



Staple Foods in Italy

November 2025

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Staple Foods in Italy

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

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Baked Goods in Italy

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2025 DEVELOPMENTS

Rising interest in Italian gastronomy and higher quality ingredients supports value growth

INDUSTRY PERFORMANCE

Packaged bread becomes a favourite with Italians

Strong demand for frozen baked goods boosted by widespread use of air fryers

WHAT NEXT?

Bread and packaged cakes to show resilience despite shift towards healthier and balanced diets

Health-led innovations will transform essential baked goods

Sustainability is a must-have strategy for players

COMPETITIVE LANDSCAPE

Artisanal has a dominant position in baked goods

Morato Pane SpA achieves dynamism through innovation

CHANNELS

Bakeries and pastry shops garner significant share of distribution

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[Breakfast Cereals in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Healthy variants lead the development of breakfast cereals

INDUSTRY PERFORMANCE

Health agenda drives demand for breakfast cereals with higher nutritional profiles

Hot cereals enjoy dynamism over 2025

WHAT'S NEXT?

Breakfast cereals to leverage innovation and health positioning to overcome maturity and drive sales

Evolving health issues will increasingly shape decision-making

Combination of health innovation and sustainability to yield competitive advantage

COMPETITIVE LANDSCAPE

Kellogg Italia SpA holds significant lead supported by health-led innovations and multi-channel marketing campaigns

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[Processed Fruit and Vegetables in Italy](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Evolving diets and modernisation ensures steady performance

INDUSTRY PERFORMANCE

Modernisation of preserved vegetables and packaged legumes
 Legumes perceived as modern and versatile product, boosted by high protein content

WHAT'S NEXT?

Processed fruit and vegetables face limited growth
 Consumers seek blend of naturalness, convenience and traceability
 Innovations are sustaining interest in processed fruit and vegetables

COMPETITIVE LANDSCAPE

CSI Cia Surgelati Italiana SpA has strong lead as frozen food specialist
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[Processed Meat, Seafood and Alternatives To Meat in Italy](#)

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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

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[Rice, Pasta and Noodles in Italy](#)

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2025 DEVELOPMENTS

Healthy performance observed in rice, pasta and noodles category

INDUSTRY PERFORMANCE

Pasta is cornerstone of Italian cuisine, but rice is gaining appeal

Noodles is the most dynamic category

Retail e-commerce gives consumers access to long tail of niche brands

WHAT'S NEXT?

Vast popularity of pasta and growing interest in Asian cuisine to support category growth

Healthier lines will attract consumer demand

Chilled pasta reaps the benefits of innovation

COMPETITIVE LANDSCAPE

Barilla Alimentare SpA remains the leading player

Alimenta Srl is the most dynamic player

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