FRANCE RETAIL POLICY BRIEF 2026

TOWARDS HEALTHIER FOOD ENVIRONMENTS:

REGULATING FRANCE'S FOOD RETAIL SECTOR

KEY MESSAGES

1. The rising consumption of ultra-processed foods high in fat, salt, or sugar threatens to derail progress on non-communicable diseases.
2. ATNi's research focuses on the nutrition practices and performance of the three largest retailers in France, highlighting that unhealthy products continue to dominate retailers' portfolios and promotions.
3. French policymakers can support healthier and more sustainable diets through regulations that restrict the marketing of unhealthy foods, especially to children—and by requiring companies to report on their sales of healthier and more sustainable products.

INTRODUCTION

While France's obesity rate remains well below the Western European average, this nonetheless translates to about 6 million adults living with obesity, representing a significant health challenge to address. Diabetes rates are also rising, now affecting 4 million French people.[1,2] While clinically defined micronutrient deficiencies are relatively uncommon, population-level data show widespread deficiencies 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]

Adding to this challenge, consumption of ultra-processed foods has increased in recent years. In 2023, ultra-processed foods accounted for 42% of total food and beverage sales.[4] As these foods are often energy-dense and high in saturated fat, salt, or sugar, and tend to displace more nutrient-rich foods, their growing share risks undermining progress made in supporting awareness of, and access to, healthier diets in France.

At the same time, dietary patterns remain characterized by high levels of processed meat consumption. An estimated 63% of the population exceeds the recommended maximum intake of processed meat, increasing the risk of non-communicable diseases such as high blood pressure, cardiovascular disease, type 2 diabetes and certain cancers. Beyond health impacts, high meat consumption also raises concerns for the transition toward more sustainable diets.[5]

Modern grocery retail—including hypermarkets, supermarkets, and convenience stores —represents 92.5% of the food retail market, playing a central role in French diets. Market leaders E.Leclerc, Carrefour and Les Mousquetaires Group (Intermarché) operate nationwide and reach consumers across urban and rural areas and socio-economic groups. Given this scale, modern retailers have a key role to play in supporting transitions to healthier and more sustainable diets. However, while offering greater variety, competitive pricing, and accessibility, modern retail also drives the widespread availability of industrially produced foods high in fat, salt, or sugar, with evidence showing that most foods sold by supermarkets are ultra-processed.

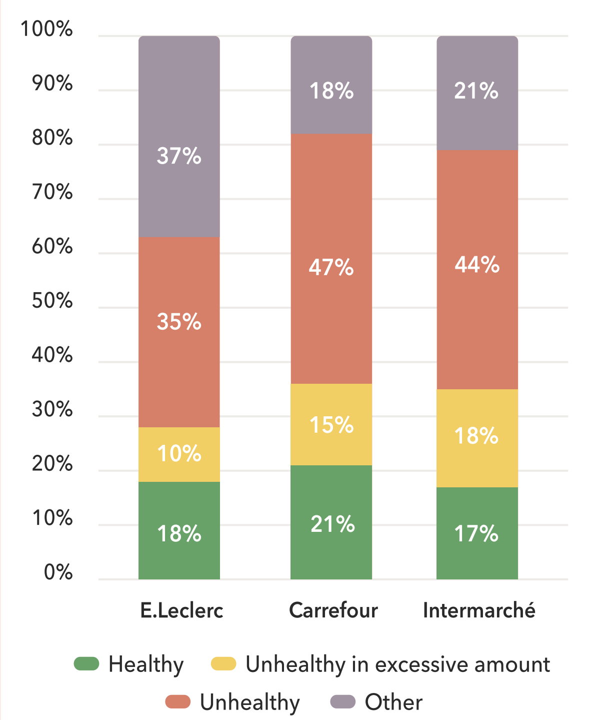
ABOUT ATNi'S RETAIL ASSESSMENT 2025

The France Retail Assessment was carried out by ATNi, a global foundation headquartered in the Netherlands that actively challenges the food industry, investors, and policymakers to shape healthier food systems.

ATNi's France Retail Assessment highlights the contribution of France's largest modern retailers–E.Leclerc, Carrefour and Les Mousquetaires Group (Intermarché)– to unhealthy food environments. It examines their nutrition strategies and commitments, the healthiness of their private-label products, their promotional practices, and the affordability of a healthier food basket.

For more information about ATNi, visit our website. Find more details about the research findings that this policy brief is based on here.

FIGURE 1
PROPORTION OF HEALTHY, UNHEALTHY IN EXCESSIVE AMOUNT, UNHEALTHY, AND OTHER PRODUCTS



* Values are rounded to the nearest point

ATNI'S FRANCE RETAIL ASSESSMENT FINDINGS

Products promoted by retailers are generally unhealthy

ATNi's analysis of products featured in weekly promotional flyers of the three selected retailers found that promotional space is skewed toward less healthy options (Figure 1). Each retailer allocated less than one quarter of flyer space to the promotion of healthy products, while sweets and ice cream, followed by refined grains, baked goods and snacks, dominated unhealthy promotions across all three retailers.[6]

These results are in line with recent research on promotional flyers in France. Analysis by CAN France, Foodwatch and France Assos Santé showed that 66% of the items sold in promotional flyers are contrary to French food-based dietary guidelines, in particular HFSS products, as well as red meat and processed meat.[6]

Most private-label products sold by leading retailers are unhealthy

Limited attention to the promotion of healthier options is also reflected in the limited availability of healthy products in retailers' own portfolios. Only a quarter of private-label products sold by E.Leclerc (25%), Carrefour (27%), and Intermarché (23%) were found to be healthier, with a Nutri-Score of A or B,[1] while 84% of products assessed were high in fat, salt, and sugar, and/or contained markers of ultra-processing (colours/flavours/non-nutritive sweeteners).

[1] Based on an analysis of 8321 private label products.

Less healthy food baskets are more affordable than healthier ones

ATNi's independent pricing analysis[2] of E.Leclerc and Carrefour found that healthier food baskets were, on average, 23.5% more expensive than less healthy food baskets. Furthermore, a healthy food basket was found to represent 9% (E.Leclerc) to 11% (Carrefour) of daily per capita net income, compared to 7.3% (E.Leclerc) to 8.9% (Carrefour) for a less healthy food basket. While the share of overall per capita net income was the lowest of the six countries assessed, the difference in affordability between healthy and less healthy options presents a barrier for consumers on limited budgets.

Retailers' commitments on sustainability

The France Retail Assessment findings complement recent studies of the climate and environmental contributions of French and European supermarkets by Climate Action Network France (CAN France) and the Dutch thinktank Questionmark. CAN France's benchmark of eight French supermarkets highlighted retailers' lack of transparency on reporting on greenhouse gas (GHG) emissions, few commitments to reduce emissions and sales of unsustainable products, as well as significant gaps in the promotion of sustainable products.[7]

Similarly, Questionmark's 2026 Superlist study of 27 leading supermarket chains across eight European countries further shows that French retailers Intermarché and E.Leclerc lag behind other major European retailers on their contributions to a sustainable food system.[8]

[2] Due to limited data availability, pricing data could not be obtained for Intermarché.

RECOMMENDATIONS TO POLICYMAKERS

Because of the outsized influence retailers have on French diets, it is important that nutrition and sustainability policies take them into account. France is well placed to do so, with a robust nutrition policy framework guided by the National Nutrition and Health Programme (PNNS), the National Food Programme (PNA), and the anticipated French National Strategy for Food, Nutrition and Climate (SNANC).

France has already adopted several policies to improve the food environment, including the voluntary adoption of Nutri-Score, sugar-sweetened beverage (SSB) taxes, required warnings on advertisements for unhealthy foods, and restrictions on certain price promotions (e.g. 'Buy one, get one free' offers and discounts greater than 34%). However, introducing additional restrictions on the marketing of unhealthy foods would further support consumers in choosing healthier diets.

To further improve the French nutrition policy landscape, policymakers may wish to consider the following steps:

1. **Introduce restrictions on the promotion and marketing of unhealthy food and beverages.**

- Policymakers can draw on examples such as the UK, which since 2021 has had restrictions (in England specifically) on the promotion and placement of less healthy foods and beverages by location in stores and equivalent places online. The UK recently introduced regulations that will prohibit adverts for less healthy products on TV (before 21:00) and online.[9]
- Policymakers are also encouraged to explore levers that ensure promotional flyers and other forms of marketing support the incoming new dietary guidelines, and support diets that are environmentally sustainable. For example, policymakers could set requirements for a minimum percentage of promotions to feature foods recommended in dietary guidelines.

2 **Increase corporate transparency and accountability by requiring companies to publicly report the share of sales derived from healthier and sustainable products.**

- This is in line with policy developments in other countries such as the UK, where there are plans to mandate large food and beverage companies to report on the healthiness of sales.[10]

- Reporting should be guided by a clear definition of healthy, for example products meeting Nutri-Score A or B.

- Policymakers are encouraged to enact similar requirements for reporting on sales from environmentally sustainable products. This can follow, for example, the World Wildlife Fund's (WWF) UK Food Retailer Methodology for Healthy, Sustainable Diets Disclosure, which provides guidance for reporting and showing progress on sales of protein types, pre-prepared and composite products, as well as the rebalancing of food baskets.[11]

3 **Strengthen the existing SSB tax** by increasing rates so that retail prices of SSBs rise by at least 20%, in line with WHO guidance for optimal health impact.[12]

- Assess fiscal policies, including both taxes and subsidies, and ensure that these are aligned to support the affordability of healthier foods.

4 **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.

CALL TO ACTION

France has made commendable progress in promoting healthier diets, but rising consumption of ultra-processed foods threatens to reverse these gains. Modern retailers hold both the power and the responsibility to shape food environments that support health. Policymakers can reinforce this by strengthening regulations that limit unhealthy marketing and ensure affordability and visibility of nutritious options.

By introducing restrictions on the promotion of unhealthy foods, aligning marketing practices with dietary guidelines, and ensuring that the healthy choice is the easy and affordable choice, France can safeguard its nutrition achievements and set a global example. With the total economic cost of overweight and obesity projected to reach more than €56bn, or 2.09% of gross domestic product, by 2030,[13] the time is now for France to take action.

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