



Processed Meat, Seafood and Alternatives To Meat in Italy

November 2025

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growing preference for chilled products and simple ingredients

INDUSTRY PERFORMANCE

Growing appeal of regional cured meats supports value growth

Dynamism in chilled meat and seafood substitutes

WHAT'S NEXT?

Varied opportunities for growth in mature category

Rising health concerns related to eating processed meats poses a threat

Dynamic developments in packaged meat and seafood

COMPETITIVE LANDSCAPE

Fragmented landscape led by Coop Italia scarl

Kioene SpA enjoys strong growth as leader in plant-based segment

CHANNELS

Supermarkets tempt consumers with diverse range of brands and private label

Retail e-commerce helps to support regional brands

CATEGORY DATA

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Staple Foods in Italy - Industry Overview

EXECUTIVE SUMMARY

Staple foods evolves to keep pace with consumer demands

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Staple foods enjoys steady growth as economic conditions stabilise

Consumers are combining sustainable choices with health and ethical motivations

WHAT'S NEXT?

Stable outlook for staple foods

Rising interest in Asian cuisine will underpin expansion of noodles

Growing demand for meat and seafood alternatives

COMPETITIVE LANDSCAPE

Artisanal has a significant share due to prominence of unpackaged leavened bread

Retailers have a solid presence in fragmented landscape

CHANNELS

Consumers are increasingly reliant on large retailers

Food specialists are a fundamental channel in staple foods

Retail e-commerce makes strong inroads in staple foods

MARKET DATA

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