



Euromonitor
International

Self-Service Cafeterias in Italy

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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

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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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