

Italy Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Italy Foodservice Market size is estimated at USD 105.17 billion in 2024, and is expected to reach USD 136.38 billion by 2029, growing at a CAGR of 5.33% during the forecast period (2024-2029).

Rising tourism and expansion in commercial real estate propelling sales in the country

- The Italian foodservice market represented a share of 13.67%, by value, of the total foodservice market in Europe in 2022. The Italian market grew by CAGR of 1.65% in value from 2017 to 2022. The market is being driven by the full-service restaurants and cafes & bars sub-segments, which depend on developing tourism and commercial real estate in the country.
- Full-service restaurants dominate the Italian market. By cuisine, the segment mainly consists of European restaurants, followed by Asian and North American restaurants. Since European restaurants, mostly Italian cuisine, hold a majority share in the market, a good indicator to understand the development of the FSR market in Italy is the production and consumption of Italian specialty cheese in the country. Italian PDO cheese is used in a majority of dishes in authentic Italian cuisine. There are 42 varieties of PDO cheeses (Protected Designation of Origin) in Italy, and their production volume reached 596.67 metric tons in 2021, an 11.1% growth from the volume produced in 2016. The per capita consumption of cheese in Italy fluctuated between 22 and 23 kilograms in the past decade.
- The cafes & bars sub-segment is expected to see major progress and is anticipated to register a CAGR of 4.51%, by value, during the forecast period. The Italian market is driven by the consumption of beverages like coffee, alcoholic drinks, and desserts. Italian bars mostly feature cocktails as well as a wide range of liqueurs. Italy has many popular names in the liqueur category, which include Amaro Fernet Branca, Amaretto di Saronno, Campari, Grappa Nardini, Limoncello, and Sambuca Molinari.

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Italy Foodservice Market Trends

Bars & pubs dominate foodservice landscape in Italy, with Lombardy having the highest percentage of outlets

- The number of quick service restaurant outlets in Italy experienced a decline by 4.90% from 2019 to 2020, primarily attributed to the operational restrictions imposed by the pandemic. Popular dishes like pizza, pasta, noodles, burgers, and sushi dominate the Italian market, with fast-food brands specializing in these items accounting for a significant presence. Pizza, in particular, holds a substantial share of the Italian restaurant landscape, with approximately 40,000 restaurants (including both QSR and FSR) in the country offering various kinds of pizza. Bar pizzerias accounted for 36,300 of these establishments in 2022.

- Cafes & bars had the highest number of outlets among all foodservice types in 2022. Bars and pubs constituted over 74% of the outlets, while cafes represented nearly 25%. Lombardy, located in northern Italy and home to Milan, had the highest share of bars in the country at 17.21%. The region is renowned for its vibrant nightlife and culinary scene. Lazio, including Rome, ranked second with 10.53% of the bars, followed by Emilia-Romagna (9.19%), Campania (8.9%), and Veneto (8.55%). These regions are also known for their rich cultural and culinary traditions. Cafes and specialty coffee shops also play a significant role in the Italian market. In 2022, Italy had approximately 64,200 cafes and 560 specialty coffee shops. Cloud kitchens are projected to record a CAGR of 1.23% in terms of the number of outlets during the forecast period. Currently, cloud kitchens represent only 0.11% of the total number of foodservice outlets in Italy. However, with the growing online delivery market, the number of cloud kitchens is expected to increase significantly in the future.

Demand for FSR in Italy expected to increase due to tourism and innovative menus

- In Italy, cloud kitchens experienced a rise in average order value in 2022 compared to other foodservice types, with an average price of USD 12.41. In 2019, food delivery service was the leading sector in the Italian digital market. Milan ranks as the city where people most frequently order food online for home delivery, followed by Rome and Turin. The average order value for cloud kitchens increased by approximately 8.83% from 2020 to 2022, attributed to the strong presence of meal delivery apps such as Just Eat, Deliveroo, Glovo, and Getri, which significantly scaled the cloud kitchen model. For instance, Deliveroo recorded 2 million downloads in 2021, while Just Eat had around 1.7 million downloads in the same year.

- The demand for full-service restaurants (FSR) in Italy is expected to rise due to the growing number of tourists who are eager to explore the local cuisine. Professionally trained chefs in FSR establishments offer innovative menus, international cuisine, and proprietary recipes to cater to the preferences of both tourists and health-conscious individuals. In 2022, popular dishes offered in the country included Spaghetti alla Carbonara and Risotto, priced at USD 9.5 and USD 13 per 300 g, respectively. As Italian consumers' appetites for local cuisine continue to grow, the average order value for FSR remains high at USD 23.63. The quick service restaurant (QSR) segment in Italy has experienced significant growth in average order value in recent years. From 2019 to 2022, QSR recorded an average order value growth of 8.55% in the country. Fast-food restaurants in Italy are known for offering convenience, speed, and familiar handheld menu items such as burgers, fries, and wraps. The most popular fast-food dishes in Italy, including pizza and pasta, were priced at USD 8.6 and USD 8.5 per serving, respectively, in 2022.

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Italy Foodservice Industry Overview

The Italy Foodservice Market is fragmented, with the top five companies occupying 2.82%. The major players in this market are Autogrill SpA, Compagna Generale Ristorazione SpA, Cremonini SpA, La Piadineria Group and McDonald's Corporation (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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