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Italy's bars struggle to survive on €4.20 average tabs

A new industry analysis found 21,741 closures or service changes since 2015, driven by rising costs and cheap espresso

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Italian bars remain one of the country’s most common public gathering places, drawing more than 16 million visits a day, but the business model behind them is under growing strain, according to a new analysis from Fipe-Confcommercio, Italy’s federation of public establishments.

The findings, presented at the first Forum of the Italian Bar at Rome’s Palazzo delle Esposizioni, portray the bar as both a social institution and a business operating on thin margins. In Italy, the word bar usually refers not only to a place for alcohol, but to an all-day neighborhood cafe where customers stop for espresso, breakfast, snacks and aperitifs.

Fipe-Confcommercio said Italy had 124,917 bar businesses in 2025, down 1.5% from 2024. Together they generated more than 5 billion consumption occasions a year, equal to about 16 million visits a day, with an estimated value of €23 billion. The sector supports 374,000 workers overall, while the number of employees rose 6.4% to 276,730 in 2024.

Even with that scale, the association said the economics of the business are becoming harder to sustain. Since 2015, 21,741 businesses have either closed or changed the type of service they offer. Fipe-Confcommercio said the sector depends on a fragile balance, with operators often serving an average of 120 customers a day and remaining open as long as 14 hours a day, seven days a week, while the average ticket is just €4.20. Breakfast spending averages €2.90.

Price pressures have added to the strain. The association said prices in the sector rose by about 3% in 2026, with coffee bar prices up 2.8% in September. The average price of an espresso reached €1.28.

The forum in Rome was framed as an attempt to address both the sector’s economic sustainability and its social role. Fipe-Confcommercio President Lino Enrico Stoppani and illycaffè Chairman Andrea Illy led the initiative, which was attended by Agriculture Minister Francesco Lollobrigida. The organizers said the goal was to bring together the supply chain and discuss ways to protect a business model that remains central to daily life in Italy.

A separate survey commissioned by Fipe-Confcommercio and carried out by SWG found that bars still hold a strong place in Italian habits. Based on a representative sample of more than 2,500 adults, the survey found that 72% of Italians visit a bar at least once a week, 26% go every day and 67% of those who go to bars say they have a regular place they trust.

The survey also pointed to the bar’s role beyond food and drink. About 33% of respondents said that having a bar open late in outlying neighborhoods increases the sense of safety in those areas. Fipe-Confcommercio said that result reflects the bar’s function as a local presence in places where other commercial activity has faded.

At the same time, the research found signs of change in how Italians see the bar. While 56% said there is still a distinctly Italian way of living the bar experience, 32% said that identity has weakened or disappeared. Differences between age groups were clear. Among Gen Z respondents, 22% said the bar is the place where they most often spend time with loved ones, compared with 9% of Baby Boomers.

The study also suggested that customers are placing greater weight on visible standards. Cleanliness, care, service and hospitality ranked among the most important factors in choosing a bar, and 71% of Italians said they would be influenced by a certification based on those criteria.

In response, the association launched what it called the New Etiquette of the Italian Bar, a project built around six ideas that it said should define the sector’s identity: quality, relationships, refreshment, design, decorum and sentiment. Fipe-Confcommercio presented the initiative as a way to update the image of the Italian bar without relying on nostalgia, and as a response to what it described as growing retail desertification in many neighborhoods.

Stoppani said the Italian bar remains a unique economic and social model that combines enterprise, work, service and community, but he warned that it is also a sector in deep transition, with narrow margins and a labor-intensive organization. Behind a cup of coffee, an aperitif or a breakfast order, he said, are businesses, workers and skills, as well as a distinctly Italian way of using public space and building relationships.

Illy said coffee and cappuccino consumed at the bar still account for nearly 50% of all bar consumption across generations. But he added that the average price of an espresso in Italy remains among the lowest in the world, leaving very limited returns for operators. The future of the sector, he said, will require a strategy based more on value than volume, with better training, investment in premises and closer cooperation

among industry, hospitality businesses and public institutions.

The figures released in Rome show a sector that continues to reach millions of people every day and remains deeply woven into Italian routines, even as rising costs, long hours and modest spending per visit put increasing pressure on the businesses that keep that system running.