



Fresh Food in Italy

January 2026

Table of Contents

Fresh Food in Italy

EXECUTIVE SUMMARY

Health-led demand supports fresh food despite inflation

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Flat volume growth recorded with shift towards high-protein, nutritious and sustainable options

Cost-conscious consumers continue to trade down amid rising threat from processed alternatives and climate volatility

WHAT'S NEXT?

Health focus will see nuts, eggs and sweet potatoes drive overall growth amid persistent climate-related challenges

Wellness concerns favour fresh food despite packaged threat

CHANNELS

Italians maintain habit of shopping at neighbourhood stores

Discounters channel benefits from favourable pricing and increased focus on sustainability

MARKET DATA

Table 1 - Total Sales of Fresh Food by Category: Total Volume 2020-2025

Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2020-2025

Table 3 - Retail Sales of Fresh Food by Category: Volume 2020-2025

Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2020-2025

Table 5 - Retail Sales of Fresh Food by Category: Value 2020-2025

Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2020-2025

Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2020-2025

Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2020-2025

Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2025-2030

Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2025-2030

Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2025-2030

Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2025-2030

Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2025-2030

Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Eggs in Italy

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordability anchors demand as welfare standards rise

INDUSTRY PERFORMANCE

Eggs continues to benefit from staple nature and affordability

Animal welfare concerns drive development

WHAT'S NEXT?

Traceability and clean labelling to come to the fore

Possible obstacles to stronger growth include rising costs though marketing and innovation should bolster sales

Summary 2 - Major Processors of Eggs 2025

CATEGORY DATA

- Table 15 - Total Sales of Eggs: Total Volume 2020-2025
- Table 16 - Total Sales of Eggs: % Total Volume Growth 2020-2025
- Table 17 - Retail Sales of Eggs: Volume 2020-2025
- Table 18 - Retail Sales of Eggs: % Volume Growth 2020-2025
- Table 19 - Retail Sales of Eggs: Value 2020-2025
- Table 20 - Retail Sales of Eggs: % Value Growth 2020-2025
- Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2020-2025
- Table 22 - Forecast Total Sales of Eggs: Total Volume 2025-2030
- Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2025-2030
- Table 24 - Forecast Retail Sales of Eggs: Volume 2025-2030
- Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2025-2030
- Table 26 - Forecast Retail Sales of Eggs: Value 2025-2030
- Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Fish and Seafood in Italy

KEY DATA FINDINGS

2025 DEVELOPMENTS

Price stability and variety lift fish and seafood demand

INDUSTRY PERFORMANCE

Fish rises through healthy profile in 2025
Sustainable sourcing as key concern

WHAT'S NEXT?

Further growth forecast for fresh fish and seafood despite competitive challenge from processed variants
Invasion of blue crabs threatens local production
Summary 3 - Major Processors of Fish and Seafood 2025

CATEGORY DATA

- Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2020-2025
- Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2020-2025
- Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2020-2025
- Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2020-2025
- Table 32 - Retail Sales of Fish and Seafood by Category: Value 2020-2025
- Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2020-2025
- Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2020-2025
- Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2025-2030
- Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2025-2030
- Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2025-2030
- Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2025-2030
- Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2025-2030
- Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

Fruits in Italy

KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising costs and weather shocks keep fruit growth muted

INDUSTRY PERFORMANCE

Fruits sees only marginal volume growth thanks to rising costs

Cherries falls as prices surge, while bananas benefits from convenience and affordability

WHAT'S NEXT?

Health trends will support sales in fruits despite persistent challenges, as players invest more in sustainability

Italians show increased interested in novel and exotic fruits

Summary 4 - Major Processors of Fruits 2025

CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2020-2025

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2020-2025

Table 43 - Retail Sales of Fruits by Category: Volume 2020-2025

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2020-2025

Table 45 - Retail Sales of Fruits by Category: Value 2020-2025

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2020-2025

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2020-2025

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2025-2030

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2025-2030

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2025-2030

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2025-2030

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2025-2030

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Meat in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordability and ethics reshape meat demand in 2025

INDUSTRY PERFORMANCE

Poultry drives growth as red meat falls in 2025

Sustainability and animal welfare undermine appeal of red meat

WHAT'S NEXT?

Poultry will continue to drive growth amid persistent shift away from red meat

Premiumisation trend to be pushed by demand for organic and sustainable options

Summary 5 - Major Processors of Meat 2025

CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2020-2025

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2020-2025

Table 56 - Retail Sales of Meat by Category: Volume 2020-2025

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2020-2025

Table 58 - Retail Sales of Meat by Category: Value 2020-2025

Table 59 - Retail Sales of Meat by Category: % Value Growth 2020-2025

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2020-2025

Table 61 - Forecast Sales of Meat by Category: Total Volume 2025-2030

Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2025-2030

Table 63 - Forecast Retail Sales of Meat by Category: Volume 2025-2030

Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2025-2030

Table 65 - Forecast Retail Sales of Meat by Category: Value 2025-2030

Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Nuts in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Supply inflation tests pricing, but demand holds up

INDUSTRY PERFORMANCE

Walnuts drives solid volume growth for nuts in 2025

Nuts see increased uptake through foodservice though domestic producers face challenges

WHAT'S NEXT?

Nuts will continue to benefit from health positioning

Traceability and authenticity to become increasingly important

Summary 6 - Major Processors of Nuts 2025

CATEGORY DATA

Table 67 - Total Sales of Nuts by Category: Total Volume 2020-2025

Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2020-2025

Table 69 - Retail Sales of Nuts by Category: Volume 2020-2025

Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2020-2025

Table 71 - Retail Sales of Nuts by Category: Value 2020-2025

Table 72 - Retail Sales of Nuts by Category: % Value Growth 2020-2025

Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2020-2025

Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2025-2030

Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2025-2030

Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2025-2030

Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2025-2030

Table 78 - Forecast Retail Sales of Nuts by Category: Value 2025-2030

Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Pulses in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Affordability and versatility strengthen pulses in 2025

INDUSTRY PERFORMANCE

Pulses benefits from low cost and high protein

Updated image of fresh pulses lures younger Italians amid rising competitive threat from packaged formats

WHAT'S NEXT?

Rising interest in ethnic cuisine and versatile nature of pulses ensure further growth

Sustainable sourcing to become increasingly important

Summary 7 - Major Processors of Pulses 2025

CATEGORY DATA

Table 80 - Total Sales of Pulses by Category: Total Volume 2020-2025

Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2020-2025

Table 82 - Retail Sales of Pulses by Category: Volume 2020-2025

Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2020-2025

Table 84 - Retail Sales of Pulses by Category: Value 2020-2025

Table 85 - Retail Sales of Pulses by Category: % Value Growth 2020-2025

Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2020-2025

Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2025-2030

Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2025-2030

Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2025-2030

Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2025-2030

Table 91 - Forecast Retail Sales of Pulses by Category: Value 2025-2030

Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Starchy Roots in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sweet potatoes lift starchy roots despite supply headwinds

INDUSTRY PERFORMANCE

Sweet potatoes drive growth, outpacing broader category

Affordability of potatoes protects sales amid climate volatility and supply chain problems

WHAT'S NEXT?

Central role of potatoes ensures future growth of starchy roots in Italy

Rising demand for organic, sustainable and new varieties of potatoes

Summary 8 - Major Processors of Starchy Roots 2025

CATEGORY DATA

Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2020-2025

Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2020-2025

Table 95 - Retail Sales of Starchy Roots by Category: Volume 2020-2025

Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2020-2025

Table 97 - Retail Sales of Starchy Roots by Category: Value 2020-2025

Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2020-2025

Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2020-2025

Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2025-2030

Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2025-2030

Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2025-2030

Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2025-2030

Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2025-2030

Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Sugar and Sweeteners in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Sweeteners drive marginal rebound amid structural headwinds

INDUSTRY PERFORMANCE

Sugar and sweeteners turns in positive performance in 2025

Health and sustainability remain key concerns for Italian consumers

WHAT'S NEXT?

Sugar and sweeteners faces further struggles in forecast period

Sugar tax set to undermine category progress

Summary 9 - Major Processors of Sugar and Sweeteners 2025

CATEGORY DATA

Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2020-2025

Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2020-2025

Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2020-2025

Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2020-2025

Table 110 - Retail Sales of Sugar and Sweeteners: Value 2020-2025

Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2020-2025

Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2020-2025

Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2025-2030

Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2025-2030

Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2025-2030

Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2025-2030

Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2025-2030

Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

[Vegetables in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Climate volatility keeps growth uneven

INDUSTRY PERFORMANCE

Volume sales rise but category faces climate-related challenges

Provenance becomes more important as consumers make more responsible choices

WHAT'S NEXT?

Growth in vegetables remains subject to climatic conditions but supported by increased health awareness

Rising popularity of frozen vegetables hinders growth protentional of fresh variants, though new vegetables could add fresh impetus

Summary 10 - Major Processors of Vegetables 2025

CATEGORY DATA

Table 119 - Total Sales of Vegetables by Category: Total Volume 2020-2025

Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2020-2025

Table 121 - Retail Sales of Vegetables by Category: Volume 2020-2025

Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2020-2025

Table 123 - Retail Sales of Vegetables by Category: Value 2020-2025

Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2020-2025

Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2020-2025

Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2025-2030

Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2025-2030

Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2025-2030

Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2025-2030

Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2025-2030

Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

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/fresh-food-in-italy/report.