

Europe 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.	The value of plant-based food sales and unit sales grew by 21% between 2020 and 2022.

To contextualise the sales performance of plant-based categories in 2022, it is important to note the unique macroeconomic environment that was present due to the ongoing war in Ukraine, global trade tensions, and inflation. While the growth of the plant-based food retail market decelerated in 2022 compared to 2021, both euro and unit sales continued to grow, demonstrating strong demand from consumers for these products despite these challenges.

Overview of Europe-wide plant-based category sales summary, 2022

	2022 sales value	2021-2022 sales growth	2020-2022 sales growth	2022 unit sales	2021-2022 unit sales growth	2020-2022 unit sales growth
Milk	€2.2 B	7%	19%	1.3 B	6%	20%
Meat	€2.0 B	3%	19%	846 M	1%	21%
Yoghurt	€515 M	-0.4%	8%	255 M	-3%	10%
Spreads	€247 M	13%	40%	140 M	4%	26%
Meals	€181 M	20%	79%	72 M	14%	71%
Ice cream	€174 M	8%	14%	57 M	8%	15%
Cheese	€165 M	4%	56%	61 M	4%	62%
Cream	€139 M	7%	7%	109 M	0%	1%
Dessert	€88 M	6%	27%	58 M	5%	40%
Seafood	€43 M	60%	326%	14 M	67%	343%
Total	€5.8 B	6%	21%	2.9 B	4%	21%

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

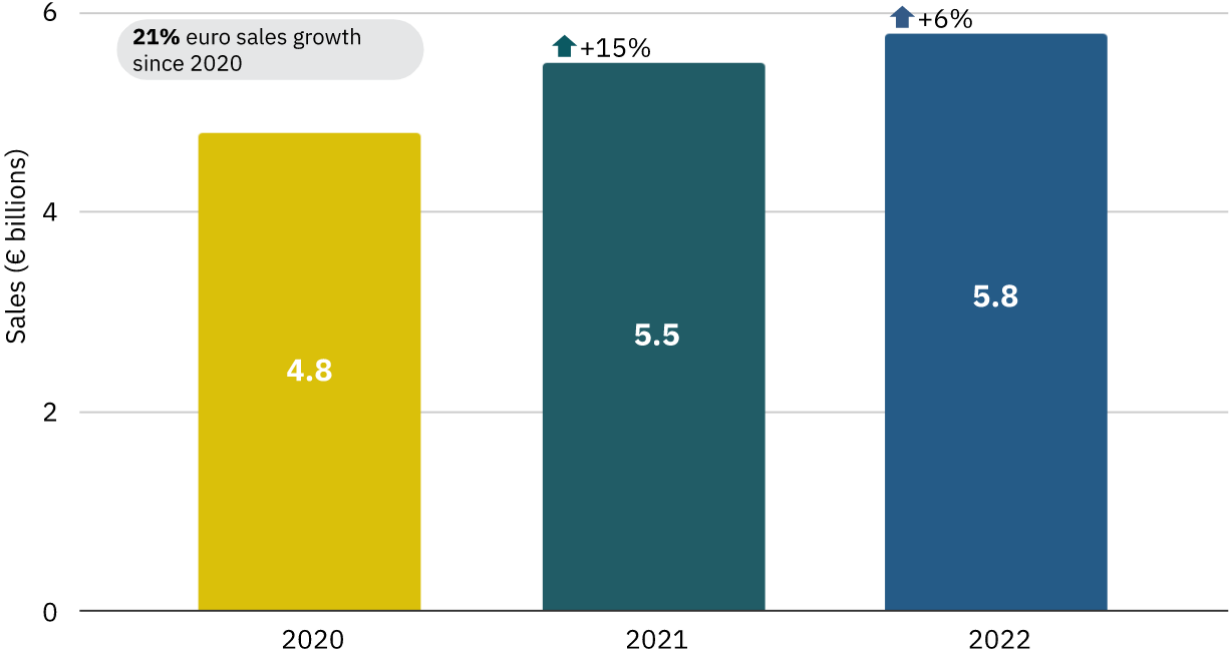
Table of contents

Overall plant-based food market	5
Categories	6
Country comparison	7
Comparison to animal-based foods	8
Plant-based meat	9
Plant-based seafood	11
Plant-based meals	12
Plant-based milk	13
Plant-based cheese	15
Plant-based yoghurt	17
Plant-based spreads	19
Plant-based cream	20
Plant-based ice cream	21
Plant-based dessert	22
Closing remarks	23
About the data	24

Overall plant-based food market

Plant-based food sales in Europe¹ grew by 6% in 2022 to reach €5.8 billion.

Europe-wide plant-based food sales (in € billions)

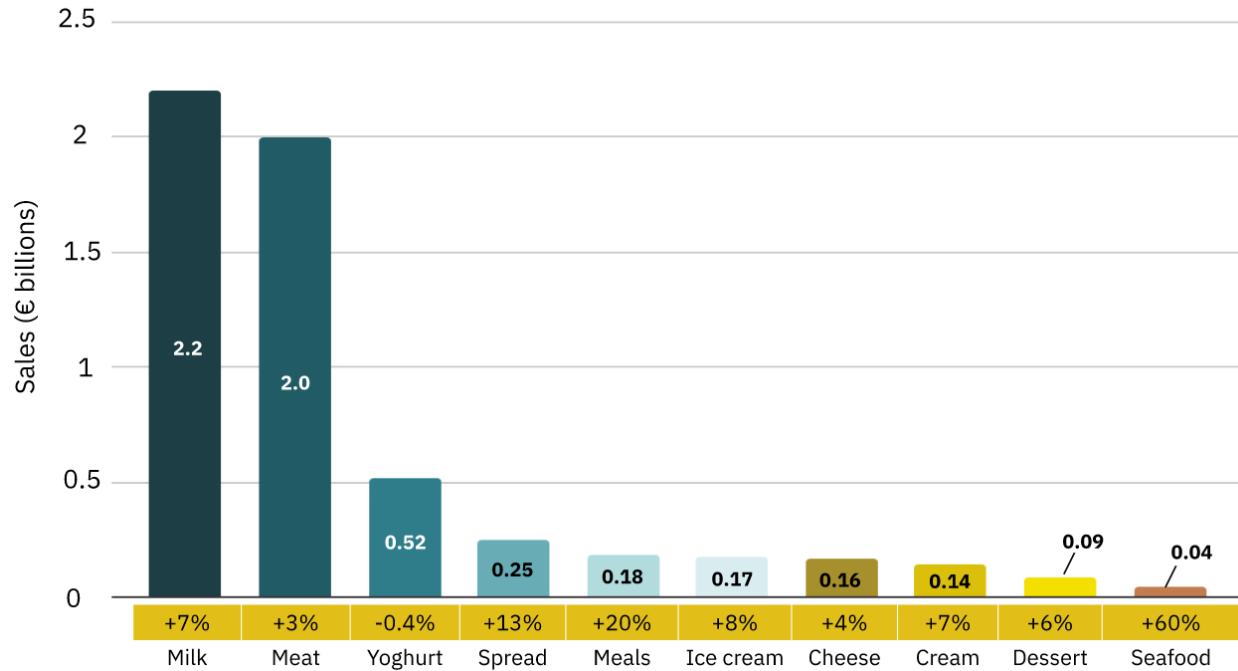


¹ Countries included in analysis: Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, UK

Categories

Plant-based categories are in various stages of development.

Europe-wide plant-based foods sales by category (in € billions), 2022



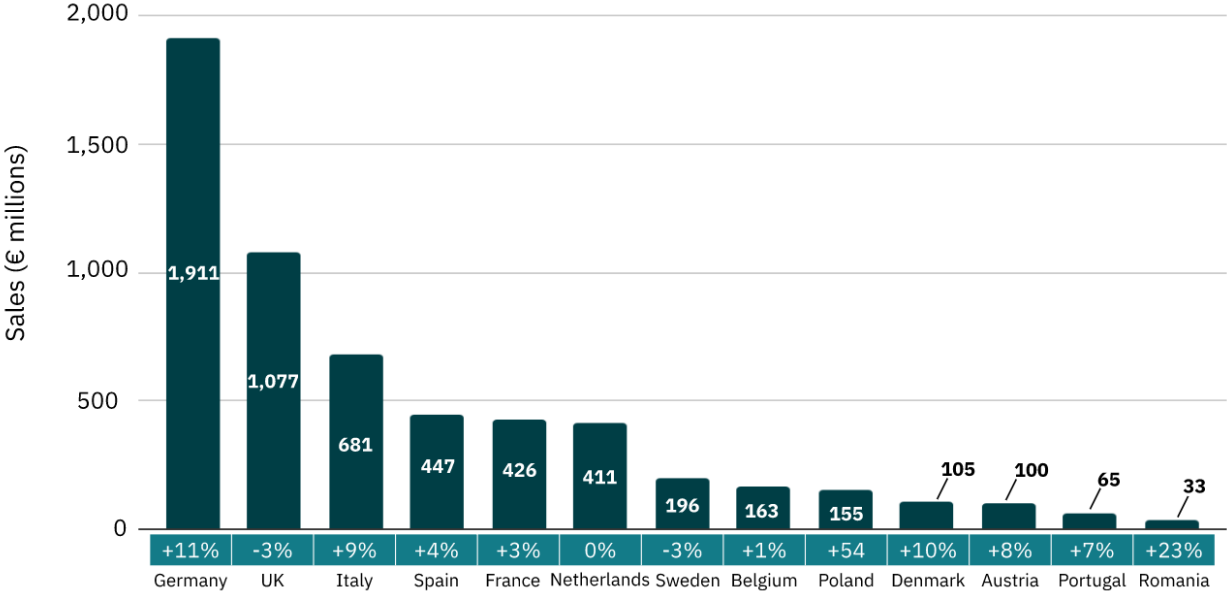
Key insights:

- **Plant-based milk is the most developed of all plant-based categories.** Plant-based milk sales were €2.2 billion in 2022, and the category continues to experience steady growth.
- **Plant-based meat sales continue to increase, totalling €2.0 billion in 2022,** and growing by 19% between 2020 and 2022.
- **Almost every category grew in 2022.** The fastest-growing categories were plant-based seafood, meals, and spreads – all demonstrating double-digit growth in sales value in 2022.
- **The least developed category, but the fastest growing, is plant-based seafood.** At €43 million in sales in 2022, plant-based seafood is still a small category but growing rapidly, with more than 326% growth since 2020.

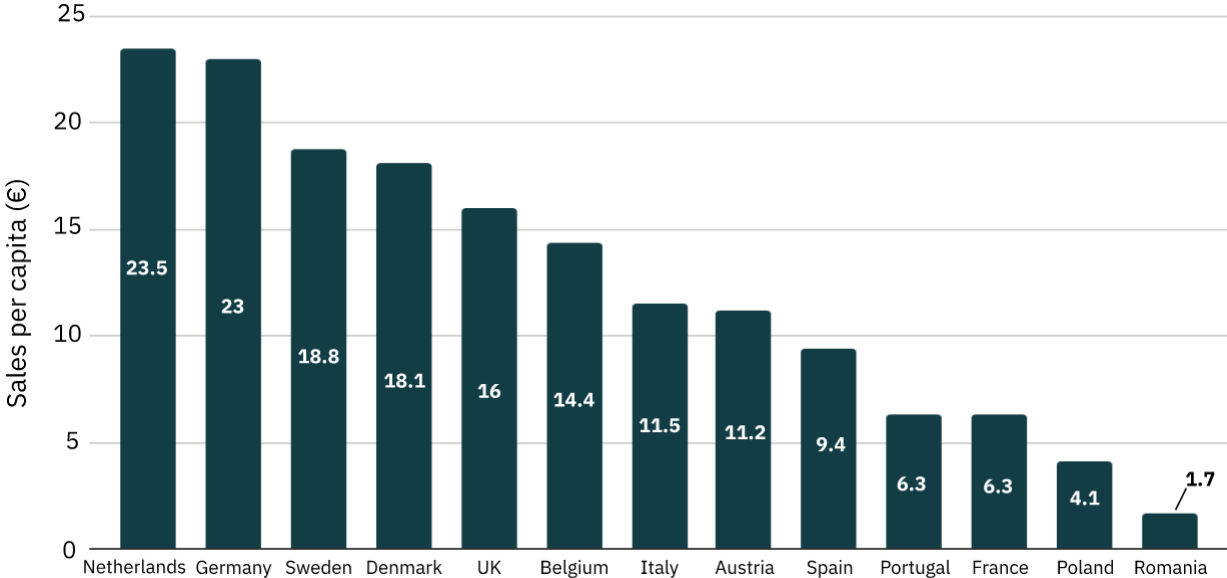
Country comparison

Germany has the highest plant-based food sales value in Europe, but the Netherlands has the highest average plant-based food spend per capita.

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

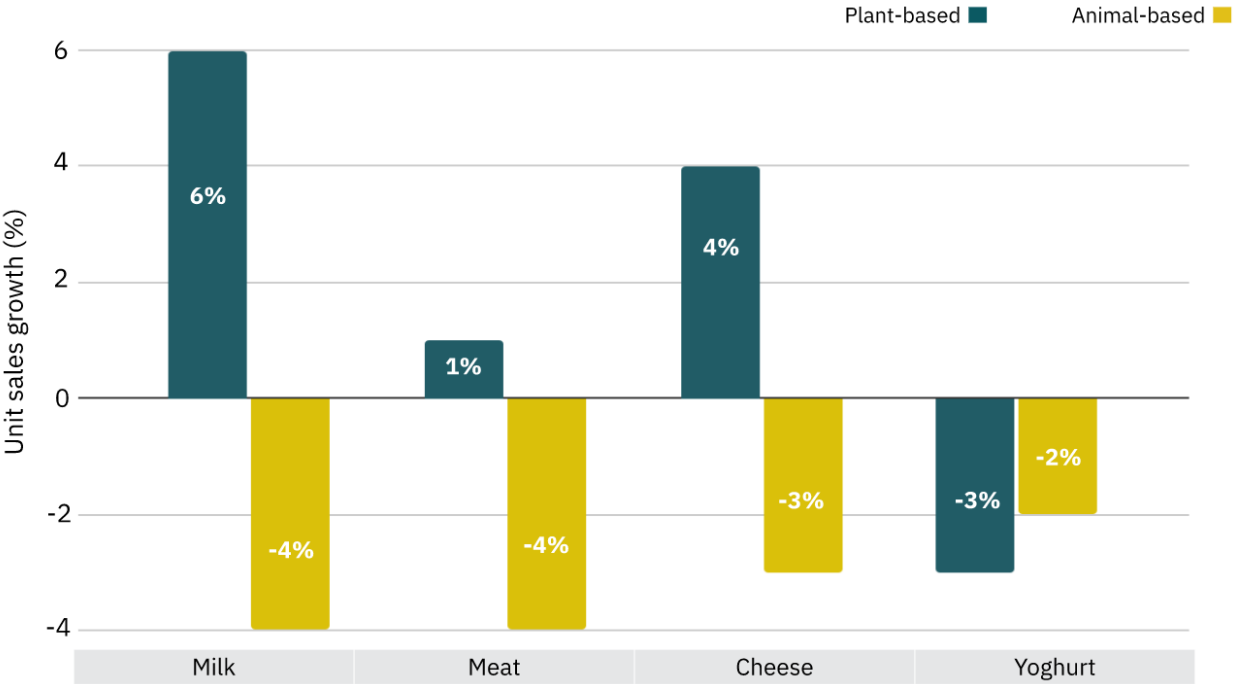


Europe-wide average plant-based food spend per country per capita (in €), 2022



Comparison to animal-based foods

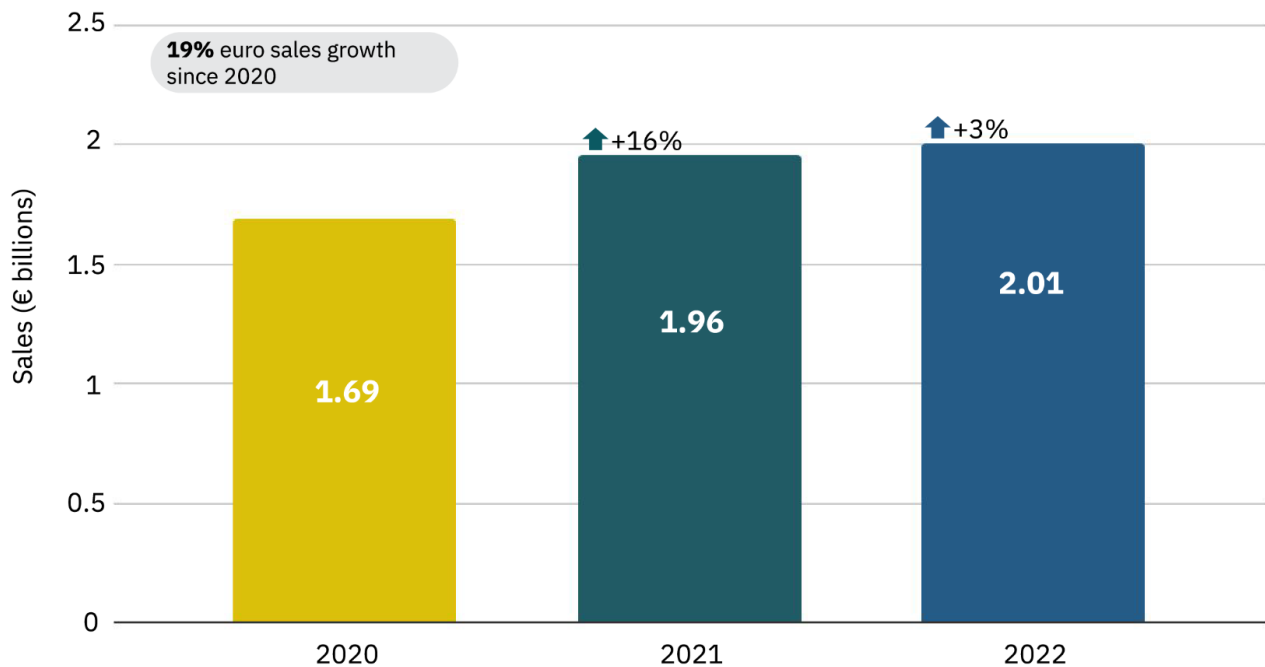
Europe-wide plant-based vs animal-based category unit sales growth, 2022



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

Plant-based meat²³

Europe-wide plant-based meat sales (in € billions), 2020-2022



Key insights:

- The value of plant-based meat sales grew by 19% between 2020 and 2022, outpacing the growth of conventional meat sales by almost five times.
- The unit sales comparison is even more striking. While plant-based meat unit sales grew 21% between 2020 and 2022, conventional meat unit sales decreased by 8%.
- In terms of average price per unit, the plant-based meat category has been less impacted by inflation and price increases in 2022. Plant-based meat prices increased by 1%, whereas conventional meat prices increased by 11%.
- In 2022, plant-based meat had a 6% market share of the total retail pre-packaged meat category.⁴

² European plant-based meat sales figures are based on available data from Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, and the UK.

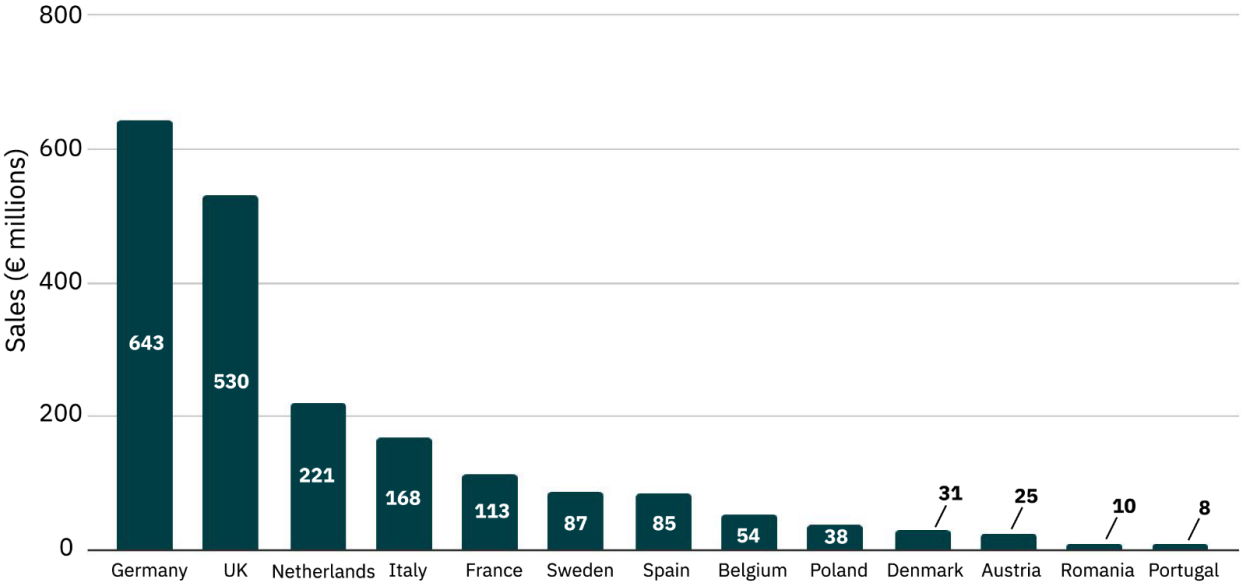
³ The plant-based meat category includes both analogues (products that mimic the appearance and taste of animal-based meat) and non-analogues (e.g. vegetable-based patties). It does not include tofu/seitan.

⁴ Nielsen only reports on pre-packaged animal-based meat sales, therefore the market share calculation is only for the pre-packaged meat category.

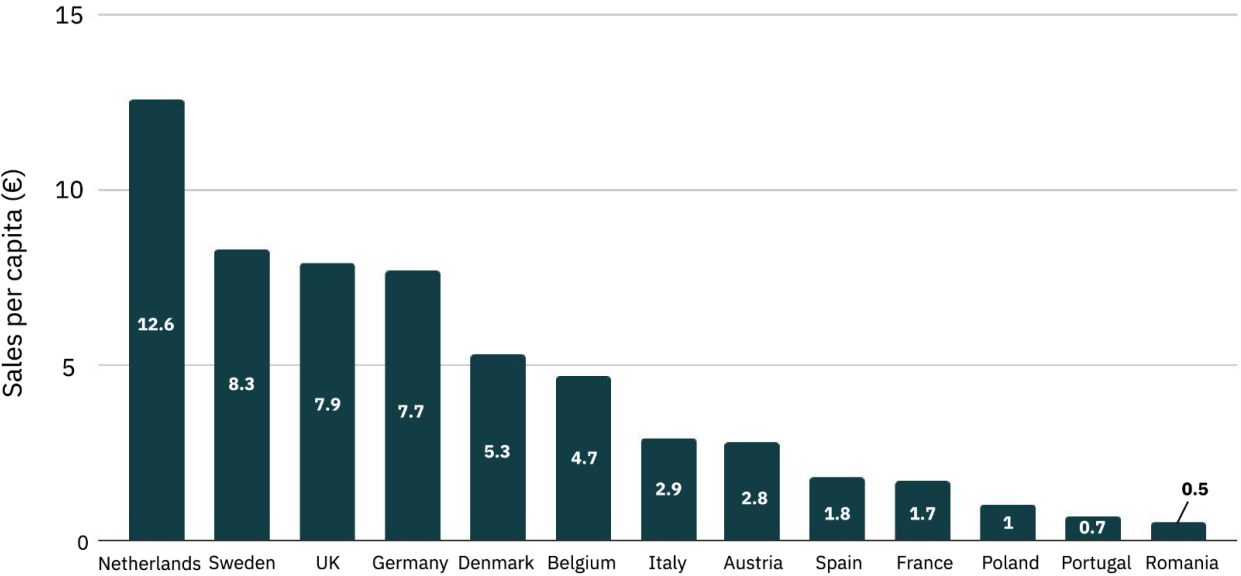
Country comparison

Germany has the highest plant-based meat sales value in Europe, but the Netherlands has the highest average plant-based meat spend per capita.

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

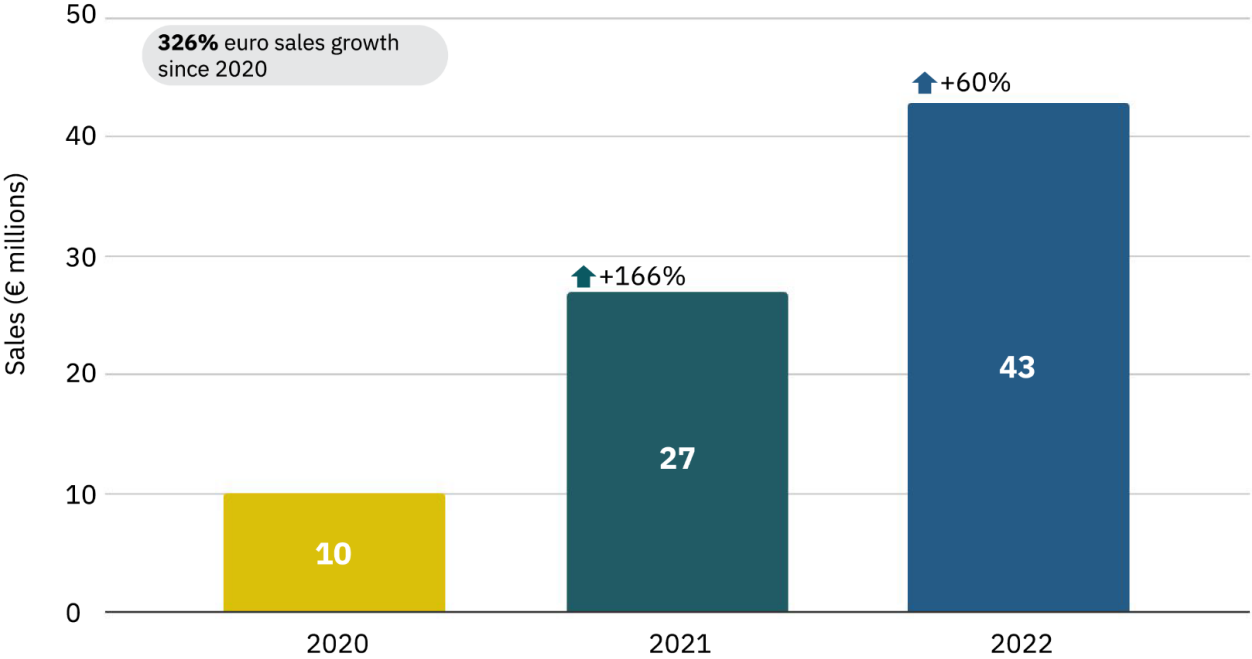


Average plant-based meat spend per country per capita (in euros), 2022



Plant-based seafood⁵

Europe-wide plant-based seafood sales (in € millions), 2020-2022



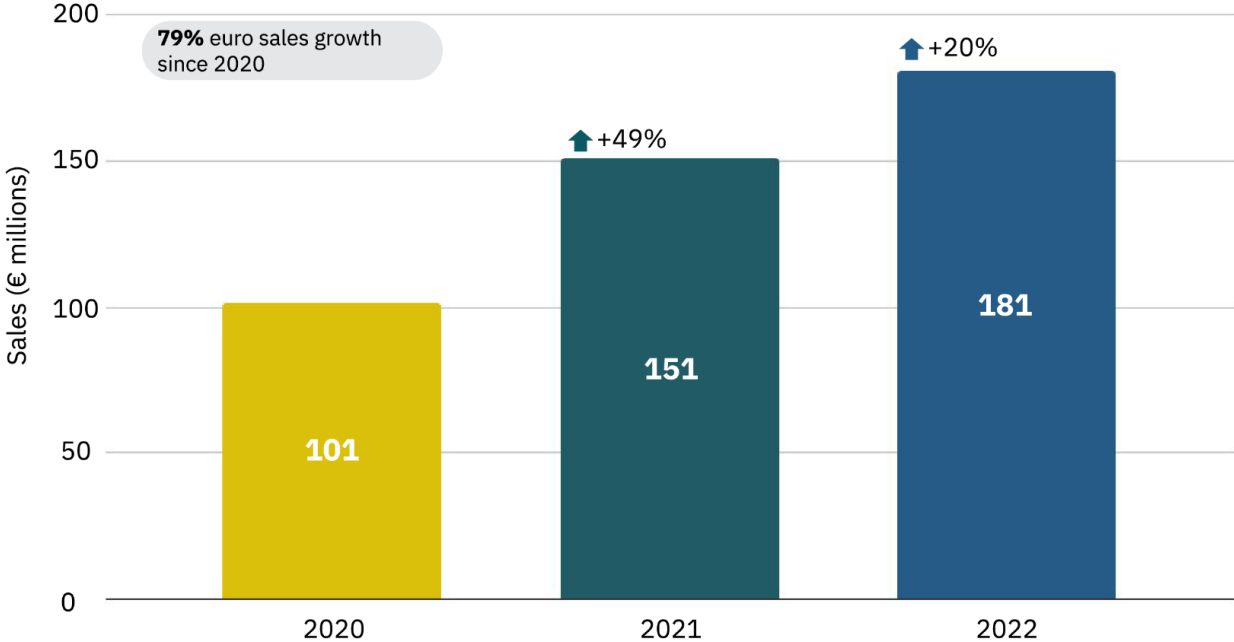
Key insights:

- The value of plant-based seafood sales grew by 326% between 2020 and 2022.
- Plant-based seafood unit sales grew by 343% between 2020 and 2022.
- The plant-based seafood category is one of the few categories that saw the average price per unit go down in 2022, decreasing by 4%.

⁵ European plant-based seafood sales figures are based on available data from Austria, Belgium, Germany, and Spain. There is no plant-based seafood data for Denmark, France, Italy, Netherlands, Poland, Portugal, Romania, Sweden, and the UK.

Plant-based meals⁶⁷

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



Key insights:

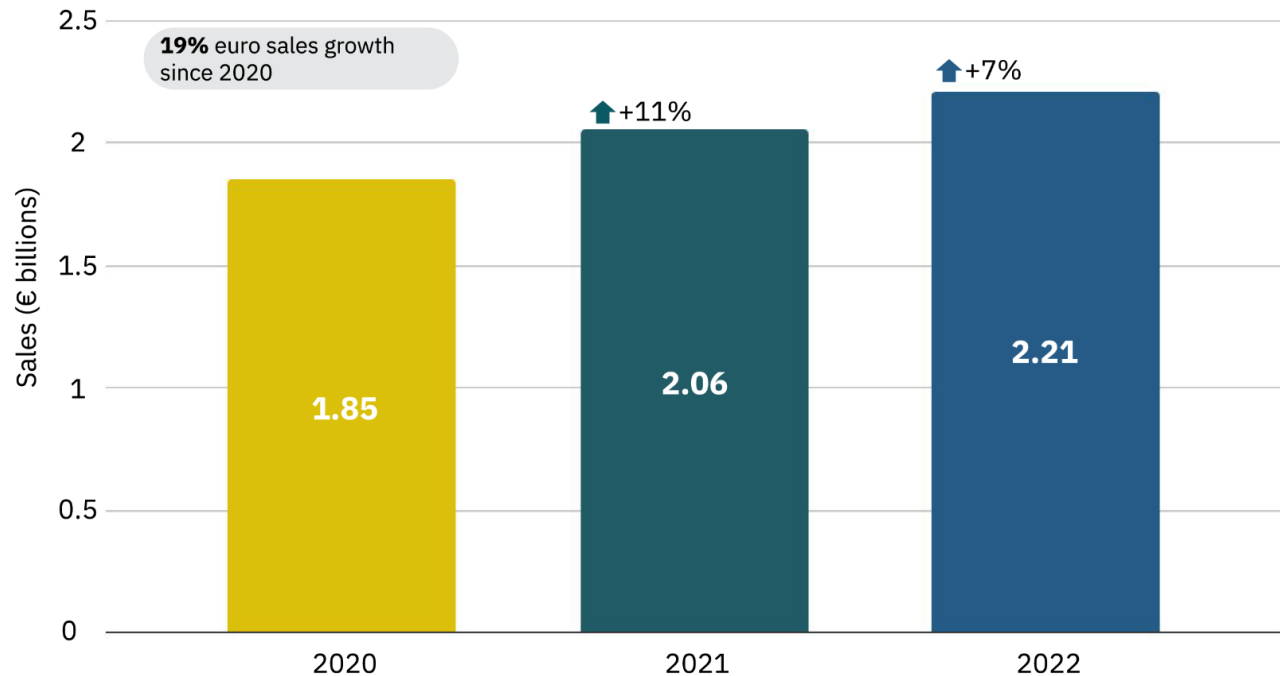
- The value of plant-based meal sales grew by 79% between 2020 and 2022.
- Plant-based meal unit sales grew accordingly by 71% between 2020 and 2022.
- The average price per plant-based meal unit in 2022 increased by 6%.

⁶ European plant-based meals sales figures are based on available data from Denmark, Germany, and Italy. There is no plant-based meals data for Austria, Belgium, France, Netherlands, Poland, Portugal, Romania, Spain, Sweden, and the UK.

⁷ The plant-based meal category covers refrigerated, shelf-stable, and frozen prepared meals including sandwiches, curries, pasta, and vegetable dishes.

Plant-based milk⁸

Europe-wide plant-based milk sales (in € billions), 2020-2022



Key insights:

- The value of plant-based milk sales grew by 19% between 2020 and 2022, almost twice as much as conventional milk.
- The unit sales comparison is even more striking. While plant-based milk unit sales grew 20% between 2020 and 2022, conventional milk unit sales decreased by 9%.
- In terms of average price per unit, the plant-based milk category has been less impacted by inflation and price increases in 2022. Plant-based milk prices increased by 1%, whereas conventional milk prices increased by 17%.
- In 2022, plant-based milk had an 11% market share of the total milk category.

Segment insights:

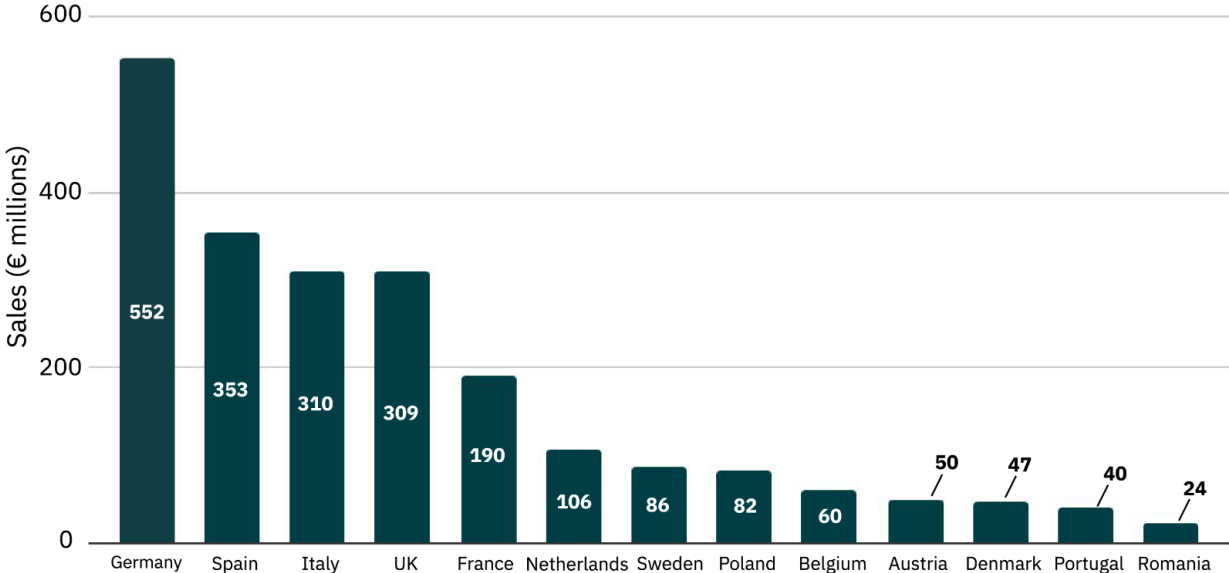
- Oat milk is the category leader, followed by soy milk and almond milk. Furthermore, oat milk is the only segment seeing growth in sales by value, whereas both soy milk and almond milk sales are decreasing.

⁸ European plant-based milk sales figures are based on available data from Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, and the UK.

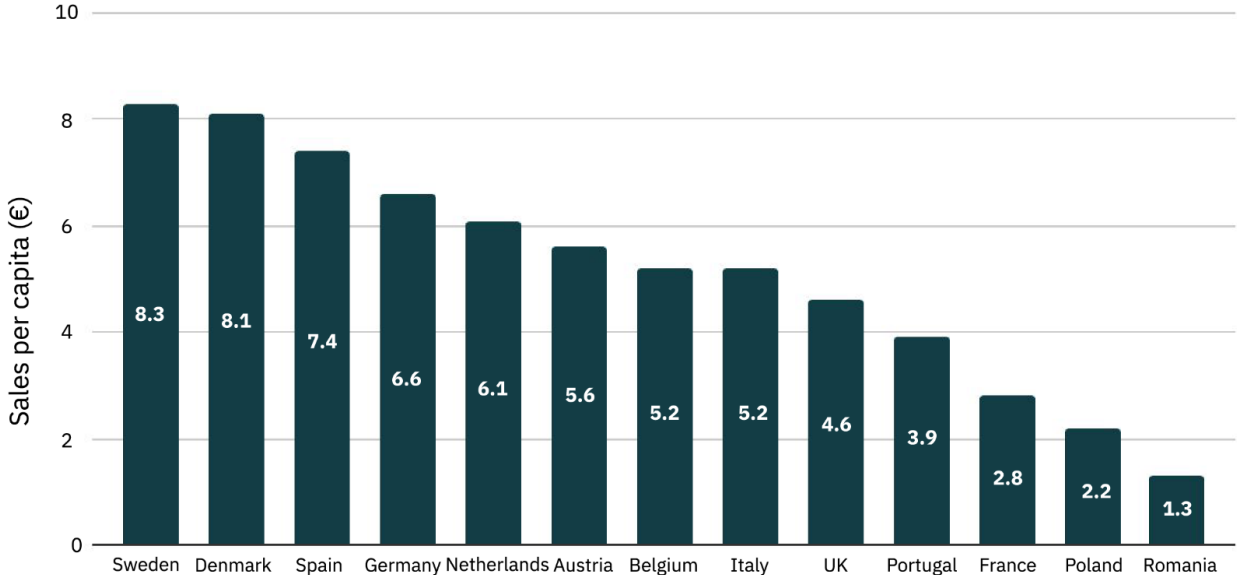
Country comparison

Germany has the highest plant-based milk sales value in Europe, but Sweden has the highest average plant-based milk spend per capita.

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

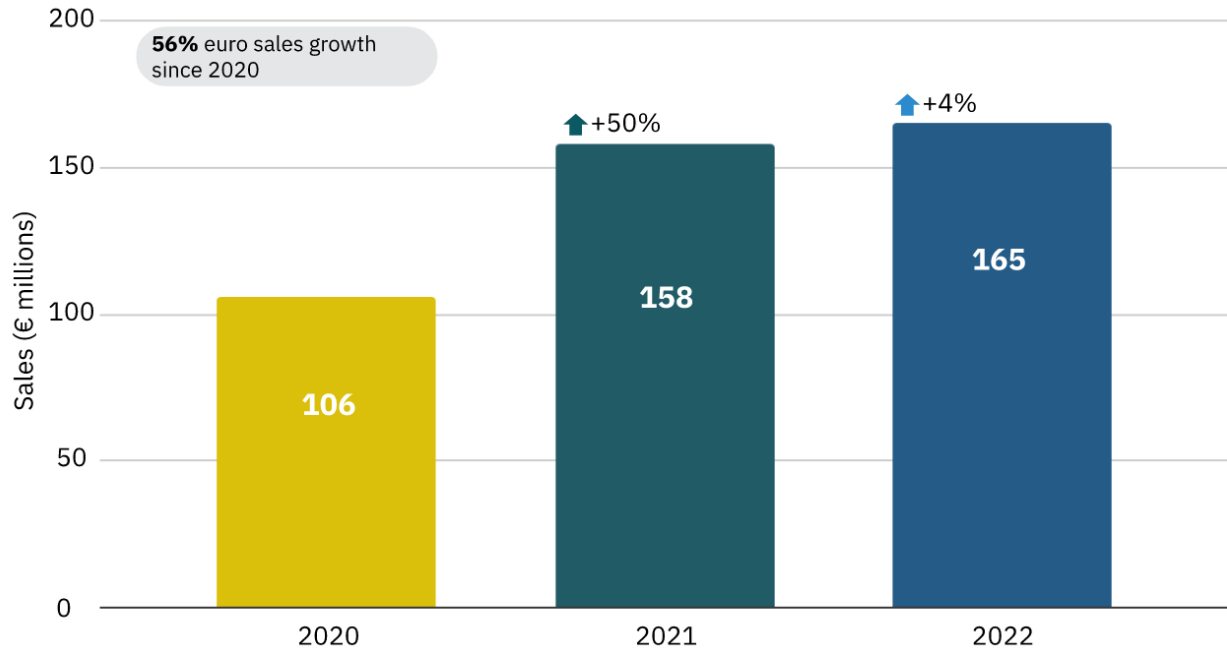


Average plant-based milk spend per country per capita (in euros), 2022



Plant-based cheese⁹

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



Key insights:

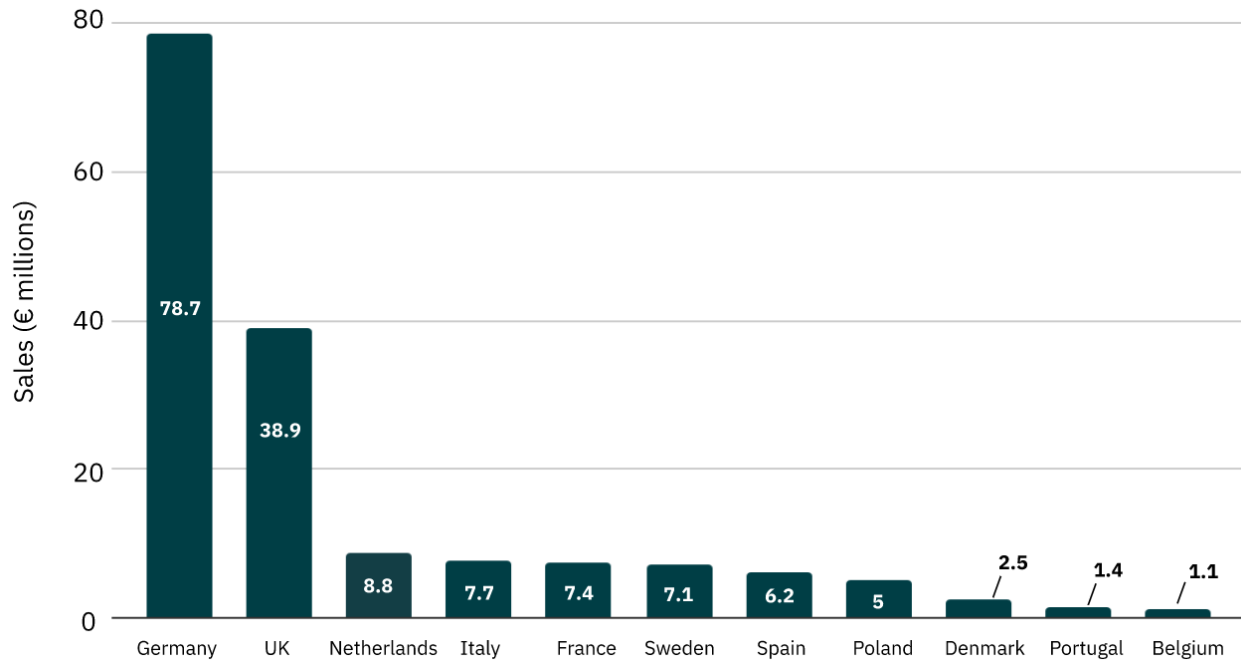
- The value of plant-based cheese sales grew 56% between 2020 and 2022, more than 6 times as much as conventional cheese.
- While plant-based cheese unit sales grew 62% between 2020 and 2022, conventional cheese unit sales decreased by 4%.
- In terms of average price per unit, the plant-based cheese category was less impacted by inflation and price increases in 2022. Plant-based cheese prices actually decreased by 0.1%, whereas conventional cheese prices increased by 12%.
- In 2022, plant-based cheese had a 0.5% market share of the total cheese category.

⁹ European plant-based cheese sales figures are based on available data from Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Portugal, Spain, Sweden, and the UK. There is no plant-based cheese data for Austria and Romania.

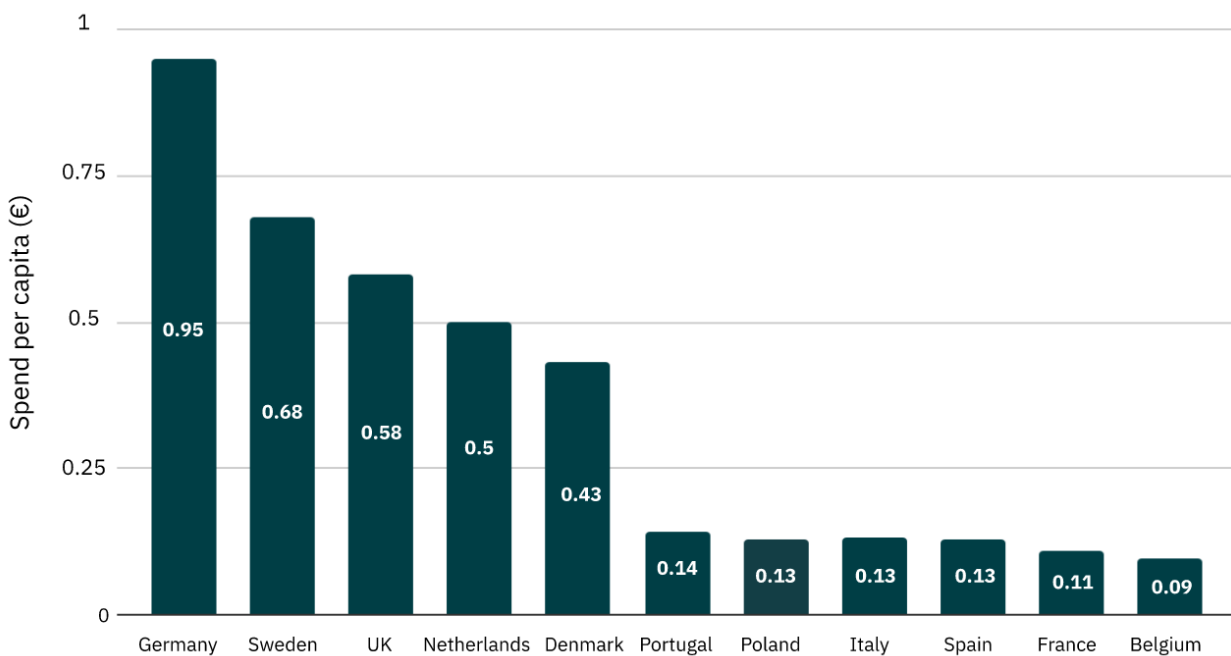
Country comparison

Germany has the highest plant-based cheese sales value in Europe and the highest average plant-based cheese spend per capita.

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

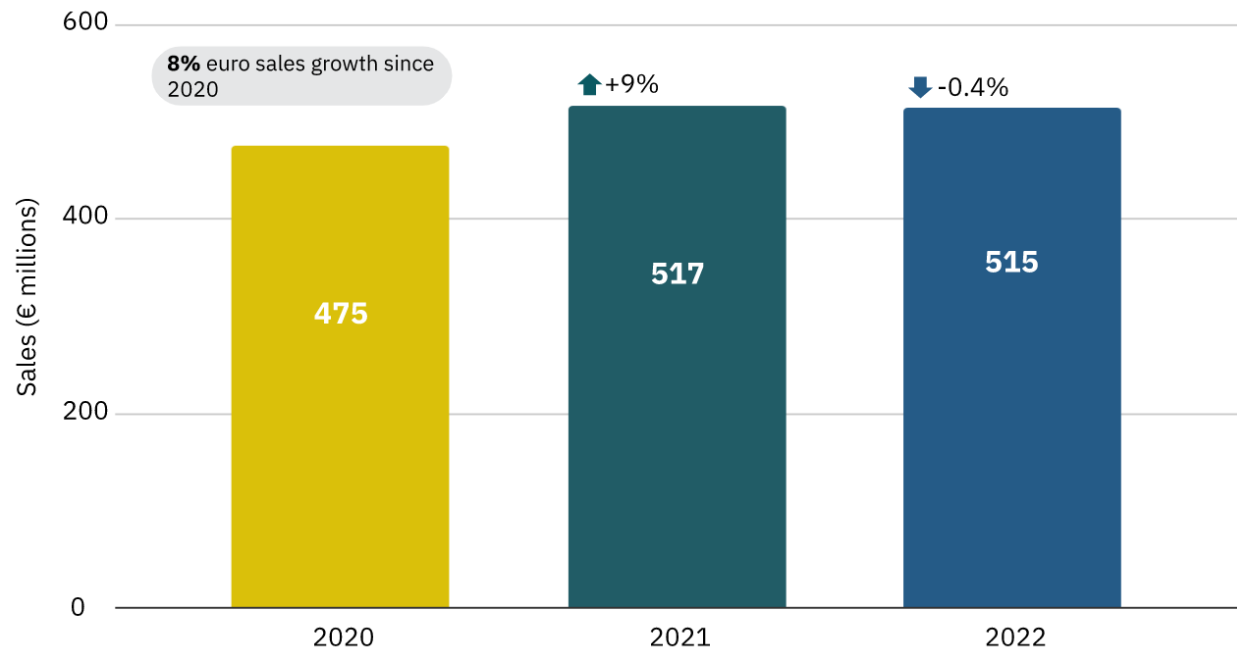


Average plant-based cheese spend per country per capita (in euros), 2022



Plant-based yoghurt¹⁰

Europe-wide plant-based yoghurt sales (in € millions), 2020-2022



Key insights:

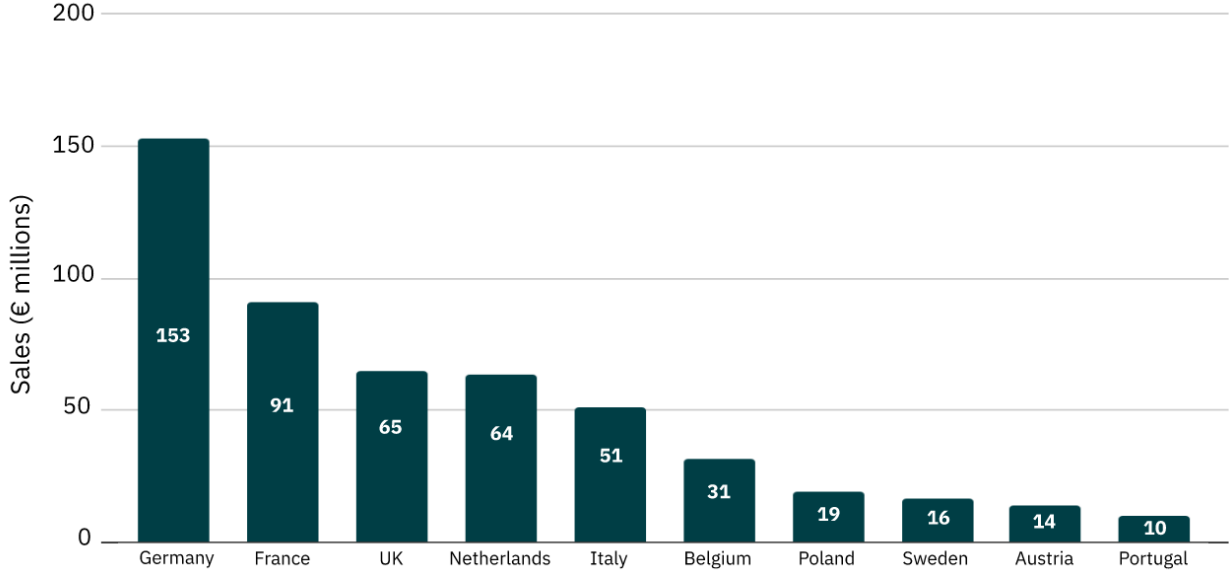
- The value of plant-based yoghurt sales grew by 8% between 2020 and 2022, and unit sales grew by 10%.
- In comparison, conventional yoghurt unit sales decreased by 4% between 2020 and 2022.
- In terms of average price per unit, the plant-based yoghurt category was less impacted by inflation and price increases in 2022. Plant-based yoghurt prices increased by 3%, whereas conventional yoghurt prices increased by 10%.
- In 2022, plant-based yoghurt had a 4% market share of the total yoghurt category.

¹⁰ European plant-based yoghurt sales figures are based on available data from Austria, Belgium, France, Germany, Italy, Netherlands, Poland, Portugal, Sweden, and the UK. There is no plant-based yoghurt data for Denmark, Romania, and Spain.

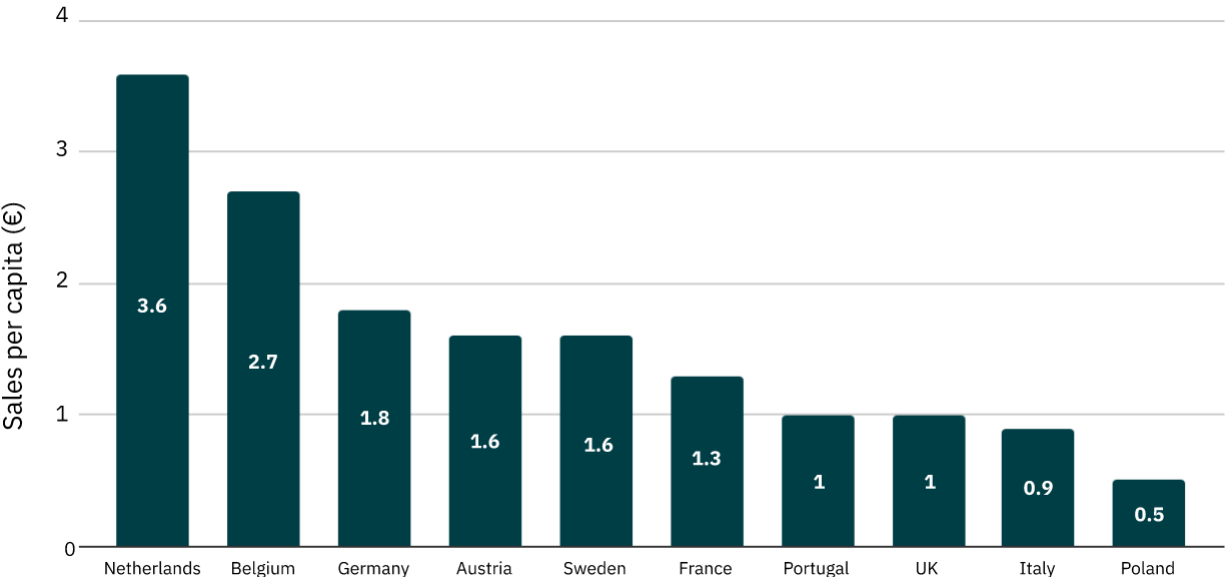
Country comparison

Germany has the highest plant-based yoghurt sales value in Europe, but the Netherlands has the highest average plant-based yoghurt spend per capita.

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

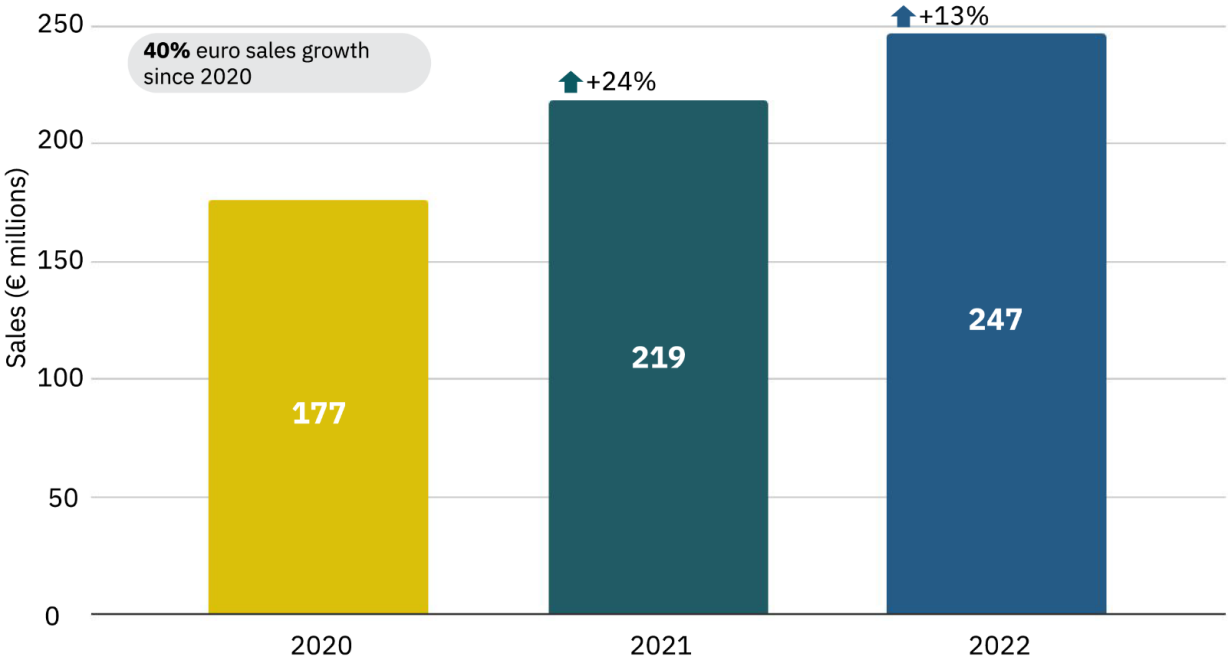


Average plant-based yoghurt spend per country per capita (in euros), 2022



Plant-based spreads¹¹¹²

Europe-wide plant-based spread sales (in € millions), 2020-2022



Key insights:

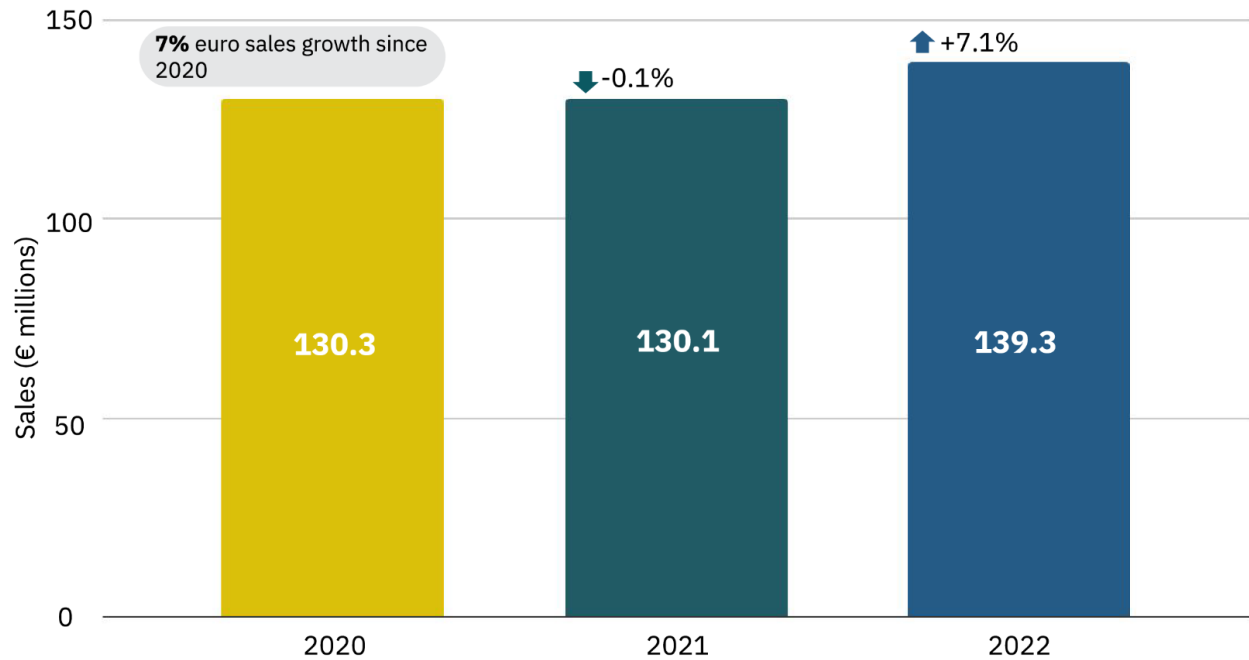
- The value of plant-based spread sales grew 40% between 2020 and 2022.
- Plant-based spread unit sales grew 26% between 2020 and 2022.
- The average price per unit of plant-based spread in 2022 increased by 8%.

¹¹ European plant-based spreads sales figures are based on available data from Denmark, Germany, Portugal, and the UK. There is no plant-based spreads data for Austria, Belgium, France, Italy, Netherlands, Poland, Romania, Spain, and Sweden.

¹² The plant-based spreads category is made up of vegetable spreads and plant-based dairy spreads.

Plant-based cream¹³

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



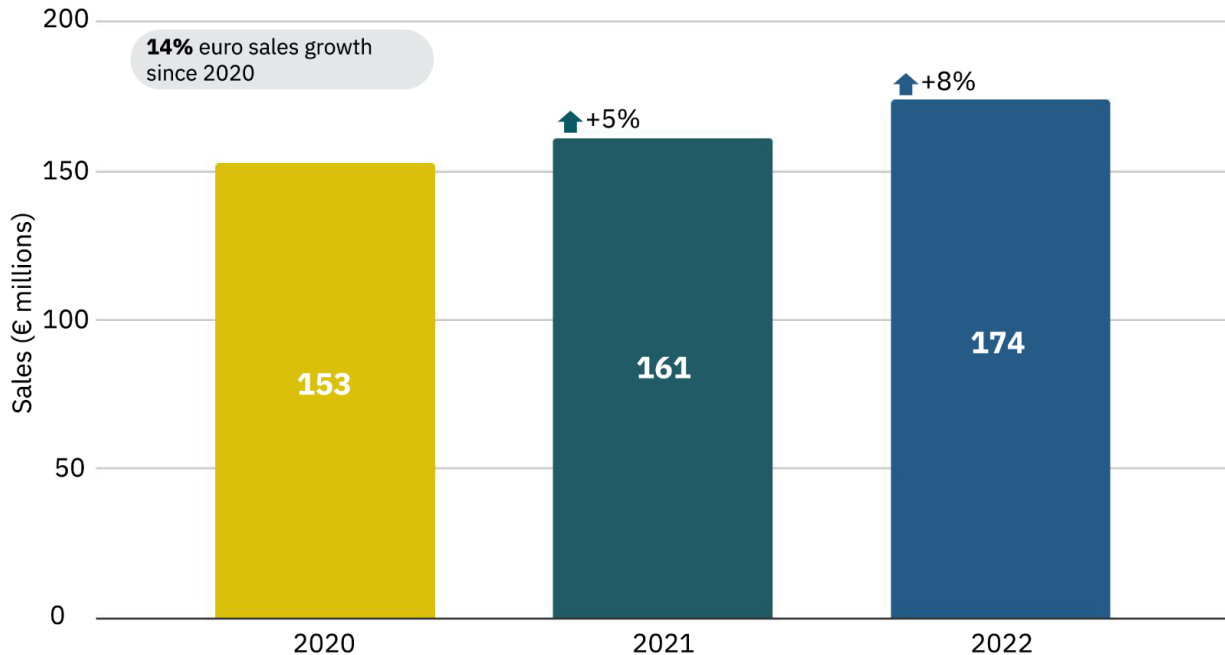
Key insights:

- The value of plant-based cream sales grew by 7% between 2020 and 2022.
- Plant-based cream unit sales grew by 1% between 2020 and 2022.
- The average price per unit of plant-based cream in 2022 increased by 7%.

¹³ European plant-based cream sales figures are based on available data from Austria, Belgium, France, Germany, Italy, Netherlands, Poland, Portugal, Spain and the UK. There is no plant-based cream data for Denmark, Romania, and Sweden.

Plant-based ice cream¹⁴

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



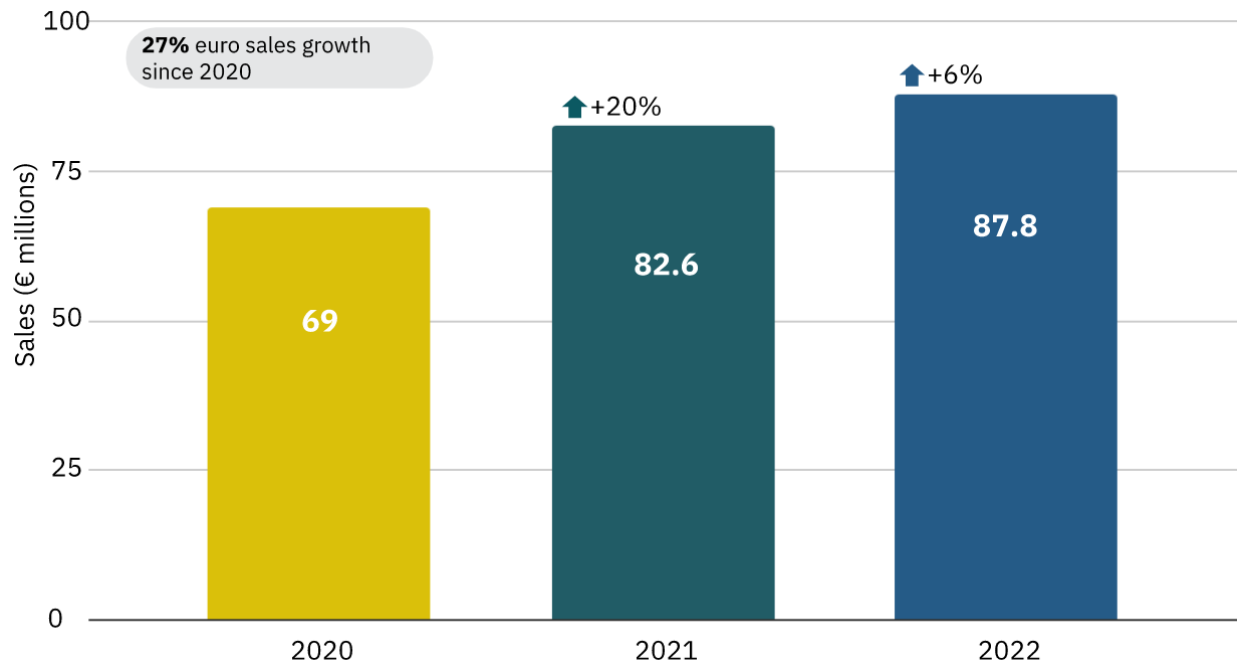
Key insights:

- The value of plant-based ice cream sales grew by 14% between 2020 and 2022.
- Plant-based ice cream unit sales grew by 15% between 2020 and 2022.
- The average price per unit of plant-based ice cream in 2022 decreased by 0.01%.

¹⁴ European plant-based ice cream sales figures are based on available data from Denmark, Germany, Italy, and the UK. There is no plant-based ice cream data for Austria, Belgium, France, Netherlands, Poland, Portugal, Romania, Spain, and Sweden.

Plant-based dessert^{15 16}

Europe-wide plant-based dessert sales (in € millions), 2020-2022



Key insights:

- The value of plant-based dessert sales grew by 27% between 2020 and 2022.
- Plant-based dessert unit sales grew by 40% between 2020 and 2022.
- The average price per unit of plant-based dessert in 2022 increased by 1.5%.

¹⁵ European plant-based dessert sales figures are based on available data from Austria, Belgium, France, Germany, Italy, Netherlands, Poland, Portugal and the UK. There is no plant-based dessert data for Denmark, Romania, Spain, and Sweden.

¹⁶ The plant-based dessert category is primarily made up of pudding.

Closing remarks

“The plant-based food retail market in Europe has seen significant growth in recent years, driven by better plant-based products being brought to market. This is encouraging as the world works to address the many problems caused by industrial animal agriculture. However, to sustain this growth, companies must continue investing in product innovation to develop plant-based products that meet consumer expectations when it comes to the key drivers of taste, price, and convenience. The Good Food Institute’s [Advancing Solutions for Alternative Proteins database](#) is a great source to better understand key innovation priorities.”

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



About the data

To size the European 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 Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, and UK markets, 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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