

Snacks in Italy

June 2024

Table of Contents

Snacks in Italy

EXECUTIVE SUMMARY

Snacks in 2024: The big picture

Key trends in 2024

Competitive landscape

Channel developments

What next for snacks?

MARKET DATA

Table 1 - Sales of Snacks by Category: Volume 2019-2024

Table 2 - Sales of Snacks by Category: Value 2019-2024

Table 3 - Sales of Snacks by Category: % Volume Growth 2019-2024

Table 4 - Sales of Snacks by Category: % Value Growth 2019-2024

Table 5 - NBO Company Shares of Snacks: % Value 2020-2024

Table 6 - LBN Brand Shares of Snacks: % Value 2021-2024

Table 7 - Penetration of Private Label by Category: % Value 2019-2024

Table 8 - Distribution of Snacks by Format: % Value 2019-2024

Table 9 - Forecast Sales of Snacks by Category: Volume 2024-2029

Table 10 - Forecast Sales of Snacks by Category: Value 2024-2029

Table 11 - Forecast Sales of Snacks by Category: % Volume Growth 2024-2029

Table 12 - Forecast Sales of Snacks by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Chocolate Confectionery in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Value over volume sales continue due to lingering inflationary pressures

Innovations, from collaborations to toys and vegan alternatives, help to support sales in seasonal chocolate and chocolate with toys

Neurological experiments connected to the tasting of chocolate tablets make Vanini stand out from the crowd

PROSPECTS AND OPPORTUNITIES

Sustainability trends set to continue, such as seen with ICAM's Uganda initiative

Ferrero expected to maintain its lead thanks to ongoing innovations and sustainability commitments

Existing trends will continue and consolidate over the forecast period

CATEGORY DATA

Summary 2 - Other Chocolate Confectionery by Product Type: 2024

Table 13 - Sales of Chocolate Confectionery by Category: Volume 2019-2024

Table 14 - Sales of Chocolate Confectionery by Category: Value 2019-2024

Table 15 - Sales of Chocolate Confectionery by Category: % Volume Growth 2019-2024

Table 16 - Sales of Chocolate Confectionery by Category: % Value Growth 2019-2024

Table 17 - Sales of Chocolate Tablets by Type: % Value 2019-2024

Table 18 - NBO Company Shares of Chocolate Confectionery: % Value 2020-2024

Table 19 - LBN Brand Shares of Chocolate Confectionery: % Value 2021-2024

Table 20 - Distribution of Chocolate Confectionery by Format: % Value 2019-2024

Table 21 - Forecast Sales of Chocolate Confectionery by Category: Volume 2024-2029

Table 22 - Forecast Sales of Chocolate Confectionery by Category: Value 2024-2029

Table 23 - Forecast Sales of Chocolate Confectionery by Category: % Volume Growth 2024-2029

Table 24 - Forecast Sales of Chocolate Confectionery by Category: % Value Growth 2024-2029

Gum in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Return to sociable lifestyles benefits gum, but eco-friendly consumers are switching to mints

Bubble gum continues on a downwards trend, while Big Babol aims to boost sales with NBA partnership

Chewing Gum Day now celebrated in Italy, presenting an opportunity for brands to engage with consumers

PROSPECTS AND OPPORTUNITIES

The leading players ramp up their promotional strategies in light of ongoing volume declines

Perfetti Van Melle confirms acquisition of Trident chewing gum brand

Innovations needed in gum to modernise its image

CATEGORY DATA

Table 25 - Sales of Gum by Category: Volume 2019-2024

Table 26 - Sales of Gum by Category: Value 2019-2024

Table 27 - Sales of Gum by Category: % Volume Growth 2019-2024

Table 28 - Sales of Gum by Category: % Value Growth 2019-2024

Table 29 - Sales of Gum by Flavour: Rankings 2019-2024

Table 30 - NBO Company Shares of Gum: % Value 2020-2024

Table 31 - LBN Brand Shares of Gum: % Value 2021-2024

Table 32 - Distribution of Gum by Format: % Value 2019-2024

Table 33 - Forecast Sales of Gum by Category: Volume 2024-2029

Table 34 - Forecast Sales of Gum by Category: Value 2024-2029

Table 35 - Forecast Sales of Gum by Category: % Volume Growth 2024-2029

Table 36 - Forecast Sales of Gum by Category: % Value Growth 2024-2029

Sugar Confectionery in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Boiled sweets and gummies help to support sales in sugar confectionery

Cross-category of eco-friendliness and functionality help to boost sales in mints and medicated confectionery

Perfetti Van Melle maintains its lead, while players engage in collaborations to boost their brand profiles

PROSPECTS AND OPPORTUNITIES

Consumers expected to seek a balance of indulgence and practical products

Candy Factory tipped as a name to watch over the forecast period

Innovation will continue to be a driver for sugar confectionery

CATEGORY DATA

Summary 3 - Other Sugar Confectionery by Product Type: 2024

Table 37 - Sales of Sugar Confectionery by Category: Volume 2019-2024

Table 38 - Sales of Sugar Confectionery by Category: Value 2019-2024

Table 39 - Sales of Sugar Confectionery by Category: % Volume Growth 2019-2024

Table 40 - Sales of Sugar Confectionery by Category: % Value Growth 2019-2024

Table 41 - Sales of Pastilles, Gummies, Jellies and Chews by Type: % Value 2019-2024

Table 42 - NBO Company Shares of Sugar Confectionery: % Value 2020-2024

Table 43 - LBN Brand Shares of Sugar Confectionery: % Value 2021-2024

Table 44 - Distribution of Sugar Confectionery by Format: % Value 2019-2024

Table 45 - Forecast Sales of Sugar Confectionery by Category: Volume 2024-2029

Table 46 - Forecast Sales of Sugar Confectionery by Category: Value 2024-2029

Table 47 - Forecast Sales of Sugar Confectionery by Category: % Volume Growth 2024-2029

Table 48 - Forecast Sales of Sugar Confectionery by Category: % Value Growth 2024-2029

Ice Cream in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Ice cream sales continue to normalise after the atypical spikes and falls of the pandemic era and reopening of society

Artisanal ice creams with unique flavour combinations support sales of unpackaged products in foodservice

Private labels develop their ice cream offers, with Coop leading the charge

PROSPECTS AND OPPORTUNITIES

Sustainability will continue to be key, with Unilever making innovative developments in freezing processes

Plant-based ice cream set to see further developments over the forecast period

Protein-based food trends reach ice cream

CATEGORY DATA

Table 49 - Sales of Ice Cream by Category: Volume 2019-2024

Table 50 - Sales of Ice Cream by Category: Value 2019-2024

Table 51 - Sales of Ice Cream by Category: % Volume Growth 2019-2024

Table 52 - Sales of Ice Cream by Category: % Value Growth 2019-2024

Table 53 - Sales of Ice Cream by Leading Flavours: Rankings 2019-2024

Table 54 - Sales of Impulse Ice Cream by Format: % Value 2019-2024

Table 55 - NBO Company Shares of Ice Cream: % Value 2020-2024

Table 56 - LBN Brand Shares of Ice Cream: % Value 2021-2024

Table 57 - NBO Company Shares of Impulse Ice Cream: % Value 2020-2024

Table 58 - LBN Brand Shares of Impulse Ice Cream: % Value 2021-2024

Table 59 - NBO Company Shares of Take-home Ice Cream: % Value 2020-2024

Table 60 - LBN Brand Shares of Take-home Ice Cream: % Value 2021-2024

Table 61 - Distribution of Ice Cream by Format: % Value 2019-2024

Table 62 - Forecast Sales of Ice Cream by Category: Volume 2024-2029

Table 63 - Forecast Sales of Ice Cream by Category: Value 2024-2029

Table 64 - Forecast Sales of Ice Cream by Category: % Volume Growth 2024-2029

Table 65 - Forecast Sales of Ice Cream by Category: % Value Growth 2024-2029

Savoury Snacks in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Savoury snacks continue to benefit from the “snackification” trend

New products appear in nuts, seeds, and trail mixes

Potato chips seen both traditional and modern product innovations

PROSPECTS AND OPPORTUNITIES

Healthy growth ahead for the niche of meat snacks

Savoury biscuits will retain their appeal, thanks to fitting well with traditional Italian tastes

Health and wellness trends will remain prominent in savoury snacks over the forecast period

CATEGORY DATA

Summary 4 - Other Savoury Snacks by Product Type: 2024

Table 66 - Sales of Savoury Snacks by Category: Volume 2019-2024

Table 67 - Sales of Savoury Snacks by Category: Value 2019-2024

Table 68 - Sales of Savoury Snacks by Category: % Volume Growth 2019-2024

Table 69 - Sales of Savoury Snacks by Category: % Value Growth 2019-2024

Table 70 - NBO Company Shares of Savoury Snacks: % Value 2020-2024

Table 71 - LBN Brand Shares of Savoury Snacks: % Value 2021-2024

Table 72 - Distribution of Savoury Snacks by Format: % Value 2019-2024

Table 73 - Forecast Sales of Savoury Snacks by Category: Volume 2024-2029

Table 74 - Forecast Sales of Savoury Snacks by Category: Value 2024-2029

Table 75 - Forecast Sales of Savoury Snacks by Category: % Volume Growth 2024-2029

Table 76 - Forecast Sales of Savoury Snacks by Category: % Value Growth 2024-2029

Sweet Biscuits, Snack Bars and Fruit Snacks in Italy

KEY DATA FINDINGS

2024 DEVELOPMENTS

Popularity of healthy snack bars supports overall sales

Sweet biscuits see ongoing developments towards a “healthier” image

Private labels enhance the quality of their sweet biscuits brands

PROSPECTS AND OPPORTUNITIES

Snack bars, protein/energy bars, and cereal bars will continue to develop well over the forecast period

New launches also seen in indulgent biscuits

Dried fruit continues to struggle for several reasons, although a brighter future is ahead

CATEGORY DATA

Table 77 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2019-2024

Table 78 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2019-2024

Table 79 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2019-2024

Table 80 - Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Value Growth 2019-2024

Table 81 - NBO Company Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2020-2024

Table 82 - LBN Brand Shares of Sweet Biscuits, Snack Bars and Fruit Snacks: % Value 2021-2024

Table 83 - NBO Company Shares of Sweet Biscuits: % Value 2020-2024

Table 84 - LBN Brand Shares of Sweet Biscuits: % Value 2021-2024

Table 85 - NBO Company Shares of Snack Bars: % Value 2020-2024

Table 86 - LBN Brand Shares of Snack Bars: % Value 2021-2024

Table 87 - NBO Company Shares of Fruit Snacks: % Value 2020-2024

Table 88 - LBN Brand Shares of Fruit Snacks: % Value 2021-2024

Table 89 - Distribution of Sweet Biscuits, Snack Bars and Fruit Snacks by Format: % Value 2019-2024

Table 90 - Distribution of Sweet Biscuits by Format: % Value 2019-2024

Table 91 - Distribution of Snack Bars by Format: % Value 2019-2024

Table 92 - Distribution of Fruit Snacks by Format: % Value 2019-2024

Table 93 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Volume 2024-2029

Table 94 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: Value 2024-2029

Table 95 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks by Category: % Volume Growth 2024-2029

Table 96 - Forecast Sales of Sweet Biscuits, Snack Bars and Fruit Snacks 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/snacks-in-italy/report.