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Italian Restaurants Favor Local Wines Despite Global Export Success

Regional loyalty shapes wine lists, limiting opportunities for small producers and challenging broader representation within Italy’s dining scene

Monday, March 16, 2026



Italian wine is a global success story, with exports exceeding €8 billion each year. This performance places Italy among the world's leading wine producers and exporters. Yet, inside Italian restaurants, the approach to wine is much more local. According to recent data from Trinko, an analysis firm focused on the HoReCa market, between 70% and 75% of the wines listed on restaurant menus come from the same region where the restaurant is located.

This situation highlights a paradox: while Italian wine has achieved international recognition and reach, its presence in domestic restaurants remains strongly tied to local origins. The preference for regional wines is rooted in cultural traditions. Italian cuisine is closely linked to its territory, and many restaurateurs aim for harmony between local dishes and local wines. Proximity to wineries also simplifies logistics and business relationships.

However, when regional identity becomes the main or only criterion for selecting wines, it can create barriers within the industry. For many small and medium-sized wineries, gaining access to restaurant wine lists outside their home region remains a significant challenge. The system risks turning a source of pride into an obstacle for broader representation.

The restaurant sector plays a crucial role in Italy's wine market. The HoReCa channel accounts for about 55-60% of the domestic wine market's value, even though it handles lower volumes than large-scale retail. The sector itself is highly fragmented, with hundreds of thousands of businesses including restaurants, bars, and hotels across the country. Only a fraction of these establishments offer a well-structured wine list. As a result, access to restaurant sales often depends more on distribution networks and personal relationships than on the quality of the wine itself.

Consumer habits are also influencing this landscape. According to Trinko's analysis, 19% of Italians have reduced how often they dine out. However, when they do go to restaurants, they are seeking higher quality experiences. Data shows that 66% prefer ordering a high-quality glass of wine rather than opting for a cheaper bottle. This trend is pushing many restaurateurs to rethink their wine offerings, investing more in by-the-glass service and curating their selections more carefully.

The central question remains whether Italian restaurants should serve as showcases for all Italian wines or focus mainly on those from their own region. So far, most have chosen the latter path. This choice underscores the paradox at the heart of Italian wine: it is celebrated around the world but still struggles to fully represent itself within its own borders.