

Italy 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%

The value of plant-based food 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 sales summary, 2022

	2022 sales value	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 Italy are a €680.9 million market.

The Italian plant-based food retail market is the third largest market in Europe, and sales continue to grow – increasing by 21% to €680.9 million between 2020 and 2022.

Plant-based milk is Italy's most developed category of plant-based products and experienced steady growth between 2020 and 2022. All plant-based categories grew in 2022, with the fastest-growing categories being plant-based meals, meat, milk, yoghurt and dessert – all demonstrating double-digit growth in sales value in 2022.

Dive into the report to better understand the Italian 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.

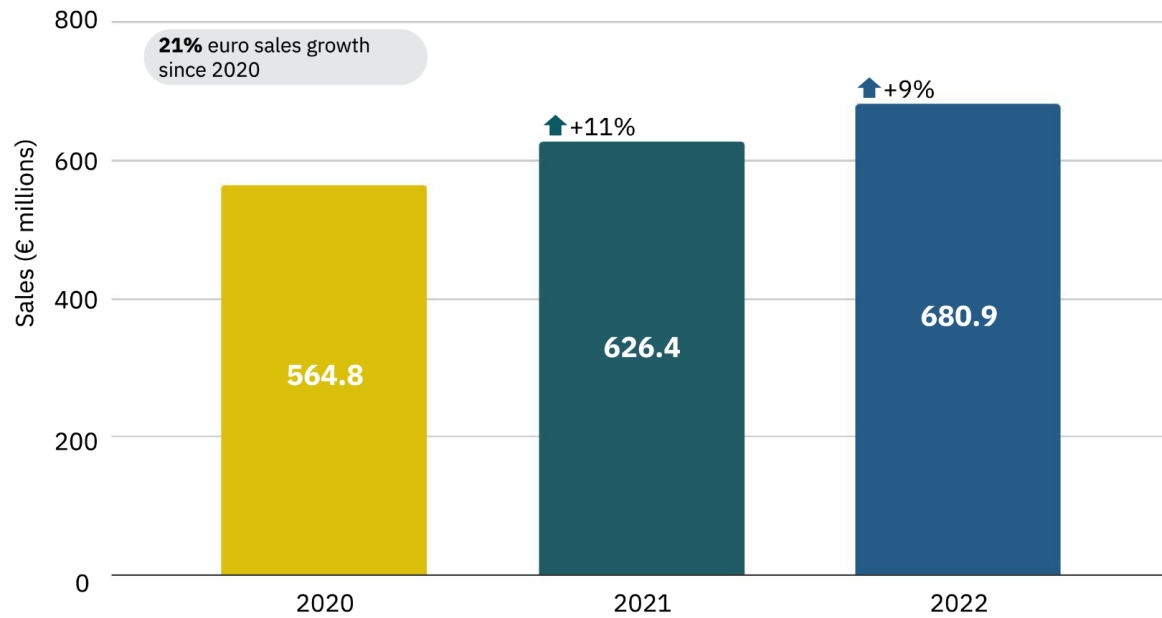
Table of contents

Overall plant-based food market	5
Categories	5
Country comparison	7
Comparison to animal-based foods	8
Plant-based meat	9
Plant-based meals	11
Plant-based milk	12
Plant-based yoghurt	14
Plant-based cream	16
Plant-based ice cream	17
Plant-based dessert	18
Closing remarks	19
About the data	19

Overall plant-based food market

Plant-based food sales in Italy grew by 9% in 2022 to reach €680.9 million.

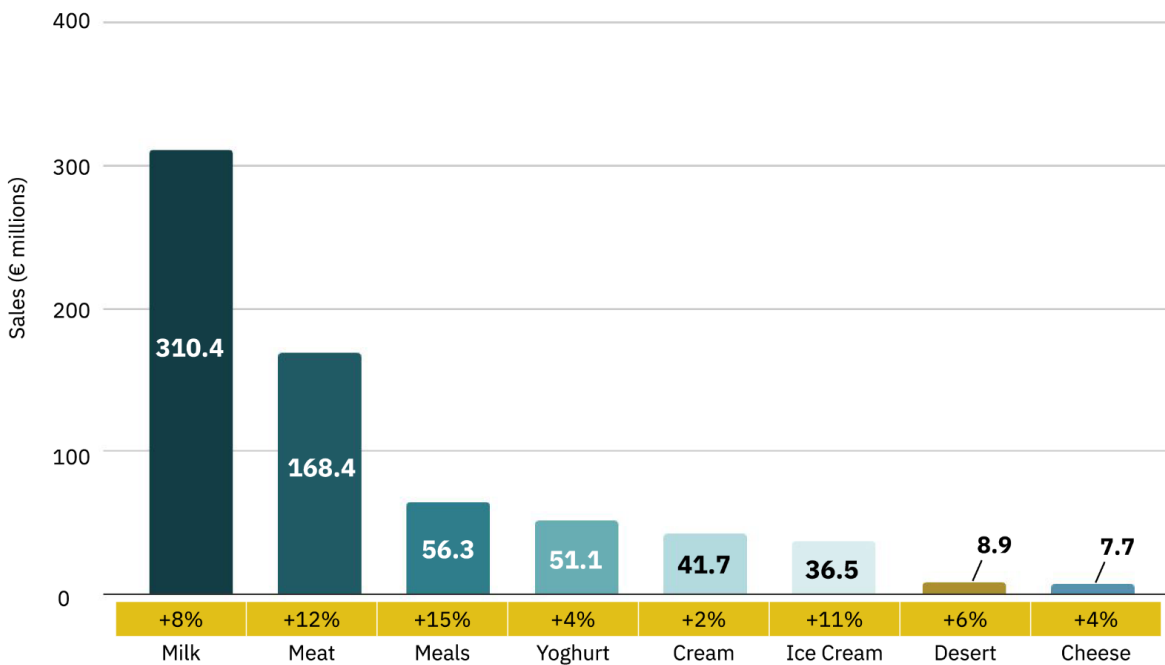
Italy plant-based foods sales (in € millions), 2022



Categories

Plant-based categories are in various stages of development.

Italy plant-based foods sales by category (in € millions), 2022



Key insights:

- **Plant-based milk is the most developed of all plant-based categories.**
Plant-based milk sales were €310.4 million in 2022, and the category continued to experience steady growth.
- **Plant-based meat sales continued to increase, totalling €168.4 million in 2022,** growing 40% between 2020 and 2022.
- **Every category grew in 2022.** The fastest-growing categories were plant-based meals, plant-based meat, and plant-based ice cream – all demonstrating double-digit growth in sales value in 2022.
- **Plant-based categories grew more rapidly than animal-based categories.**
Unit sales growth of the plant-based milk, meat, and yoghurt categories outpaced that of animal-based categories in 2022.

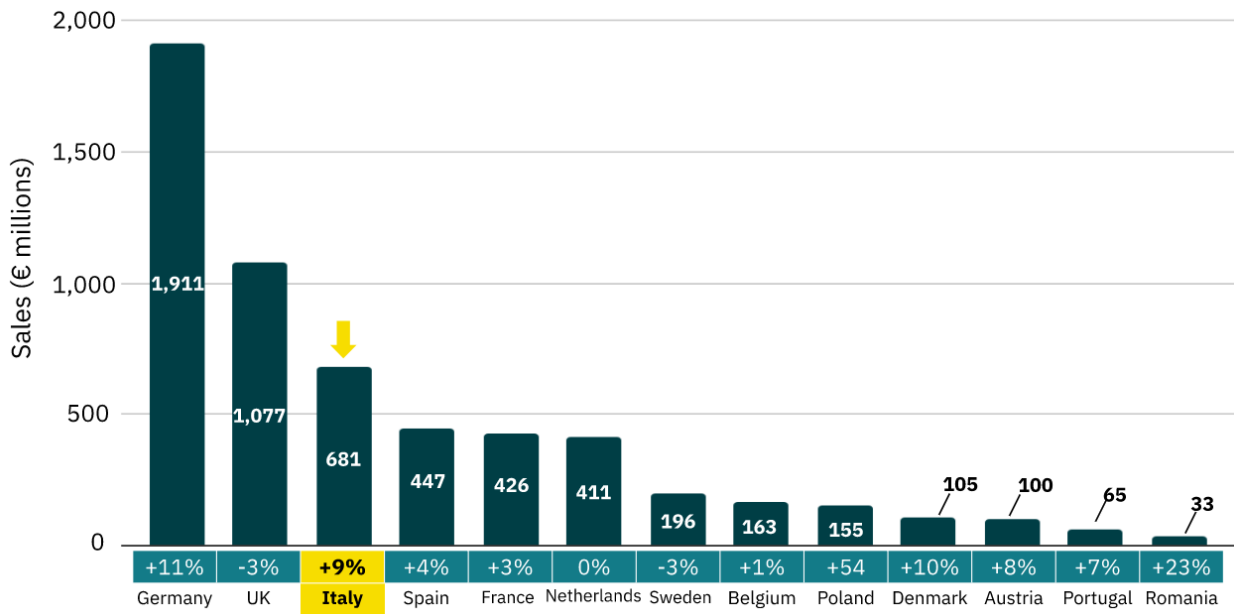
Plant-based category sales summary, 2022

	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	€310.4 M	8%	18%	164.2 M	5%	14%
Meat	€168.4 M	12%	40%	64.6 M	7%	32%
Meals	€56.3 M	15%	58%	24.4 M	11%	55%
Yoghurt	€51.1 M	4%	13%	37.7 M	1%	9%
Cream	€41.7 M	2%	-20%	33.7 M	-11%	-30%
Ice cream	€36.5 M	11%	8%	11.2 M	4%	3%
Dessert	€8.9 M	6%	12%	5.7 M	1%	9%
Cheese	€7.7 M	4%	11%	3.3 M	2%	10%
Total	€680.9 M	9%	21%	344.8 M	3%	11%

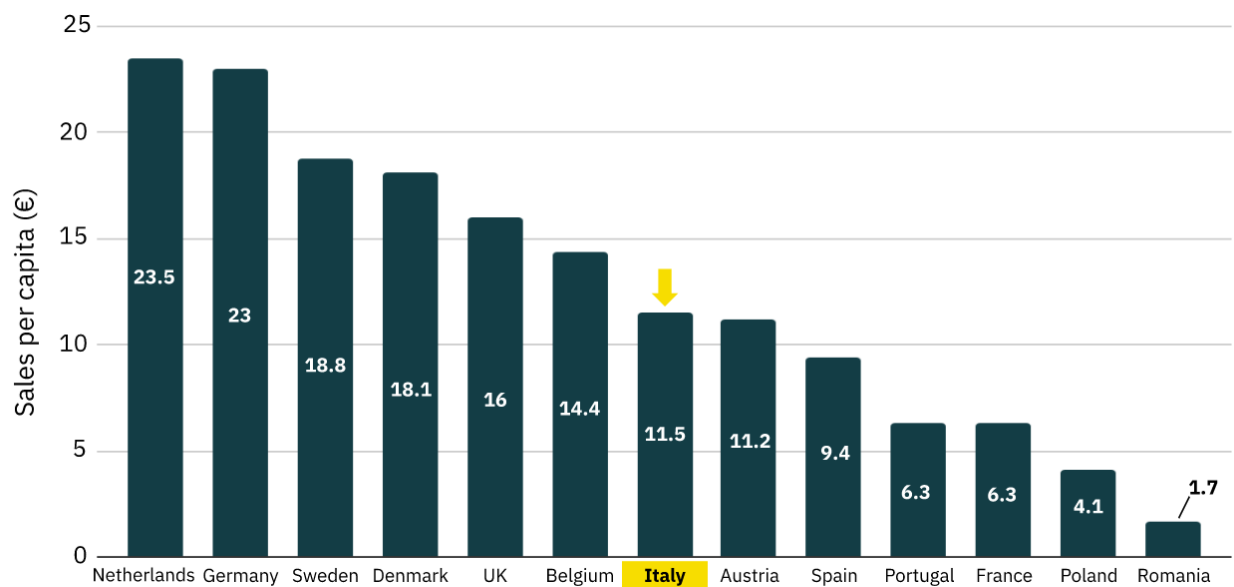
Country comparison

Italy has the third highest plant-based food sales value in Europe. However, in terms of average plant-based food spend per capita, Italy ranks seventh.

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



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



Comparison to animal-based foods

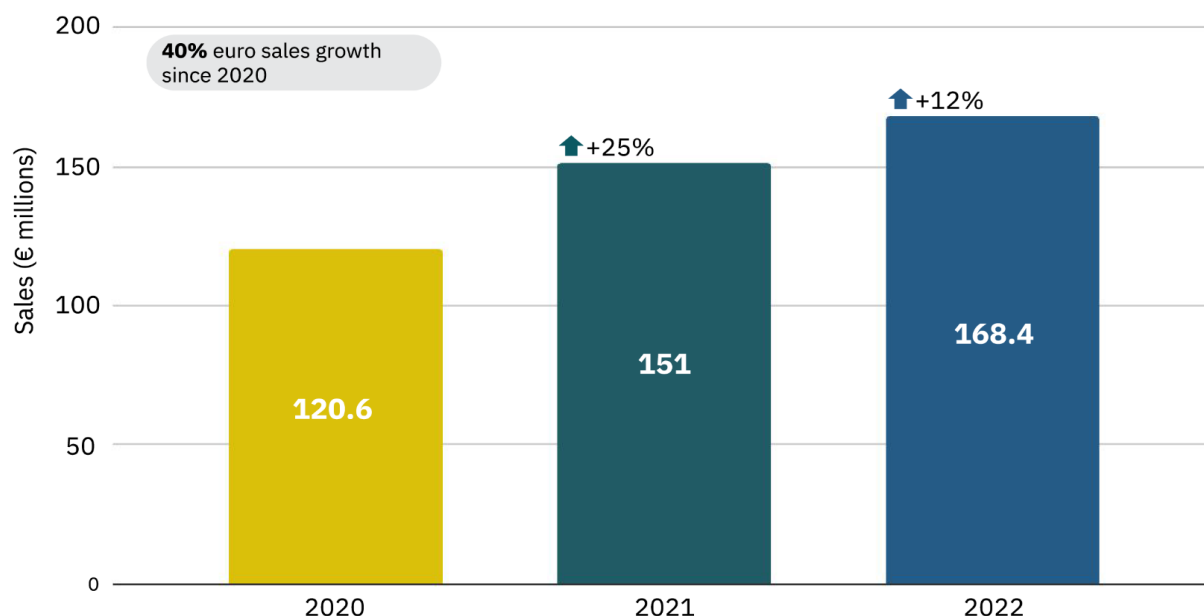
Italy plant-based vs animal-based category unit sales growth, 2022



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

Plant-based meat¹

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



Key insights:

- The value of plant-based meat sales increased by 40% between 2020 and 2022, while total unit sales for plant-based meat increased by 32%.
- In comparison, pre-packaged conventional meat unit sales increased by 5% between 2020 and 2022.
- The average price per unit of plant-based and pre-packaged conventional meat in 2022 increased by 4% and 9% respectively.
- In 2022, plant-based meat had a 10% market share of the total retail pre-packaged meat category.²

Segment insights:

- Refrigerated plant-based meat makes up the majority of the category by sales value in 2022, representing 85% of total plant-based meat sales, whereas frozen and shelf-stable plant-based meat makes up 14% and 1% respectively.
- The most popular plant-based meat formats are processed meat products (e.g. burgers, mince, sausages, nuggets), which make up 94% of sales by value, followed by cold cuts (6%).

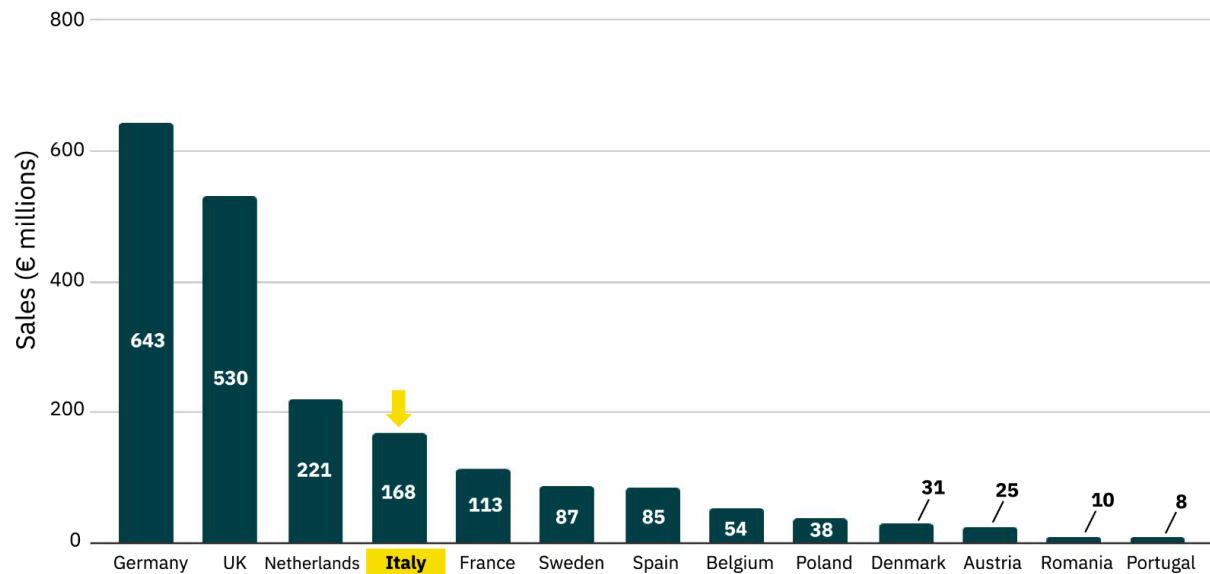
¹ The plant-based meat category includes both analogues (products that mimic the appearance and taste of animal-based meat) and non-analogues (e.g. vegetable-based patties).

² Nielsen only reports on pre-packaged animal-based meat sales, therefore the market share calculation is only for the pre-packaged meat category.

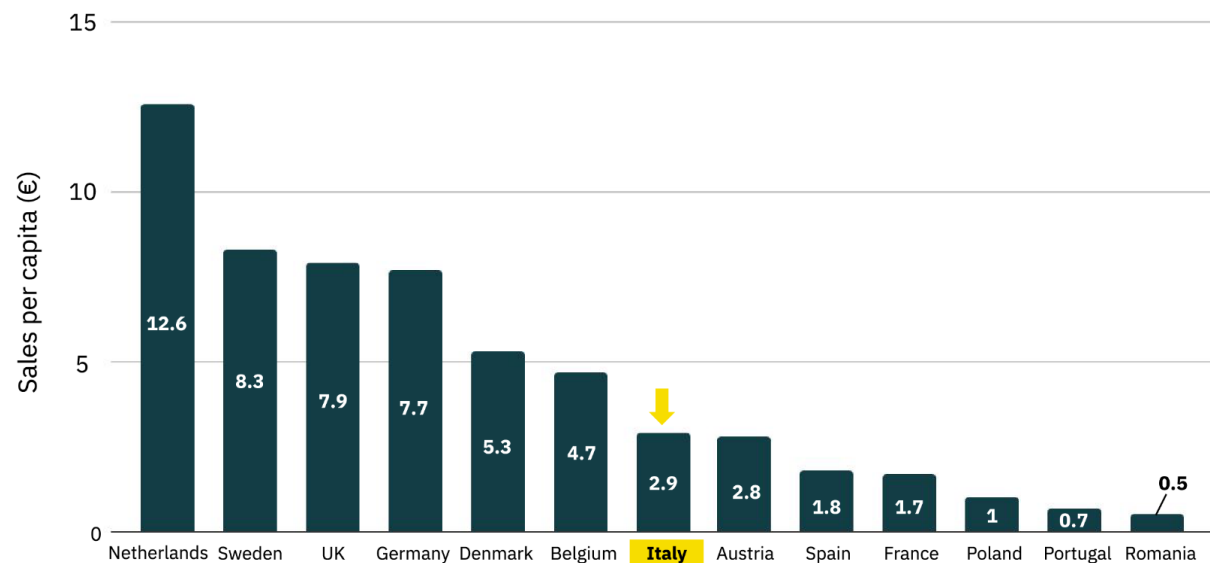
Country comparison

Italy has the fourth highest plant-based meat sales value in Europe. However, in terms of average plant-based meat spend per capita, Italy ranks seventh.

Plant-based meat sales per country (in € millions), 2022

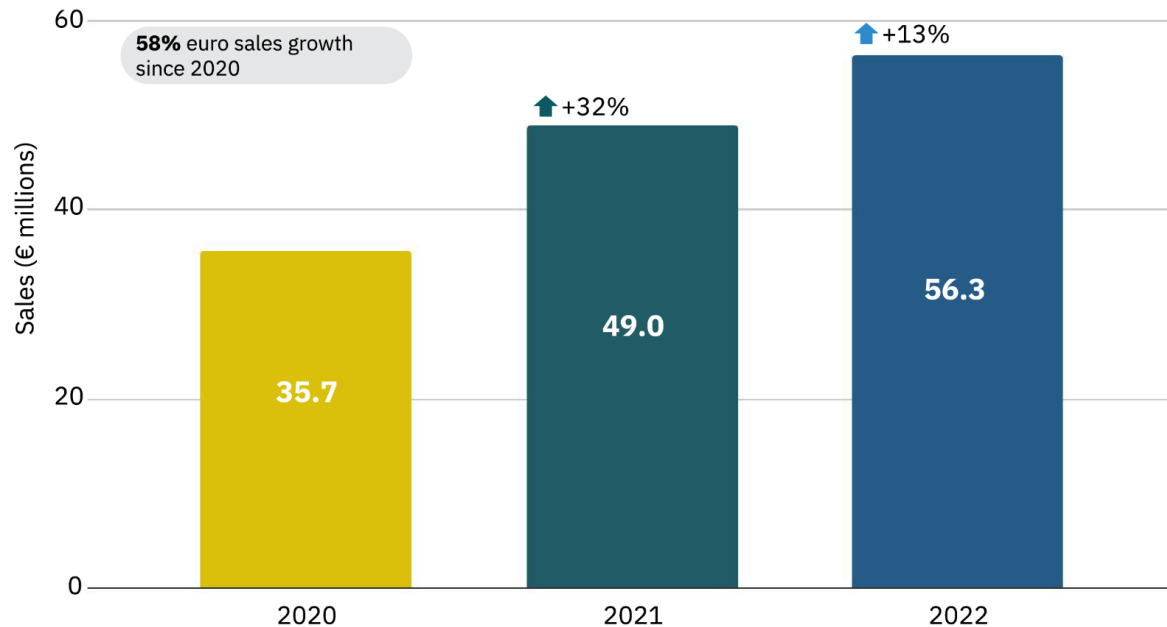


Average plant-based meat spend per country per capita (in euros), 2022



Plant-based meals³

Italy plant-based meals sales (in € millions), 2020-2022



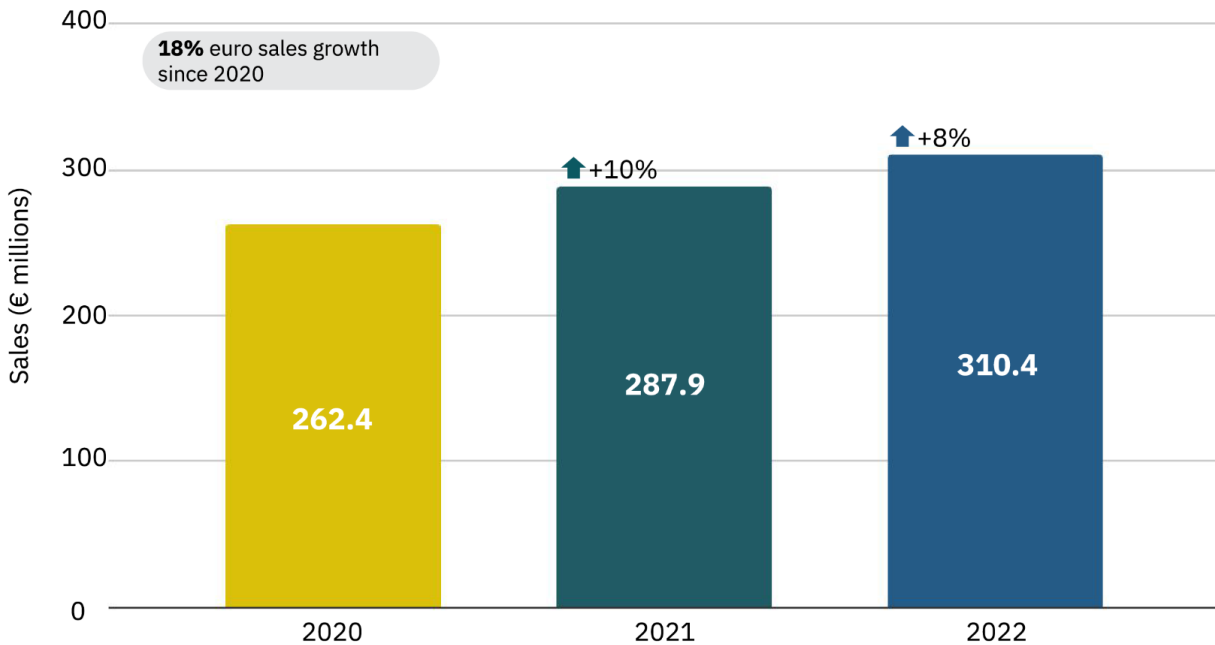
Key insights:

- The value of plant-based meal sales increased by 58% between 2020 and 2022.
- Plant-based meal unit sales increased by 55% between 2020 and 2022.
- The average price per plant-based meal unit increased by 3% in 2022.

³ The plant-based meal category covers refrigerated, shelf-stable, and frozen prepared meals including sandwiches, lasagnas, and vegetable dishes.

Plant-based milk

Italy 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 14%.
- In comparison, conventional milk unit sales decreased by 7% between 2020 and 2022.
- In terms of average price per unit, the plant-based milk category was less impacted by inflation and price increases in 2022. Plant-based milk prices increased by 3%, whereas conventional milk prices increased by 13%.
- In 2022, plant-based milk had a 12% market share of the total milk category.

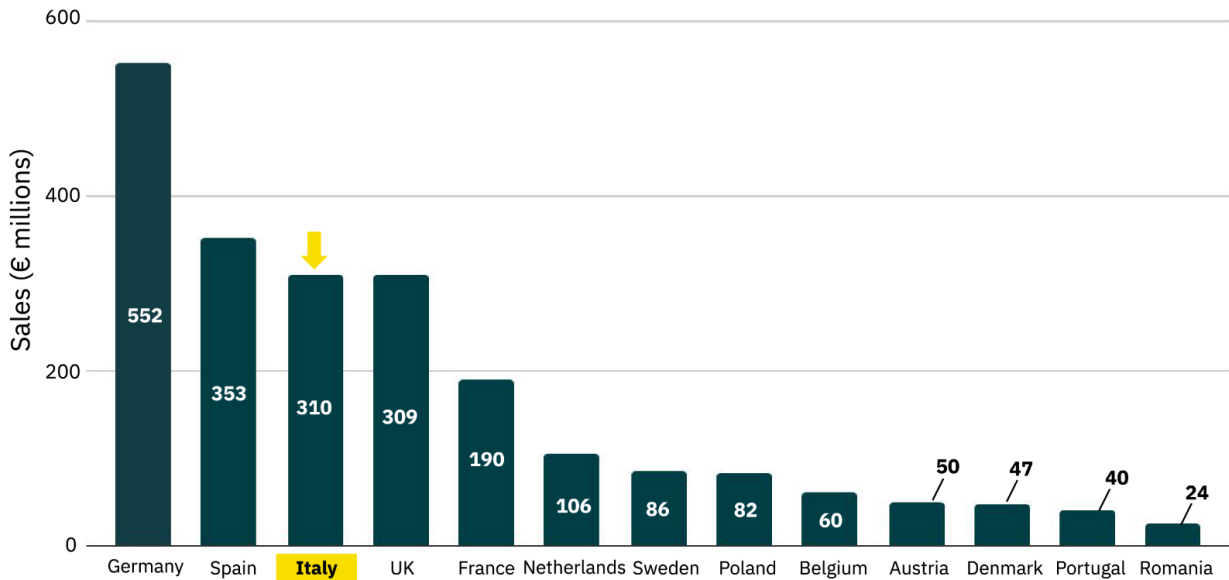
Segment insights:

- Soy milk is the category leader with 31% of category sales value in 2022, followed by oat milk (23%) and almond milk (19%).

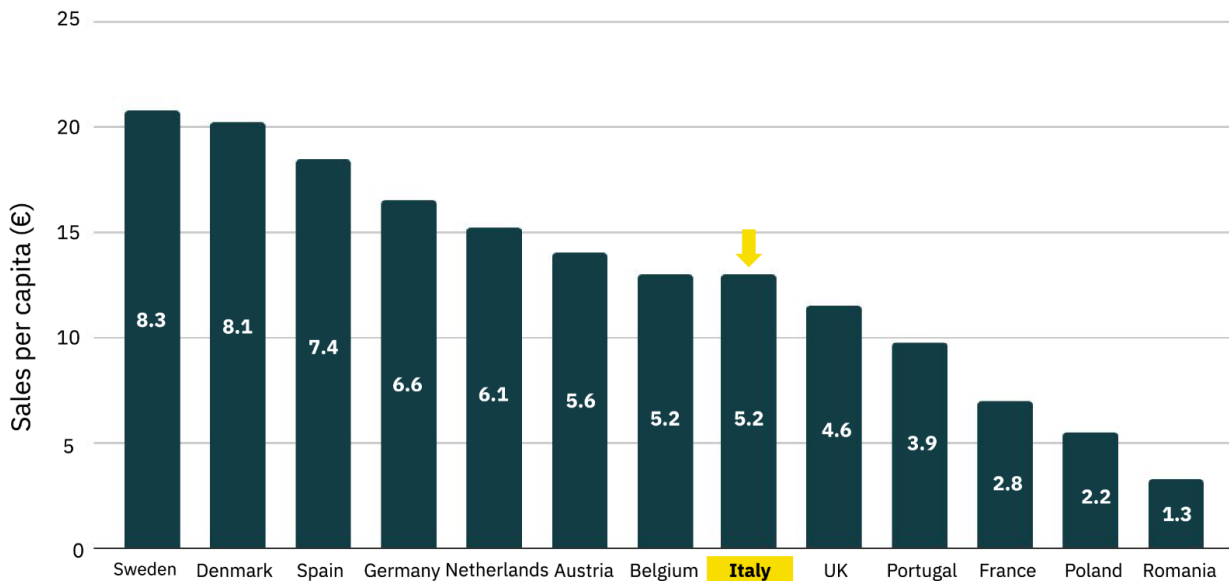
Country comparison

Italy has the third highest plant-based milk sales value in Europe. However, in terms of average plant-based milk spend per capita, Italy ranks eighth.

Plant-based milk sales per country (in € millions), 2022

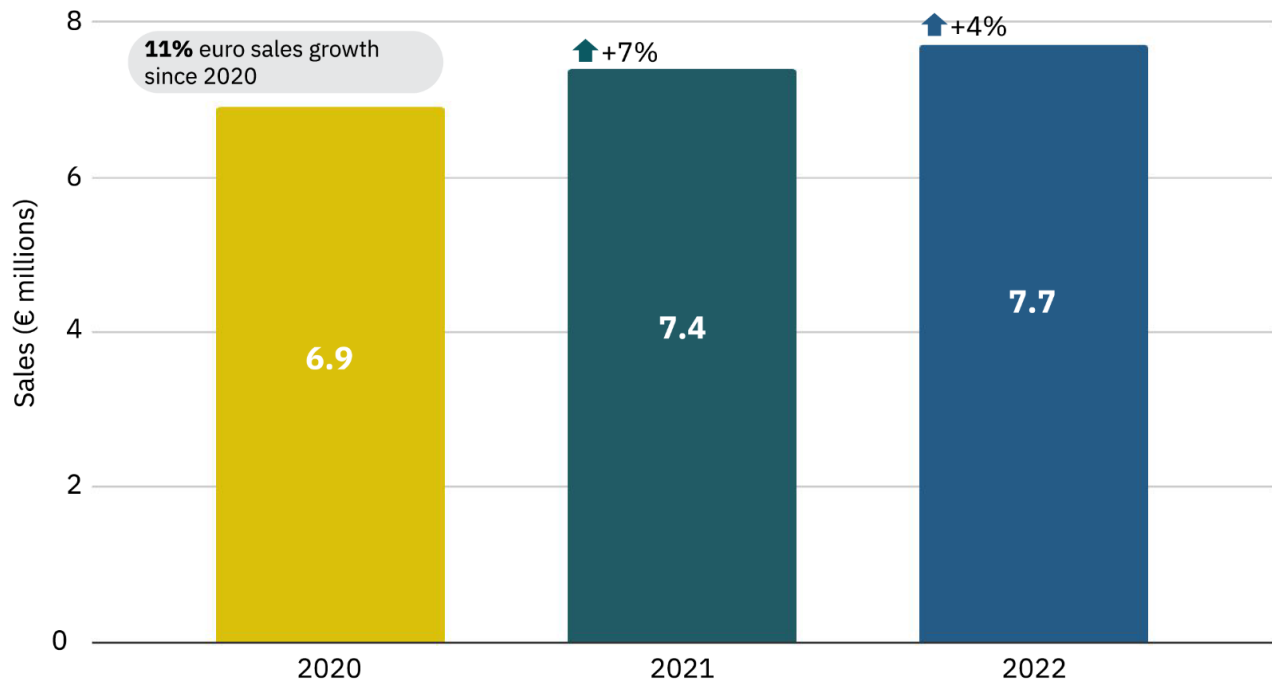


Average plant-based milk spend per country per capita (in euros), 2022



Plant-based cheese

Italy plant-based cheese sales (in € millions), 2020-2022



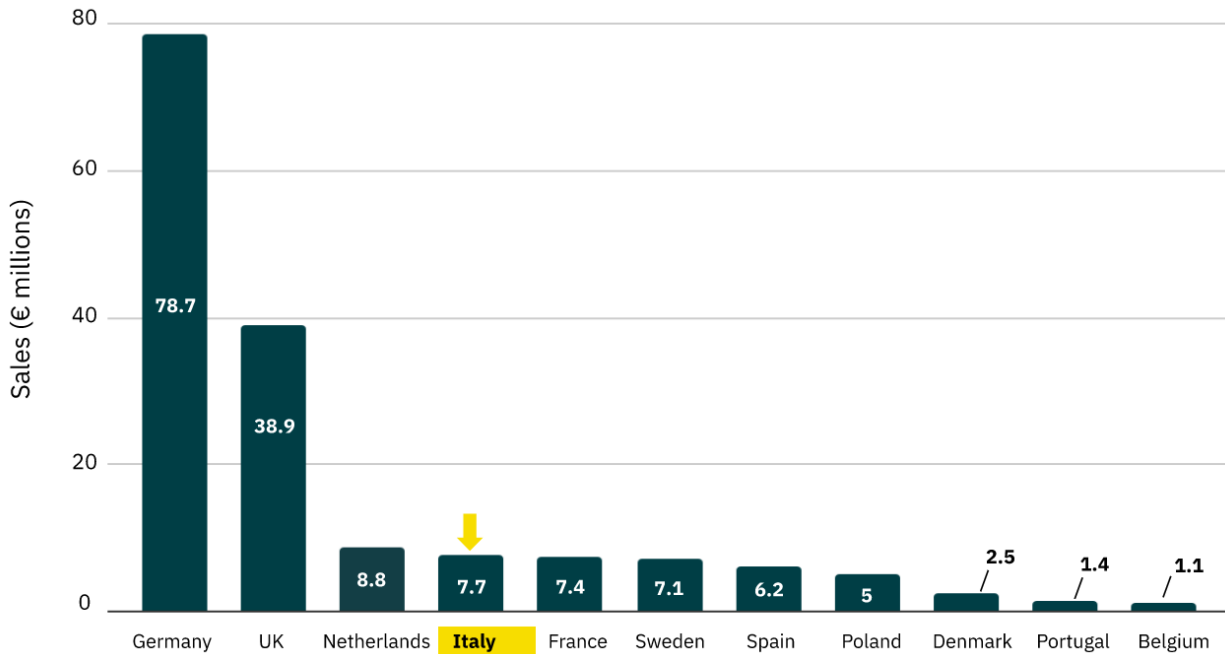
Key insights:

- The value of plant-based cheese sales increased by 11% between 2020 and 2022, and unit sales increased by 10%.
- In comparison, conventional cheese unit sales decreased by 4% between 2020 and 2022.
- In terms of average price per unit, the plant-based cheese category has been less impacted by inflation and price increases in 2022, with prices rising by 1%, whereas conventional cheese prices increased by 11%.
- In 2022, plant-based cheese had a 0.2% market share of the total cheese category.

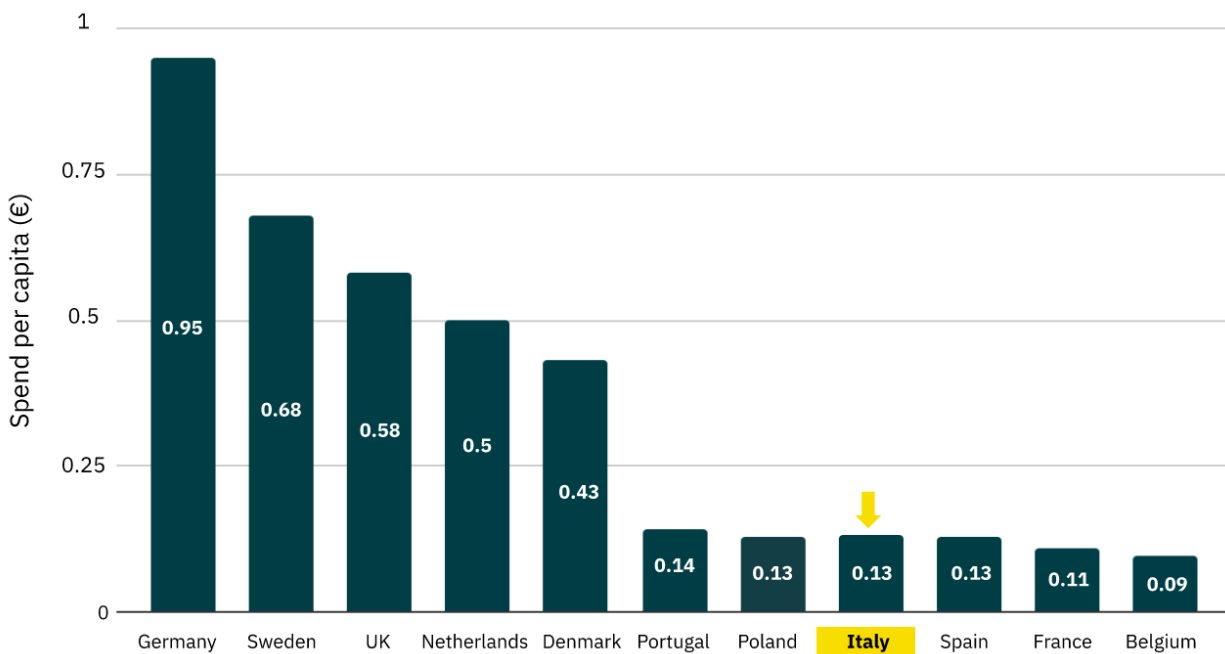
Country comparison

Italy has the fourth highest plant-based cheese sales value in Europe. However, in terms of average plant-based cheese spend per capita, Italy ranks eighth.

Plant-based cheese sales per country (in € millions), 2022

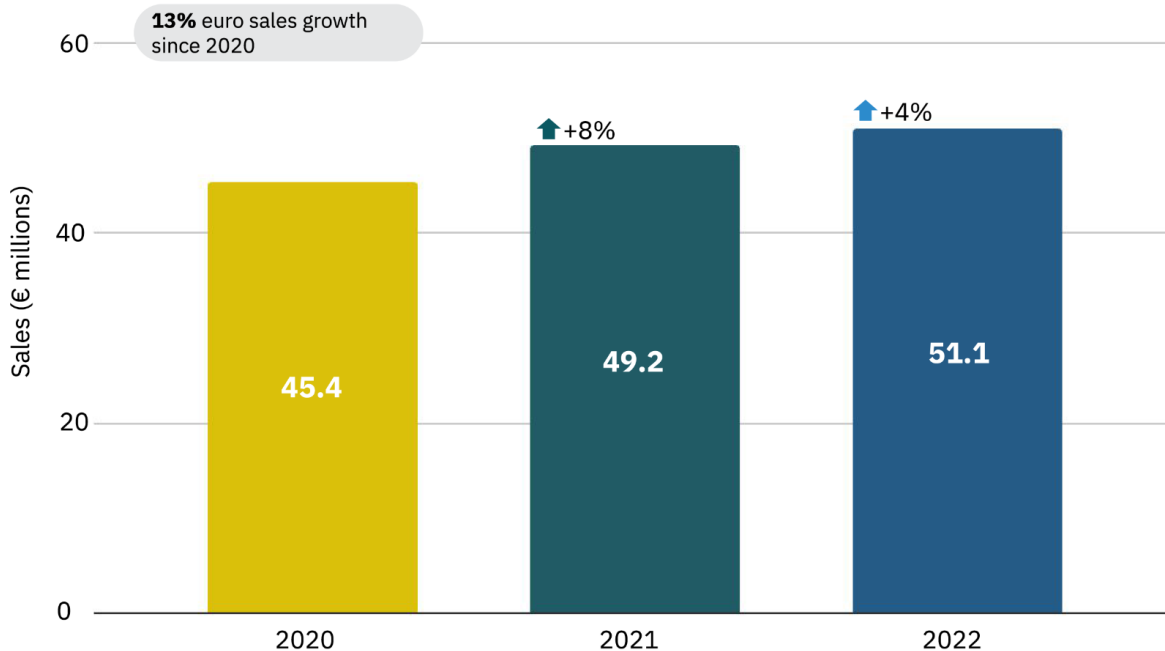


Average plant-based cheese spend per country per capita (in euros), 2022



Plant-based yoghurt

Plant-based yoghurt euro sales (in millions), 2020-2022



Key insights:

- The value of plant-based yoghurt sales increased by 13% between 2020 and 2022, and unit sales increased by 9%.
- In comparison, conventional yoghurt unit sales decreased by 0.2% 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 3%, whereas conventional yoghurt prices increased by 7%.
- In 2022, plant-based yoghurt had a 3% market share of the total yoghurt category.

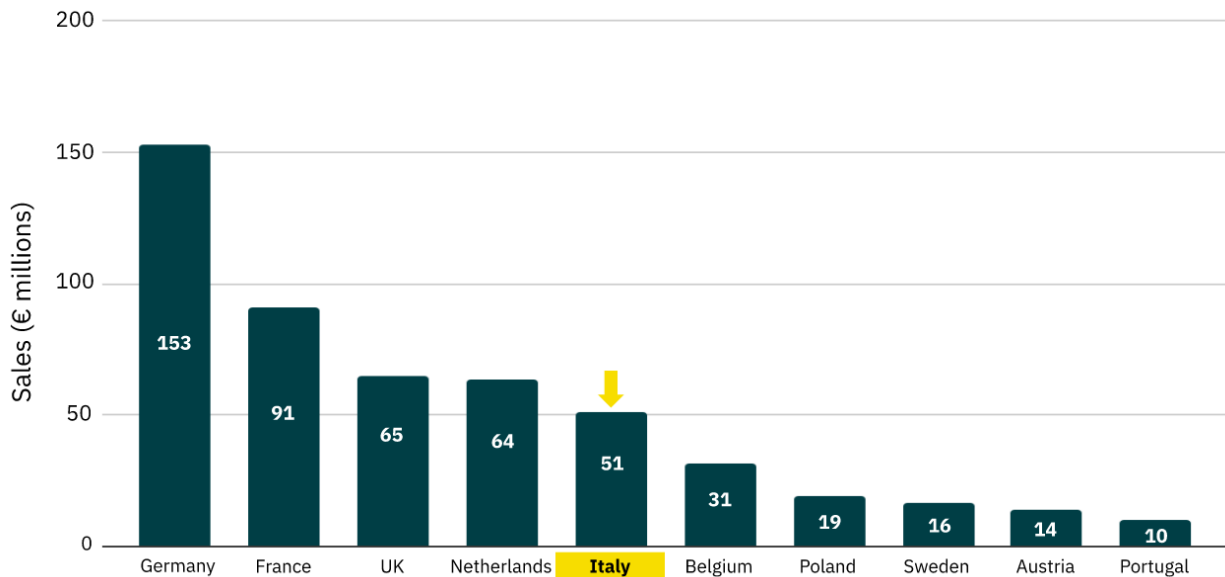
Segment insights:

- Soy yoghurt is the category leader with 85% of category sales value in 2022.

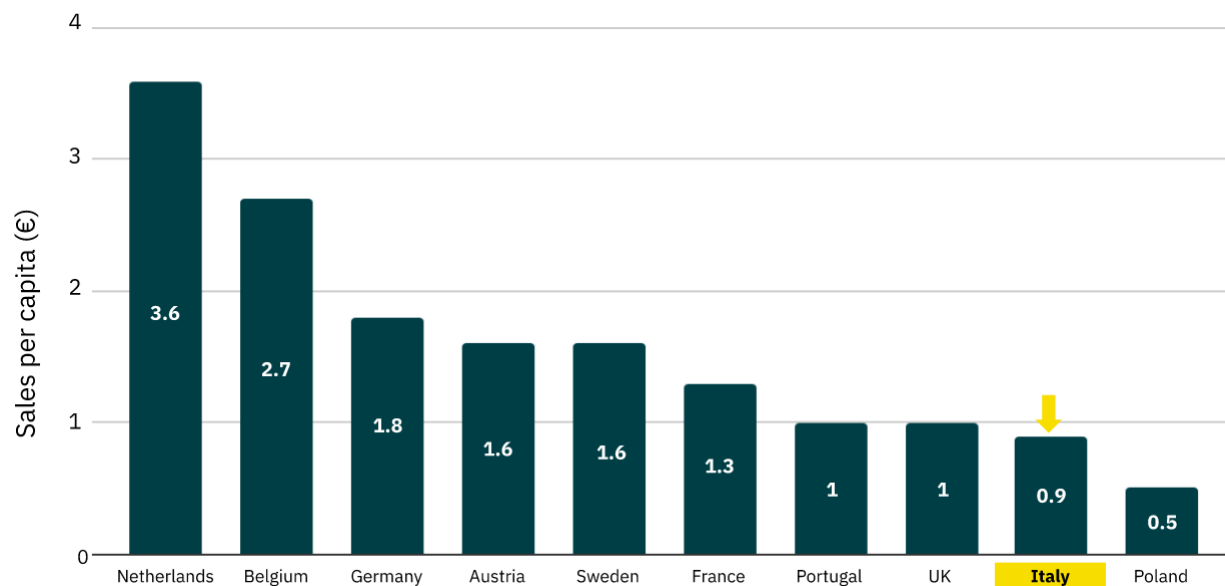
Country comparison

Italy has the fifth highest plant-based yoghurt sales value in Europe. However, in terms of average plant-based yoghurt spend per capita, Italy ranks ninth.

Plant-based yoghurt euro sales per country (in € millions), 2022

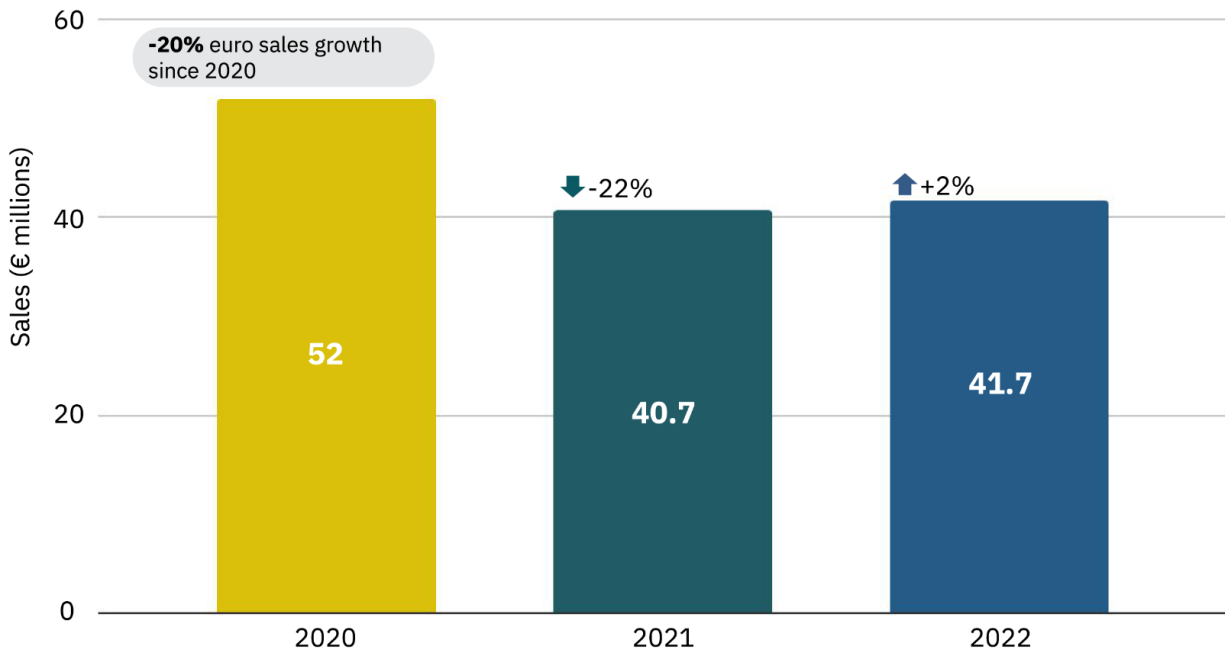


Average plant-based yoghurt spend per country per capita (in euros), 2022



Plant-based cream

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

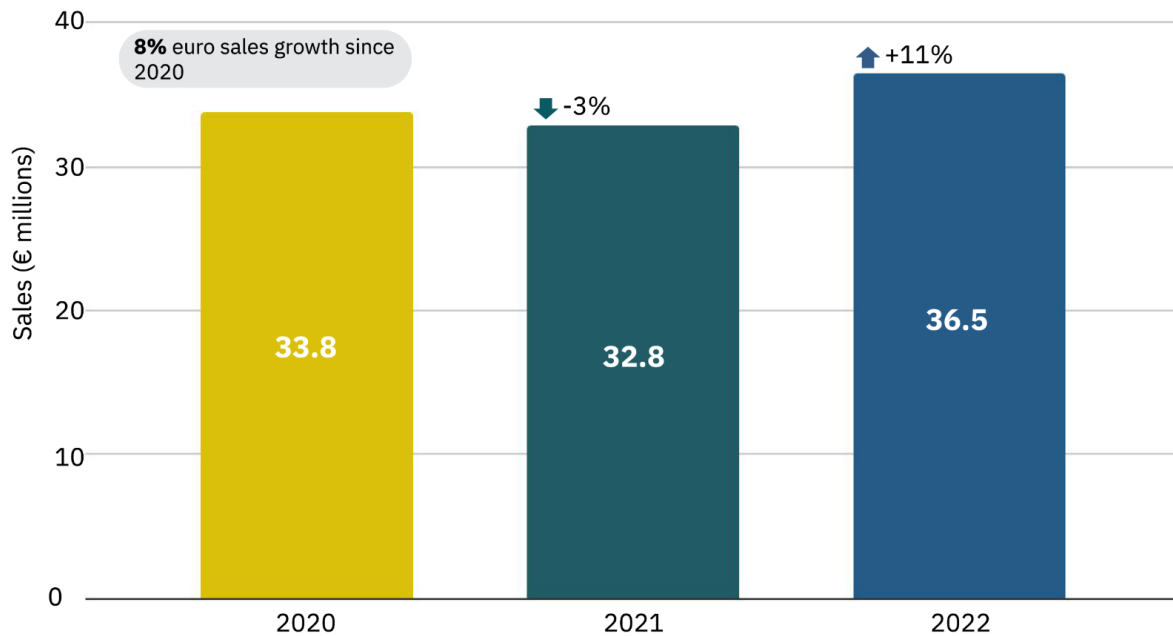


Key insights:

- The value of plant-based cream sales decreased by 20% between 2020 and 2022.
- Plant-based cream unit sales decreased by 30% between 2020 and 2022.
- The average price per unit of plant-based cream in 2022 increased by 15%.

Plant-based ice cream

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

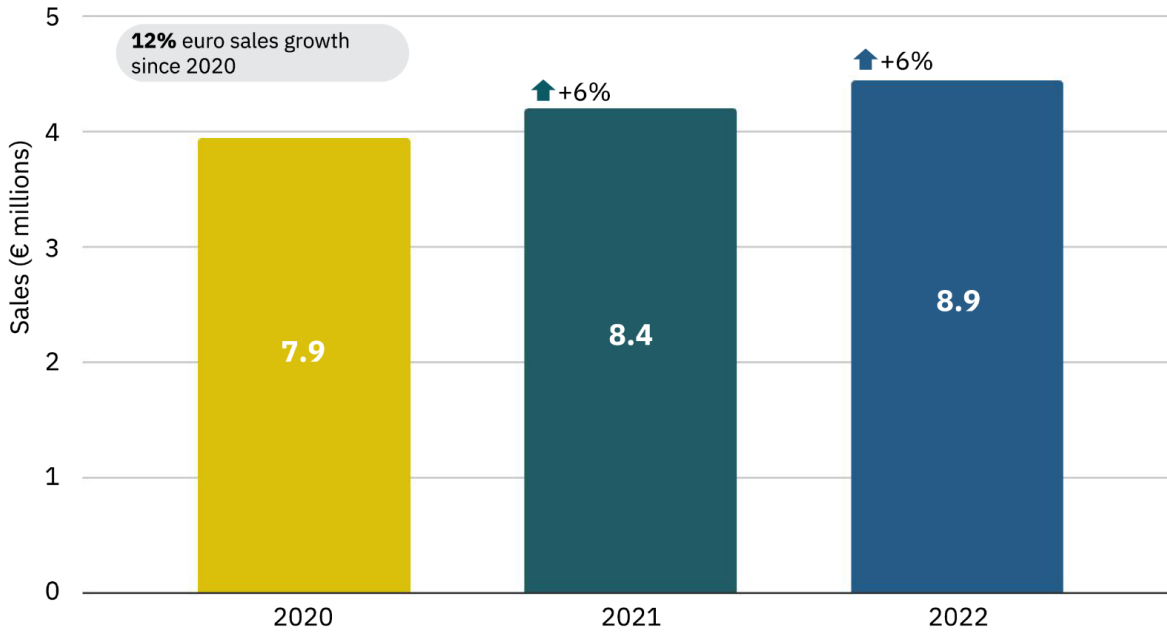


Key insights:

- The value of plant-based ice cream sales increased by 8% between 2020 and 2022.
- Plant-based ice cream unit sales increased by 3% between 2020 and 2022.
- The average price per plant-based ice cream unit increased by 7% in 2022.

Plant-based dessert⁴

Plant-based dessert euro sales (in millions), 2020-2022



Key insights:

- The value of plant-based dessert sales increased by 12% between 2020 and 2022.
- Plant-based dessert unit sales increased by 9% between 2020 and 2022.
- The average price per plant-based dessert unit increased by 4% in 2022.

⁴ The plant-based dessert category is primarily made up of pudding.

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 Italian 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 Italy 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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