



Full-Service Restaurants in Italy

March 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Experience-led dining holds up but budgets keep full-service under strain

INDUSTRY PERFORMANCE

Footfall declines under purchasing power pressure
Pizza-led full-service restaurants outperforms as chains expand and adoption of delivery accelerates
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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Oniverse and Fragesa rise as Fradiavolo sharpens delivery and digital engagement
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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

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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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