

## **Europe Non-dairy Cheese - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029**

Market Report | 2023-08-18 | 181 pages | Mordor Intelligence

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### **Report description:**

The Europe Non-dairy Cheese Market size is estimated at USD 0.85 billion in 2024, and is expected to reach USD 2.35 billion by 2029, growing at a CAGR of 22.55% during the forecast period (2024-2029).

Major retailers are adopting e-commerce platforms to captivate a larger market

- The off-trade segment dominates the distribution channels of the Europe non-dairy cheese market. In the off-trade segment, the online retail channel sub-segment is the fastest-growing one and is projected to record a CAGR of 27.3% over the forecast period. The growth of e-commerce provides companies the opportunity to access a larger target market and effectively serve customer needs. Many people started ordering dairy alternatives like non-dairy cheese online due to their hectic schedules and the nationwide lockdown in 2020. The four main e-commerce channels for dairy alternatives were direct-to-consumer, click-and-collect, retail grocery delivery, and concierge services.

- Globally, the sales of non-dairy cheese through on-trade channels in terms of value declined by 3.51% in 2020 compared to 2019 as foodservice sectors were shut down due to the outbreak. In 2020, there were 65,090 restaurants in Germany, a decrease of 8.49% from 2019. Based on the distribution channel, the overall non-dairy cheese consumption was around 0.03 kg per person in 2022. The rapid establishment of vegan restaurants and the introduction of vegan options in menus are likely to propel the non-dairy cheese market during the forecast period.

- In the off-trade segment, supermarkets and hypermarkets accounted for a major share of 58.3% by value. These retail channels have a strong position due to the wide selection of brands offered, considerable shelf space, and frequent price promotions. The demand for dairy alternative products is rising, including non-dairy cheese that is widely accessible at supermarkets and online retailers. The omnichannel approach adopted by major retailers globally is driving the non-dairy cheese market.

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The rise in flexitarian and vegetarian populations across Spain, Germany, and U.K. is estimated to drive future market demand.

- The per capita consumption of non-dairy cheese is estimated to reach 1.69 kg annually in 2029, up by 103.56% from 0.83 kg in 2023. Non-dairy cheese has significant penetration across Germany and the United Kingdom, as vegetarians and flexitarians in the countries are most likely to replace conventional cheese with plant-based cheese products. Regarding plant-based cheese, 38% of UK consumers were looking for plant-based sliced cheese at supermarkets in 2020.

- Turkey and Spain are identified as the fastest-growing markets in Europe. In Spain, the consumption of non-dairy cheese is anticipated to grow, registering a CAGR of 19.69% during the forecast period to reach a sales volume of 2,603.467 metric tonnes by the end of 2029. The rise in flexitarian and vegetarian populations across these countries is estimated to drive future market demand. In 2020, 30% of consumers were flexitarian in Spain, and 6% were vegan and vegetarian.

- High consumer awareness about plant-based nutrition and favorable macroeconomic environments are the key factors shaping the European non-dairy cheese industry. The EU's 2022 promotional policy will encourage a shift to more plant-based diets after branding red and processed meat as a cancer risk. This will create opportunities across the foodservice industry. In Germany, Pizza Hut offers three permanent vegan pizzas topped with Violife plant-based cheese. Other fast-food chains such as Domino's, McDonald's, Greggs, and Subway also use non-dairy cheese in their vegan dishes. The sales value of non-dairy cheese in Germany is estimated to grow, registering a CAGR of 20.01% during the forecast period and reaching a market value of USD 613.87 million by 2029.

#### Europe Non-dairy Cheese Market Trends

The innovations taking place within the sector, coupled with lower fat content, is largely influencing the consumption rate in the European market.

- Plant-based cheese consumption has been on the rise in Europe owing to the growing consumption of plant-based foods across the region. Consumption of plant-based foods in Europe increased by a staggering 49% between 2019 and 2020. The non-dairy cheese per capita consumption increased by 38% from 2020-2022, making it the second most consumed category of dairy alternatives after plant-based milk in Europe.

- Several innovations in the sector are influencing the consumption rate. Several non-dairy cheese varieties are emerging on the market, like non-dairy sliced cheese, which is popular across many European nations. Consumers in Spain and Germany are the most willing to choose plant-based cheese over traditional cheese. German consumers prefer to consume plant-based cream cheese (32%), sliced cheese (32%), and plant-based mozzarella (31%), which are easily available in supermarkets across the region. In Germany, there are over 90 distinct plant-based cheese substitutes and 40 different labels, making it the largest market in Europe.

- Europeans recently became inclined toward the consumption of fermented alternatives for cheeses like camembert, feta, and mozzarella, which are made exclusively from nuts like cashew, macadamia, or almond, but other bases can be found as well, including soy, seeds, and rice. Several companies like Simply V (Germany), Sheese (UK), and Vegan Deli (Monaco) are also involved in producing 'simple' cheese analogs of gouda and cheddar, as well as shredded (pizza) cheese, owing to the increased demand for various non-dairy cheese in the region. With the growing demand for plant-based cheese innovations, consumption is anticipated increase by 33.0% during 2023-2025 in Europe.

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## Europe Non-dairy Cheese Industry Overview

The Europe Non-dairy Cheese Market is fragmented, with the top five companies occupying 39.84%. The major players in this market are Bel Group, Danone SA, Saputo Inc., Simply V and Upfield Holdings BV (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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