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SUSTAINABLE DEVELOPMENT AND CHANGES IN CONSUMER BEHAVIOR IN THE ITALIAN FOOD SERVICE MARKET

The foodservice market in Italy occupies an important place in the structure of the national economy, as it combines a gastronomic tradition, a high level of consumer culture and the dynamic development of tourism. The total volume of the out-of-home foodservice market was around €99 billion in 2023, which corresponds to approximately 35% of the total expenditure of Italians on food. The market continues to develop, although it remains extremely fragmented – over 80% of enterprises are independent restaurants, cafes or small family establishments. In 2024, the sector reached €83 billion, which is 2% more than the year before [1]. Despite the positive dynamics, the industry faces a number of challenges – rising energy and raw material prices, staff shortages and changing consumer expectations.

In recent years, the concept of «sustainable development» has transformed from a marketing slogan into a real indicator of competitiveness. Italian food service operators are increasingly implementing zero-waste kitchen practices, reducing food waste, reusing resources and labelling the origin of products [2]. Such measures not

only allow for cost optimization, but also build trust with customers who value transparency and responsibility. The sustainable catering segment is showing steady growth thanks to the companies' transition to local and organic ingredients, the use of eco-friendly packaging and the reduction of food waste [3]. This trend not only complies with the EU's policy on the «green» economy, but also creates a positive image of companies among consumers.

Growing interest in organic production: the number of certified organic farms in Italy increased by more than 12% in 2020–2022 [4]. This indicates a systemic reorientation of the agricultural sector, which provides a raw material base for sustainable restaurant business.

A tangible factor in the development of the industry is the evolution of consumer habits. Italian customers are increasingly choosing establishments that comply with the principles of environmental responsibility. According to [1], 65% of consumers are willing to pay more for sustainable products and services, and more than 70% pay attention to the origin of ingredients and the availability of eco-packaging. Plant-based menus, zero-waste cafes and restaurants with local suppliers are gaining popularity among young people, especially in large cities: Milan, Rome, Bologna.

However, the survey results show that economic instability and high inflation are affecting purchasing behavior: 55% of Italians said they plan to reduce spending on restaurant services [5]. Thus, two opposing trends are simultaneously operating in the market: growing environmental awareness and cautious consumption. This forces operators to look for new ways to combine affordability and sustainability through flexible pricing, seasonal menus or partnerships with local farmers.

According to Mordor Intelligence, the total volume of the Italian food service market could grow from 109.4 billion USD in 2025 to 175.1 billion USD by 2030, which corresponds to a compound annual growth rate (CAGR) of about 9.9%. The main drivers are tourism, digitalization of services and demand for conscious consumption. The sustainable catering segment is considered one of the most promising: demand for eco-services among corporate and public customers is growing twice as fast as the market average [3].

In 2024, the quick-service restaurants (QSR) segment and food delivery via mobile applications developed rapidly. Innovative models based on cloud-kitchen and dark stores allow to reduce costs and at the same time reduce food waste, which is consistent with the principles of sustainable development [1]. Thus, the combination of digital solutions with environmental principles is becoming a new vector of competition in the Italian HoReCa.

Despite positive trends, the industry faces a number of structural problems. First of all, it is the high fragmentation of the market, which complicates the mass implementation of sustainable technologies due to the lack of investment in small establishments. In addition, the lack of qualified personnel remains one of the main barriers to development, especially in regions with active tourism. Also noticeable is the increase in operating costs – energy, rent, raw materials which reduces the profitability of small restaurant enterprises. According to Deloitte, in 2024 the average margin level in HoReCa decreased by 1.3 pp. compared to 2022.

For food service enterprises, it is advisable to integrate sustainability principles at all stages of the value chain – from the purchase of raw materials to waste disposal. It is important not to limit yourself to «green» branding, but to move to a comprehensive model of resource and energy management. Digitalization (online ordering, contactless payments, consumer data analytics) should become a tool for increasing efficiency and reducing environmental impact. Particular attention should be paid to education and training of personnel so that a sustainable approach becomes part of the corporate culture.

At the macro level, it is worth developing state programs to support small HoReCa operators in the implementation of environmental technologies and digital innovations. The role of associations of restaurateurs and institutions of sustainable tourism is growing, which can facilitate the exchange of experience and the dissemination of best practices.

Thus, sustainable development is becoming a systemic factor for the Italian food service market. Changes in consumer behavior: the desire for environmentally friendly products, responsible production and transparency of supply are shaping a new market

reality. The development of the sector depends on the ability of enterprises to combine Italy's traditional gastronomic heritage with innovation and sustainable practices. The success of the future of Italian HoReCa will be determined by those who can transform sustainable development from a prerequisite to a strategic advantage.

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