



Euromonitor
International

Consumer Foodservice in Italy

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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

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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

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INDUSTRY PERFORMANCE

Demand stays subdued as younger consumers shift away from espresso-led routines

Independent contraction accelerates, but renewal begins to improve offer quality
Health and wellness trends drive momentum, while platform presence grows from a low base

WHAT'S NEXT?

Traditional cafés and bars/pubs face further struggles, with dynamism anticipated for specialist formats
Eat-in will remain dominant, while online ordering becomes more important in growth segments
Sustainability and health cues to shape innovation, including inclusion-led initiatives

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

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Sustainability and wellbeing move closer to core proposition

WHAT'S NEXT?

Pizza-led chains to gain further ground as overall category remains under pressure
Experience will become more decisive, with retail collaborations and high-profile concepts gaining visibility
Innovation to remain central, spanning payments, hybrid formats and concept experimentation

COMPETITIVE LANDSCAPE

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Limited-Service Restaurants in Italy

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INDUSTRY PERFORMANCE

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Fulfilment shifts reinforce online growth

Chained operators widen the gap through innovation and health cues

WHAT'S NEXT?

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Online delivery to rise as digital ordering becomes more widespread

Dark kitchens will shift from experimentation to standardised supply

COMPETITIVE LANDSCAPE

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INDUSTRY PERFORMANCE

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Sustainability becomes a stronger point of differentiation

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

WHAT'S NEXT?

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KEY DATA FINDINGS

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INDUSTRY PERFORMANCE

Budget pressure and convenience lift 2025 performance

Chained expansion reshapes the channel, while online takeaway remains limited

Multi-channel execution expands among leaders, signalling a gradual shift

WHAT'S NEXT?

Street stalls/kiosks as affordable eating-out substitute

Online takeaway and delivery are likely to gain relevance as competition intensifies

Communication investment to become more decisive within increasingly crowded channel

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[Consumer Foodservice By Location in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Travel and retail lift performance, standalone remains uneven

INDUSTRY PERFORMANCE

Retail and travel drive growth with tourism recovery strengthening location-based demand

Standalone grows modestly on price effects, but independents remain exposed

Eat-in as core mission amid persist expansion for online delivery

WHAT'S NEXT?

Travel locations will lead, with retail staying positive and standalone under pressure

Digital innovation set to deepen across locations, led by travel hubs

Lodging and demographics keep demand uneven, but upscale urban concepts continue to expand

COMPETITIVE LANDSCAPE

Autogrill consolidates travel leadership through hybrid formats and airport partnerships

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