



Euromonitor
International

Limited-Service Restaurants in Italy

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2025 DEVELOPMENTS

Value-led formats gain ground as delivery and digitisation deepen

INDUSTRY PERFORMANCE

Trading down and convenience lift performance

Fulfilment shifts reinforce online growth

Chained operators widen the gap through innovation and health cues

WHAT'S NEXT?

Limited-service restaurants will remain resilient amid persistent budget pressures

Online delivery to rise as digital ordering becomes more widespread

Dark kitchens will shift from experimentation to standardised supply

COMPETITIVE LANDSCAPE

McDonald's holds leadership, while premium specialists expand into new locations

KFC and Rom'antica stand out on expansion and concept execution

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Consumer Foodservice in Italy - Industry Overview

EXECUTIVE SUMMARY

Demand pressure reshapes channel mix, favouring value-led formats

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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

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Delivery-led models grow in relevance, while hybrid formats broaden location strategies

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