



Poland 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 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 Poland are a 729 million zloty market.

The Polish 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 109%¹ between 2020 and 2022 to 729 million zloty.

Plant-based milk is Poland'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 milk, plant-based cheese, plant-based yoghurt, and plant-based dessert – all demonstrating double-digit sales growth in 2022.

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. The corresponding sections of the report, as well as the executive summary and overall plant-based food market section, have been updated with the correct sales figures.

¹ The 109% increase in sales value between 2020 and 2022 was driven significantly by the inclusion of the plant-based meat category for the first time in NielsenIQ's plant-based food retail sales accounting. NielsenIQ did not track plant-based meat sales in 2020 and 2021. If omitting the plant-based meat category, plant-based foods grew by 59% between 2020 and 2022.

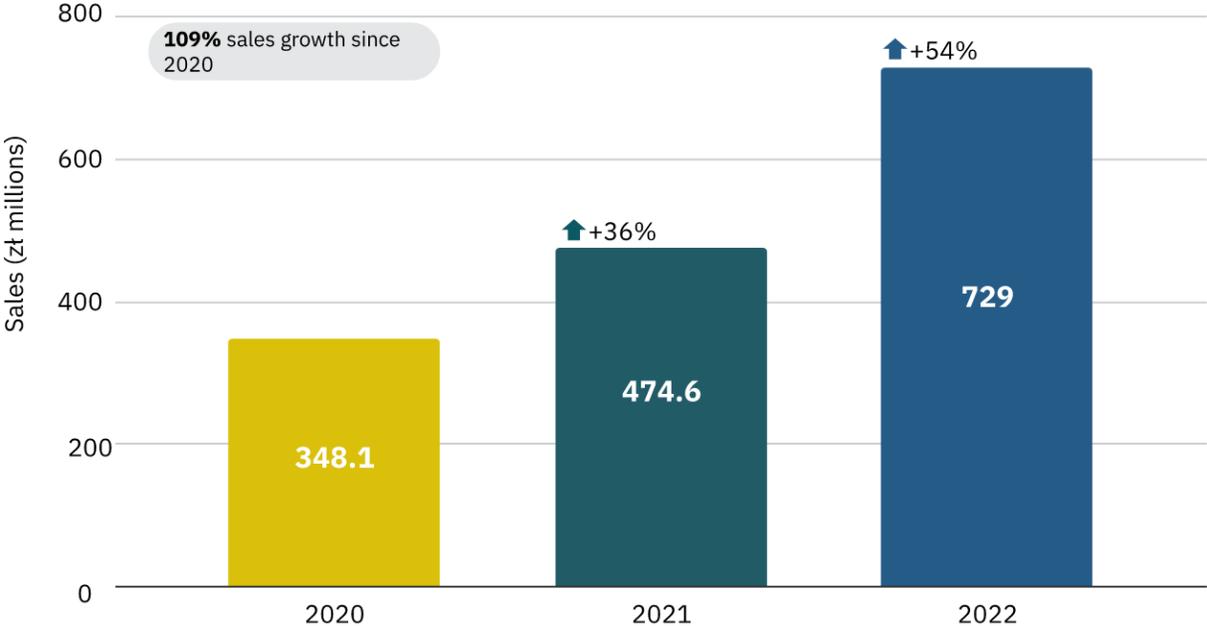
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Overall plant-based food market

Plant-based food sales in Poland grew by 54%² in 2022 to reach 729 million zloty (€155.3 million).

Poland plant-based foods sales (in zł millions), 2020-2022

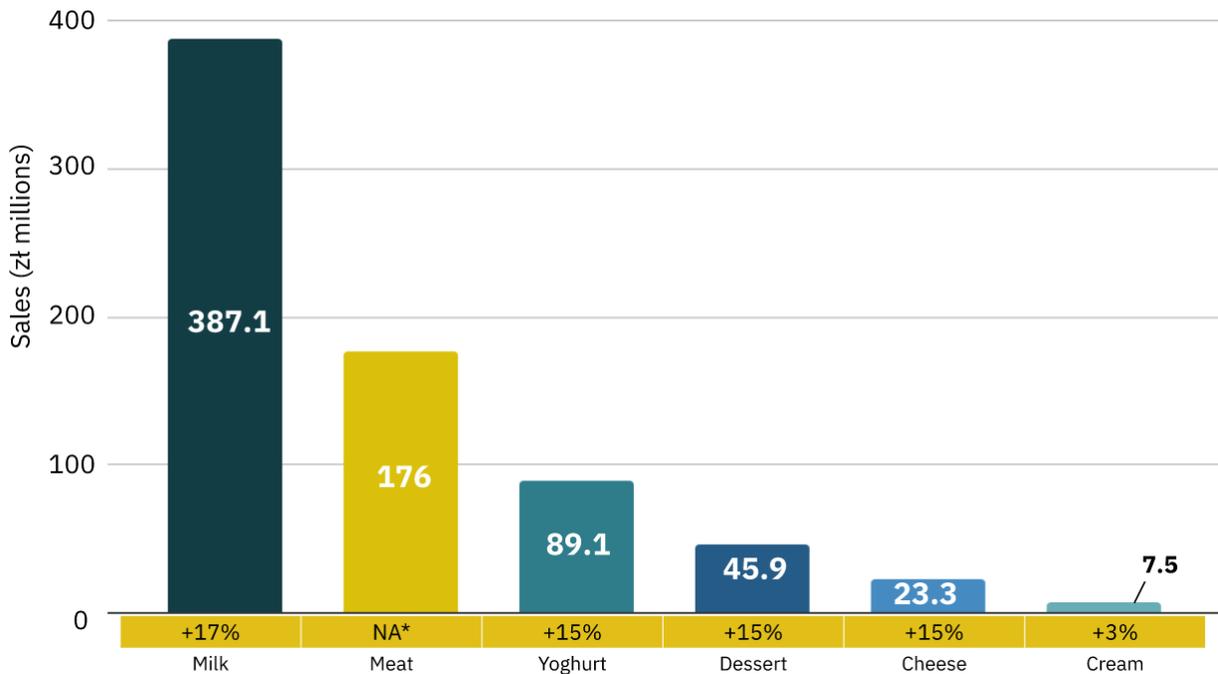


² The 54% increase in sales value in 2022 was driven significantly by the inclusion of the plant-based meat category for the first time in NielsenIQ’s plant-based food retail sales accounting. NielsenIQ did not track plant-based meat sales in 2020 and 2021. If omitting the plant-based meat category, plant-based foods grew 17% between 2020 and 2022.

Categories

Plant-based categories are in various stages of development.

Poland plant-based foods sales by category (in zł millions), 2022



*Nielsen only began tracking plant-based meat in Poland in 2022, so there is no sales growth information available.

Key insights:

- **Plant-based milk is the most developed of all plant-based categories.** Plant-based milk sales were 387.1 million zloty (€82.5 million) in 2022, and the category continued to experience steady growth.
- **Every category grew in 2022.** The fastest-growing categories were plant-based milk, plant-based cheese, plant-based yoghurt, and plant-based dessert – all demonstrating double-digit growth in sales value in 2022.
- **Plant-based categories grow more rapidly than animal-based categories.** Unit sales growth of the plant-based milk, yoghurt, and cheese categories outpaced that of animal-based categories in 2022.

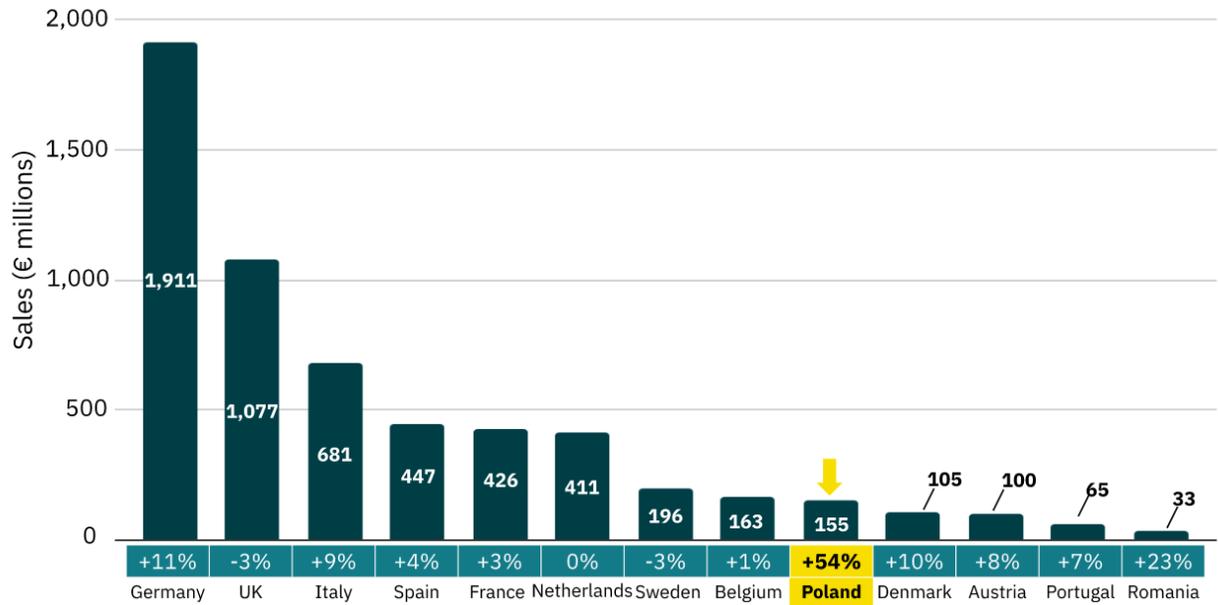
Plant-based category sales summary

	2022 złoty sales	2022 euro sales	Złoty sales growth (21-22)	Złoty sales growth (20-22)	2022 unit sales	Unit sales growth (21-22)	Unit sales growth (20-22)
Milk	387.1 M zł	€82.5 M	17%	41%	55.3 M	21%	39%
Meat	176 M zł	€37.5 M	–	–	25.4 M	–	–
Yoghurt	89.1 M zł	€19.0 M	15%	105%	23.5 M	4%	86%
Dessert	45.9 M zł	€9.8 M	15%	105%	12.1 M	4%	86%
Cheese	23.3 M zł	€5.0 M	15%	–	3.2 M	23%	–
Cream	7.5 M zł	€1.6 M	3%	7%	1.5 M	-11%	-21%
Total	728.9 M zł	€155.4 M	54%	109%	121 M	44%	99%

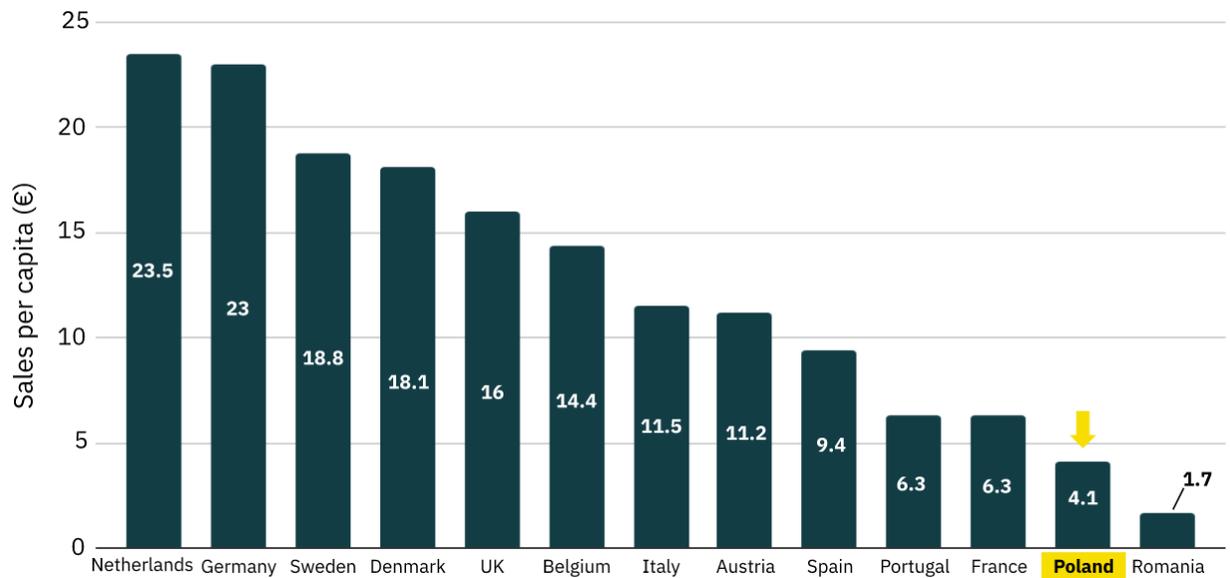
Country comparison

Poland has the ninth highest plant-based food sales value in Europe but ranks 12th for average plant-based food spend per capita.

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

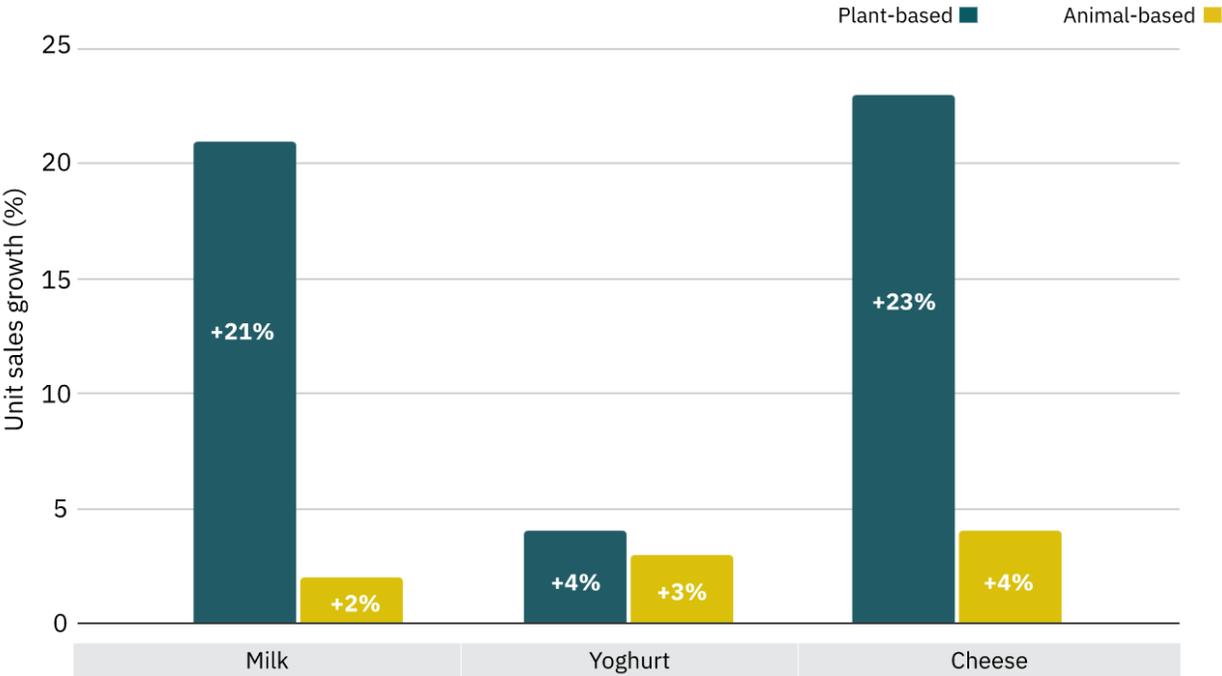


Europe-wide average plant-based food spend per country per capita (in €), 2022



Comparison to animal-based foods

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

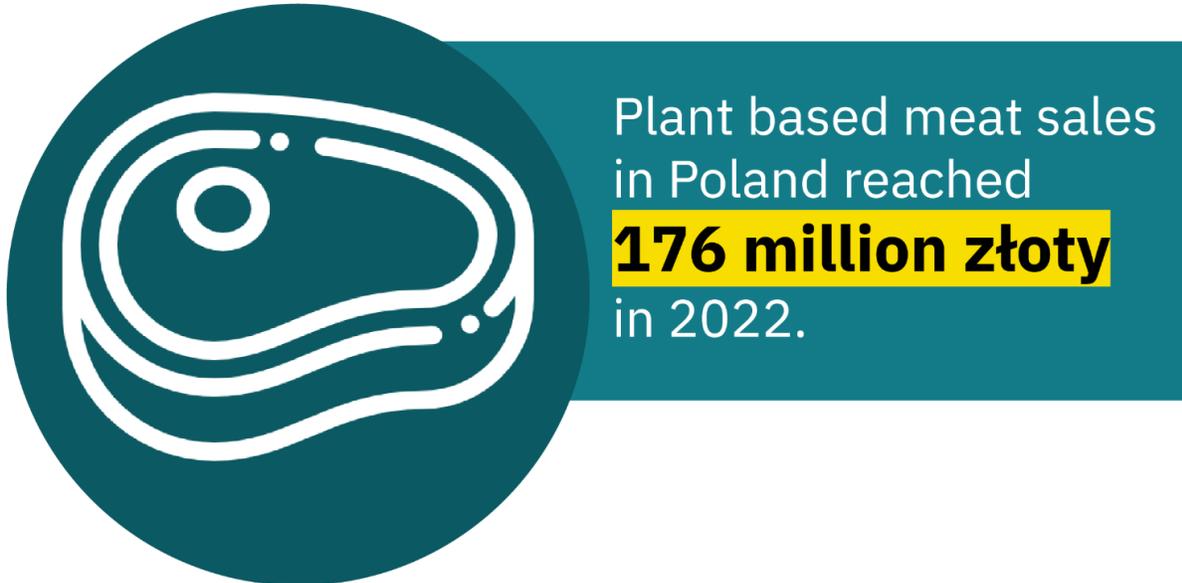


To compare the growth of plant-based versus animal-based categories, we compared unit sales (instead of sales by value) as it provides a more direct comparison. In 2022, unit sales growth of the plant-based milk, yoghurt, and cheese categories outpaced that of animal-based categories.³

³ A comparison for plant-based and animal-based meat is not available as Nielsen only began tracking plant-based meat in Poland in 2022.

Plant-based meat⁴

Poland plant-based meat sales (in zł millions), 2022⁵



Key insights:

- Plant-based meat unit sales in 2022 were 25.4 million and the average price per unit of plant-based meat was 6.94 zloty.
- In 2022, plant-based meat had a 15% market share of the total retail pre-packaged meat category.⁶

Segment insights:

- The most popular plant-based meat formats are processed meat products (e.g. burgers, sausages, mince and nuggets), which make up 79% of sales by value, followed by cold cuts (17%) and pates (4%).

⁴ 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).

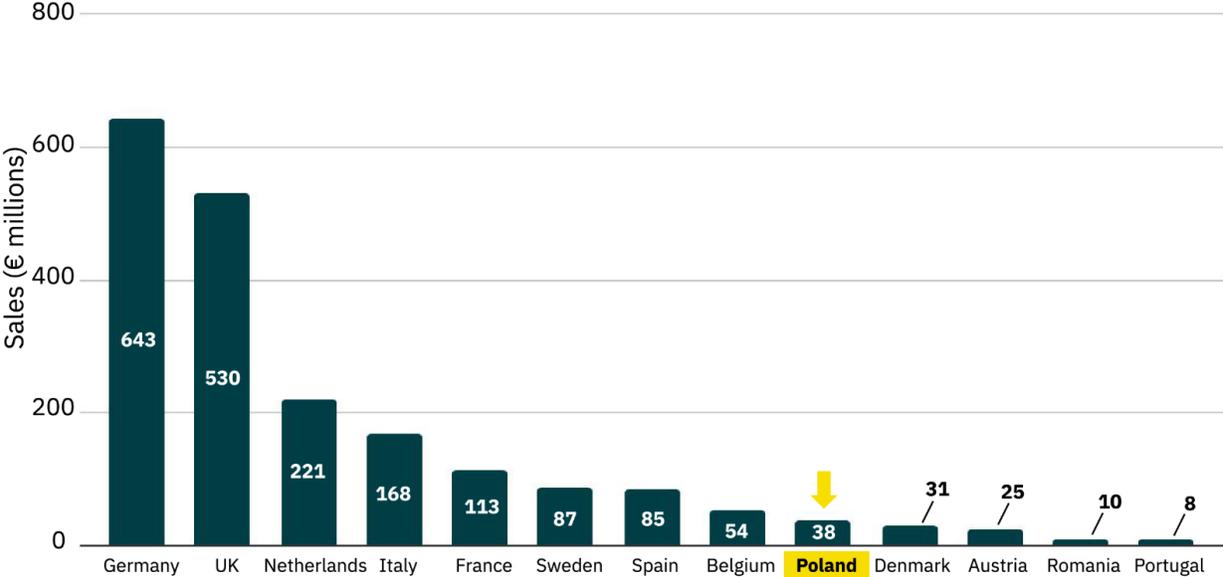
⁵ There is no plant-based meat sales data available before 2022.

⁶ Nielsen only reports on pre-packaged animal-based meat sales, therefore the market share calculation is only for the pre-packaged meat category.

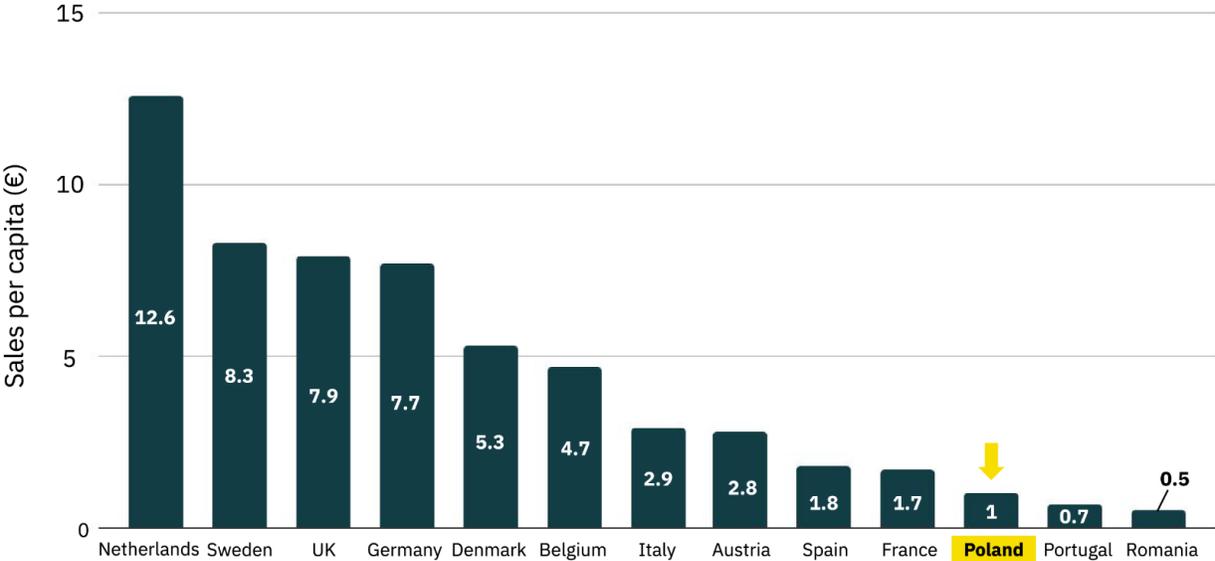
Country comparison

Poland has the ninth highest plant-based meat sales value in Europe but ranks 11th for average plant-based meat spend per capita.

Europe-wide plant-based meat sales per country (in € millions), 2022

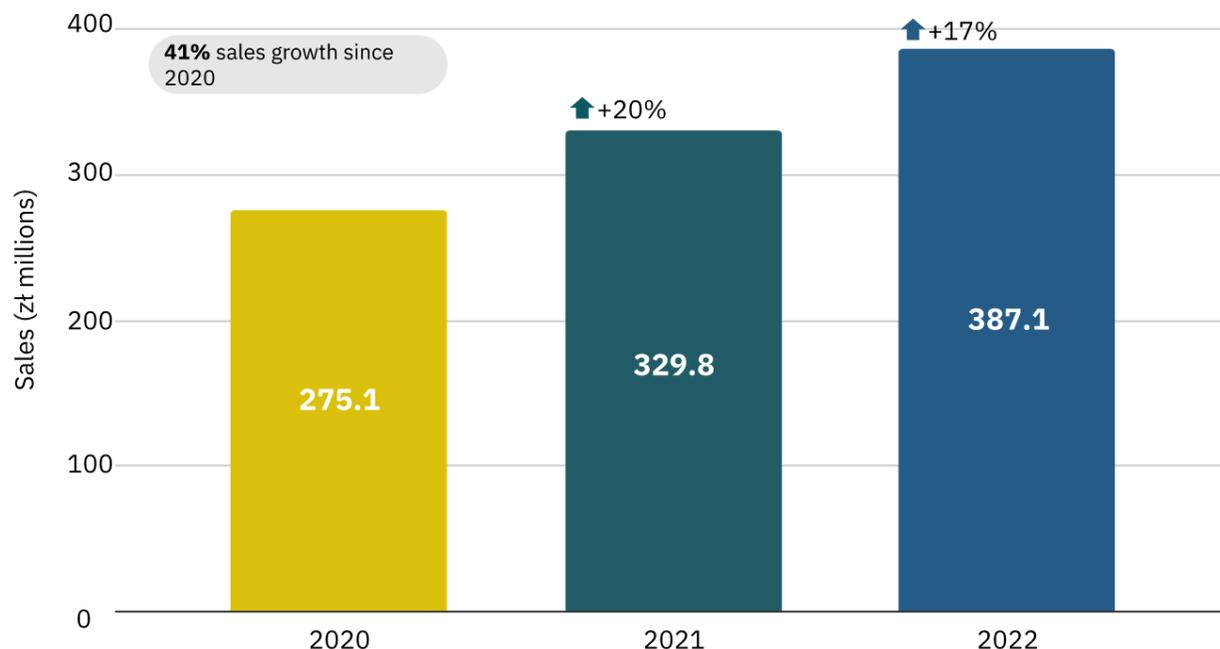


Europe-wide average plant-based meat spend per country per capita (in euros), 2022



Plant-based milk

Poland plant-based milk sales (in zł millions), 2020-2022



Key insights:

- The value of plant-based milk sales increased by 41% between 2020 and 2022, and unit sales increased by 39%.
- In comparison, conventional milk unit sales decreased by 1% 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 actually decreased by 3%, whereas conventional milk prices increased by 27%.
- In 2022, plant-based milk had a 10% market share of the total milk category.

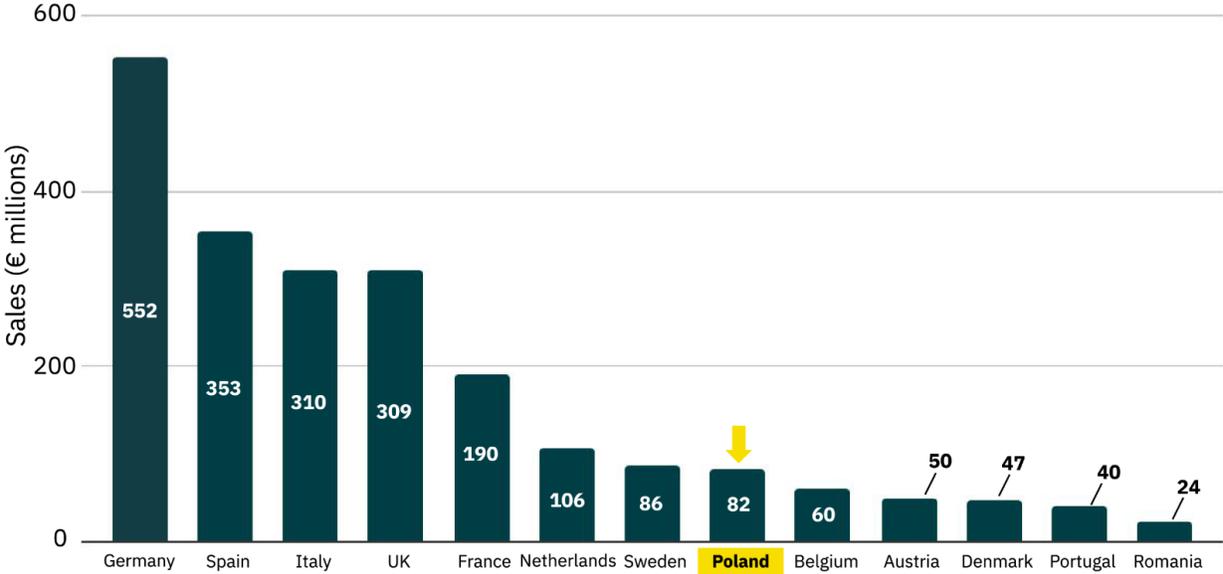
Segment insights:

- Plain plant-based milk makes up the majority of category sales by value in 2022 (93%), and flavoured milk makes up the rest (7%).

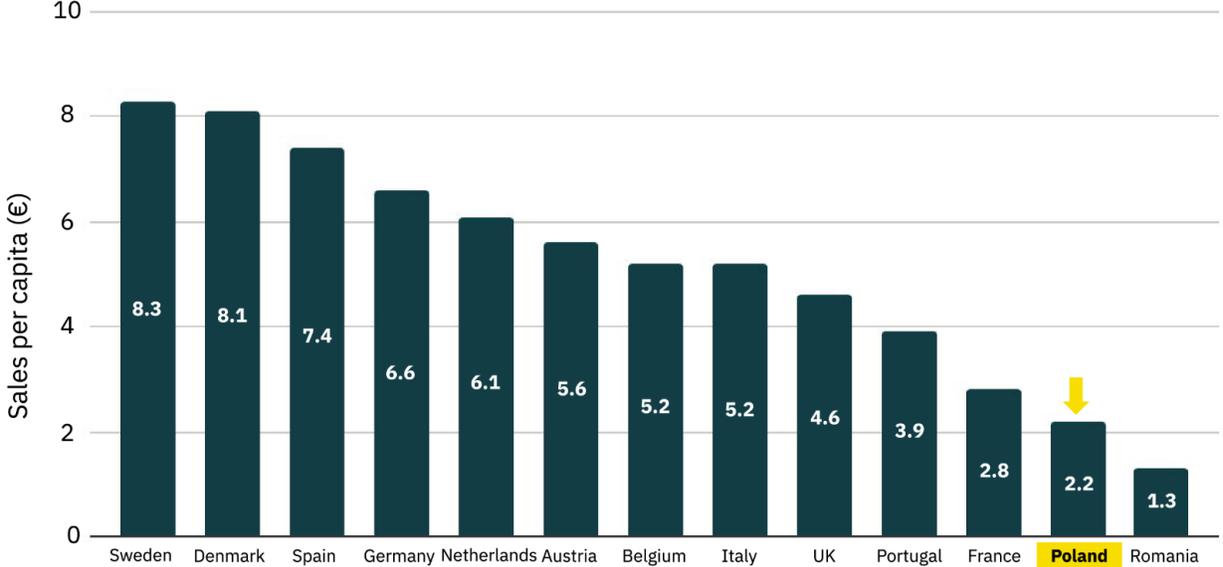
Country comparison

Poland has the eighth highest plant-based milk sales value in Europe but ranks 12th for average plant-based milk spend per capita.

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

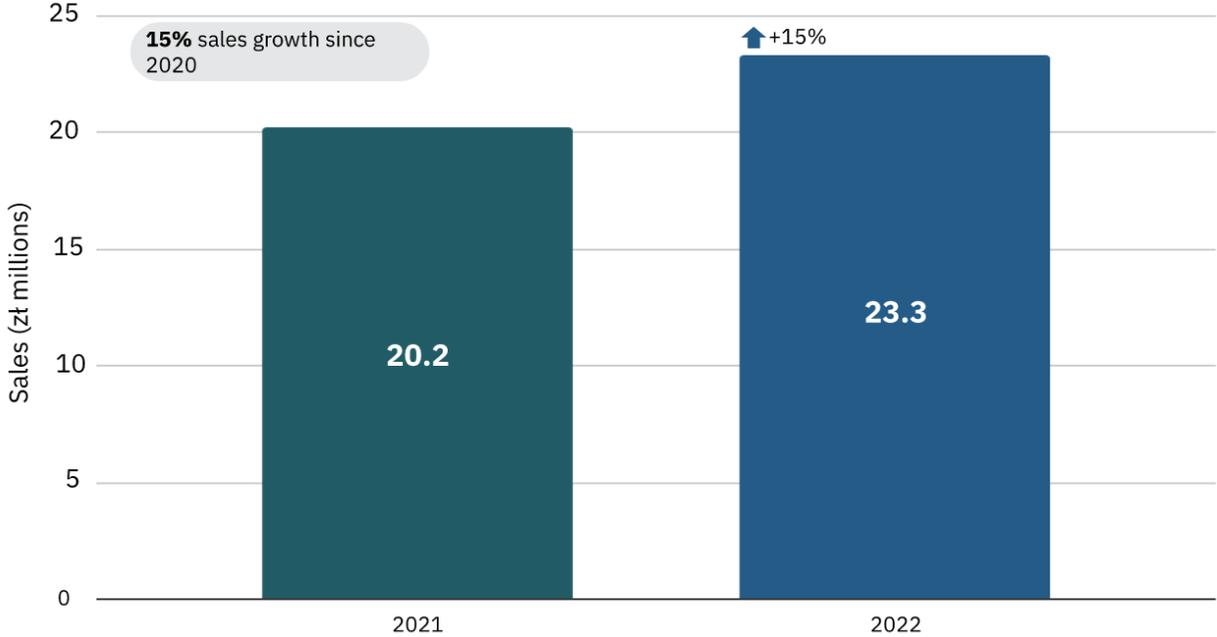


Average plant-based milk spend per country per capita (in euros), 2022



Plant-based cheese

Poland plant-based cheese sales (in zł millions), 2021-2022⁷



Key insights:

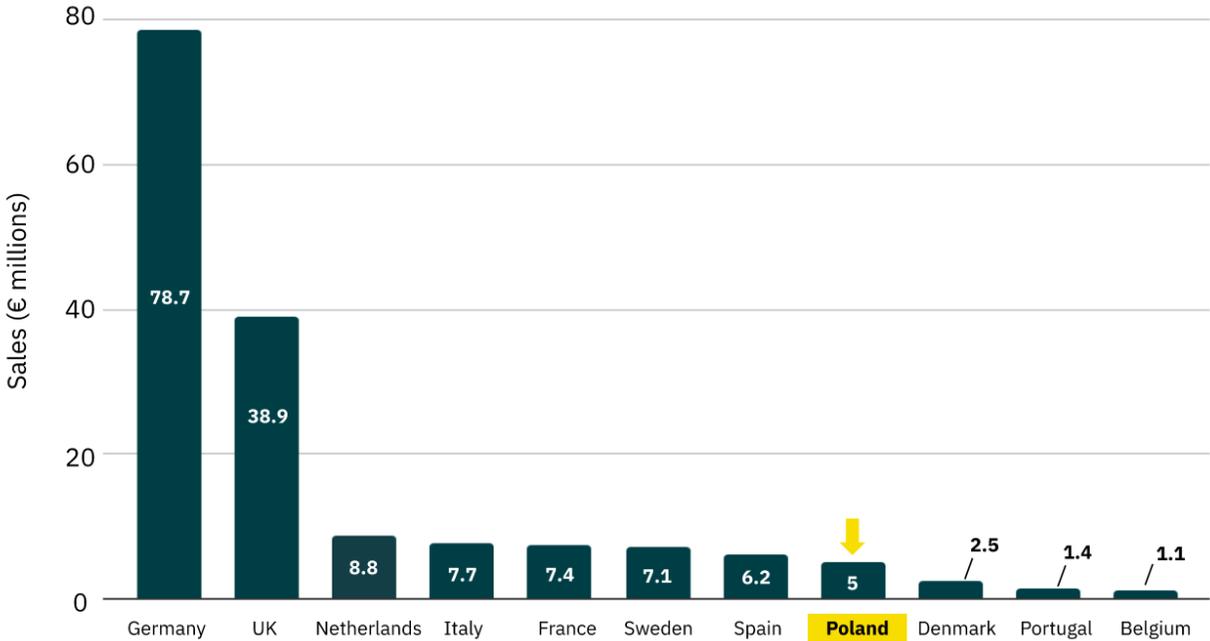
- The value of plant-based cheese sales grew by 15% between 2021 and 2022, and unit sales increased by 23%.
- In comparison, conventional cheese unit sales grew by 4% between 2021 and 2022.
- In terms of average price per unit, the plant-based cheese category was less impacted by inflation and price increases in 2022. Plant-based cheese prices actually decreased by 6%, whereas conventional cheese prices increased by 20%.
- In 2022, plant-based cheese had a 0.3% market share of the total cheese category.

⁷ No plant-based cheese sales data available for 2020.

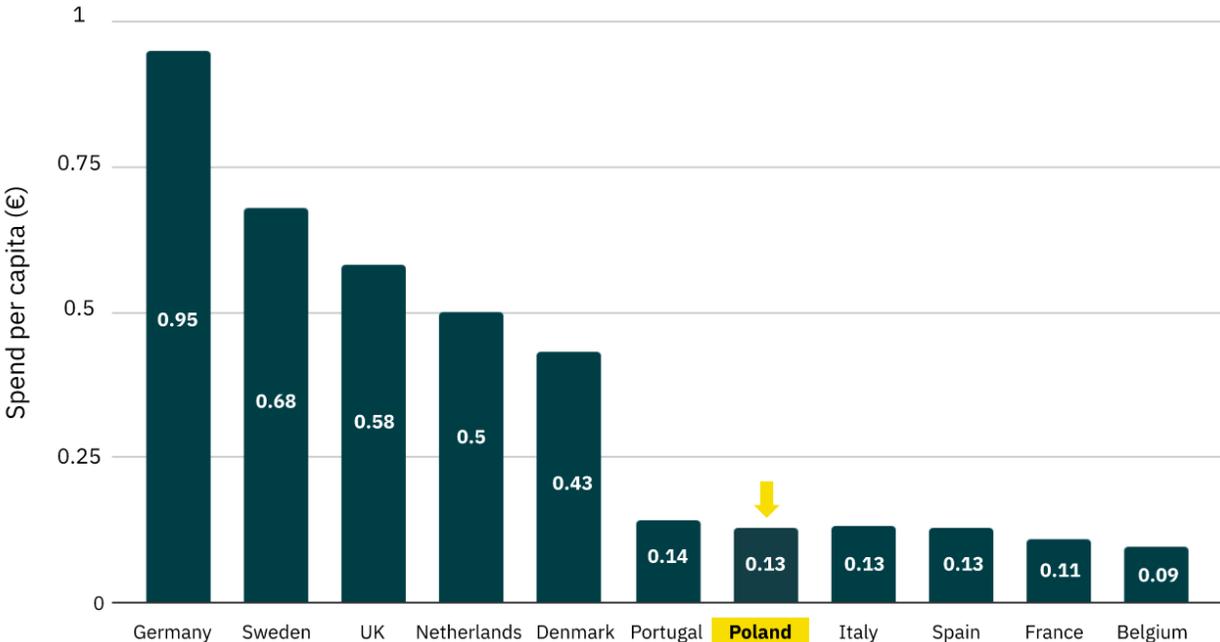
Country comparison

Poland has the eighth highest plant-based cheese sales value in Europe and ranks seventh for average plant-based cheese spend per capita.

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

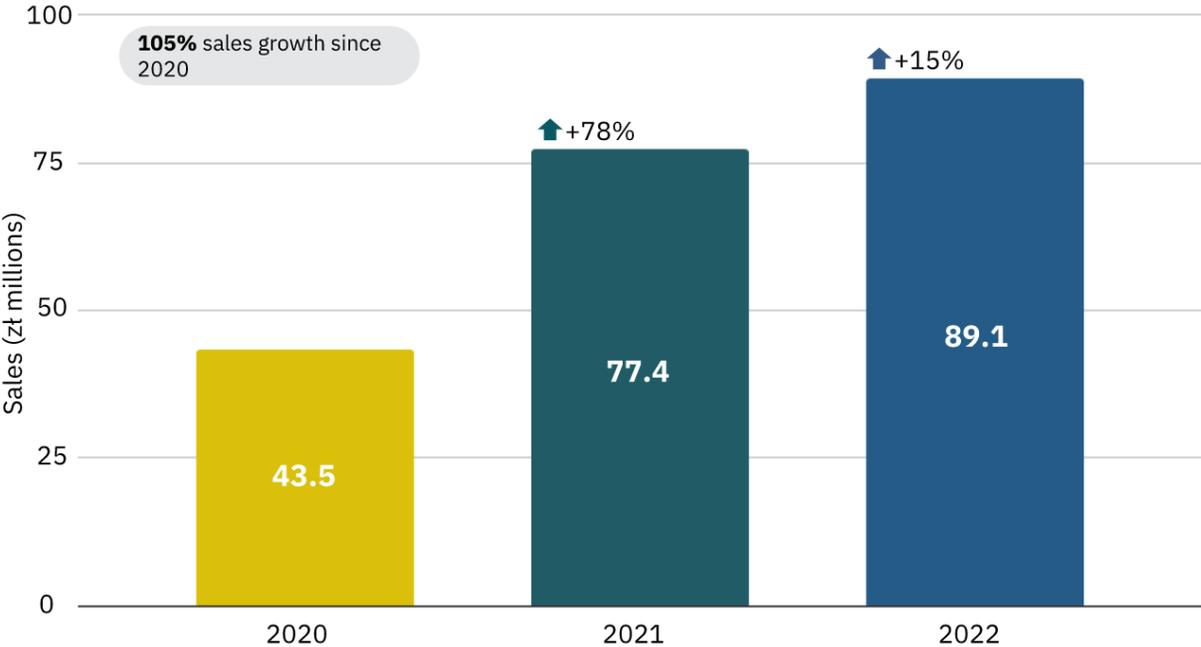


Average plant-based cheese spend per country per capita (in euros), 2022



Plant-based yoghurt

Poland plant-based yoghurt sales (in zł millions), 2020-2022



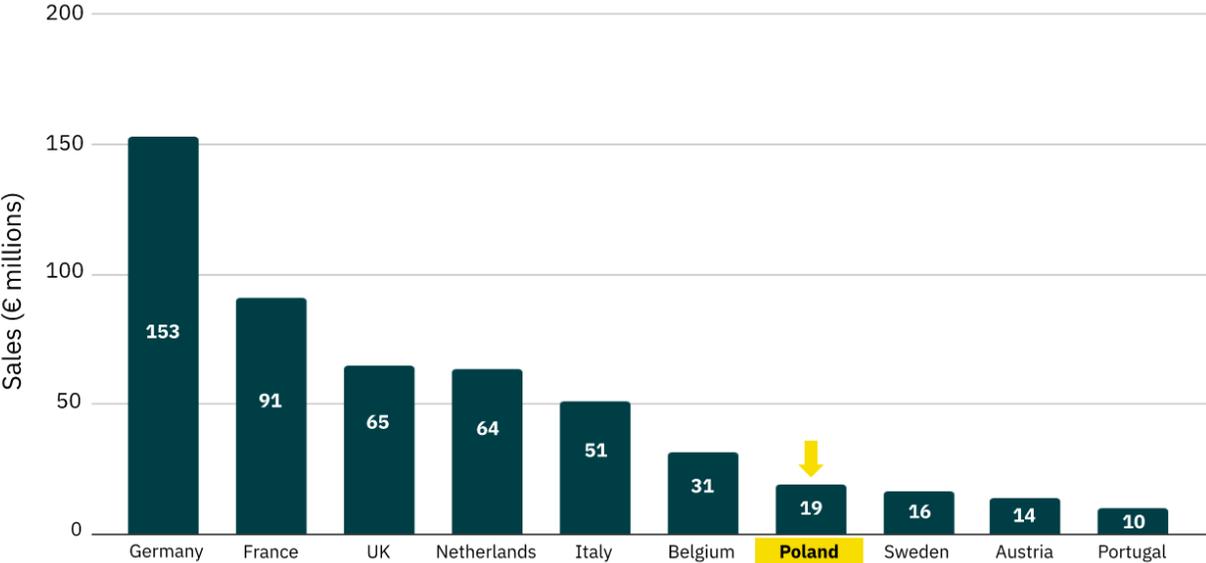
Key insights:

- The value of plant-based yoghurt sales grew by 105% between 2020 and 2022, almost four times much as conventional yoghurt.
- While plant-based yoghurt unit sales also grew by 86% between 2020 and 2022, conventional yoghurt unit sales grew by 3%.
- The average price per unit of plant-based and conventional yoghurt in 2022 increased by 10% and 16% respectively.
- In 2022, plant-based yoghurt had a 3% market share of the total yoghurt category.

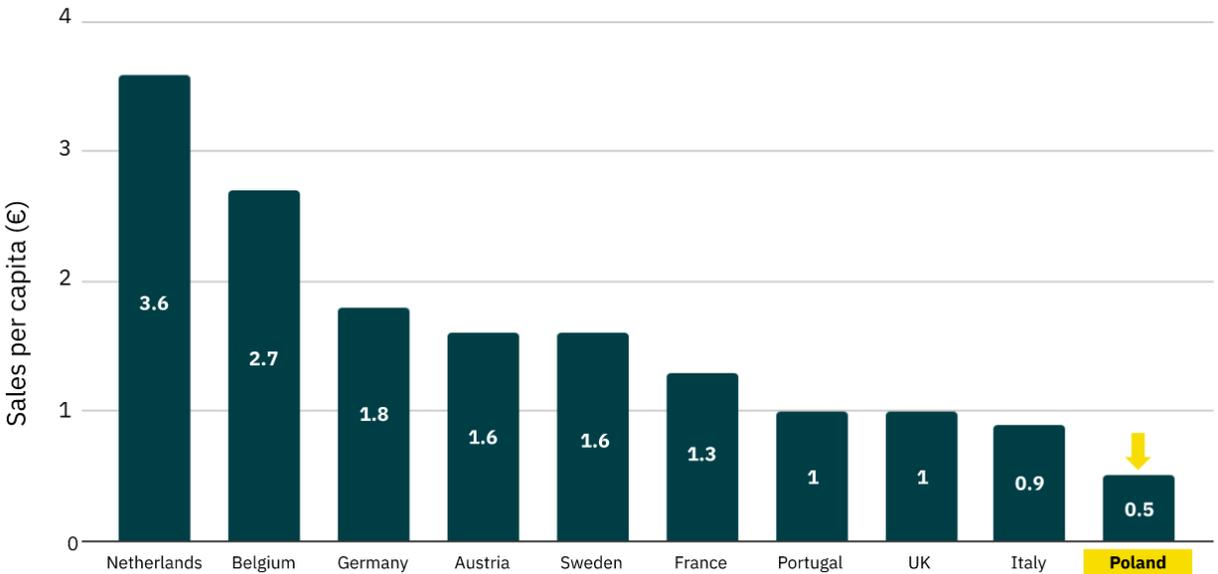
Country comparison

Poland has the seventh highest plant-based yoghurt sales value in Europe and ranks last for average plant-based yoghurt spend per capita.

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

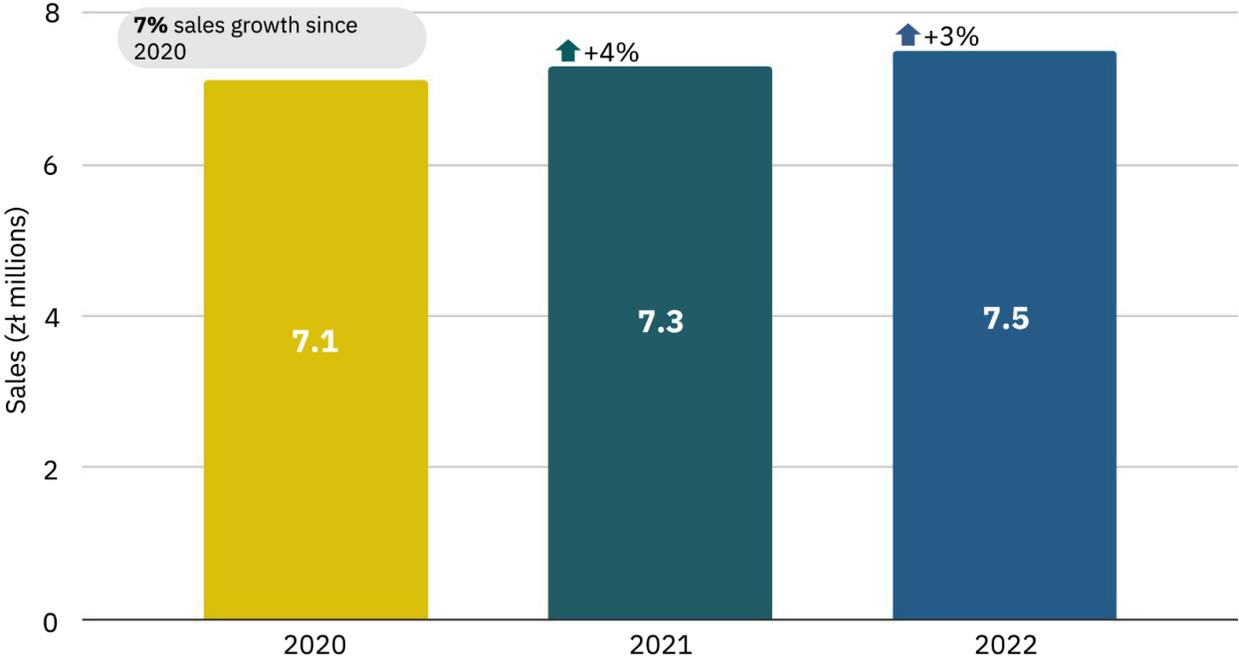


Average plant-based yoghurt spend per country per capita (in euros), 2022



Plant-based cream

Poland plant-based cream sales (in zł millions), 2020-2022

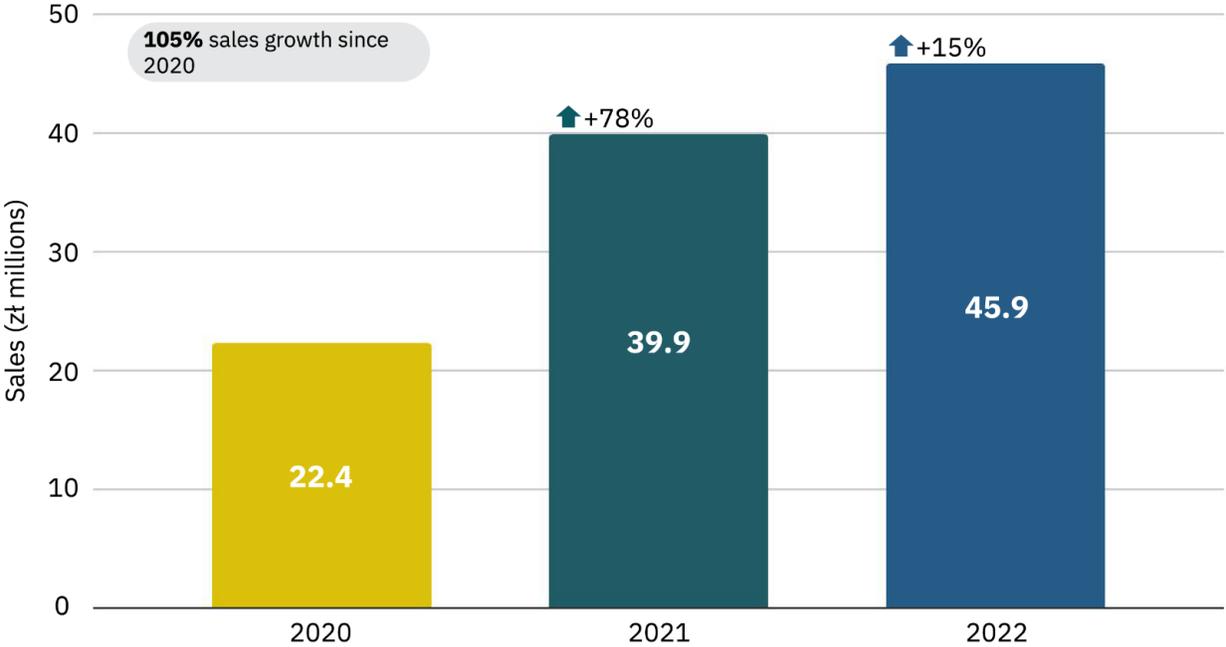


Key insights:

- The value of plant-based cream sales grew by 7% between 2020 and 2022.
- Plant-based cream unit sales decreased by 21% between 2020 and 2022.
- The average price per unit of plant-based cream in 2022 increased by 15%.

Plant-based dessert⁸

Poland plant-based dessert sales (in zł millions), 2020-2022



Key insights:

- The value of plant-based dessert sales grew by 105% between 2020 and 2022.
- Plant-based dessert unit sales grew by 86% between 2020 and 2022.
- The average price per unit of plant-based dessert in 2022 increased by 10%.

⁸ 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.”

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



About the data

To size the Polish 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 Poland 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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