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# Spain’s restaurant sales rose 2.4% despite a slight drop in customer visits

Revenue reached 45.9 billion euros after the average check climbed 2.5%, putting Spain ahead of Britain, Germany and Italy

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Spain’s restaurant industry increased sales by 2.4% over the 12 months through August 2026, reaching 45.9 billion euros, even as customer visits edged down 0.1%, according to data from Circana and KPMG for the Marcas de Restauración industry

group that were presented in Madrid on Tuesday, November 24. For hospitality businesses, the figures show that revenue growth is being sustained by higher spending per diner rather than by a larger flow of customers.

The same data show that the average check rose 2.5% in the period, helping offset the small decline in traffic. That pattern has become a central feature of the Spanish market as consumers remain cautious about discretionary spending and operators face a tougher environment for attracting repeat visits.

Edurne Uranga, Circana's vice president for foodservice in Europe, described the current setting as a gray period in which consumers are acting pragmatically and closely reviewing how they spend their budgets. The figures suggest that Spanish restaurant operators are still managing to raise sales, but they are doing so in a market where demand is fragile and where price sensitivity remains high.

Spain outpaced other major European markets in growth in restaurant spending, according to the report. Spending rose 1.8% in the United Kingdom, 1.6% in Germany and 1.2% in Italy, while France posted a 1.4% decline. That placed Spain at the top of the group on this measure, even though the gain was modest and was not supported by stronger traffic.

The pressure is not being felt evenly across the industry. Uranga said traditional restaurants recorded a 2.5% drop in visits. Specialized restaurants were broadly flat, while casual restaurants posted 0.7% growth in visits. Within quick-service formats, specialty outlets grew 1%, coffee and pastry businesses were essentially stable at 0.1%, and tapas-and-beer outlets slipped 0.4%.

The report also pointed to growth in channels outside the standard restaurant model. Uranga said restaurant offers inside supermarkets, known in Spain as mercaurantes, are still only 7% of restaurant consumption occasions but are gaining demand, along with vending machines and food consumption during travel. The shift suggests that convenience is taking a bigger role in where and how consumers spend.

For branded restaurant groups, the report showed sales of 10.874 billion euros, up 1.6%. Growth within that segment was uneven. According to Circana and KPMG, 45% of brands expanded by more than 2%, 5% remained stable, and the remaining 50% declined by more than 2%. Store expansion also differed sharply by performance. Brands that grew opened 2.7% more locations, stable brands increased their store base by 0.7%, and declining brands reduced openings by 5.7%.

Uranga said the brands that are growing tend to adapt better to different consumption occasions and changing customer preferences. The report said 43% of Spaniards say they follow a specific diet. That trend is visible in burger consumption, where about one-third of choices are linked to specific dietary needs. Gluten-free burger demand rose 11%, while halal burger demand increased 33%, according to the presentation.

The branded segment is also facing a sharper consumer reaction to prices. The report said 71% of consumers believe restaurant prices have risen more than expected, and that perception has contributed to a 1.9% decline in visits to branded restaurant operators. The finding helps explain why sales can keep rising while customer counts weaken, and why chains are under pressure to defend margins without pushing price increases so far that they reduce demand further.

Delivery remains another area under close watch. Uranga said she sees a great deal of movement ahead in home delivery in 2027 after the segment moved past an earlier inflection point tied to the implementation of Spain’s rider law. That suggests operators still view off-premise consumption as an area with room to develop, even if the market has already gone through an adjustment period.

The business outlook remains cautious despite the increase in overall sales. Enrique Porta, KPMG’s head of consumer business, said the sector’s performance has been better than many executives had expected, but uncertainty still dominates corporate planning. According to a KPMG study of 43 participating companies, 60% of executives expect customer traffic to decline in 2027.

The same survey found that 79% of respondents see inflation as the main threat to their business, followed by 56% who cited a loss of customer purchasing power and 49% who pointed to regulation and legal uncertainty. Labor issues are also a growing

concern. The survey said 91% of executives reported absenteeism problems, and 86% described absence rates as very high, up from 71% in the previous year.