



**Euromonitor
International**

Consumer Foodservice By Location in Italy

March 2026

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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

McDonald's retains standalone scale while chef-led concepts gain visibility

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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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