

Dairy Products and Alternatives in Italy

August 2024

Table of Contents

Dairy Products and Alternatives in Italy

EXECUTIVE SUMMARY

Dairy products and alternatives in 2024: The big picture

Key trends in 2024

Competitive landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

- Table 1 Sales of Dairy Products and Alternatives by Category: Value 2019-2024
- Table 2 Sales of Dairy Products and Alternatives by Category: % Value Growth 2019-2024
- Table 3 NBO Company Shares of Dairy Products and Alternatives: % Value 2020-2024
- Table 4 LBN Brand Shares of Dairy Products and Alternatives: % Value 2021-2024
- Table 5 Penetration of Private Label by Category: % Value 2019-2024
- Table 6 Distribution of Dairy Products and Alternatives by Format: % Value 2019-2024
- Table 7 Forecast Sales of Dairy Products and Alternatives by Category: Value 2024-2029
- Table 8 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Declining birth rate, high cost of living and growing awareness of health benefits of breastfeeding have negative impact on sales

Players adapt to challenging circumstances by expanding their product lines

Heinz continues as leading player

PROSPECTS AND OPPORTUNITIES

Innovation offers growth opportunities for milk formula, in light of ongoing challenges

Healthier options will be focus of manufacturer innovation

Competition from home-cooked meals

CATEGORY DATA

- Table 9 Sales of Baby Food by Category: Volume 2019-2024
- Table 10 Sales of Baby Food by Category: Value 2019-2024
- Table 11 Sales of Baby Food by Category: % Volume Growth 2019-2024
- Table 12 Sales of Baby Food by Category: % Value Growth 2019-2024
- Table 13 Sales of Growing-Up Milk Formula by Age: % Value 2019-2024
- Table 14 NBO Company Shares of Baby Food: % Value 2020-2024
- Table 15 LBN Brand Shares of Baby Food: % Value 2021-2024
- Table 16 Distribution of Baby Food by Format: % Value 2019-2024
- Table 17 Forecast Sales of Baby Food by Category: Volume 2024-2029
- Table 18 Forecast Sales of Baby Food by Category: Value 2024-2029
- Table 19 Forecast Sales of Baby Food by Category: % Volume Growth 2024-2029
- Table 20 Forecast Sales of Baby Food by Category: % Value Growth 2024-2029

Butter and Spreads in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Another challenging year for butter and spreads

Salted butter gains traction in Italy, along with lactose-free and organic options

Margaine generates marginal volume growth, due to changing consumer perceptions

PROSPECTS AND OPPORTUNITIES

Organic and lactose-free varieties will drive growth in butter

Margine sales will continue to decline, as consumers seek out healthier alternatives

Players increasingly embrace sustainability

CATEGORY DATA

Table 21 - Sales of Butter and Spreads by Category: Volume 2019-2024

Table 22 - Sales of Butter and Spreads by Category: Value 2019-2024

Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2019-2024

Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2019-2024

Table 25 - NBO Company Shares of Butter and Spreads: % Value 2020-2024

Table 26 - LBN Brand Shares of Butter and Spreads: % Value 2021-2024

Table 27 - Distribution of Butter and Spreads by Format: % Value 2019-2024

Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2024-2029

Table 29 - Forecast Sales of Butter and Spreads by Category: Value 2024-2029

Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2024-2029

Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2024-2029

Cheese in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Hard cheese and spreadable cheese lead growth in mature market

Innovation in mozzarella drives growth in soft cheese

High-protein trend continues to shape cheese market

PROSPECTS AND OPPORTUNITIES

Growth opportunities remain in a mature category

Healthier and more sustainable products will come to the fore

Technological advancements could lead to greater productivity

CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2019-2024

Table 33 - Sales of Cheese by Category: Value 2019-2024

Table 34 - Sales of Cheese by Category: % Volume Growth 2019-2024

Table 35 - Sales of Cheese by Category: % Value Growth 2019-2024

Table 36 - Sales of Spreadable Cheese by Type: % Value 2019-2024

Table 37 - Sales of Soft Cheese by Type: % Value 2019-2024

Table 38 - Sales of Hard Cheese by Type: % Value 2019-2024

Table 39 - NBO Company Shares of Cheese: % Value 2020-2024

Table 40 - LBN Brand Shares of Cheese: % Value 2021-2024

Table 41 - Distribution of Cheese by Format: % Value 2019-2024

Table 42 - Forecast Sales of Cheese by Category: Volume 2024-2029

Table 43 - Forecast Sales of Cheese by Category: Value 2024-2029

Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2024-2029

Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2024-2029

KEY DATA FINDINGS

2024 DEVELOPMENTS

Static performance for drinking milk products

Players innovate with new functional and protein-enriched products

Flavoured milk drinks gain traction

PROSPECTS AND OPPORTUNITIES

Waste reduction to inform company choices

Perceived healthier and more digestible milks to exert pressure on cow's milk

Sustainability and animal welfare initiatives provide quality benefits

CATEGORY DATA

Table 46 - Sales of Drinking Milk Products by Category: Volume 2019-2024

Table 47 - Sales of Drinking Milk Products by Category: Value 2019-2024

Table 48 - Sales of Drinking Milk Products by Category: % Volume Growth 2019-2024

Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2019-2024

Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2020-2024

Table 51 - LBN Brand Shares of Drinking Milk Products: % Value 2021-2024

Table 52 - Distribution of Drinking Milk Products by Format: % Value 2019-2024

Table 53 - Forecast Sales of Drinking Milk Products by Category: Volume 2024-2029

Table 54 - Forecast Sales of Drinking Milk Products by Category: Value 2024-2029

Table 55 - Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2024-2029

Table 56 - Forecast Sales of Drinking Milk Products by Category: % Value Growth 2024-2029

Yoghurt and Sour Milk Products in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sour milk products thrive thanks to new innovations

High-protein yoghurts support active lifestyles

Players seek to revitalise drinking yoghurt with new, healthy innovations

PROSPECTS AND OPPORTUNITIES

Positive outlook for kefir and plain yoghurt

Sustainability concerns will shape new product development

Health and wellness trend play pivotal role

CATEGORY DATA

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2019-2024

Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2019-2024

Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2019-2024

Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2019-2024

Table 61 - Sales of Flavoured Yoghurt by Flavour: Rankings 2019-2024

Table 62 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2020-2024

Table 63 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2021-2024

Table 64 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2019-2024

Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2024-2029

Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2024-2029

Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2024-2029

Table 68 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2024-2029

Other Dairy in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Mixed performance for other dairy, with cream and chilled desserts seeing further declines

Fromage frais and quark represent key growth driver

Chilled snacks benefit from launch of new high-protein products

PROSPECTS AND OPPORTUNITIES

Plain fromage frais and quark players will continue to leverage healthy positioning

Healthier innovations will spur chilled snacks, while leader Ferrero will invest in marketing communication to highlight brand visibility Chilled and shelf stable desserts will suffer from continued competition from healthier alternatives

CATEGORY DATA

Table 69 - Sales of Other Dairy by Category: Volume 2019-2024

Table 70 - Sales of Other Dairy by Category: Value 2019-2024

Table 71 - Sales of Other Dairy by Category: % Volume Growth 2019-2024

Table 72 - Sales of Other Dairy by Category: % Value Growth 2019-2024

Table 73 - Sales of Cream by Type: % Value 2019-2024

Table 74 - NBO Company Shares of Other Dairy: % Value 2020-2024

Table 75 - LBN Brand Shares of Other Dairy: % Value 2021-2024

Table 76 - Distribution of Other Dairy by Format: % Value 2019-2024

Table 77 - Forecast Sales of Other Dairy by Category: Volume 2024-2029

Table 78 - Forecast Sales of Other Dairy by Category: Value 2024-2029

Table 79 - Forecast Sales of Other Dairy by Category: % Volume Growth 2024-2029

Table 80 - Forecast Sales of Other Dairy by Category: % Value Growth 2024-2029

Plant-Based Dairy in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Other plant-based milk continues to drive growth

Plant-based yoghurt and cheese tap into the burgeoning healthy eating trend

Soy drinks struggles to take advantage of the shift to healthier drinks

PROSPECTS AND OPPORTUNITIES

Other plant-based milk will continue to grow, with oat milk leading the way

Plant-based cheeses continues to expand

Plant-based yoghurt set to benefit from new product introductions

CATEGORY DATA

Table 81 - Sales of Plant-Based Dairy by Category: Value 2019-2024

Table 82 - Sales of Plant-Based Dairy by Category: % Value Growth 2019-2024

Table 83 - Sales of Other Plant-Based Milk by Type: % Value 2021-2024

Table 84 - NBO Company Shares of Plant-Based Dairy: % Value 2020-2024

Table 85 - LBN Brand Shares of Plant-Based Dairy: % Value 2021-2024

Table 86 - Distribution of Plant-Based Dairy by Format: % Value 2019-2024

Table 87 - Forecast Sales of Plant-Based Dairy by Category: Value 2024-2029

Table 88 - Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2024-2029

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
 trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
 country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/dairy-products-and-alternatives-in-italy/report.