



Italy plant-based food retail market insights

2021 to 2023 with initial insights into the 2024
market



Executive Summary

This report shows the trends in retail sales across seven plant-based product categories (meat, milk and drinks, cheese, yoghurt, ice cream, dessert and cream) in Italy between 2021 and 2023, based on data from Circana. It also presents initial insights into how the 2024 market is developing.

The Italian retail market for plant-based food was **valued at €641 million** in 2023.

The total annual sales value of plant-based foods in Italy **grew by 16%** between 2021 and 2023.

Total unit sales of plant-based foods in Italy **grew by 5.8%** between 2021 and 2023.

Sales across seven plant-based categories totalled €641 million in 2023 – an increase of 16.1% compared with 2021 and an increase of 8% compared with 2022. This increase is partly driven by inflation, but despite rising prices, demand for plant-based food continues to increase: unit sales increased by 5.8% and sales volume increased by 2.6% between 2021 and 2023. Between 2022 and 2023, unit sales increased 2.8% while sales volume increased 0.2%. Plant-based foods are not unique in becoming more expensive. In Italy, food inflation [reached](#) a historic peak of 13.6% in November 2022, before falling again.

Sales volume in Italy grew in four out of seven plant-based product categories between 2021 and 2023, while sales value grew in all seven categories over the same time period.

Plant-based cheese is experiencing particularly striking sales growth. Although still a small and emerging category, sales value increased by 79.6% between 2021 and 2023.

Italy plant-based sales summary by category, 2021-2023

	Sales value			Unit sales			Sales volume		
	2023, € million	2022-23 change	2021-23 change	2023, million units	2022-23 change	2021-23 change	2023, million kg	2022-23 change	2021-23 change
Meat	199.0	12.8%	24.2%	75.8	10.1%	15.1%	14.6	7.6%	11.4%
Milk and drinks	315.1	4.6%	10.9%	159.2	0.0%	2.4%	151.5	-0.4%	2.1%
Cheese	15.2	39.9%	79.6%	6.7	28.5%	71.2%	1.0	33.1%	77.3%
Yoghurt	57.0	7.5%	10.2%	39.9	1.9%	2.0%	9.4	-0.8%	-1.9%
Ice cream	37.0	5.2%	17.3%	10.3	-4.4%	1.8%	3.4	-4.7%	0.9%
Dessert	9.9	3.9%	8.0%	5.8	-4.3%	-4.5%	1.7	-3.4%	-3.0%
Cream	7.5	7.6%	11.2%	5.2	-2.1%	-8.3%	1.4	-4.0%	-11.6%
Total	640.8	8.0%	16.1%	302.9	2.8%	5.8%	183.0	0.2%	2.6%

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 supermarkets and discount stores. It does not include food service sales, such as restaurants.

Data for 2021, 2022 and 2023 covers the whole year. Data for 2024 covers only part of the year: from January to April. Since partial-year data for 2024 is not directly comparable to full-year data for the other years, 2024 data in this report is presented as a comparison to the same time period in 2023, i.e. January to April 2023.

For the Italian data, the specific dates covered by each time period are:

- Full-year 2021: 4 January 2021 to 2 January 2022
- Full-year 2022: 3 January 2022 to 1 January 2023
- Full-year 2023: 2 January 2023 to 31 December 2023
- Partial-year 2023: 2 January 2023 to 30 April 2023
- Partial-year 2024: 1 January 2024 to 28 April 2024

Note 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 items derived from farmed animals, such as meat from chickens or milk from cows.

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

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

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

PY 2024: partial year data for 2024, with the exact dates depending on the product category. Exact dates are indicated in graph titles and explanatory text.

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 fraction is calculated by dividing plant-based sales by the sum of plant-based and animal-based sales. In this report, market share has mostly been calculated on the basis of sales volume; however, it can also be calculated on the basis of sales value. Note that in this report, market share is calculated based only on retail sales of pre-packaged products. It does not account for sales in restaurants or products that are not pre-packaged.

Table of contents

Executive Summary	2
About the data	4
Key terms	5
Table of contents	6
Overall plant-based food market	8
Total Italian plant-based market	8
Categories	10
Comparison to animal-based foods	11
Plant-based meat	12
Total market	12
Product format breakdown	14
Price trends	15
Plant-based milk and drinks	16
Total market	16
Product format breakdown	18
Market share	19
Price trends relative to animal equivalent	19
Plant-based cheese	20
Total market	20
Product format breakdown	21
Market share	21
Price trends relative to animal equivalent	22
Plant-based yoghurt	23
Total market	23
Product format breakdown	24
Market share	24
Price trends relative to animal equivalent	25
Plant-based ice cream	26
Total market	26
Product format breakdown	28
Price trends	28
Plant-based dessert	29
Total market	29
Product format breakdown	31

Price trends	32
Plant-based cream	33
Total market	33
Product format breakdown	35
Price trends	35
Closing remarks	36
About the Good Food Institute Europe	37
Contact	37

Overall plant-based food market

Total Italian plant-based market

Italy’s plant-based market is growing despite rising prices.

Between 2021 and 2023, total sales value across seven plant-based categories (meat, milk and drinks, cheese, yoghurt, cream, ice cream and dessert) grew by 16.1%, reaching €641 million in 2023.

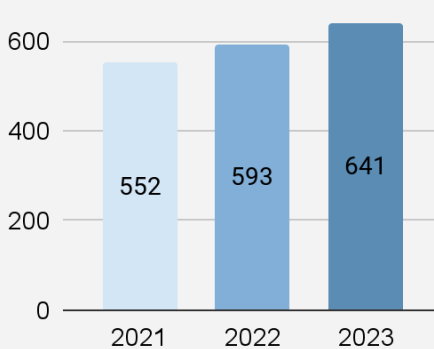
Meanwhile, unit sales grew by 5.8% to 303 million units, and sales volume rose by 2.6% to 183 million kg. Most of the increase in sales volume happened between 2021 and 2022, with volume increasing only 0.2% between 2022 and 2023.

Between 2022 and 2023, the changes in annual sales were: an 8% increase in sales value, a 2.8% increase in unit sales and a 0.2% increase in volume sales.

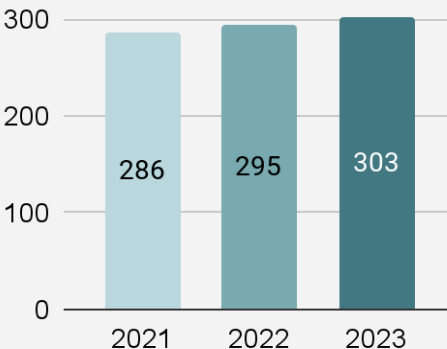
Partial-year data covering January to April 2024 shows that the total sales value, unit sales and sales volume across the seven plant-based product categories continued to increase, compared to the same time period in 2023.

Plant-based food sales across seven categories in Italy, 2021-2023

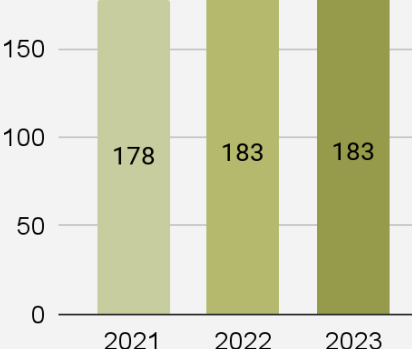
Sales value (€ millions)



Units sold (millions)



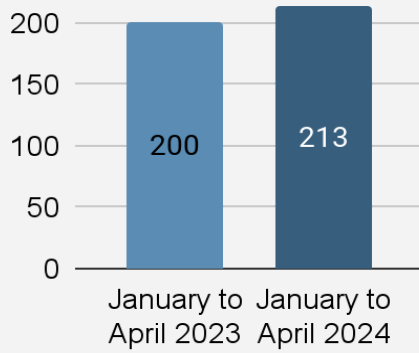
Volume sold (millions of kg*)



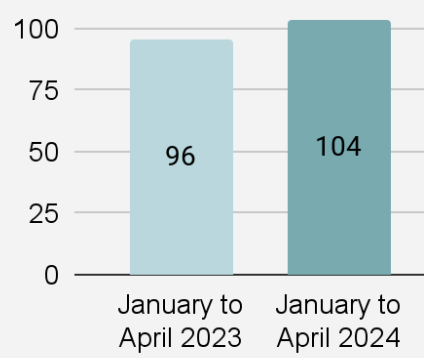
*Volume sales were measured in litres for plant-based milk and in kilograms for all other categories. For the total sales volume, the data has been combined by assuming that one litre of plant-based milk weighs approximately 1kg.

Plant-based food sales across seven categories in Italy, January-April

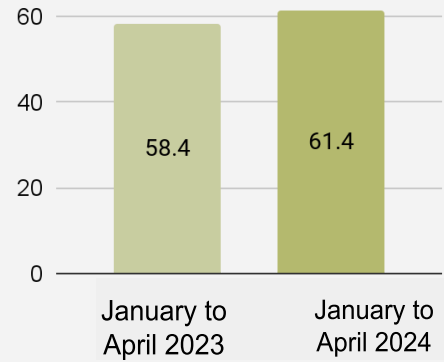
Sales value (€ millions)



Units sold (millions)



Volume sold (millions of kg*)

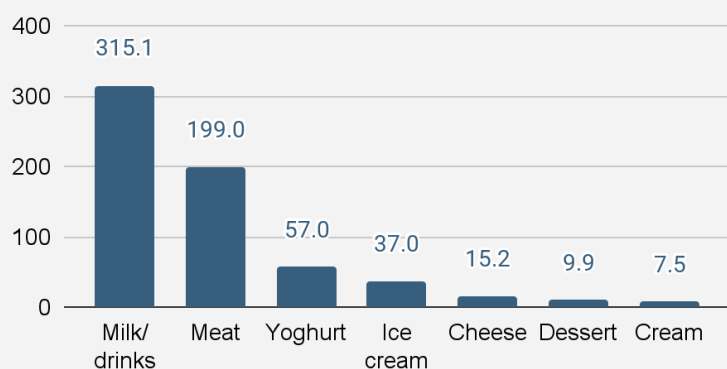


Categories

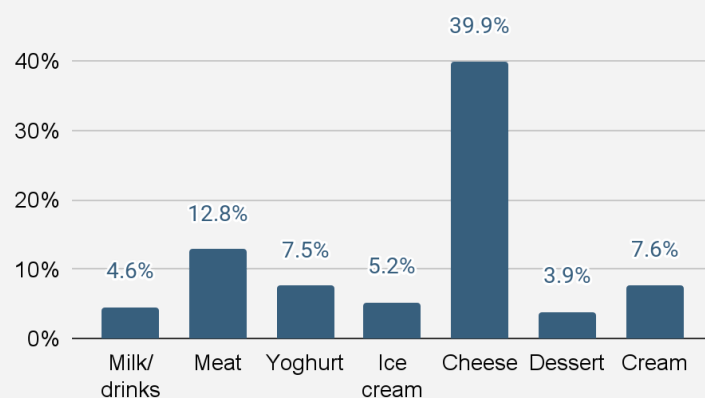
The largest plant-based categories in Italy are milk and drinks, and meat, accounting for 49% and 31% of overall sales value, respectively, across seven plant-based categories in 2023. Plant-based milk and drinks have become mainstream in Italy, representing 10.6% of total sales value and 7.4% of total sales volume of plant-based milk and drinks and animal-based milk in 2023.

All seven categories saw an increase in sales value between 2022 and 2023, with particularly strong sales growth seen in the emerging category of plant-based cheese. Even the plant-based meat category, which is the second largest plant-based category in Italy, saw significant growth at 12.8%, suggesting that demand for plant-based meat is not yet saturated.

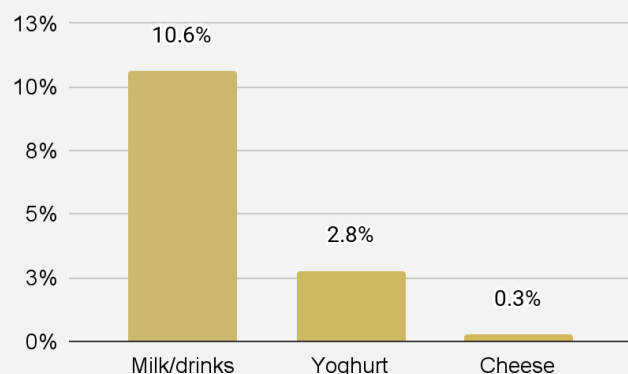
Plant-based food sales value by category in Italy, 2023 (€ millions)



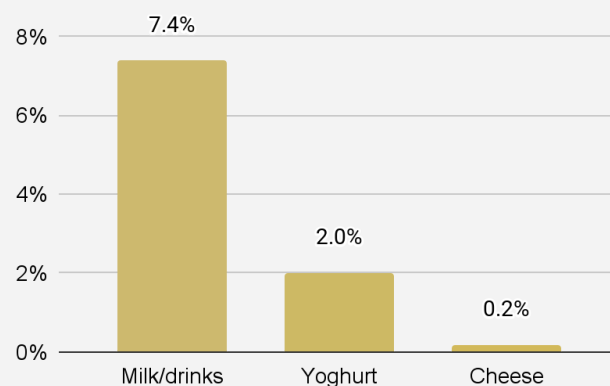
Change in sales value of plant-based foods by category in Italy, 2022-2023



Plant-based food: share of Italy's pre-packaged (plant- and animal-based) retail sales value for each category, 2023 (% of sales value)



Plant-based food: share of Italy's pre-packaged (plant- and animal-based) retail sales value for each category, 2023 (% of sales volume)



Note: total category sales (plant- and animal- based combined) were only available for three categories: Milk **and drinks**, yoghurt and cheese.

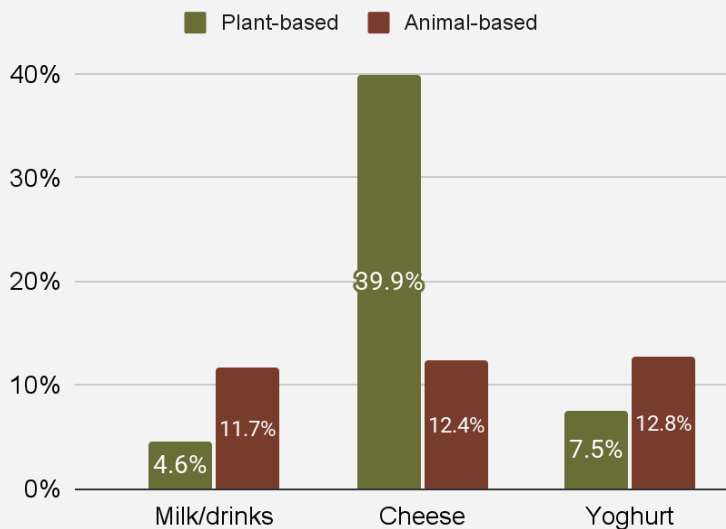
Comparison to animal-based foods

Retail data on the animal-based equivalent was available for three product categories (milk and drinks, cheese and yoghurt).

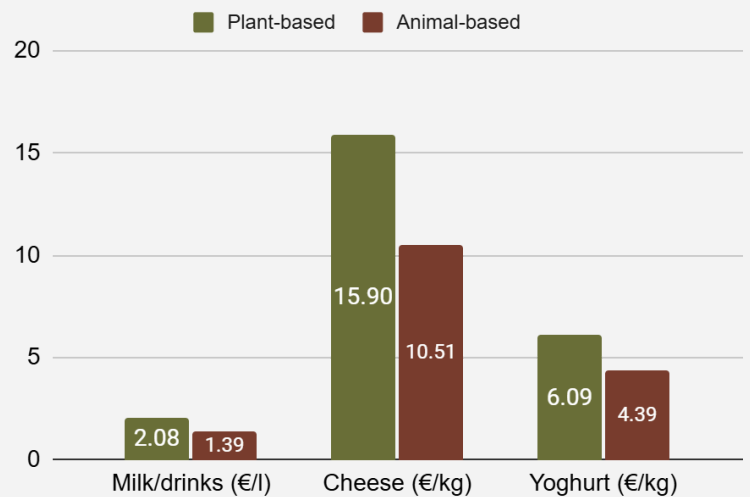
The volume of plant-based cheese sold increased significantly more between 2022 and 2023 than that of animal-based cheese – albeit from a much lower starting point.

For the milk and drinks and yoghurt categories, animal-based products grew more in sales volume, possibly rebounding after a period of high food price inflation in 2022. However, the fact that plant-based sales volume continued to increase despite plant-based foods being more expensive than their animal-based equivalents in those categories suggests that there is strong underlying demand.

Change in sales volume of plant- and animal-based foods by category in Italy, 2022-2023 (% change in sales volume)



Average price per kg or litre of plant- and animal-based foods in Italy, 2023 (€/kg or €/litre)



Plant-based meat

Total market

Between 2021 and 2023, the annual sales value of plant-based meat in Italy increased by 24.2% to €199 million. Over the same time period, unit sales increased by 15.1% to 75.8 million units and sales volume increased by 11.4% to 14.6 million kg.

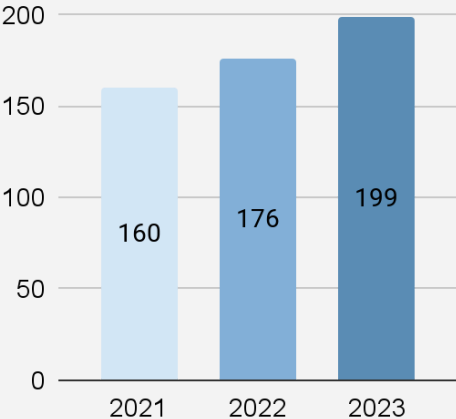
Partial-year data for 2024 (from January to April) shows a continued rise in the sales of plant-based meat, with sales value increasing by 10.4%, unit sales increasing by 13.6% and sales volume increasing by 10.5% relative to the same time period in 2023.

The Circana data for plant-based meat in Italy includes some non-analogue products such as vegetable croquettes and vegetable burgers. It was not possible to fully separate out only those products that aim to mimic the taste and texture of meat.

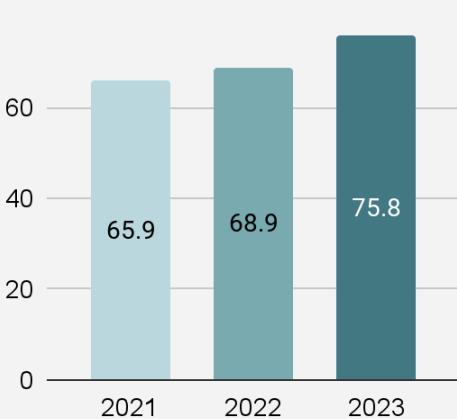
The plant-based meat category does not include tofu, tempeh or seitan. For comparison, the total sales value of those three products increased by 20% between 2021 and 2023, reaching €11 million in 2023, while sales volume increased by 14.8%. There is not a significant price difference between these products (an average of €13.73/kg in 2023) and plant-based meat (€13.60/kg), which aligns with the sales trends being similar.

Plant-based meat sales in Italy, 2021-2023

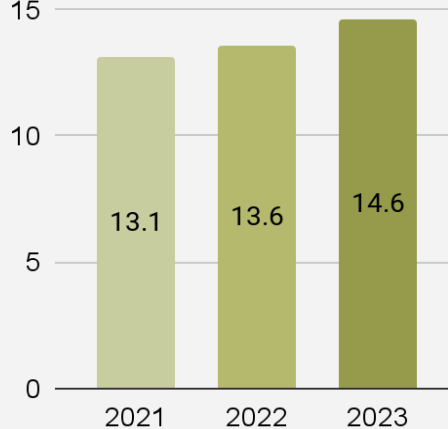
Sales value (€ millions)



Units sold (millions)

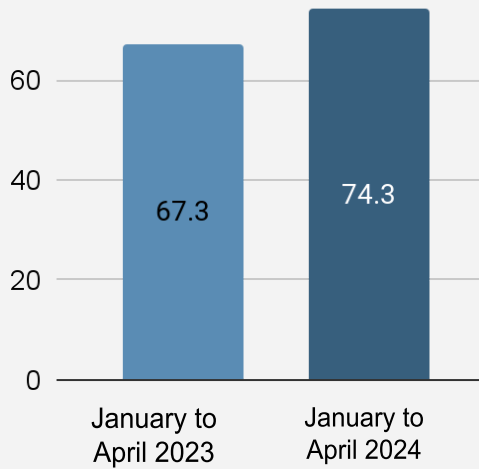


Volume sold (millions of kg)

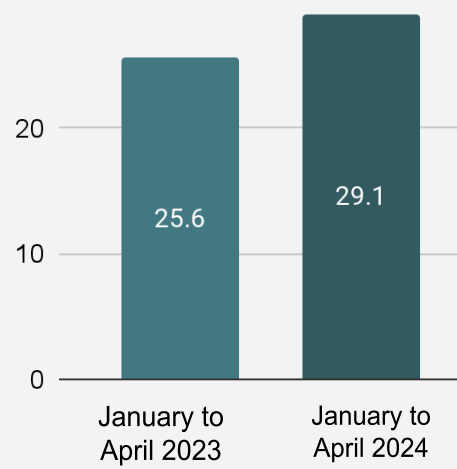


Plant-based meat sales in Italy, January-April

Sales value (€ millions)



Units sold (millions)



Volume sold (millions of kg)

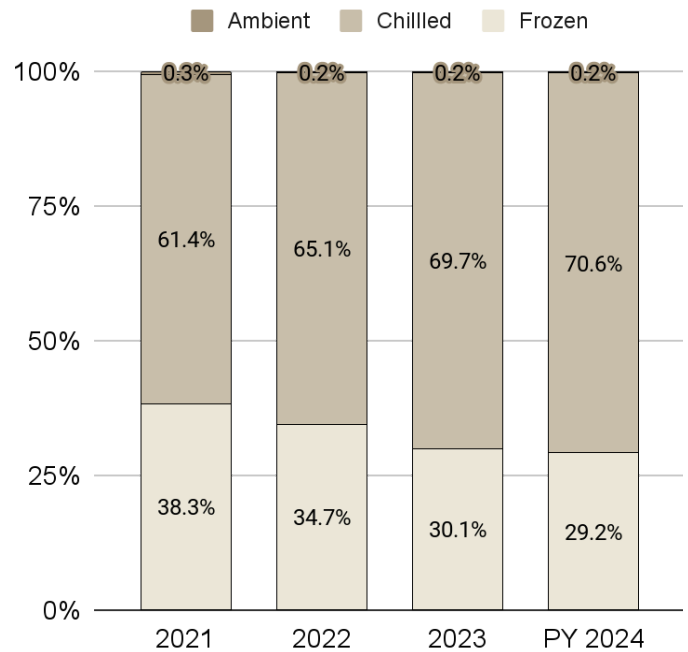


Product format breakdown

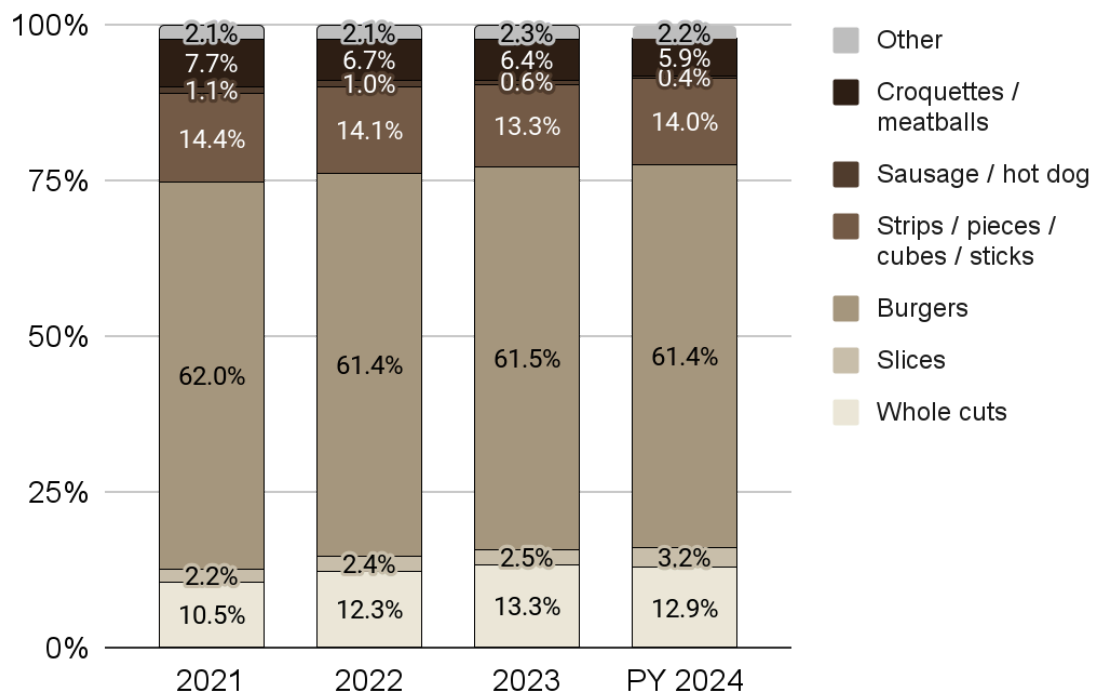
The majority of plant-based meat sales in 2023 were chilled (69.7% of sales volume), followed by frozen (30.1%) and ambient (0.2%).

The best-selling product format in 2023 was burgers (61.5% of sales volume), followed by whole cuts (13.3%) and strips/pieces/cubes/sticks (13.3%).

Italy plant-based meat sales by temperature, 2021-April 2024 (% of volume sales)



Italy plant-based meat sales by format, 2021-April 2024 (% of volume sales)



Price trends

The average price per kg of plant-based meat in Italy increased by 12% between 2021 and 2023 before falling slightly in early 2024, possibly following the rise and fall in inflation in the broader food market in Italy.

Italy: Average price per kg for plant-based meat, 2021-April 2024 (€/kg)



Plant-based milk and drinks

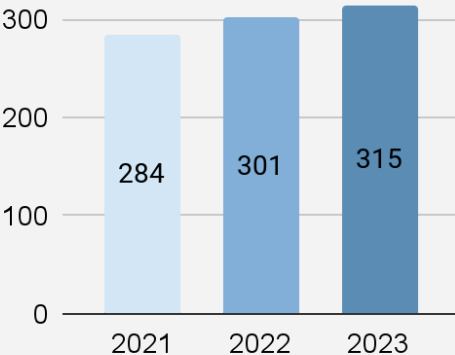
Total market

Between 2021 and 2023, the total annual sales value of plant-based milk and drinks¹ in Italy increased by 10.9% to reach €315 million. Over the same time period, unit sales increased by 2.4% to 159 million units and sales volume increased by 2.1% to 152 million litres. Most of the slight increase in sales volume happened between 2021 and 2022.

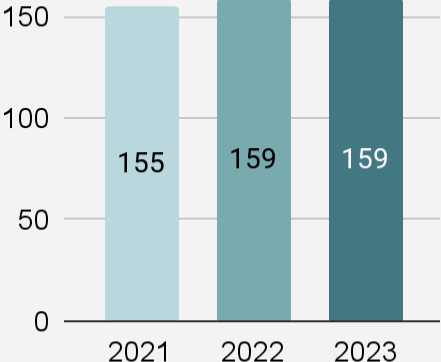
Partial-year data for 2024 indicates a continued upward trend. Between January and April 2024, sales value was up 1.8%, unit sales were up 5.1% and sales volume was up 4.5% relative to the same time period in 2023.

Plant-based milk and drinks sales in Italy, 2021-2023

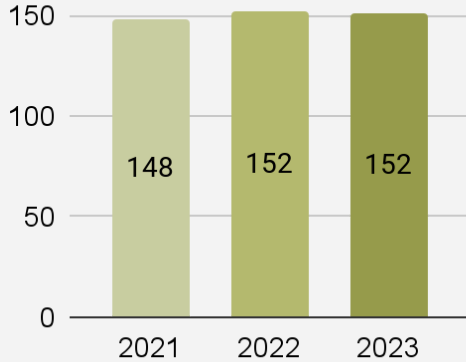
Sales value (€ millions)



Units sold (millions)



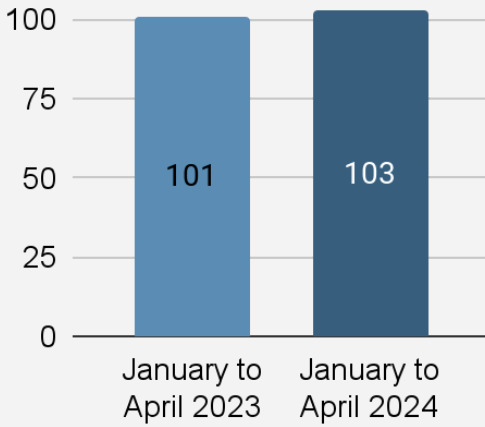
Volume sold (millions of litres)



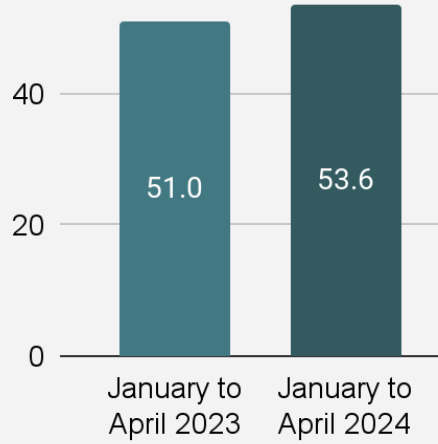
¹ The plant-based drink category includes plant-based milks as well as some other drinks containing a dairy alternative component, such as coffee drinks. It does not include drinks that are not alternatives to dairy products, such as fruit juices.

Plant-based milk and drinks sales in Italy, January-April

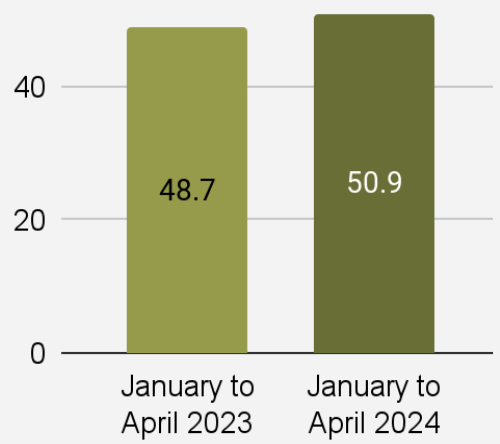
Sales value (€ millions)



Units sold (millions)



Volume sold (millions of litres)

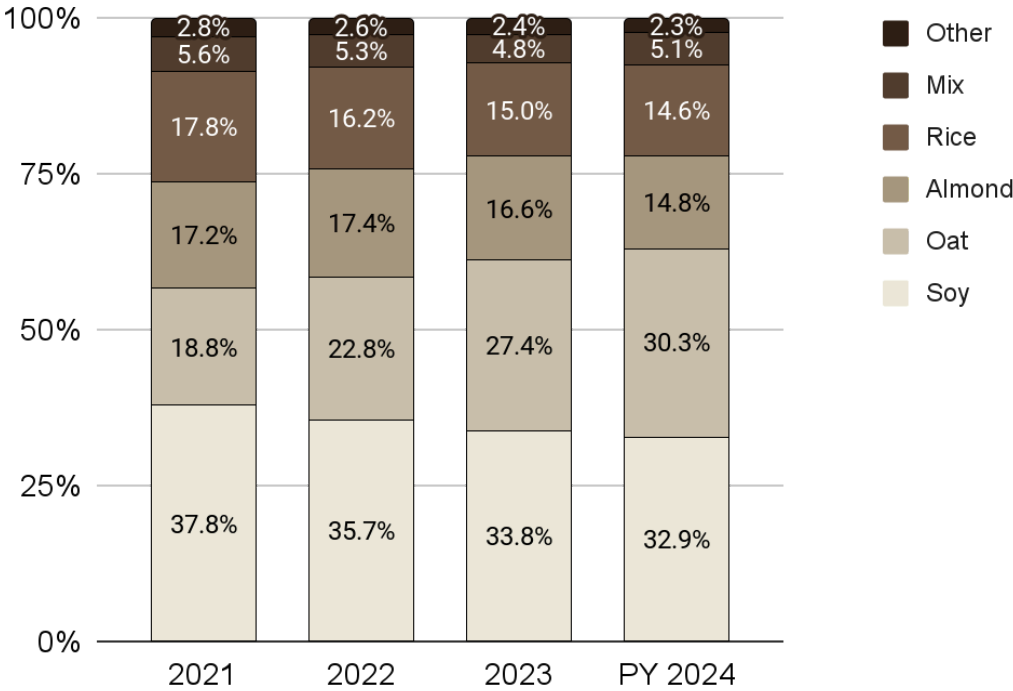


Product format breakdown

The vast majority of plant-based milk and drinks in Italy for which data is available are ambient, at 99.9% of sales volume in 2023.

In 2023, the leading segment of plant-based milk and drinks was soy, accounting for 33.8% of sales volume, followed by oat (27.4%) and almond (16.6%). The market shares of soy, almond and rice are declining over time, while that of oat is increasing.

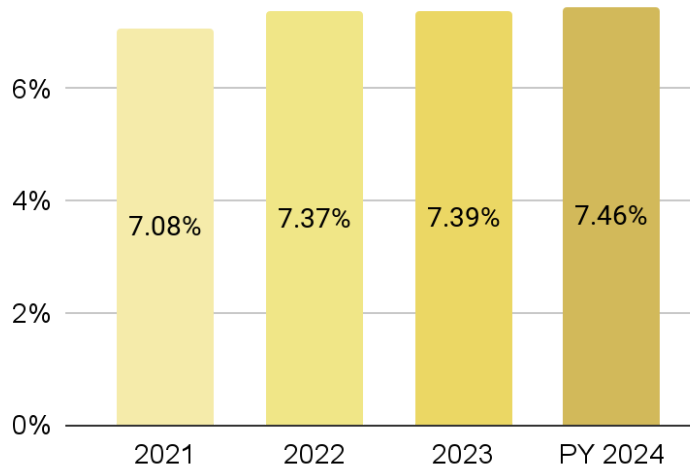
Italy plant-based milk and drinks sales by ingredient base, 2021-April 2024 (% of volume sales)



Market share

The market share of plant-based milk and drinks, as a percentage of overall sales volume of plant-based milk and drinks and animal-based milk², increased from 7.01% in 2021 to 7.46% in early 2024, after plateauing at around 7.4% in 2022 and 2023.

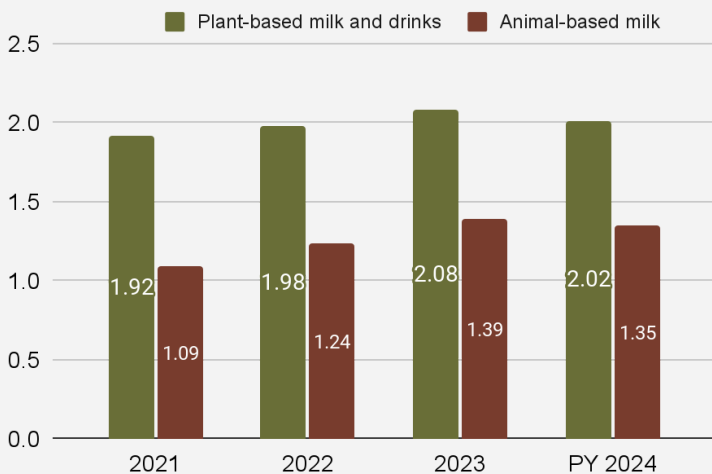
Plant-based milk and drinks: share of Italy's total (plant- and animal-based) milk market, 2021-April 2024 (% of sales volume)



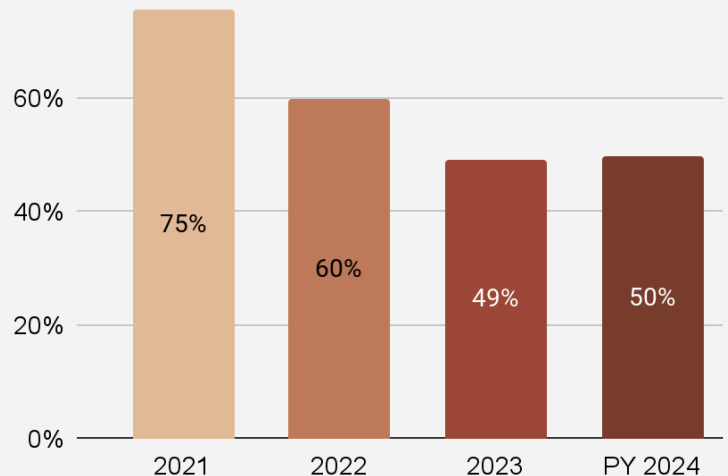
Price trends relative to animal equivalent

Plant-based milk and drinks are significantly more expensive per litre than animal-based milk, but the price gap has decreased over time. While in 2021, plant-based milk and drinks were 75% more expensive per litre than animal-based milk, that price premium had fallen to 50% by early 2024.

Italy: Average price per litre for plant-based milk and drinks and animal-based milk, 2021-April 2024 (€/litres)



Italy: price difference for plant-based milk and drinks compared to animal-based milk, 2021-April 2024 (%)



² Both fresh and long-life milk.

Plant-based cheese

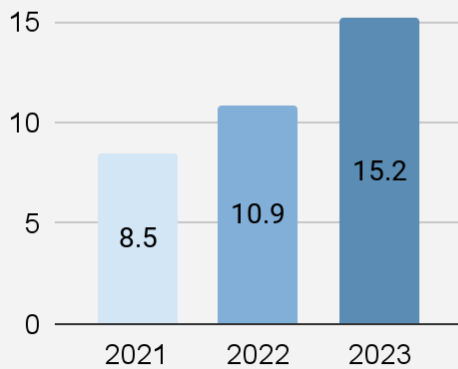
Total market

Between 2021 and 2023, the annual sales value of plant-based cheese increased by 79.6% to €15 million. Over the same time period, unit sales increased by 71.2% to 6.75 million units and sales volume increased by 77.3% to 956,000 kg.

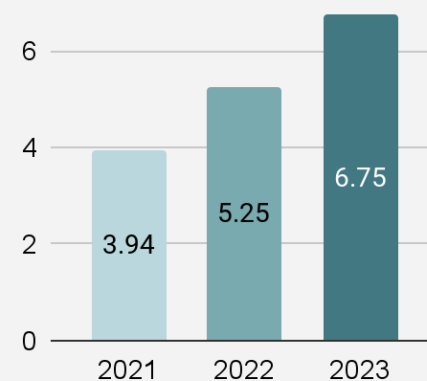
Partial-year data for 2024 indicates a continued upward trend. In January-April 2024, sales value was up 78.8%, unit sales were up 53.5% and sales volume was up 66.7% relative to the same time period in 2023.

Plant-based cheese sales in Italy, 2021-2023

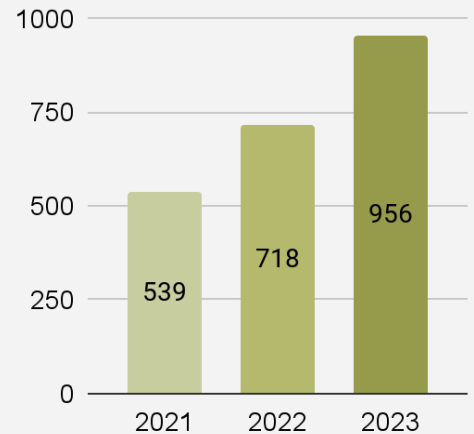
Sales value (€ millions)



Units sold (millions)

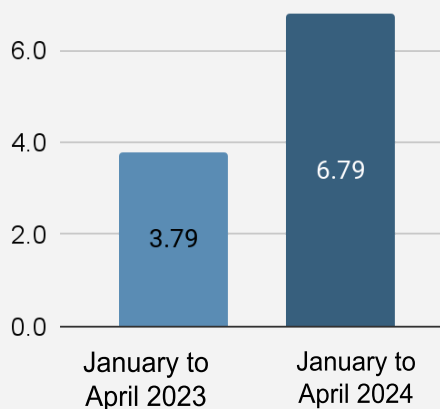


Volume sold (thousands of kg)

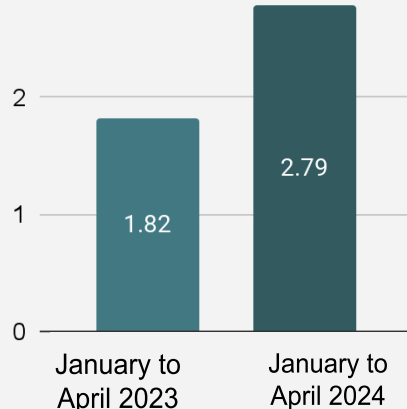


Plant-based cheese sales in Italy, January-April

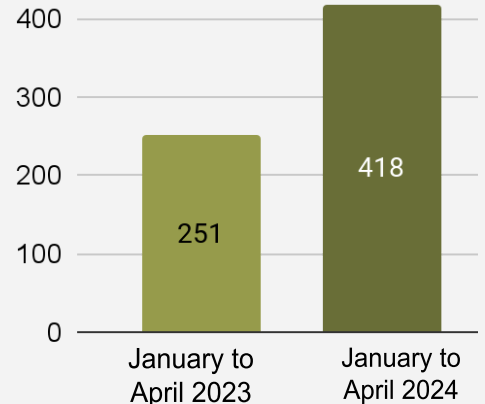
Sales value (€ millions)



Units sold (millions)



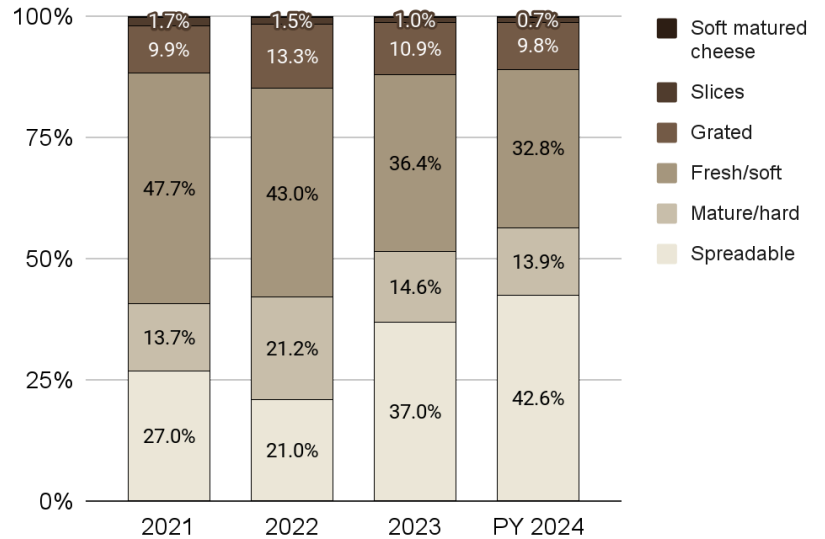
Volume sold (thousands of kg)



Product format breakdown

The leading format for plant-based cheese sales in 2023 was spreadable (37% of sales volume), followed by fresh/soft (36.4%) and mature/hard (14.6%).

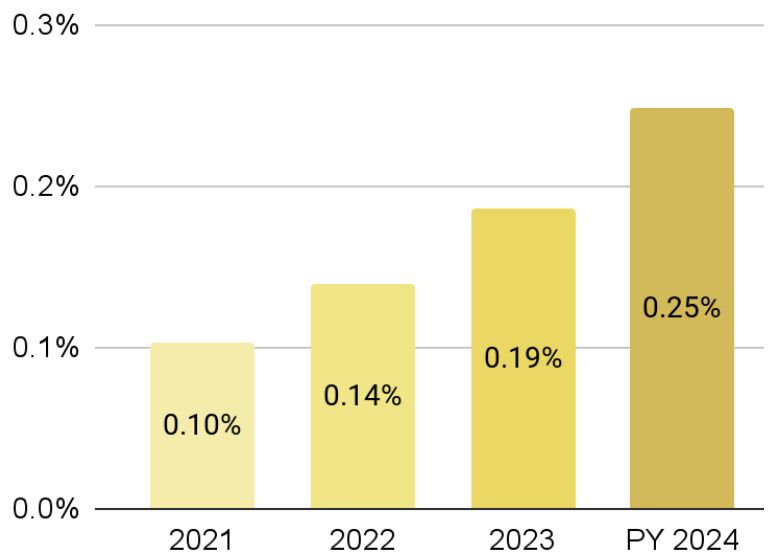
Italy plant-based cheese sales by format, 2021-April 2024 (% volume sales)



Market share

The market share of plant-based cheese has more than doubled from 0.1% of total cheese sales volume in 2021 to 0.25% in early 2024. This shows that plant-based cheese is an emerging category with high growth rates.

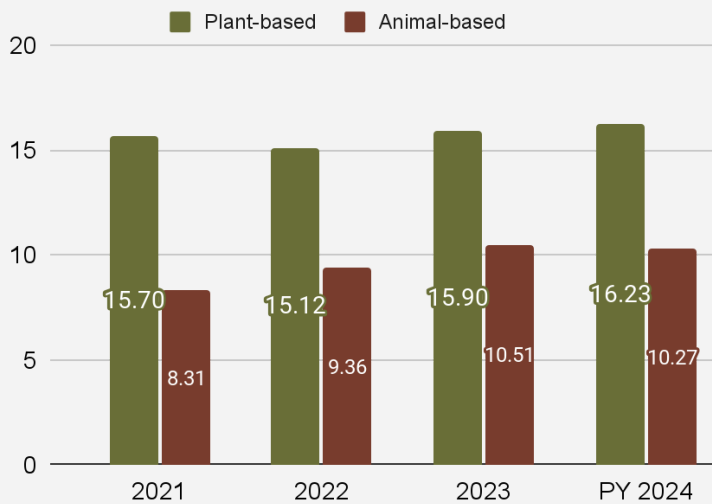
Plant-based cheese: share of Italy's total (plant- and animal-based) cheese market, 2021-April 2024 (% of sales volume)



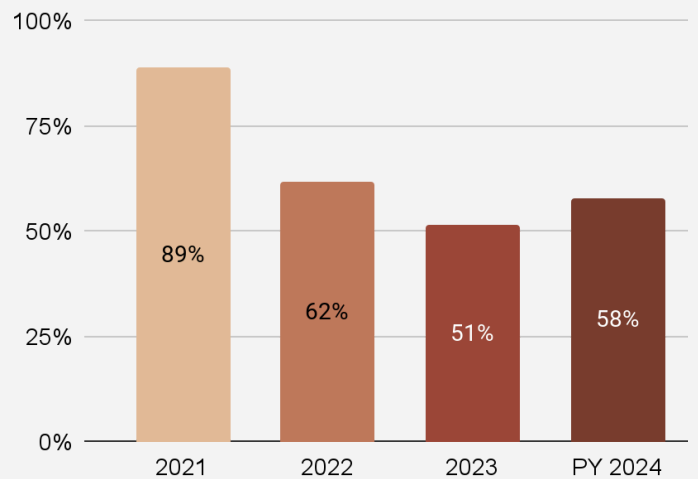
Price trends relative to animal equivalent

In 2021, plant-based cheese was on average 89% more expensive per kg than animal-based cheese. However, by 2023, that gap had fallen to 51%. The gap rose again to 58% in early 2024, driven by an increase in the price of plant-based cheese and a decline in the price of animal-based cheese.

Italy: Average price per kg for plant-based and animal-based cheese, 2021-April 2024 (€/kg)



Italy: price difference for plant-based compared to animal-based cheese, 2021-April 2024 (%)



Plant-based yoghurt

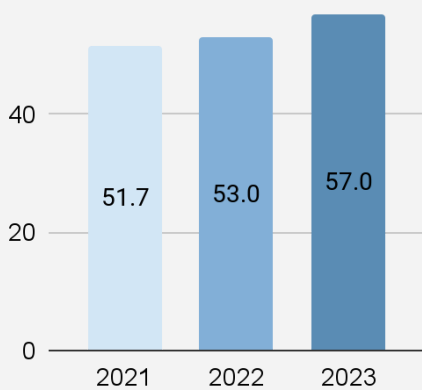
Total market

Between 2021 and 2023, the annual sales value of plant-based yoghurt in Italy increased by 10.2% to €57 million. Over the same time period, unit sales increased by 2% to 39.9 million units while sales volume fell 1.9% to 9.36 million kg, indicating that the average weight per unit has decreased.

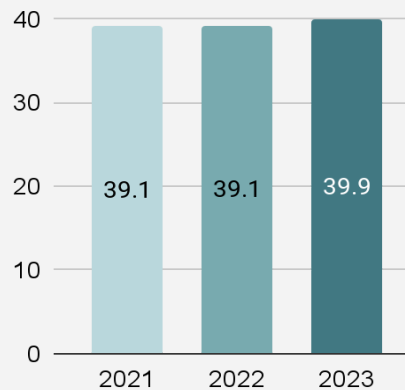
Data for January to April 2024 indicates that value sales, unit sales and sales volume increased by 6.1%, 7.6%, and 3%, respectively, relative to the same period in 2023.

Plant-based yoghurt sales in Italy, 2021-2023

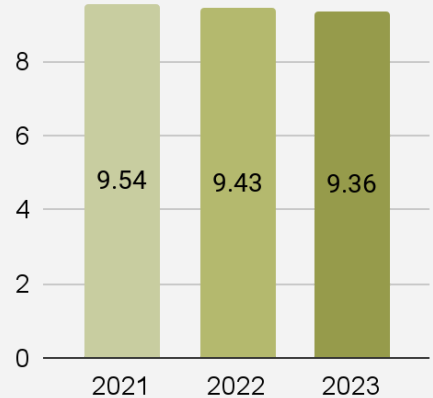
Sales value (€ millions)



Units sold (millions)

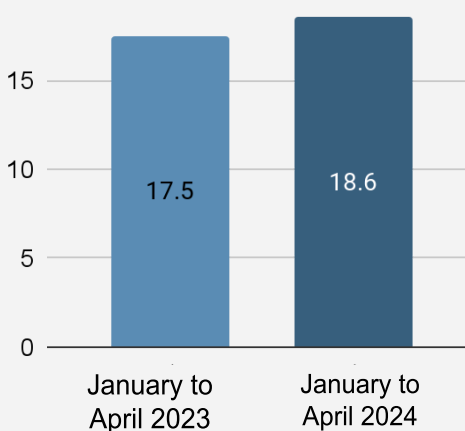


Volume sold (millions of kg)

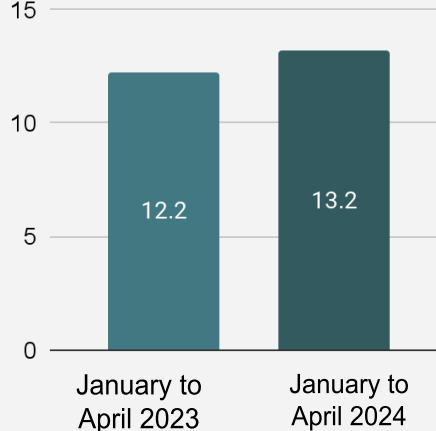


Plant-based yoghurt sales in Italy, January-April

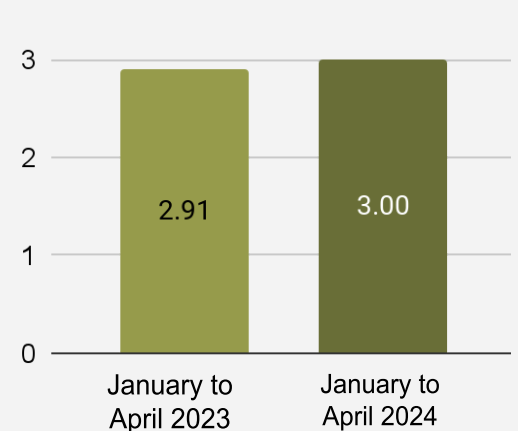
Sales value (€ millions)



Units sold (millions)



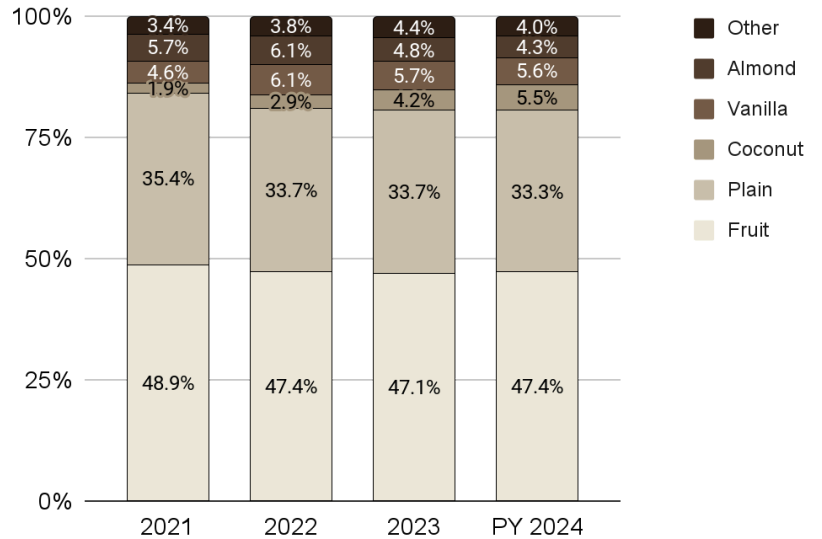
Volume sold (millions of kg)



Product format breakdown

The leading plant-based yoghurt flavours are fruit (47.1% of sales volume) followed by plain (33.7%).

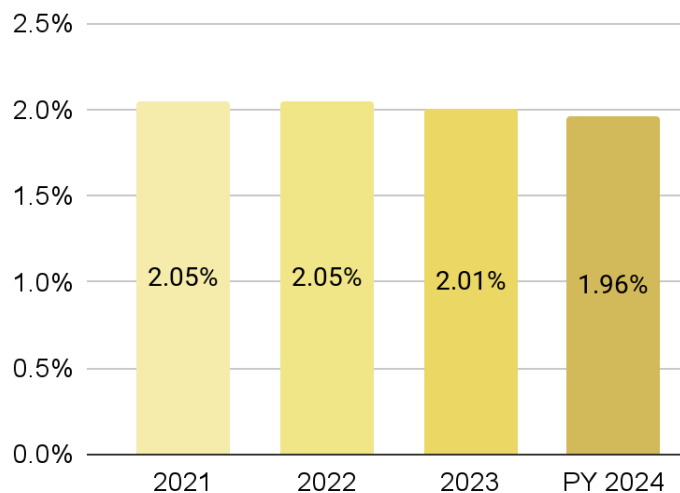
Italy plant-based yoghurt sales by flavour, 2021-April 2024 (% volume sales)



Market share

The market share of plant-based yoghurt has decreased slightly from 2.05% of overall volume in 2021 to 1.96% in early 2024.

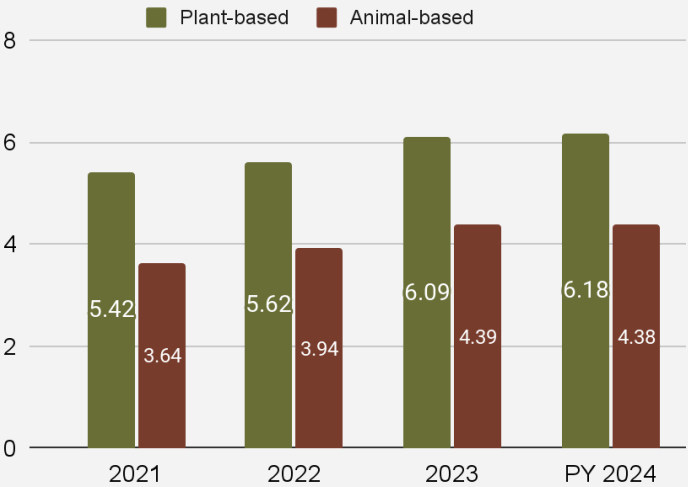
Plant-based yoghurt: share of Italy's total (plant- and animal-based) yoghurt market, 2021-April 2024 (% of sales volume)



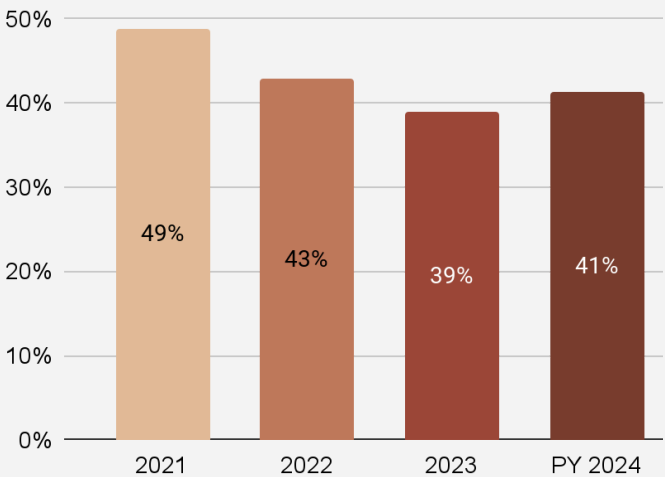
Price trends relative to animal equivalent

Both plant-based and animal-based yoghurt have become more expensive over time. While plant-based yoghurt remains more expensive, the gap has narrowed. In 2021, plant-based yoghurt was on average 49% more expensive per kg than animal-based yoghurt, but that price premium fell to 39% by 2023 before rising again to 41% in early 2024, driven by a slight increase in the price of plant-based yoghurt and a slight decrease in the price of animal-based yoghurt.

Italy: Average price per kg for plant-based and animal-based yoghurt, 2021-April 2024 (€/kg)



Italy: price difference for plant-based yoghurt compared to animal-based yoghurt, 2021-April 2024 (%)



Plant-based ice cream

Total market

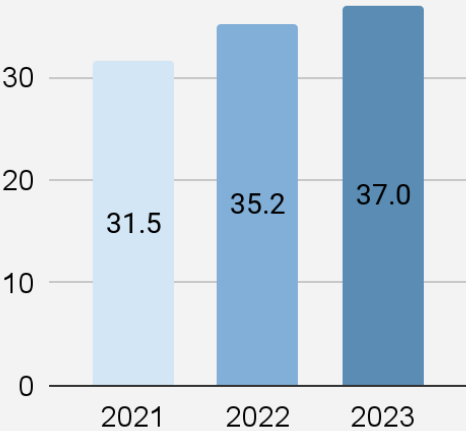
Between 2021 and 2023, the annual sales value of plant-based ice cream in Italy increased by 17.3% to €37 million. Unit sales peaked in 2022 at 10.7 million units before declining to 10.3 million units in 2023. Sales volume also peaked in 2022 at 3.57 million kg before falling to 3.4 million kg in 2023.

Data for January to April 2024 indicates that the category is rebounding, with sales value, unit sales and sales volume increasing 6.8%, 1.4%, and 2.7%, respectively, relative to the same period in 2023.

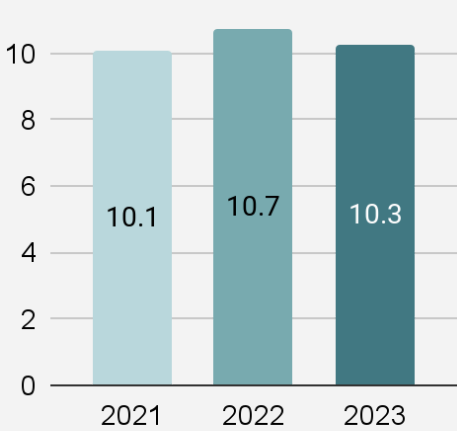
Ice cream is a seasonal product and is mostly consumed during the summer months in Italy. However, it is fair to compare the partial-year data for 2024 to that of the previous year since the same time period (January to April) is presented for both years.

Plant-based ice cream sales in Italy, 2021-2023

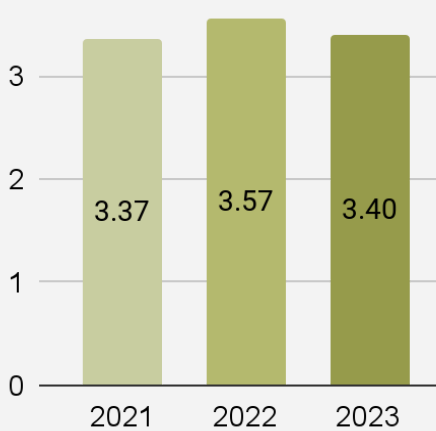
Sales value (€ millions)



Units sold (millions)

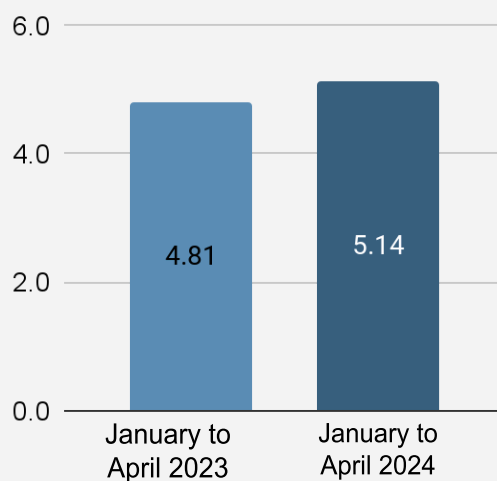


Volume sold (millions of kg)

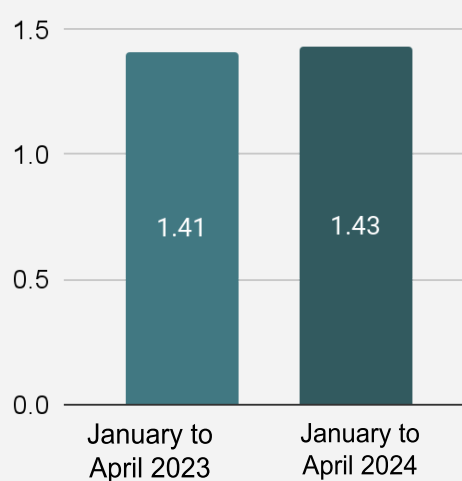


Plant-based ice cream sales in Italy, January-April

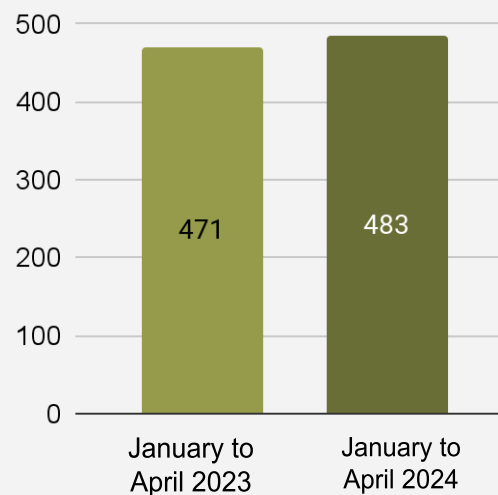
Sales value (€ millions)



Units sold (millions)



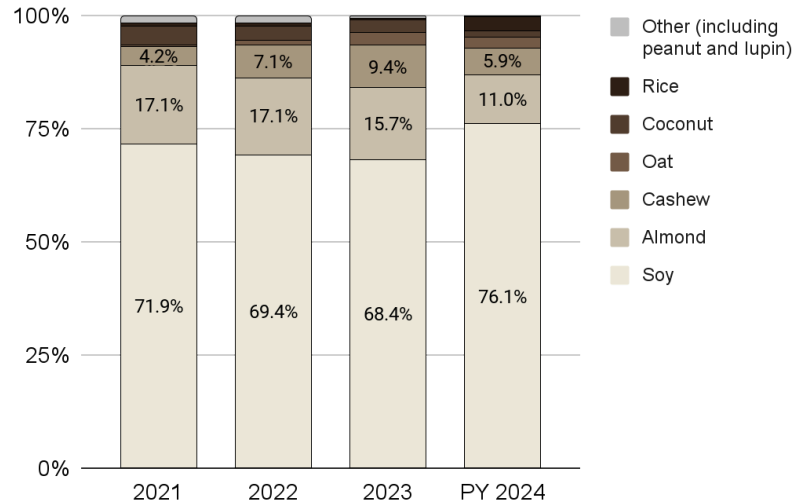
Volume sold (thousands of kg)



Product format breakdown

In 2023, soy was the most popular base ingredient for plant-based ice cream, accounting for 68.4% of sales volume, followed by almond, which accounted for 15.7%. The market share of soy, which declined between 2021 and 2023, jumped again in early 2024.

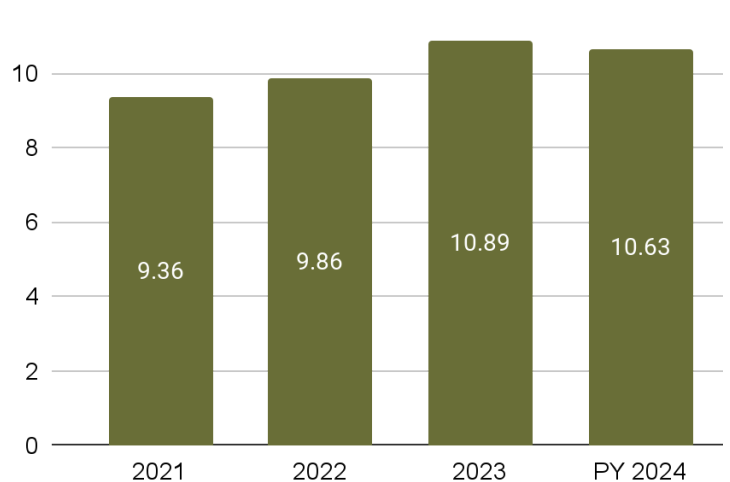
Italy plant-based ice cream sales by ingredient base, 2021-April 2024 (% sales volume)



Price trends

The average price per kg of plant-based ice cream increased by 16.3% between 2021 and 2023 to reach €10.89 per kg, before falling to €10.63 per kg in early 2024.

Italy: Average price per kg for plant-based ice cream, 2021-April 2024 (% of sales value)



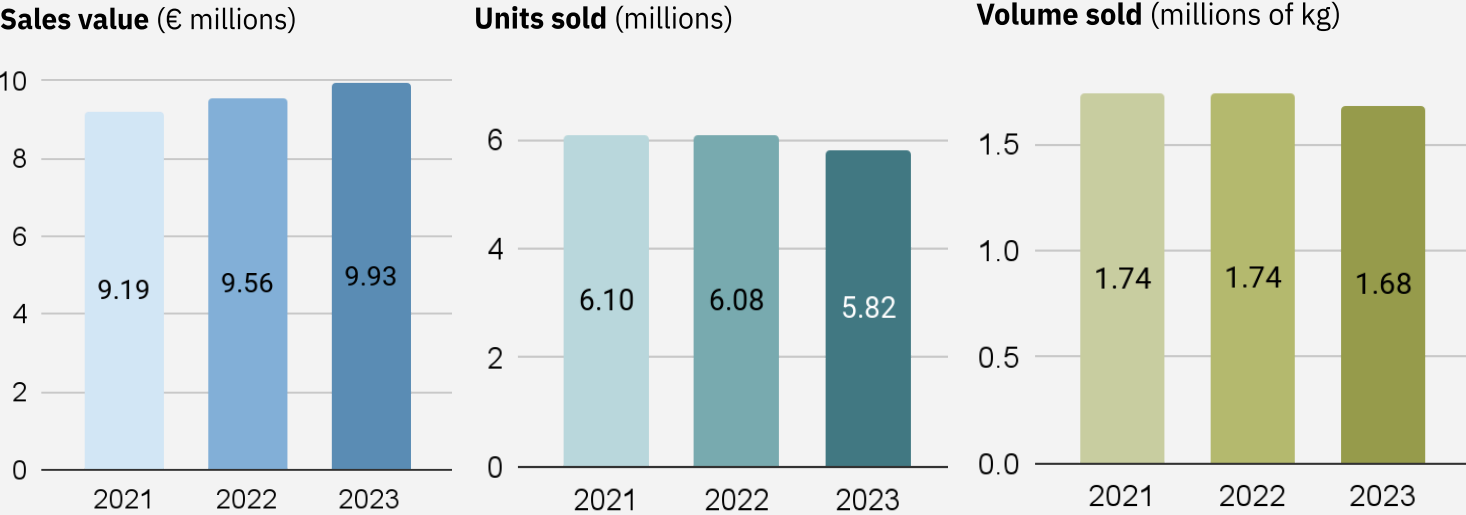
Plant-based dessert

Total market

Between 2021 and 2023, the annual sales value of plant-based desserts (chilled and ambient creamy desserts) in Italy increased by 8% to €9.9 million. Over the same time period, unit sales fell by 4.5% to 5.82 million units, and sales volume declined by 3% to 1.68 million kg.

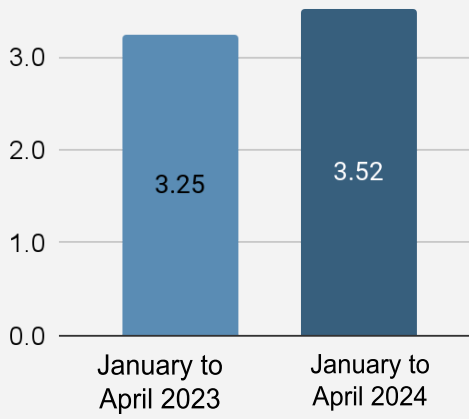
Data for January to April 2024 indicates that sales value and unit sales increased by 8.4% and 9.8% respectively, while sales volume decreased by 1.8%, relative to the same time period in 2023, indicating that the average weight per unit decreased.

Plant-based dessert sales in Italy, 2021-2023

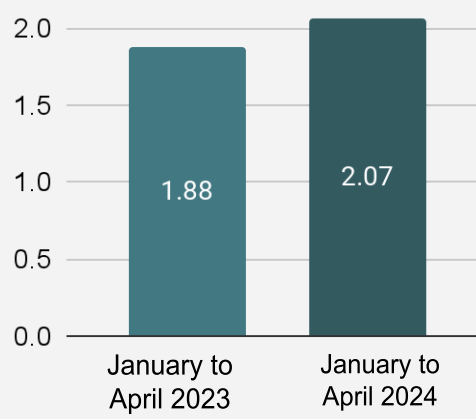


Plant-based dessert sales in Italy, January-April

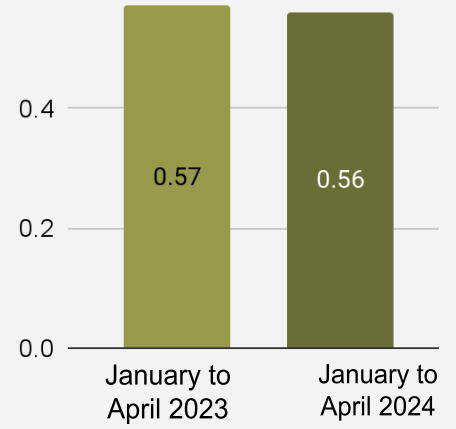
Sales value (€ millions)



Units sold (millions)



Volume sold (millions of kg)

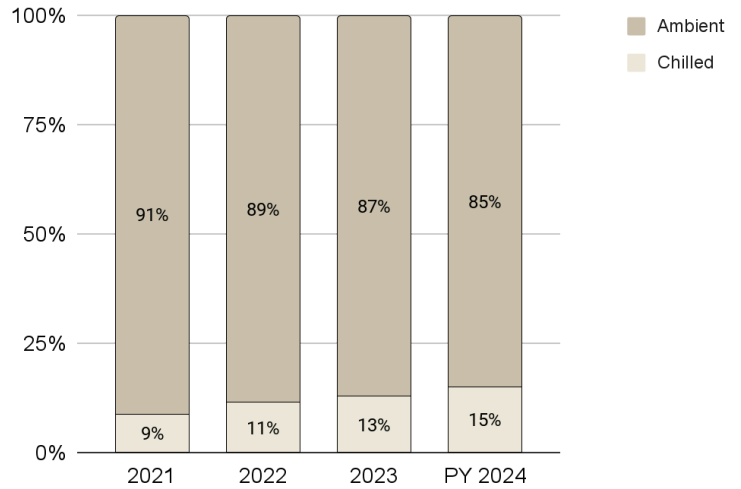


Product format breakdown

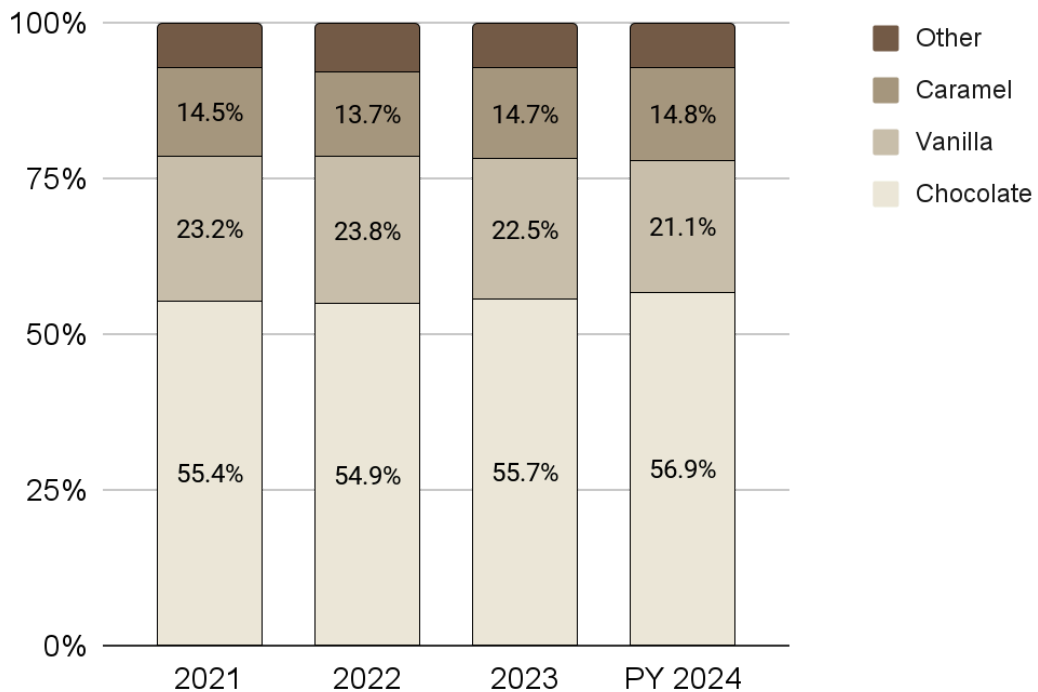
For the products for which data was available, ambient products accounted for the majority of plant-based dessert sales volume in 2023, at 87%. Over time, the percentage of chilled products has increased slowly, from 9% in 2021 to 15% in early 2024.

In 2023, chocolate was the most popular dessert flavour (55.7% of sales volume), followed by vanilla (22.5%) and caramel (14.7%).

Italy plant-based dessert sales by temperature, 2021-April 2024 (% volume sales)



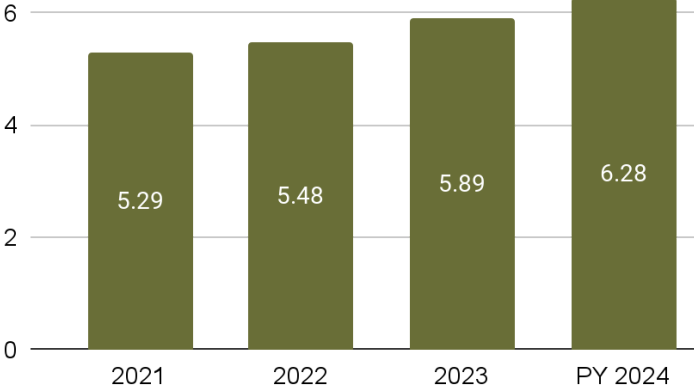
Italy plant-based dessert sales by flavour, 2021-April 2024 (% of sales value)



Price trends

The average price per kg of plant-based dessert increased from €5.29 in 2021 to €6.28 in early 2024, with the steepest increase occurring between 2022 and 2023, in line with high food inflation experienced in Italy during that time.

Italy: Average price per kg for plant-based dessert, 2021-April 2024 (€/kg)



Plant-based cream

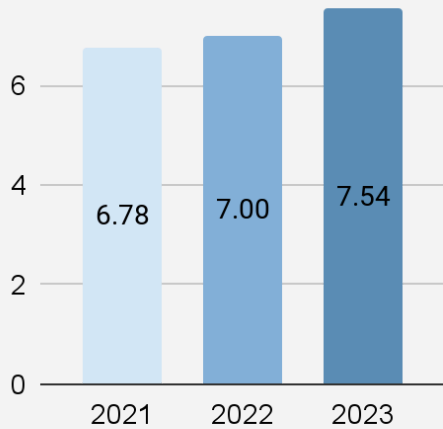
Total market

Between 2021 and 2023, the annual sales value of plant-based cream in Italy increased by 11.2% to €7.54 million³. Over the same time period, unit sales fell by 8.3% to 5.23 million units, and sales volume declined by 11.6% to 1.4 million kg, possibly influenced by the rising price premium of plant-based cream relative to animal-based cream.

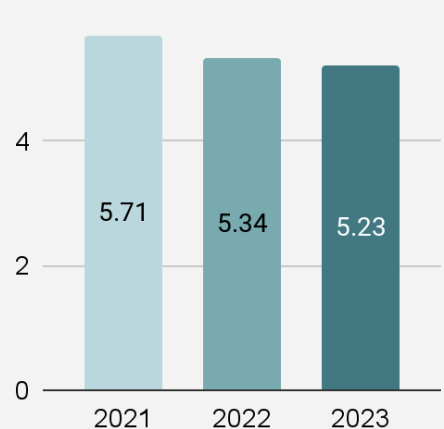
Data for January to April 2024 indicates that sales value, unit sales, and sales volume decreased by 15.8%, 11.8% and 10.1%, respectively, relative to the same time period in 2023.

Plant-based cream sales in Italy, 2021-2023

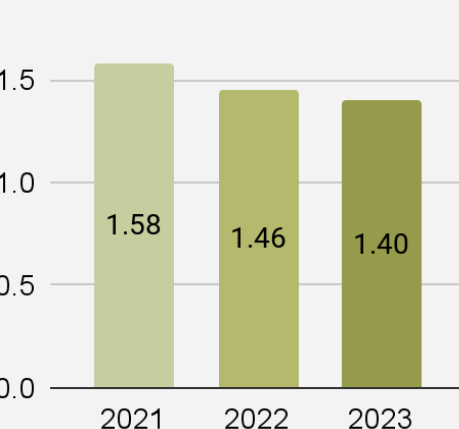
Sales value (€ millions)



Units sold (millions)



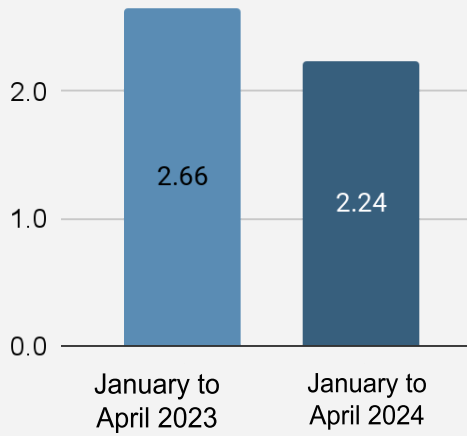
Volume sold (millions of kg)



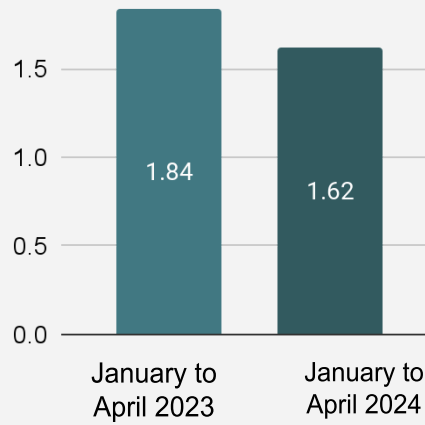
³The sales values in this Circana dataset are significantly lower than the sales of plant-based cream reported in Italy by GFI Europe's previous publication, [Italy plant-based food retail market insights, 2020-2022](#), which was based on data from NielsenIQ. It is likely that different product coverage caused this difference. The plant-based creams included in the Circana dataset are mostly cooking cream, whereas the majority of sales in the NielsenIQ dataset were of whipping cream.

Plant-based cream sales in Italy, January-April

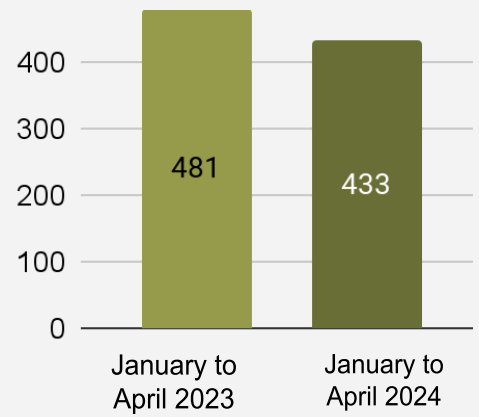
Sales value (€ millions)



Units sold (millions)



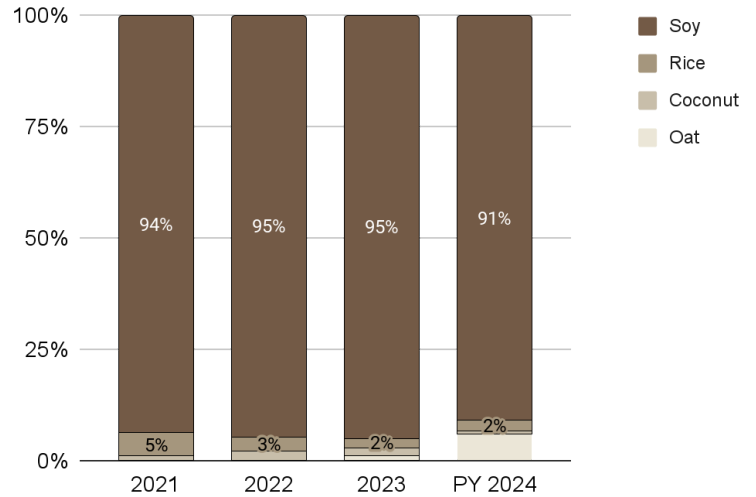
Volume sold (millions of kg)



Product format breakdown

In 2023, the majority of plant-based cream sales were products with a soy base (95% of sales volume). After several years of almost complete market dominance by soy cream, oat cream appears to have gained some market share in early 2024.

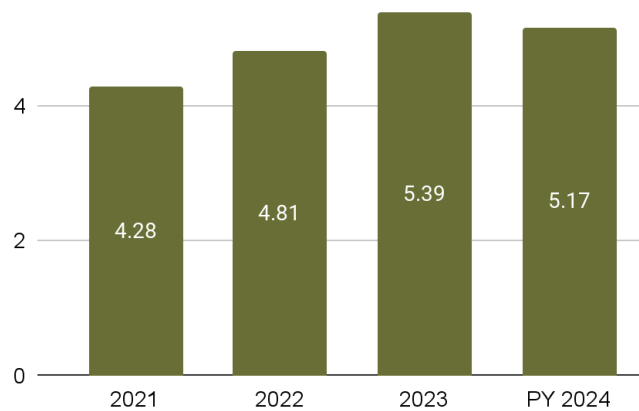
Italy plant-based cream sales by base ingredient, 2021-April 2024 (% of volume sales)



Price trends

The average price per kg of plant-based cream increased by 26% between 2021 and 2023 to €5.39, but fell to €5.17 in early 2024.

Italy: Average price per kg for plant-based cream, 2021-April 2024 (€/kg)



Closing remarks

The Italian plant-based sector is performing well. Despite rising prices for many categories between 2021 and 2023, overall sales volume across seven categories has risen, with growth continuing into 2024.

The continued growth in sales volume for the plant-based meat category reflects the fact that 60% of Italian consumers [want to reduce](#) their meat consumption over the next two years.

Meanwhile, the sharp rise in sales of plant-based cheese in Italy, famed for its many varieties of cheese, is encouraging and shows that consumers are exploring what the plant-based category has to offer.

Consumer uptake of plant-based foods is also likely to be supported by further progress towards price parity. The food industry needs to invest money and effort into making plant-based foods more cost-competitive with their animal-based equivalents.

Helen Breewood,

Research and Resource Manager at the Good Food Institute Europe



“The resilience of the Italian plant-based sector during economic uncertainties is compelling evidence that these foods have become a staple for many Italian consumers, who are increasingly motivated by health and sustainability. To unlock the full potential of this growing sector, it is crucial for policymakers to champion protein diversification and ensure a level playing field, by removing unnecessary and confusing labelling restrictions. By doing so, they can not only support the growth of a more sustainable food system but also foster innovation and provide consumers with a wider array of choices.”

Francesca Gallelli,

Public Affairs Consultant 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 work with scientists, businesses and policymakers to advance options like plant-based and cultivated meat – ensuring they are 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.

Contact

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