

2023 - 2025

# Italy plant-based food retail market insights

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



Photo: FelsineoVeg

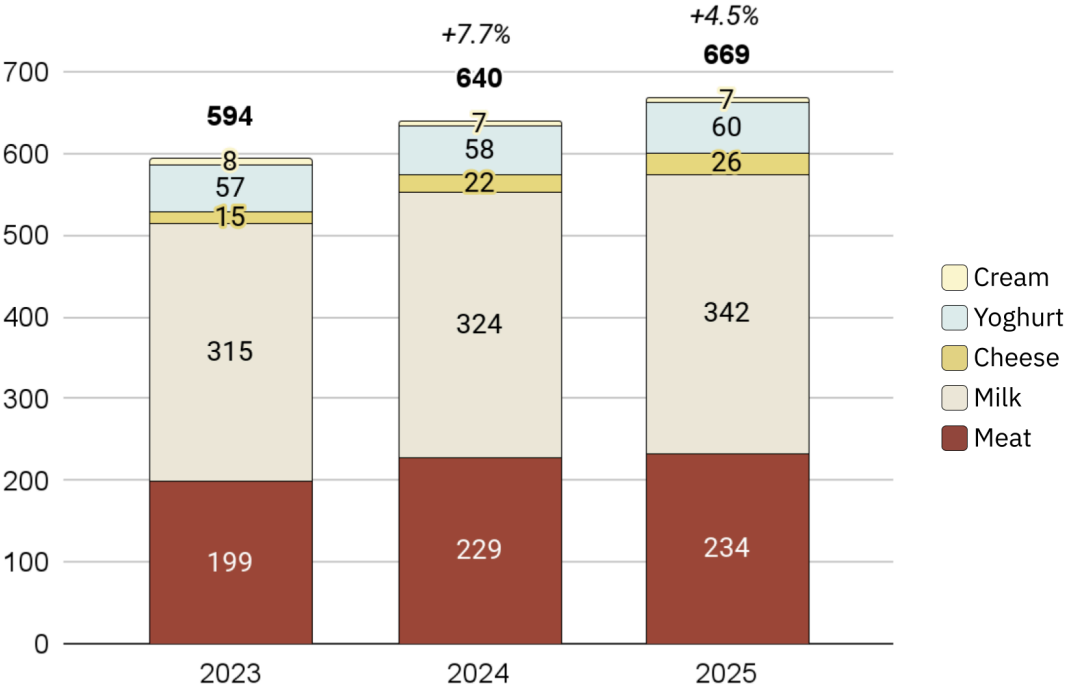
# Executive summary

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 2023 and 2025, based on data from Circana.

<p>The Italian retail market across <b>five categories</b> of plant-based food was valued at <b>€669 million in 2025</b>.</p>	<p>The total annual sales <b>value</b> of plant-based foods across five categories in Italy <b>grew by 4.5%</b> in 2025.</p>	<p>The total annual sales <b>volume</b> of plant-based foods across five categories in Italy <b>grew by 5.8%</b> in 2025.</p>
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Italy’s plant-based market saw ongoing overall growth in sales value, unit sales and sales volume between 2023 and 2025. The sales volume of all five plant-based categories in this report (meat, milk and drinks, cheese, yoghurt and cream) grew in 2025.

**Plant-based food sales value by category in Italy, 2023-2025**  
(€ millions)



Sales value across these five plant-based categories totalled €669 million in 2025 – an increase of 4.5% compared with 2024 and of 12.5% compared with 2023. The concurrent increase in unit sales and sales volume indicates that the sector’s growth is driven by increased demand, rather than inflation. Indeed, in all categories except for plant-based yoghurt and cheese, the average cost per kg fell slightly between 2023 and 2025, despite ongoing [inflation](#) in Italy’s wider food sector.

<b>Branded</b> plant-based sales volume rose <b>1.9% in 2024</b> and <b>5.0% in 2025</b> .	<b>Private-label</b> plant-based sales volume rose <b>11.9% in 2024</b> and <b>6.7% in 2025</b> .
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Inflation rates in Italy have fallen significantly since their peak during the inflationary shock of late 2022 to early 2023, with Banca d'Italia [reporting](#) that household purchasing power had returned to roughly pre-crisis levels by 2025. This easing of pressure on consumer budgets might explain why the growth rate of more affordable private-label products slowed between 2024 and 2025, and why branded sales volume saw an increased growth rate between 2024 and 2025. However, private-label sales still grew faster than those of branded products in 2025, indicating that affordability remains an important consideration.

Plant-based milk and drinks was the most well-established plant-based category in Italy, with the largest sales value, the highest market share, and ongoing growth despite still being more expensive than animal-based milk.

<b>Plant-based milk and drinks in 2025:</b>			
<b>€342 million</b> annual sales value	<b>8.5%</b> of overall plant- and animal-based milk sales volume	<b>6.2%</b> <b>year-on-year growth</b> in sales volume	<b>45% more expensive per litre</b> than animal-based milk

Plant-based meat was the second largest category in 2025, at €234 million. Sales volume grew by 4.1% in 2025, though this marked a deceleration compared with 16.3% growth in 2024.

Plant-based cheese maintained double-digit growth in sales volume (15.6% in 2025), although this was lower than the 2024 growth rate, and the category’s market share remained tiny, at just 0.3% of total plant- and animal-based cheese sales.

The sales volume of plant-based yoghurt remained roughly level between 2023 and 2025.

Plant-based cream experienced a rebound in sales volume, rising 2.9% in 2025 after a dip in 2024, though it did not reach the levels seen in 2023.

This year's report features a new chapter on **tofu, tempeh and seitan**. These products are not classed as plant-based meat or counted towards the plant-based total because they are not marketed explicitly as analogues of specific animal-based products. Their rapid growth between 2023 and 2025 (up by 73% in sales volume) makes them an interesting comparison to plant-based meat, which does aim to replicate meat's taste and texture. However, it is worth noting that the sales volume of plant-based meat was 4.3 times higher than tofu, tempeh and seitan combined in 2025.

### Overview of plant-based food sales by category in Italy, 2023-2025

	Sales value			Unit sales			Sales volume		
	2025, € million	2024-25 change	2023-25 change	2025, million units	2024-25 change	2023-25 change	2025, million kg	2024-25 change	2023-25 change
Meat	233.9	2.0%	17.4%	95.9	5.0%	26.3%	17.8	4.1%	21.1%
Milk and drinks	341.7	5.6%	8.4%	180.2	6.6%	13.2%	170.5	6.2%	12.4%
Cheese	25.9	17.1%	69.7%	10.7	16.6%	58.5%	1.6	15.6%	65.9%
Yoghurt	60.5	3.7%	6.1%	43.6	5.2%	9.3%	9.5	1.9%	1.7%
Cream	6.9	3.6%	-8.3%	5.2	5.0%	-0.5%	1.4	2.9%	-2.7%
<b>Total</b>	<b>668.8</b>	<b>4.5%</b>	<b>12.5%</b>	<b>335.7</b>	<b>6.2%</b>	<b>16.9%</b>	<b>200.7</b>	<b>5.8%</b>	<b>12.7%</b>

*Data on additional products that are not counted towards the plant-based total*

Tofu, tempeh and seitan	40.1	22.0%	63.2%	19.4	25.7%	81.6%	4.1	23.9%	72.7%
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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 2023, 2024 and 2025 covers the following dates:

- 2023: 2 January 2023 until 31 December 2023
- 2024: 1 January 2024 until 29 December 2024
- 2025: 30 December 2024 until 28 December 2025

Note that due to ongoing refinement and backdating of the dataset by Circana, the figures reported here are not directly comparable with those in the previous edition of this report.

## 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:** foods 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 do not replicate 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 replicate 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

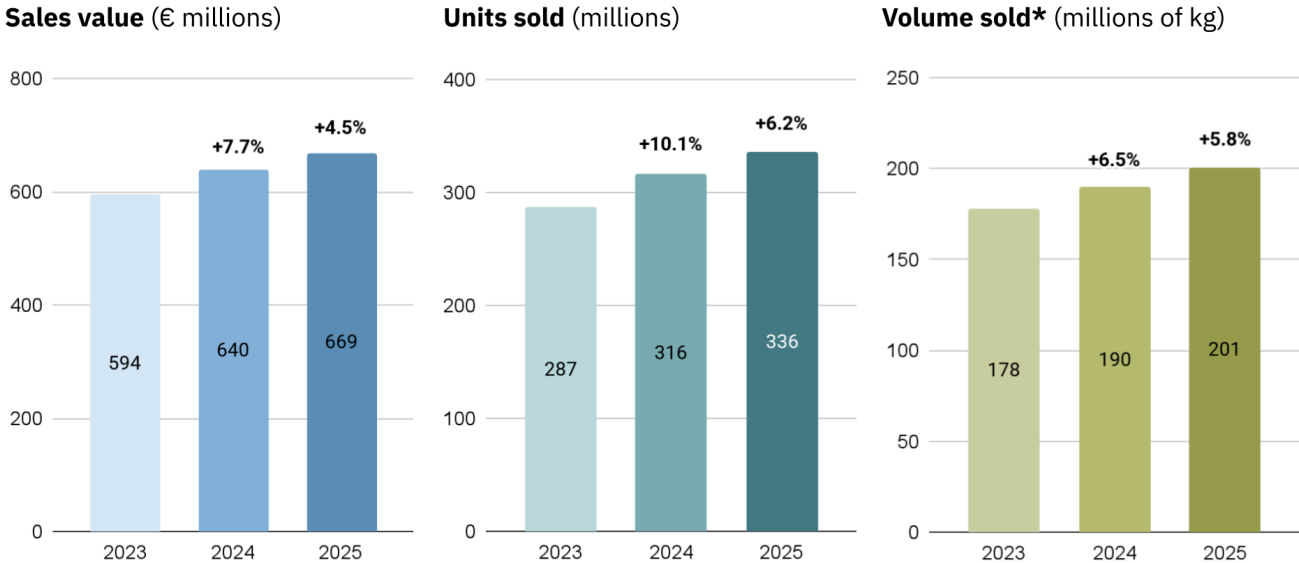
Italy's total plant-based market continued to grow steadily in 2025, with growth across all of the plant-based categories included in this report.

Between 2023 and 2025, the combined annual sales value of five plant-based categories (meat, milk and drinks, cheese, yoghurt and cream) grew by 12.5%, reaching €669 million in 2025.

Unit sales grew 16.9% over the same time period, reaching 336 million in 2025. Sales volume rose 12.7% to 201 million kg between 2023 and 2025.

The rate of growth in value and units fell between 2024 and 2025, but sales volume growth was steadier, with only a small decline in growth rate.

## Plant-based food sales across five categories in Italy, 2023-2025



\*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.

## Categories

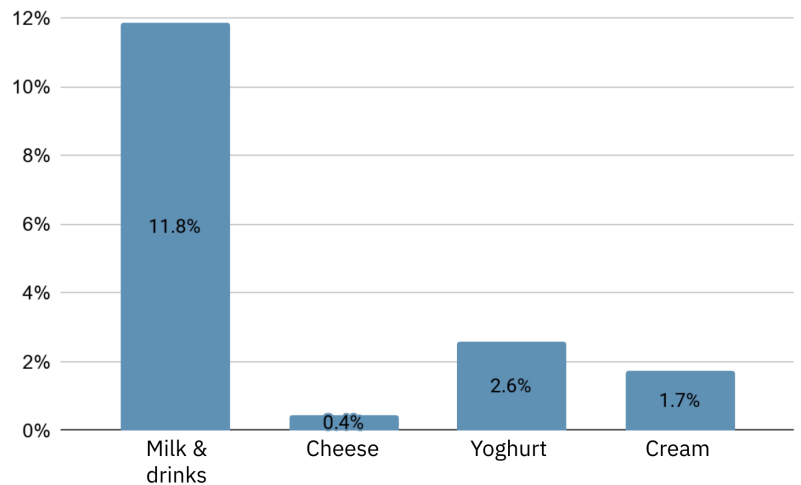
Plant-based milk and drinks led Italy's plant-based sector, at 51% of sales value in 2025.

This category is also well-established, accounting for 11.8% of total (animal- and plant-based) milk sales value and 8.5% of total milk sales volume in 2025.

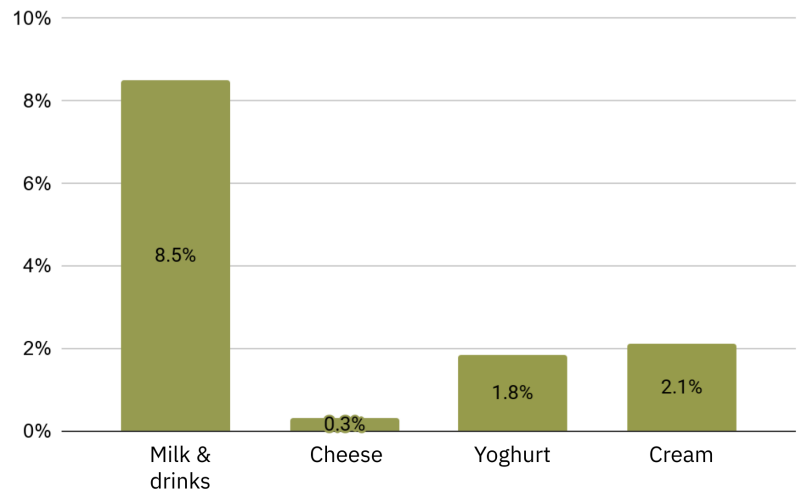
Plant-based meat was the second-largest category, at 35% of sales value in 2025. It was not possible to calculate a market share relative to animal-based meat using the available data.

Plant-based cheese was the fastest-growing category, increasing by 17% in sales value in 2025, but it also had the smallest market share, at just 0.3% of total cheese sales volume.

**Plant-based food: share of Italy's total pre-packaged (plant- and animal-based) sales for each category, 2025 (% of sales value)**

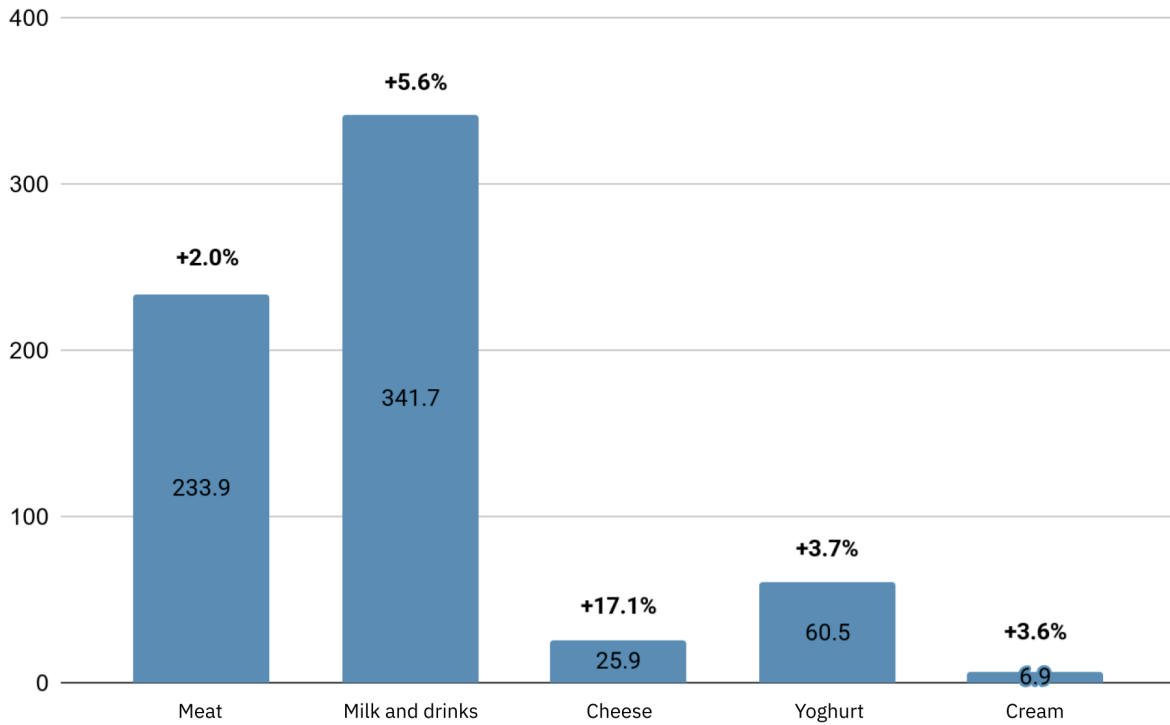


**Plant-based food: share of Italy's total pre-packaged (plant- and animal-based) sales for each category, 2025 (% of sales volume)**



### Plant-based food sales value and growth rates\* by category in Italy, 2025

(€ millions)



\* The percentages above each column denote the change in sales value of that category between 2024 and 2025.

## Branded versus private label

Branded products maintained their larger plant-based market share in 2025. However, sales of private-label products – also known as supermarket own-brand, ie, those sold under a retailer’s own label – grew faster than those of branded products between 2023 and 2024, possibly driven by their lower prices per kg.

The growth rate of private-label products slowed between 2024 and 2025, but still outpaced the steadier growth of branded products. The slowing of private-label growth might be driven by lower pressure on consumer budgets: the rate of [inflation](#) in Italy’s broader food sector was lower in 2024 and 2025 than the peak seen in late 2022 and early 2023, and consumer purchasing power had [recovered](#) to pre-crisis levels by 2025.

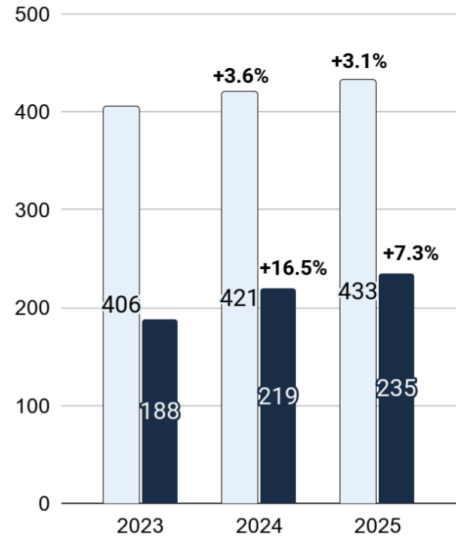
Private-label products accounted for a higher proportion of overall sales volume than of sales value, partly because of their lower average price per kg, and partly because of their success in the plant-based milk and drinks sector, where products are generally larger per unit than for other plant-based categories.

### Plant-based sales and growth rates across five product categories in Italy, branded versus private label, 2023-2025

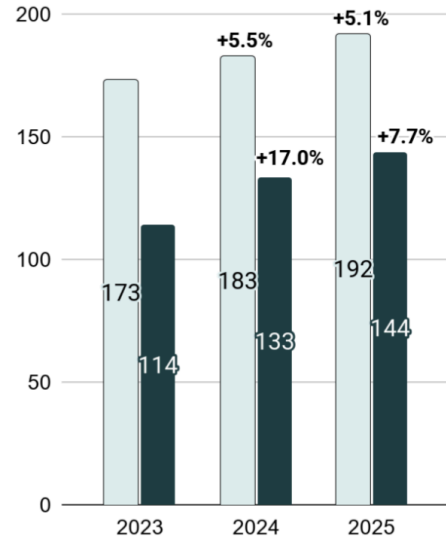
	Sales value			Unit sales			Sales volume		
	2025, € million	2024-25 change	2023-25 change	2025, million units	2024-25 change	2023-25 change	2025, million kg	2024-25 change	2023-25 change
Branded	433.4	3.1%	6.8%	191.9	5.1%	10.9%	102.3	5.0%	7.0%
Private label	235.4	7.3%	24.9%	143.7	7.7%	26.0%	98.4	6.7%	19.4%

# Plant-based food sales across five categories in Italy, branded versus private label, 2023-2025

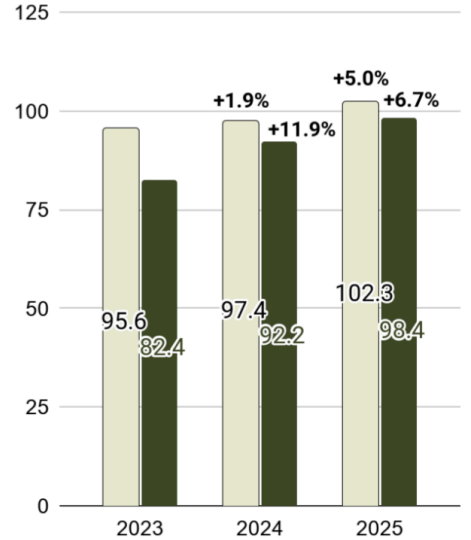
Sales value (€ millions)



Units sold (millions)



Volume sold (millions of kg)



Branded Private label

Branded Private label

Branded Private label

\*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

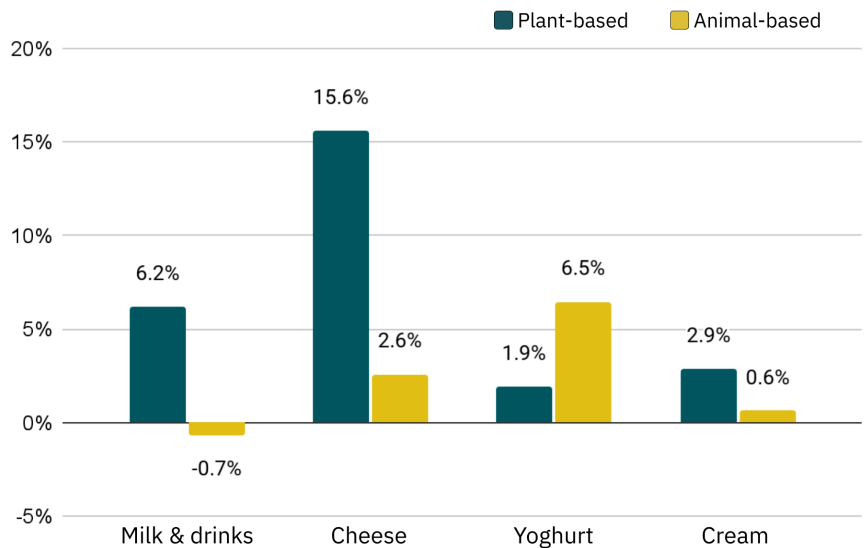
Retail sales trends were available for animal-based equivalents in four product categories (milk and drinks, cheese, yoghurt and cream), but not for meat.

Plant-based products experienced higher sales volume growth in percentage terms than their animal-based counterparts across three categories in 2025: milk and drinks (dairy milk fell 0.7%), cheese and cream.

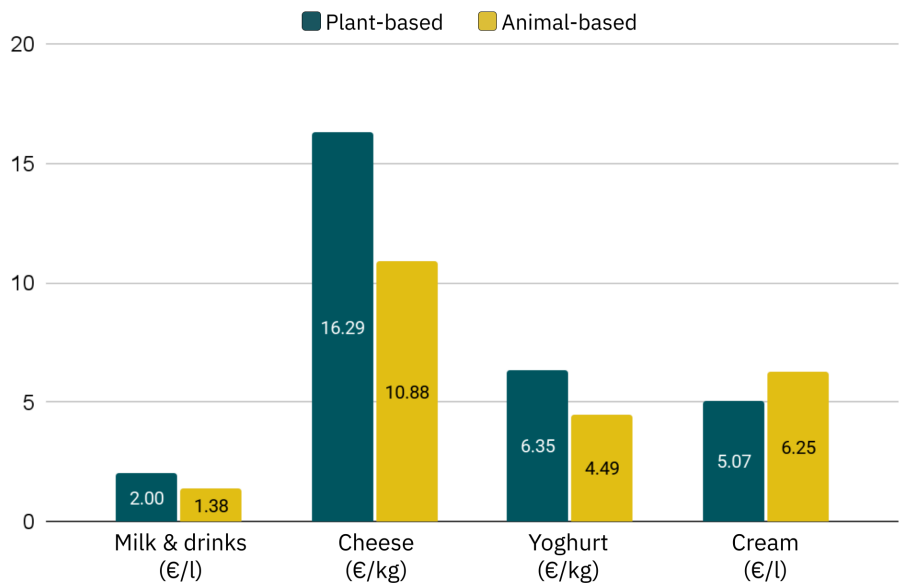
Note, however, that the much larger market size of animal-based products means that their changes in absolute sales volume are generally larger. For example, animal-based cheese grew 2.6% in sales volume in 2025, an increase of 13.6 million kg; plant-based cheese grew 15.6%, an increase of just 215,000kg.

Plant-based cream was cheaper per kg than animal-based cream in 2025; however, this was the exception, with the other three categories being on average more expensive than their animal-based counterparts.

**Change in the sales volume of pre-packaged plant- and animal-based foods in Italy, 2024-2025 (%)**



**Average price per kg or litre of plant- and animal-based foods in Italy, 2025 (€ per kg or litre)**



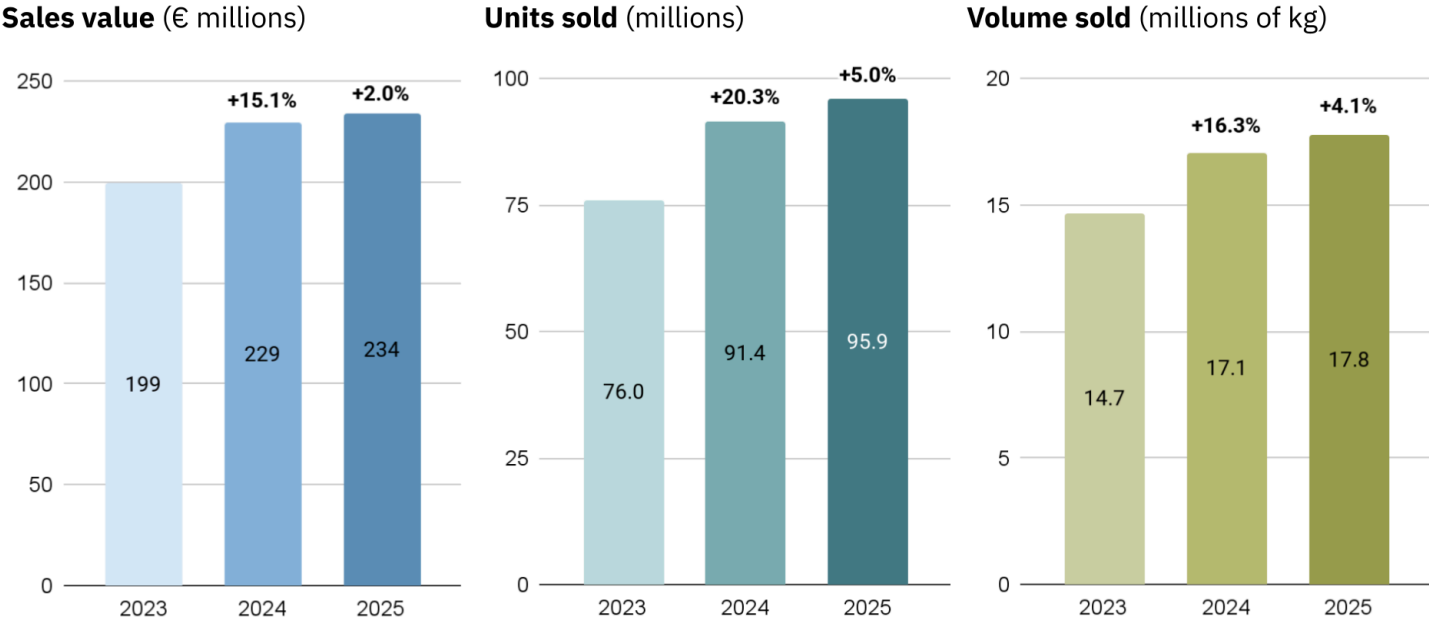
# Plant-based meat

## Total market

Italy’s market for plant-based meat<sup>1</sup> continued to grow in 2025, although the rate of growth was lower than in 2024.

During 2025, annual sales value rose by 2.0% to €234 million – an increase of 17.4% compared with 2023. Unit sales reached 95.9 million in 2025, up 5.0% compared with 2024 and up 26.3% compared with 2023. Sales volume was 17.8 million kg in 2025, an increase of 4.1% from 2024 and up by 21.1% from 2023. The fact that sales volume grew more than sales value in 2025 indicates a slight fall in average prices per kg.

## Plant-based meat sales in Italy, 2023-2025



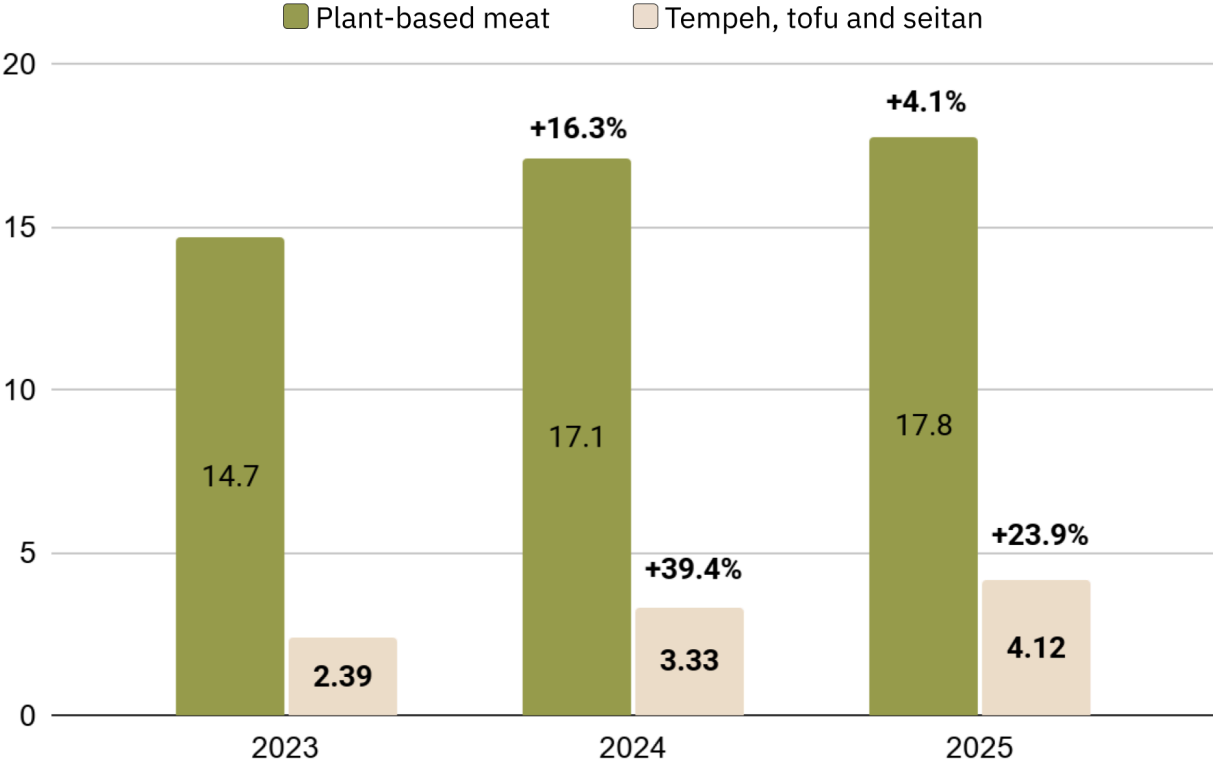
<sup>1</sup> Plant-based substitutes for meat that use formats similar to those of conventional meat products, such as burgers, sausages and meatballs. The data does not permit a full isolation of only the products that are intended to replicate the taste and texture of animal-based meat. The plant-based meat category in this report may therefore contain some products such as bean burgers that do not replicate meat. It does not, however, include tofu, tempeh or seitan, which are reported separately in the chapter “Spotlight on tofu, tempeh and seitan”.

The plant-based meat category does not include tofu, tempeh or seitan, which are reported in more detail in the next chapter, “Spotlight on tofu, tempeh and seitan”. By comparison, combined sales of tofu, tempeh and seitan experienced double-digit growth in both 2024 and 2025, but the growth rate slowed in 2025.

This growth might be driven by cost advantages: at just €8.35/kg, tofu (which made up three-quarters of sales volume in this category in 2025) was significantly cheaper than plant-based meat (€13.17/kg in 2025).

However, the sales volume of plant-based meat was 4.3 times higher than that of tofu, tempeh and seitan in 2025, indicating that products that use formats conventionally associated with meat (such as burgers) or aim to replicate meat’s taste and texture are still the leading choice for Italian consumers.

**Plant-based meat compared to tofu, tempeh and seitan in Italy, 2023-2025** (sales volume, million kg)



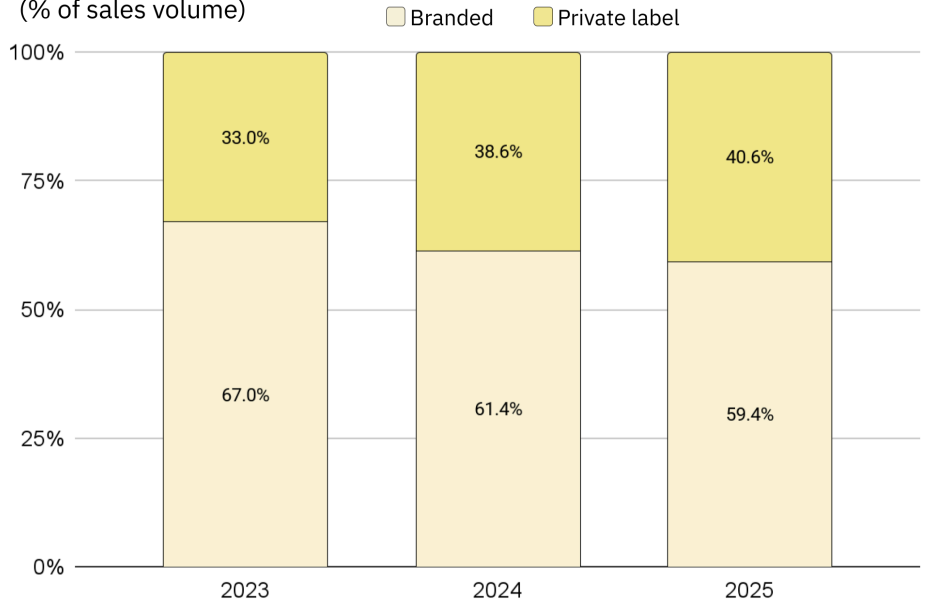
## Branded versus private label

Sales of private-label plant-based meat (products sold under a retailer’s own brand) increased steadily between 2023 and 2025, reaching 40.6% of sales volume.

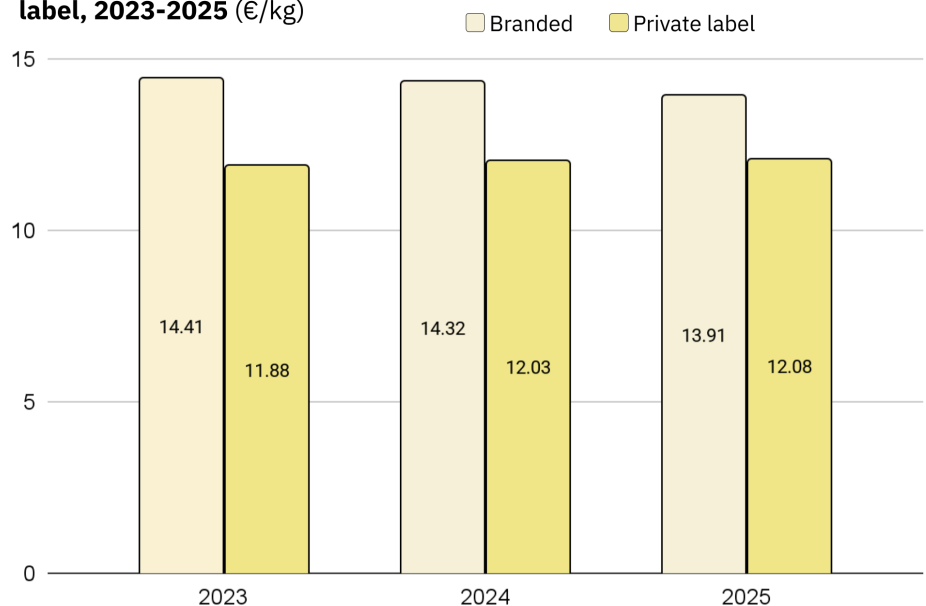
Private-label products had a slight price advantage over branded, although this reduced over time. In 2025, private-label products were 13% cheaper per kg.

The sales volume of branded products remained steady in 2025, while that of private-label products rose by 9.6%.

**Italy plant-based meat sales by branded or private label, 2023-2025**  
(% of sales volume)



**Average price per kg of plant-based meat in Italy, by branded or private label, 2023-2025 (€/kg)**



## Product format breakdown

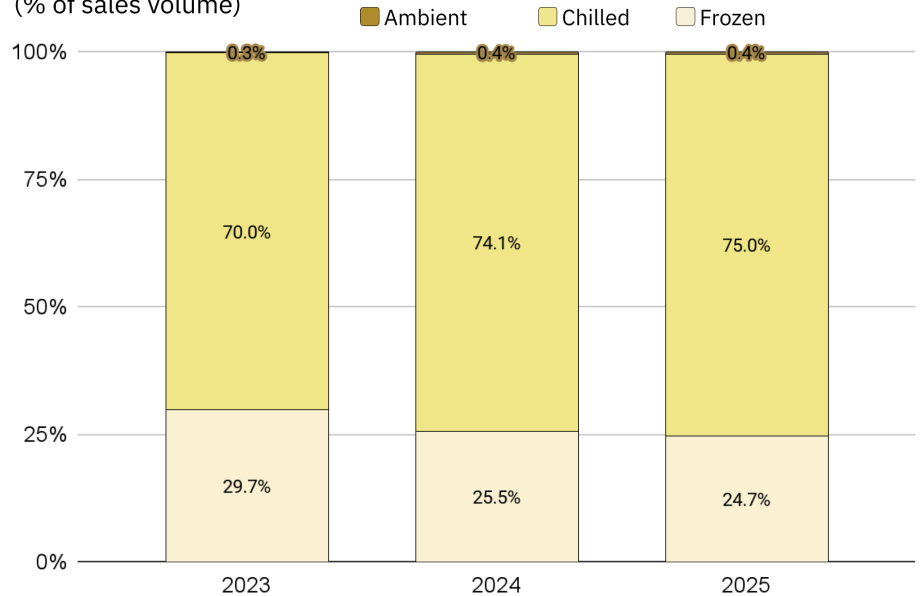
Chilled products accounted for three-quarters of the sales volume of plant-based meat in 2025, up from 70% in 2023.

Chilled products (€14.28/kg) were more expensive than frozen (€9.79/kg) in 2025.

The market is heavily skewed towards burgers, which accounted for 59.7% of sales volume in 2025. There were no major shifts in the market shares of each format in 2025.

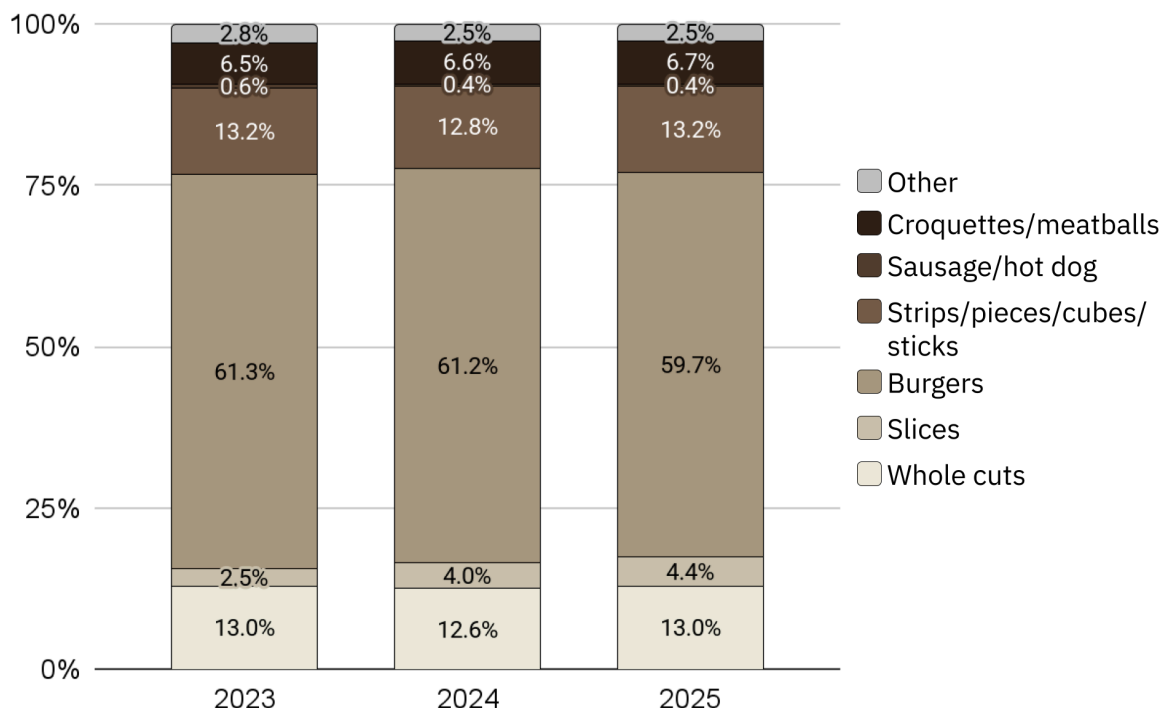
**Italy plant-based meat sales by temperature, 2023-2025**

(% of sales volume)



**Italy plant-based meat sales by format, 2023-2025**

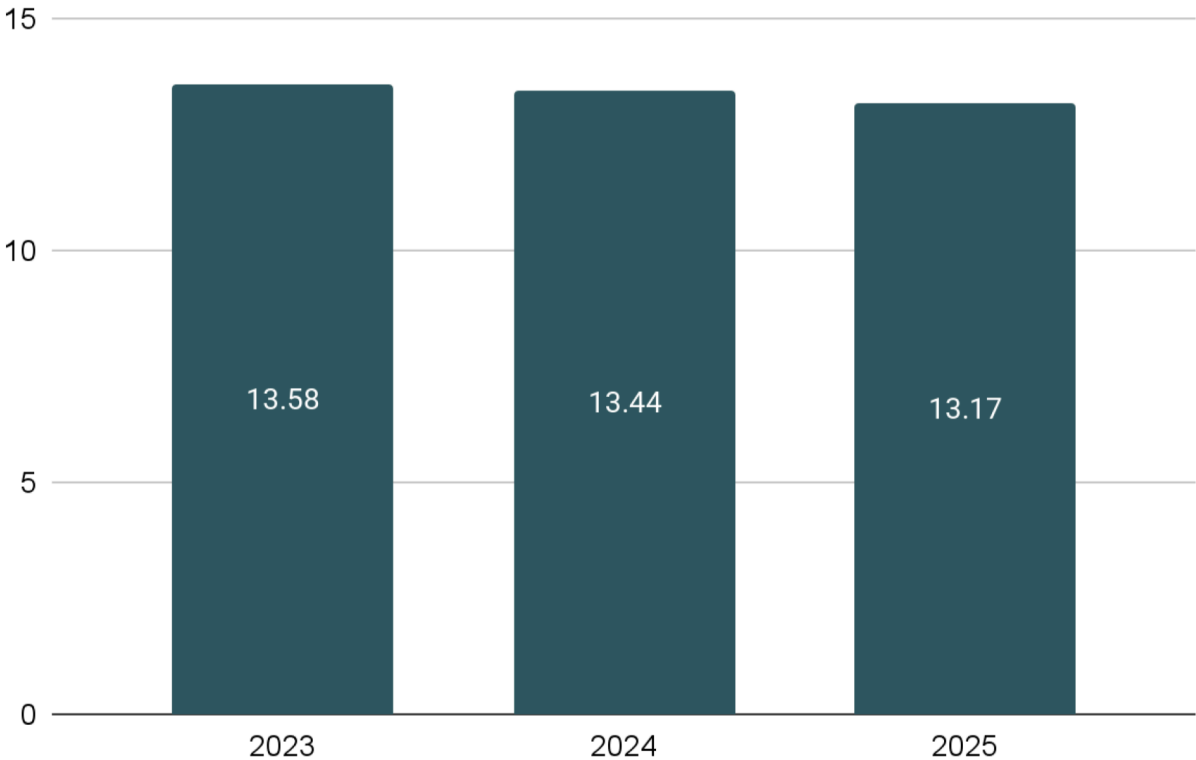
(% of sales volume)



### Price trends

The average price per kg of plant-based meat fell by 3% between 2023 and 2025, despite [inflation](#) across Italy’s broader food sector – suggesting these options are becoming more affordable as the plant-based sector develops.

**Average price per kg for plant-based meat in Italy, 2023-2025 (€/kg)**



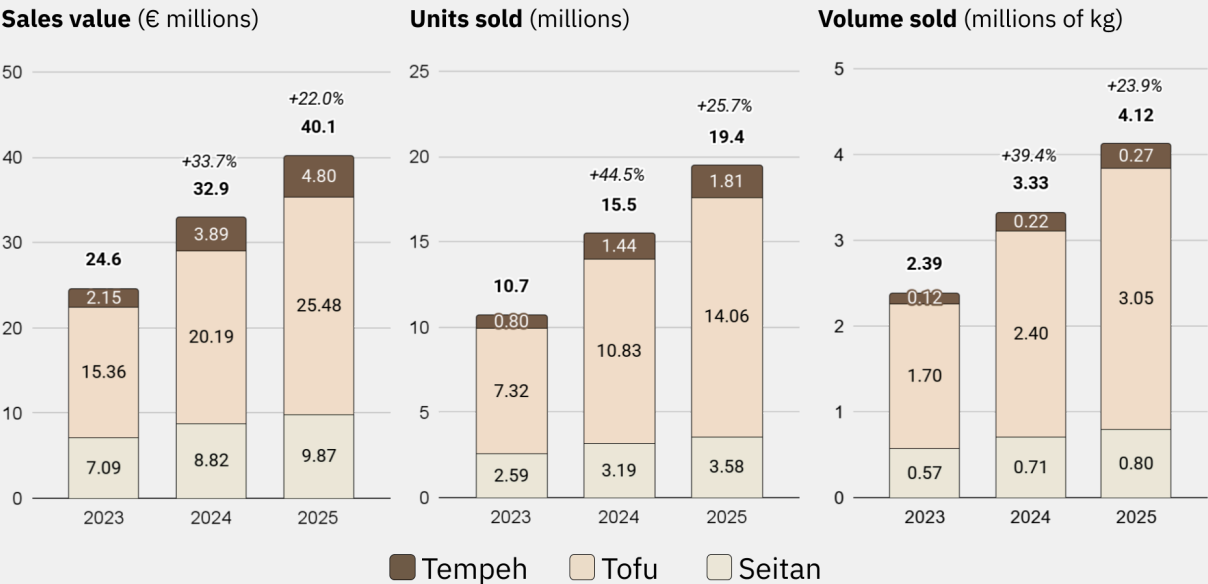
# Spotlight on tofu, tempeh and seitan

## Total market

Tofu, tempeh and seitan<sup>2</sup> are traditional foods with a long history in Asian cooking. They are not classed as plant-based meat in this report because, in the Italian market, they are not typically positioned as direct substitutes that aim to replicate the taste or texture of meat, in contrast to the newer wave of innovative plant-based meats that have grown in popularity over the past decade or so. However, they provide an interesting case study to compare with sales trends of plant-based meats that do aim to replicate the taste or format of meat.

The combined annual sales value of tofu, tempeh and seitan grew by 22% in 2025, reaching €40.1 million – an increase of 63% since 2023. Unit sales reached 19.4 million in 2025, up by 26% from 2024 and up by 82% since 2023. Sales volume grew by 24% in 2025 to 4.12 million kg – 73% above 2023 levels. However, the category remains smaller than plant-based meat, which had a sales volume 4.3 times higher than that of tofu, tempeh and seitan combined in 2025.

### Tofu, seitan and tempeh sales in Italy, 2023-2025



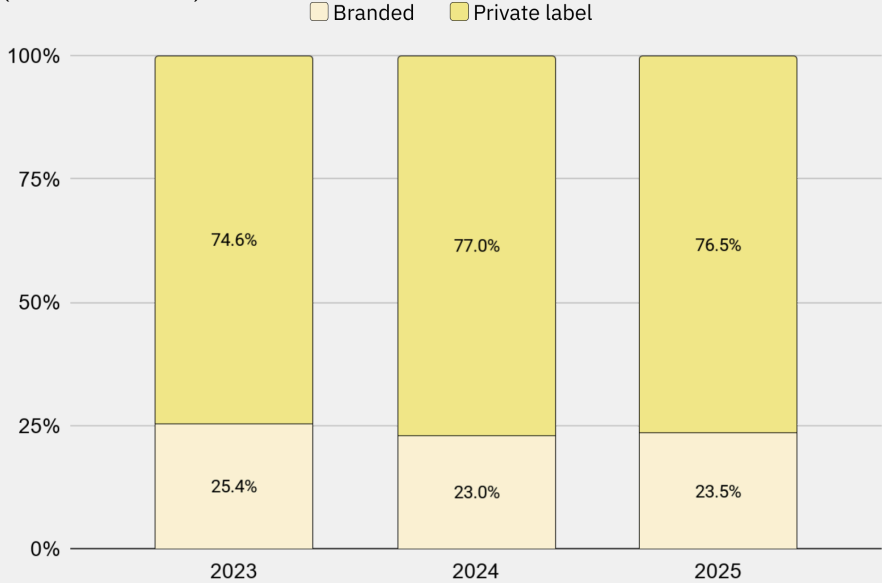
<sup>2</sup> Tofu is a product originating in China over 2,000 years ago, made from soy milk curds. Tempeh is a traditional Indonesian product made from fermented soybeans. Seitan is made from wheat gluten and historically used in various Asian cuisines.

# Branded versus private label

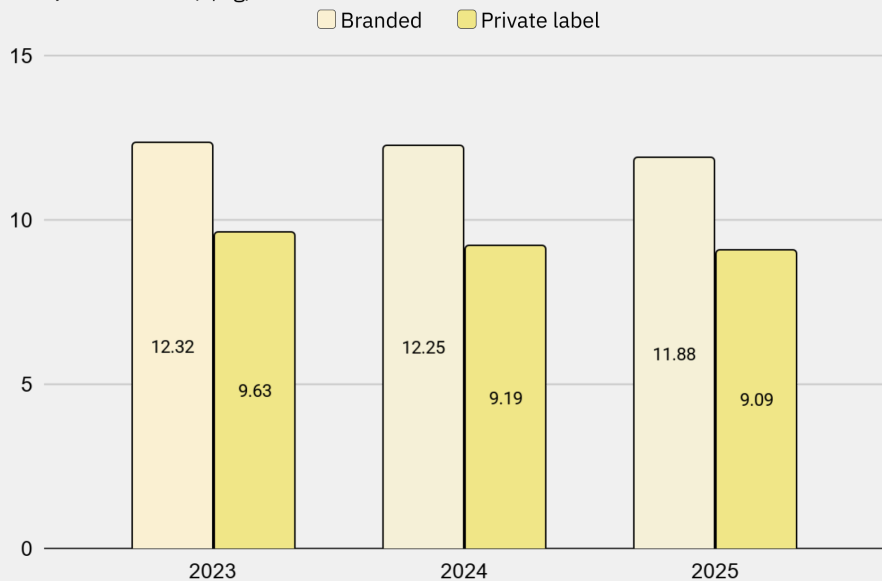
Private-label products accounted for over three-quarters of the combined sales volume of tofu, tempeh and seitan in 2025.

Private-label products were 24% cheaper per kg than branded products in 2025.

**Italy tofu, tempeh and seitan sales by branded or private label, 2023-2025**  
(% of sales volume)



**Average price per kg of tofu, tempeh and seitan in Italy, by branded or private label, 2023-2025 (€/kg)**



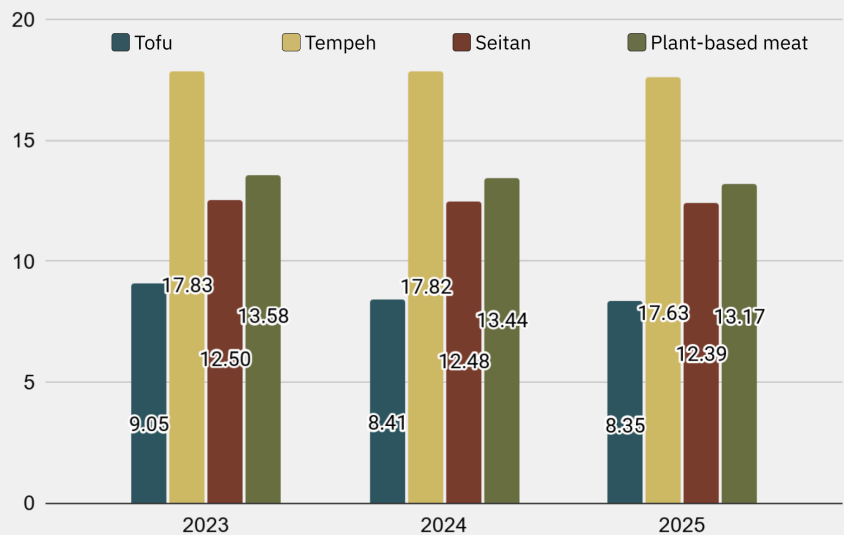
## Price trends

Tofu was consistently cheaper than tempeh, seitan and plant-based meat throughout 2023 to 2025, at an average of €8.35/kg in 2025. All four categories saw declining prices between 2023 and 2025, despite ongoing inflation across the broader food sector.

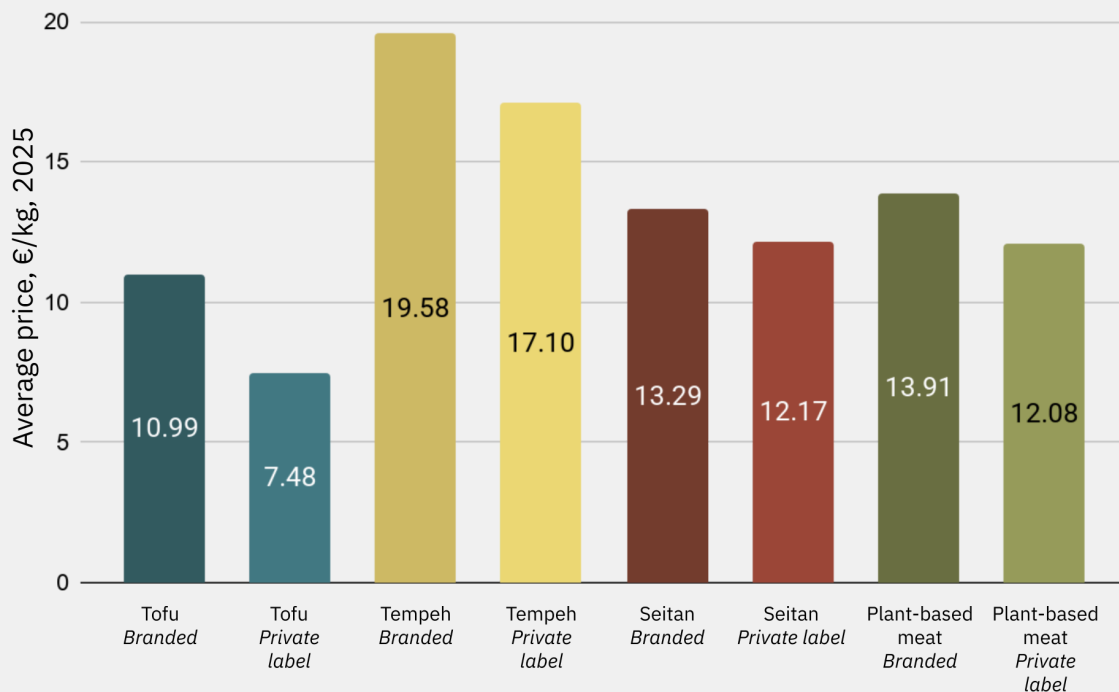
Private-label tofu was even cheaper, at €7.48/kg in 2025, while tempeh was considerably more expensive, and seitan cost slightly less than plant-based meat.

Tofu's affordability may explain its larger sales volume relative to tempeh and seitan. Tofu may also be more familiar to Italian consumers, as it is more widely available.

**Average price per kg for tofu, tempeh, seitan and plant-based meat in Italy, 2023-2025 (€/kg)**



**Average price per kg for tofu, tempeh, seitan and plant-based meat segments in Italy, by branded or private label, 2025 (€/kg)**



# Plant-based milk and drinks

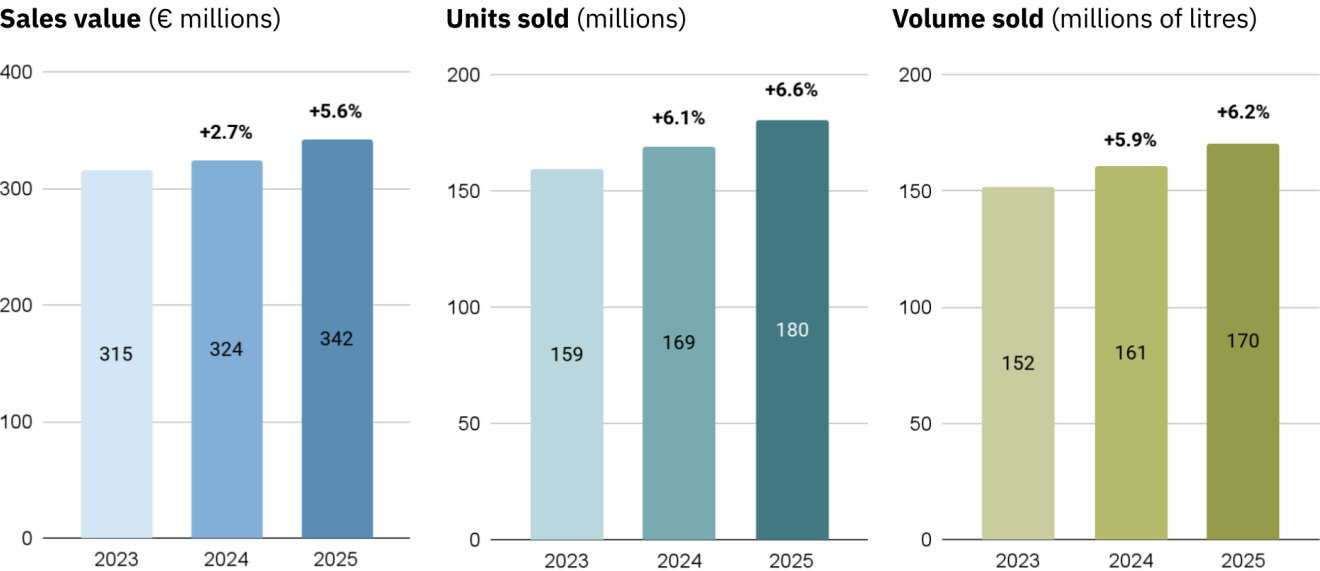
## Total market

Italy’s well-established plant-based milk and drinks category saw accelerated growth in 2025.

Sales value rose by 5.6% to €342 million in 2025, unit sales were up 6.6% to 180 million, and sales volume increased 6.2% to 170 million litres. All of these growth rates were higher than those seen in 2024.

The fact that sales volume outpaced sales value indicates that the average price per litre fell.

## Plant-based milk and drinks sales in Italy, 2023-2025



## Branded versus private label

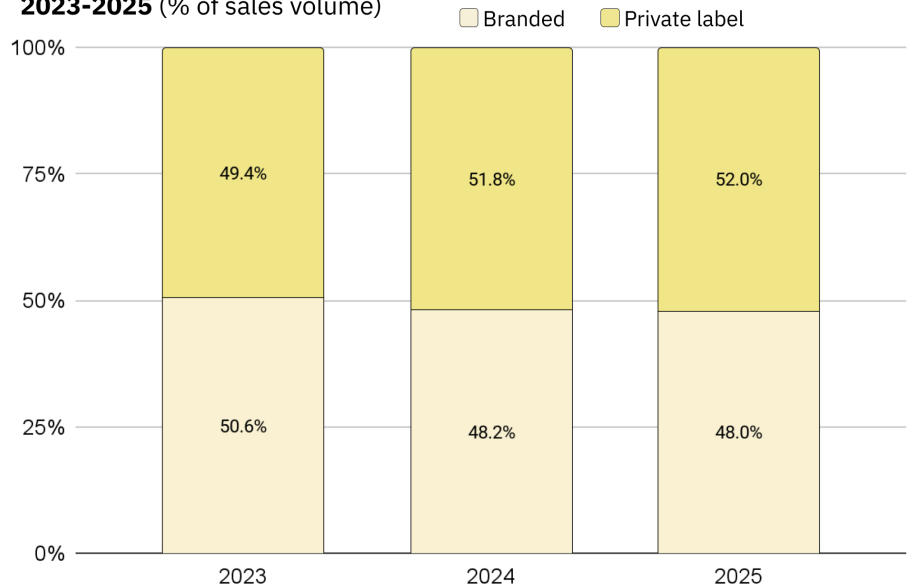
Private-label products continued to account for just over half of sales volume in 2025, with no major shift compared to the previous two years.

Sales volume of both branded and private-label products grew in 2025, with branded up 5.8% and private-label up 6.5%.

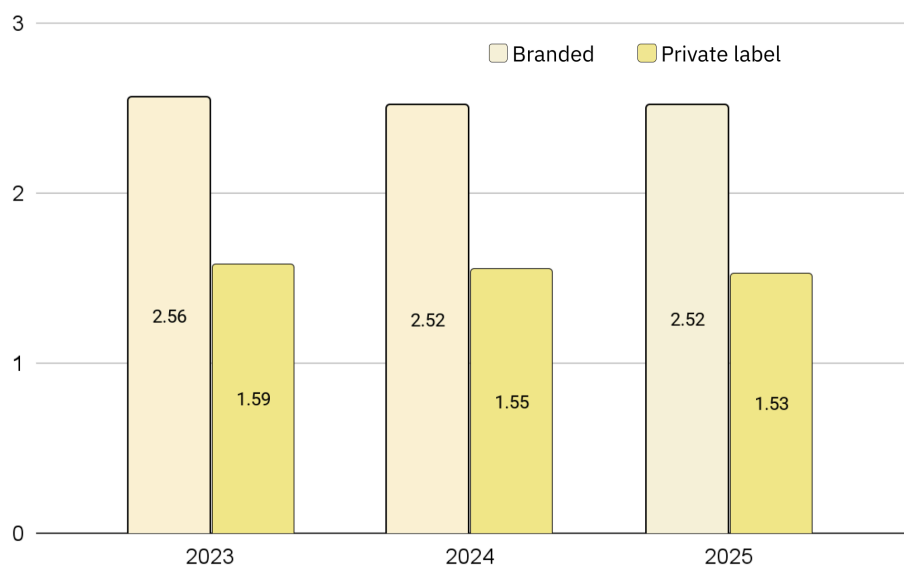
Private-label products were 39% cheaper than branded options in 2025, a gap that has remained roughly steady since 2023.

Private-label products captured a higher proportion of the milk and drinks market than in other plant-based categories, likely indicating that this category meets consumer expectations on taste and performance.

**Italy plant-based milk and drinks sales by branded or private label, 2023-2025 (% of sales volume)**



**Average price per litre of plant-based milk and drinks in Italy, by branded or private label, 2023-2025 (€/l)**



## Product format breakdown

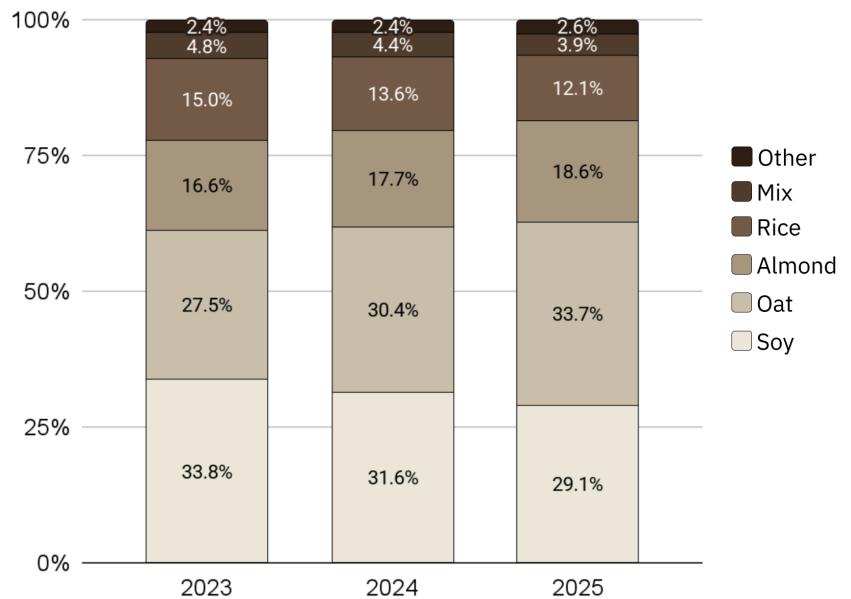
The available data indicate that the vast majority of plant-based milk and drinks sold in Italy were ambient, at 99.9% of sales volume in 2025.

Italy's plant-based milk and drinks market is diverse, with sales spread across several different types.

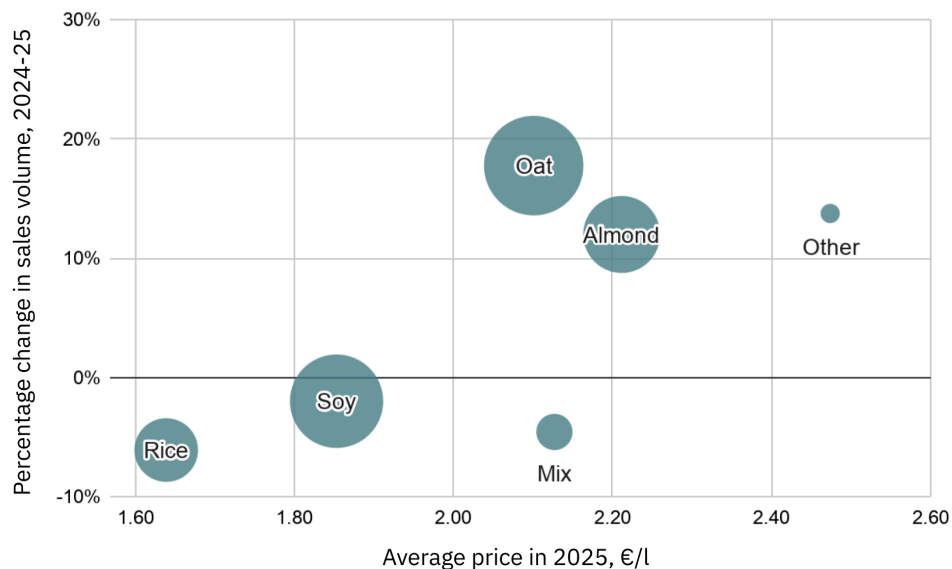
Soy milk and drinks lost market share between 2023 and 2025 (although sales volume only fell by 2.0% from 2024 to 2025). Oat-based options saw their market share grow from 27.5% in 2023 to 33.7% in 2025, with an 18% increase in sales volume in 2025. Almond also saw growth, with market share rising between 2023 and 2025 and sales volume increasing by 12% in 2025.

The segments that grew in 2025 (notably oat and almond) were also generally more expensive than those in decline (rice and soy), suggesting that taste and functionality may be a more important factor than price in this well-established category.

**Italy plant-based milk and drinks sales by base ingredient, 2023-2025**  
(% of sales volume)



**Average price versus sales volume change, plant-based milk by base ingredient\*, Italy**



\*Bubble size represents sales volume in 2025.

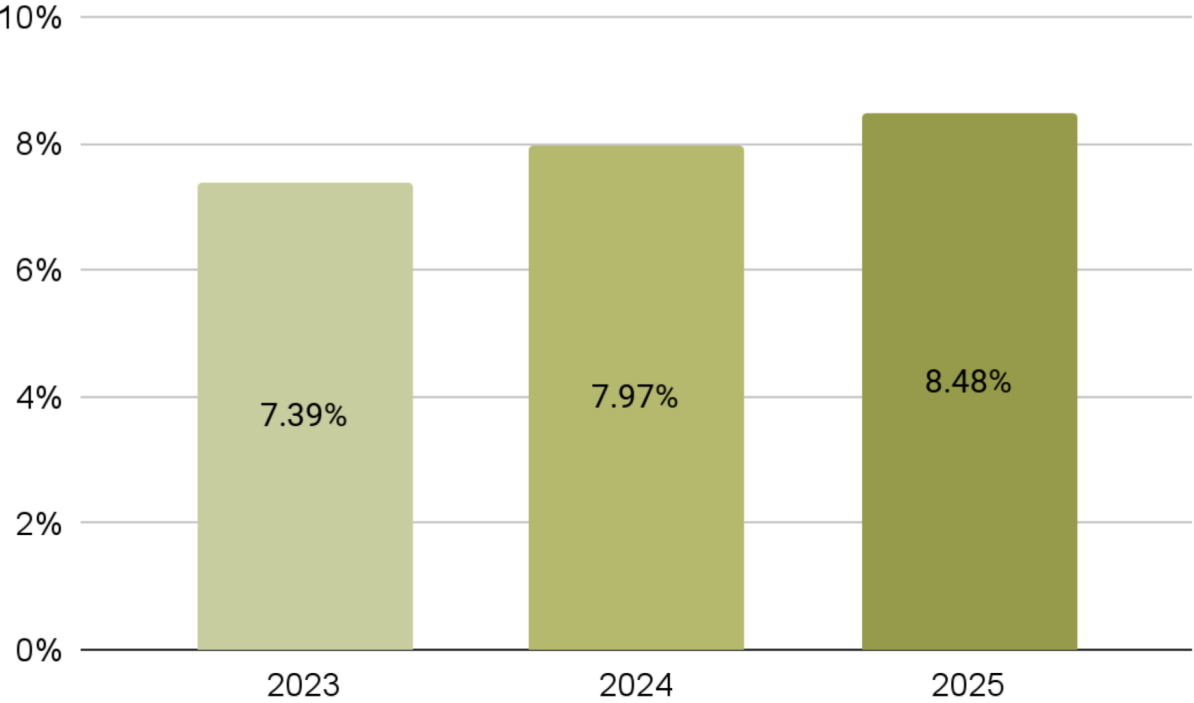
## Market share

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<sup>3</sup>, rose from 7.39% in 2023 to 8.48% in 2025. This shows that plant-based milk and drinks have gained a stronger foothold than smaller, emerging plant-based categories, and are approaching mainstream status in Italy.

These trends are partly driven by the ongoing growth in plant-based milk and drinks sales, up 9.9 million litres in 2025, and partly due to falling sales of animal-based milk, which fell by 12.9 million litres in 2025.

However, it is unlikely that falling sales of dairy milk can be attributed to displacement by plant-based milk and drinks. Between 2023 and 2025, sales of dairy milk fell by 60 million litres – considerably more than the 19 million litre growth in plant-based milk and drinks. This suggests that other factors caused the fall in dairy milk sales.

**Plant-based milk and drinks: share of Italy’s total (plant- and animal-based) milk and drinks market, 2023-2025**  
(% of sales volume)



<sup>3</sup> Both fresh and long-life milk.

## Price trends relative to animal equivalent

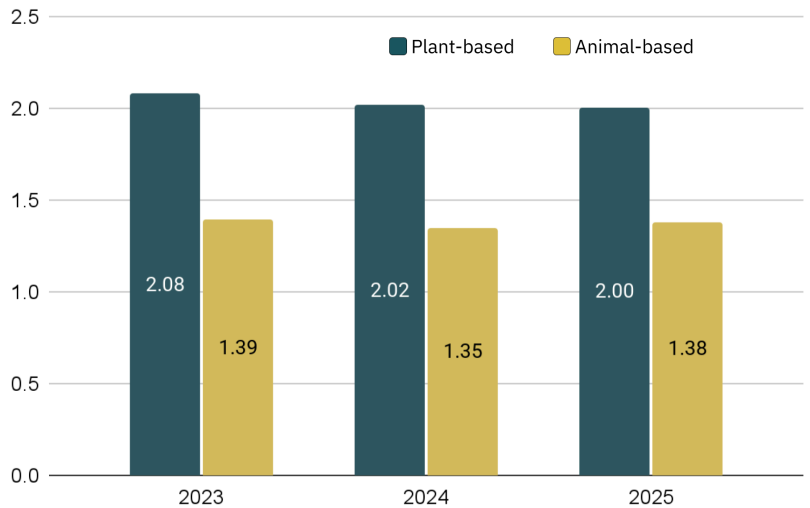
The average price of plant-based milk and drinks fell between 2023 and 2025, in contrast to the ongoing [inflation](#) seen across Italy's wider food sector.

Meanwhile, the price of animal-based milk dipped in 2024 before rising again in 2025. The result is that the price gap between the two narrowed in 2025, with plant-based milk 45% more expensive per litre.<sup>4</sup>

The price gap was more pronounced for branded products, where plant-based options cost an average of 66% more than branded animal-based milk per litre in 2025.

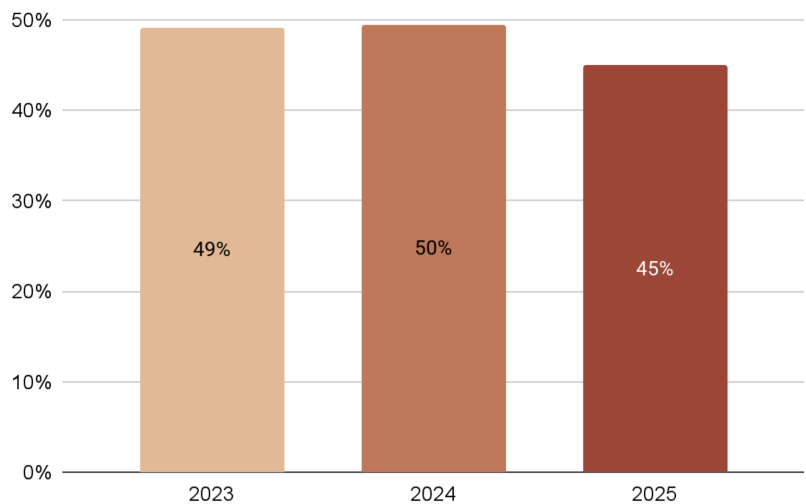
For private-label products, the gap was just 34% in 2025.

**Average price per litre for plant-based and animal-based milk and drinks in Italy, 2023-2025 (€/l)**



**Price difference for plant-based milk and drinks compared to animal-based milk and drinks in Italy, 2023-2025**

(% difference based on €/l)



<sup>4</sup> 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 and fresh animal-based milk).

# Plant-based cheese

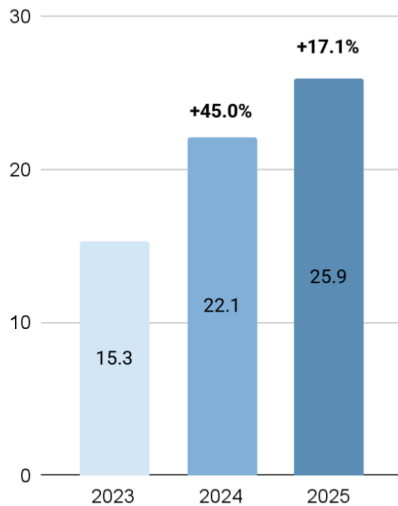
## Total market

Italy's emerging plant-based cheese market continued to see double-digit growth in 2025, although the rate slowed relative to 2024, and the category accounted for a tiny fraction of overall cheese sales.

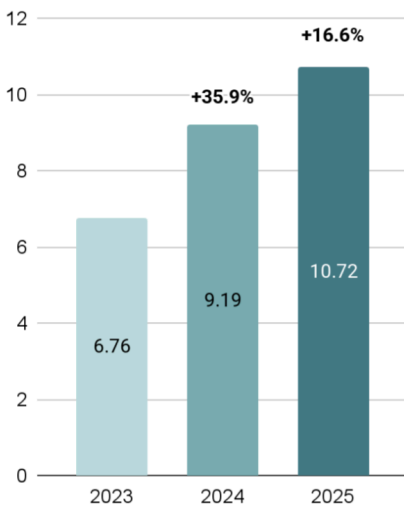
In 2025, sales value was up 17.1% to €25.9 million, 69.7% higher than in 2023. Unit sales rose 16.6% to 10.7 million, up by 58.5% compared to 2023. Sales volume increased 15.6% to 1.59 million kg, 65.9% higher than in 2023.

## Plant-based cheese sales in Italy, 2023-2025

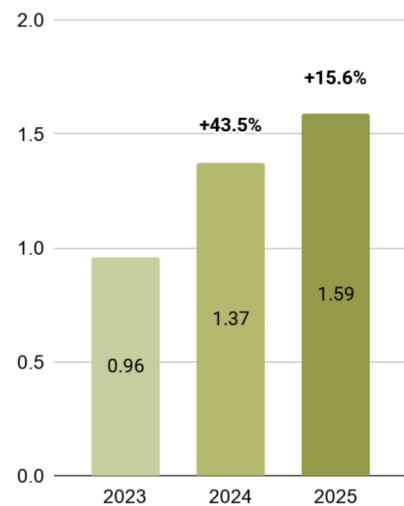
Sales value (€ millions)



Units sold (millions)



Volume sold (millions of kg)



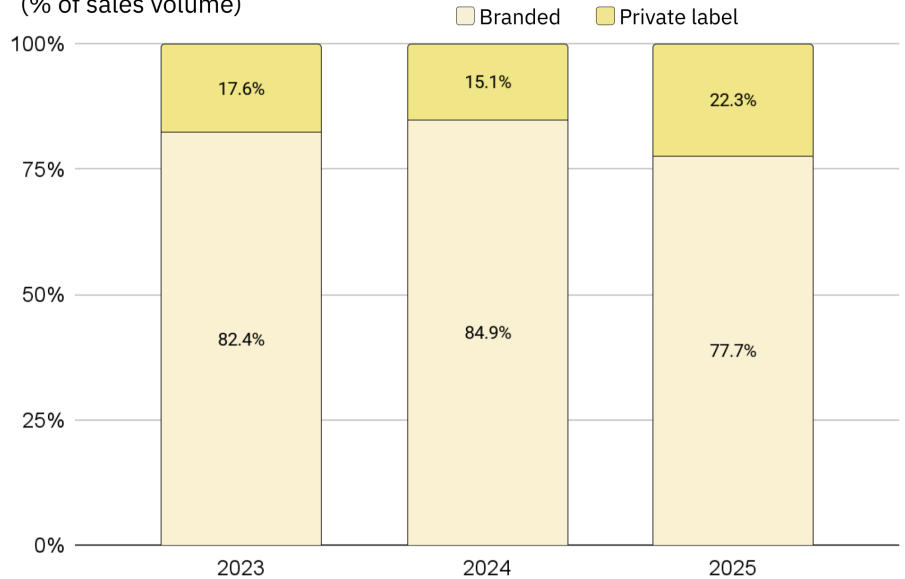
## Branded versus private label

Private-label sales jumped in 2025, accounting for 22.3% of overall sales volume. However, it is worth noting that in a tiny category such as plant-based cheese, small changes such as the launch of a small number of new private-label products could cause volatility in the data.

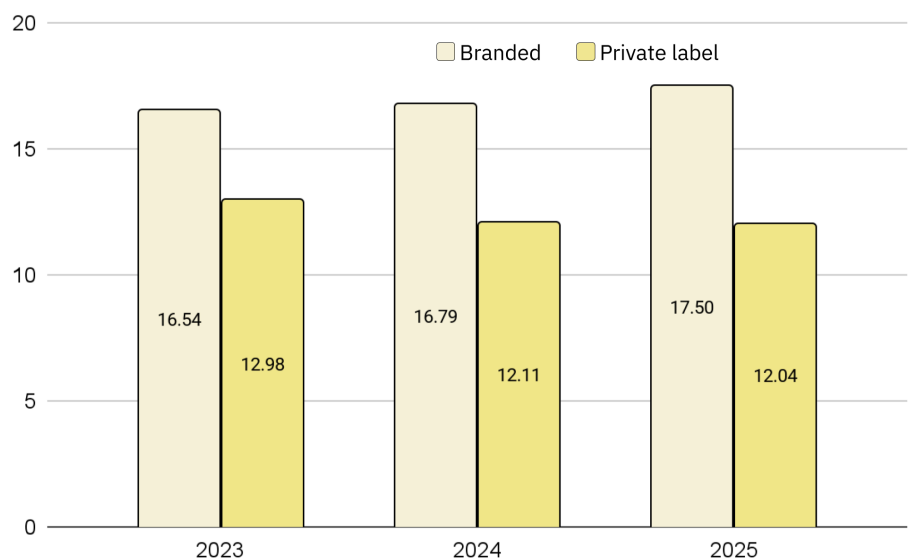
This reflects a 71% increase in the sales volume of private-label plant-based cheese, compared with 6% growth for branded. The growth of private-label products might be due to their lower price point, at 31% cheaper per kg than branded products in 2025.

However, branded plant-based cheese still accounts for over three-quarters of the market, despite being significantly more expensive. This suggests that other factors, such as taste, may be the primary drivers of consumer choice in this early-stage category.

**Italy plant-based cheese sales by branded or private label, 2023-2025**  
(% of sales volume)



**Average price per kg of plant-based cheese in Italy, by branded or private label, 2023-2025** (€/kg)



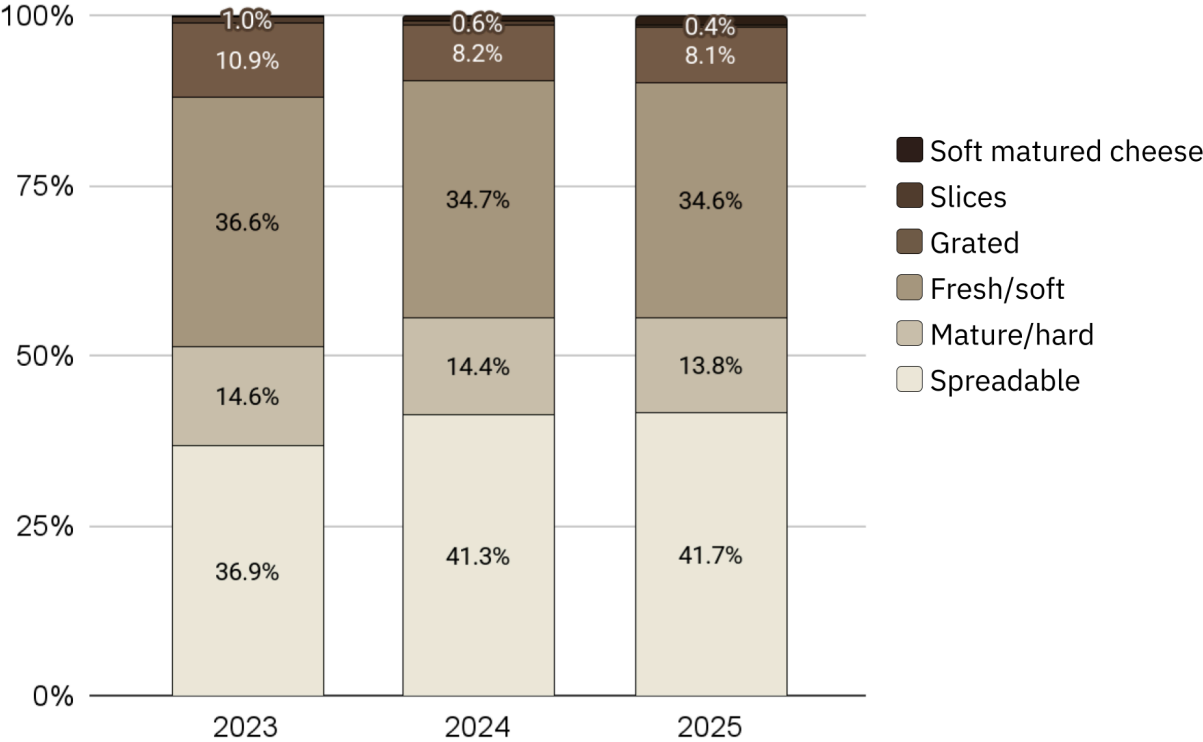
## Product format breakdown

Between 2023 and 2025, the market share of spreadable cheese rose from 36.9% to 41.7% of sales volume.

Fresh/soft cheese (a segment including cheeses in the style of ricotta, mozzarella and mascarpone) was the second-largest segment, at 34.6% in 2025.

There was no major shift in the remaining segments between 2024 and 2025.

**Italy plant-based cheese sales by type, 2023-2025** (% of sales volume)

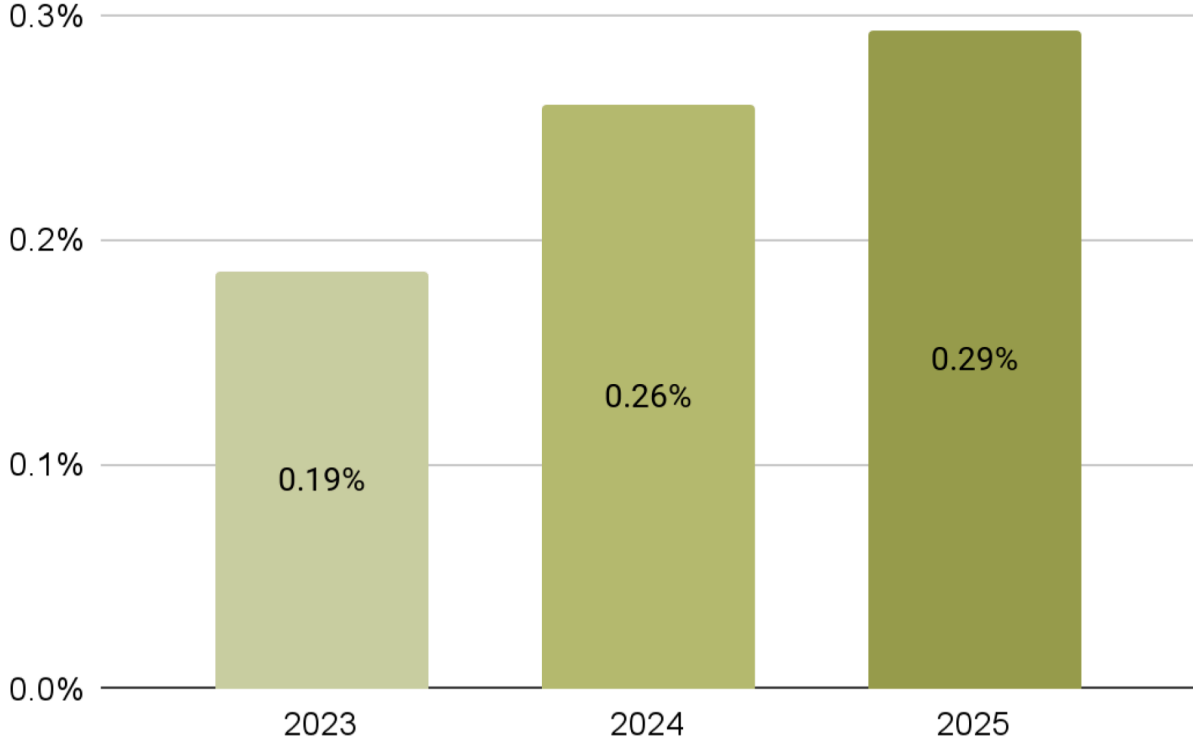


## Market share

Plant-based cheese remains a small, emerging category when compared with overall retail sales of plant- and animal-based cheeses in Italy.

Although its market share rose to 0.29% of sales volume in 2025, animal-based cheese sales rose by 2.6%, which in absolute terms is an increase of 13.6 million kg (compared to a rise of 215,000kg for plant-based cheese).

**Plant-based cheese: share of Italy's total (plant- and animal-based) cheese market, 2023-2025** (% of sales volume)



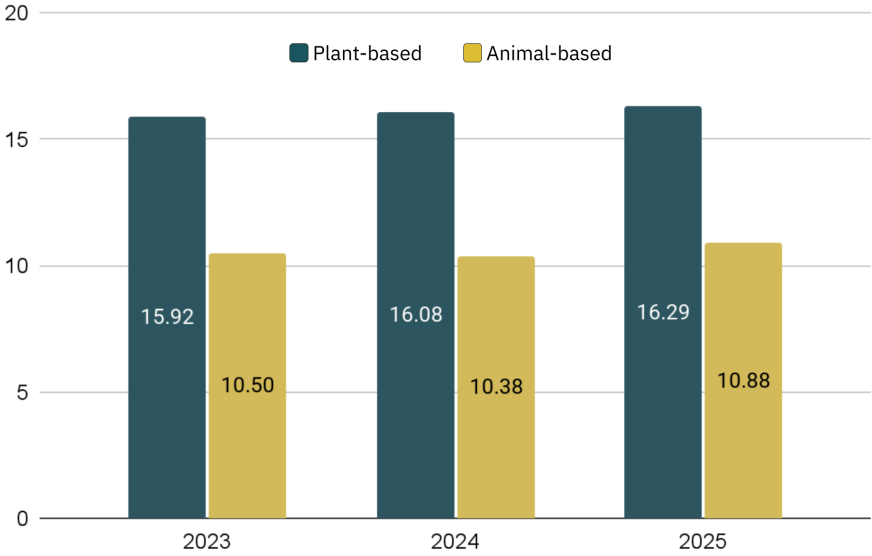
## Price trends relative to animal equivalent

The price of both plant- and animal-based cheese rose slightly in 2025, resulting in the price gap narrowing from 55% in 2024 to 50% in 2025.

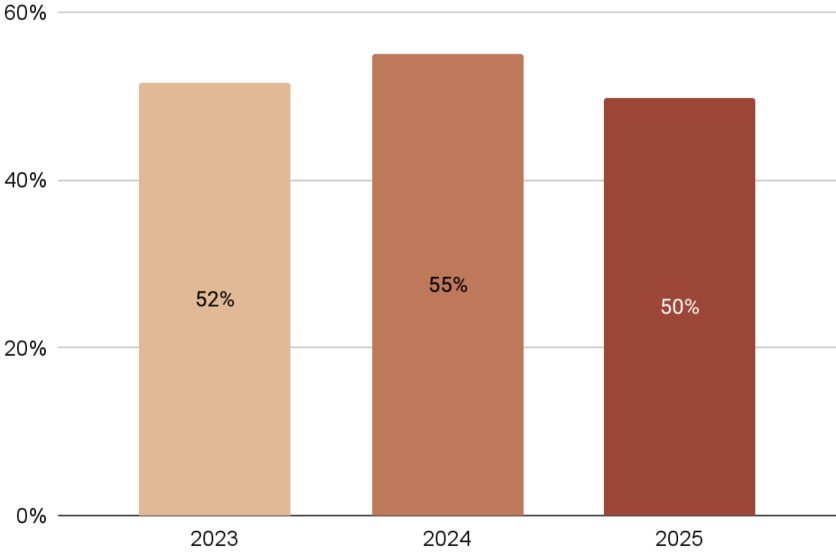
Plant-based cheese therefore remained a premium option compared to animal-based cheese.

The gap was smaller in the private-label segment, where plant-based options were just 22% more expensive per kg in 2025. The same gap in the branded segment was 49% in 2025.

**Average price per kg for plant-based and animal-based cheese in Italy, 2023-2025 (€/kg)**



**Price difference for plant-based cheese compared to animal-based cheese in Italy, 2023-2025 (% difference based on €/kg)**



# Plant-based yoghurt

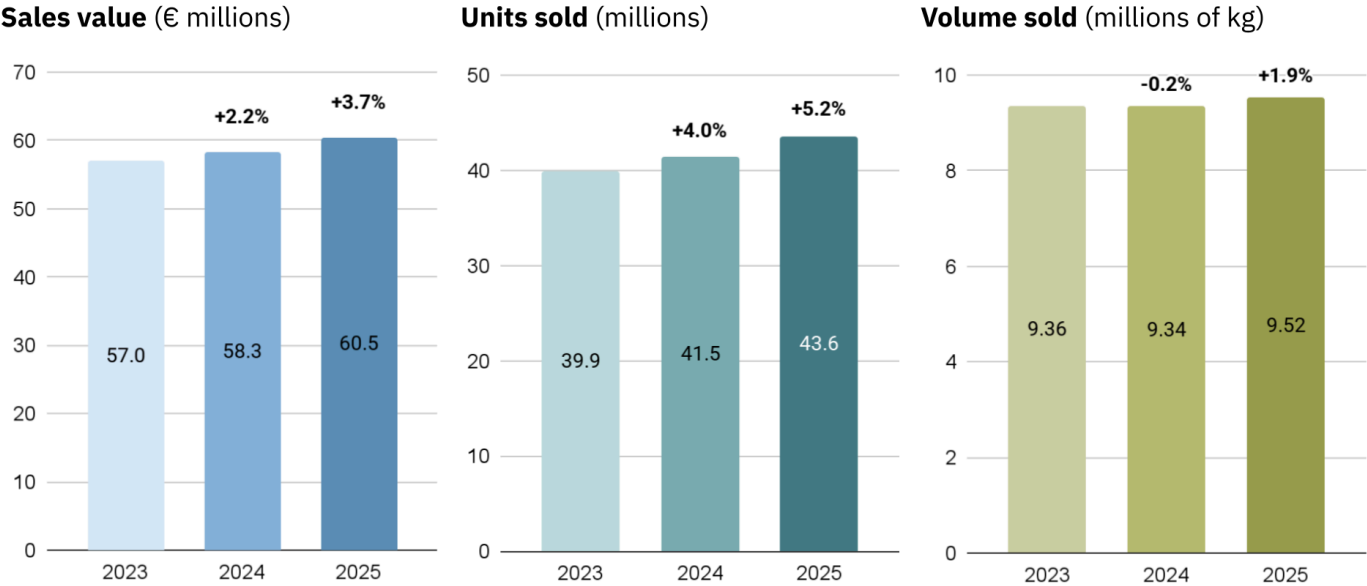
## Total market

Italy’s plant-based yoghurt market grew slightly in 2025 amid wider growth in yoghurt consumption.

Sales value was up 3.7% to €60.5 million in 2025 (representing higher growth than in 2024), unit sales were up 5.2% to 43.6 million, and sales volume remained roughly steady, with a 1.9% increase to 9.52 million kg.

The gap between sales value and sales volume growth can be attributed to the rising cost per kg of plant-based yoghurt, in line with ongoing [inflation](#) across Italy’s wider food sector.

## Plant-based yoghurt sales in Italy, 2023-2025



# Branded versus private label

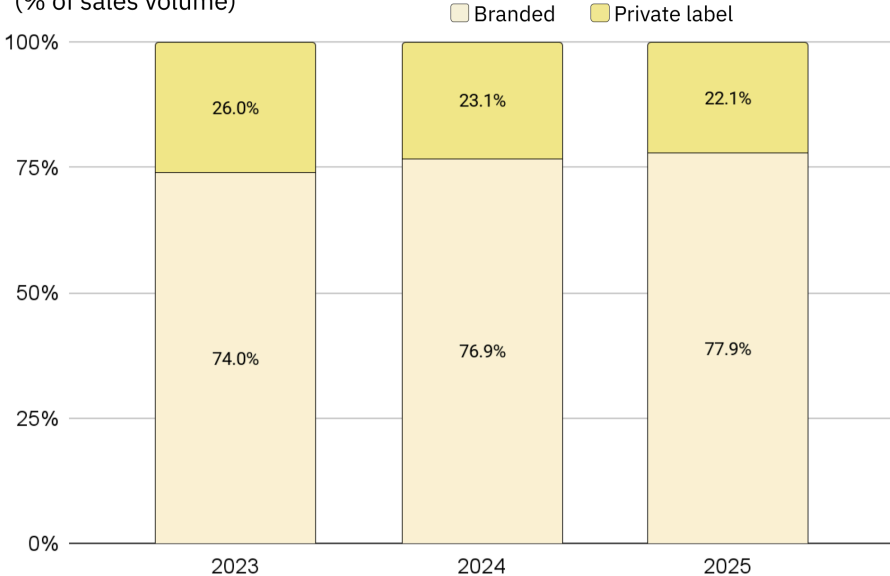
Branded products were notably more expensive per kg than private-label products, with an 81% price gap in 2025.

Nevertheless, 77.9% of plant-based yoghurt sales volume was branded in 2025, up slightly from 74.0% in 2023.

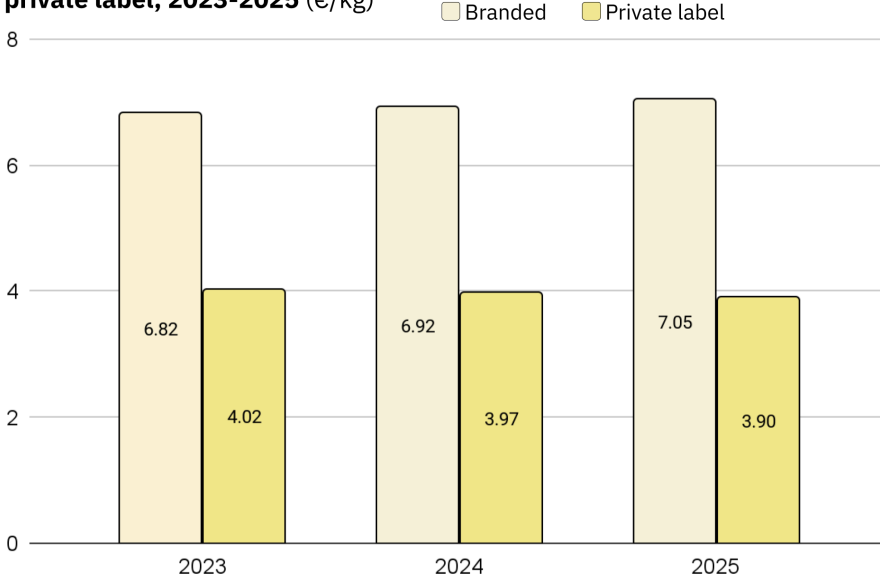
This represents an increase of 235,000 kg in absolute branded sales volume in 2025, compared with a 56,000 kg decrease in private-label sales.

The continued market dominance of branded plant-based yoghurt suggests that factors other than price, such as taste and texture, are also influencing consumers' choices.

**Italy plant-based yoghurt sales by branded or private label, 2023-2025**  
(% of sales volume)



**Average price per kg of plant-based yoghurt in Italy, by branded or private label, 2023-2025 (€/kg)**



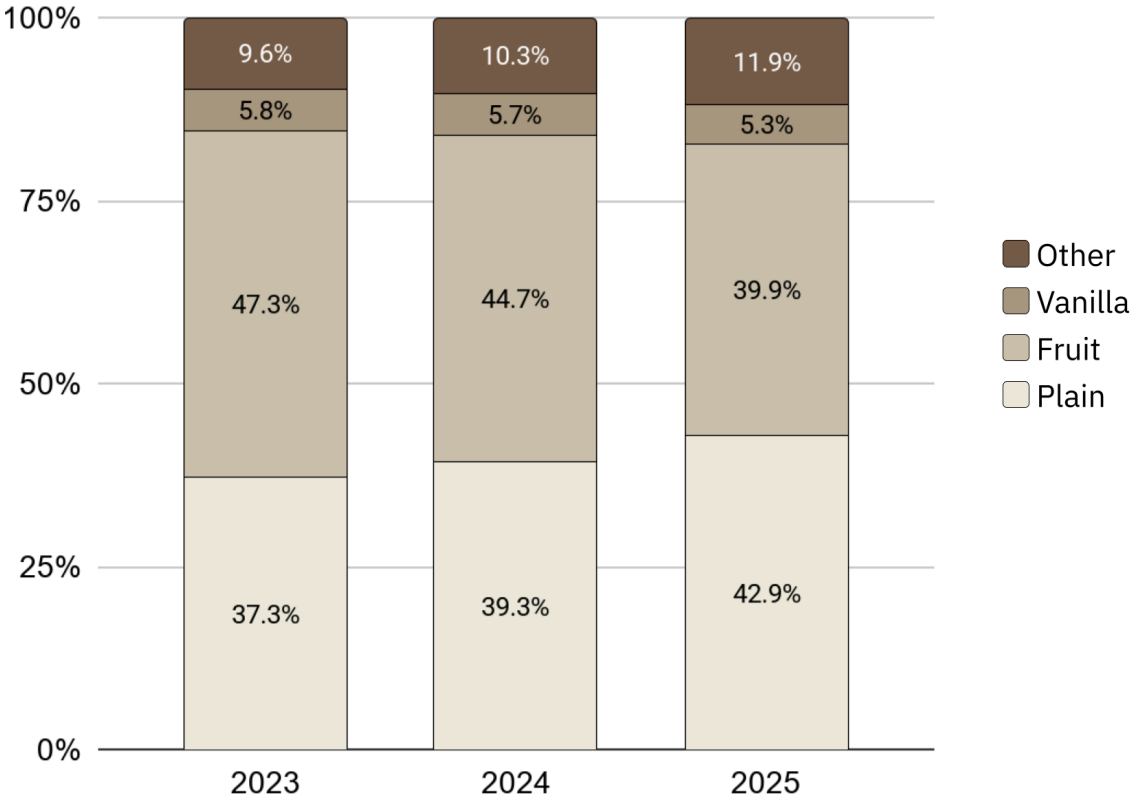
### Product format breakdown

Fruit-flavoured options represented 39.9% of plant-based yoghurt sales volume in 2025 – a decline from 47.3% in 2023, despite being the cheapest type, at an average of €5.95/kg in 2025.

Meanwhile, plain (unflavoured) yoghurt made up 42.9% in 2025 – an increase from 37.3% in 2023.

There was also a rise in other (non-fruit) flavours from 9.6% in 2023 to 11.9% in 2025. This is a premium segment, costing an average of €8.57/kg in 2025, and contains a variety of flavours such as coffee, pistachio and caramel. Consumers may consider this an indulgent category rather than a staple, and therefore be willing to spend more on it.

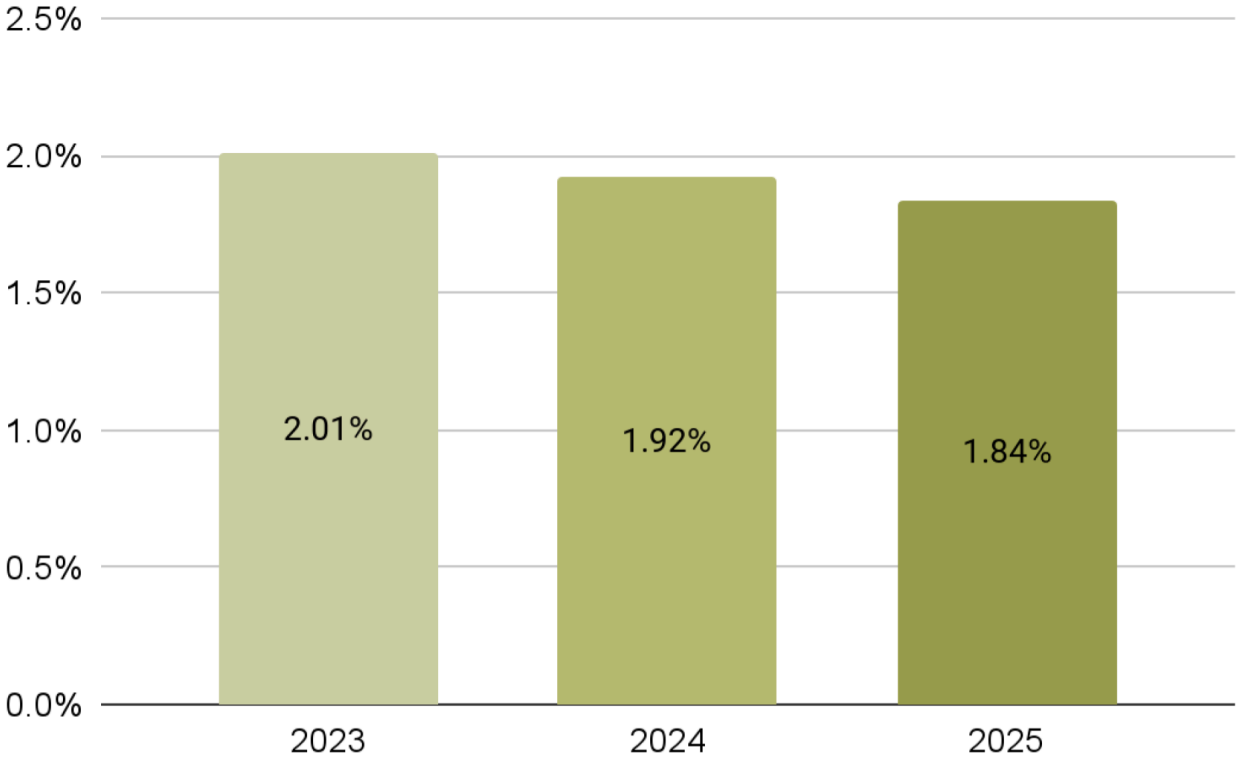
**Italy plant-based yoghurt sales by flavour, 2023-2025** (% of sales volume)



## Market share

Despite steady plant-based yoghurt sales volume, its market share (as a percentage of overall plant- and animal-based yoghurt sales volume) fell from 2.01% in 2023 to 1.84% in 2025. This is due to a continued increase in dairy yoghurt sales volume, which rose by 11% between 2023 and 2025.

### Plant-based yoghurt: share of Italy's total (plant- and animal-based) yoghurt market, 2023-2025 (% of sales volume)



## Price trends relative to animal equivalent

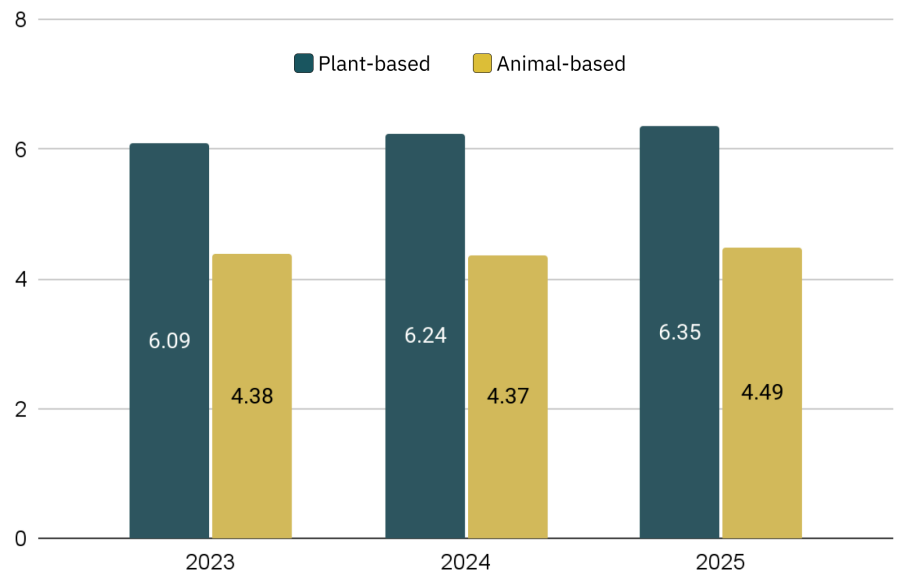
Plant-based and animal-based yoghurt both increased slightly in price per kg between 2023 and 2025. Plant-based yoghurt was 42% more expensive per kg in 2025, compared to animal-based yoghurt.

The gap was particularly marked in branded products, where the plant-based version was 40% more expensive per kg in 2025.

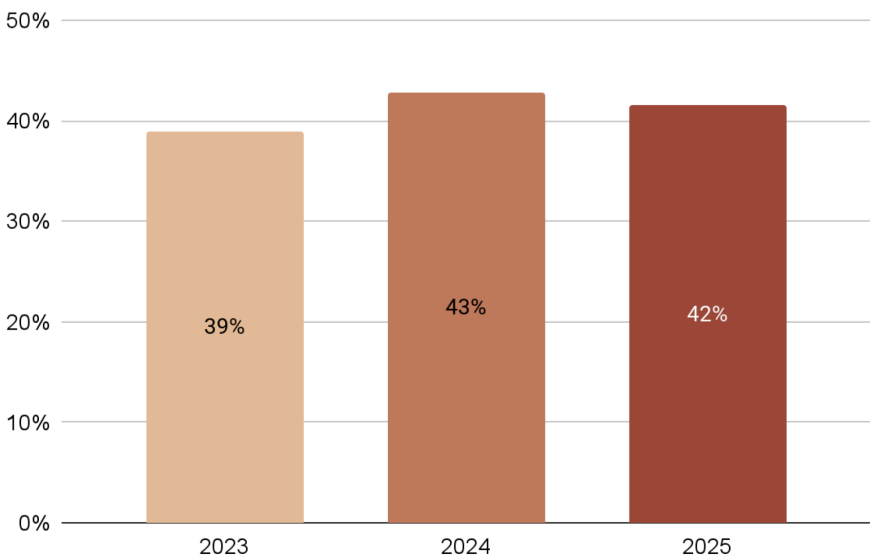
When comparing only private-label products, plant-based yoghurt was just 8% more expensive than dairy yoghurt in 2025.

However, private-label plant-based yoghurt fell 2.6% in sales volume in 2025, compared with 9.0% growth for private-label animal-based yoghurt, suggesting that even the relatively small price gap for private-label yoghurt remains a barrier.

**Average price per kg for plant-based and animal-based yoghurt in Italy, 2023-2025 (€/kg)**



**Price difference for plant-based yoghurt compared to animal-based yoghurt, 2023-2025 (% difference based on €/kg)**



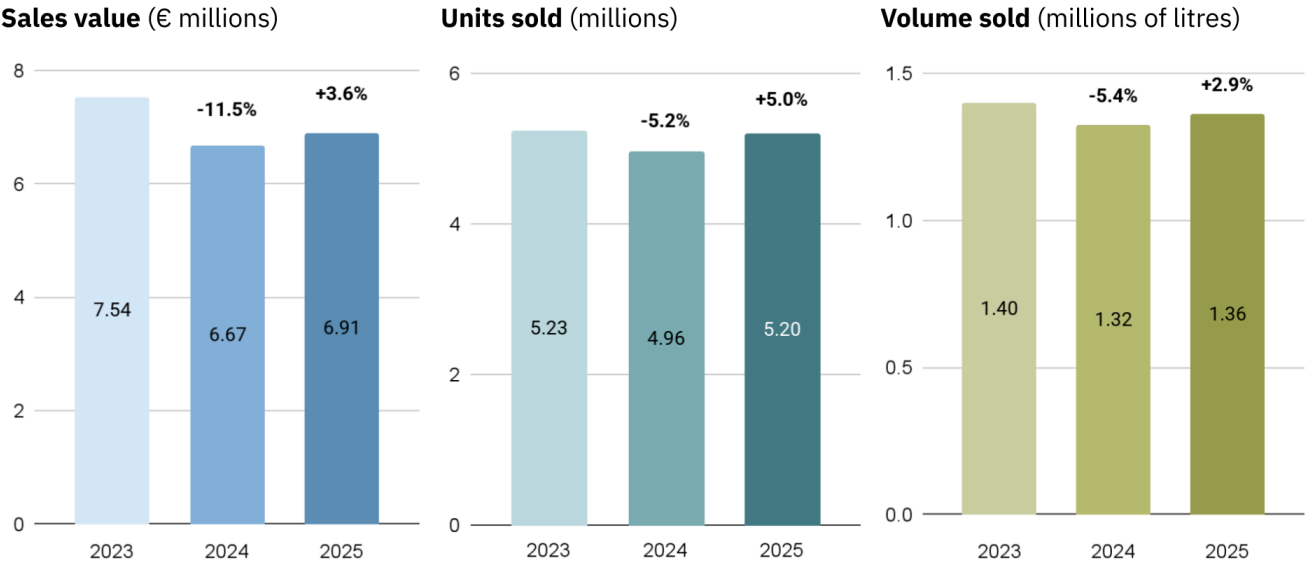
# Plant-based cream

## Total market

Sales of plant-based cream in Italy rebounded in 2025, possibly driven by increased affordability relative to animal-based cream.

Following falling sales in 2024, sales value rose by 3.6% to €6.91 million, unit sales rose by 5.0% to 5.2 million, and sales volume rose by 2.9% to 1.36 million litres. Despite this recovery, sales did not reach the levels seen in 2023.

## Plant-based cream sales in Italy, 2023-2025

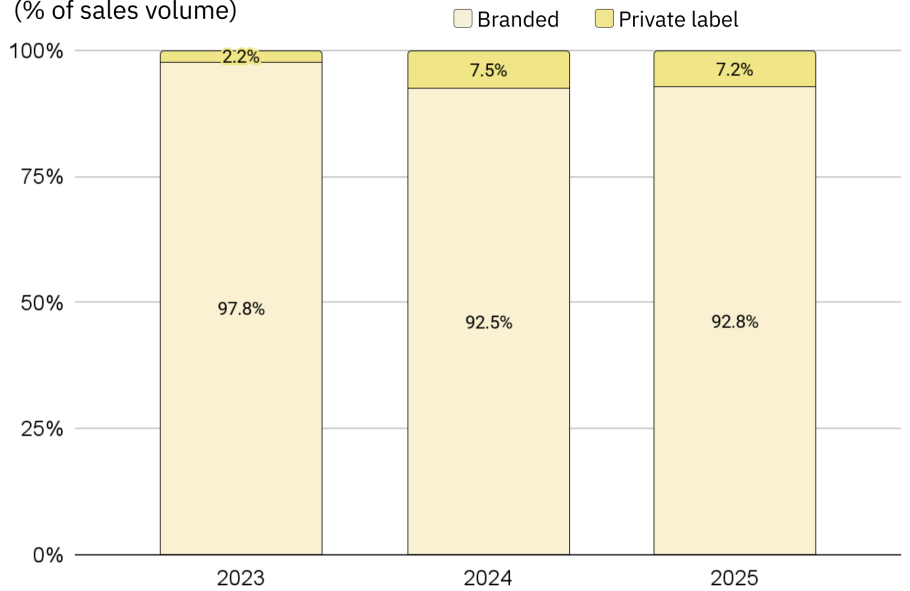


## Branded versus private label

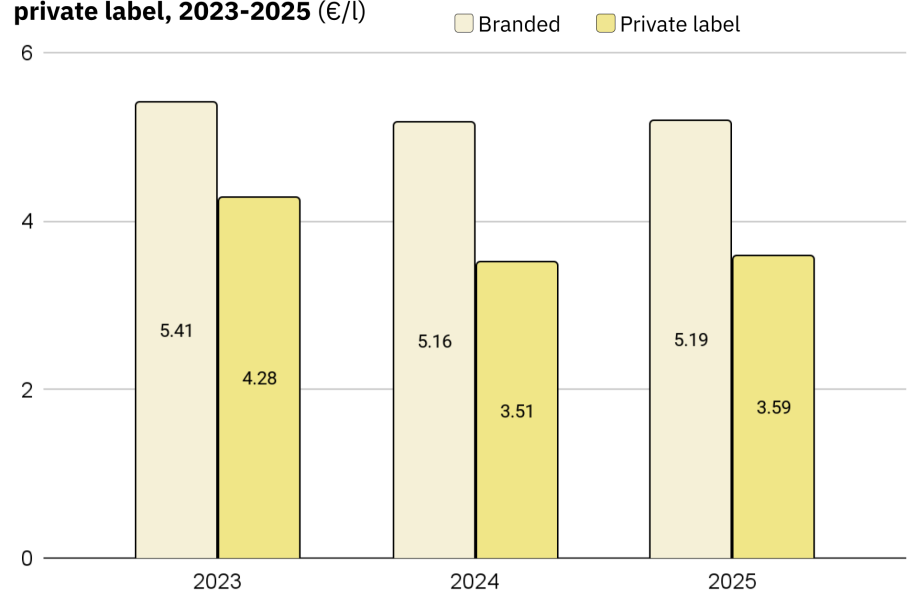
The market mostly consisted of branded products, with private-label products accounting for just 7.2% of sales volume in 2025 (up from 2.2% in 2023).

Private-label plant-based cream was 31% cheaper per litre than branded products in 2025, with the average price per litre having fallen for both since 2023.

**Italy plant-based cream sales by branded or private label, 2023-2025**  
(% of sales volume)



**Average price per litre of plant-based cream in Italy, by branded or private label, 2023-2025 (€/l)**



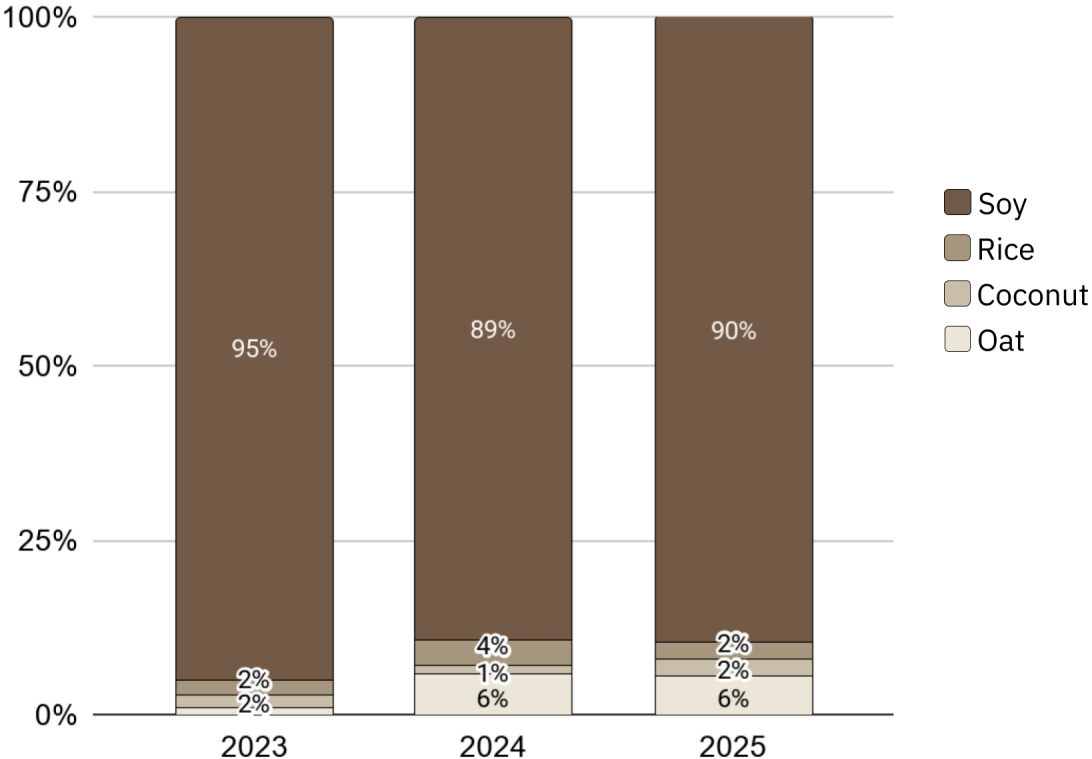
### Product format breakdown

Soy cream was the dominant type of plant-based cream in Italy in 2025, at 90% of sales volume.

Although there was some growth in other ingredient bases in 2024, including rice and oat, there was no significant shift in 2025.

The growth of oat cream between 2023 and 2025 might have been linked to its relative affordability: at an average of €3.38/litre in 2025, it was the cheapest type. Soy cream, by comparison, cost an average of €5.16/litre.

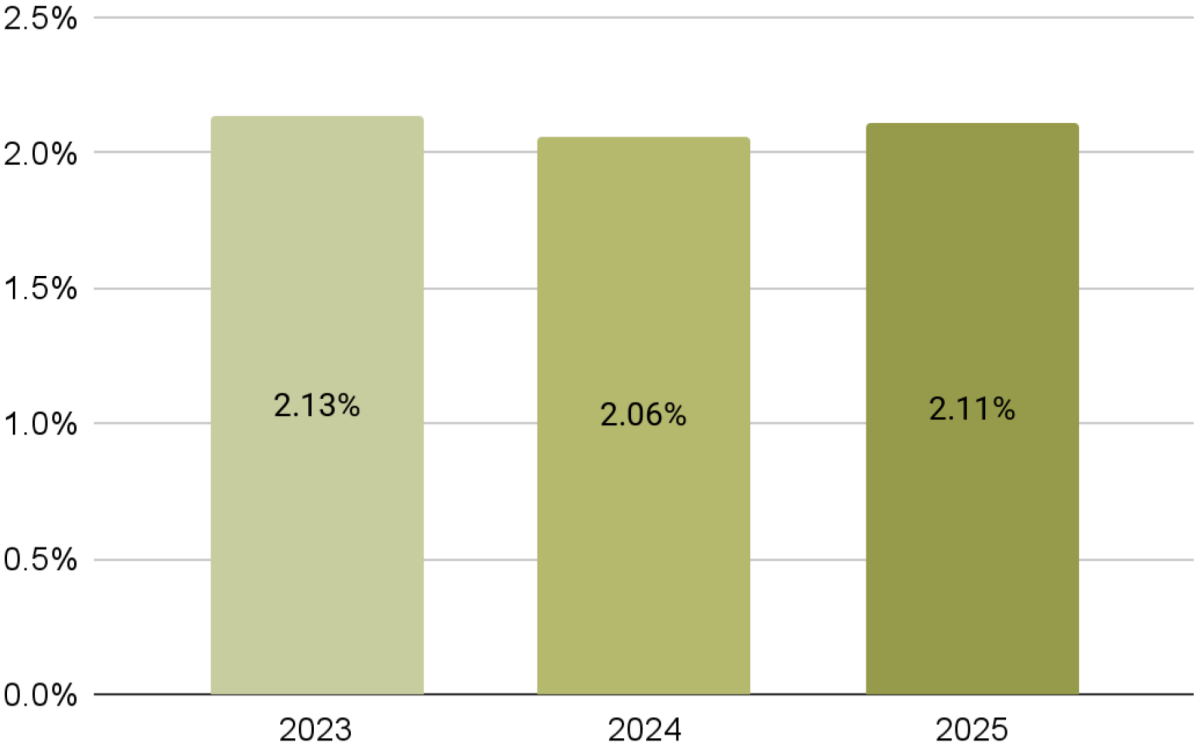
**Italy plant-based cream sales by ingredient base, 2023-2025**  
(% of sales volume)



## Market share

The market share of plant-based cream, as a proportion of both plant- and animal-based cream sales volume in Italy, rose slightly in 2025 as dairy cream sales remained steady. However, plant-based cream has not yet captured a large proportion of Italy’s cream market, and it did not regain the market share it had in 2023.

### Plant-based cream: share of Italy’s total (plant- and animal-based) cream market, 2023-2025 (% of sales volume)



## Price trends relative to animal equivalent

Plant-based cream is the only category in this report that is cheaper than its animal-based counterpart.

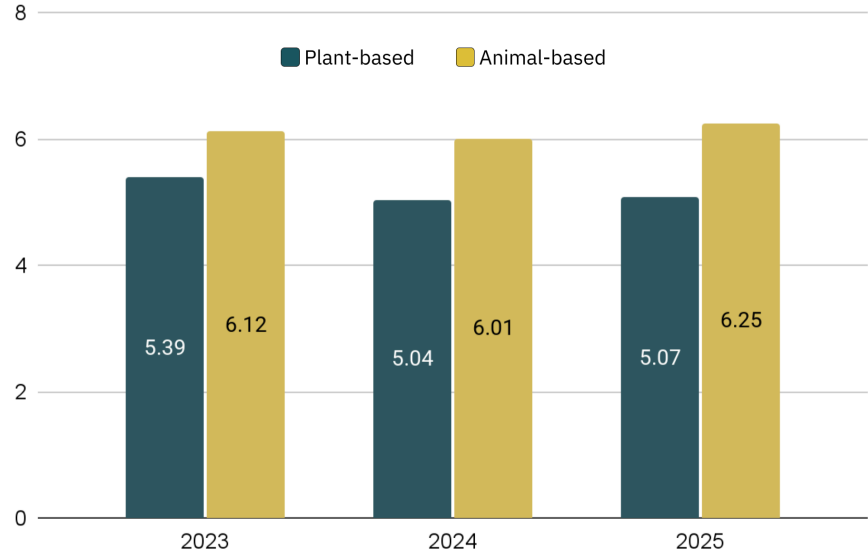
At an average of €5.07/litre in 2025, plant-based cream was 19% cheaper than animal-based cream. This gap has increased from 12% in 2023, driven partly by falling plant-based prices in 2024 and partly by rising dairy cream prices in 2025.

Plant-based cream is cheaper than animal-based cream in both the branded and private-label segments.

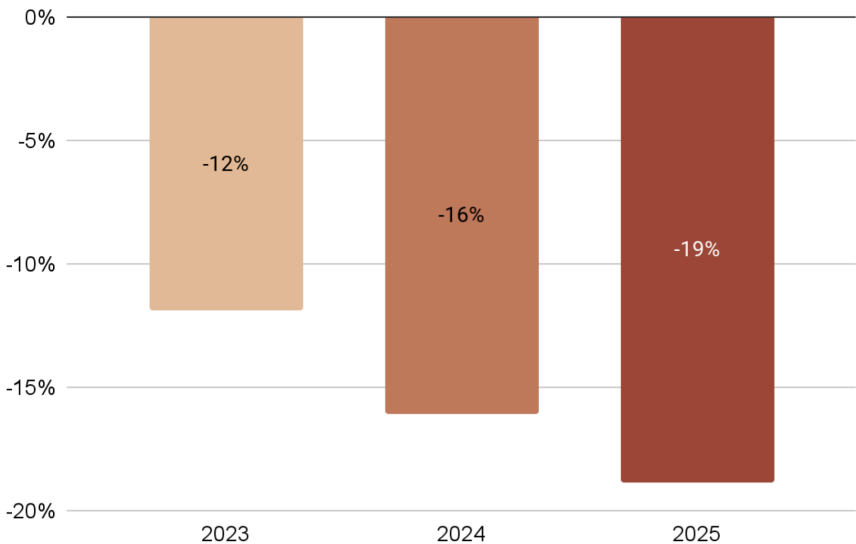
For branded products, plant-based cream was 23% cheaper per litre in 2023, reaching 29% cheaper in 2025.

Private-label products were 15% cheaper in 2023, but 30% cheaper by 2025. This improved affordability might explain the jump in private-label plant-based sales in 2024.

**Average price per litre for plant-based and animal-based cream in Italy, 2023-2025 (€/l)**



**Price difference for plant-based cream compared to animal-based cream in Italy, 2023-2025 (% difference based on €/l)**



## Closing remarks

Italy's plant-based sector continued to grow steadily in 2025, with increased sales across all categories covered by this report.

There was continued growth in both the branded and private-label sectors, although slowing growth rates for private-label products and acceleration in branded sales volume might indicate that price is becoming less critical for consumers, in the context of falling food inflation.

Plant-based meat and cheese saw slower growth in sales volume between 2024 and 2025. This suggests that these products may be struggling to reach wider audiences, after initial enthusiastic uptake among early adopters. To move closer to mainstream status, plant-based brands need to understand the varied needs of a range of different consumer segments – from those highly motivated by factors such as animal welfare and sustainability, to those who might be more motivated by health, to mainstream consumers whose top concerns are taste, quality and price.

Plant-based milk and drinks offered a clear success story in the Italian market, reaching 8.5% of total milk sales volume (and growing) despite remaining significantly more expensive than animal-based milk. Growth in the relatively expensive oat and almond segments suggests that consumers are choosing products that they enjoy the flavour of.

***Helen Breewood,***

*Senior Market and Consumer Insights Manager at the Good Food Institute Europe*



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An increasing number of Italians are turning to plant-based foods, either by exploring them or including them more regularly in their diets. This trend is largely [driven](#) by health motivations, as well as sustainability and animal welfare concerns. In response, the industry has expanded and innovated, bringing to market a wider variety of products that strive to better meet consumer expectations on taste and nutrition. Despite this progress, price remains a major obstacle for many.



Transitioning towards a more balanced mix of protein sources can contribute to improved public health – particularly by reducing reliance on processed meats – while also helping to mitigate the environmental impact of food systems. At the same time, it presents an opportunity to strengthen national food sovereignty and stimulate economic growth and job creation.

To fully realise these benefits, a more coordinated and strategic approach is needed. Strengthening connections between Italian farmers and plant-based companies is key to building resilient, high-quality domestic value chains. With forward-looking public policies, Italy could become a true leader in this field while delivering tangible benefits for people, the environment, and the economy.

***Ilaria Bertini,***

*Senior PR Manager at the Good Food Institute Europe  
Turin, Italy*

## About the Good Food Institute Europe

[The Good Food Institute Europe](#) is a nonprofit 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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