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Italian Restaurant Spending Fell in Real Terms in September

Visits edged up 0.3%, yet spending rose only 1.7%, trailing 2.9% price growth as delivery and late-night demand weakened

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Italian restaurant spending lost ground in real terms in September even as customer traffic held nearly steady, according to data released on Monday, November 2, by FIPE-Confcommercio, the federation that represents public establishments.

FIPE’s price and consumption observatory said visits to restaurants and other food service venues rose 0.3% from September 2025, while spending at current prices increased 1.7%. That gain, however, was lower than the 2.9% annual rise in restaurant service prices, meaning consumers spent less in real terms after adjusting for inflation.

The figures point to a market that is still attracting customers but is struggling to turn that traffic into real growth in spending. FIPE also said the average receipt increased 1.0% from a year earlier, again below the pace of price increases in the sector.

The September data showed different patterns depending on the time of day. Lunch posted a 3.3% increase in visits and a 3.5% rise in spending. Dinner also improved, with visits up 2.0% and spending up 1.4%. The evening aperitif was one of the strongest segments, with visits up 3.4% and spending up 7.9%.

Other occasions weakened. Afternoon consumption fell 5.2% in visits and 1.3% in spending. After-dinner and late-night consumption declined 2.3% in visits and 10.4% in spending, suggesting a sharper retreat in one of the dayparts that had often supported discretionary purchases.

By sales channel, traditional restaurants and bars both recorded gains. Restaurant visits rose 3.6% and spending increased 4.3%. Bars posted a 2.5% increase in visits and a 2.0% rise in spending. Canteens also grew, with visits up 5.4% and spending up 6.2%, while gelato shops recorded some of the strongest gains, with visits up 14.4% and spending up 11.9%.

Delivery and takeout continued to contract. FIPE said food delivery visits dropped 7.0% and spending fell 14.6%. Takeout outlets posted a 6.1% decline in visits and a 1.9% decrease in spending.

For drinks suppliers, the shift matters because bars, aperitif occasions and sit-down meals are key points of sale for wine, beer, spirits and coffee. Stronger spending during the evening aperitif could support demand for cocktails, sparkling wine and beer, while weaker after-dinner traffic could weigh on late-night beverage sales. The drop in delivery and takeout may also affect channels where soft drinks and packaged alcoholic beverages often travel with food orders.

On prices, FIPE said inflation in restaurant services eased to 2.9% in September from 3.2% in August. That rate remained well below Italy’s overall inflation rate of 4.2%, which the federation said was driven by energy costs.

Within the sector, prices at bars rose 3.2% from a year earlier. Prices increased 4.4% in pastry and gelato outlets and 2.8% in coffee service. Traditional restaurant prices were up 2.6%, pizzeria prices rose 3.0%, and canteen prices increased 2.1%.

The September figures suggest Italian consumers are still going out, but they are doing so with more restraint in parts of the market. FIPE’s data show that businesses tied to meals and aperitif occasions fared better than those dependent on afternoon snacking, late-night traffic, delivery or takeout, even as price increases across the sector continued to outpace the growth in spending.