, French retailers reach a broad consumer base, estimated at approximately 49–51 million people.

France benefits from a strong food culture and a relatively robust nutrition policy framework, contributing to overall improvements in diet quality and comparatively low levels of obesity. Consumption of fruits, vegetables, legumes, and whole grains has increased in recent years, reflecting well-established healthy eating practices.

However, these positive trends coexist with a continued rise in the consumption of ultra-processed foods (UPFs), driven in part by growth in packaged food and beverage (F&B) sales. This dual dynamic highlights the central role of major retailers in shaping

food environments and consumer choices, and the importance of aligning retail practices with public health objectives.

RETAILER ASSESSMENT FINDINGS

Retailer profile: Nutrition strategies and corporate commitments

All three selected retailers (E.Leclerc, Carrefour, and Intermarché) incorporate nutrition into their wider Environmental, Social, and Governance (ESG) or sustainability strategies, though the depth and clarity of these commitments vary. Of these, Carrefour shows the most developed approach to nutrition, with robust nutrition governance, some formalized reformulation targets and reporting, and nutrition incentives directly in its loyalty programme.

However, all three retailers have areas for improvement. This includes setting public targets to increase the share of sales derived from 'healthier' products using government-endorsed NPMs such as Nutri-Score, or to increase relative affordability of healthier products. Retailers can also improve transparency through more frequent and comprehensive reporting on their ongoing activities.

Retailer profile: Marketing policies and consumer information

Of the three retailers, only Carrefour has documented initiatives aimed at shifting in-store environments towards healthier choices. These include targeted promotions designed to increase purchases of healthier and more sustainable products, as well as the prominent display of healthier alternatives on its e-commerce platform. In addition, in April 2025, Les Mousquetaires (Intermarché's parent company) announced plans to pilot the sale of healthier products at checkouts in selected stores. However, none of the three retailers have a published, codified commitment or policy on responsible marketing to children that includes explicit restrictions on the marketing of unhealthy products.

With regard to labelling, all three retailers demonstrate strong uptake of Nutri-Score, applying it to many, and in some cases all, of their applicable private-label products. Carrefour reports that 100% of its applicable private-label products carry the label both in-store and online, and that it also requires national brand suppliers to use Nutri-Score.

Product profile: Nutritional quality and levels of processing

The overall nutritional quality of the private-label portfolios assessed remains modest.^{a,b} Of the 8,331 private-label products assessed across the three French retailers, only 25% of scored A or B on the Nutri-Score model, indicating that relatively few products fall within the healthiest Nutri-Score grades.

Using the Health Star Rating (HSR) model, French retailers performed comparably to other retailers included in ATNi's multi-country Retail Assessment. Overall, 44% of assessed private-label products met the 'healthier' HSR threshold of 3.5 or above, which is slightly above the overall average of 41% across all retailers in the assessment. Among the three French retailers, E.Leclerc had the highest proportion of 'healthier' private-label products (46%), followed by Carrefour (45%) and Intermarché (41%).

In addition, when applying the combined approach assessing products high in fat, sugar, and salt (HFSS) and/or containing markers of ultra-processing (colours, flavours, or non-nutritive sweeteners (NNS)), the majority of private-label products sold by French retailers were classified as unhealthy. Across the three retailers, 84% of private-label products fell into this category, closely aligning with the overall assessment result of 86% across all countries.

^a Baby food, alcohol, and health supplement categories were excluded from private-label products due to incompatibility with the selected NPMs. Fresh produce and foods prepared in-store were also excluded.

^b Private-label products are those that retailers produce and package themselves, giving them full control over recipes, packaging, marketing, and pricing.

Promotions

Analysis of promotional practices across the three selected retailers indicates that each allocates less than one-quarter of flyer space to the promotion of healthy products. Carrefour featured the highest share of healthy items (21%), followed by E.Leclerc (19%) and Intermarché (17%). In contrast, promotions for unhealthy products accounted for a substantially larger share of flyer space, reaching 47% at Carrefour, 35% at E.Leclerc, and 44% at Intermarché.

Across all three retailers, the most frequently promoted unhealthy products were sweets and ice cream, followed by refined grains, baked goods, and snacks. Deep fried foods, unhealthy ready meals, and high-fat dairy products also featured prominently, particularly in Intermarché flyers. Overall, these findings highlight an imbalance in promotional prominence, with unhealthy products consistently receiving greater visibility than healthier options in retailers' weekly flyers.

Affordability of healthier and unhealthy food baskets

ATNi's pricing analysis shows that healthier food baskets at French retailers—E.Leclerc and Carrefour—were the most affordable among the retailers in the six countries assessed. E.Leclerc offered the lowest-cost healthier basket, reflecting its strong focus on price competitiveness, while Carrefour's pricing aligns with its more premium market positioning.

However, at both retailers, healthier food baskets were less affordable than their less healthy counterparts. When expressed as a proportion of daily per capita net income, the purchase of healthier baskets accounted for 9.0% at E.Leclerc and 11.1% at Carrefour, compared with 7.3% and 8.9%, respectively, for less healthy food baskets.

CONCLUSIONS

ATNi's France Retail Assessment 2026 shows that while leading grocery retailers—E.Leclerc, Carrefour, and Intermarché—have integrated nutrition into their strategies to some extent, significant opportunities remain to strengthen their impact. Key priorities include setting measurable nutrition targets, improving the healthiness of private-label portfolios (as well as overall offerings), implementing responsible marketing policies, and rebalancing promotions and pricing to favour healthier choices. Given their scale and influence, French retailers are well positioned to play a more decisive role in improving food environments and supporting healthier diets.



INTRODUCTION

RETAILERS AND THE FOOD ENVIRONMENT

The modern grocery retail sector plays a central role in shaping food environments in France, influencing which foods are available, affordable, and promoted to consumers. With the majority of food purchases taking place through modern retail formats, including supermarkets, hypermarkets, and discount stores, retailers exert significant influence over dietary patterns and population health. To better understand this influence, ATNi developed the Retail Assessment 2025-2026, which evaluates leading food retailers' commitments, policies, and practices related to nutrition and health, providing evidence to strengthen accountability and inform progress towards healthier food environments.

The grocery retail environment, where food is purchased for immediate or later consumption, forms a key component of the physical food environment. Retailers shape consumer choices through decisions on product assortment, pricing, placement, and

promotion, thereby affecting the visibility, affordability, and desirability of healthier versus less healthy foods. These commercial strategies can either reinforce or counteract national public health objectives.

In France, diet-related non-communicable diseases, including overweight and obesity, remain a public health concern despite a relatively strong nutrition policy environment. This includes fiscal measures such as the sugar-sweetened beverage tax, alongside voluntary front-of-pack (FOP) nutrition labelling through Nutri-Score. However, consumption of ultra-processed foods (UPFs) continues to rise, highlighting the limits of existing policy measures alone. In this context, retailers' actions—and inaction—play a critical role in shaping food environments. Understanding how leading retailers translate policy objectives into practice is essential for improving access to healthier, more affordable foods across the French food system.

METHODOLOGY



ATNi's Retail Assessment 2025-2026 comprises tailored research components applied consistently across 18 retailers in six countries: the United States (US), France, Indonesia, South Africa, the Philippines, and Kenya. As outlined in the full [methodology](#), the assessment provides a transparent, evidence-based approach to evaluating how the modern grocery retail sector shapes food environments and nutrition outcomes.

The methodology was developed in consultation with experts in nutrition, public health, food policy, and retail, and reviewed by an independent advisory group to ensure scientific rigor and policy relevance.

Together, the research components offer an integrated view of how modern grocery retailers influence food environments through their policies, practices, and pricing strategies. The analysis includes corporate nutrition-related policies and disclosures, as well as independent assessments of retailers' promotional activities, private-label product portfolios, and the relative affordability of healthier versus less healthy retail food baskets. These are complemented by a review of national policy and regulatory frameworks to identify gaps and opportunities for stronger alignment between retail action and public health objectives.

Research was conducted between November 2024 and November 2025. This report presents the findings for France, applying the methodology to three leading retailers: E.Leclerc (parent company: le Mouvement E. Leclerc), Carrefour (parent company: Carrefour Group), Intermarché (parent company: Le Groupement Mousquetaires). The analysis offers valuable insights into how major retailers shape food environments, though it is limited to three national retailers and focuses primarily on private-label packaged products, excluding regional variation and the broader product offering. By using a consistent set of indicators and analytical procedures across all six countries, the assessment generates detailed country-level insights and enables meaningful cross-country comparison within a broader global perspective on food retail and nutrition.

MAPPING THE RETAIL LANDSCAPE



Mapping France's grocery retail environment provides essential context for interpreting the broader findings of ATNi's Retail Assessment 2025-2026. This section offers a descriptive overview of the size, structure, and dynamics of the modern grocery retail sector, outlining key players, ownership patterns, and the consumer and policy factors shaping food retail within the broader French food system.

NUTRITION CONTEXT: MALNUTRITION AND DIETARY PATTERNS

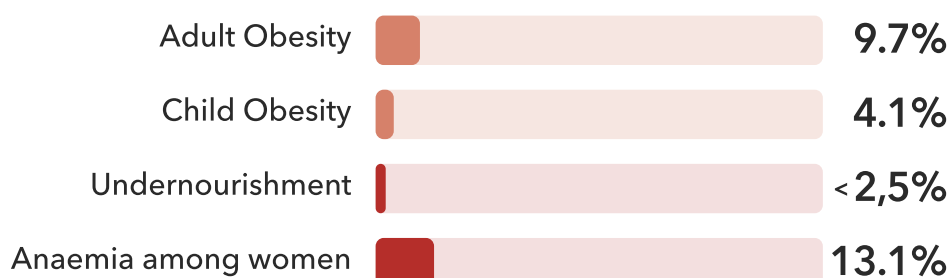
France has made progress in addressing its burden of malnutrition, but challenges remain in specific areas. Obesity prevalence has declined in recent years and remains below regional averages. Among adults, obesity decreased from 11.7% in 2012 to 9.7% in 2022, compared with a Western European average of 15.8%.¹ Among children and adolescents (5–19 years), obesity has also declined from 5.0% in 2012 to 4.1% in 2022, which is half the European average (8%).²

The prevalence of undernourishment remains very low (<2.5%), consistent with other high income Western European countries where food availability and

affordability are high. However, micronutrient deficiencies persist, linked to low consumption of fiber-rich foods such as fruits and vegetables, legumes, and whole grains, affecting nutrients including potassium, magnesium, vitamin C, folate (vitamin B9), vitamin E, as well as iron and vitamin D.³

The relative healthiness of diets in France, compared with other high income countries, can be attributed to its strong food heritage and culinary traditions, the relative affordability and accessibility of fruits and vegetables, and government efforts to promote healthier diets—most notably the 'Programme National

FIGURE 1
PREVALENCE OF DIFFERENT FORMS OF MALNUTRITION IN FRANCE



Source: FAO and WHO^{1,4,5}

NutriNet-Santé'.^{6,7} Habits taught from a young age—such as eating home-cooked meals, choosing whole foods, prioritizing family meals, and limiting snacking between meals—all contribute to higher consumption of unprocessed or minimally processed foods, including fruits, vegetables, legumes, and whole grains, compared to highly processed foods.^{6,7}

These patterns are reflected in recent dietary trends. The NutriNet-Santé study (2014–2022) reported increased intake of legumes (+22%), nuts (+59%) and whole-grain products (+7%), alongside declining consumption of less healthy foods such as red meat (-19%), refined cereals (-18%), and sweetened drinks (-15%). However, intake of prepared and mixed dishes (+16%) and processed meat (+35%) increased over the same period. Overall, these changes correspond to an improvement in diet quality, as measured by the Comprehensive Diet Quality Index score.⁸

However, despite overall improvements in diet quality, consumption of UPFs is increasing. According to the NutriNet-Santé study, a survey of 74,470 respondents, UPFs, as defined by the NOVA classification, made up 35.9% of total energy intake in 2014.⁶ While this is substantially lower than in the US, Canada, and the UK,

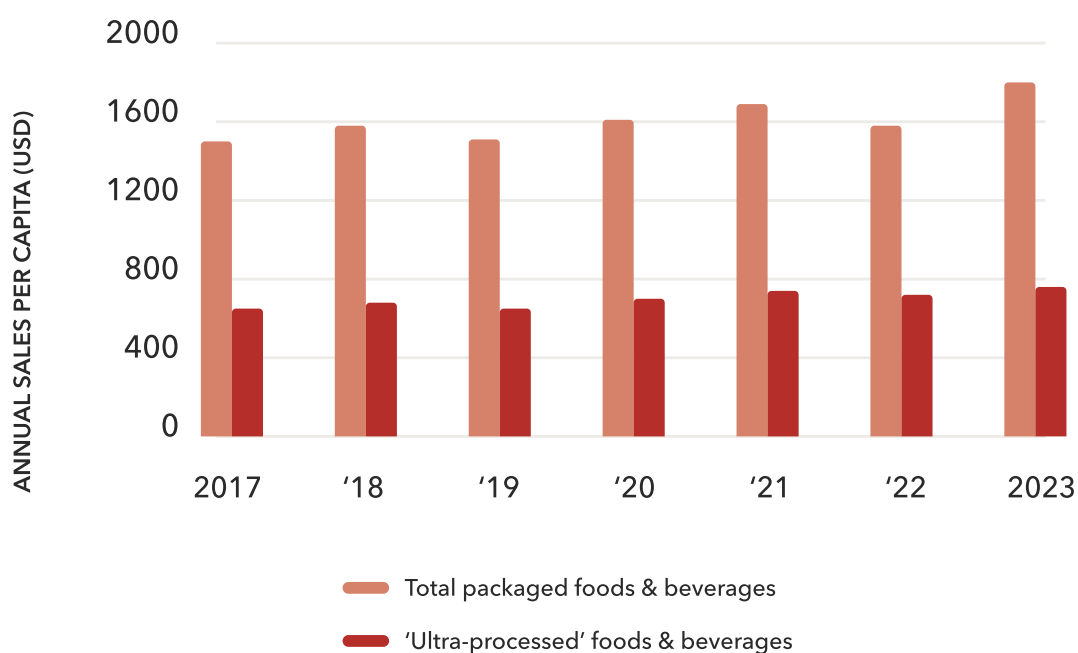
where they account for more than 50%, market data from Euromonitor International (EMI) shows continued growth in terms of sales of ultra-processed food and beverages, increasing from USD 1502.96 per capita in 2017 to USD 1792.77 in 2023 (Figure 2).⁶

Between 2017 and 2024, packaged F&B sales grew at a compound annual rate (CAGR) of 3.82% to USD 125.68 billion, or USD 1,887 per capita. Meanwhile, UPF-dominated categories show 2.65% annual growth, in 2023 representing USD 753.3 per capita.^{9,c}

Dietary patterns differ across population groups. NutriNet-Santé data show that men consume more animal products, energy-dense foods, and unhealthy items, while women consume higher levels of plant-based and healthier foods. Education and income are also linked to diet quality. Individuals with higher education levels report lower red meat and higher

^c UPF is defined as “foods made of mostly industrial ingredients and additives with minimal amounts of unprocessed foods. These additives are not naturally occurring in the food, but are added in the processing phase to increase palatability and shelf-life. Examples of UPFs include sweet and savoury snacks, instant noodles, confectionery, meat substitutes, and soft drinks, among others.”⁸

FIGURE 2
PACKAGED F&B SALES AND UPF CATEGORY GROWTH IN FRANCE
IN ANNUAL SALES PER CAPITA, 2017-2023.^{10,c}



whole-grain product consumption, whereas those with the lower education have higher consumption of processed meat. Meanwhile, legumes are consumed in greater quantities by low-income individuals and students.⁸

NUTRITION POLICY LANDSCAPE

France has a broad nutrition policy framework, guided by the National Food and Nutrition Programme (PNAN), the National Nutrition and Health Programme (PNNS), and the National Food Programme (PNA). The country has taken several positive steps, including introducing taxes on sugar-sweetened beverages (SSBs), adopting voluntary FOP labelling through Nutri-Score, and using public health messaging to promote healthier diets. However, gaps remain, particularly with regard to restrictions on the marketing of unhealthy foods and beverages and the absence of mandatory FOP labelling.

In addition, several nutrition-related policy measures rely on voluntary commitments, which can limit both their reach and enforceability. Progress has also been constrained by delays in the French National Strategy for Food, Nutrition and Climate (SNANC), the status of which remains unclear at the time of this assessment.

BOX 1 POLICY: FRANCE'S NATIONAL FOOD STRATEGY

France's food and nutrition policy is guided by the PNAN, which sets the 5-year direction and serves as an umbrella framework for the PNNS and the PNA. The PNNS includes nutrition commitments that individual companies can sign up for, while the PNA promotes collective voluntary action, such as the French soft drinks sector committing to a 12% reduction in sugar levels within 10 years.^{11,12}

Additionally, France has a draft SNANC for 2030, which is expected to set objectives for stakeholders, including the retail sector, to contribute to improved practices on food, nutrition and climate. However, the publication of the final draft has been delayed.¹³

MODERN GROCERY RETAIL LANDSCAPE

France has a mature grocery retail market, with EMI estimating the total value of grocery sales through formal channels in France (excluding e-commerce) at USD 264.7bn in 2024.¹⁴

- Of this, 92.5% occurs through 'modern' grocery formats, with 'small local grocers' (i.e. formally registered independent retail outlets under 400m² in size), including farmers market stalls, accounting for the remaining 7.5%.
- Since 2020, total grocery sales have seen modest growth at 0.9% annually.
- Growth is expected to continue, with EMI predicting a CAGR of 1.5% between 2024 and 2029.

French retailers reach a broad consumer base, estimated at approximately 49–51 million people (i.e., 93–96% of the adult population).^d This reach underscores the significant influence of modern grocery retailers on consumer food choices and dietary patterns across the country.

^d Estimates are based on the proportion of adults visiting modern grocery retailers, adjusted by store type (0.75 for convenience stores, 1.0 for supermarkets, 1.5 for hypermarkets) and de-duplicated for overlap across retailers. For France (and the US), consumer reach was assumed to be 93–96% of the adult population. A ±10% confidence range was applied to reflect uncertainty.

BOX 2

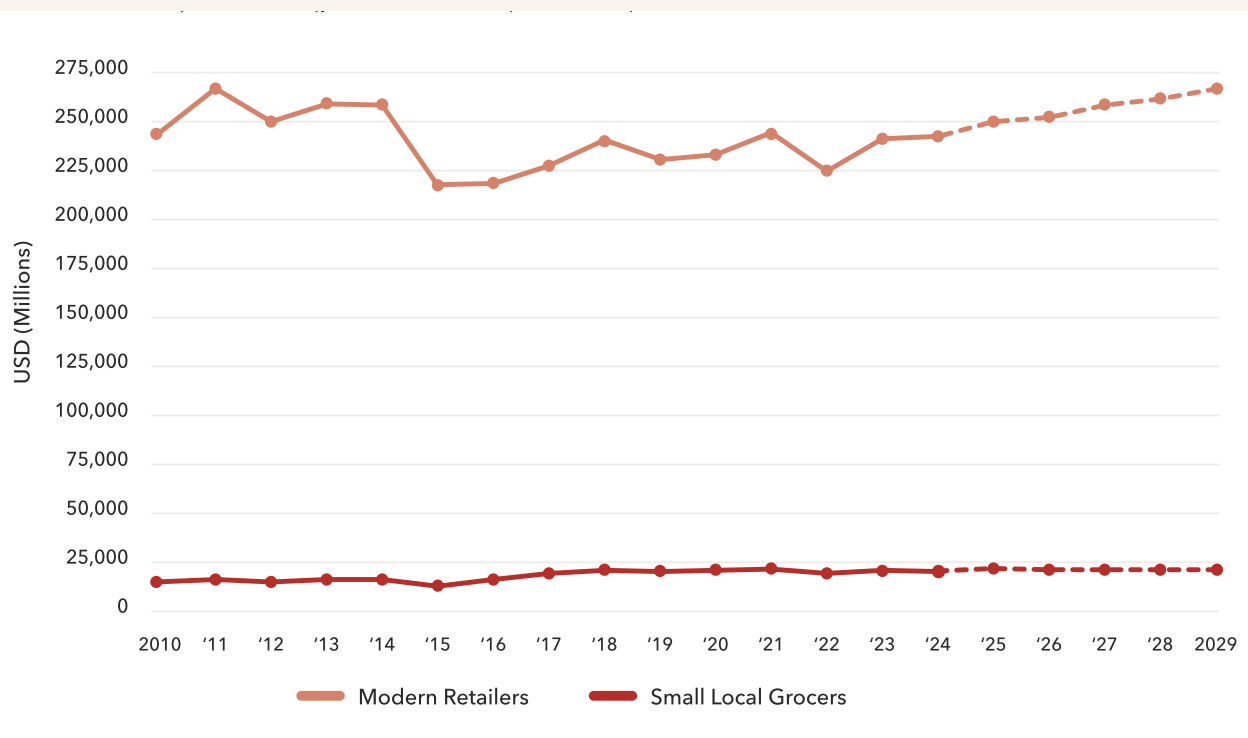
ORIGINS AND DEVELOPMENT OF MODERN GROCERY RETAIL IN FRANCE

Modern grocery retail in France began in the mid-twentieth century, with the emergence of supermarkets in the 1950s and 1960s. Early market entrants included Goulet-Turpin (1958), Carrefour (1959), Auchan and Promodès (1961) and Intermarché (1970).¹⁵ A significant change came in 1963 with Carrefour's launch of the first hypermarché—combining supermarket and department store features—enabling economies of scale and stronger purchasing power with suppliers.

The sector's development has also been shaped by regulatory frameworks. In 1963, France banned below-cost resale, a measure later reinforced by the 1986 government order on freedom of prices and competition, and the 1997 'Loi Galland' Act, which defined purchase price more precisely to protect suppliers. As a result, French retailers have been prohibited from selling below unit purchase price.¹⁶

FIGURE 3

HISTORICAL AND PROJECTED SALES GROWTH OF FRANCE'S RETAIL SECTOR, BY RETAIL FORMAT



Source: EMI data, 2024

Retail formats

France’s grocery retail landscape is dominated by hypermarkets, which account for 40.6% of the modern grocery market in 2024, followed by supermarkets at 29.9%. Food, drink, and tobacco specialists represent 15.2% of sales, reflecting strong consumer demand for specialty products (Figure 4). Discounters hold a 9.3% share, driven by sustained consumer demand for affordability, while convenience retailers account for 4.9%. Within this landscape, the three retailers selected for this assessment—E.Leclerc, Carrefour, and Les Mousquetaires (Intermarché)—together account for an estimated 43–49% of formal modern grocery retail sales, indicating their extensive reach across French consumers.

Small, specialist and artisanal shops, including bakeries, confectioners, organic grocers, butchers, fishmongers, and dairy stores, are also a defining feature of France’s retail environment. Together, they account for approximately 15% of modern grocery retail sales.

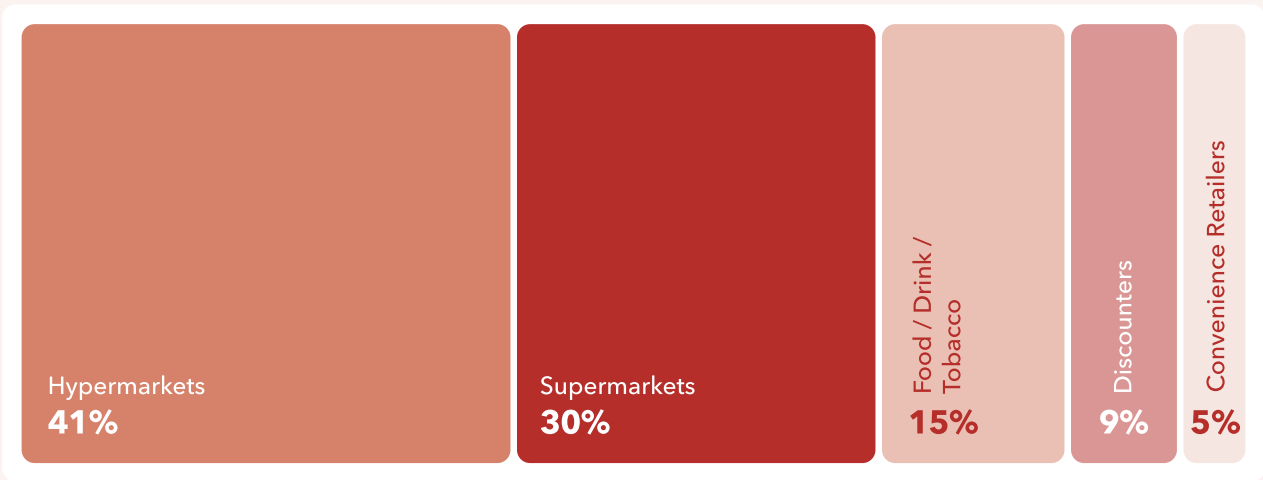
BOX 3 E-COMMERCE

Grocery e-commerce in France has experienced considerable growth in recent years, recording a CAGR of 10.6% between 2017 and 2024, reaching a value of USD 16.7bn—more than double the figure in 2017. The most rapid expansion occurred in 2020 (43.7%), boosted by the COVID-19 pandemic lockdowns. Despite this rapid growth, grocery e-commerce still represents a modest share of the overall grocery retail market, rising from 3.2% in 2017 to 5.9% in 2024. More broadly, French consumers rank among the most active online shoppers in Europe.¹⁷

Geographic distribution

France’s grocery retail outlets, from hypermarkets to convenience stores, have widespread geographic coverage across the country. Hypermarkets are typically located in suburban or peri-urban areas, where land availability allows for large-scale store formats, and near main road networks to enable easy access by car and serve a large geographic area. Supermarkets occupy a middle ground, commonly located in both suburban and small-town settings, while convenience stores are primarily concentrated in busy urban areas.¹⁸

FIGURE 4
SHARE OF MODERN GROCERY MARKET BY RETAIL CHANNEL



Source: EMI data, 2024

RETAIL POSITIONING AND CONSUMER BEHAVIOUR

Socio-economic dimensions

French supermarkets cater to a wide range of socio-economic groups, with distinct brand identities and pricing strategies shaping consumer perceptions:

- E.Leclerc is regarded as the most affordable mainstream retailer, known for competitive pricing and extensive private-label offerings that appeal to price-sensitive households. A recent study found that E.Leclerc's prices were, on average, 7% lower than its competitors.¹⁹
- Intermarché, with its vertically integrated supply chains, similarly positions itself competitively on price, while emphasizing locally sourced products.
- Carrefour meanwhile tends to be perceived as offering more premium products, though it remains competitive through its own-brand and discount formats.
- Hard discounters such as Lidl and Aldi are strongly associated with low-cost shopping, limited product ranges, and efficient operations that attract budget-conscious consumers.²⁰

A recent study conducted in Montpellier found that both higher-income and lower-income households primarily shop at hypermarkets, supermarkets, and

discounters, although higher-income households also more likely to shop at specialized outlets, such as organic stores, and farmers' markets. Meanwhile, those with lower education levels or experiencing unemployment were particularly likely to shop at discounters.²¹ Nonetheless, even among higher-income groups, supermarkets and hypermarkets accounted for the majority of food spending, with relatively few households purchasing more from specialist shops.²¹

Shopping patterns and preferences

While French consumers have historically favoured bulk shopping, as reflected in the large market share held by hypermarkets, shopping habits are shifting towards smaller purchasing baskets and more frequent trips. In 2023, consumers purchased an average of 11.6 items per supermarket visit, down from 12.3 items in 2022. Increasingly, shoppers engage in "store-hopping", visiting an average of 8.5 different retailers to find the best prices, reflecting continued economic and inflationary pressures.²²



MARKET STRUCTURE AND RETAILER CHARACTERISTICS

Market concentration and competition

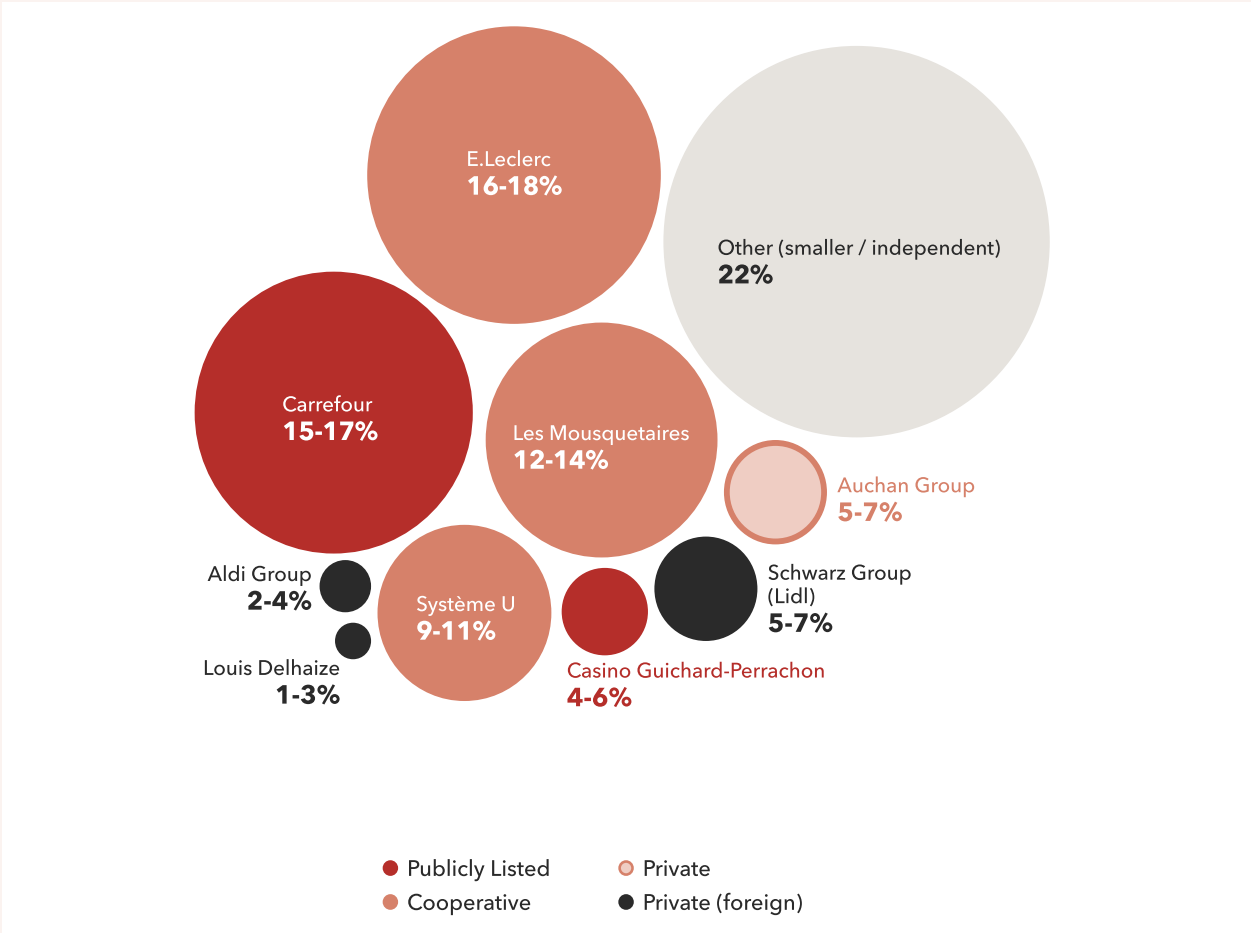
France’s modern grocery retail market is moderately fragmented, with a Herfindahl-Hirschman Index (HHI) score of 932.7 (out of 10,000) in 2024.^e

Three companies—E.Leclerc, Carrefour, and Les Mousquetaires (Intermarché)—together control 46% of the market. The next four largest—Système U, Auchan, Schwarz Group (Lidl), and Casino Guichard-Perrachon—account for an additional 27%. Around 30 companies operate grocery retail chains across France, while independent modern grocery outlets account for 16.6% of sales (Figure 5).

Hypermarket and supermarket channels exhibit different market dynamics. E.Leclerc dominates the hypermarkets channel, capturing nearly 40% of sales, followed by Carrefour, Auchan, and Intermarché. In contrast, within the supermarkets channel, E.Leclerc plays only a minor role. This segment is led by Intermarché with a 27% share, followed by Carrefour (19%) and Super U (11%).

^e HHI is a measure of market concentration calculated by squaring the market share of each firm and summing the results.

FIGURE 5
MAJOR GROCERY RETAILERS IN FRANCE BY MARKET SHARE AND OWNERSHIP TYPE



Source: EMI data, 2024

Since 2015, Carrefour's overall market share has declined by 1.9%, with E.Leclerc and Intermarché increasing by 1.8% and 1.9% respectively, reinforcing the combined market dominance of these three retailers. Carrefour has since expanded its footprint through several strategic acquisitions. In 2024, it acquired Cora and Match from the Louis Delhaize Group for €1.05bn, adding 60 hypermarkets and 115 supermarkets in Le Grand-Est, les Hauts-de-France and Normandie, where its presence has historically been limited. This acquisition is estimated to increase market share by 2.4%, strengthening Carrefour's national influence. In 2025, Carrefour also acquired 31 stores from Intermarché, and 101 convenience stores from Magne, further consolidating its presence in southeastern France.^{23,24}

In 2025, Intermarché and Auchan jointly acquired most of Casino's remaining outlets—with Intermarché taking over 200 units and Auchan 98—and together they formed a 10-year purchasing alliance to increase their negotiating power with major suppliers.²⁵⁻²⁷ Intermarché also announced plans to purchase 81 supermarkets located in the East and Central-East of France from the Belgian Colruyt Group.²⁸ These strategic moves reflect a broader trend of market concentration and regional expansion, as retailers seek to scale operations, increase purchasing leverage, and expand geographic reach in an increasingly competitive and regulated environment. Together these acquisitions have contributed to increased market concentration since 2022.

Other major retailers, including Système U, Lidl, and Aldi have also expanded their market presence. Amid continued economic pressures, budget retailers have gained traction, with Lidl increasing its share by 2.0% since 2015. Lidl now leads the discounter channel with a market share of 65%, followed by Aldi (27%).

The largest retailers maintain a nationwide presence, though regional dominance varies. E.Leclerc holds strong positions in the West and East, while Carrefour dominates the North, Île-de-France, and the Southeast. Carrefour's acquisition of Cora and Match further increased its presence in the North and Paris regions.^{29,30} Meanwhile, Les Mousquetaires (Intermarché and Netto) has expanded its footprint in the Central-East, largely through the acquisition of Casino stores. Overall, regional patterns reflect a combination of historical structures and recent

consolidation, with acquisitions playing a central role in reshaping competition and strengthening retailer positioning.²⁹

Retailer ownership characteristics

France's grocery retailing features a variety of ownership models, shaping how stores are controlled, financed, and governed. A number of major retailers—including E.Leclerc, Intermarché, and Système U—operate as independent cooperatives in which individual store owners serve as both members and shareholders within a broader network and hold voting rights in cooperative governance.

In contrast, Carrefour operates as a publicly traded company listed on the French stock exchange. Other examples of publicly listed retailers include Groupe Casino and Monoprix, while Auchan remains one of the few family-owned national grocery retailers in France.

Foreign ownership in France's grocery retail market is limited, reflecting the strength of domestic players and market saturation. Two notable exceptions are the German discount chains Lidl and Aldi, which operate approximately 1,500 and 900 stores across France, respectively.

Governance and management of stores

The governance structures and management practices in France's grocery retail sector differ considerably across ownership models. In the E.Leclerc cooperative model, management is largely decentralized to individual store owners (adhérents), who act as both entrepreneurs and cooperative members. Operating under a franchise-like model, store owners retain authority over local operations, including pricing and assortment, allowing them to tailor offerings to local demand and include regionally sourced products. While pricing remains flexible, the head office requires benchmarking against competitors to maintain price competitiveness.

At the regional level, store owners are organized through 19 purchasing cooperatives (Société en Commandite par Actions (SCA)), such as SCACentre,

Scanormande, and Scarmor, which coordinate logistics, procurement, and support services. Nationally, purchasing conditions are negotiated by the Groupement d'Achats des Centres Leclerc (GALEC), the central buying body that sets national assortment frameworks. Strategic direction and brand management are overseen by the Association des Centres Distributeurs Leclerc (ACDLec), which manages the use of the Leclerc brand, ensures adherence to cooperative principles and coordinates national policies, marketing and promotional campaigns.^{31,32}

By contrast, Carrefour and Auchan operate under more centralized corporate governance models. As a Société Anonyme (public limited company), Carrefour's Board of Directors oversees strategy and risk, including through specialized committees covering audit, remuneration, nominations, sustainable development, and strategy. While both companies historically managed most stores directly, they are increasingly shifting towards franchise-based models. Between 2018 and 2024, 90% of Carrefour's new stores were opened on a franchise basis—either via standard franchise contracts or lease management contracts, where Carrefour retains ownership while an independent manager leases and operates the store. In 2024, 16 hypermarkets and 23 supermarkets were converted to franchise or lease management contracts, bringing the share of franchised stores to 31% of hypermarkets and 67% of supermarkets.³³

The pervasiveness of franchise and cooperative models in France reflects several structural and cultural factors:

- Tradition of cooperative trade: Independent merchants have long collaborated to enhance competitiveness and collective bargaining power.
- Regulatory constraints: Urban planning laws, notably the Loi Royer (1973) and Loi Raffarin (1996), restricted the expansion of large hypermarket chains, encouraging franchising as a flexible growth alternative.
- Local responsiveness: France's regionalized food culture places strong emphasis on local products of known origin, making decentralized store management a key advantage.

- Shared financial responsibility: Cooperative and franchise models distribute investment costs (e.g. for opening new stores and refurbishments) among independent owners, reducing financial pressure on the central organization, while providing store owners with strong performance incentives.

Product offering

A 2020 study assessing almost 25,000 packaged foods sold in French supermarkets (excluding baby food and alcohol) found that two-thirds were ultra-processed, according to the SIGA classification.^{34,f} Categories with a high proportion of UPFs include: salted meats, cooked dishes, flavoured yoghurts/white cheeses, energy and gourmet bars, breakfast cereals, and vegetarian dishes.³⁵

More recently, the 2018 EGalim law introduced additional protections for producers by capping food discounts at 34% and requiring retailers to sell food products at least 10% above their purchase price. As a result, promotions such as 'buy one, get one free' are no longer permitted. The law also mandates that at least 50% of food products offered must be organic or of protected origin.³⁶ From the weekly flyer analysis (Promotions Chapter), no instances of prohibited 'buy one, get one free' promotions were observed; however, all three retailers used alternative multi-buy strategies such as 'buy two, get one free' offers. Discounts on the second product reached up to 68% in Leclerc flyers and up to 60% in those of Carrefour and Intermarché, while Intermarché additionally advertised reimbursements of up to 80% in coupons, including for non-food items. Despite the EGalim requirement for at least 50% of food products to be organic or of protected origin, keyword searches for 'bio' and 'AOP' only identified only about 10% of validated products.

^f The SIGA classification is an extension of the NOVA classification that includes additional subgroups.³⁰

BOX 4

RETAIL BUSINESS MODELS AND PRIVATE LABELS IN FRANCE

Intermarché is notable for having a vertically integrated business model. The company owns many of the farms, factories and even fishing vessels that produce its products.³⁷ Around 40% of its private-label products are produced in its own factories, which also supply to other supermarkets, such as Auchan. This structure offers greater control and lower transaction costs; however, the profitability of some older facilities, particularly those producing its highly processed foods, has declined, leading the company to sell part of its production base. In mid-2025, the company announced plans to sell eight of its 55 French production units.³⁷ Amid high inflation and economic uncertainty, affordability has become a key concern for French consumers. Between 2023 and 2024, total household spending on fast-moving consumer goods decreased by 0.9%, driving a shift toward private-label products.³⁸ According to a 2024 EuroCommerce and McKinsey study, private-label groceries accounted for 38.3% of the total market sales in France—an increase of 3.2% since 2019.³⁹

KEY INSIGHTS FRANCE RETAIL FOOD ENVIRONMENT

France's modern grocery retail sector is well-established and highly influential in shaping dietary patterns, with most food purchases occurring through modern formats. Hypermarkets and supermarkets continue to dominate overall sales due to their extensive geographic coverage. At the same time, discounters are expanding their footprint as consumers remain highly price-sensitive amid ongoing inflationary pressures. Shopping habits are also shifting toward more frequent, smaller 'volume' trips and 'store-hopping,' reinforcing the importance of competitive pricing and promotions in retailer strategies.

The market is moderately fragmented but consolidating, with the top three retailers—E.Leclerc, Carrefour, and Les Mousquetaires (Intermarché)—holding a substantial share, alongside continued growth among major discounters. Recent acquisitions and purchasing alliances signal rising concentration

and stronger bargaining power with suppliers, with implications for both price setting and the composition of food environments.

France's retail sector is shaped by distinct ownership and governance models, including powerful cooperative networks (E.Leclerc and Intermarché) and publicly listed retailers (Carrefour). These models affect how nutrition policies, pricing, and product strategies are implemented across store networks.

Finally, France combines a relatively strong nutrition policy framework and food culture with a growing reliance on packaged foods and UPFs. This creates a clear opportunity and expectation for retailers to align product, promotion, and affordability strategies with public health goals, particularly by improving the healthiness of private-label portfolios and ensuring healthier options remain consistently affordable.

RETAILER PROFILES



The Retailer Profile qualitatively assesses the extent to which the three selected retailers—E.Leclerc, Carrefour, and Les Mousquetaires (Intermarché)—engage with nutrition, embed it within their commercial practices, and take steps beyond regulatory requirements to support healthier consumer diets. This assessment draws primarily on publicly available information. Although each company was invited to review the findings and provide additional evidence, only Carrefour chose to do so.

All three retailers incorporate nutrition into their wider ESG or sustainability strategies, although the depth and clarity of these commitments vary. As shown in Figure 6, Carrefour has the most developed approach to nutrition, with robust nutrition governance, some formalized reformulation targets and reporting, use of

Nutri-Score to define ‘healthier’, and integration of nutrition incentives directly into its loyalty programme. Meanwhile, E.Leclerc and Les Mousquetaires (Intermarché) lag behind across almost all key elements.

FIGURE 6
RETAILER PROFILE FINDINGS PER NUTRITION TOPIC AREA⁹

| | Nutrition prioritization | | | Portfolio improvement | | Pricing & promotions | | Responsible marketing | | Responsible labelling | |
|---------------|--------------------------|----------|------------|-----------------------|----------------------|----------------------|----------------------|-----------------------|-----------------------|-----------------------|---------------|
| | Recognition | Strategy | Governance | Targets & reporting | Defining ‘healthier’ | Affordable nutrition | Promotions & loyalty | Product positioning | Marketing to children | Identifying products | Health claims |
| E.Leclerc | | | | | | | | | | | |
| Carrefour* | | | | | | | | | | | |
| Inter-marche* | | | | | | | | | | | |

Substantially addressed / in place Partially addressed / in place
 No evidence found / Not in place Not assessed due to regulations

*Provided feedback on Retailer Profile findings

⁹ The green colour indicates areas that are substantially addressed or in place; however, this does not imply that performance is optimal, or that no further improvement is possible.

These differences align with variations in ownership structure and business models across the French retail sector. Carrefour is a publicly traded, largely centralized retailer and falls within the scope of the EU's Corporate Sustainability Reporting Directive (CSRD), which requires standardized sustainability reporting, including on relevant social and health-related topics. In contrast, E.Leclerc and Les Mousquetaires (Intermarché) are private and highly decentralized groupings of independent retailers, with more limited central oversight, which may constrain the development, implementation, and public disclosure of group-wide nutrition strategies.

NUTRITION PRIORITIZATION & GOVERNANCE

Recognizing and addressing Nutrition

Of the three retailers, both Carrefour and Les Mousquetaires (Intermarché) acknowledge consumer health and nutrition within their materiality assessments, although for Les Mousquetaires (Intermarché) it was not considered a high priority. No evidence of a company-wide materiality assessment was identified for E.Leclerc.

Similarly, only Carrefour was found to explicitly recognize nutrition-related enterprise risks, including the impact of changing consumer demand, loss of competitiveness, reputational damage, and regulatory pressures. These risks are published as part of its reporting against the EU CSRD (ESRS S4).

Nevertheless, all three companies articulate some form of nutrition strategy as part of their wider ESG or sustainability strategies. Carrefour stands out as having the most fully developed nutrition approach. Its 2024 Act for Food Part II ESG strategy commits to offering the "best balance between taste, price, and nutrition." Although this ambition is partly tracked through consumer perception, the company embeds nutrition more concretely across its wider ESG framework, including targets on sugar and salt reduction, improved labelling, and measures to encourage

healthier choices. Nutrition also features prominently in Carrefour's 2024 CSR and Food Transition Index and in its ESRS S4 reporting, signalling that nutrition is a core element of the Group's food transition and sustainability agenda.

E.Leclerc and Les Mousquetaires (Intermarché) articulate more limited approaches. E.Leclerc does not list nutrition among its official CSR priorities, although it does describe efforts to reformulate its private-label products by reducing nutrients of concern, improving ingredient quality, and expanding Nutri-Score labelling. Les Mousquetaires (Intermarché) includes nutrition within the "Food transition" pillar of its sustainability strategy and aims to make healthy eating accessible, but its interventions are modest and concentrated mainly on private-label reformulation. Much of this pillar focuses on (sustainable) sourcing from its own local farmers and fisheries rather than dedicated nutrition commitments.

Nutrition governance and accountability

Only Carrefour discloses clear governance arrangements for its nutrition strategy. Oversight is shared by the Group Executive Committee, the Board of Directors, and the CSR Committee, with day-to-day responsibility delegated to the Engagement Department. Nutrition is also embedded in executive remuneration—including for the CEO—through the CSR and Food Transition Index, which includes sugar and salt reduction Key Performance Indicators (KPIs). The board and CSR Committee review progress annually, with 2024 discussions explicitly addressing healthy eating and fruit and vegetable consumption.

For Les Mousquetaires (Intermarché), responsibility for the sustainability strategy—of which nutrition is one part—is assigned to the Chairman of the Quality & CSR Department, but it is unclear whether this role is at the executive level. No evidence was found of regular board oversight of nutrition, nor of executive remuneration linked to sustainability or nutrition KPIs. For E.Leclerc, no publicly available information was found regarding governance of its nutrition approach.

PORTFOLIO IMPROVEMENT

Nutrition targets and reporting

None of the three retailers have set public targets to increase the share of sales derived from 'healthier' products (e.g. Nutri-Score A/B or A/B/C). In terms of reporting, Carrefour reported in 2024 the number of private-label products scoring Nutri-Score A or B across eight European markets, including France), but did not report the proportion of sales value or volume these products represent.

Although all three retailers emphasize private-label reformulation ambitions within their nutrition strategies, only Carrefour's is formalized, having set absolute targets to remove 2,600 tonnes of sugar and 250 tonnes of salt from its private-label portfolio across six markets—including France—between 2024 and 2026, and reporting annually on progress. Between 2022 and 2024 the company reported reductions of 1,336 tonnes of sugar and 250 tonnes of salt. However, because the total volumes of sugar and salt in its portfolio are not disclosed, nor are details about specific products or product categories covered, the overall ambition and public health impact cannot be assessed.

In 2021, Les Mousquetaires (Intermarché) committed to "improving" recipes and packaging for more than 50% of its private-label portfolio by 2025, but it does not clearly define what constitutes "improvement" or how this affects nutritional quality. E.Leclerc, meanwhile, states on its website that it reviews and reformulates private-label recipes and "track[s] salt, sugar, [and] saturated fats", but no public targets or reporting were identified.

PRICING & PROMOTION STRATEGIES

Affordability of healthier products

The results of ATNi's independent pricing analysis, which assesses the cost and affordability of healthier versus less healthy food baskets at E.Leclerc and Carrefour, are presented in the Cost and Affordability Chapter.

All three retailers emphasize affordability as part of their value proposition, but none articulate a deliberate strategy to ensure that nutritious products, specifically, are more affordable for consumers, nor do they outline practical mechanisms to ensure the affordability of healthier options.

E.Leclerc places the strongest emphasis on low prices as part of its business model, highlighting direct procurement, avoiding intermediaries, and low margins to keep costs down. The company has its own price comparison website to track its products' prices against its competitors', reinforcing this focus. Because its low-price strategy applies equally to fresh produce and healthier packaged foods, E.Leclerc does help make nutritious options more affordable; however, it does not specifically prioritize or promote healthier products over less healthy ones.

Carrefour explicitly links affordability with nutrition, stating that no consumer should be excluded from improved nutritional quality due to price or physical access. It highlights the competitive pricing of certain private-label lines—such as Carrefour Quality Line and Carrefour Bio—and underscores the role of promotions and 'appropriate pricing strategies' to make healthier choices more accessible. Carrefour also links affordability to physical accessibility through diverse store formats and expanded e-commerce. Nonetheless, it provides limited detail on how these initiatives make nutritious products affordable for lower-income consumers.

Les Mousquetaires (Intermarché) similarly states an ambition to make 'healthy eating' accessible to all and positions its offer as affordable, yet provides no concrete information on how the company ensures the affordability of healthier products.

Price promotions and loyalty rewards

The results of ATNi's independent analysis of the healthiness of the retailers' promotions—specifically, how frequently 'healthier' versus 'less healthy' products are promoted in their flyers and on e-commerce sites—are presented in the Promotions chapter.

Carrefour stands out for having integrated nutrition-related incentives into some of its loyalty programmes. For example, in 2023, loyalty cardholders received discounts of 10-15% on organic products and on items from the Carrefour Classic private-label range with a Nutri-Score A. While the organic discounts continued into 2024-2025, it is unclear whether eligibility based on Nutri-Score A was maintained during this period. Carrefour has also run short-term promotions aimed at boosting purchases of nutritious products, including the 2023 "essential and nutrition" basket—100 Nutri-Score A and B items offered at controlled prices averaging €2 each—and the 2022 "five fruits and vegetables under €1" campaign.

By contrast, while E.Leclerc and Les Mousquetaires (Intermarché) operate broad loyalty schemes, no evidence was found that these programmes are used to encourage healthier purchasing or to offer proportionately more promotions on nutritious products. Separate from its loyalty scheme, E.Leclerc consistently offers discounts on fresh fruits and vegetables below €1 and offers "anti-waste boxes".

RESPONSIBLE MARKETING

Product positioning and in-store Marketing

Carrefour is the only one of the three retailers with documented initiatives aimed at shifting in-store environments towards healthier choices. In 2022, it piloted the 'Le Lundi C'est Veggie' campaign in Lyon as part of the Consumer Goods Forum's 'Collaboration for Healthier Lives' initiative. The campaign included in-store activations and targeted promotions designed to encourage flexitarian diets and increase purchases of healthier, more sustainable products. Reportedly, this resulted in higher sales of Nutri-Score A and B items. However, it is not clear whether elements of this initiative were scaled up or implemented in subsequent years. In addition, on its e-commerce site, the retailer uses online algorithms to promote healthier alternatives via the 'Pour Mieux Manger' healthier-choice tool.

For Les Mousquetaires (Intermarché), no permanent in-store nutrition-focused strategy was identified. However, in April 2025, the Group's president announced plans to test the sale of healthier products at checkouts in a few stores, following recommendations from the Conseil Économique, Social et Environnemental (EESC). At the time of research, no further details had been released.

No further evidence was found of systematic efforts to guide shelf placement, increase healthier shelf space, or introduce sustained non-price nudges to promote healthier products or fruits and vegetables among the three retailers.

Responsible marketing to Children

None of the three retailers have published a codified commitment or policy on responsible marketing to children, including explicit restrictions on the marketing of unhealthy products.

BOX 5 POLICY: MARKETING REGULATIONS (HEALTHY EATING MESSAGES)

In 2024, the French government introduced rules requiring all food and drink advertisements to display one of four healthy eating messages, namely:

- Avoid snacking between meals;
- Avoid eating too much salt, sugar or fat;
- Exercise regularly;
- Eat at least five portions of fruit and vegetables every day.

This regulation applies to any promotion intended for the public, including on internet, television, radio, or printed materials. However, currently there are no policies restricting the marketing of unhealthy food and beverages.

RESPONSIBLE LABELLING

Across the three retailers, Carrefour demonstrates the strongest and most comprehensive approach to FOP labelling. Carrefour states that it has extended Nutri-Score to all of its applicable private-label products and asks all national brand suppliers to calculate and use Nutri-Score on their eligible products (see Box 9, p.32).

E.Leclerc similarly states that all Marque Repère (the company's main private-label brand) and eligible national brand products display Nutri-Score, including on its e-commerce site, but it is unclear whether the label is applied across all its private-label ranges (such as 'Eco+' or 'Nos Regions ont du Talent' products), leaving gaps in transparency.

Les Mousquetaires (Intermarché) shows partial but significant uptake, with a 2024 third-party report indicating that over 4,600 private-label products at

Intermarché and Netto carry Nutri-Score. However, the company has not updated this information since 2022, and the proportion of its total eligible portfolio covered remains unknown.

BOX 6 FRONT-OF-PACK LABELLING IN FRANCE

France has a voluntary FOP labelling system (Nutri-Score), developed by Santé Publique France, and endorsed by multiple other European governments. French retailers can participate by implementing Nutri-Score on their private-label products and websites, and may choose to reformulate products to achieve a better score.

MISSED OPPORTUNITIES FOR NUTRITION LEADERSHIP

Despite operating within a strong national nutrition policy framework, the three leading French retailers assessed show limited evidence of translating their stated ambitions into measurable nutrition outcomes. None have set public targets to increase sales of healthier products, and they do not report sales-weighted nutrition performance, limiting transparency and accountability.

While affordability is central to all three business models, strategies are not systematically aligned with nutrition objectives. There is little evidence that healthier products are deliberately prioritized through pricing, and the use of promotions, loyalty schemes, and in-store environments to encourage healthier choices remains underdeveloped. Carrefour's targeted initiatives are a positive step but have yet to be scaled across the sector.

Finally, the absence of clear commitments on responsible marketing to children represents a major gap, particularly given the retailers' influence over food environments and consumer choices for this vulnerable population.

PRODUCT PROFILES



Retailers play a key role in shaping food environments through their private-label portfolios, which influence what consumers can access and afford. ATNi's Retail Assessment 2025-2026 includes a Product Profile assessment that objectively evaluates the nutritional quality of packaged private-label foods and non-alcoholic beverages sold by the selected grocery retailers.

Applied consistently across the six countries included in the wider Retail Assessment, the Product Profile uses the same internationally recognized NPMs as ATNi's assessments of manufacturer brands. This enables cross-country comparisons and highlights opportunities for product reformulation, innovation, and diversification within national retail landscapes.

This chapter presents the results for France, focusing on the nutritional quality of the private-label portfolios of three of the largest grocery retailers: E.Leclerc, Carrefour, and Intermarché. The results for France—as well as for all other countries included in the assessment—can also be accessed through [ATNi's interactive dashboard](#).

Scope and methods

The Product Profile assesses the private-label portfolios using standardized per 100g/mL nutrient data from Innova Market Insights. All companies were invited to review and verify the dataset; however, no feedback was received. Products were screened for duplicates, implausible values, and missing key nutrients. Fresh produce, plain coffee and tea, spices, baby food, alcohol, and supplements were excluded. The final dataset is publicly accessible via ATNi's dedicated [GitHub repository](#).

Results are presented as unweighted averages, as category-specific F&B sales data for individual retailers were unavailable. Further details on data sources, categorization, proxy assumptions, and quality-control procedures are available in the [full methodology](#).

BOX 7

OVERVIEW OF NUTRIENT PROFILE MODELS AND APPROACHES

Healthiness was evaluated using three internationally recognized NPMs and approaches:

- **Health Star Rating (HSR) (2020):** A FOP labelling system developed in Australia and New Zealand that assesses nutrients of concern and positive food components per 100g or 100mL across six categories. Scores are converted to a 5-star scale; products scoring ≥ 3.5 are classified as 'healthier.' The ≥ 3.5 threshold is based on work commissioned by the New South Wales Ministry of Health in Australia, which concluded that "healthy core foods with a HSR of ≥ 3.5 can be confidently promoted in public settings as healthier choices."⁴⁰
- **Nutri-Score (2023):** A European FOP labelling system that evaluates nutrients of concern and positive food components per 100g or 100mL across five product groups—voluntary applied in France. Products are classified using a five-colour letter grade from A (healthiest) to E (least healthy). As no universal 'healthier' threshold exists, results are shown for products rated A+B and A+B+C.
- **HFSS and/or colours/flavours/NNS approach (2024):** Flags products that are high in nutrients of concern (HFSS; high in saturated fat, sugar, and sodium) and/or that contain any of three UPF markers, namely: colours, flavours, and/or NNS.⁴¹

For more detailed information on these NPMs, please see the [full methodology](#).

KEY FINDINGS

This section provides an overview of the nutritional quality of private-label portfolios for the three retailers in France (Table 1) and compares their results with global averages across all countries included in the Retail Assessment and with manufacturer-branded products in France included in ATNi's [Global Index 2024](#).

MEAN HEALTHINESS OF RETAILERS' PRIVATE-LABEL PORTFOLIOS USING HSR

The average HSR across the three French retailers (8,324 products) was low (2.7 out of 5), with minimal variation between retailers; a mean HSR of 2.8 for E.Leclerc (2,029 products); 2.7 for Carrefour (4,496 products); and 2.6 for Intermarché (1,799 products). Compared with the other countries included in this assessment, French retailers show a similar mean HSR to those in the US with a mean HSR of 2.7 (7,687

products); and the overall mean HSR of 2.7 (18,652 products) [across all 18 retailers assessed in the six countries](#).

PROPORTION OF PRIVATE-LABEL PORTFOLIOS CONSIDERED 'HEALTHIER' USING:

HSR

Across the three French retailers, a total of 8,324 private-label products were analyzed using the HSR system. Of these, 44% (3,694 products) met the 'healthier' threshold of HSR ≥ 3.5 , slightly above the overall average of 41% (7,724 out of 18,652 products) across all retailers. Meanwhile, 39% (3,260 products) of all French private-label products assessed scored 2 stars or fewer out of 5, with 13% (1,099 products) receiving the lowest rating of 0.5 stars. Among the three French retailers, E.Leclerc had the highest proportion of 'healthier' private-label products (46%), followed by Carrefour (45%) and Intermarché (41%).

TABLE 1
PRODUCT PROFILE RESULTS ACROSS THREE NUTRIENT PROFILING APPROACHES

| NPM / Approach | Retailer | | | | |
|-----------------------------------|--------------------------------------|-----------|-----------|-------------|-------|
| | Assessment criteria | E.Leclerc | Carrefour | Intermarché | Total |
| HSR | Mean HSR | 2.8 | 2.7 | 2.6 | 2.7 |
| | % healthier | 46% | 45% | 41% | 44% |
| | Healthier products (HSR ≥ 3.5) | 941 | 2023 | 730 | 3694 |
| | Total products | 2029 | 4496 | 1799 | 8324 |
| Nutri-Score | % healthier (A+B) | 25% | 27% | 23% | 25% |
| | % healthier (A+B+C) | 50% | 49% | 42% | 48% |
| | Healthier products (A+B) | 497 | 1202 | 422 | 2121 |
| | Healthier products (A+B+C) | 1022 | 2206 | 764 | 3992 |
| | Total products | 2026 | 4489 | 1816 | 8331 |
| HFSS and/or colours/flavours/ NNS | % products considered healthier | 16% | 17% | 14% | 16% |
| | Products considered healthier | 317 | 692 | 260 | 1269 |
| | Not considered healthy | 1628 | 3357 | 1588 | 6573 |
| | Total products | 1945 | 4049 | 1848 | 7842 |

Nutri-Score

Nutri-Score results reveal a similar pattern to HSR. Since Nutri-Score was not originally designed as a binary measure, both threshold approaches are presented for transparency:

- A+B threshold: 27% of Carrefour products meet this definition of 'healthier', compared with 25% at E.Leclerc, and 23% at Intermarché.
- A+B+C threshold: 50% (E.Leclerc), 49% (Carrefour), and 42% (Intermarché).

This indicates that while nearly half of the products in the private-label portfolios fall in the mid-to-healthier range (A-C), a substantial share remains less healthy (D or E).

Looking across the Nutri-Score letter grades, Carrefour's private-label portfolio performs slightly better overall, with a higher proportion of products rated 'A' (16%) compared with Intermarché (15%) and E.Leclerc (14%). However, E.Leclerc's private-label portfolio contains a smaller proportion of products rated 'E', the least healthy grade (23%), compared with Carrefour (26%) and Intermarché (32%). Therefore, the average Nutri-Score performance reflects a portfolio skewed towards moderate-to-poor nutritional quality.

PROPORTION OF PRIVATE-LABEL PORTFOLIO CONSIDERED 'UNHEALTHY' USING:

The HFSS and/or colours/flavours/NNS approach^h

The proportion of private-label products classified as 'unhealthy' under the HFSS+colours/flavours/NNS approach was relatively high across all three French retailers—86% for Intermarché (1,588 out of 1,848 products), 84% for E.Leclerc (1,628 out of 1,945 products), and 83% for Carrefour (3,357 out of 4,049 products) (Figure 7)ⁱ. This is generally aligned with the overall assessment, where 86% of private-label products across all retailers were classified as HFSS and/or highly processed (15,639 out of 18,195 products). Product categories with lower levels of processing included juice, processed fruit and vegetables, and plant-based dairy. Soups showed a moderately lower proportion of HFSS and/or UPF products (67%), while all other categories contained a substantial share of HFSS+UPF products (above 70%).

^h This approach flags high levels of fat, salt, sugar, and/or products that contain 'cosmetic additives' (colours, flavours, or NNS) as markers of UPF.

ⁱ It is important to note that the analysis covers packaged food and beverages products. Fresh fruits and vegetables were excluded from the analysis. While some retailers package fresh produce items, resulting in barcoded products included in the original dataset, these were removed.

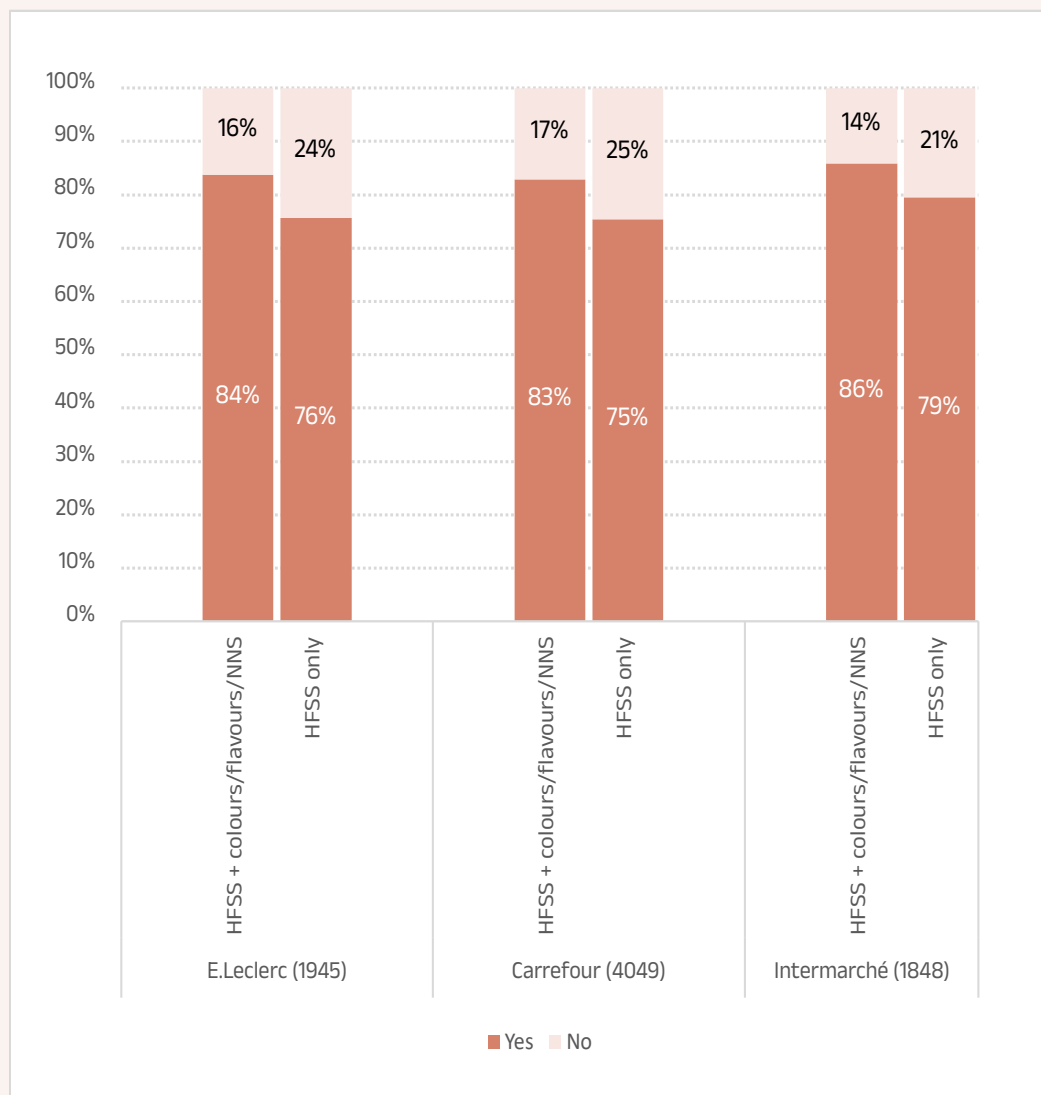
BOX 8 REDUCING LEVELS OF PROCESSING

With rising public concern in France about artificial ingredients and UPFs, all three retailers demonstrate efforts to address these issues in their public reporting. Carrefour's approach is the most developed, with the removal of controversial additives from private-label products being a core part of its nutrition strategy. The retailer reports having banned 100 such substances in 2018, with plans to eliminate an additional 120 by 2026. Carrefour also applies a group-wide classification system (black, red, purple and orange) to guide whether additives should be eliminated, restricted, or substituted; where no suitable alternatives exist, it reduces quantities while seeking cleaner replacements.

E.Leclerc states that several 'Marque Repère' private-label product lines—such as yoghurts, cheeses, and children's ice-creams—only use natural colourings and flavourings. Les Mousquetaires (Intermarché) includes "reformulating recipes and removing controversial ingredients for a higher nutritional quality (less salt, less fat, shorter lists of ingredients, etc.)" as part of its approach to nutrition, though no specific information about these efforts or respective targets were found in its latest reporting.

FIGURE 7

PROPORTION OF PRODUCTS CLASSIFIED AS HFSS AND/OR CONTAINING COSMETIC ADDITIVES (COLOURS, FLAVOURS, NON-NUTRITIVE SWEETENERS)



Together, these Product Profile findings highlight the importance of interpreting results across multiple models. While nutrient-based scores may improve following product reformulation, processing-based indicators persist if cosmetic additives or sweeteners remain present.

Comparing product categories across retailers using Nutri-Score

Across the 27 product categories assessed, Nutri-Score results reveal substantial variation in nutritional quality, although differences between retailers within the same category are generally limited. The results for grouped categories are shown in Figure 8.

Categories composed largely of staple foods or minimally processed products—such as processed fruit and vegetables, rice, pasta and noodles, edible oils, flour, and plant-based dairy—consistently show a high share of products rated A or B, with many categories exceeding 80% of products in the A-C range.

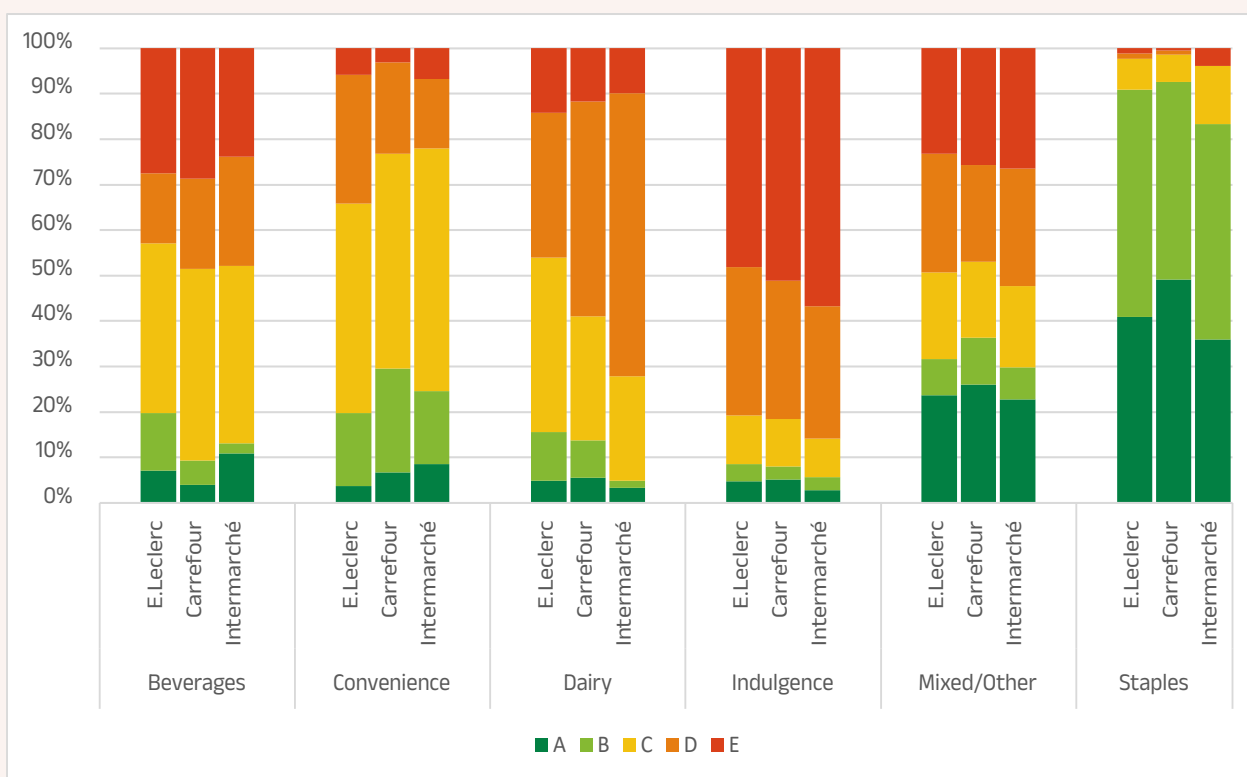
In contrast, indulgence-oriented categories—including confectionery, ice cream, savoury snacks, sweet biscuits and sweet spreads—are dominated by lower Nutri-Score grades, with few or no products rated A or B.

These categories contribute disproportionately to the overall share of less healthy private-label products.

Other categories, such as dairy (including dairy and plant-based dairy), beverages (bottled water, carbonates, concentrates, juice, ready-to-drink coffee, tea and other hot drinks), and mixed/other (baked goods, breakfast cereals, processed fruit and vegetables, processed meat and seafood, sauces and dips), show mixed Nutri-Score performance. Although some products fall within the A-C range, a relatively high share is rated D and E, indicating meaningful scope for reformulation and portfolio rebalancing within these categories.

ATNi's [interactive dashboard](#) provides a more detailed comparison of category level results across retailers and the six countries included in the overall Retail Assessment.

FIGURE 8
DISTRIBUTION OF NUTRI-SCORE GRADES ACROSS PRIVATE-LABEL PRODUCT CATEGORIES FOR THE THREE FRENCH RETAILERS



Comparing private-label with global manufacturer portfolios using HSR

At an aggregate industry level, French retailers' private-label portfolios (6,202 products in total) show slightly higher healthiness than manufacturer-branded products (4,487) sold in France by 12 leading F&B manufacturers assessed in ATNi's [Global Index 2024](#). Across all categories, private-label products have a higher mean HSR (2.6) than manufacturer products (2.3), and a greater share meet the healthier threshold (HSR \geq 3.5) (38% vs. 31%) (Table 2).

At the category level, the most pronounced difference is observed in plant-based dairy, where private-label products perform substantially better than

manufacturer products (mean HSR 4.1 vs. 2.9; 91% vs. 53% meeting the healthier threshold). Private-label products also perform better in sauces, dips and condiments, savoury snacks, and sweet biscuits and snack bars, though differences are more modest.

These findings are consistent with evidence from other markets. A study from New Zealand found that private-label products had a higher proportion of items with an estimated HSR \geq 3.5 compared to branded packaged foods.⁴² Similarly, an Australian study analyzing the sodium content of 15,680 private-label and branded products sold across four major supermarkets (2011–2013) reported that private-label products generally performed better than branded equivalents on sodium levels.⁴³

TABLE 2
COMPARISON OF MEAN HSR BETWEEN PRIVATE-LABEL PRODUCTS AND MANUFACTURER PRODUCTS IN FRANCE, AS ASSESSED IN ATNi'S GLOBAL INDEX

| Category | Private-label products | | | | Manufacturer products ^j | | | |
|--------------------------|------------------------|----------------------|--------------------|----------------|------------------------------------|---------------------------|------------------------|---------------------|
| | Mean HSR | % healthier products | Healthier products | Total products | GI - Mean HSR | GI - % healthier products | GI- Healthier products | GI - Total products |
| Baked Goods ⁱ | 2.2 | 27% | 207 | 776 | 3.0 | 57% | 131 | 229 |
| Bottled Water | 4.0 | 70% | 38 | 54 | 4.2 | 89% | 117 | 132 |
| Breakfast Cereals | 3.1 | 38% | 58 | 153 | 2.7 | 35% | 14 | 40 |
| Carbonates | 1.4 | 2% | 1 | 48 | 1.8 | 8% | 4 | 48 |
| Concentrates | 0.8 | 8% | 4 | 53 | 0.8 | 0% | 0 | 15 |
| Confectionery | 0.8 | 1% | 5 | 345 | 0.9 | 8% | 69 | 886 |
| Dairy | 3.2 | 56% | 578 | 1024 | 3.2 | 55% | 597 | 1092 |
| Ice Cream | 1.6 | 0% | 0 | 131 | 2.1 | 3% | 18 | 679 |
| Juice | 2.2 | 9% | 30 | 343 | 1.4 | 1% | 1 | 78 |
| Other Hot Drinks | 1.4 | 11% | 5 | 47 | 2.2 | 15% | 3 | 20 |
| Plant-based Dairy | 4.1 | 91% | 43 | 47 | 2.9 | 53% | 34 | 64 |
| Ready Meals | 3.2 | 63% | 490 | 774 | 3.5 | 93% | 14 | 15 |

^j This includes 12 manufacturers featured in ATNi's Global Index 2024 that are active in France and for which the France ranks among their top five markets by sales.

TABLE 2 (CONT.)

COMPARISON OF MEAN HSR BETWEEN PRIVATE-LABEL PRODUCTS AND MANUFACTURER PRODUCTS IN FRANCE, AS ASSESSED IN ATNI'S GLOBAL INDEX 2024

| | Private-label products | | | | Manufacturer products ¹ | | | |
|---|------------------------|----------------------|--------------------|----------------|------------------------------------|---------------------------|-----------------------|---------------------|
| Category | Mean HSR | % healthier products | Healthier products | Total products | GI - Mean HSR | GI - % healthier products | GI-Healthier products | Gi - Total products |
| Rice, Pasta and Noodles | 3.9 | 96% | 252 | 262 | 3.9 | 89% | 132 | 149 |
| RTD Tea | 1.7 | 5% | 2 | 40 | 1.9 | 0% | 0 | 18 |
| Sauces, Dips and Condiments | 2.7 | 39% | 229 | 581 | 2.2 | 16% | 68 | 424 |
| Savoury Snacks | 2.9 | 40% | 266 | 665 | 2.5 | 28% | 26 | 92 |
| Soup | 3.1 | 72% | 83 | 116 | 3.4 | 72% | 170 | 237 |
| Sweet Biscuits, Snack Bars and Fruit Snacks | 1.4 | 7% | 41 | 613 | 1.2 | 2% | 6 | 260 |
| Sweet Spreads | 1.9 | 5% | 6 | 130 | 0.7 | 0% | 0 | 9 |
| Total | 2.6 | 38% | 2338 | 6202 | 2.3 | 31% | 1404 | 4487 |

BOX 9

INFLUENCING SUPPLIERS TO IMPROVE THE HEALTHINESS OF THEIR PRODUCTS

Given their powerful position in the food value chain, retailers have the opportunity to influence their suppliers (manufacturers of (inter-)national brands) to improve the healthiness of their products. Through its 'Food Transition Pact', Carrefour works with suppliers to improve the nutritional quality of processed products. Signatories are encouraged to commit to reducing salt, sugar and saturated fat, phasing out controversial additives, and improving transparency through clearer FOP labels and digital tools. The Pact also promotes healthier alternatives by expanding organic, plant-based and gluten-free ranges and boosting the share of 'healthy baskets' in Carrefour's offering.⁴⁴

In addition, Carrefour requires its national brand suppliers to apply Nutri-Score labelling to their products or risk exclusion from its online 'Pour Mieux Manger' tool, which suggests healthier alternatives on its e-commerce site and shopping app.

FORTIFICATION

Food fortification in France is primarily governed by EU Regulation No 1925/2006, which sets the conditions for the addition of vitamins, minerals, and certain other substances to foods. The regulation specifies which vitamins and minerals may be added, the authorized forms and substances, and applicable labelling requirements.⁴⁵

In France, vitamin D fortification is permitted but not mandatory. Similarly, regulations on salt iodization and fluoridation are voluntary.

An analysis of 18 private-label salt products from E.Leclerc, Carrefour, and Intermarché found no publicly available evidence indicating that these products were iodized or fluoridated. This may suggest that retailer participation in voluntary salt iodization or fluoridation is limited. With mild iodine deficiency re-emerging across Europe—particularly among young women and pregnant women—retailers have an opportunity to contribute to improved public health outcomes by iodizing their private-label salt products.⁴⁶



PROMOTIONS



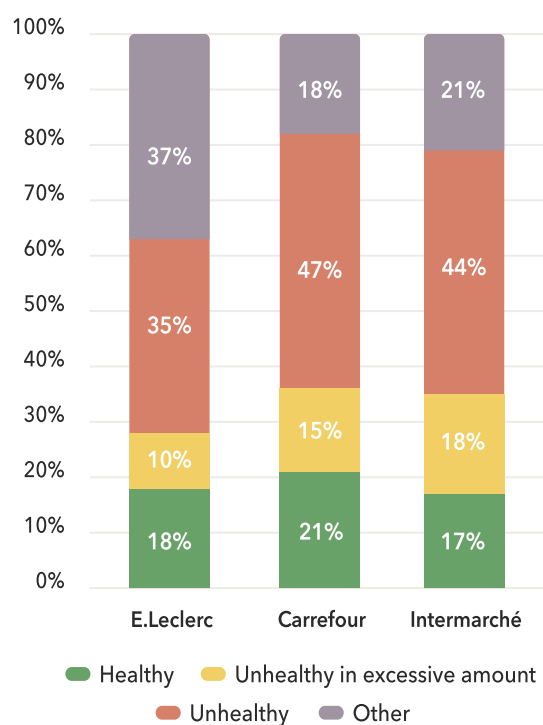
As part of ATNi's Retail Assessment 2025-2026, an independent analysis was conducted of F&B promotions featured in the flyers of the three grocery retailers assessed in France. The Retailer Profile, which examined whether companies have policies or campaigns to increase the share of promotions on 'healthier' products, found limited evidence of systematic strategies to prioritize nutritious foods in promotional activities, with the exception of selected or time-bound initiatives implemented by Carrefour.

This research component examines how frequently products classified as 'healthy', 'unhealthy in excessive amounts', and 'unhealthy' are promoted in practice, highlighting the balance of promotional emphasis across key food categories. The categorization approach builds on the Global Diet Quality Score framework, adapted for the purposes of this assessment. Further details on the methodology and classification framework are outlined in the [full methodology](#); a summary of the key findings for E.Leclerc, Carrefour, and Intermarché is provided below.

A total of 1,204 food products were analyzed from two biweekly flyers (PDFs) with the promotions from E.Leclerc, Carrefour, and Intermarché. On average, Carrefour flyers featured more products per issue (n=240) compared with E.Leclerc (n=200) and Intermarché (n=163).

Figure 9 summarizes the proportion of promoted foods categorized as 'healthy', 'unhealthy in excessive amounts', 'unhealthy', and other products. Overall, each retailer allocated less than one-fourth of their flyer space to the promotion of 'healthy' products. Carrefour featured the highest share of 'healthy' items (21%), followed by E.Leclerc (19%) and Intermarché (17%). While E.Leclerc had the lowest proportion of 'unhealthy' food promotions, a substantial share of its advertisements (37%) fell under the 'other' category, primarily alcoholic beverages and other items excluded from the healthiness assessment.

FIGURE 9
PROPORTION OF HEALTHY, UNHEALTHY IN EXCESSIVE AMOUNTS, UNHEALTHY, AND OTHER PRODUCTS



* Values are rounded to the nearest point

Table 3 presents the proportion of specific 'healthy' food groups promoted in each flyer. Carrefour, which had the highest overall percentage of 'healthy' foods, devoted most of its healthy promotions to fish and shellfish (6%), followed by fruits (3%) and vegetables (3%). E.Leclerc and Intermarché displayed comparable patterns, although at lower proportions. Notably, E.Leclerc promoted 'healthy' ready meals (3%) and low-fat dairy products (2%) slightly more frequently than the other two retailers.

TABLE 3
MEAN PERCENT OF HEALTHY
FOOD INCLUDED IN FLYERS

| Healthy Food Group | E.Leclerc | Carrefour | Intermarché |
|------------------------------|-----------|-----------|-------------|
| All fruits | 2.3% | 3.4% | 2.2% |
| Citrus fruits | 0.0% | 0.6% | 0.0% |
| Deep orange fruits | 0.2% | 0.4% | 0.0% |
| Other fruits | 2.1% | 2.3% | 2.2% |
| All vegetables | 3.5% | 2.9% | 3.0% |
| Dark green leafy vegetables | 0.0% | 0.2% | 0.0% |
| Cruciferous vegetables | 0.0% | 0.0% | 0.0% |
| Deep orange vegetables | 1.0% | 0.6% | 3.0% |
| Other vegetables | 2.5% | 2.1% | 0.6% |
| Legumes | 0.8% | 0.2% | 0.6% |
| Deep orange tubers | 0.0% | 0.0% | 0.0% |
| Nuts and seeds | 0.7% | 0.2% | 0.3% |
| Whole grains | 0.2% | 0.2% | 0.3% |
| Fish and shellfish | 3.9% | 6.4% | 5.0% |
| Poultry and game meat | 1.3% | 2.1% | 1.9% |
| Low fat dairy | 2.2% | 1.4% | 1.8% |
| Eggs | 0.2% | 0.6% | 0.3% |
| Healthy ready meals | 2.9% | 2.1% | 1.2% |
| Unsweetened beverages | 1.4% | 1.3% | 0.7% |

Table 4 summarizes the promotion of 'unhealthy' food groups across the retailers. Sweets and ice cream (11-12%) consistently ranked among the most frequently promoted 'unhealthy' products across all three retailers, followed by refined grains, baked goods, and snacks (8-11%). High-fat dairy products were the most frequently promoted in Intermarché flyers (13%) and also appeared quite prominently in Carrefour flyers (11%), mainly in the form of cheese and yoghurt. 'Unhealthy' ready meals were promoted more often than their healthier counterparts across all three retailers, and were particularly a prominent category in Intermarché flyers (11%).

TABLE 4
MEAN PERCENT OF UNHEALTHY
IN EXCESSIVE AMOUNT AND
UNHEALTHY FOOD INCLUDED IN
FLYERS

| Unhealthy Food Group | E.Leclerc | Carrefour | Intermarché |
|---|-----------|-----------|-------------|
| High-fat dairy* | 5.9% | 10.6% | 13.1% |
| Red meat* | 3.9% | 3.1% | 3.8% |
| Oils and fats* | 1.0% | 0.9% | 0.9% |
| Processed meat | 5.4% | 10.3% | 7.8% |
| Sauces, dips, and condiment | 1.7% | 3.3% | 2.2% |
| Refined grains, baked goods, and snacks | 7.6% | 10.7% | 8.1% |
| Sweets and ice cream | 11.6% | 11.7% | 11.1% |
| Sugar-sweetened beverages | 3.0% | 4.2% | 3.2% |
| Juice | 1.2% | 1.9% | 0.6% |
| White roots and tubers | 0.8% | 0.0% | 0.3% |
| Purchased deep fried foods and unhealthy ready meals | 5.6% | 4.8% | 11.1% |

* Foods that are unhealthy in excessive amount

Our findings are consistent with a recent survey on the nutritional quality of supermarket flyers conducted by Consommation Logement Cadre de Vie. The survey reported that 'unhealthy' food groups, such as cold cuts, confectionery, biscuits and cakes, sweetened breakfast cereals, and SSBs, accounted for 37% of the promotions in the catalogues analyzed, a proportion comparable to our own results.⁴⁷ Conversely, the proportion of promotions for 'healthy' foods was much lower, only 3% of promotions featured fresh fruit and 5% featured fresh vegetables.⁴⁷ When comparing retailers, the share of promotions highlighting fruits, vegetables, legumes, and nuts was highest at Carrefour (10%), followed by Intermarché (9%) and E. Leclerc (7%).⁴⁷ Overall, these results underscore the underrepresentation of healthier food options in French retailers' promotional strategies.



COST AND AFFORDABILITY

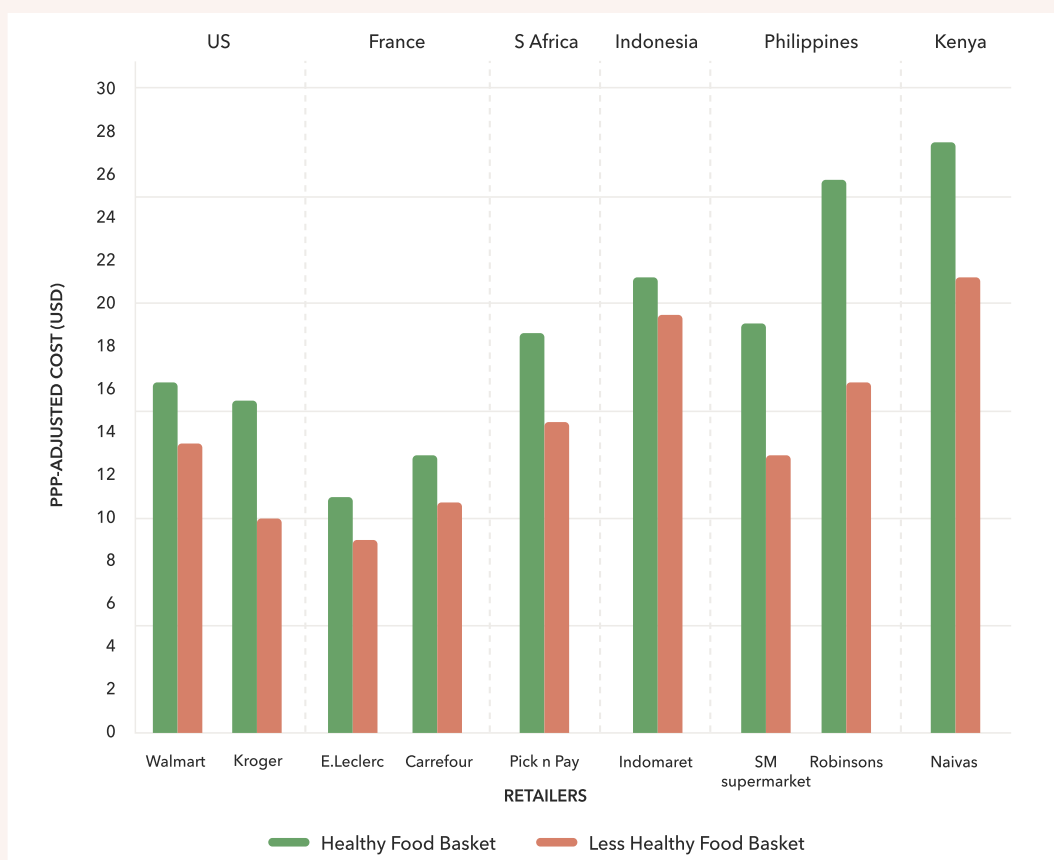


A pricing analysis compares the cost and affordability of healthier versus less healthy diets across the six countries included in ATNi's Retail Assessment 2025-2026—the US, France, Indonesia, South Africa, Kenya, and the Philippines—using a standardized food basket approach. Retail food baskets were constructed based on the EAT-Lancet Reference Diet, representing 'healthier' and 'less healthy' baskets. The full report, including the methodology, data sources, analytical framework, results, and recommendations, is available in the ATNi Retail Assessment [Pricing Analysis](#). Pricing

data was available for nine of the 18 retailers assessed.

In France, the analysis covered two of the three assessed retailers—E.Leclerc and Carrefour—for which pricing data were available. Pricing data for Intermarché could not be obtained due to heavy blocking measures on its website. Across both retailers, healthier food baskets were consistently more expensive than less healthy baskets (Figure 10), confirming the overall pattern observed across the six countries included in ATNi's Retail Assessment 2025-

FIGURE 10
THE COST OF HEALTHIER AND LESS HEALTHY RETAIL FOOD BASKETS PER PERSON PER DAY AMONG SELECTED RETAILERS



2026. In absolute terms, French baskets were among the most affordable in the global sample. E.Leclerc offered the lowest-cost healthier basket across all retailers assessed, reflecting its strong focus on price competitiveness, while Carrefour's healthier basket was more expensive, consistent with its more premium and differentiated market positioning.

When expressed as a proportion of daily per capita net income (Table 5), healthier baskets accounted for 9.0% at E.Leclerc and 11.1% at Carrefour, compared with 7.3% and 8.9%, respectively, for less healthy baskets. These results place France among the most affordable contexts for both healthier and less healthy food baskets, reflecting relatively high income levels and purchasing power. However, the relative affordability gap persists, with healthier options consistently requiring a higher share of income than less healthy ones.

The French results highlight a price gap paradox in the retail food environment. Strong competition on price—particularly among discounters and cooperative models such as E.Leclerc—contributes to relatively low food prices and high overall affordability. However, this

competitive dynamic has not led to a narrowing price gap between healthier and less healthy foods, which remains structurally embedded in market pricing patterns. As in other countries, these differentials are likely driven more by upstream cost structures and market dynamics than by explicit retailer pricing strategies aimed at nutrition.

For the two retailers included in the pricing analysis, affordability is positioned primarily as a commercial and competitive objective rather than as a lever for improving dietary quality. E.Leclerc's strategy focuses on price leadership across the overall basket, contributing to low absolute prices for both healthier and less healthy foods, but does not specifically prioritize the relative affordability of healthier options. Carrefour combines price competitiveness with a more differentiated and premium offer, including a stronger emphasis on quality, sustainability, and product attributes, which is reflected in higher overall basket prices. In neither case is pricing explicitly framed as a tool to shift consumption towards healthier products, and there is no evidence of systematic price incentives designed to favour healthier choices relative to less healthy ones.

TABLE 5
AFFORDABILITY OF HEALTHIER AND LESS HEALTHY RETAIL FOOD BASKETS
ACROSS THE SIX ASSESSED COUNTRIES

| Income | Country | Retailer | Healthier retail food basket | | Less healthy retail food basket | |
|--------------|-----------------|----------------|------------------------------|-------------------------------|---------------------------------|-------------------------------|
| | | | % daily per capita GNI | % daily per capita net income | % daily per capita GNI | % daily per capita net income |
| Upper | US | Walmart | 6.89 | 11.10 | 5.82 | 9.37 |
| | | Kroger | 6.66 | 10.72 | 4.20 | 6.76 |
| | France | E.Leclerc | 6.27 | 8.99 | 5.10 | 7.30 |
| | | Carrefour | 7.69 | 11.01 | 6.21 | 8.89 |
| Upper-middle | Indonesia | Indomaret | 48.90 | 100.10 | 44.16 | 90.38 |
| | South Africa | Pick n Pay | 44.72 | 28.28 | 34.35 | 21.72 |
| Lower-middle | The Philippines | SM Supermarket | 52.63 | 31.91 | 35.68 | 21.63 |
| | | Robinsons | 71.19 | 43.16 | 44.32 | 26.87 |
| | Kenya | Naivas | 154.40 | 64.58 | 116.69 | 48.81 |

*GNI: gross national income

BOX 10

POLICY: FISCAL POLICIES AFFECTING NUTRITION IN FRANCE

France has a SSB tax since 2012. Revised in 2018, the tax uses a sliding scale based on sugar content, with separate rates for added sugar, non-caloric sweeteners, and natural or artificial waters.⁴⁸ In response to limited reformulation effects from the tax, a further amendment was introduced in 2023 to increase the taxation rates. In addition, a second amendment was introduced regarding the taxation of added sugars in other processed foods; however, at the time of writing, it has not yet been implemented.⁴⁹

From a public health perspective, the persistence of this affordability gap undermines efforts to promote healthier diets, particularly among lower-income households who are more sensitive to price. Therefore, the findings suggest that French retailers have an opportunity to go beyond general price competition and play a more proactive role in improving the affordability of healthier diets.

The full report, including the methodology, data sources, analytical framework, results, and recommendations, is available in the ATNi Retail Assessment [Pricing Analysis](#).



CONCLUSION AND RECOMMENDATIONS



ATNi's France Retail Assessment 2026 indicates that leading grocery retailers—E.Leclerc, Carrefour, and Intermarché—have integrated nutrition to some extent into their corporate strategies and ESG commitments. Carrefour demonstrates the most advanced approach, with structured nutrition governance, reformulation initiatives, and loyalty programmes promoting healthier options. All three retailers have widely adopted Nutri-Score labelling across their private-label portfolios, reflecting strong alignment with government-endorsed nutrition guidance.

Despite these positive steps, significant gaps remain. Most private-label products remain unhealthy due to high levels of fat, salt, or sugar and/or the inclusion of additives that indicate ultra-processing. Only 25% of products meet the criteria for the Nutri-Score grades A or B, while 44% meet the HSR 'healthier' threshold of 3.5 or above. In addition, promotional activities heavily favour unhealthy products, with less than one-quarter of flyer space allocated to healthier items, and healthier food baskets remain more expensive than less healthy alternatives. Collectively, these findings underscore the persistent gap between corporate nutrition commitments and the tangible improvements needed to drive healthier food environments and consumer choices in France.

French retailers have the scale, market reach, and influence to shape and accelerate healthier diets, but real progress hinges on adopting a coordinated, measurable approach across product reformulation, responsible marketing, promotion, and pricing.

FOR RETAILERS

1 Strengthen nutrition governance and accountability

- Recognize consumer health and nutrition as a material issue within ESG and enterprise risk assessments and publicly disclose nutrition-related risks.
- Embed nutrition across commercial operations with clear executive level accountability and board oversight.
- Link executive remuneration to measurable nutrition KPIs (e.g. share of private-label sales meeting 'healthier' criteria, reduced nutrients of concern, or the share of promotions featuring healthier products).
- Report annually on nutrition governance, progress, and portfolio healthiness by retail banner or store format.

2 Set measurable targets and report transparently

- Set specific, time-bound targets to increase the share of healthier private-label products (e.g. Nutri-Score A/B or A/B/C, HSR ≥ 3.5) and monitor progress.
- Disclose the NPM used, baseline data, and annual progress to enable accountability and independent comparison.

3 Improve portfolio composition through (re-) formulation

- Strengthen the nutritional quality of private-label portfolios by reducing sodium, sugar, saturated fat, and unnecessary additives, while expanding minimally processed options.
- Set reformulation targets for high-volume categories with lower Nutri-Score or HSR performance (e.g. sweet biscuits, confectionery, processed meats, snacks, spreads).
- Collaborate with suppliers to encourage reformulation and innovation across the supply chain.

4 Rebalance promotions towards healthier products

- Increase the share of healthier products in flyer, e-commerce, and loyalty programme promotions.
- Monitor and publicly report the share of promotions by product healthiness using a clear definition of 'healthy'.
- Enhance in-store and online product placement, shelf positioning, and visibility of healthier products.

5 Strengthen responsible marketing, particularly to children

- Prohibit the marketing of products that fail to meet nutrition standards to children under 18 across all marketing channels, implementing a policy in line with WHO and [UNICEF guidance](#).
- Audit compliance through independent third parties and report publicly.

6 Address affordability gaps

- Embed affordability into nutrition strategies by defining 'healthy' and 'affordable' products and reporting progress transparently.
- Reduce price gaps between healthier and less healthy options through lower-priced private-label products, targeted discounts, and loyalty incentives.
- Expand access to healthier options across store formats, locations, and e-commerce channels, particularly for lower-income consumers.

FOR POLICY MAKERS

A [policy brief](#) is published separately including more details.

- 1 Introduce comprehensive restrictions on the marketing of unhealthy food and beverages**
 - These should include restrictions on the in-store placement and promotion of less healthy products (as determined by an NPM), and equivalent restrictions for online retail environments.
 - Restrictions should also apply to advertising across television and digital media platforms.
- 2 Mandate companies to report publicly on the share of sales derived from healthier products, to encourage transparency and corporate accountability.**
 - This should use a clear definition of healthy, for example products meeting Nutri-Score A or B.
- 3 Raise rates of the existing SSB tax to increase retail prices of SSBs by at least 20%**
 - This would ensure the tax is in line with World Health Organization and World Bank's guidance for optimal health impact.⁴⁸
- 4 Consider additional health taxes on other discretionary, nutrient-poor food categories to further discourage unhealthy consumption and promote industry reformulation.**
 - Additionally assess fiscal policies including both taxes and subsidies and ensure that these are aligned to support affordability of healthier foods.
- 5 Explore opportunities to increase the visibility of Nutri-Score to consumers, such as requiring retailers to display Nutri-Score on shelf tags and in promotional flyers and other forms of marketing.**

FOR INVESTORS

- 1 Use ATNi's data and the [Investor Expectations on Nutrition, Diets and Health](#) to integrate nutrition into sustainable investment strategies, enabling them to:**
 - Assess the extent to which retailers are exposed to nutrition-related risks and opportunities.
 - Prioritize investments in retailers expanding access to healthy food.
 - Identify opportunities for investments in new technologies and innovations that deliver healthier foods to consumers.
- 2 Regularly engage with retailers to encourage them to:**
 - Publicly set and report against time-bound targets to drive portfolio healthiness, in line with the recently developed [Reporting Guidelines](#) and use Nutri-Score as the assessment metric.
 - Use promotional techniques to drive sales of healthier products relative to less healthy products, and to ensure only healthier products are marketed to children.
 - Assign oversight and accountability for nutrition to a senior executive, including by linking executive remuneration to nutrition KPIs.
 - Address affordability gaps between healthy and less healthy products, particularly for low-income consumers.
- 3 Engage with policymakers and standard-setters to create enabling environments which:**
 - Drive investments towards shaping healthier food environments.
 - Expand healthy food retail in low-income settings.
 - Foster transparent and standardized reporting by food retailers on nutrition.

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