



Street Stalls/Kiosks in Italy

March 2026

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Street Stalls/Kiosks in Italy - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Street stalls/kiosks gains relevance as budgets tighten and on-the-go occasions expand

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

COMPETITIVE LANDSCAPE

Sushi Daily scales aggressively and strengthens omnichannel execution

Bobble Bobble accelerates as bubble tea becomes mainstream

Independents remain the majority, with food trucks driving experiential growth

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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

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

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