Alternative protein: Plant-based | Region: Italy | June 2025

2022 to 2024

Italy plant-based food retail market insights

Meat, milk and drinks, cheese, yoghurt and cream.

Image credit: Vegfather

gfi / Europe

Executive summary

This report shows the trends in retail sales across five plant-based product categories (meat, milk and drinks, cheese, yoghurt and cream) in Italy between 2022 and 2024, based on data from Circana.

The Italian retail market across **five categories** of plant-based food was valued at **€639 million in 2024**.	The total annual sales **value** of plant-based foods across five categories in Italy **grew by 16%** between 2022 and 2024.	Total annual sales **volume** across five categories of plant-based foods in Italy **grew by 6.9%** between 2022 and 2024.

Sales across five plant-based categories totalled €639 million in 2024 – an increase of 16.4% compared with 2022 and an increase of 7.6% compared with 2023. This rise in sales value was partly driven by inflation, which occurred mostly between 2022 and 2023, with prices of many plant-based categories falling slightly between 2023 and 2024. Indeed, data shows that inflation across Italy's whole food sector was high between October 2022 and March 2023 but has since fallen.

The inflationary environment could explain the strong growth of relatively affordable private-label products, which saw a 17.4% increase in sales volume between 2022 and 2024, compared to steady sales volume (-1.5%) for branded options. However, sales patterns suggest that other factors such as taste and texture are likely to be important too, with lower prices not always guaranteeing higher sales.

Demand for plant-based food has continued to rise, with total unit sales across the five categories increasing by 10.0% between 2023 and 2024, and by 13.6% between 2022 and 2024. Sales volume rose by 6.9% between 2022 and 2024 – with 6.5% growth between 2023 and 2024 alone.

From 2023 to 2024, sales volume grew in three out of five plant-based categories (meat, milk and drinks, and cheese). Sales volume was level for plant-based yoghurt, and decreased for plant-based cream, while sales value grew for all categories except cream.

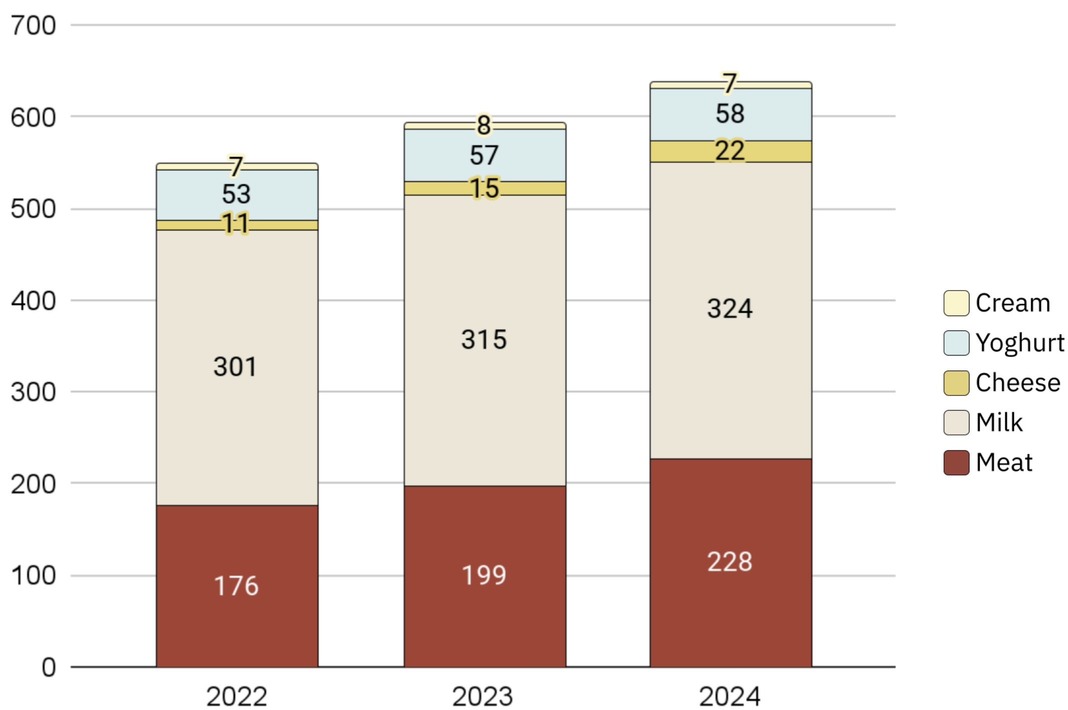
Plant-based cheese continued its strong growth trajectory as an emerging category, seeing a 44.6% increase in sales value between 2023 and 2024 and doubling since 2022.

Plant-based meat also saw strong growth between 2023 and 2024, with its sales value rising by 14.7% and sales volume increasing by 16.0%. Its growth accelerated between 2023 and 2024.

Overview of plant-based food sales by category in Italy, 2022-2024

	Sales value			Unit sales			Sales volume		
	2024, € millions	2023-24 change	2022-24 change	2024, millions of units	2023-24 change	2022-24 change	2024, millions of kg	2023-24 change	2022-24 change
Meat	228.0	14.7%	29.5%	91.0	20.1%	32.1%	17.0	16.0%	24.9%
Milk and drinks	323.6	2.7%	7.4%	169.0	6.1%	6.2%	160.5	5.9%	5.5%
Cheese	22.0	44.6%	102.1%	9.2	35.6%	74.2%	1.4	43.2%	90.4%
Yoghurt	58.3	2.3%	10.0%	41.5	4.0%	5.9%	9.3	-0.2%	-0.9%
Cream	6.7	-11.5%	-4.7%	5.0	-5.2%	-7.1%	1.3	-5.4%	-9.1%
Total	**638.6**	**7.6%**	**16.4%**	**315.6**	**10.0%**	**13.6%**	**189.5**	**6.5%**	**6.9%**

Plant-based food sales value by category in Italy, 2022-2024
(€ millions)



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About the data

This report is based on sales data gathered by [Circana] from retailers in Italy. The data has been analysed by the Good Food Institute Europe.

The data for Italy covers retail sales in hypermarkets, supermarkets, small self-service grocery stores, discount retailers, micro markets, traditional clerk service stores and food specialists. It does not include food service sales, such as from restaurants or fast-food outlets.

Data for 2022, 2023 and 2024 covers the following dates:

- 2022: 3 January 2022 until 1 January 2023
- 2023: 2 January 2023 until 31 December 2023
- 2024: 1 January 2024 until 29 December 2024

Note that GFI Europe's publication *Italy plant-based food retail market insights 2021 to 2023 with initial insights into the 2024 market,* which is also based on Circana data, **covered seven plant-based categories (including desserts and ice cream), whereas the current report covers only five categories**. Caution should therefore be taken when comparing sales totals from that report to figures from this report.

Note also that since a different data provider has been used, with different product category definitions and coverage, the numbers in this report are not directly comparable to those in GFI Europe's previous publication, Market insights on European plant-based sales 2020-2022.

Key terms

Plant-based: foods that are made from plants. Where data permits, we have focused specifically on plant-based products that aim to mimic the taste and texture of animal products. In some categories, non-analogue products such as those based on beans or lentils are also included because the data does not permit further subcategorisation.

Animal-based: food derived from animals, such as meat from pigs or milk from cows.

Plant-based meat: foods made from plants or fungi that are designed to be similar to animal-based meat in taste and texture. The Circana data for plant-based meat may include some products that are not direct substitutes for meat, such as bean burgers, because it was not possible to fully separate out these products. Plant-based meat products may contain small amounts of egg or dairy, but plant-based ingredients like soy or pea are the main protein sources. Plant-based meat does not include tofu, tempeh or seitan – these categories have been reported separately.

Plant-based milk and drinks: drinks made from plants such as soy or oat that are intended to mimic the taste and performance of animal-based dairy milk. The plant-based milk and drinks category includes plain and flavoured plant-based milks as well as some other drinks containing a dairy alternative component, such as coffee drinks. It does not include fruit juices or other drinks not designed to replicate dairy.

Market share: the proportion of all sales in a wider product category (comprising both plant-based and animal-based versions) that is plant-based. This is calculated by dividing plant-based sales by the sum of plant-based and animal-based sales. Market share can be calculated on the basis of sales volume or sales value. Note that in this report, market share is calculated based only on retail sales of pre-packaged products.

Private label: products that are sold under the label of a retailer, as opposed to branded products. Also known as supermarket own-brand products.

Sales value: the total value of sales measured in euros (€).

Sales volume: the total quantity of products sold measured in kilograms (kg) or litres (l), depending on the product category.

Unit sales: the total number of units of a product sold. A unit can refer to a pack, carton or tub, for instance.

Overall plant-based food market

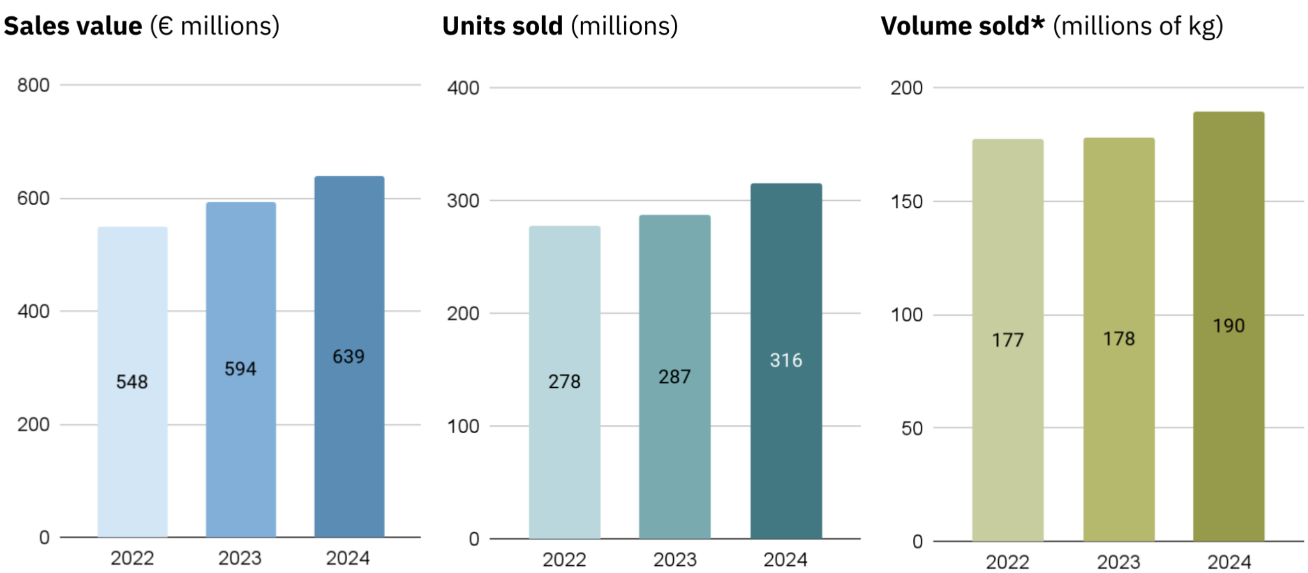
Total Italian plant-based market

Italy’s total plant-based market is growing, driven by moderate growth in the large plant-based milk and drinks category as well as strong growth in the smaller plant-based meat and cheese categories.

Between 2022 and 2024, overall sales value across five plant-based categories (meat, milk and drinks, cheese, yoghurt and cream) grew by 16.4%, reaching €639 million in 2024[1].

Meanwhile, unit sales grew by 13.6% to 316 million units and sales volume rose by 6.9%, reaching 190 million kg. Sales volume growth has accelerated, with the vast majority of the growth happening between 2023 and 2024.

Plant-based food sales across five categories in Italy, 2022-2024



**Sales volume was measured in litres for plant-based milk and drinks and cream and in kg for all other categories. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.*

[1] Note that the previous edition of this report covered two additional categories (plant-based desserts and ice cream), which means that the total market value reported there is not directly comparable to the figures reported here.

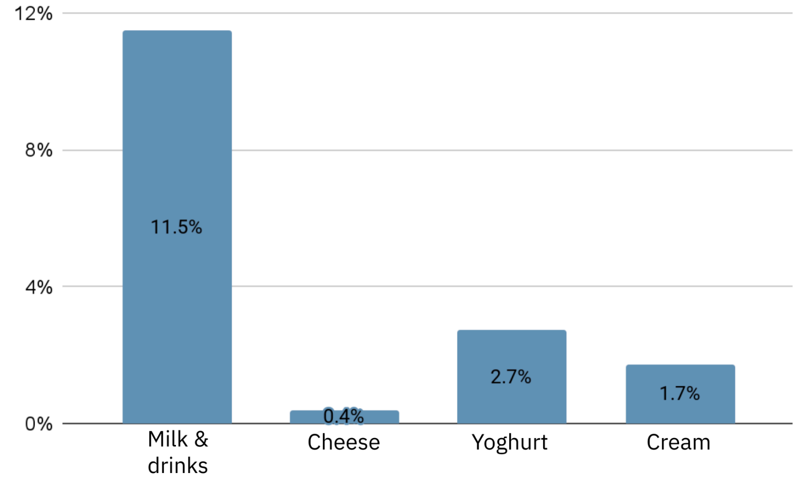
Categories

The largest plant-based categories in Italy are milk and drinks, which accounted for 50.7% of plant-based sales value in 2024, and meat, which accounted for 35.7%.

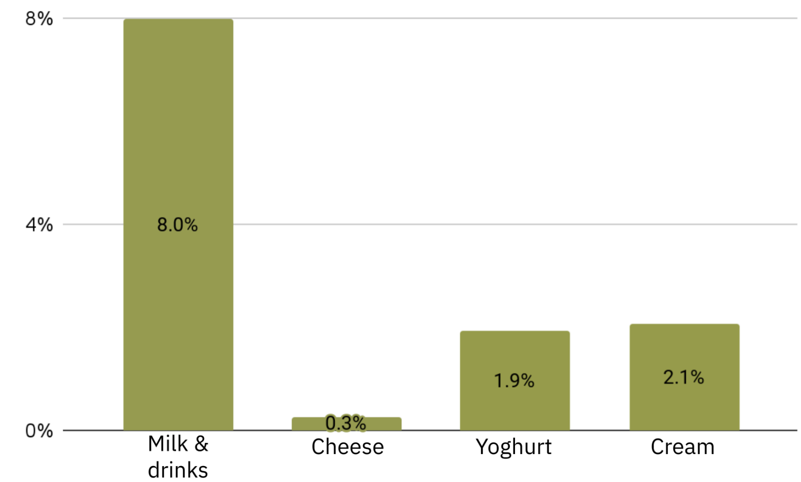
When compared to their animal-based counterparts, plant-based milk and drinks are the most well-established category, with a market share of 11.5% of sales value and 8.0% of sales volume in 2024.

The fastest-growing category in terms of sales value between 2023 and 2024 was plant-based cheese (44.6%), followed by plant-based meat (14.7%). Only plant-based cream decreased in sales value over this time period.

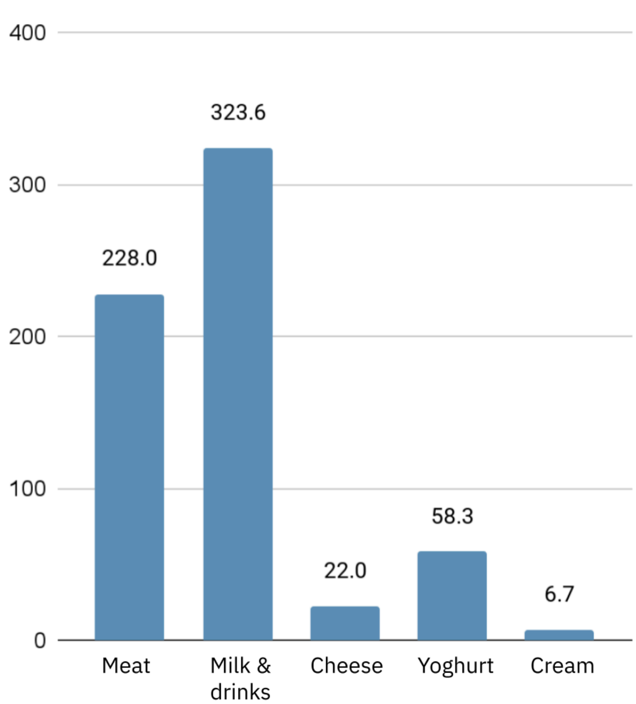
Plant-based food: share of Italy's total pre-packaged (plant- and animal-based) sales for each category, 2024 (% of sales value)



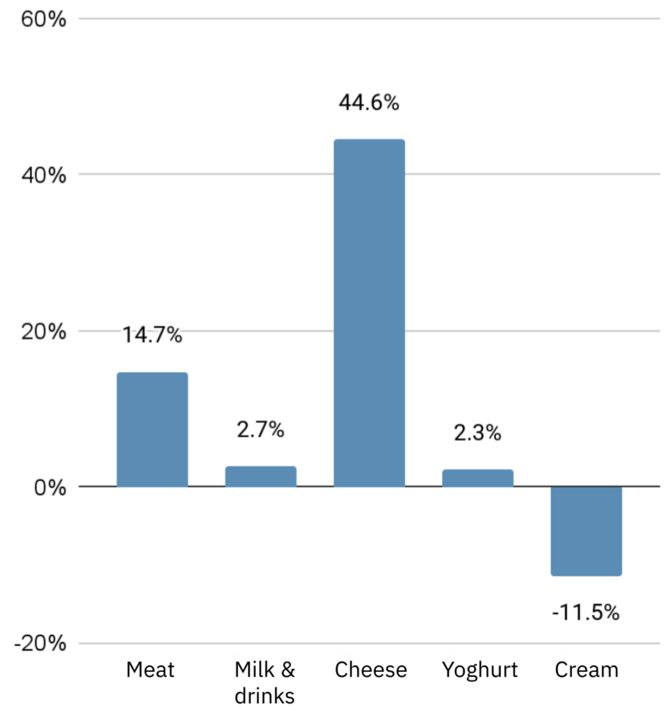
Plant-based food: share of Italy's total pre-packaged (plant- and animal-based) sales for each category, 2024 (% of sales volume)



Plant-based food sales value by category in Italy, 2024
(€ millions)



Change in the sales value of plant-based foods in Italy, 2023-2024 (%)



Branded versus private label

Private-label products – also known as supermarket own-brand, ie, those sold under a retailer's own label – have demonstrated strikingly strong growth relative to branded plant-based products. Between 2022 and 2024, the sales volume of branded products remained roughly steady (a 1.5% decline), while that of private-label products grew by 17.4%.

The emergence of private-label plant-based products demonstrates two points.

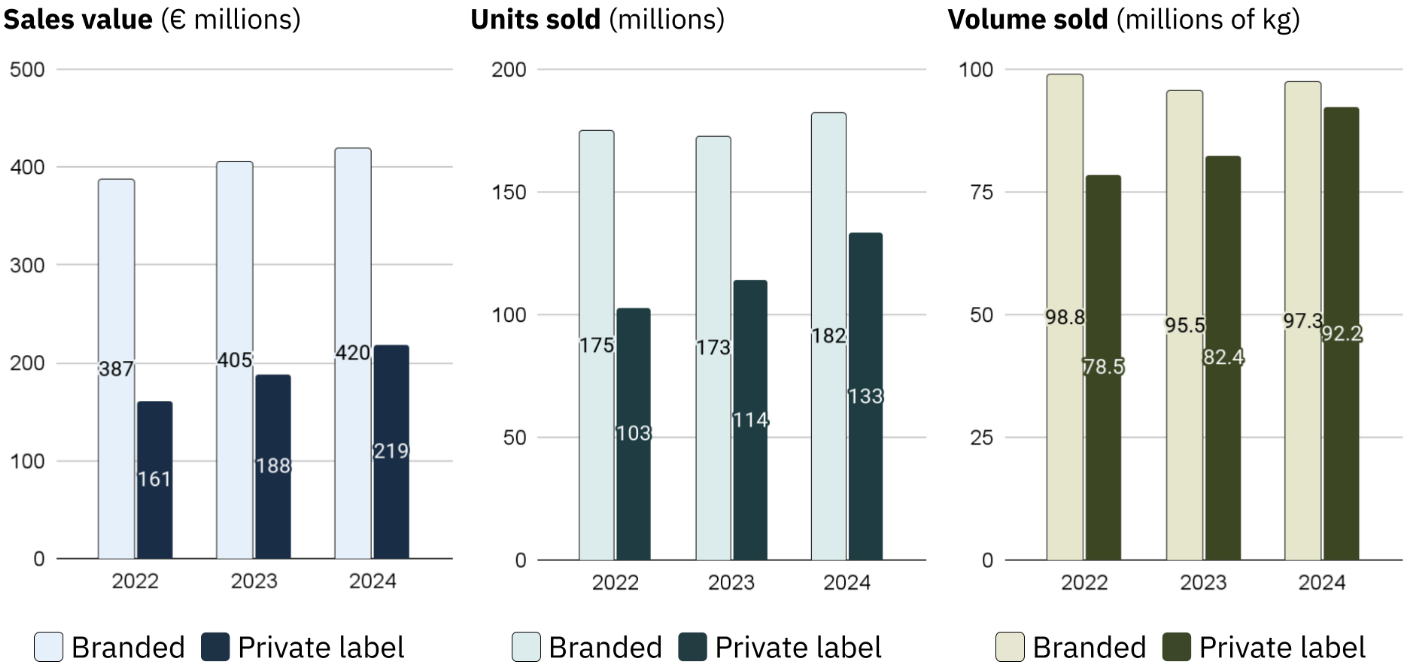
First, it shows that the plant-based sector in Italy has become sufficiently widespread for retailers to find it worthwhile bringing out their own plant-based products.

Second, private-label products were consistently cheaper than branded products. As shown in each of the chapters below, this price advantage appears to have helped some plant-based categories grow, but has not been sufficient in others, where it is likely that other factors such as taste or texture are still barriers.

Plant-based sales and growth rates across five product categories in Italy, branded versus private label, 2022-2024

	Sales value			Unit sales			Sales volume		
	2024, € million	2023-24 change	2022-24 change	2024, million units	2023-24 change	2022-24 change	2024, million kg	2023-24 change	2022-24 change
Branded	419.7	3.6%	8.4%	182.4	5.5%	4.3%	97.3	1.9%	-1.5%
Private label	218.9	16.1%	35.7%	133.2	16.8%	29.4%	92.2	11.8%	17.4%

Plant-based food sales across five categories in Italy, branded versus private label, 2022-2024



**Sales volume was measured in litres for plant-based milk and cream and in kg for all other categories. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.*

Comparison to animal-based foods

Retail sales trends were available for animal-based equivalents in four product categories (milk and drinks, cheese, yoghurt and cream), but not for meat.

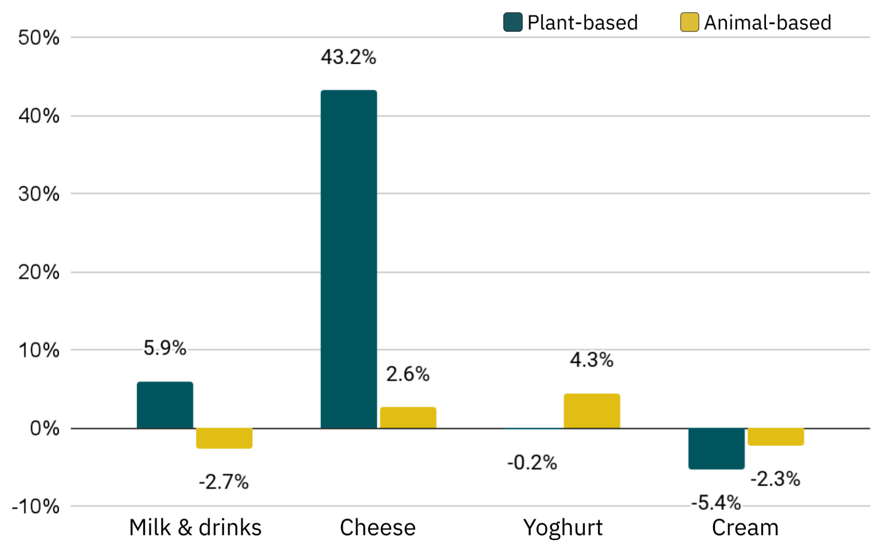
Between 2023 and 2024, the sales volume of plant-based milk and drinks rose while that of dairy milk fell.

Percentage growth in plant-based cheese sales volume far outstripped that of dairy cheese – but note that plant-based cheese still had only a very small market relative to dairy cheese.

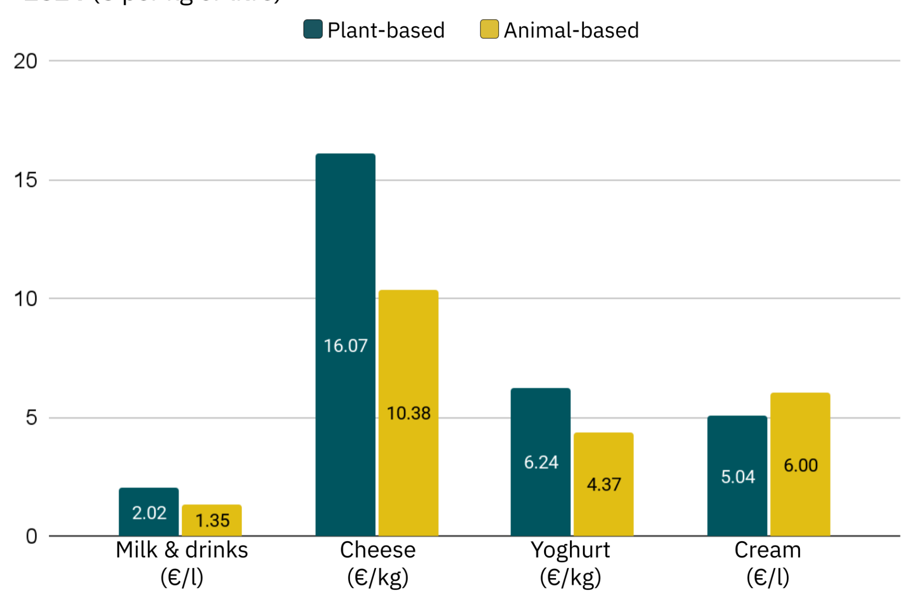
Animal-based yoghurt sales volume rose while plant-based sales volume remained steady.

For cream, plant-based sales volume fell more than that of dairy cream, despite it being the only plant-based category that is cheaper than its animal-based counterpart.

Change in the sales volume of pre-packaged plant- and animal-based foods in Italy, 2023-2024 (%)



Average price per kg or litre of plant- and animal-based foods in Italy, 2024 (€ per kg or litre)



Plant-based meat

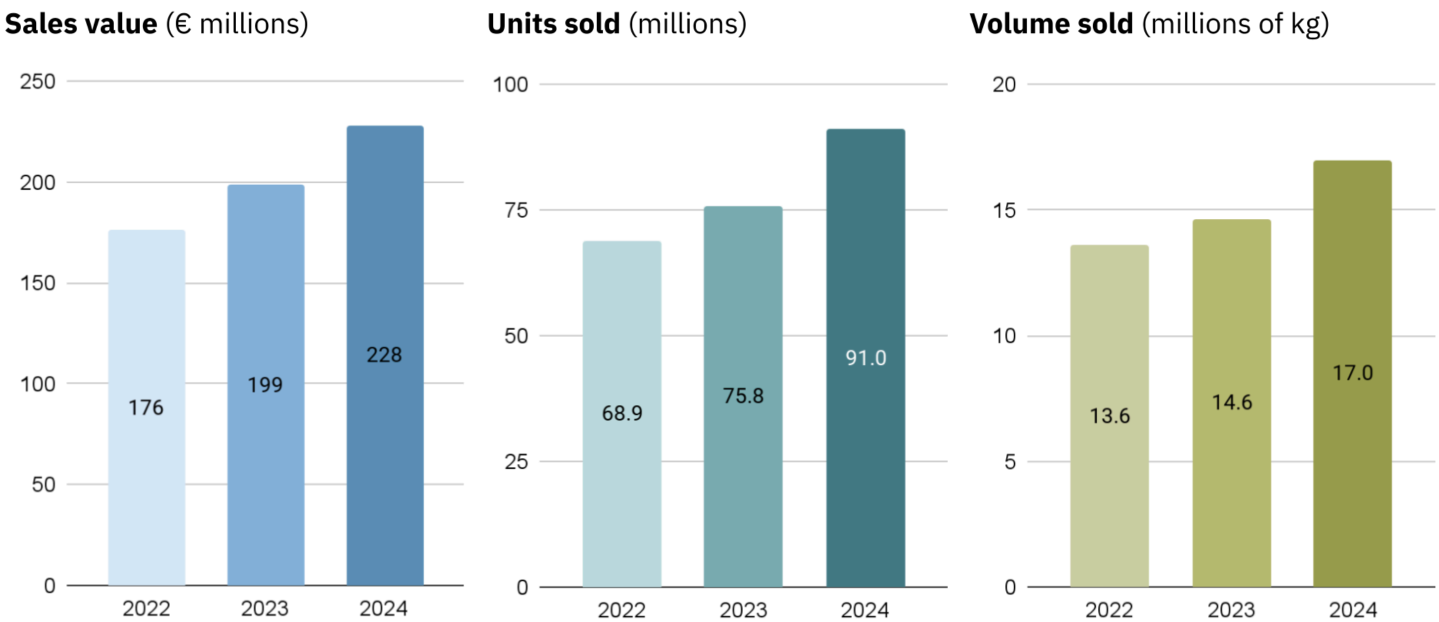
Total market

Between 2022 and 2024, the annual sales value of plant-based meat in Italy increased by 29.5% to €228 million. Over the same time period, unit sales increased by 32.1% to 91.0 million units and sales volume increased by 24.9% to 17.0 million kg.

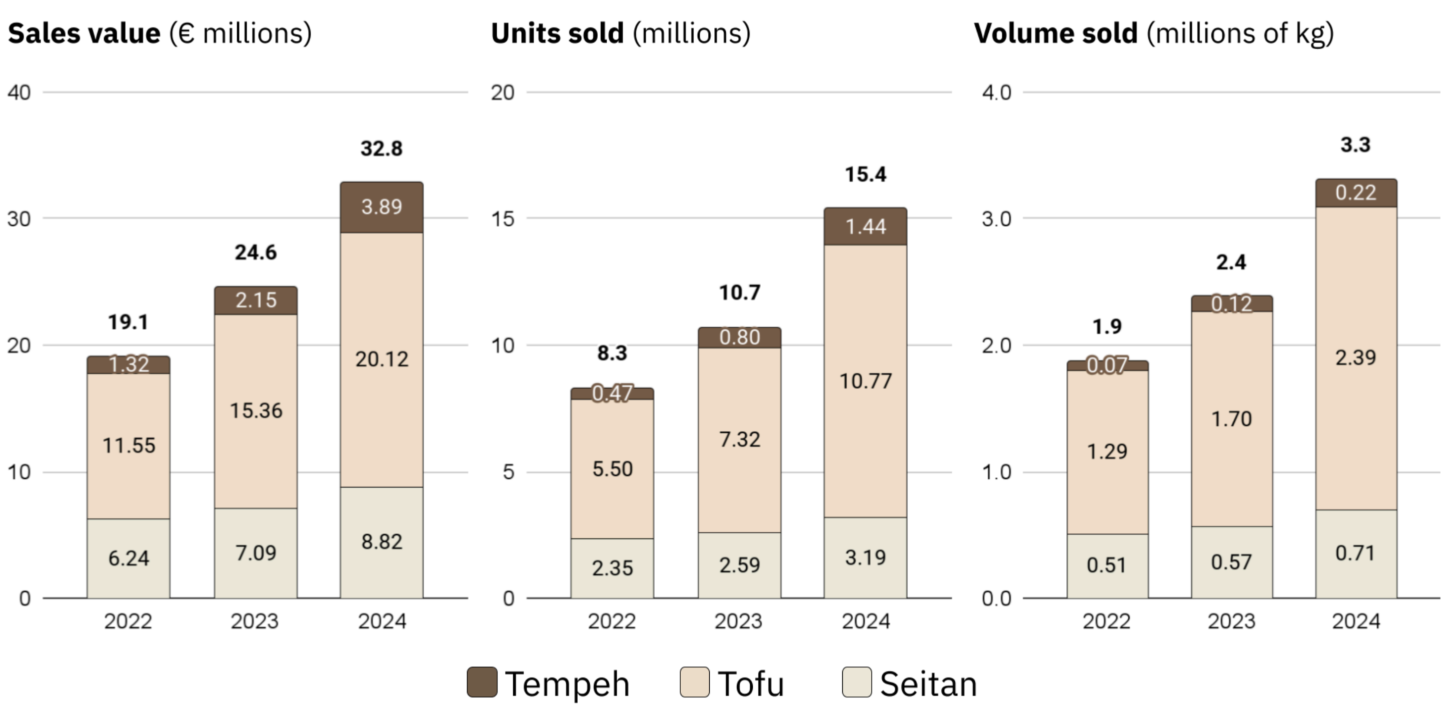
The rate of growth accelerated over this time period, with most of the growth happening in 2024. The year-on-year change in sales value was 12.8% between 2022 and 2023, and 14.7% between 2023 and 2024. For sales volume, the increase was 7.7% between 2022 and 2023, and 16.0% between 2023 and 2024.

The plant-based meat category does not include tofu, tempeh or seitan. For comparison, the total sales value of those three products increased by 72% between 2022 and 2024, reaching €33 million in 2024, while sales volume increased by 77%. Tofu, tempeh and seitan cost an average of €9.91/kg during 2024, which could explain their rapid growth compared to plant-based meat, which cost an average of €13.43. However, plant-based meat still has a much larger market than tofu, tempeh and seitan, demonstrating the importance of products that are intended to offer a similar taste and eating experience to meat.

Plant-based meat sales in Italy, 2022-2024



Tofu, seitan and tempeh sales in Italy, 2022-2024



Branded versus private label

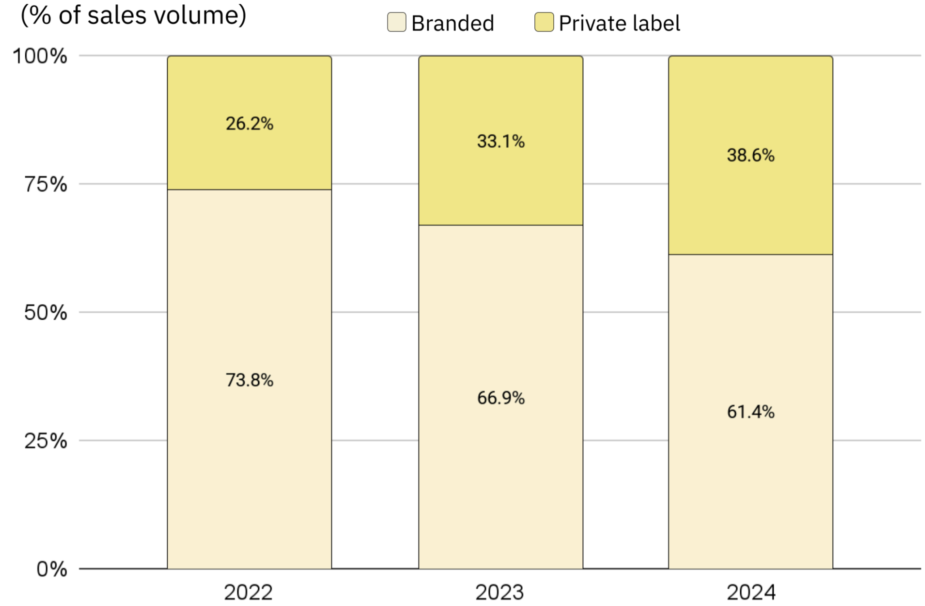
Sales of private-label plant-based meat – products sold under a retailer's own brand – have increased, reaching 38.6% of total sales volume in 2024.

This trend may be driven by the relative affordability of private-label products, which were on average 16% cheaper per kg than branded products in 2024.

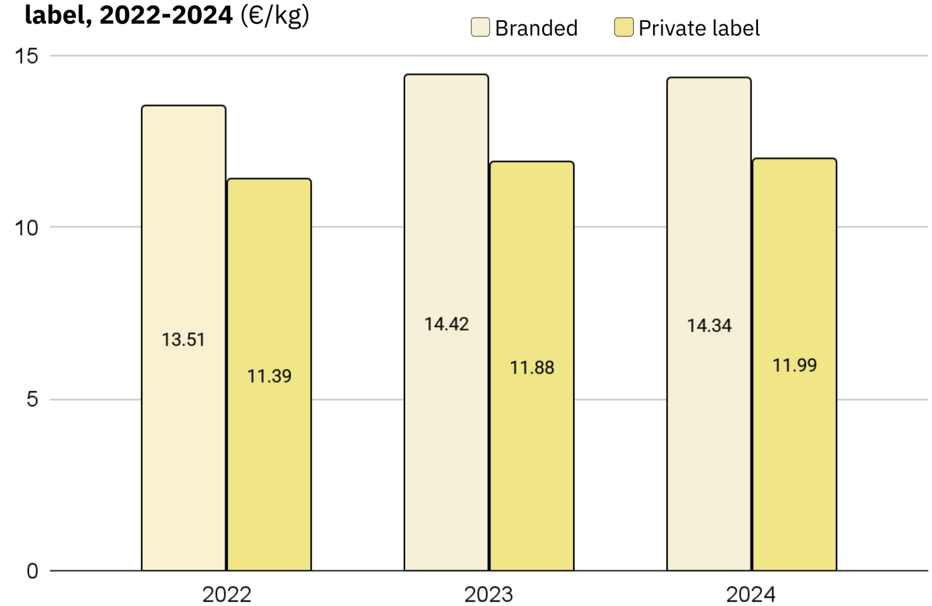
However, the market share for branded products remained high, at 61% of sales volume and 66% of sales value in 2024. The sales volume of branded plant-based meat also increased in absolute terms between 2023 and 2024.

This suggests that price is not the only factor determining consumer choices. The recent NECTAR study [Taste of the Industry 2025] (which tested both American and European products) showed that, in the United States, better-tasting plant-based meat brands gain more market share and price has less impact on intention to purchase. It is likely that taste is similarly important in the Italian market.

Italy plant-based meat sales by branded or private label, 2022-2024 (% of sales volume)



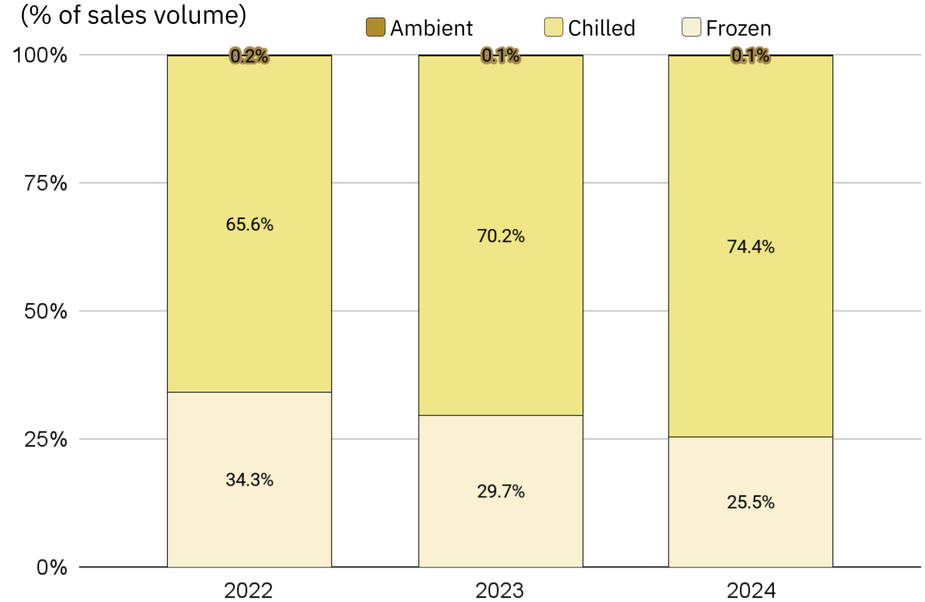
Average price per kg of plant-based meat in Italy, by branded or private label, 2022-2024 (€/kg)



Product format breakdown

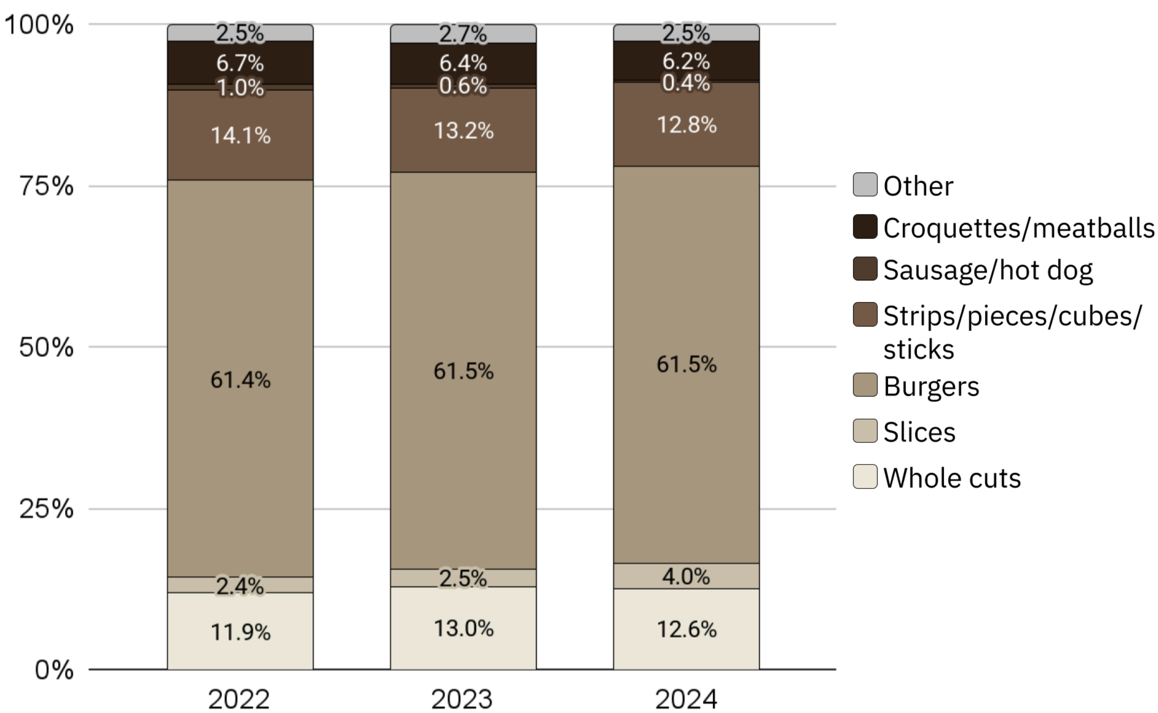
Chilled products accounted for nearly three-quarters of the sales volume of plant-based meat in 2024, and this share has risen over time. As chilled products were more expensive on average (€14.50/kg in 2024, compared with €10.28/kg for frozen), this indicates that price is probably not the primary driver of product choice.

Italy plant-based meat sales by temperature, 2022-2024
(% of sales volume)



Burgers were the most popular product format, accounting for 61.5% of sales volume in 2024. There has been some growth in the "slices" category.

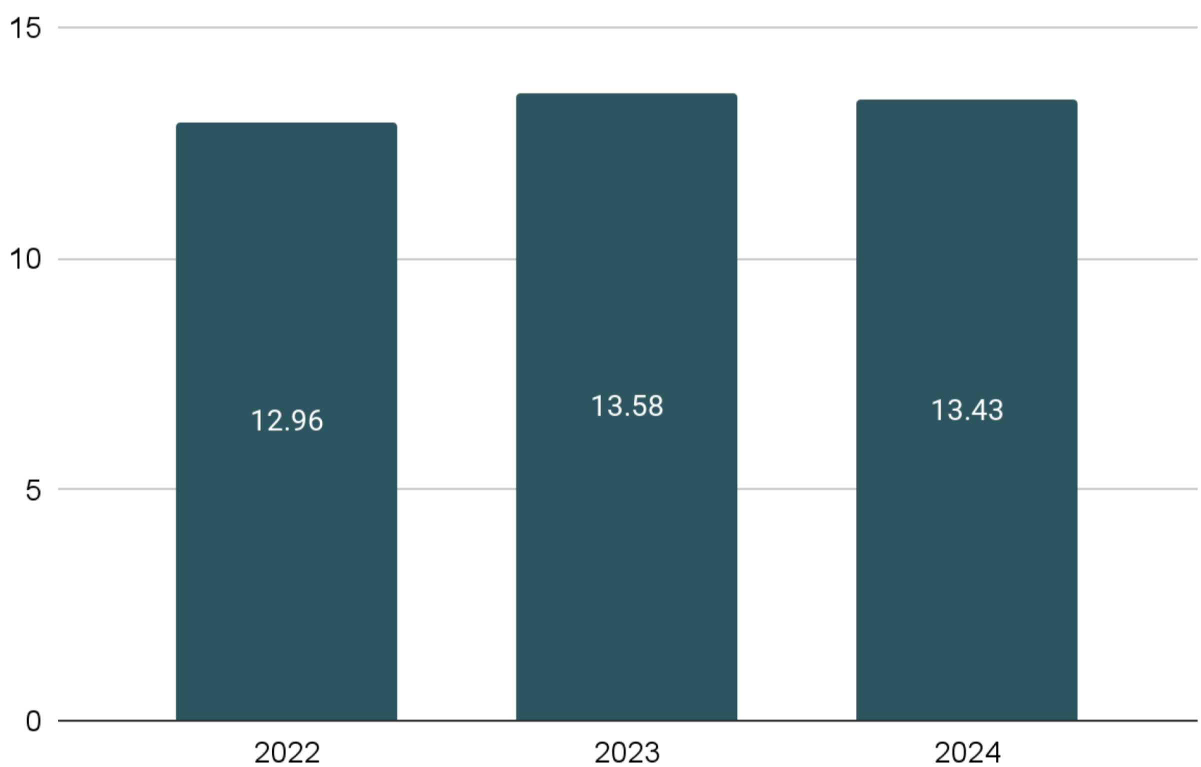
Italy plant-based meat sales by format, 2022-2024
(% of sales volume)



Price trends

The average price per kg of plant-based meat rose by 4.8% between 2022 and 2023, then remained roughly steady (a fall of 1.1% to 2024). For comparison, Italy's rate of inflation in the broader food sector fell to 0.9% in the summer of 2024 following its peak of 13.6% in November 2022. However, broader food inflation has not gone below zero, whereas plant-based meat has actually decreased in price.

Average price per kg for plant-based meat in Italy, 2022-2024 (€/kg)



Plant-based milk and drinks

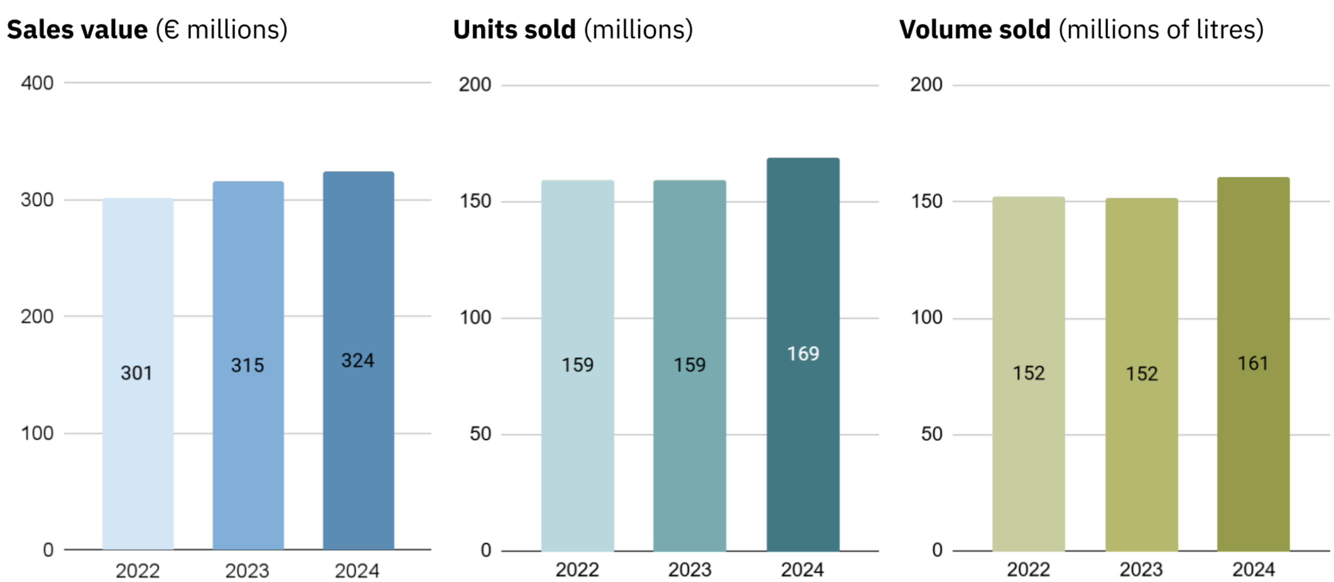
Total market

Italy's plant-based milk and drinks category is growing at a moderate rate despite remaining more expensive than animal-based dairy milk, driven partly by the growing private-label segment.

Between 2022 and 2024, sales value increased by 7.4% to €324 million, unit sales increased by 6.2% to 169 million, and sales volume increased by 5.5% to 161 million litres.

Most of the increase in sales volume happened between 2023 and 2024, after remaining flat between 2022 and 2023.

Plant-based milk and drinks sales in Italy, 2022-2024



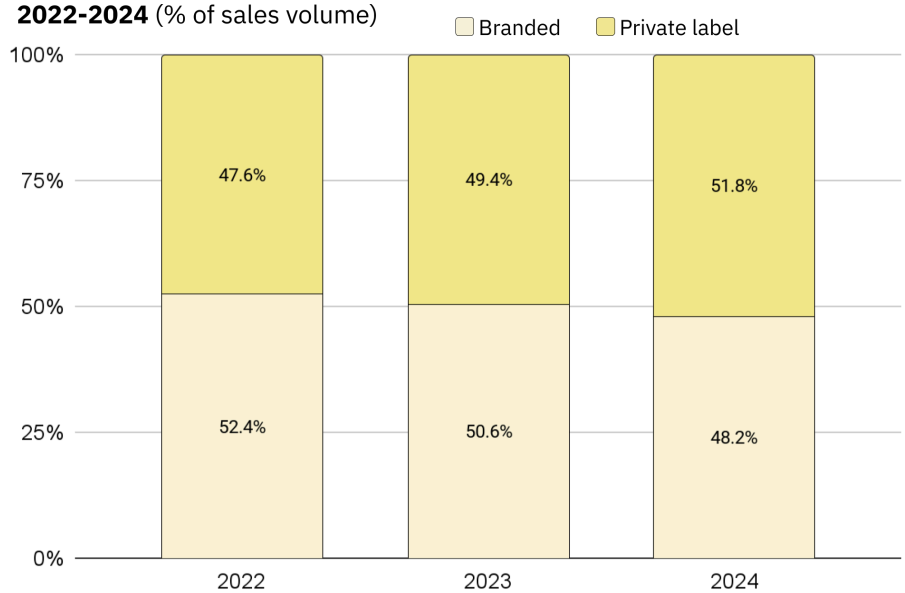
Branded versus private label

Most of the increase in sales volume between 2023 and 2024 came from the growing share of private-label products, which now account for just over half of the market.

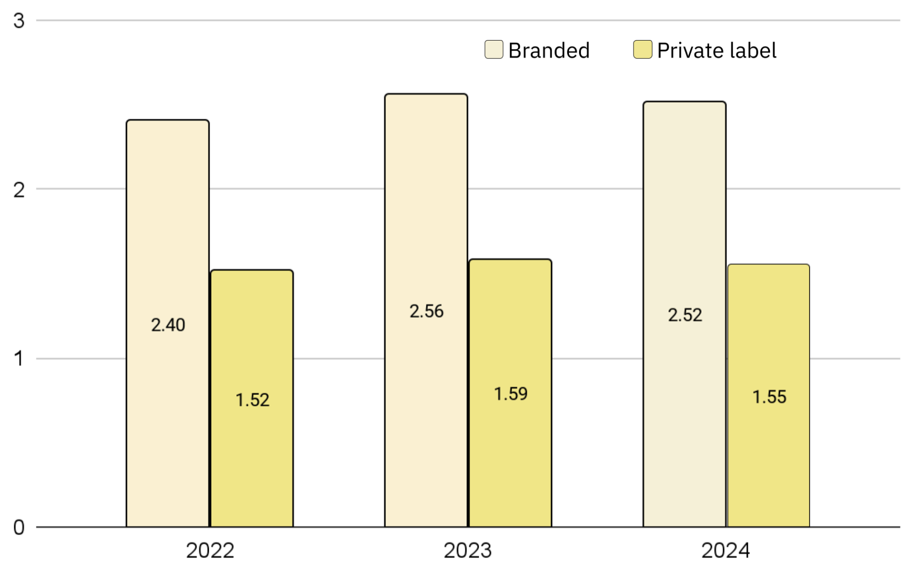
In absolute terms, the sales volume of branded products remained steady (a 0.9% increase between 2023 and 2024), while private-label products grew strongly (an 11.0% increase).

In 2024, private-label plant-based milk and drinks were, on average, 38% cheaper per litre than branded options, a factor that probably contributed to their strong sales growth.

Italy plant-based milk and drinks sales by branded or private label, 2022-2024 (% of sales volume)



Average price per litre of plant-based milk and drinks in Italy, by branded or private label, 2022-2024 (€/l)

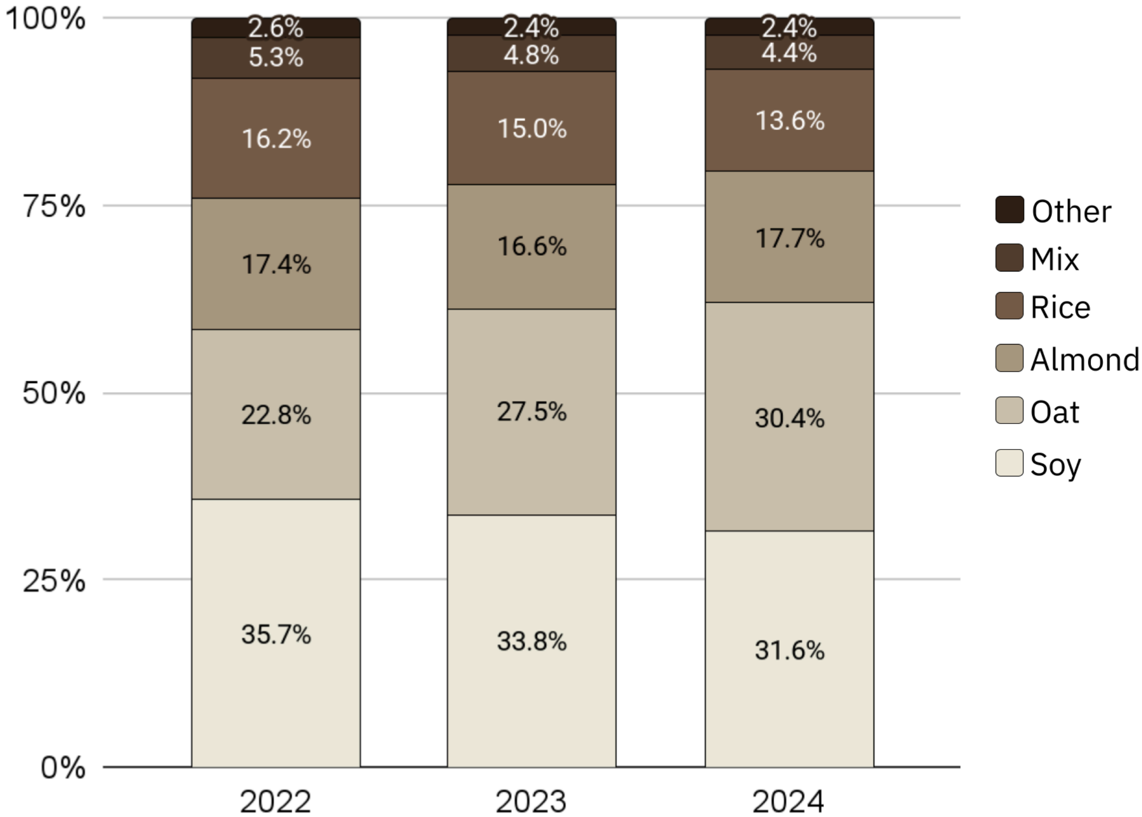


Product format breakdown

The vast majority of plant-based milk and drinks in Italy for which data is available were ambient, at 99.9% of sales volume in 2024.

Soy was the best-selling type of plant-based milk and drink, accounting for 31.6% of sales volume in 2024, but it has lost market share to the growing oat segment. Milk and drinks made from almonds also grew both in market share and absolute sales volume between 2023 and 2024.

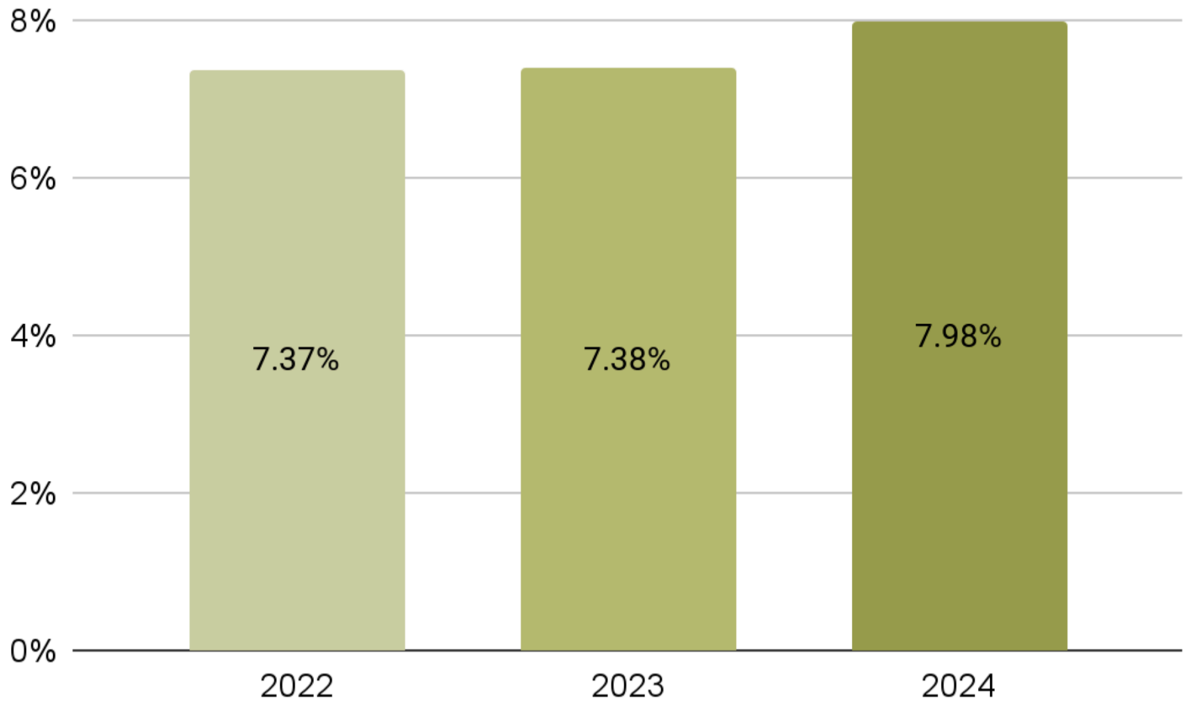
Italy plant-based milk and drinks sales by base ingredient, 2022-2024
(% of sales volume)



Market share

The market share of plant-based milk and drinks, as a percentage of the overall sales volume of plant-based milk and drinks and animal-based milk[2], rose from 7.37% in 2022 to 7.98% in 2024, driven partly by the rising sales volume of plant-based milk and drinks and partly by the falling sales volume of animal-based milk.

Plant-based milk and drinks: share of Italy's total (plant- and animal-based) milk and drinks market, 2022-2024
(% of sales volume)



[2] Both fresh and long-life milk.

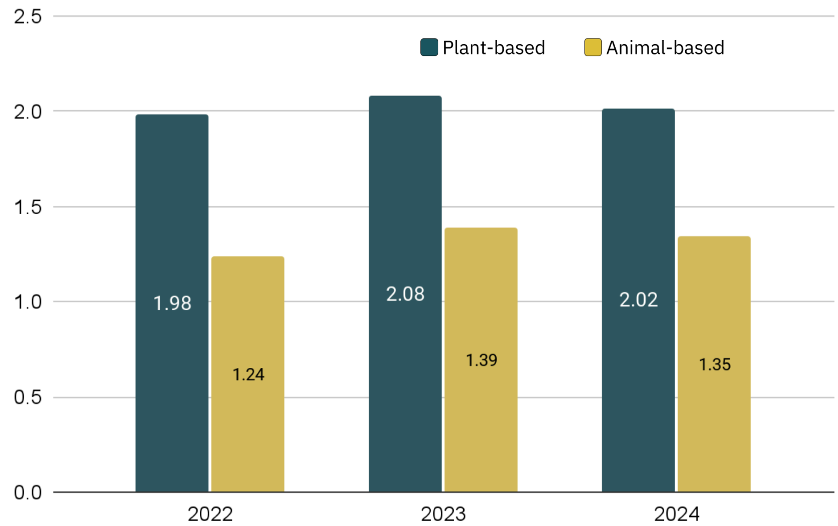
Price trends relative to animal equivalent

Plant-based milk and drinks are still more expensive per litre than animal-based milk, but the price gap has decreased over time.[3] In 2022, the price premium was 60%, falling to 50% by 2024.

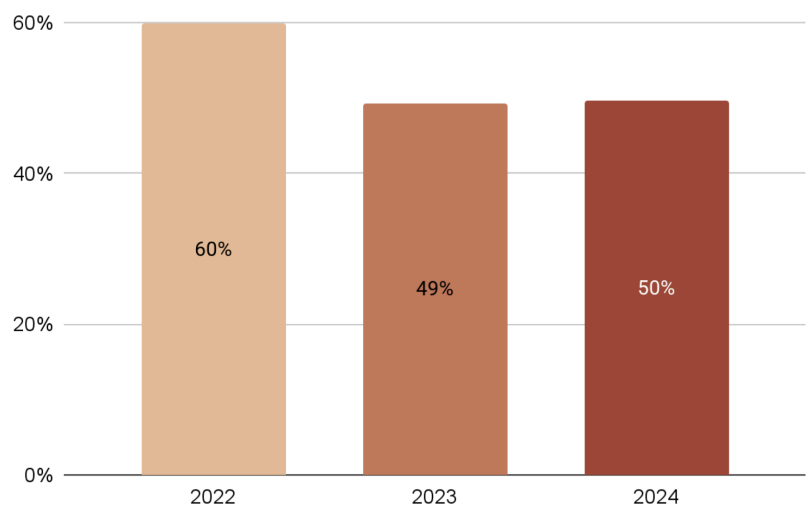
Between 2023 and 2024, the price of plant-based milk and drinks fell, despite [inflation in Italy's wider food sector]() remaining above zero throughout 2023 and 2024.

As shown above, private-label plant-based milk and drinks are cheaper than branded products. Private-label plant-based milk and drinks, at €1.55 per litre in 2024, were close in price to branded dairy milk (€1.48 per litre). However, private-label animal-based milk is cheaper still, at €1.11 per litre, showing that there is still further progress to be made before plant-based milk and drinks can compete on price.

Average price per litre for plant-based and animal-based milk and drinks in Italy, 2022-2024 (€/l)



Price difference for plant-based milk and drinks compared to animal-based milk and drinks in Italy, 2022-2024
(% difference based on €/l)



[3] Italy is [among the countries]() that apply a significantly higher value added tax (VAT) to plant-based milk (22%) than to cow's milk (4% on pasteurised milk and 10% on fresh and preserved milk).

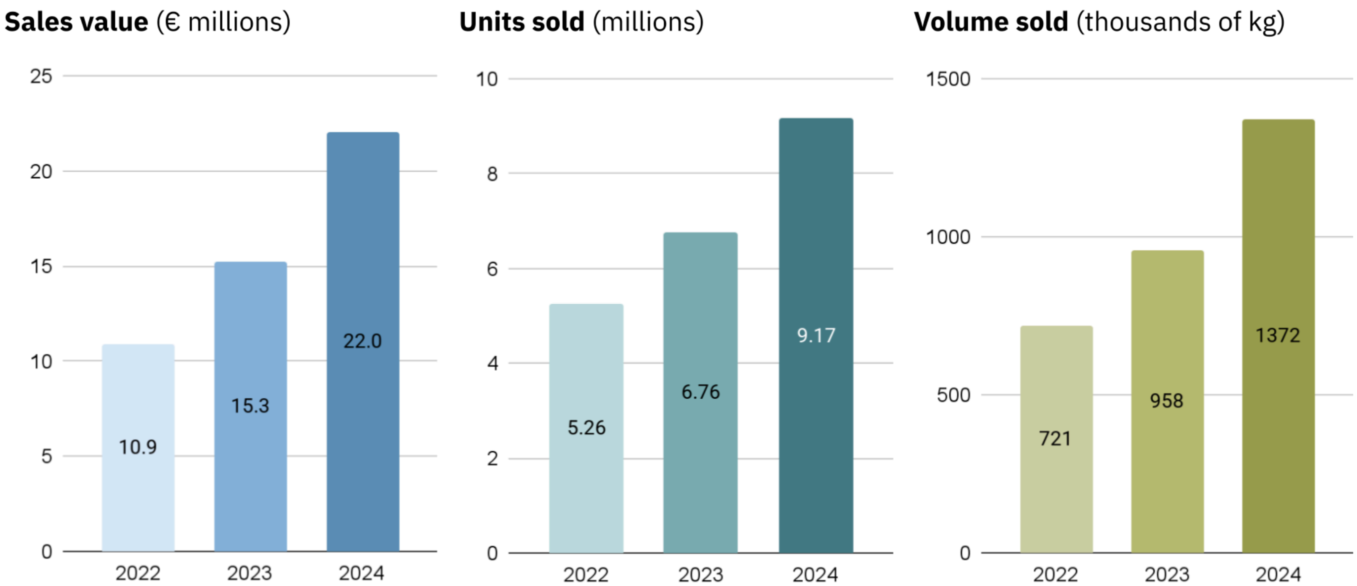
Plant-based cheese

Total market

Although small, the Italian market for plant-based cheese has grown rapidly despite the product being more expensive than animal-based cheese.

Between 2022 and 2024, sales value doubled, unit sales rose by 74% and sales volume rose by 90%. The market is accelerating, with a year-on-year change in sales volume of 33% from 2022 to 2023 and 43% from 2023 to 2024.

Plant-based cheese sales in Italy, 2022-2024

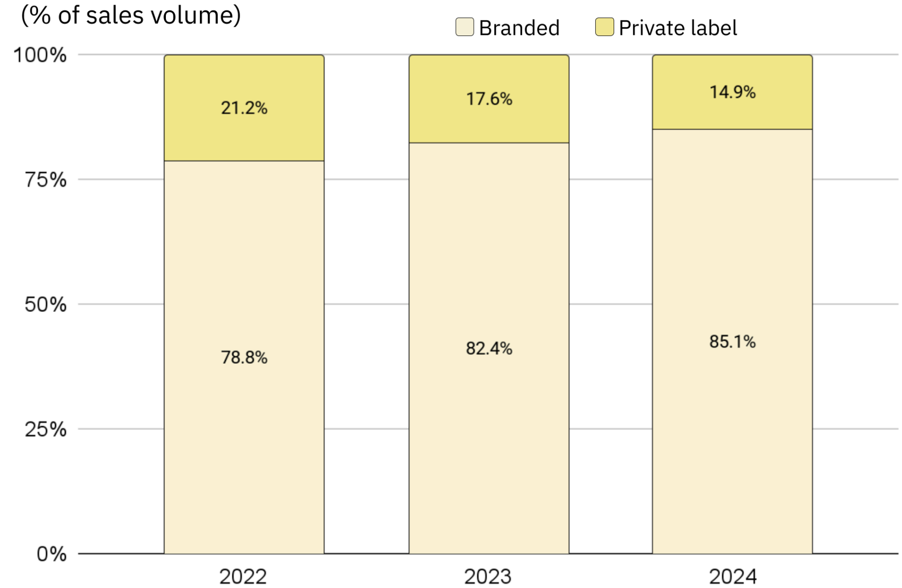


Branded versus private label

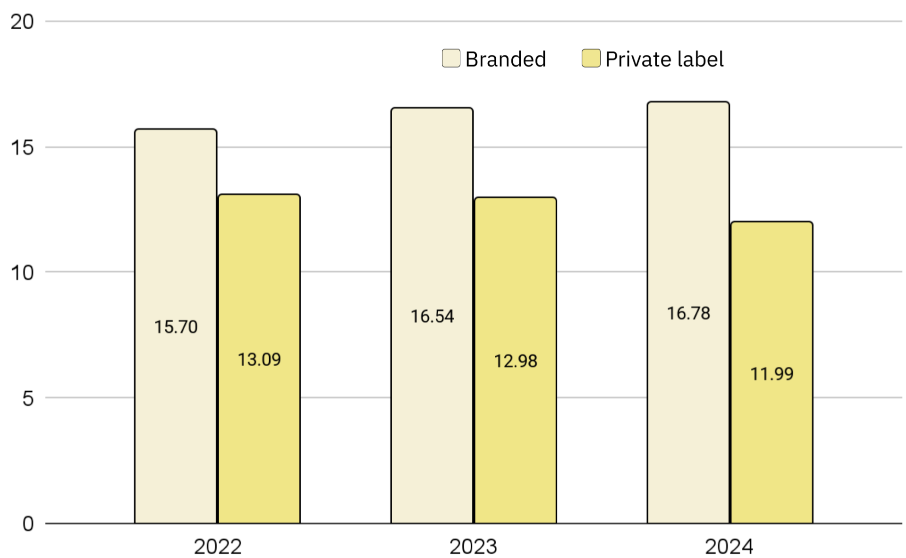
The sales volume of both branded and private-label plant-based cheese has grown in absolute terms. However, branded products accounted for a rising proportion of sales volume – up from 78.8% in 2022 to 85.1% in 2024.

Private-label plant-based cheese has fallen in price while branded options have become more expensive per kg. The strong sales growth of branded options, despite their higher price compared to private-label, suggests that other factors such as taste and texture may be more important in this small but growing market.

Italy plant-based cheese sales by branded or private label, 2022-2024
(% of sales volume)



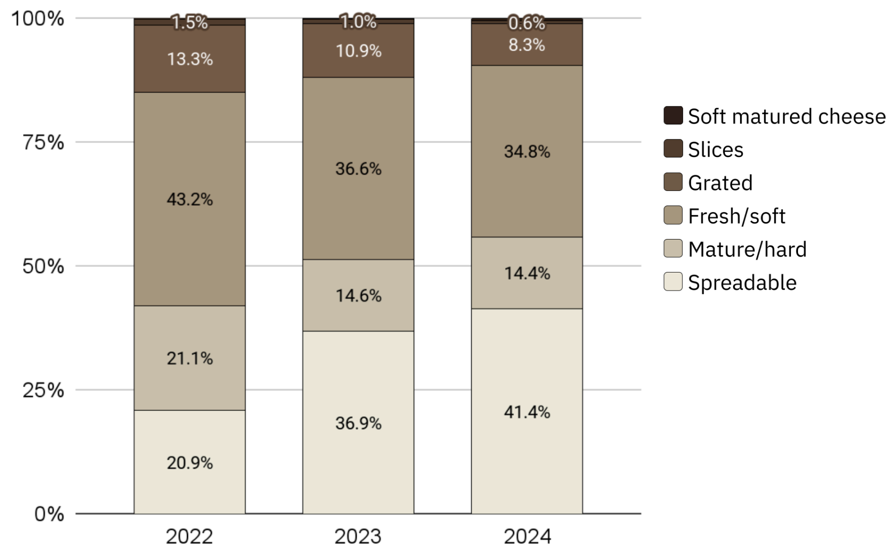
Average price per kg of plant-based cheese in Italy, by branded or private label, 2022-2024 (€/kg)



Product format breakdown

Spreadable plant-based cheese saw the greatest growth in market share between 2022 and 2024. However, all types except for slices have grown in terms of absolute sales volume over this time period.

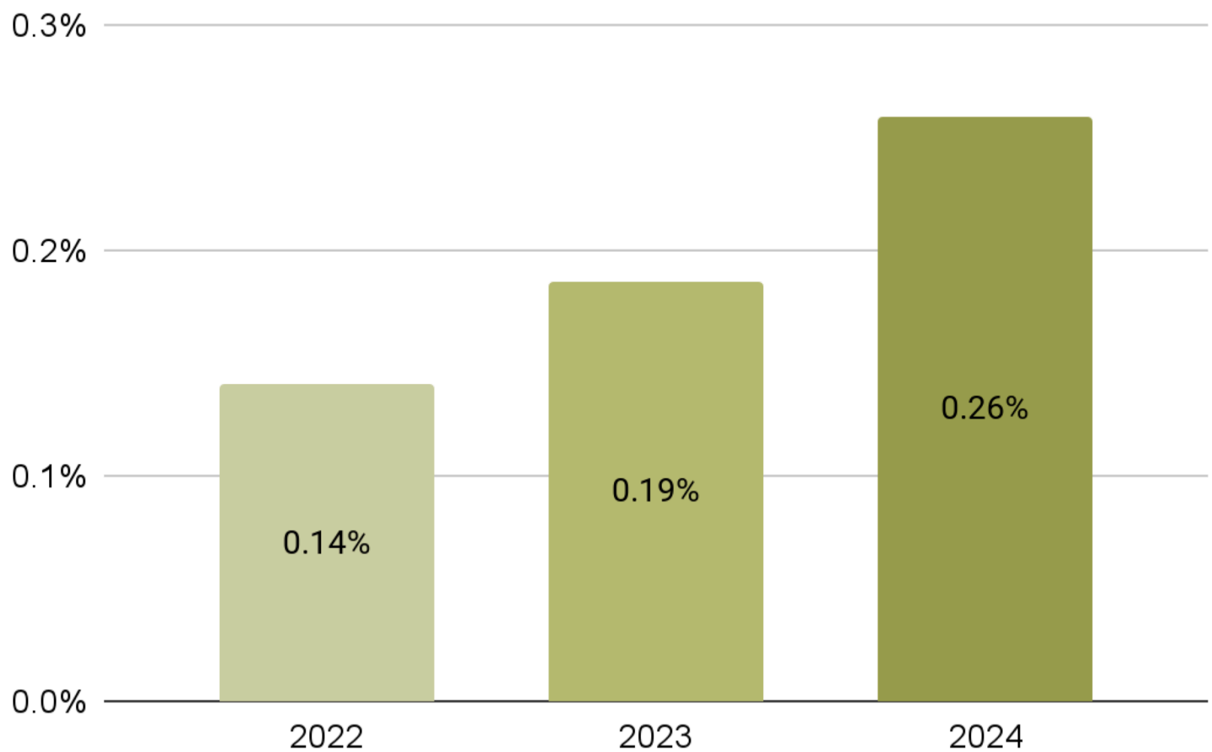
Italy plant-based cheese sales by type, 2022-2024 (% of sales volume)



Market share

Despite having almost doubled between 2022 and 2024, plant-based cheese's share of total prepackaged plant- and animal-based cheese sales in Italy remained small, at just 0.26% in 2024. This shows that plant-based cheese is still an emerging category.

Plant-based cheese: share of Italy's total (plant- and animal-based) cheese market, 2022-2024 (% of sales volume)

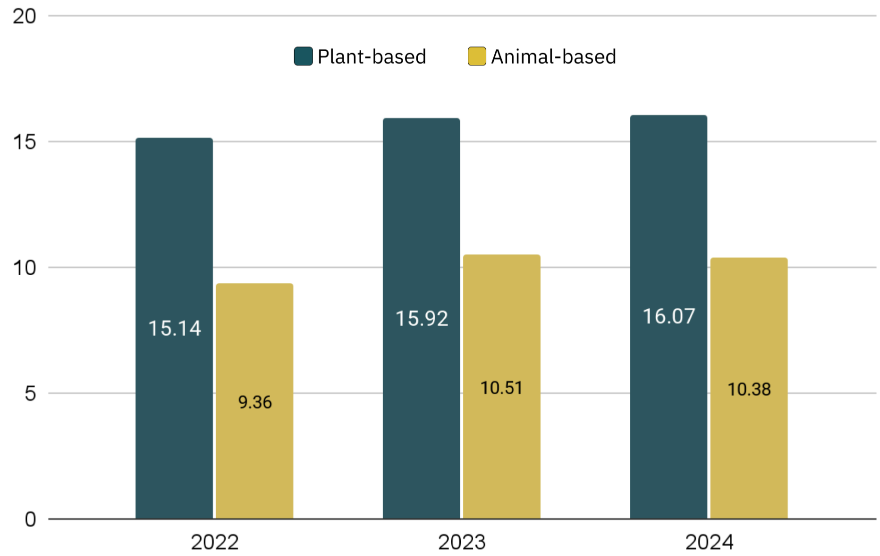


Price trends relative to animal equivalent

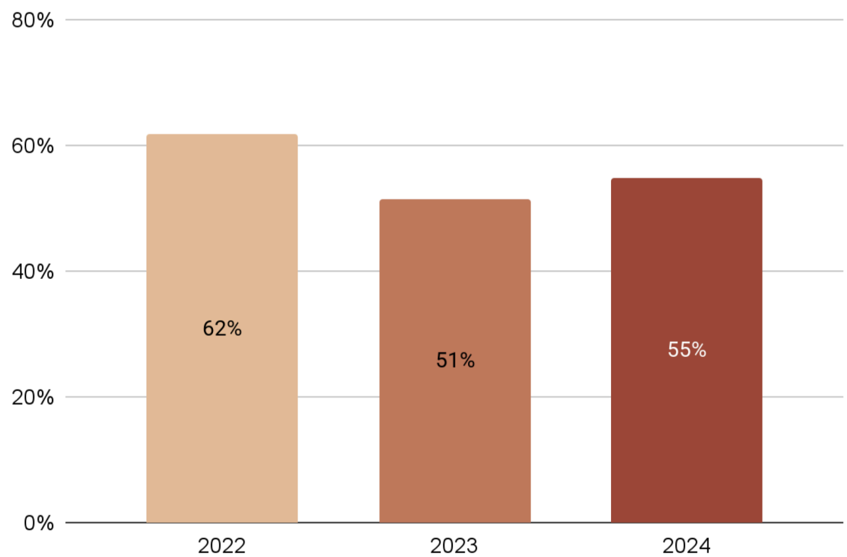
Following inflation in both plant-based and animal-based cheese prices between 2022 and 2023, the price of both stabilised between 2023 and 2024.

The price premium of plant-based cheese dipped to 51% in 2023 before rising again to 55% in 2024 because of a slight fall in the price of animal-based cheese.

Average price per kg for plant-based and animal-based cheese in Italy, 2022-2024 (€/kg)



Price difference for plant-based cheese compared to animal-based cheese in Italy, 2022-2024 (% difference based on €/kg)



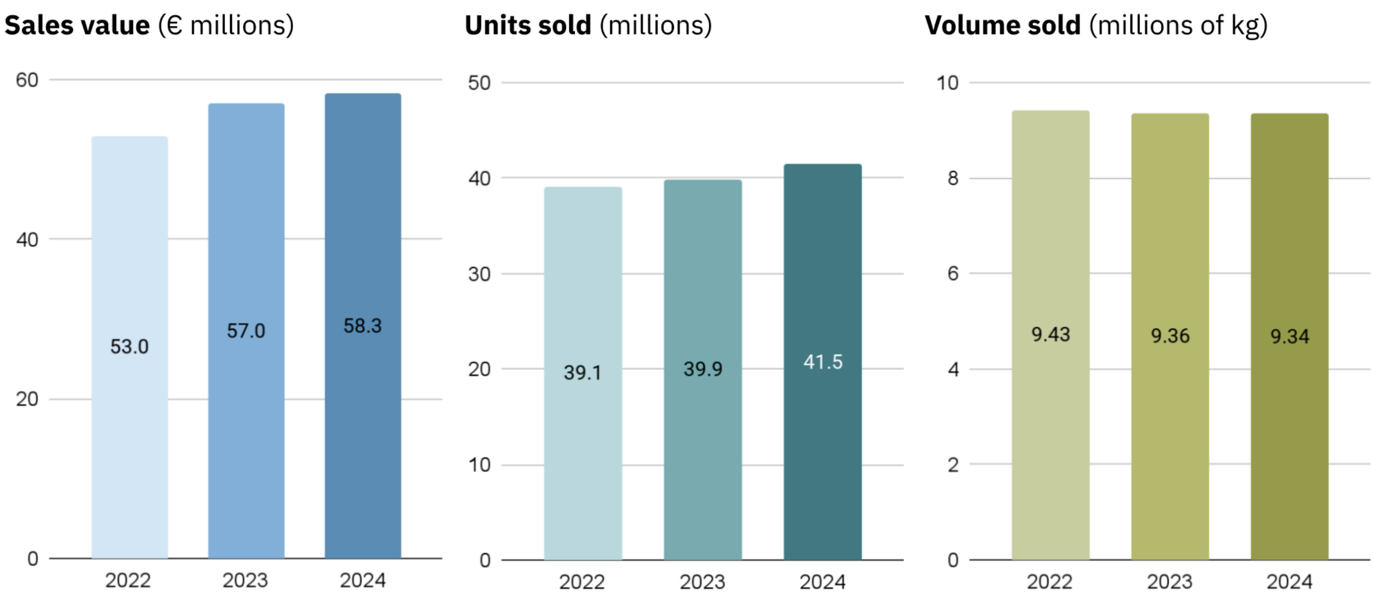
Plant-based yoghurt

Total market

The market for plant-based yoghurt in Italy has remained steady in recent years, possibly constrained by a rising price gap relative to dairy yoghurt.

Between 2022 and 2024, plant-based yoghurt's sales value rose by 10.0%, unit sales rose by 5.9% and sales volume fell by 0.9%. Most of the increase in sales value happened between 2022 and 2023, possibly reflecting higher inflation during that time, and most of the increase in unit sales happened between 2023 and 2024.

Plant-based yoghurt sales in Italy, 2022-2024

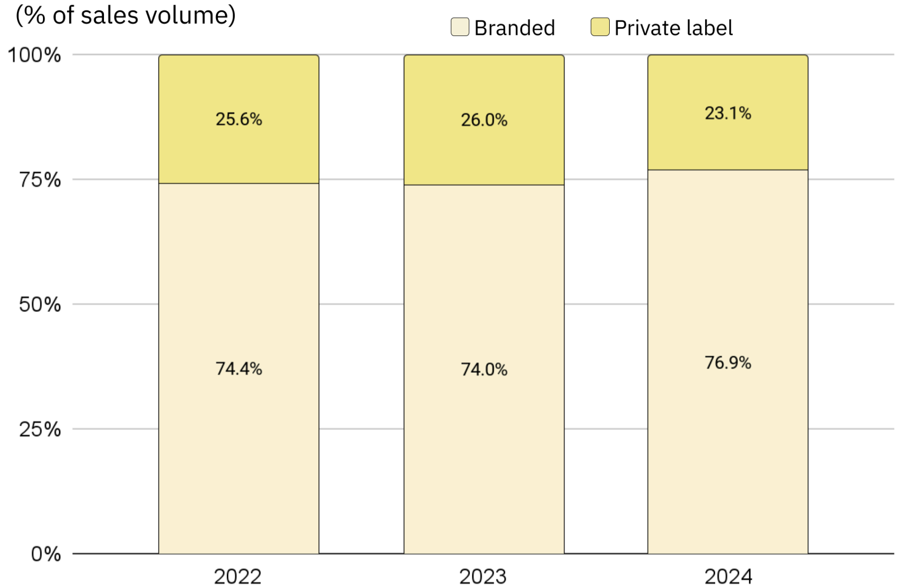


Branded versus private label

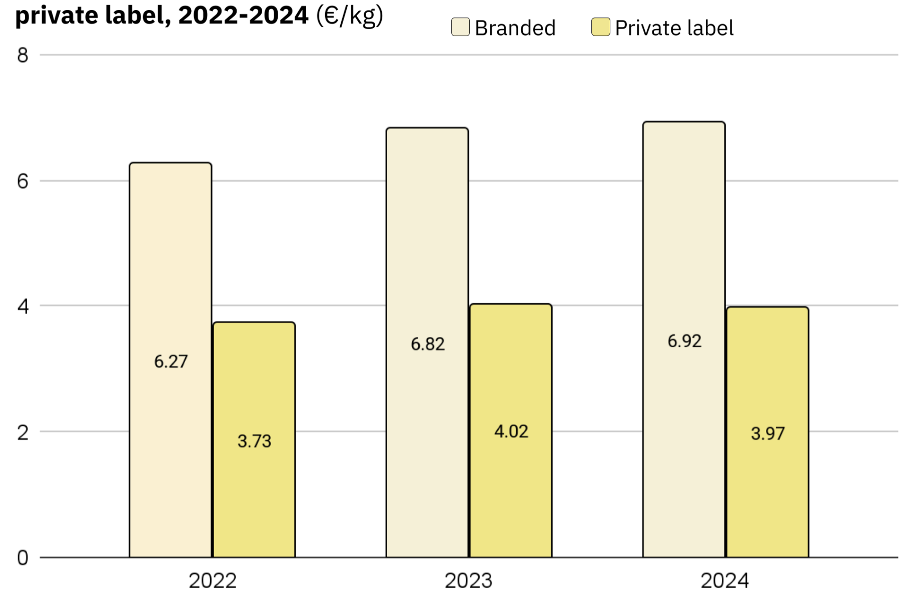
Branded products are notably more expensive than private-label plant-based yoghurt (75% more expensive in 2024).

Nevertheless, the market share of branded plant-based yoghurt rose from 74.4% of sales volume in 2022 to 76.9% in 2024, suggesting that other factors such as taste are likely also playing a role.

Italy plant-based yoghurt sales by branded or private label, 2022-2024 (% of sales volume)



Average price per kg of plant-based yoghurt in Italy, by branded or private label, 2022-2024 (€/kg)

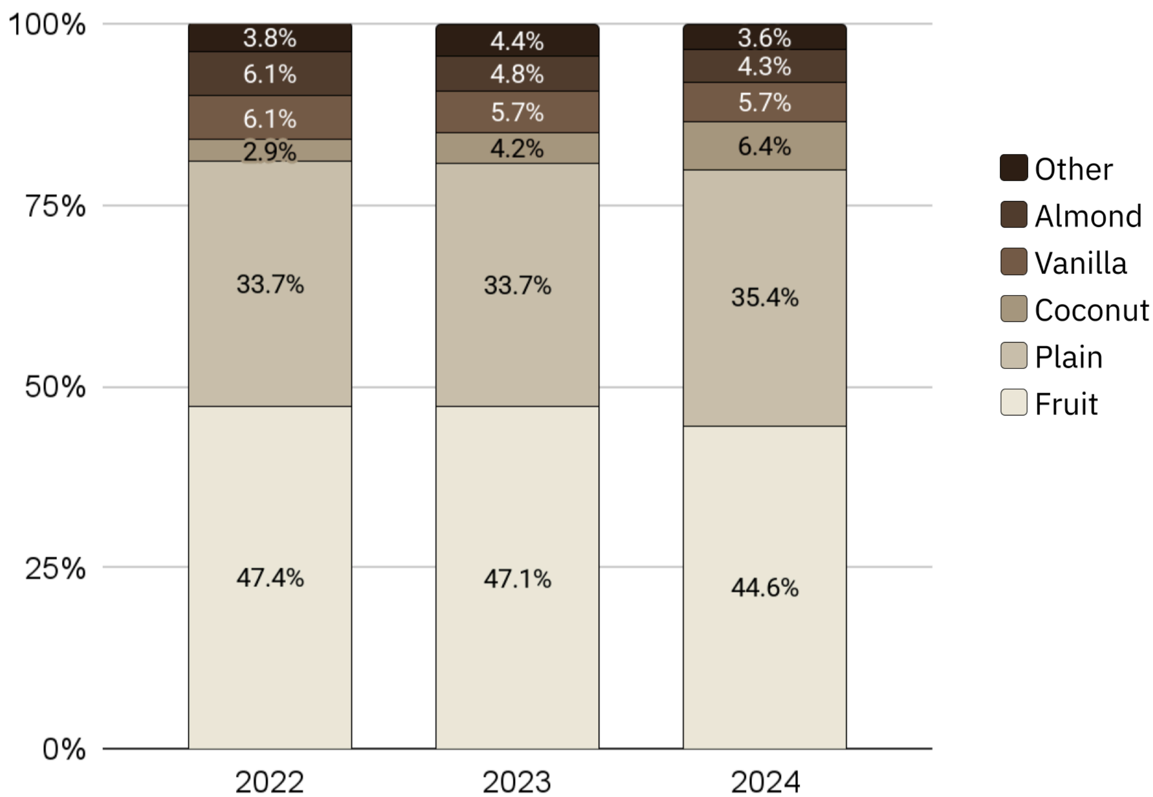


Product format breakdown

The best-selling flavours were fruit (44.6% of sales volume in 2024) and plain (35.4%).

Fruit has been losing both market share and absolute sales volume, while plain and coconut have grown.

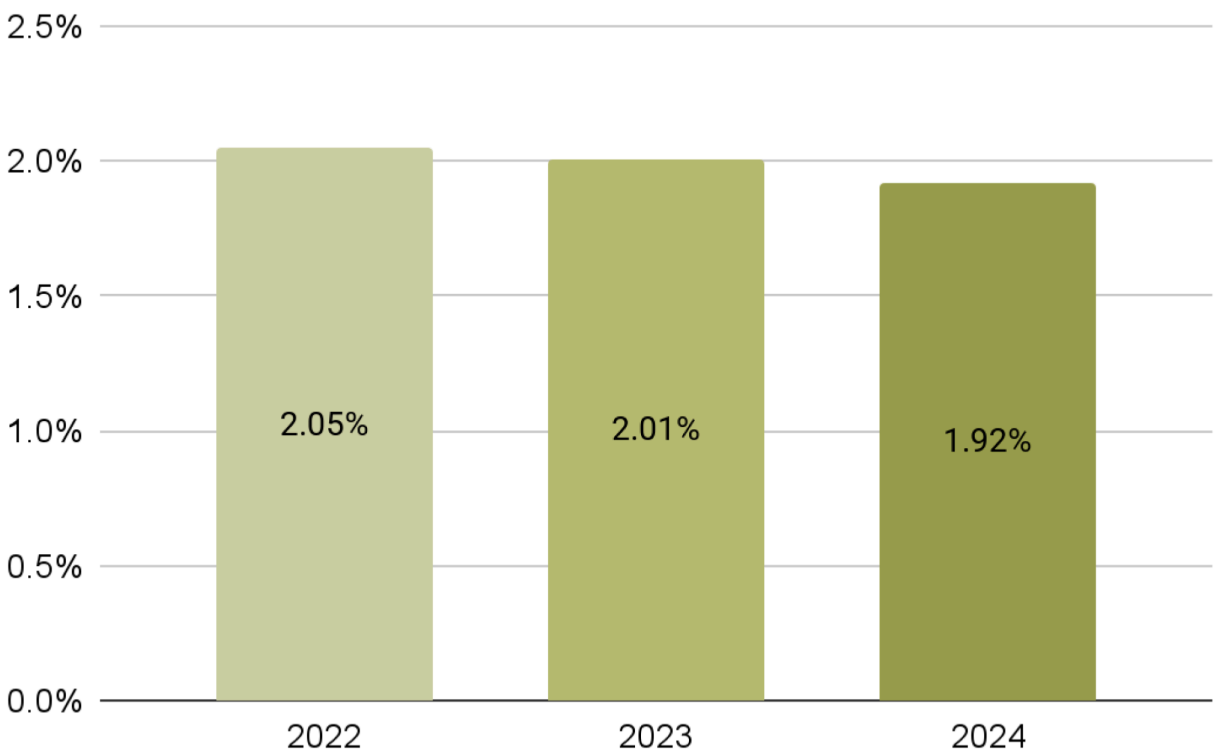
Italy plant-based yoghurt sales by flavour, 2022-2024 (% of sales volume)



Market share

The market share of plant-based yoghurt has decreased from 2.05% of overall volume in 2022 to 1.92% in 2024.

Plant-based yoghurt: share of Italy's total (plant- and animal-based) yoghurt market, 2022-2024 (% of sales volume)



Price trends relative to animal equivalent

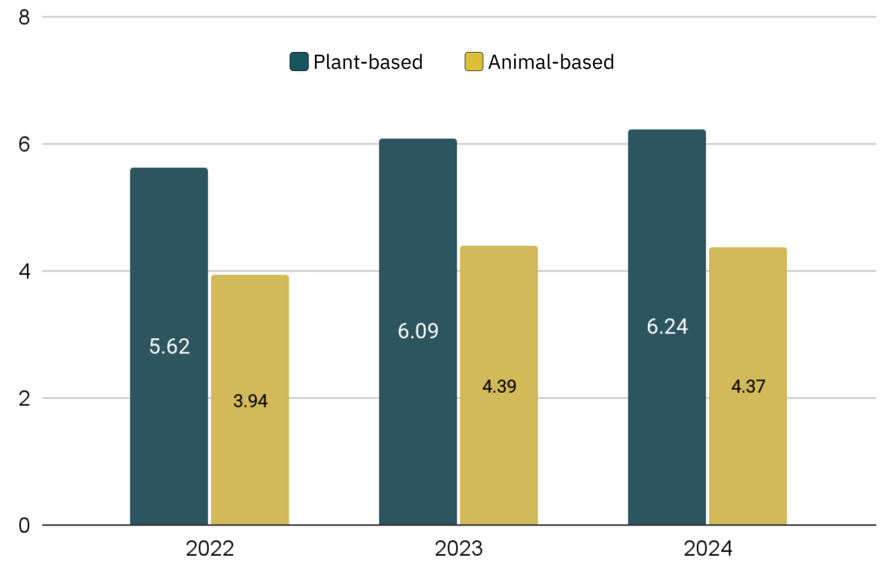
The price premium of plant-based yoghurt relative to animal-based yoghurt dipped from 43% in 2022 to 39% in 2024, before returning to 43% in 2024.

This trend was driven by an ongoing increase in the average price per kg of plant-based yoghurt, while the price of animal-based yoghurt stabilised between 2023 and 2024.

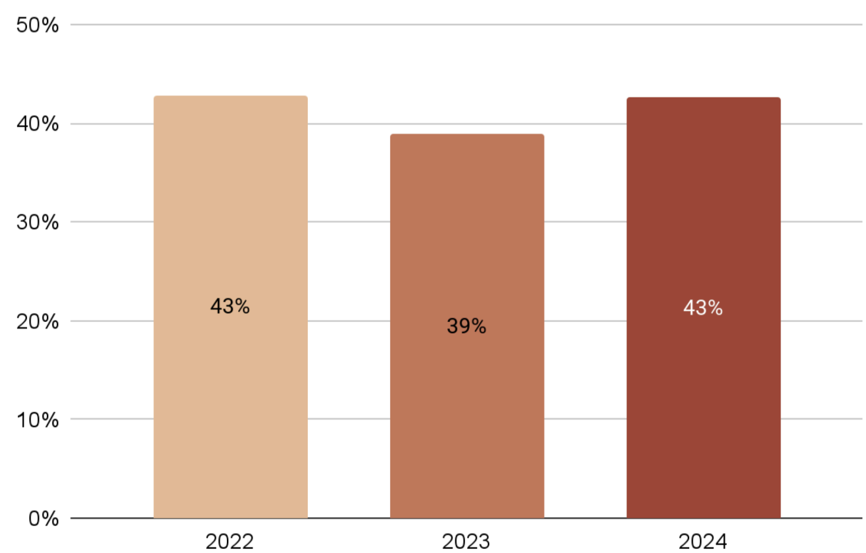
This price gap may be limiting growth in the plant-based yoghurt market. However, as shown above, private-label plant-based yoghurt has lost market share despite being much cheaper than both branded plant-based yoghurt and branded animal-based yoghurt.

This suggests that private-label plant-based yoghurt may not yet be meeting consumers’ expectations for taste or texture.

Average price per kg for plant-based and animal-based yoghurt in Italy, 2022-2024 (€/kg)



Price difference for plant-based yoghurt compared to animal-based yoghurt, 2022-2024 (% difference based on €/kg)



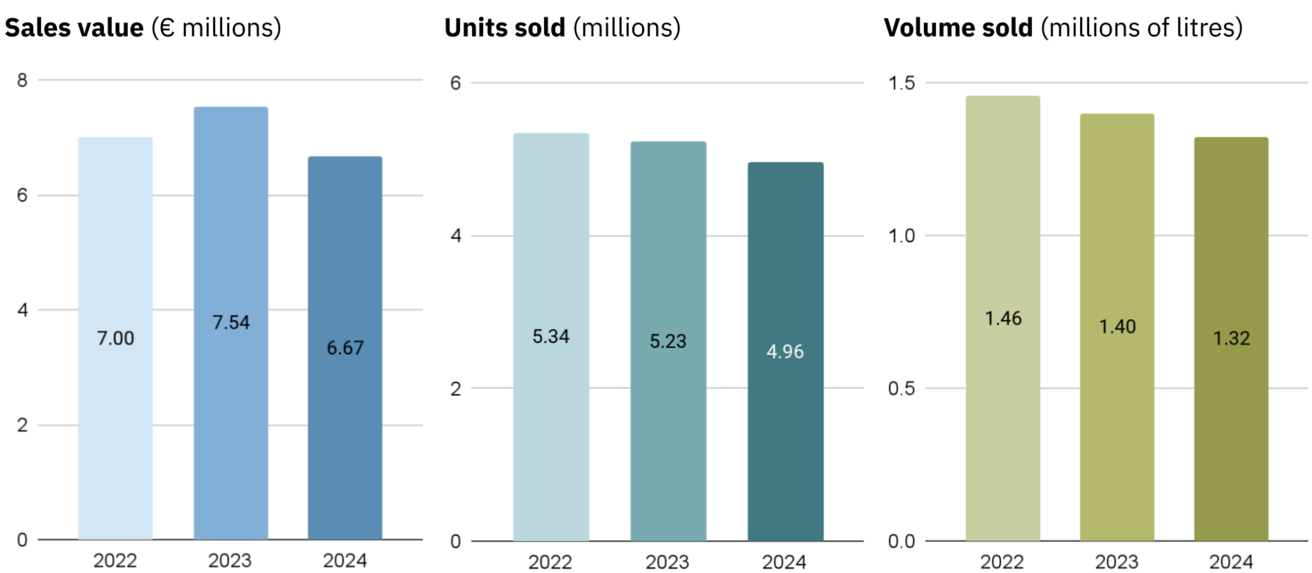
Plant-based cream

Total market

Italy's plant-based cream market has shrunk despite the product being cheaper than animal-based cream, but there are signs that the product selection is becoming slightly more diverse.

Between 2022 and 2024, sales value fell by 4.7% to €6.67 million, following a peak of €7.54 million in 2023. Unit sales fell by 7.1% to 4.96 million, and sales volume fell by 9.1% to 1.32 million litres.

Plant-based cream sales in Italy, 2022-2024

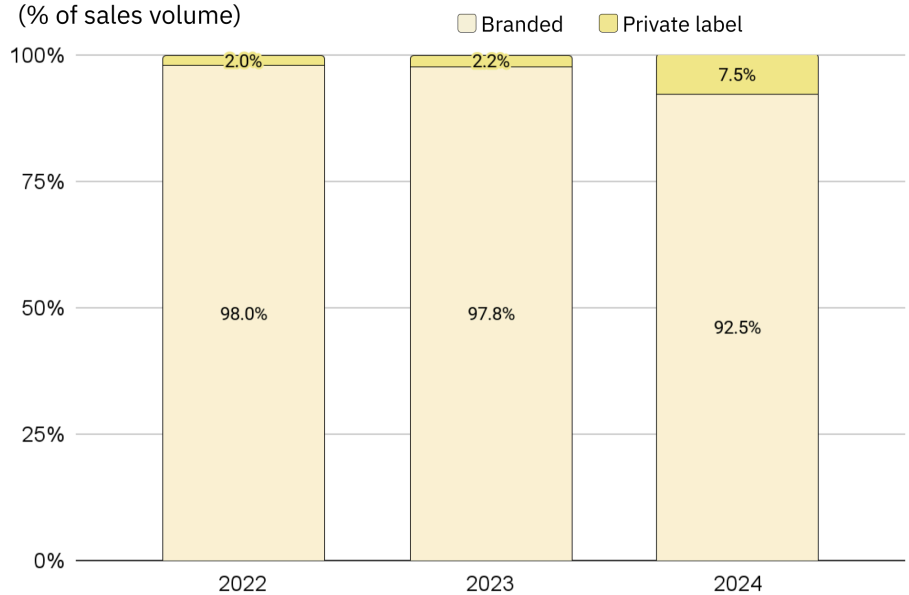


Branded versus private label

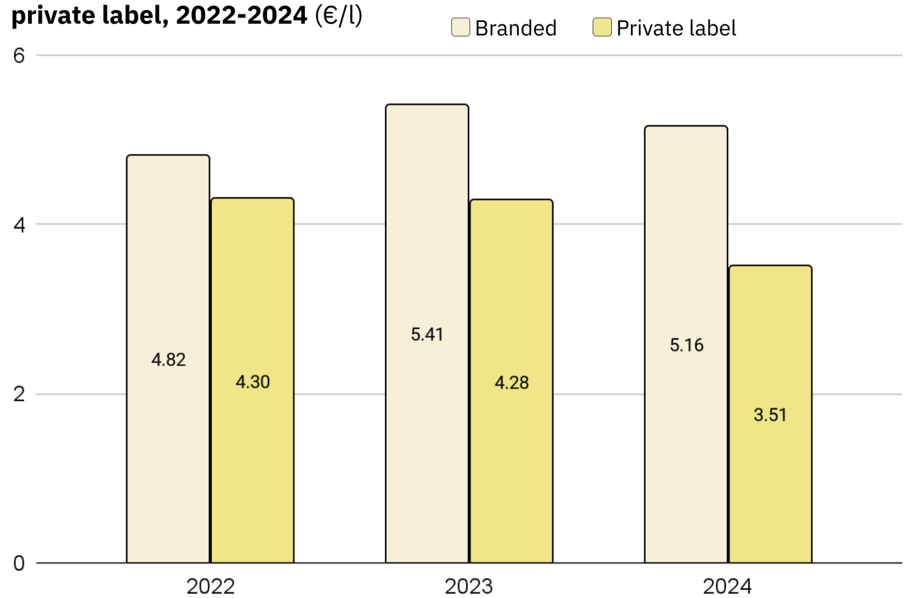
Although Italy's plant-based cream market is dominated by branded products, in 2024, private-label options made some headway, rising to 7.5% of sales volume (from 2.2% in 2023).

Private-label plant-based cream was 32% cheaper than branded plant-based cream in 2024 – a gap that has increased over time.

Italy plant-based cream sales by branded or private label, 2022-2024
(% of sales volume)



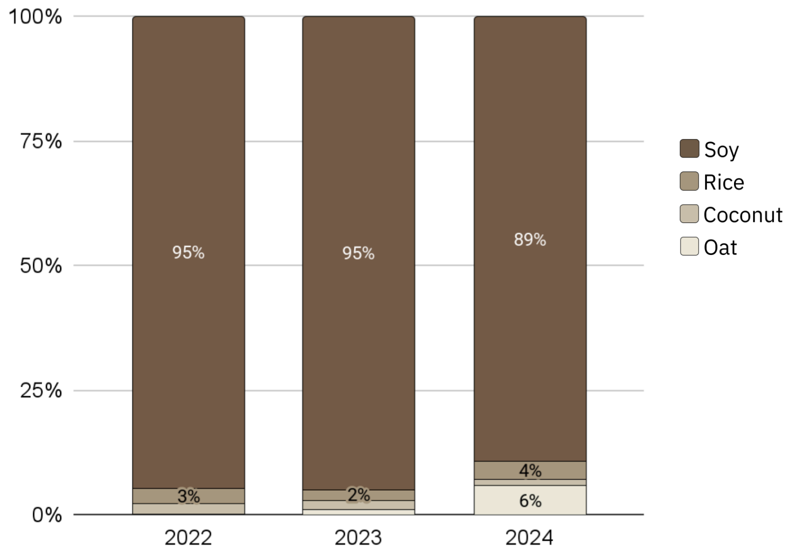
Average price per litre of plant-based cream in Italy, by branded or private label, 2022-2024 (€/l)



Product format breakdown

Although most of Italy's plant-based cream market consists of soy cream, other ingredient bases made progress between 2023 and 2024. Notably, oat cream achieved 6% of sales volume in 2024.

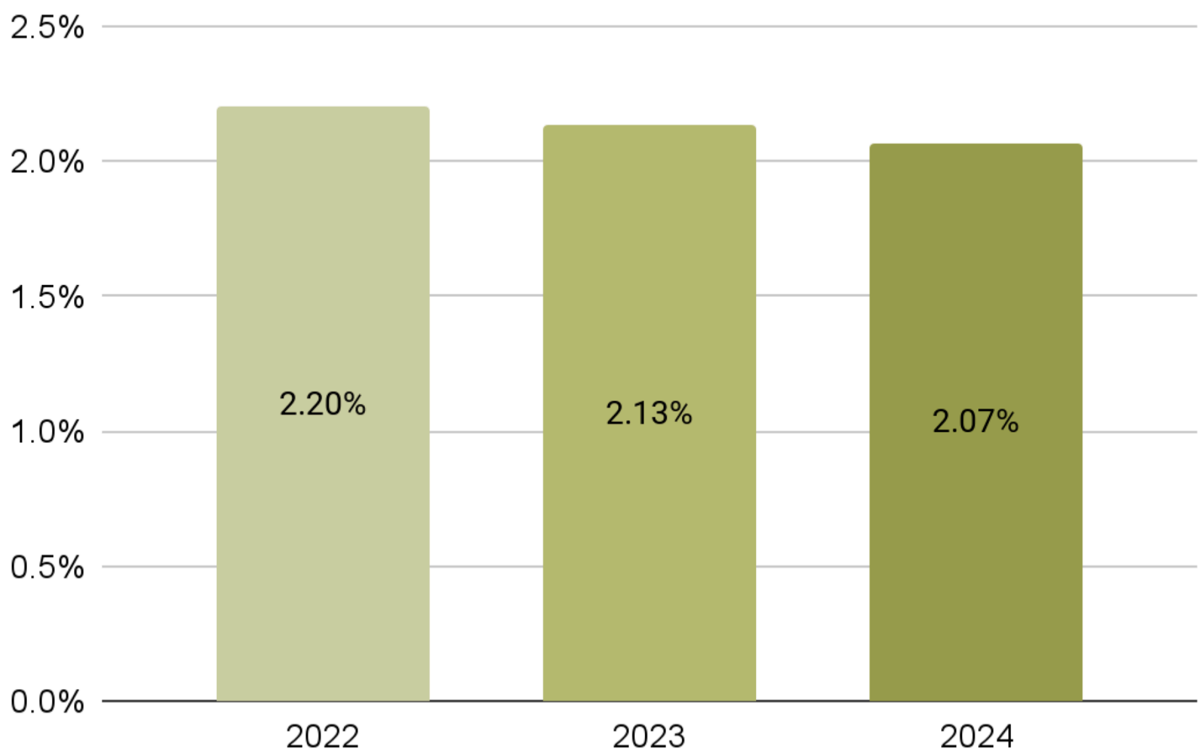
Italy plant-based cream sales by ingredient base, 2022-2024
(% of sales volume)



Market share

The market share of plant-based cream, as a proportion of total cream sales in Italy (both plant-based and animal-based), has fallen from 2.20% in 2022 to 2.07% in 2024 despite the relative affordability of plant-based cream.

Plant-based cream: share of Italy's total (plant- and animal-based) cream market, 2022-2024 (% of sales volume)



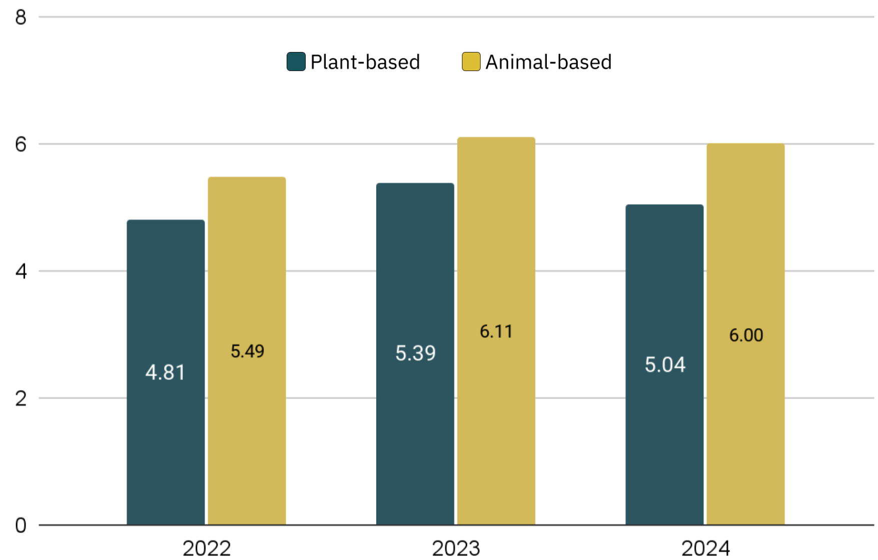
Price trends relative to animal equivalent

Plant-based cream was cheaper per litre than dairy cream, with the gap rising from 12% cheaper in 2022 and 2023 to 16% cheaper in 2024.

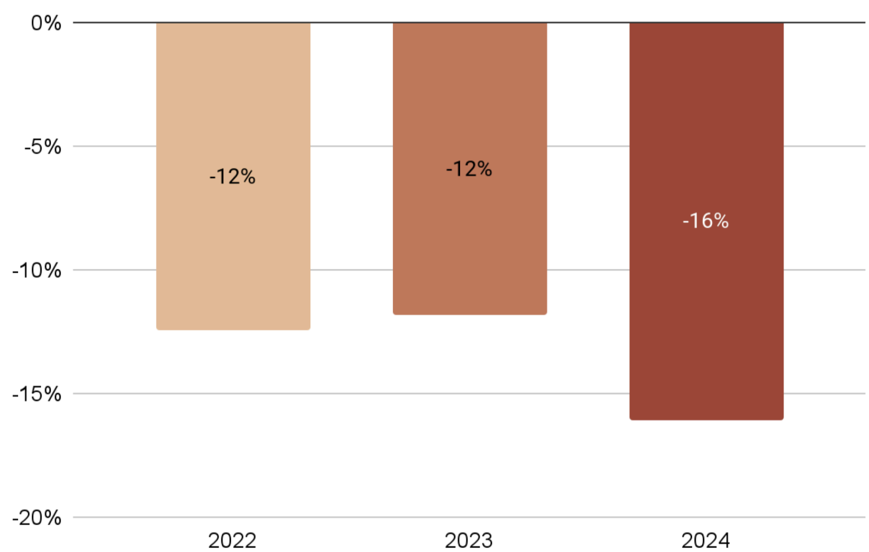
In 2024, branded plant-based cream was 26% cheaper per litre than branded animal-based cream, and private-label plant-based cream was 29% cheaper than private-label animal-based cream.

The fact that plant-based sales volumes have fallen despite this price advantage shows that price parity alone is not sufficient. Since Italy's plant-based cream market has lacked diversity, being heavily skewed towards soy cream, it is possible that the present selection of products does not meet consumers' needs. The diversification happening in 2024 is promising, suggesting that consumers perhaps need greater choice in order to find a product that meets their individual needs and expectations. It is also possible that plant-based cream needs to be made more visible in shops, to make more consumers aware of this relatively affordable option.

Average price per litre for plant-based and animal-based cream in Italy, 2022-2024 (€/l)



Price difference for plant-based cream compared to animal-based cream in Italy, 2022-2024 (% difference based on €/l)



Closing remarks

Italy's plant-based sector is growing steadily, with sales of the two largest categories – milk and drinks, and meat – being buoyed by the growing private-label segment, which offers relatively affordable prices.

However, price alone is not sufficient to draw consumers in, as shown by the plant-based cream category, where sales are falling despite animal-based cream being more expensive. With price inflation in Italy's food sector having receded from its peak in 2022, price may now be a less decisive factor.

Meanwhile, the strong performance of plant-based cheese, which saw sales value double between 2022 and 2024, has been driven by relatively expensive branded products. This further demonstrates that other factors such as taste are likely playing a stronger role than price, particularly for early adopters of this small emerging category, who may also be more strongly motivated by factors such as sustainability or animal welfare.

To reach a wider market, the plant-based sector needs to meet consumers' expectations on *both* price and taste.

Helen Breewood,
Senior Market and Consumer Insights Manager at the Good Food Institute Europe

The plant-based market in Italy continues to grow, confirming a significant shift in consumer habits observed in recent years.

To support and strengthen this trend, the industry must focus on making products even more tasty, nutritious and affordable. Policy support is also essential to fully unlock the sector's potential, fostering synergies with farmers and promoting the use of Italian agricultural inputs.

If supported with a systemic vision, plant-based meat, seafood, eggs and dairy present a real opportunity to combine innovation, consumer wellbeing, sustainability, and circularity – ultimately strengthening the country's food sovereignty.

Francesca Gallelli,
Policy Manager, Italy, at the Good Food Institute Europe

About the Good Food Institute Europe

The Good Food Institute Europe is a nonprofit and think tank helping to build a more sustainable, secure and just food system by diversifying protein production.

We champion the science, policies and investment needed to make alternative proteins delicious, affordable and accessible across Europe.

By advancing plant-based foods, cultivating meat from cells and producing ingredients through fermentation, we can boost food security, meet our climate targets and support nature-friendly farming. GFI Europe is powered by philanthropy.

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