

Spain 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	+6%	+4%	21%
The retail market for plant-based foods is worth €5.8 billion, up from €4.8 billion in 2020.	The value of plant-based food sales grew by 6% between 2021 and 2022.	Plant-based food unit sales grew by 4% between 2021 and 2022.	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 Spain are a €447.4 million market.

The Spanish plant-based food retail market is the fourth largest market in Europe, and sales continue to grow – increasing by 9% between 2020 and 2022 to €447.4 million.

Plant-based milk is Spain's most developed category, and experienced steady growth between 2020 and 2022. The value of plant-based meat sales declined in 2022, although the category still saw 25% growth 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 Spanish 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 cheese country comparison charts have been updated with the correct sales figures.

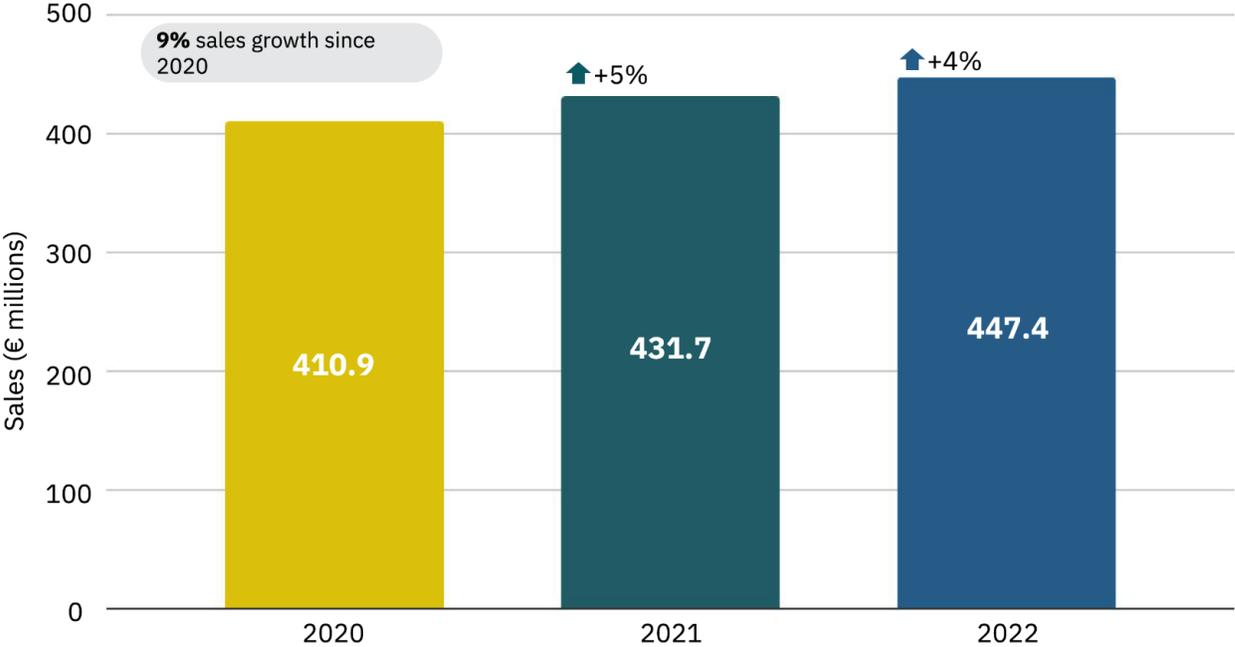
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Overall plant-based food market

Plant-based food sales in Spain grew by 4% in 2022 to reach €447.4 million.

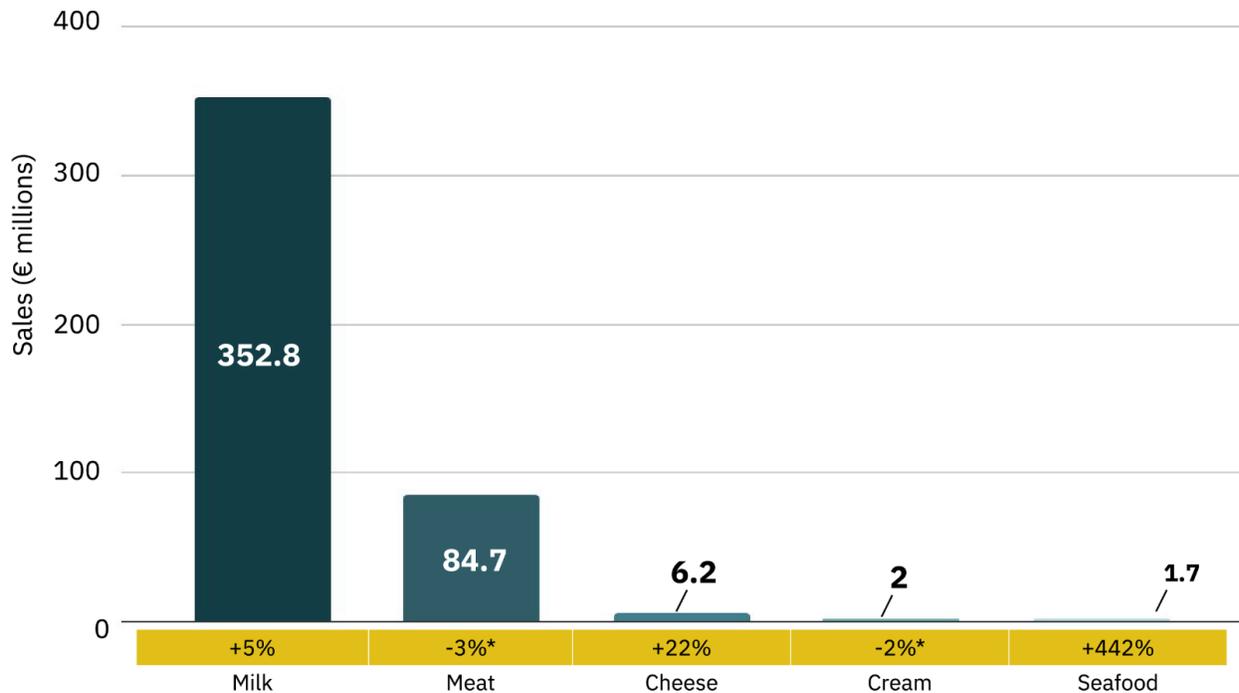
Spain plant-based foods sales (in € millions), 2020-2022



Categories

Plant-based categories are in various stages of development.

Spain 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 €352.8 million in 2022, and the category continues to experience steady growth.
- **The value of plant-based meat sales declined in 2022** to €84.7 million, although the category has still seen 25% growth between 2020 and 2022.
- **One of the least developed categories, but 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 6,430% growth since 2020.

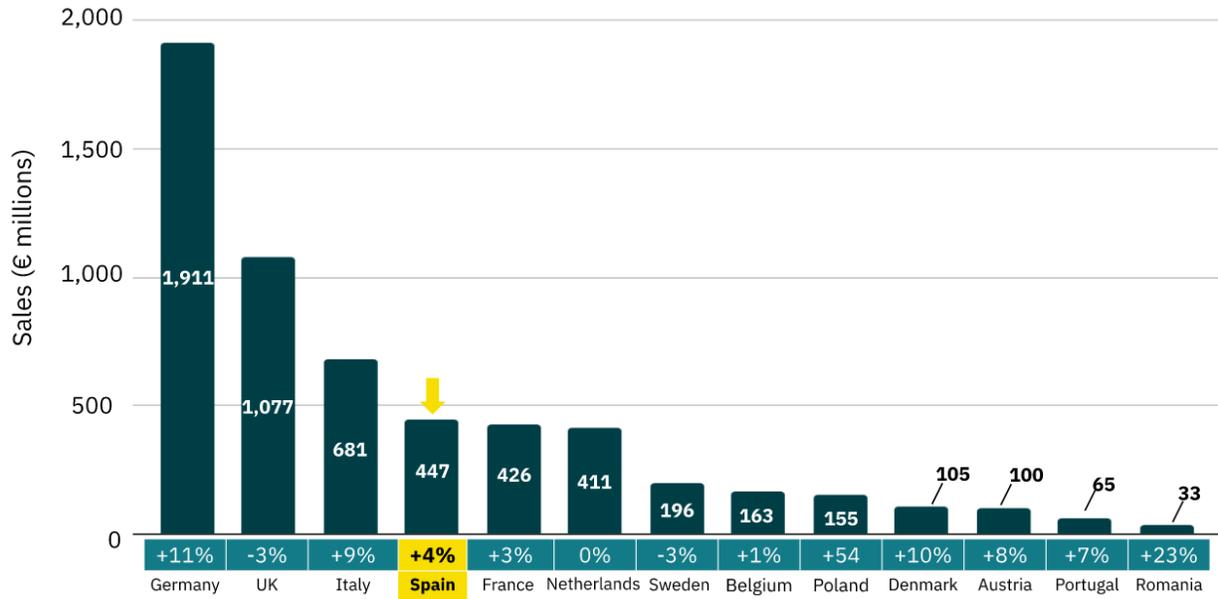
Spain plant-based category sales summary, 2022

	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	€352.8 M	5%	4%	229.1 M	4%	7%
Meat	€84.7 M	-3%	25%	29.9 M	-8%	13%
Cheese	€6.2 M	22%	125%	2.2 M	26%	150%
Cream	€2.0 M	-2%	3%	1.8 M	-3%	3%
Seafood	€1.7 M	442%	6,430%	0.4 M	350%	10,700%
Total	€447.4 M	4%	9%	263.4 M	3%	9%

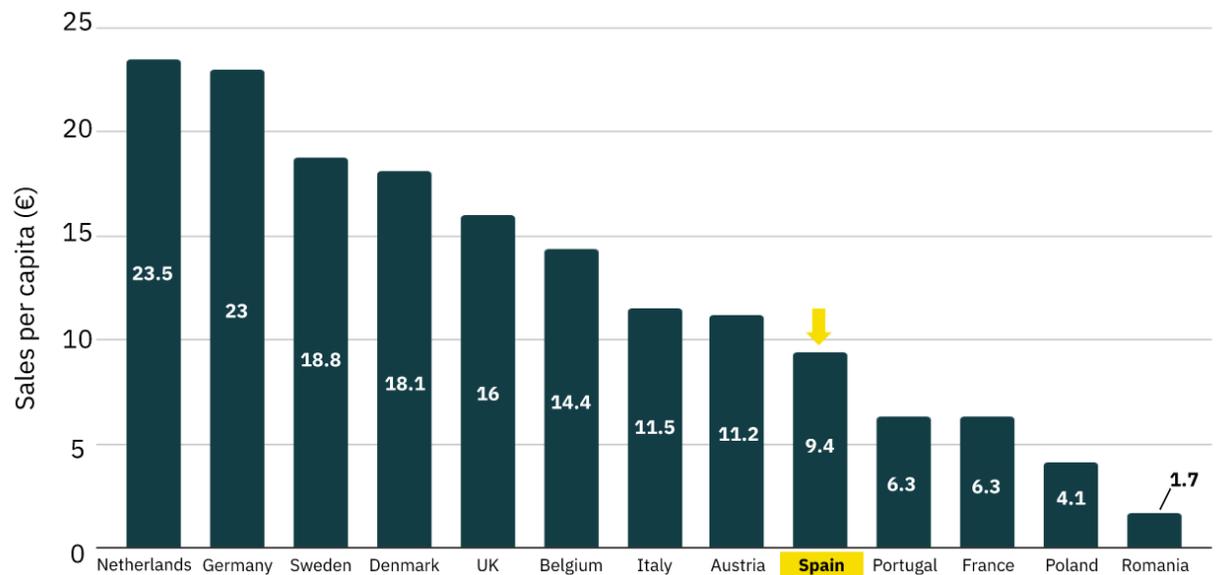
Country comparison

Spain has the fourth highest plant-based food sales value in Europe. However, in terms of average plant-based food spend per capita, Spain ranks ninth.

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

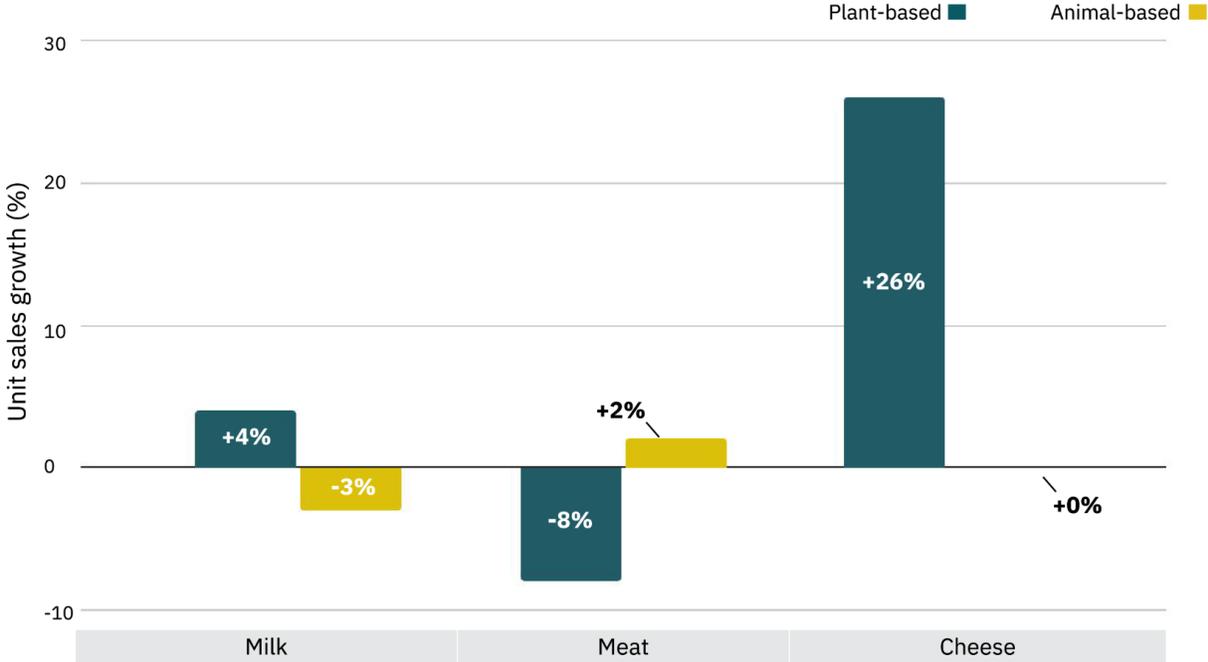


Europe-wide average plant-based food spend per country per capita (in €), 2022



Comparison to animal-based foods

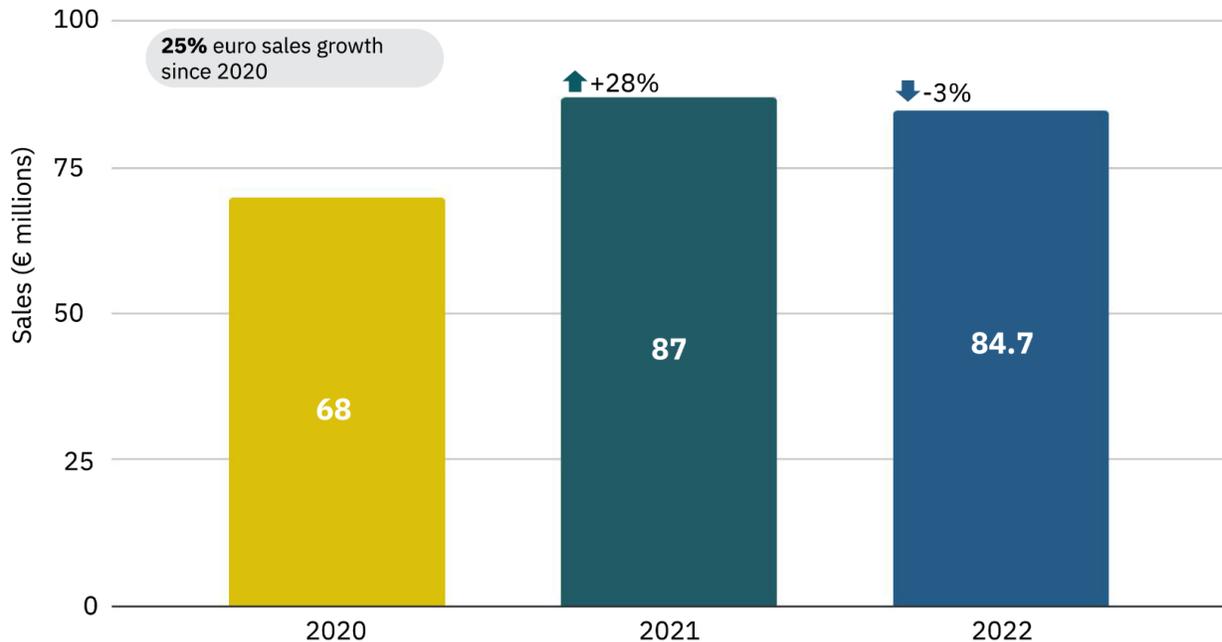
Spain plant-based vs animal-based category unit sales growth, 2022



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 and cheese categories outpaced that of animal-based categories.

Plant-based meat¹

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



Key insights:

- The value of plant-based meat sales grew by 25% between 2020 and 2022, while unit sales for plant-based meat went up by 13%.
- In comparison, pre-packaged conventional meat unit sales increased by 3% 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 5%, whereas pre-packaged conventional meat prices increased by 10%.
- In 2022, plant-based meat had a 10% market share of the total retail pre-packaged meat category.²

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.

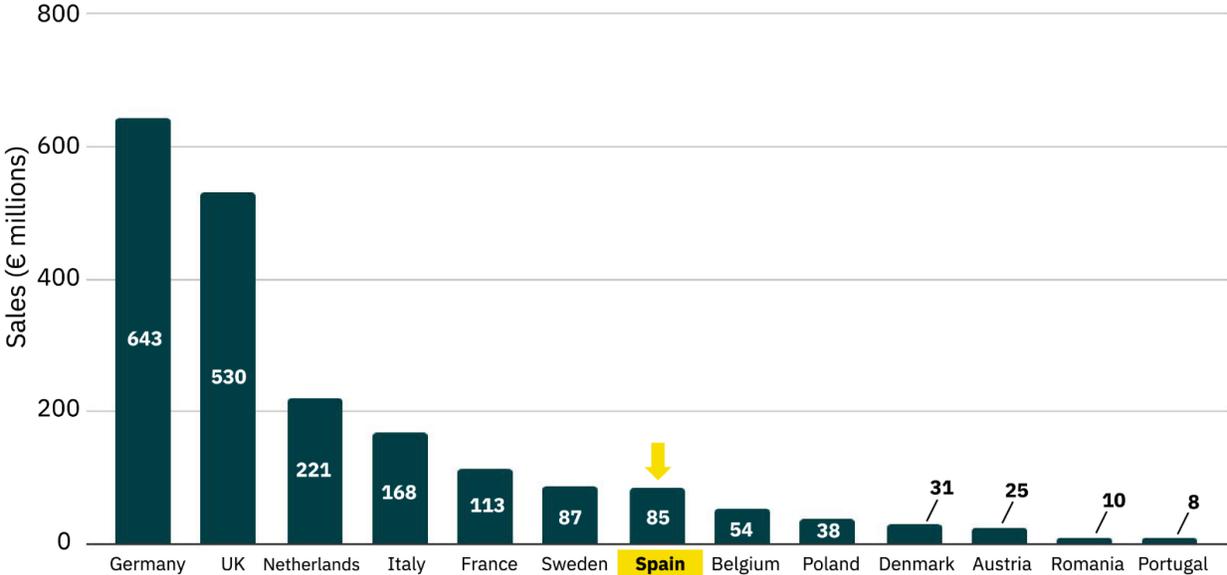
Segment insights:

- Refrigerated plant-based meat made up the majority of the category by sales value in 2022, representing 91% of total plant-based meat sales, whereas frozen and shelf-stable plant-based meat made up 8% and 1% respectively.
- The most popular plant-based meat formats are burgers (making up 37% of euro sales), followed by strips (18%) and fillet/breaded options (14%). Whereas most formats experienced growth in sales value, burgers have declined over the past two years likely due to the introduction of new formats.

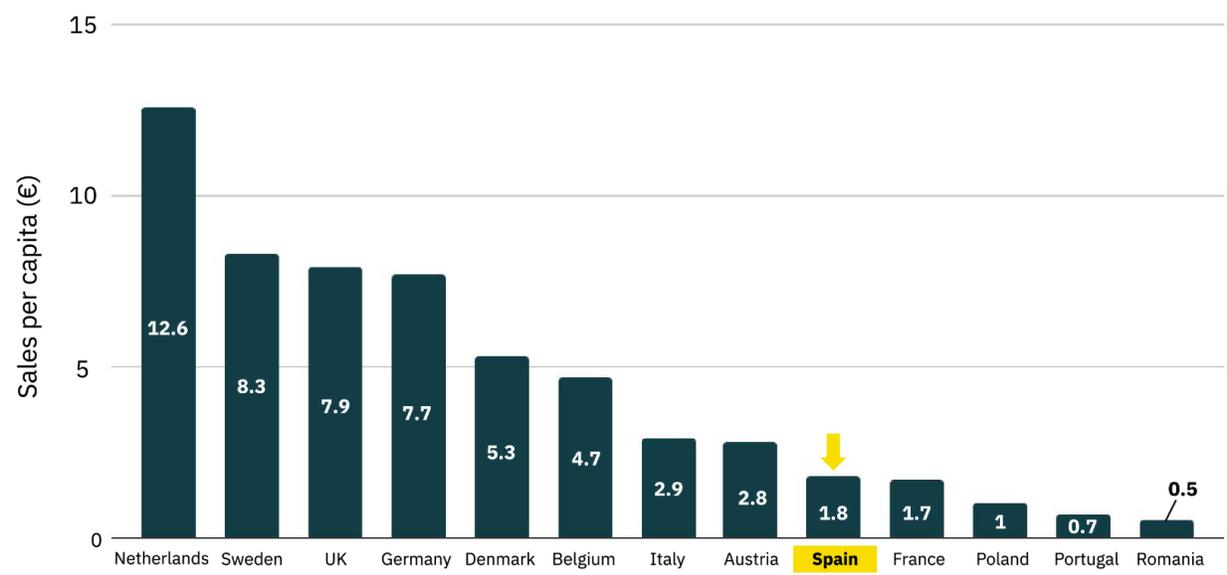
Country comparison

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

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

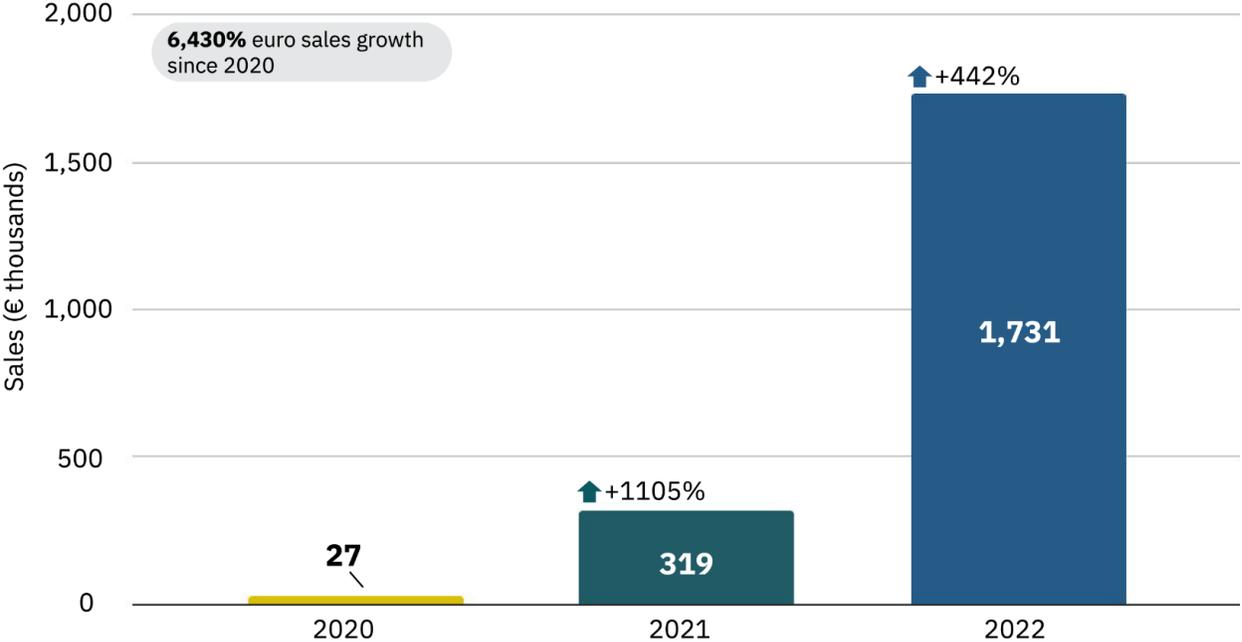


Average plant-based meat spend per country per capita (in euros), 2022



Plant-based seafood

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

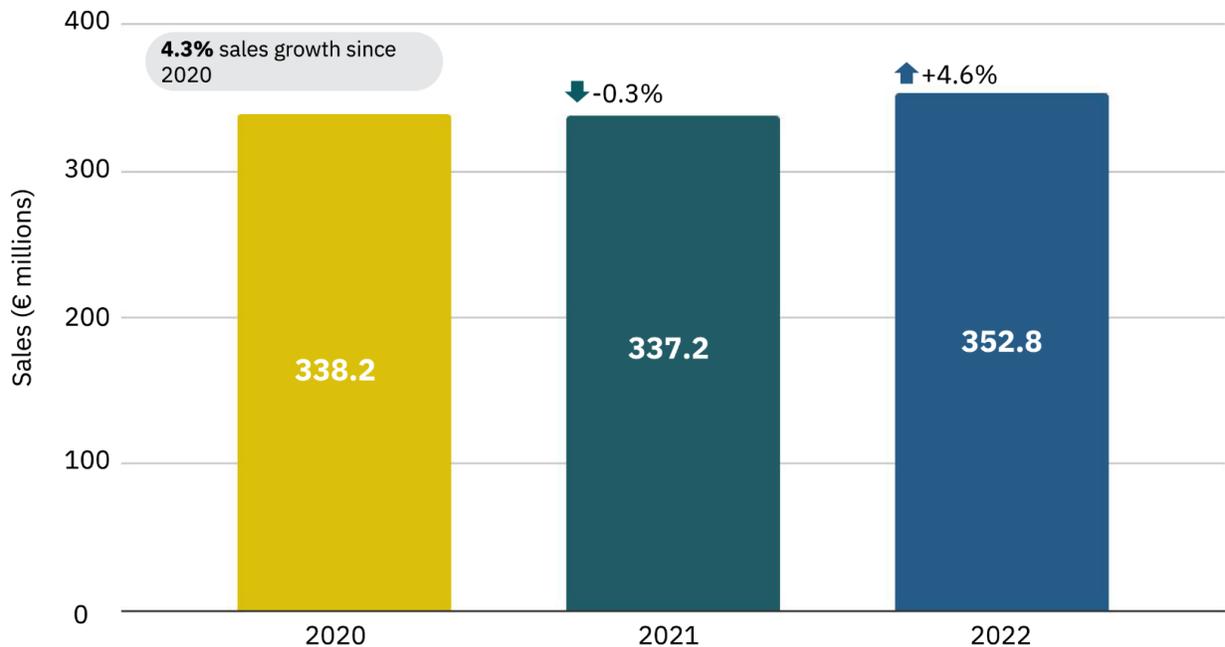


Key insights:

- The value of plant-based seafood sales grew by a tremendous 6,430% between 2020 and 2022.
- Plant-based seafood unit sales grew by 10,700% between 2020 and 2022.
- The average price per unit of plant-based seafood in 2022 increased by 20%.

Plant-based milk

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



Key insights:

- The value of plant-based milk sales increased by 4% between 2020 and 2022, and unit sales increased by 7%.
- In comparison, conventional milk unit sales decreased by 8% 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 0.4%, whereas conventional milk prices increased by 20%.
- In 2022, plant-based milk had an 11% market share of the total milk category.

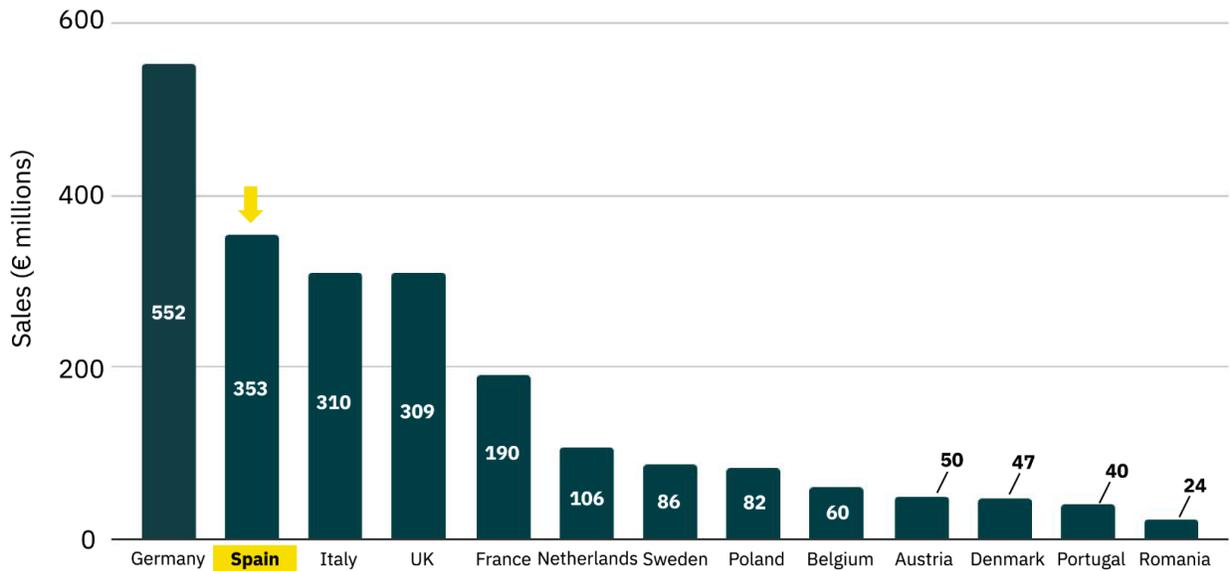
Segment insights:

- Plain plant-based milk makes up the majority of category sales value in 2022 (98%), and flavoured milk makes up the rest (2%).

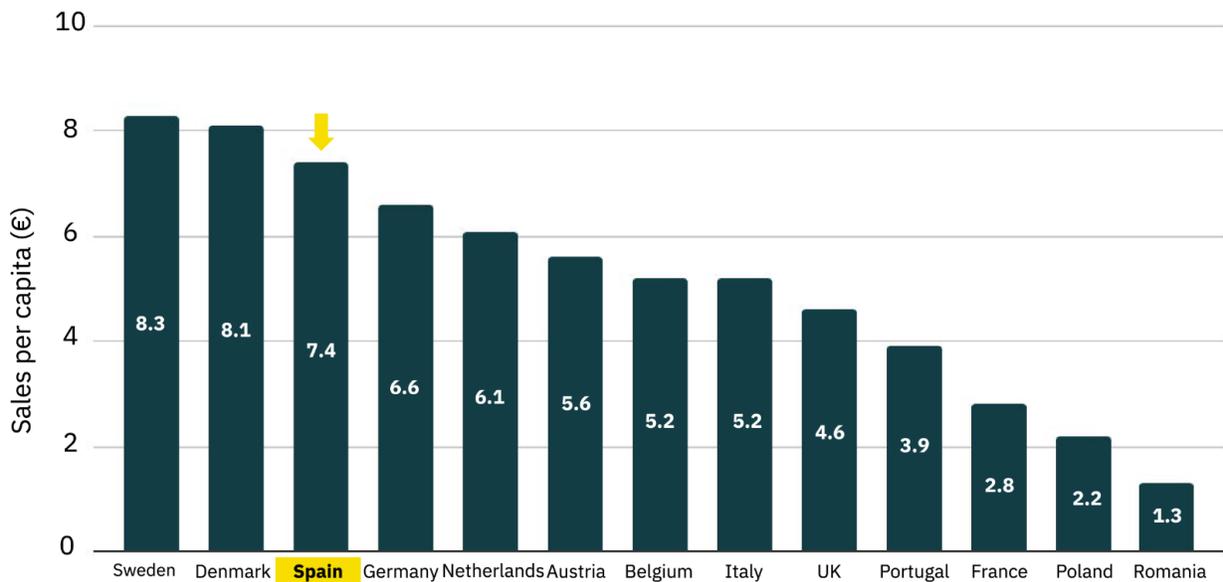
Country comparison

Spain has the second highest plant-based milk sales value and third highest average plant-based milk spend per capita in Europe.

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

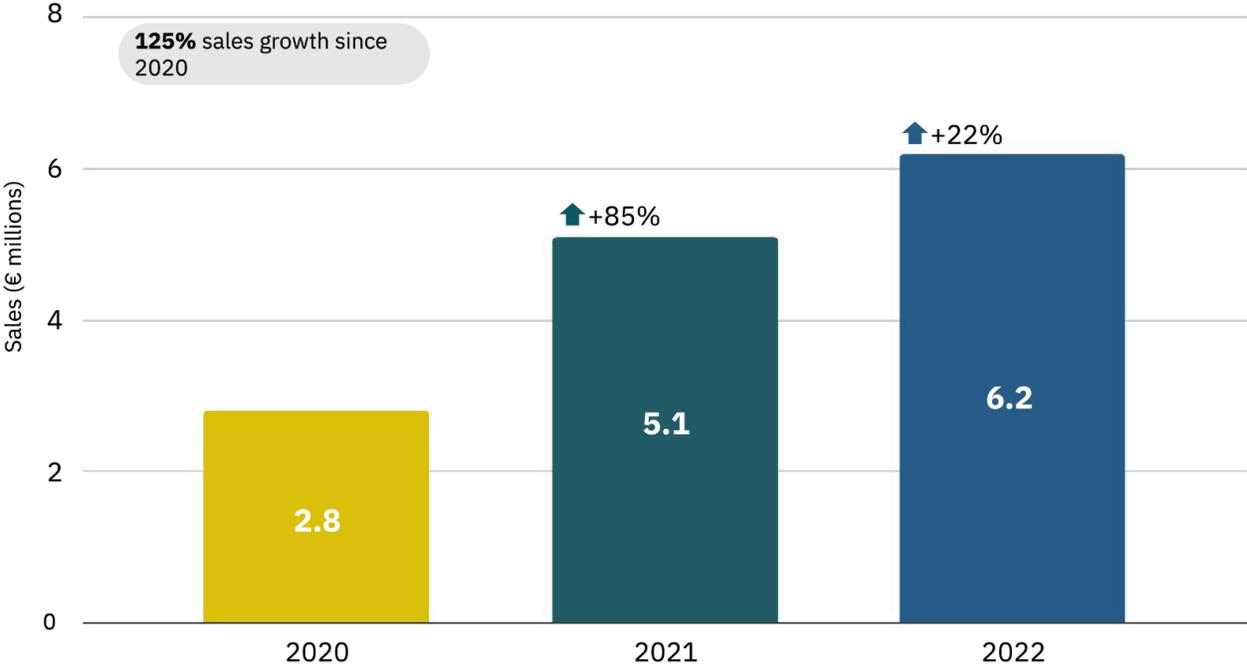


Average plant-based milk spend per country per capita (in euros), 2022



Plant-based cheese

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



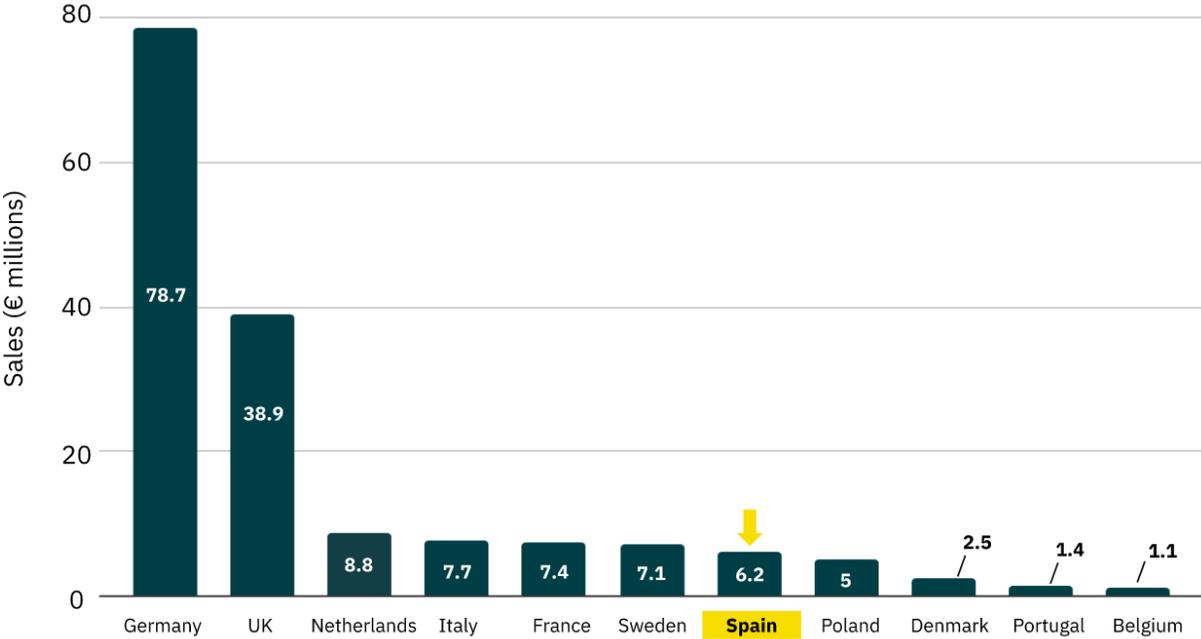
Key insights:

- The value of plant-based cheese sales grew 125% between 2020 and 2022, and unit sales increased by 150%.
- In comparison, conventional cheese unit sales decreased by 0.2% between 2020 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 3%, whereas conventional cheese prices increased by 12%.
- In 2022, plant-based cheese had a 0.3% market share of the total cheese category.

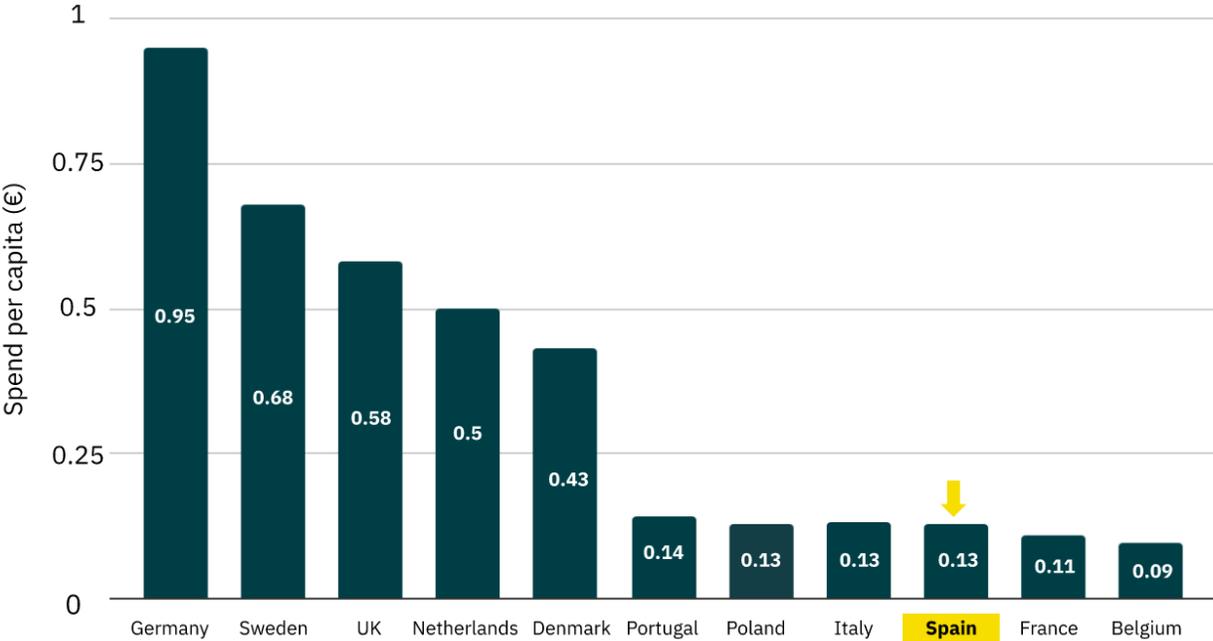
Country comparison

Spain ranks seventh in terms of plant-based cheese sales value and ninth in spend per capita in Europe.

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

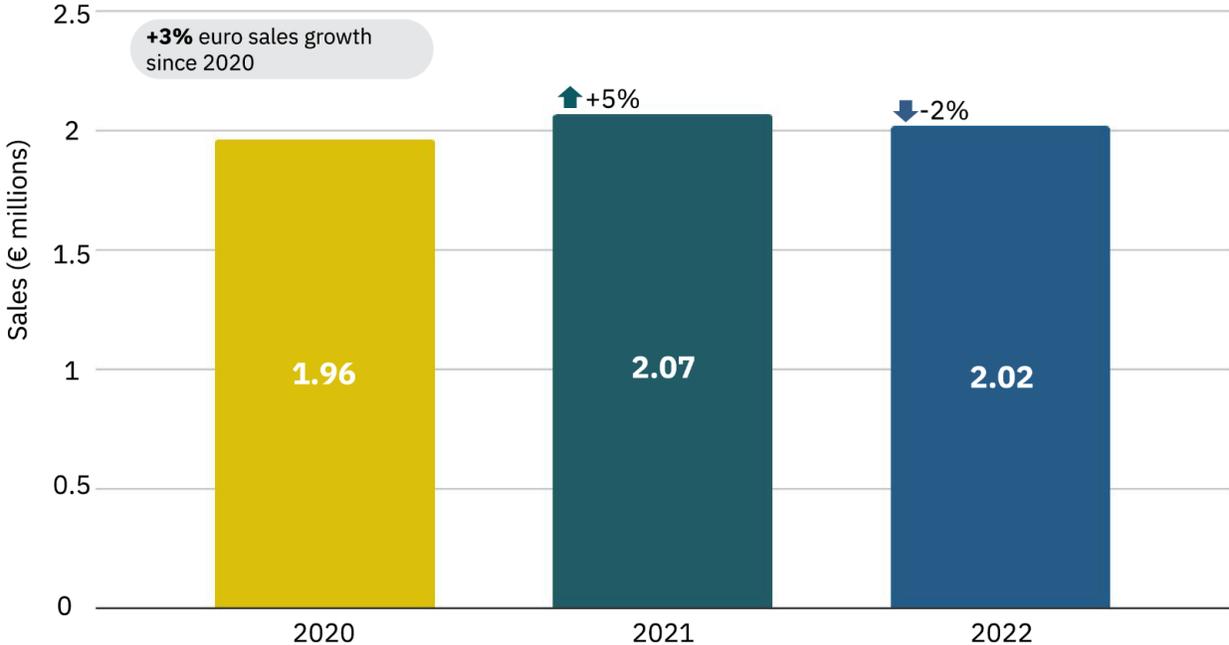


Average plant-based cheese spend per country per capita (in euros), 2022



Plant-based cream

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



Key insights:

- The value of plant-based cream sales and unit sales grew 3% between 2020 and 2022.
- The average price per unit of plant-based cream in 2022 increased by 0.5%.

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 Spanish 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 Spain 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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