



Euromonitor
International

Cafés/Bars in Italy

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Health-led niches gain share as traditional cafés/bars come under pressure

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

Autogrill strengthens leadership in travel-led cafés/bars

Starbucks expands rapidly and deepens experience-led positioning

Independent operators lose share as competition intensifies, while Lowengrube scales gradually

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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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