Evolving appetites: An in-depth look at attitudes towards plant-based eating

Italy

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Top 10 key takeaways

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59% of Italian meat consumers say that they have reduced their annual meat intake.

23% of Italian respondents identify as flexitarians, 5% as vegetarian, 3% as pescatarian, and 1% as vegan.

The primary motives for reducing meat or dairy consumption are **health (54%), concerns about antibiotics (17%), and the environment (16%)**.

Italy respondents say that they intend to substitute animal-based foods with legumes (57%), legume-based foods (43%), plant-based meat alternatives (39%), and plant-based dairy alternatives (41%).

Taste (35%) and lack of information about plant-based alternatives (27%) remain the key barriers to choosing plant-based alternatives.

67% of consumers in Italy intend on purchasing plant-based alternatives from **supermarkets**, while 34% plan to buy them from **discounters**.

The most-requested plant-based alternatives are **plant-based sweets and snacks** (e.g. chocolates, chips, cookies) (34%), followed by **plant-based baked goods** (33%).

57% of Italian respondents say that they **trust plant-based alternatives more than they did three years ago**.

Italian respondents trust plant-based alternatives mostly due to their **safety (66%), accurate labeling (64%), and reliability (63%)**.

71% would like to see **enhanced transparency standards in product certifications**, while 68% agree with the removal of taxes on foods that have a reduced environmental impact.

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Introduction

With the third-largest economy in the European Union[a] and one of the highest levels of awareness about the importance of plant-centric diets[b], **Italy is one of the largest potential drivers of market engagement, particularly in novel sectors such as alternative proteins.** However, encouraging and accelerating the shift towards plant-based eating is not without its challenges. In November 2023, the Italian Senate approved a law banning the sale of cultivated meat as well as the use of meat-like descriptors for plant-based products," citing health as the predominant driver of this legislation.[c] Moreover, the deep-seated connection between Italians and their culinary traditions, a cornerstone of popular culture, underscores the importance of authenticity. This reverence for traditional food practices paired with potential resistance to new foods and processes may present significant barriers to the production and acceptance of food innovation.

In response to market challenges, Italian companies are eyeing international expansion to capitalise on their high-quality, certified, 100%-Italian raw materials, focusing on sustainability and minimal ingredients[d]. Yet, our findings suggest Italy's domestic market is poised for change, evidenced by a notable shift away from meat and dairy, largely motivated by health considerations, and by the significance of legumes in Italian's dietary lifestyles. Moreover, The Good Food Institute identifies Italy as Europe's third-largest market for plant-based foods, with sales surging 21% from 2020 to 2022 to exceed 600 million Euros.[e] **This growth signals a significant opportunity to bolster the plant-based movement in Italy with strategic institutional support.**

This report details Italy's capacity to lead in the plant-based sector, thanks to rising consumer interest, a vibrant ecosystem of producers, influencers, and suppliers, and the potential for enhanced policies supporting plant-centric lifestyles. This report offers critical insights and strategies for food businesses, government agencies, and NGOs to promote and sustain plant-centric dietary choices among Italians.

a) Rao, Pallavi (2023, February 1) *These are the EU countries with the largest economies.*World Economic Forum.
b) How familiar are you with the following products? | Multiple choice.
c) Bambridge-Sutton, A. (2023, November 21). *Italian gov't bans cultivated meat, restricts plant-based meat labelling.* foodnavigator.com.
d) Saiolfi. (2022, September 5). *Italian plant-based foods go mainstream.* Italianfood.net.
e) GFI Europe (2023, November 16) *Italy ban on cultivated meat cuts itself off from innovation and Blocks Sustainable Development.*

Survey methodology
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Survey

- Conducted online by Innova Market Insights.
- 20-minute-long questionnaire.
- Conducted in June 2023, as a follow-up to the previous survey conducted in June 2021, the results of which are used in this report in order to compare changes in behaviours and attitudes over the last two years.
- Countries covered by the research: Austria, Germany, Spain, France, Italy, the United Kingdom, Denmark, Poland, Romania, Italy.

Participants

- 750, all over the age of 18.
- 20% of participants in each age group:
  - 18-24 years old
  - 25-34 years old
  - 35-44 years old
  - 45-54 years old
  - 55-70 years old
- 49,7% men, 50% women and 0,3% other.
- Only consumers who are responsible for household grocery shopping participated.

4 key changes compared to 2021

Italy

Compared to the results of the 2021 report,[1] four key developments are evident in Italy:

No 1. In 2021, 50% of consumers said that they had decreased their annual meat intake.[1] In 2023, the figure increased to 59%.

No 2. In 2021, 34% of respondents said that they followed a flexitarian, pescatarian, vegetarian, or vegan diet.[2] In 2023, this dropped to 31%, driven by a decrease in flexitarians (-2%)

No 3. Although taste and health remain key drivers of plant-based alternatives,[3] a shift in consumer priorities has occurred since the last report, with health now the leading factor, at 49%, followed by taste, at 39%, freshness, at 32%, and texture, at 31%. (In 2021, taste led, at 37% followed by health, at 34%).[3]

No 4. 57% of Italian respondents said that they trust plant-based alternatives more than they did three years earlier.

1) 'Meat (e.g. beef, pork, chicken).
2) Flexitarian – I sometimes eat meat, but I am trying to reduce my meat consumption and often choose plant-based foods instead.
3) Products made solely from plant-based ingredients and are developed to resemble conventional animal-based foods such as meat or dairy. (Examples include soya burgers and soya milk).

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Consumer attitudes & behaviours towards plant-based foods

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Meat consumption: behaviours and attitudes

Meat consumers in Italy have shown notable shifts in their meat-consumption habits,[5] with **59% saying that they reduced their meat intake in the past year**. Of these respondents, 17% decreased their meat consumption by 50% or more, while 42% made slight reductions. On the other hand, 33% report no change in their meat consumption, while 9% say that have increased their meat intake. Beef and pork have seen the most substantial reductions, accounting for 34% and 26%, respectively. **Changes in the consumption levels of other animal-based products such as milk, cheese, eggs, and yoghurt, remain marginal**, with less than 7% of meat or dairy consumers reporting notable changes.

The most important motivation for eating less meat and dairy is health,[6] with 54% of respondents citing it as a key reason. Additionally, 27% of respondents cite animal welfare as a key driver of their reduced meat consumption, followed by concerns over antibiotics at 17%. Hence, health benefits are paramount in influencing changes in the behaviour of Italian consumers. Compared to other countries, a larger proportion of Italian consumers are reducing their meat consumption (59% vs 51% average). When asked about their motivations, Italians cited *health* as the key reason (54% vs. 47% average), which further supports the notion that Italians are more likely to change their behaviours because of health, compared to any other country.

Dietary lifestyles in Italy

Despite Italian consumers reporting a reduction in their annual meat intake, the number of individuals identifying as flexitarians remains low and has declined since 2021. Presently, 69% of respondents identify as omnivores (a 2% increase from 2021), while 23% identify as flexitarian (a 2% decrease from 2021). Additionally, 3% identify as pescatarian, 5% as vegetarian, and 1% as vegan. These statistics highlight an opportunity to promote the health benefits of adopting plant-based lifestyles.

When asked about the duration of their dietary lifestyles,[7] **more than half of Italian consumers say that they have been following a flexitarian, pescatarian, vegetarian, or vegan diet for more than two years**. 39% of flexitarians have been following their diet for more than two years, while 68% of pescatarians, 59% of vegetarians, and 22% of vegans have been following their diets for the same period.

	2021	2023	% change
Omnivore	67	69	+2
Flexitarian	25	23	-2
Pescatarian	3	3	0
Vegetarian	5	5	0
Vegan	1	1	0

Q3: Which category best describes your current dietary lifestyle? (IT n=750)

5) Compared to a year ago, how much meat (e.g. beef, pork, chicken) are you eating now? | Single choice.
6) Which of the following reasons best describe why you have chosen to decrease your consumption of meat or dairy products? | Multiple choice.
7) How long have you been following your current dietary lifestyle? | Single choice.

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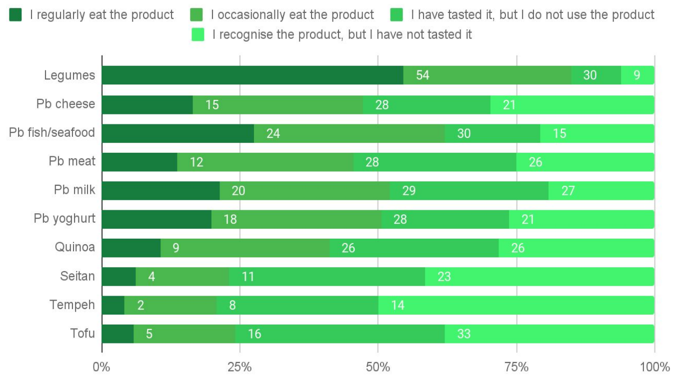
Familiarity of plant-based foods*



Q6 How familiar are you with the following food products? (IT n=750)

Legumes rank as the most-familiar plant-based food in Italy, with 84% of respondents reporting at least occasional consumption, followed by plant-based fish (54%), milk (49%), and yoghurt (46%). Of all countries surveyed, Italy ranks as the second highest consumer of legumes.

When asked about their likely future behaviours, **57% of Italian respondents said that they are open to substituting animal-based foods with legumes**, 43% with legume-based foods, and 41% with plant-based dairy products.

Market opportunities for plant-based alternatives

Top 5 drivers when purchasing plant-based alternatives[8]

1. Health (49%)
2. Taste (39%)
3. Freshness (31%2)
4. Texture (31%)
5. Absence of additives and/or artificial ingredients (29%)

Top 5 barriers when purchasing plant-based alternatives[9]

1. Too expensive (35%)
2. Need more information (27%)
3. Not tasty enough (26%)
4. Lack of options (25%)
5. Worried about health (21%)

Compared to the 2021 results, **health, taste, and freshness remain the three most important drivers** when purchasing plant-based alternatives. The absence of additives and/or artificial ingredients are additionally key drivers of purchase. However, since 2021, affordability no longer ranks as a top driver of purchase, while texture has gained in significance.

When it comes to purchase location,[10] 67% of consumers are most likely to buy plant-based alternatives at supermarkets, followed by discounters (34%). In terms of consumption location,[10] **72% of respondents are most likely to consume such products at home**, 18% at conventional restaurants, 15% at plant-based restaurants, 13% via online orders or takeaways, and 7% at school or work canteens.

In terms of the variety of plant-based products available,[11] **34% would most like to see more sweets and snacks**, followed by baked goods (33%) and meat (32%).

8) What are the most important factors when choosing plant-based food alternatives? It is important to me that the plant-based food alternatives I ch
9) Which of the following do you encounter as barriers when choosing plant-based food alternatives?| Multiple choice (max 5).
10) Where are you likely to purchase/consume plant-based food alternatives most frequently in the future? |Multiple choice.
11) What kind of plant-based food alternative(s) do you wish you could buy more often in the supermarket or at points of consumption (e.g. restaurants, cafes, etc.)? |Multiple choice.
*Pb= plant-based // Legumes (e.g. lentils, chickpeas) Pb cheese (e.g. sliced/grated cheese) Pb fish/seafood (e.g. fish sticks/tuna) Pb meat (e.g. burgers/sausages) Pb milk (e.g. soy/oat milk Pb yoghurt (e.g. soy/oat yoghurt)

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Consumer attitudes & behaviours towards plant-based foods

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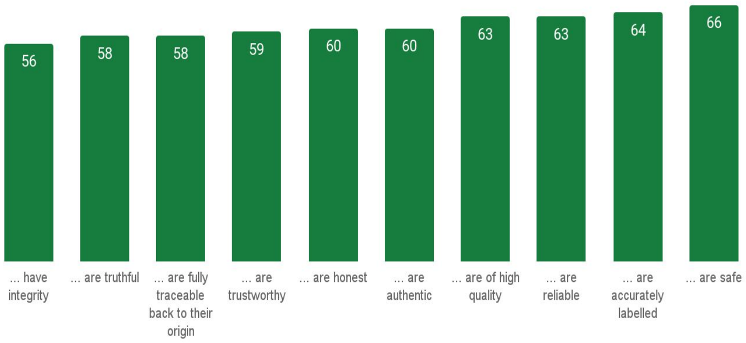
Trust levels towards alternative proteins

57% of Italian consumers trust plant-based alternatives more than they did three years ago, the highest percentage of consumers among all the countries surveyed. 17% reported a significant increase in trust, 41% a slight increase in trust, 31% no change, 8% varying degrees of decreased trust, and 3% unsure. Of the protein sources listed[13], Italian consumers trust plant-based protein the most (53%) and insect-based protein the least (7%), aligning with the results of the other countries surveyed. **Overall, current trust levels indicate an openness toward plant-based alternatives and their potential normalisation.**



I trust that plant-based food alternatives... |Single choice | Total agreement level (Strongly agree + Agree + Somewhat Agree) (IT n=750)

Plant-based proteins are most trusted for their safety (66%), accurate labeling (64%), high quality (63%), and reliability (63%). Despite low awareness and lower trust toward integrity and ingredient traceability, the increases in overall trust toward plant-based alternatives paint a bright future for plant-based products.

The media and online influencers

In terms of the perceived quality of information that Italian respondents receive in mainstream online media, there are significant opportunities for leverage. Italian respondents exhibit relatively high trust in health- and nutrition-society websites as well as government websites, signaling a key point for potential engagement. Social media also presents a key opportunity, with more than one in four Italian respondents reporting frequent usage of social media when reading opinions about food products (26%), searching for information about food when dining out or traveling (25% and 27%), sharing photos of food, and receiving updates on discounts and promotions (30%). [14]

Ranking of online media, by trustworthiness[15]

1. Health and/or nutrition-society websites
2. Search engines (e.g. Google)
3. Government websites
4. NGO websites
5. Food company websites
6. Online collaborative projects (e.g. Wikipedia)
7. Online video platforms (e.g. YouTube)
8. News platforms
9. Online forums (e.g. Reddit)
10. Social Media platforms

13) Which of the following alternative proteins do you trust the most? Rank them 1 (trust the most) to 5 (trust the least): Algae-based, cultivated, fur
14) When thinking about your overall knowledge and experience with plant-based food alternatives, has your current trust increased or decreased in comparison to three years ago? |Single choice.
15) In general, how much do you trust information about plant-based food products from...| Single choice.
16) Please indicate how much you disagree or agree with each of the following statements concerning social media and food attitudes.| Single choice.

Consumer attitudes & behaviours towards plant-based foods

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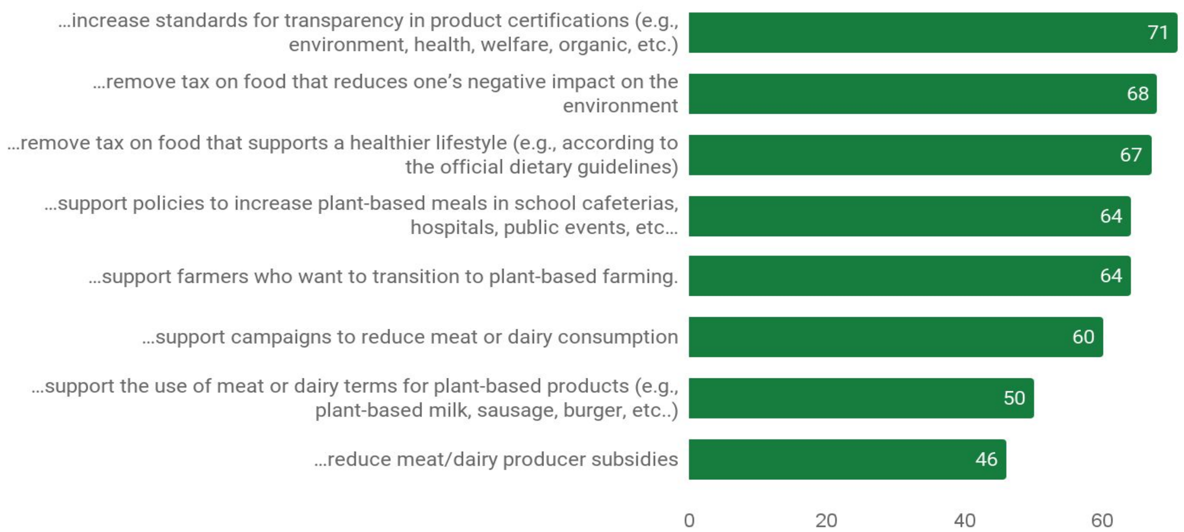
Opinion on policy



Q22: In your opinion, how much do you agree or disagree with the following statements regarding the actions that policymakers should take? I believe that my government should... | Single choice | Total agreement level (Strongly agree + Somewhat agree + Agree) (IT n=750)

Italian respondents are notably in favour of increasing standards for transparency in product certification (environment, health, welfare, organic, etc.), at 71% agreement. Following closely behind, 68% of respondents support tax exemptions on food products that have a reduced impact on the environment, despite environmental concerns *not* ranking as a significant motivator for individual change**, signaling strong receptivity to opportunities for institutional changes.** Adopting nomenclature like "milk" or "cheese" on plant-based alternatives is notably less aligned with Italian consumer preferences and cultural perspectives.

What trends are likely to shape the future of the plant-based market in Italy?

"Looking ahead, the future of plant-based cuisine in Italy will be an exciting blend of tradition and innovation. With a growing interest in exploring diverse global flavours, we expect to see an increase in the incorporation of ethnic cuisines and exotic ingredients into our culinary landscape. In addition, the emergence of fermented products, such as miso and other Asian-derived fermentations, will add depth and complexity to plant-based offerings. By exploring unique pairings to enhance the cooking experience, we're not just following trends, we're shaping a vibrant and flavourful future where plant-based options are able to flourish."

Nicoletta Aquaro

Global Innovation Platform Sr. Manager, Barilla Group

Conclusions & recommendations

Italy

Conclusions:

1. **Dietary shifts and motivations:** The consumer landscape in Italy shows a noticeable shift away from meat and dairy consumption, driven mostly by health concerns.
2. **Dietary lifestyles are gradually evolving:** Although there's a growing willingness to decrease meat and dairy consumption, the number of individuals reporting to follow a plant-based diet remains low, suggesting room for enhancing social acceptance.
3. **Consumer preferences and challenges:** In Italy, while legume consumption rates are frequent, challenges persist in purchasing plant-based alternatives, notably for its lack of taste, non-affordability, and lack of information. Moreover, Italy uniquely prioritizes texture among the top factors influencing these purchases.
4. **Consumer trust:** While there is still a need for information and openness regarding plant-based alternatives and diets in Italy, trust in plant-based alternatives has increased substantially over the past three years, more so than in any other country, with 57% of consumers reporting an increase in trust.
5. **Social influencers:** Italian consumers rely heavily on established institutions, having the highest levels of trust in health and/or nutrition-society websites as well as the websites of governmental and non-governmental organisations when looking for information regarding plant-based products. Moreover, Italian consumers highly support government initiatives that encourage healthier and more climatic lifestyles.

Recommendations:

1. **Health-centric behavioural change:** Leverage the significance Italians place on health as a primary driver of behavioural change to promote plant-based diets in communications and product development. Emphasising attributes such as low fat content, high protein content, and other nutritional advantages can effectively resonate with health-conscious consumers.
2. **Closing the Intention-Action gap:** To bridge the gap between meat reduction and the adoption of plant-based diets, integrating legumes into product innovation can capitalize on Italy's rich culinary heritage. However, it's imperative to maintain a clear distinction from traditional denominations, especially when labeling new products.
3. **Institutional support for dietary transition:** Italian consumers show promise in adopting plant-based products, but institutional support is crucial for further transition. Collaboration among governmental bodies, NGOs, and the food industry is essential for promoting plant-based diets through education, policy support, and awareness campaigns. Partnering with food industry stakeholders can also enhance availability and accessibility of plant-based options, fostering broader adoption of plant-based lifestyles in Italy.

THE FUTURE OF PLANT-BASED EATING IN EUROPE

Regional variations

%	AV.*	DK	DE	IT	RO	FR	NL	SP	UK	AT	PL
Meat consumers who say that they have reduced their annual meat intake	**52**	48	59	59	48	58	49	48	48	52	48
Consumers who say that they follow a flexitarian, vegan or vegetarian diet	**38**	33	55	31	35	35	47	31	38	52	26
Consumers who say that they eat plant-based foods regularly or occasionally	**36**	36	33	40	37	35	35	39	34	32	36
Consumers who are willing to increase their consumption of plant-based foods	**38**	41	36	45	40	34	33	43	37	31	37
Consumers who cite taste as a barrier	**30**	29	30	26	30	33	31	28	37	26	30
Consumers who cite price as a barrier	**38**	29	39	35	36	40	37	41	43	38	39
Consumers who trust plant-based alternatives more than they did three years ago	**46**	49	42	57	45	37	41	45	49	42	48
Consumers who support policies to increase consumption of plant-based meals	**57**	52	49	64	63	52	53	69	64	46	57
Consumers who support campaigns to reduce meat consumption	**54**	54	51	60	57	53	49	59	57	48	55

AV.: Survey Average
Green: % equal or above survey average
Yellow: % below survey average

*Average, Denmark, Germany, Italy, Romania, France, Netherlands, Spain, the United Kingdom, Austria, Poland

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Imprint

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The **Smart Protein project** is a €10-million, EU-funded project that seeks to develop a new generation of foods that are cost-effective, resource-efficient, and nutritious. Alternative-protein sources, such as legumes and side-streams from beer and pasta production, are used to generate plant-based ingredients as well as plant-based meat, seafood, dairy products, and baked goods.

ProVeg International is a food awareness organisation working to transform the global food system by replacing 50% of animal-based products with plant-based and cultured alternatives by 2040. ProVeg works with decision-making bodies, companies, investors, the media, and the general public to help the world transition to a society and economy that are less reliant on animal agriculture and more sustainable for all humans, animals, and our planet. ProVeg has offices in 12 countries across four continents and is active around the world. ProVeg has permanent observer status with the UNFCCC, special consultative status with ECOSOC, is accredited for UNEA, and has received the United Nations Momentum for Change Award.

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