



Euromonitor  
International

# Self-Service Cafeterias in Italy

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Table of Contents

## KEY DATA FINDINGS

### 2025 DEVELOPMENTS

Momentum favours chains, but the channel remains squeezed by fast casual competition

### INDUSTRY PERFORMANCE

Chains pull ahead as independents struggle to protect footfall

Sustainability becomes a stronger point of differentiation

Eat-in dominates, while leaders test online ordering and deepen inclusion initiatives

### WHAT'S NEXT?

Category value sales likely to decline as independents remain exposed

Eat-in remains central, while online ordering expands selectively through leaders

Sustainability partnerships scale as circular economy initiatives deepen

### COMPETITIVE LANDSCAPE

Autogrill strengthens leadership through travel expansion and health-led initiatives

Sarni outperforms in 2025 on expansion, modernisation and zero-waste positioning

Chef Express raises menu value through premium collaborations and recipe development

### CATEGORY DATA

Table 1 - Self-Service Cafeterias: Units/Outlets 2020-2025

Table 2 - Sales in Self-Service Cafeterias: Number of Transactions 2020-2025

Table 3 - Sales in Self-Service Cafeterias: Foodservice Value 2020-2025

Table 4 - Sales in Self-Service Cafeterias: % Units/Outlets Growth 2020-2025

Table 5 - Sales in Self-Service Cafeterias: % Transaction Growth 2020-2025

Table 6 - Sales in Self-Service Cafeterias: % Foodservice Value Growth 2020-2025

Table 7 - GBO Company Shares in Chained Self-Service Cafeterias: % Foodservice Value 2021-2025

Table 8 - GBN Brand Shares in Chained Self-Service Cafeterias: % Foodservice Value 2022-2025

Table 9 - Forecast Self-Service Cafeterias: Units/Outlets 2025-2030

Table 10 - Forecast Sales in Self-Service Cafeterias: Number of Transactions 2025-2030

Table 11 - Forecast Sales in Self-Service Cafeterias: Foodservice Value 2025-2030

Table 12 - Forecast Self-Service Cafeterias: % Units/Outlets Growth 2025-2030

Table 13 - Forecast Sales in Self-Service Cafeterias: % Transaction Growth 2025-2030

Table 14 - Forecast Sales in Self-Service Cafeterias: % Foodservice Value Growth 2025-2030

### DISCLAIMER

## Consumer Foodservice in Italy - Industry Overview

### EXECUTIVE SUMMARY

Demand pressure reshapes channel mix, favouring value-led formats

### KEY DATA FINDINGS

### INDUSTRY PERFORMANCE

Limited-service restaurants gain momentum, full-service restaurants lose footfall

Fulfilment diverges by channel as online ordering expands

Loyalty schemes and convenience-led offers gain traction

### WHAT'S NEXT?

Trading down remains structural feature, keeping limited-service restaurants in focus

Dark kitchens will become more industrialised, strengthening delivery-led supply

Sustainability and technology adoption to accelerate, with chains moving first

## COMPETITIVE LANDSCAPE

McDonald's stays ahead, while Autogrill expands through travel hubs and hybrid concepts

Multinationals benefit from widening networks

Technology becomes clearer differentiator as chains invest more heavily

## CHANNELS

Independents remain dominant in outlet terms, with chains gaining share through scale and execution

Delivery-led models grow in relevance, while hybrid formats broaden location strategies

## MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025

Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025

Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025

Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025

Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025

Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025

Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025

Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025

Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025

Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025

Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025

Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030

Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

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## SOURCES

Summary 1 - Research Sources

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