

Austria plant-based food retail market insights

2020-2022



Executive Summary

Retail sales data from NielsenIQ covering 13 European countries shows that sales of plant-based foods have grown 6% in 2022 – and 21% since 2020 – to reach €5.8 billion.

The global shift towards plant-based diets has sparked a revolution in the food industry, with major food manufacturers and retailers embracing the change. In Europe, plant-based food retail sales have surged in recent years as new products and innovations have come to market, enabling more consumers to purchase next-generation plant-based meat, seafood, eggs and dairy that are competitive with animal products on taste, price and convenience.

Plant-based foods in Europe are a €5.8 billion market.

The Good Food Institute Europe analysed NielsenIQ plant-based data for 13 European countries – Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, and the UK – to calculate the size and growth of the plant-based food retail market from 2020 to 2022.

€5.8 billion

The retail market for plant-based foods is worth €5.8 billion, up from €4.8 billion in 2020.

+6%

The value of plant-based food sales grew by 6% between 2021 and 2022.

+4%

Plant-based food unit sales grew by 4% between 2021 and 2022.

21%

Plant-based food euro sales and unit sales grew by 21% between 2020 and 2022.

To contextualise the sales performance of plant-based categories in 2022, it is important to note the unique macroeconomic environment that was present due to the ongoing war in Ukraine, global trade tensions, and inflation. While the growth of the plant-based food retail market decelerated in 2022 compared to 2021, both euro and unit sales continued to grow, demonstrating strong demand from consumers for these products despite these challenges.

Overview of Europe-wide plant-based category euro sales summary, 2022

	2022 euro sales	2021-2022 sales growth	2020-2022 sales growth	2022 unit sales	2021-2022 unit sales growth	2020-2022 unit sales growth
Milk	€2.2 B	7%	19%	1.3 B	6%	20%
Meat	€2.0 B	3%	19%	846 M	1%	21%
Yoghurt	€515 M	-0.4%	8%	255 M	-3%	10%
Spreads	€247 M	13%	40%	140 M	4%	26%
Meals	€181 M	20%	79%	72 M	14%	71%
Ice cream	€174 M	8%	14%	57 M	8%	15%
Cheese	€165 M	4%	56%	61 M	4%	62%
Cream	€139 M	7%	7%	109 M	0%	1%
Dessert	€88 M	6%	27%	58 M	5%	40%
Seafood	€43 M	60%	326%	14 M	67%	343%
Total	€5.8 B	6%	21%	2.9 B	4%	21%

Plant-based foods in Austria are a €99.6 million market.

The Austrian plant-based food retail market is one of the smallest in Europe. However, sales data demonstrates that consumer demand is growing rapidly, as sales of plant-based foods grew by 22% between 2020 and 2022 to €99.6 million.

Plant-based milk is Austria's most developed category of plant-based products and experienced steady growth between 2020 and 2022. The value of plant-based meat sales continued to increase, growing 27% between 2020 and 2022. One of the least developed categories, but the fastest growing, is plant-based seafood.

Dive into the report to better understand the Austrian plant-based food retail market and how plant-based foods are growing in comparison to animal-based foods.

Addendum: In April 2023, we discovered some errors on the part of our data partner for the UK plant-based cheese, yoghurt, and dessert categories and the Poland plant-based cheese category. In this report, the executive summary, overall plant-based food country comparison charts, and plant-based yoghurt country comparison charts have been updated with the correct sales figures.

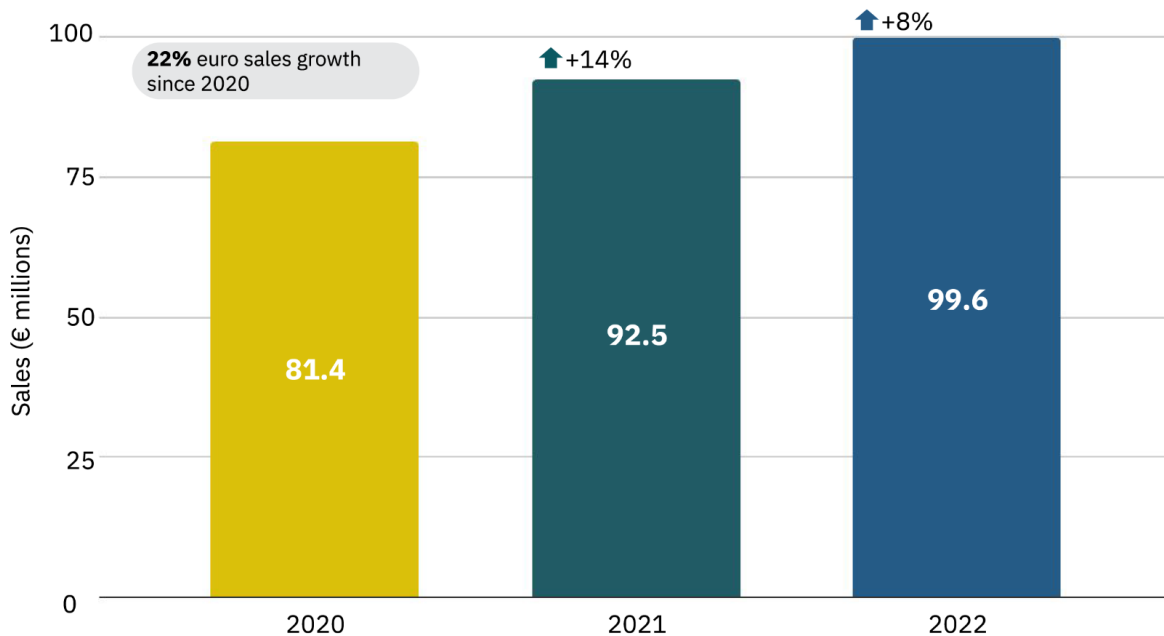
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Overall plant-based food market

Plant-based food sales in Austria grew by 8% in 2022 to reach €99.6 million.

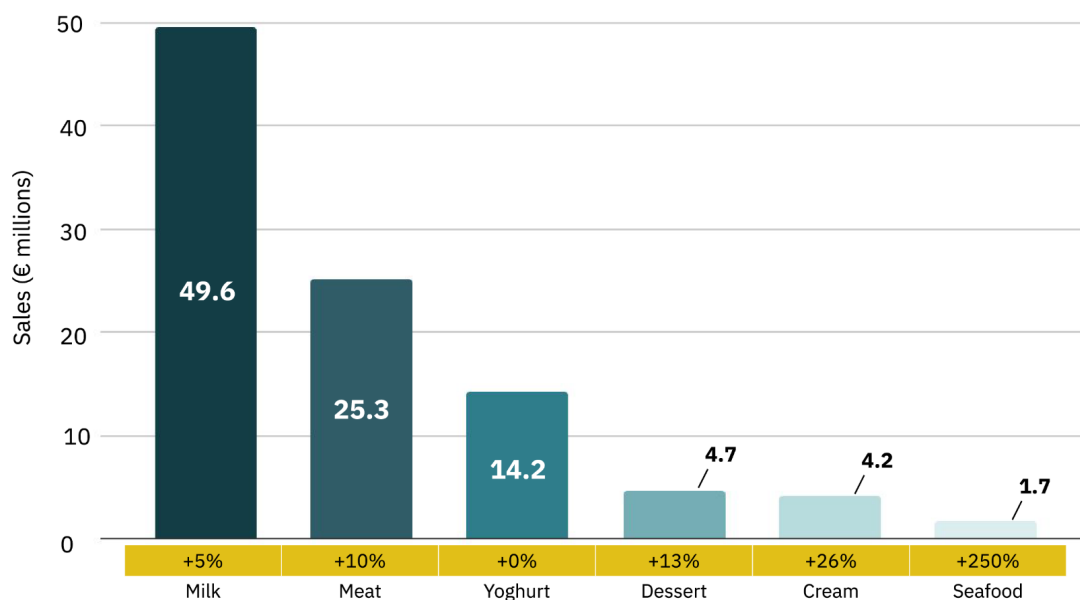
Austria plant-based foods sales (in € millions) 2022



Categories

Plant-based categories are in various stages of development.

Plant-based foods euro sales and euro sales growth by category (in millions), 2022



Key insights:

- **Plant-based milk is the most developed of all plant-based categories.**
Plant-based milk sales were €49.6 million in 2022, and the category continued to experience steady growth.
- **Plant-based meat sales continued to increase, totalling €25.3 million in 2022,** and growing 27% between 2020 and 2022.
- **One of the least developed categories, although the fastest growing, is plant-based seafood.** At €1.7 million in sales in 2022, plant-based seafood is still a small category but growing rapidly, with more than 1,327% growth since 2020.

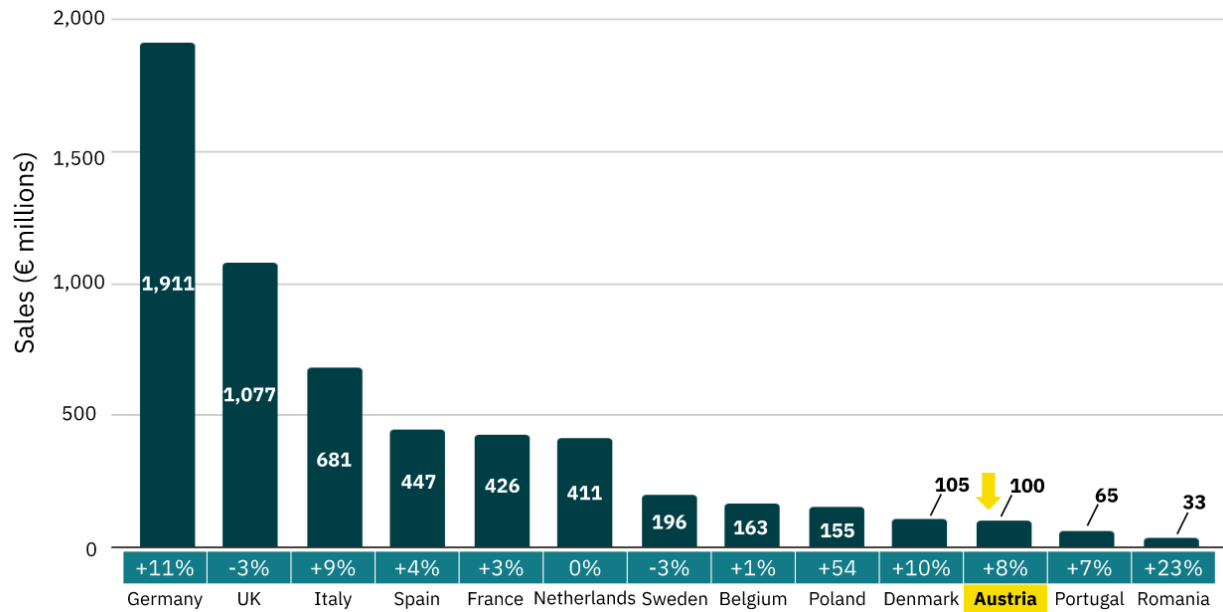
Plant-based category sales summary, 2022

	2022 euro sales	2021-2022 euro sales growth	2020-2022 euro sales growth	2022 unit sales	2021-2022 unit sales growth	2020-2022 unit sales growth
Milk	€49.6 M	5%	18%	25.0 M	4%	21%
Meat	€25.3 M	10%	27%	9.5 M	9%	26%
Yoghurt	€14.2 M	0%	6%	7.7 M	-2%	12%
Dessert	€4.7 M	13%	28%	2.3 M	4%	21%
Cream	€4.2 M	26%	79%	3.4 M	12%	59%
Seafood	€1.7 M	250%	1,327%	0.4 M	241%	1,078%
Total	€99.6 M	8%	22%	48.3 M	5%	24%

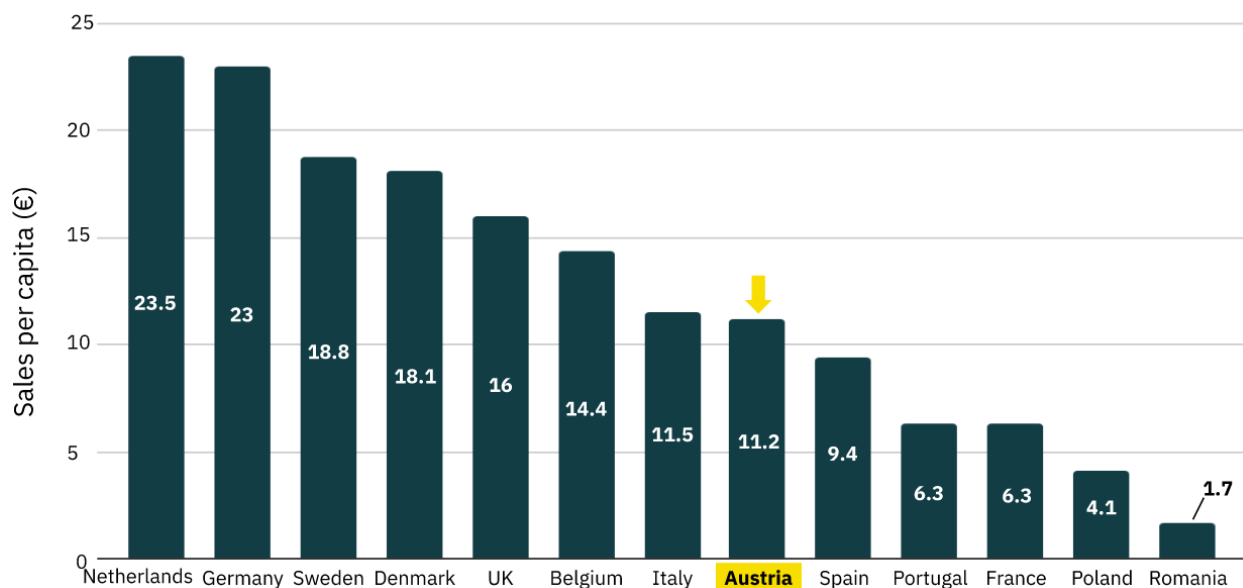
Country comparison

Austria comes 11th in terms of plant-based food sales value in Europe. However, in average plant-based food spend per capita, Austria ranks eighth.

Europe-wide plant-based food sales by country (in € millions), 2022

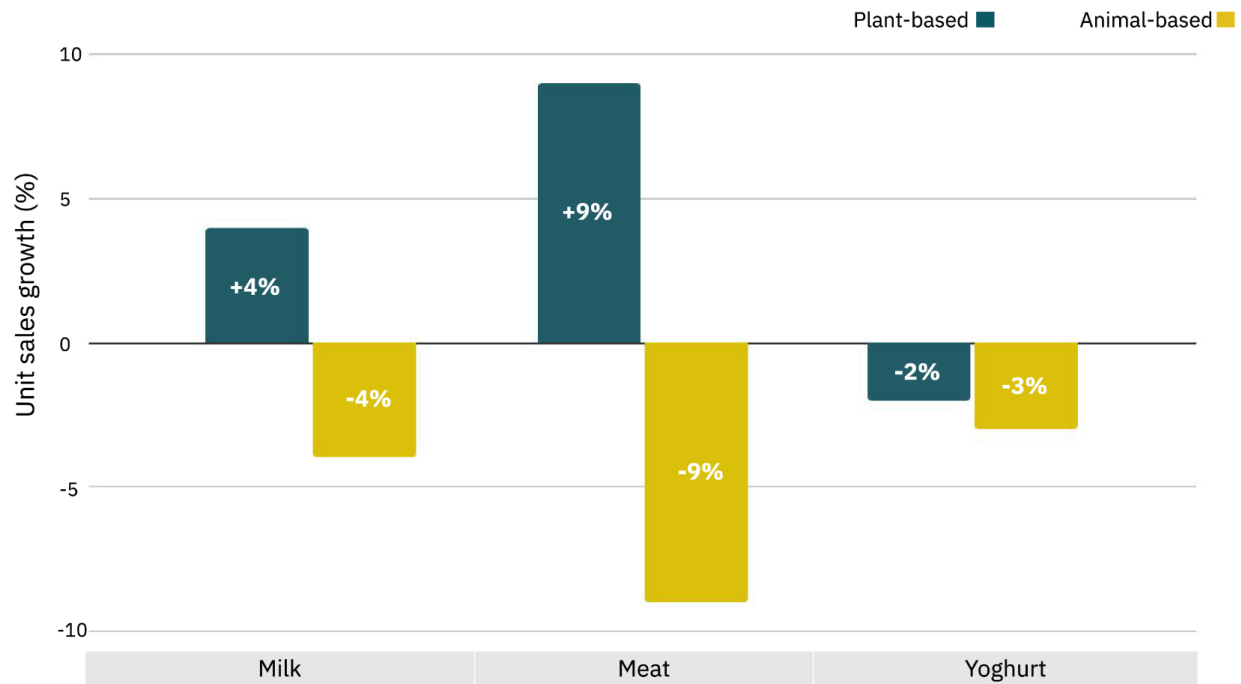


Europe-wide average plant-based food spend per country per capita (in euros), 2022



Comparison to animal-based foods

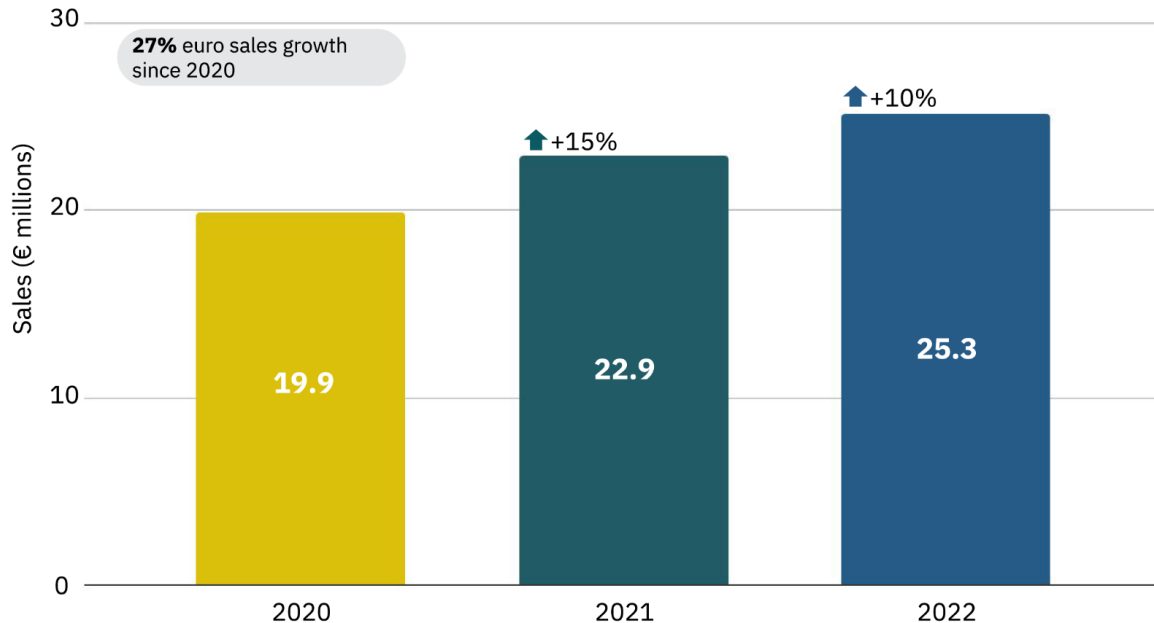
Plant-based vs animal-based category unit sales growth, 2022



To compare the growth of plant-based versus animal-based categories, we compared unit sales (instead of euro sales) as it provides a more direct comparison. In 2022, unit sales growth of the plant-based milk, meat and yoghurt categories outpaced that of animal-based categories in 2022.

Plant-based meat¹

Austria plant-based meat sales (in € millions), 2020-2022



Key insights:

- The value of plant-based meat sales grew 27% between 2020 and 2022, while total unit sales for plant-based meat went up 26%.
- In comparison, pre-packaged conventional meat unit sales decreased by 15% between 2020 and 2022.
- In terms of average price per unit, the plant-based meat category was less impacted by inflation and price increases in 2022. Plant-based meat prices increased by 1%, whereas pre-packaged conventional meat prices increased by 13%.

Segment insights:

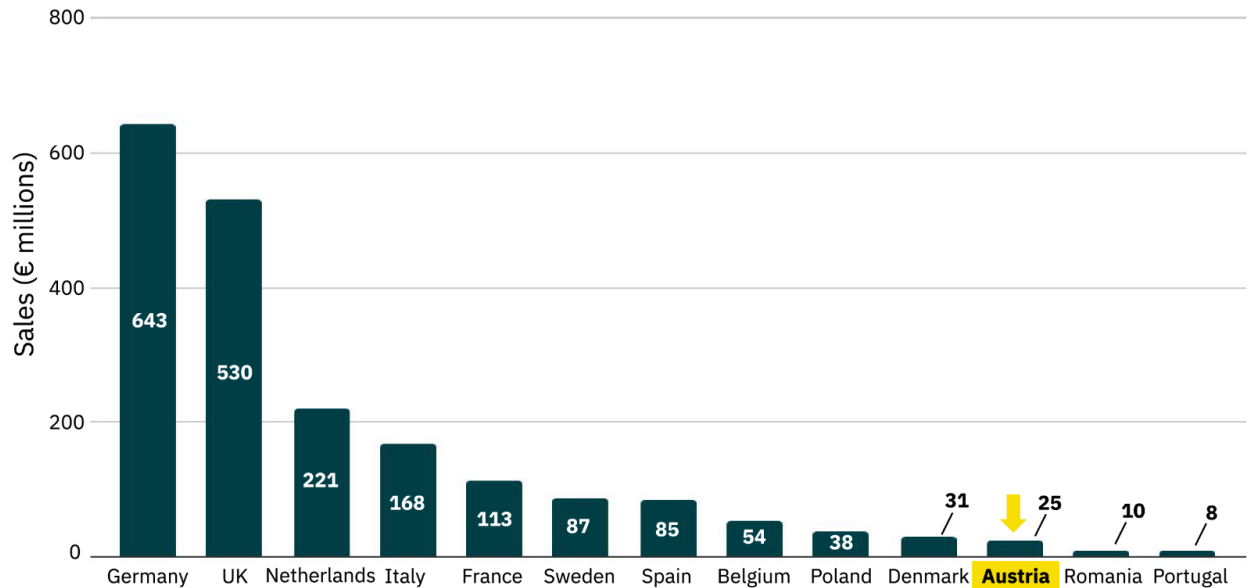
- The most popular plant-based meat formats are processed meat products (e.g. mince, nuggets, schnitzel), which make up 43% of sales by value, followed by cold cuts (19%), burgers (18%), sausages (13%) and the rest a mix of granules, flakes, dry mix (6%). Whereas most formats experienced growth in sales by value, sausages have declined since 2020.

¹ The plant-based meat category includes both analogues (products that mimic the appearance and taste of animal-based meat) and non-analogues (e.g. vegetable-based patties). It does not include tofu/seitan.

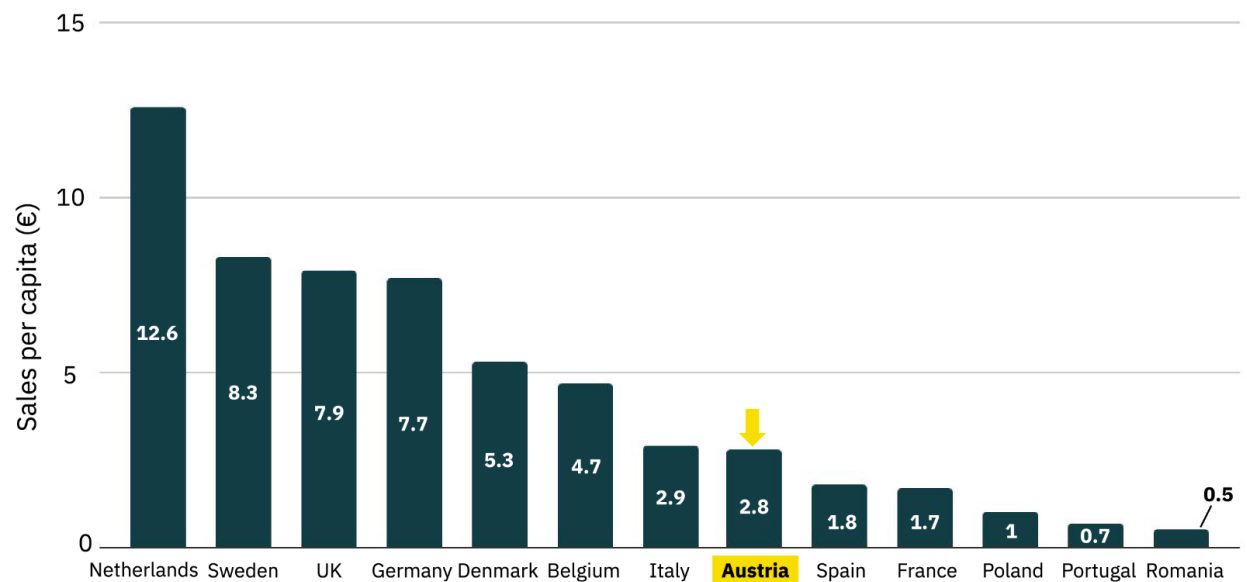
Country comparison

Austria ranks 11th in plant-based meat sales value in Europe and eighth in average plant-based meat spend per capita.

Europe-wide plant-based food sales by country (in € millions), 2022

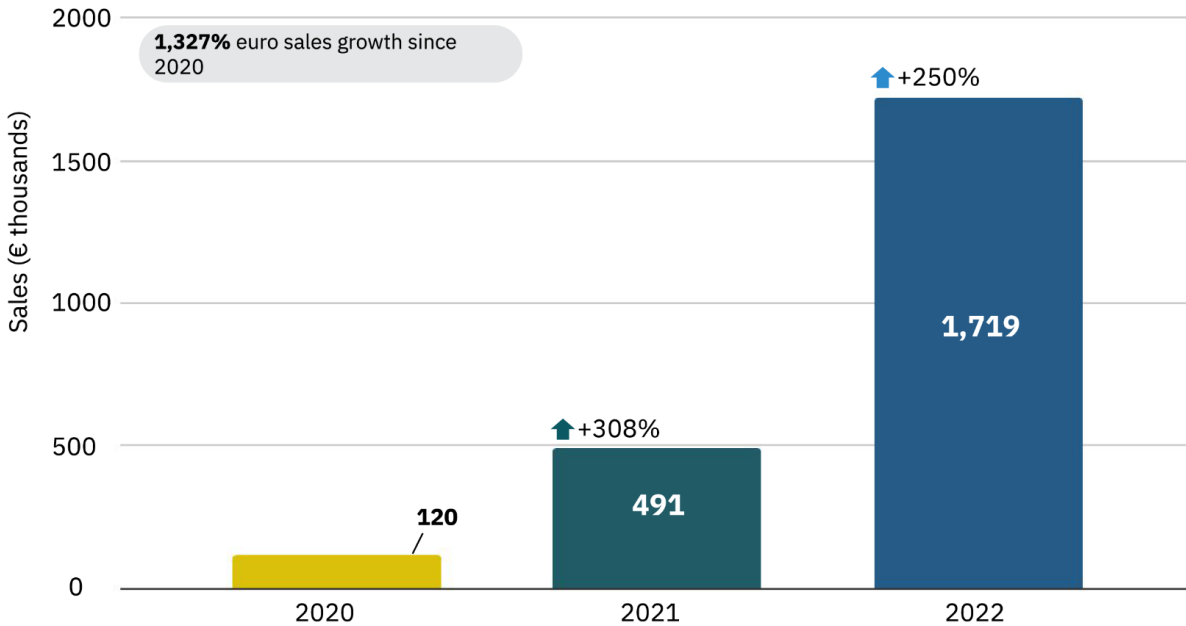


Europe-wide average plant-based food spend per country per capita (in euros), 2022



Plant-based seafood

Austria plant-based seafood sales (in € thousands), 2020-2022

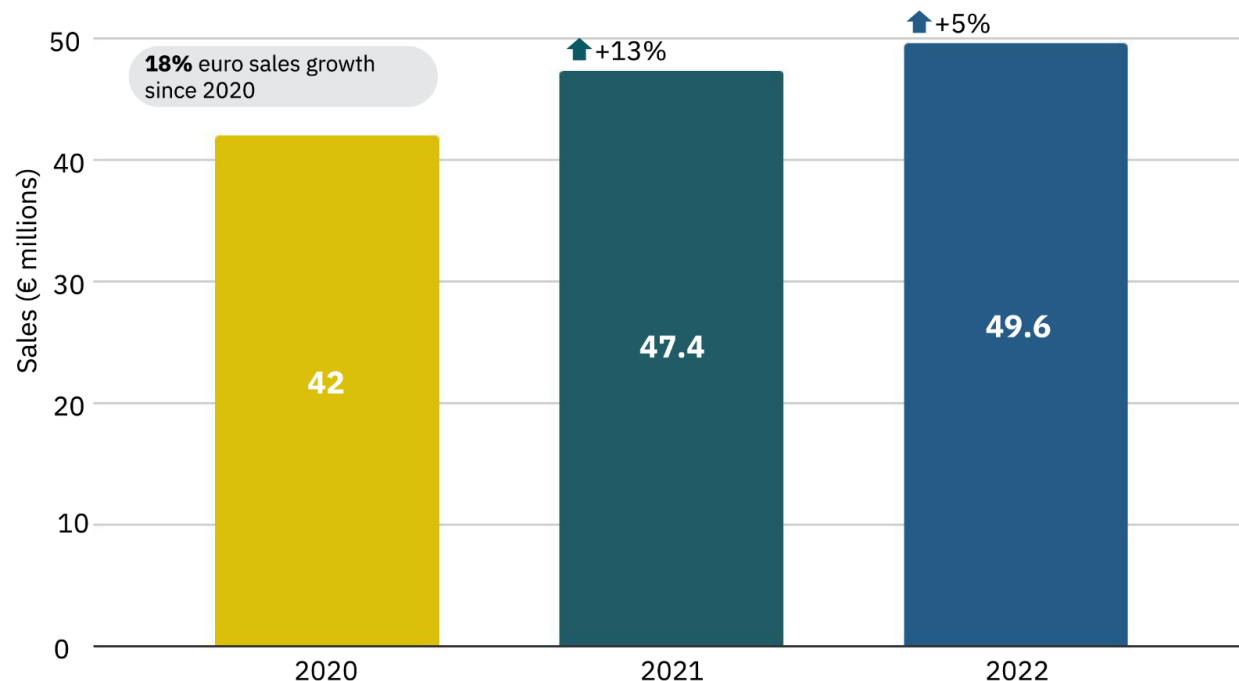


Key insights:

- The value of plant-based seafood sales grew a tremendous 1,327% between 2020 and 2022.
- Plant-based seafood unit sales grew by 1,078% between 2020 and 2022.
- The average price per unit of plant-based seafood in 2022 increased by 3%.

Plant-based milk

Austria plant-based milk sales (in € millions) 2020-2022



Key insights:

- The value of plant-based milk sales increased by 18% between 2020 and 2022, and unit sales increased by 21%.
- In comparison, conventional milk unit sales decreased by 10% between 2020 and 2022.
- The average price per unit of plant-based and conventional milk in 2022 increased by 1% and 4% respectively.
- In 2022, plant-based milk had a 10% market share of the total milk category.

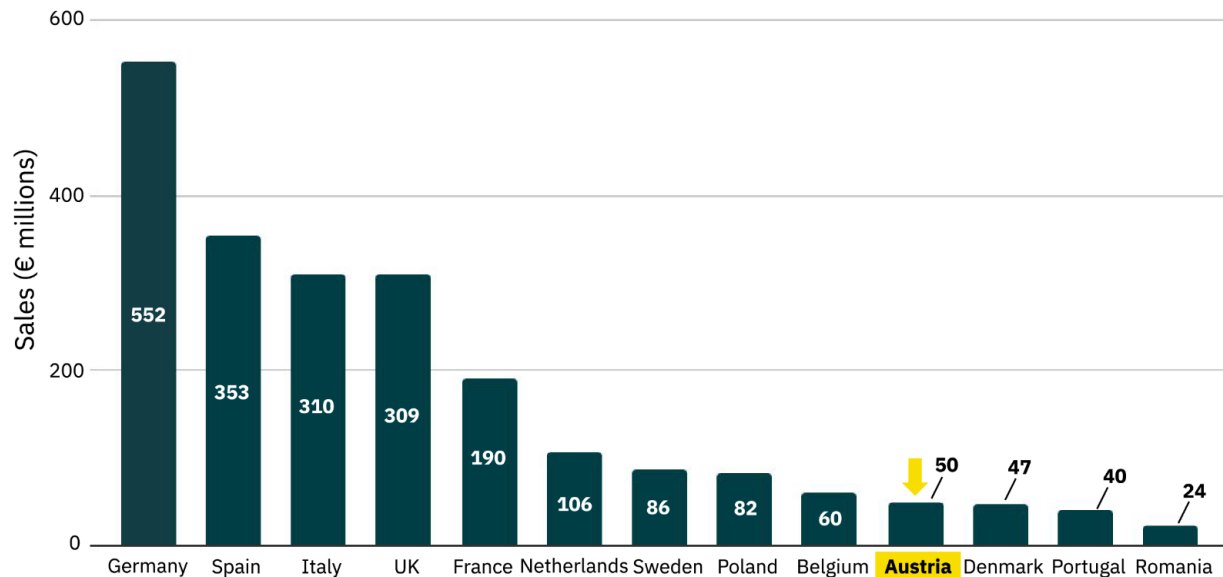
Segment insights:

- Oat milk is the category leader with 55% of category euro sales in 2022, followed by soy milk (17%) and almond milk (16%).
- Oat milk is also the only segment seeing growth in terms of sales value (106% between 2020 and 2022), whereas the value of both soy milk and almond milk sales is decreasing (-6% and -22% respectively between 2020 and 2022).
- Plain milk makes up 88% of the total plant-based milk euro sales in 2022, while flavoured milk and other milk-based beverages make up the remaining 12%.

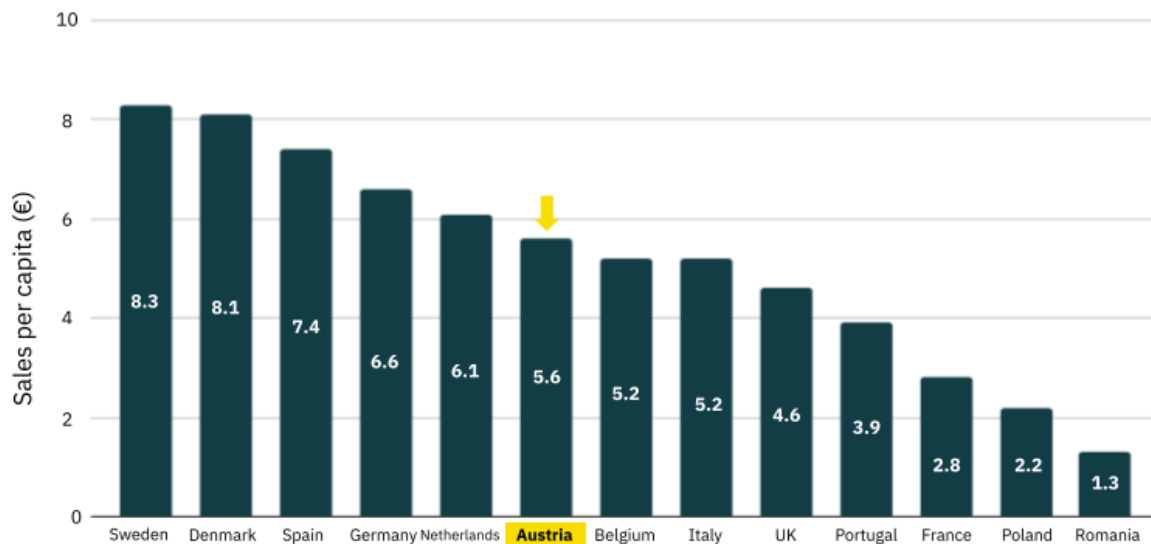
Country comparison

Austria ranks 10th in plant-based milk sales value in Europe but sixth in average plant-based milk spend per capita.

Europe-wide plant-based milk sales by country (in € millions), 2022

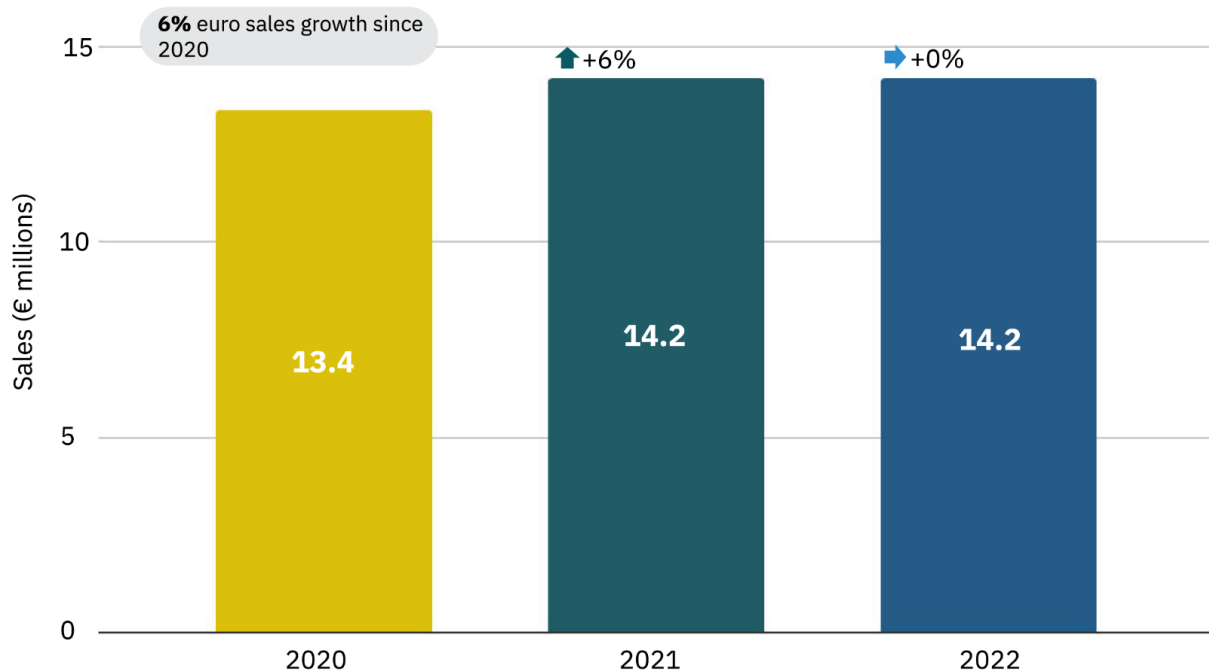


Europe-wide average plant-based milk spend per country per capita (in euros) , 2022



Plant-based yoghurt

Austria plant-based yoghurt sales (in € millions), 2020-2022



Key insights:

- The value of plant-based yoghurt sales grew 6% between 2020 and 2022, while total unit sales went up by 12%.
- In comparison, conventional yoghurt unit sales actually decreased by 7% between 2020 and 2022.
- In terms of average price per unit, the plant-based yoghurt category has been less impacted by inflation and price increases in 2022. Plant-based yoghurt prices increased by 2%, whereas conventional yoghurt prices increased by 10%.
- In 2022, plant-based yoghurt has a 4% market share of the total yoghurt category.

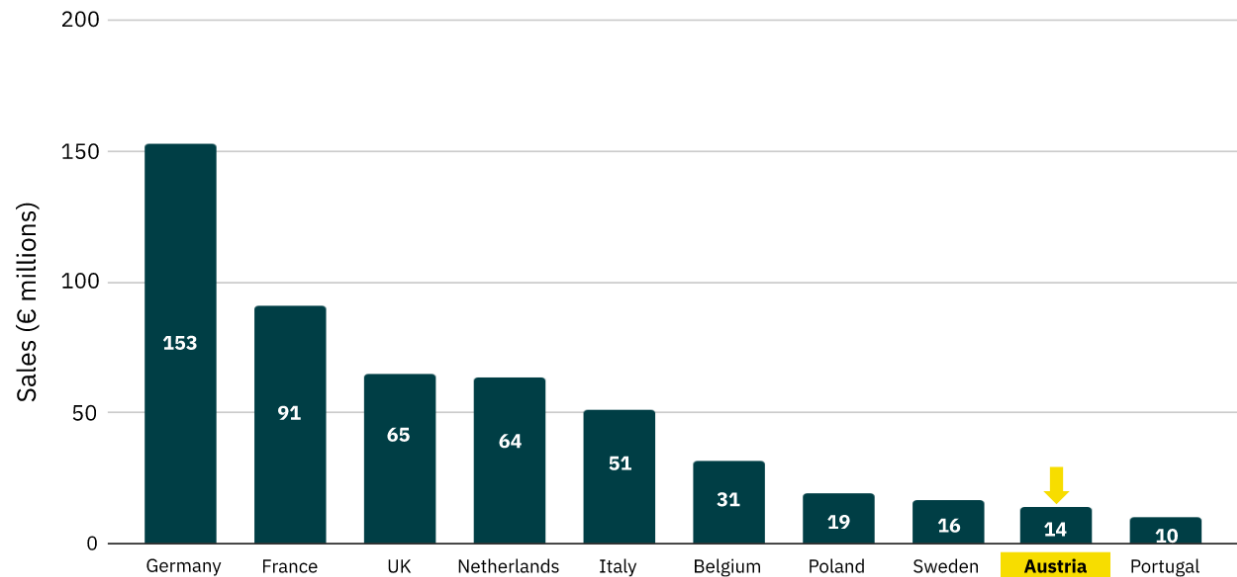
Segment insights:

- Soy yoghurt is the category leader with 60% of category euro sales in 2022, followed by coconut yoghurt (21%) and oat yoghurt (12%).
- Soy yoghurt and oat yoghurt are continuing to see growth in terms of euro sales (10% and 629% respectively between 2020 and 2022), whereas coconut yoghurt euro sales are decreasing (-16% between 2020 and 2022).

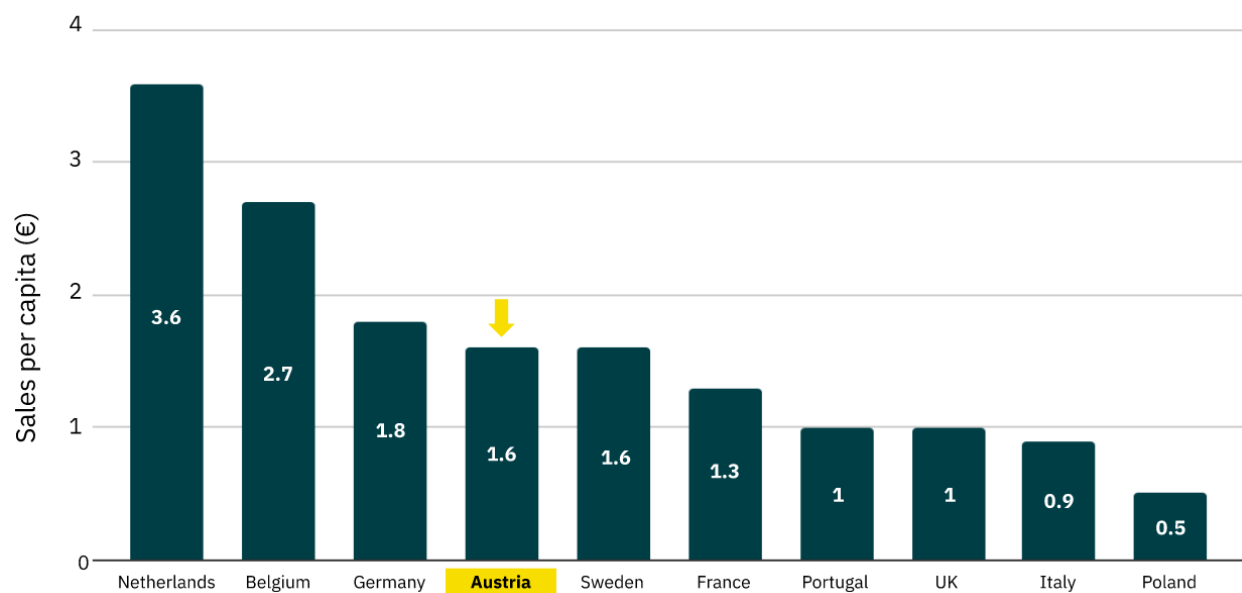
Country comparison

Austria ranks ninth in plant-based yoghurt sales value in Europe but fourth in average plant-based yoghurt spend per capita.

Europe-wide plant-based yoghurt sales by country (in € millions), 2022

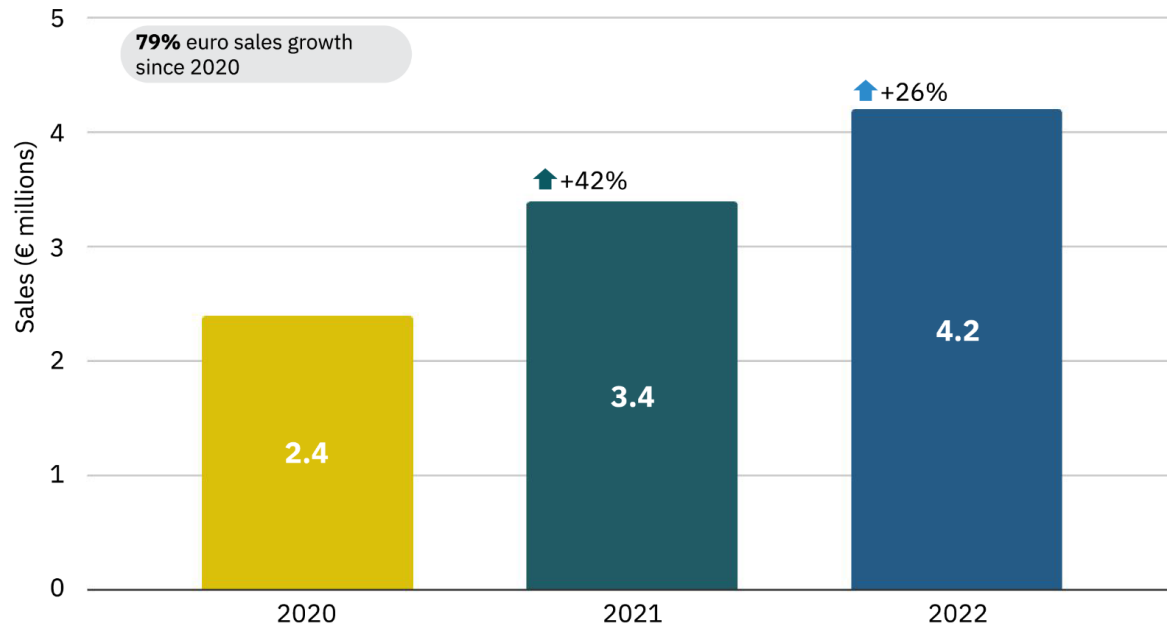


Europe-wide average plant-based yoghurt spend per country per capita (in euros), 2022



Plant-based cream

Austria plant-based cream sales (in € millions), 2020-2022

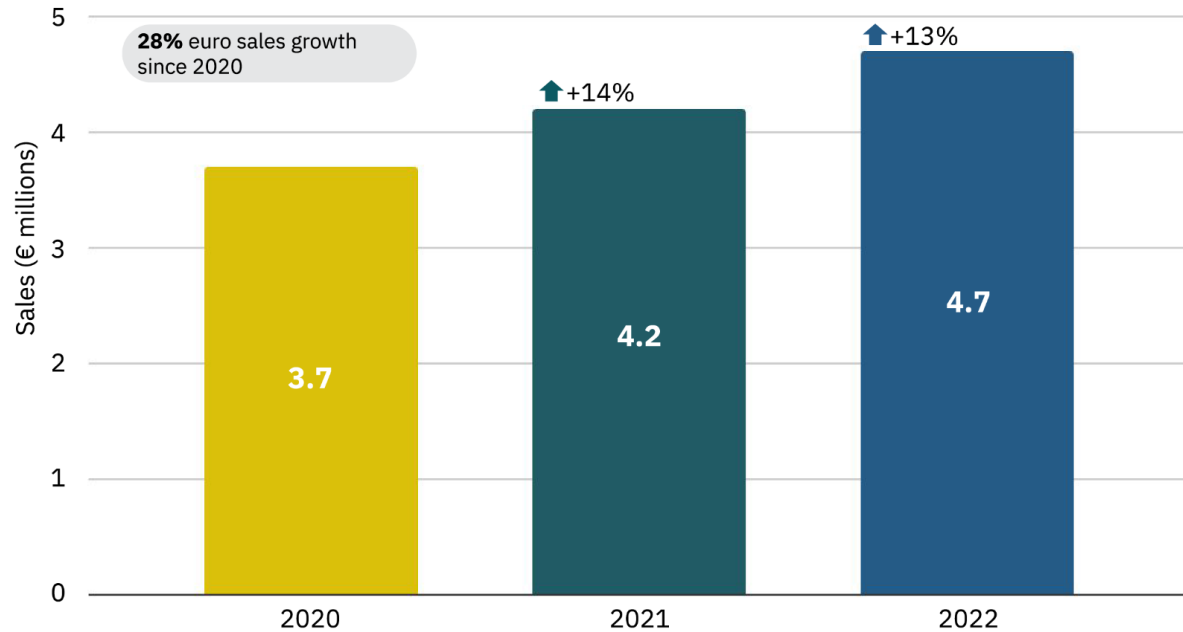


Key insights:

- The value of plant-based cream sales grew 79% between 2020 and 2022.
- Plant-based cream unit sales increased by 59% between 2020 and 2022.
- The average price per unit of plant-based cream in 2022 increased by 13%.

Plant-based dessert²

Austria plant-based dessert sales (in € millions), 2020-2022



Key insights:

- The value of plant-based dessert sales increased by 28% between 2020 and 2022.
- Plant-based dessert unit sales increased by 21% between 2020 and 2022.
- The average price per unit of plant-based dessert in 2022 increased by 9%.

² The plant-based dessert category is primarily made up of puddings.

Closing remarks

“The plant-based food retail market in Europe has seen significant growth in recent years, driven by better plant-based products being brought to market. This is encouraging as the world works to address the many problems caused by industrial animal agriculture. However, to sustain this growth, companies must continue investing in product innovation to develop plant-based products that meet consumer expectations when it comes to the key drivers of taste, price, and convenience. The Good Food Institute’s [Advancing Solutions for Alternative Proteins database](#) is a great source to better understand key innovation priorities.”

Carlotte Lucas,
*Senior Corporate Engagement Manager at
the Good Food Institute Europe*



About the data

To size the Austrian retail market for plant-based foods, GFI Europe commissioned retail sales data from market research firm NielsenIQ. Analysis in this report is based on data reported by NielsenIQ for the total plant-based, total dairy products, and total pre-packed meat categories for the 52-week, 104-week, and 156-week periods ending 31 December 2022, for the Austria market, according to GFI Europe product hierarchy. Therefore the data presented in this report may not align with standard NielsenIQ categories. Copyright © 2022, Nielsen Consumer, LLC.

About the Good Food Institute Europe

[The Good Food Institute Europe](#) is an international NGO helping to build a more sustainable, secure and just food system by transforming meat production.

We work with scientists, businesses and policymakers to advance plant-based and cultivated meat – making them delicious, affordable and accessible across Europe.

By making meat from plants and cultivating it from cells, we can reduce the environmental impact of our food system and feed more people with fewer resources. GFI Europe is powered by philanthropy.

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