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Italian restaurants charging over 35 euros gained customers in the first half of 2026

TradeLab found visits to those venues rose 3.2% after the wider sector slipped 0.6%, increasing pressure on midpriced and budget operators

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Italy’s restaurant market shrank in the first half of 2026, but higher-end venues moved in the opposite direction, widening the gap between upscale dining and the rest of the sector and increasing pressure on midpriced and budget operators.

According to TradeLab’s Away from Home consumer tracking data, reported by Ristoranti Web on Saturday, November 21, restaurants with an average check above 35 euros posted a 3.2% increase in customer visits in the first six months of 2026. Over the same period, the restaurant market as a whole recorded a 0.6% decline.

TradeLab said the strongest performance came from the upper end of the market. Angela Borghi, TradeLab’s head of commercial activity for the away-from-home division, told Ristoranti Web that midrange and lower-priced restaurants lost between 2% and 3% of visits, while pizzerias closed the half with a modest 0.6% gain. The figures point to a market in which consumers are not cutting back evenly across formats. Instead, traffic is concentrating more heavily in venues that can sustain higher average spending.

The data suggests that this matters most for operators that rely on volume rather than premium pricing. A drop of 2% to 3% in visits can weigh directly on sales for midmarket and budget restaurants, especially if they have less room to raise prices or protect margins. By contrast, restaurants already positioned above 35 euros per check are drawing more traffic even as the broader market contracts.

TradeLab’s figures, as cited by Ristoranti Web, also show that the higher-end segment improved on its performance in 2025. That year, visits to upscale restaurants rose 2% from the previous year, compared with a 0.6% increase for the restaurant market overall. TradeLab said dinner visits at upscale restaurants rose even faster in 2025, at 2.8%, underscoring the importance of the evening meal for that part of the industry.

Dinner remained central in the first half of 2026 as well. Ristoranti Web said the growth in upscale restaurant visits was driven by dinner, which TradeLab described as the most important eating occasion for business and also the one showing the strongest growth rates. Dinner accounted for 52% of total visits in the segment. TradeLab’s tracking also found that about 23% of all restaurant dinner visits were concentrated in venues with average checks above 35 euros, and that those restaurants generated

29.7% of dinner revenue.

The geographic split in those visits shows that the South held the largest share, at 33% of the total for higher-end restaurants. Even so, that was 5 percentage points below the South’s share of visits in the broader restaurant market, suggesting that upscale dining is relatively less concentrated there than restaurant traffic overall. The Northwest followed with 26% of visits, which was 3 points above its share in the overall market. Central Italy and the Northeast were close to each other, at 21% and 20%.

TradeLab’s demographic breakdown indicates that customers ages 45 to 54 were the core audience for dinner at restaurants with checks above 35 euros, accounting for 24% of total visits. They were followed by diners ages 55 to 64, at 19%, and those ages 35 to 44, at 18%. The gender split showed a higher share of male customers, who represented 55% of the total after increasing 6.7% in 2025, according to the data cited by Ristoranti Web.

The report also offered a view of what diners ordered at dinner in this segment. Main courses were ordered slightly more often than first courses and appetizers, while desserts trailed behind. First courses recorded the strongest growth, with orders up 13% from the previous year, a sign that even in a part of the market defined by higher spending, customer choices within the meal continue to shift.