

# Unidad de Vigilancia de Mercados

Departamento de Internacionalización. Instituto de Fomento de la Región de Murcia (mayo 2026)

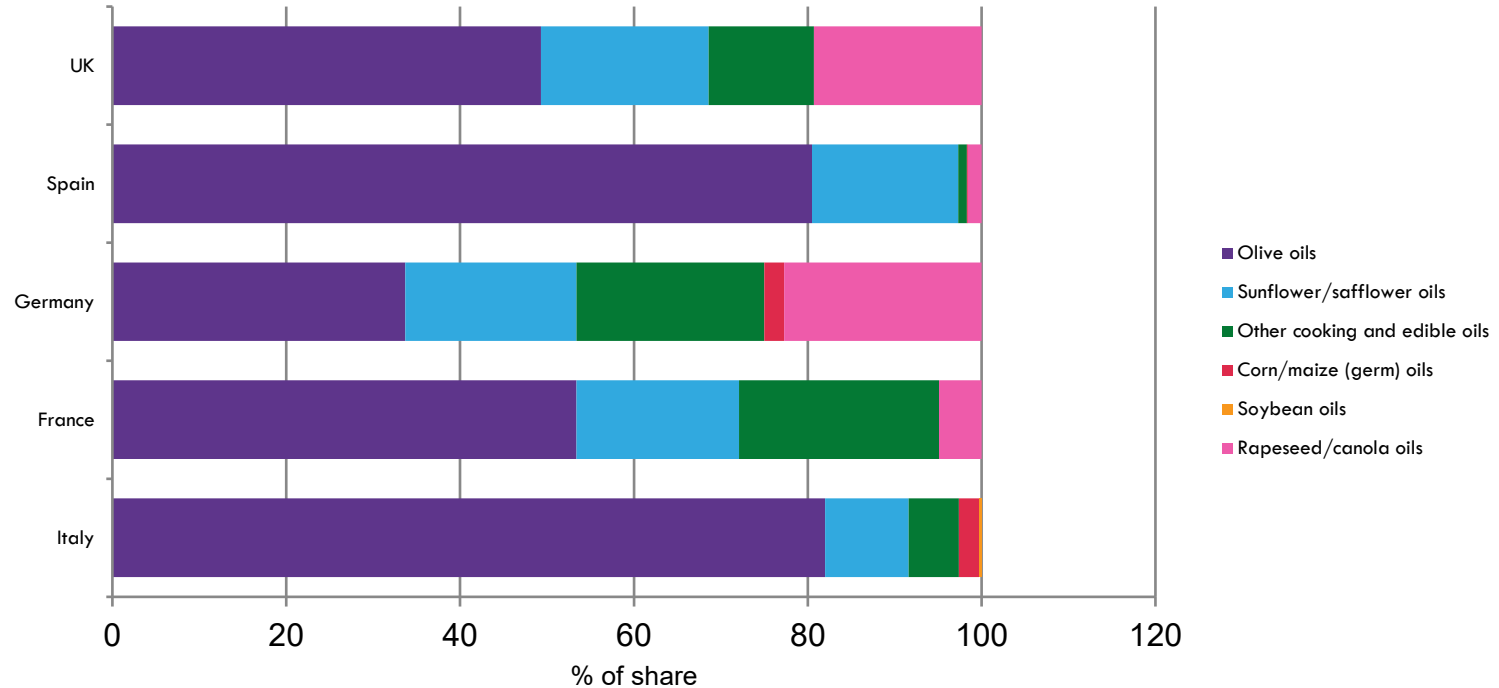
Market drivers, innovation and consumer interest in Europe, 2025



## MARKET CONTEXT & KEY DRIVERS (EUROPE)

Olive oil is the largest cooking-oils segment by retail value share across major European markets, led by Italy (82.0%) and Spain (80.5%), and also sizable in France (53.4%), the UK (49.3%) and Germany (33.7%) (note: some market figures are based on earlier years for certain countries). [1.1](#)

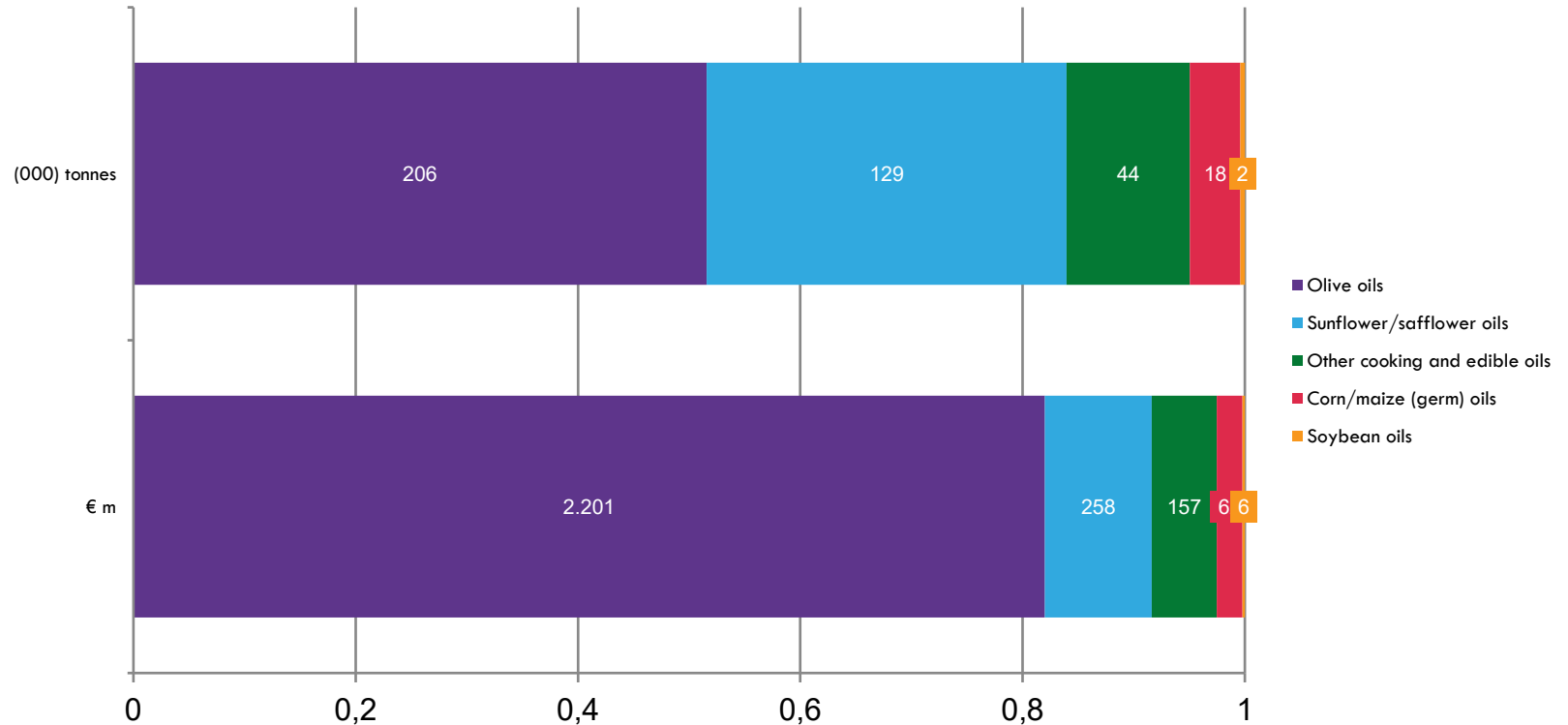
## Selected European markets: retail value sales of cooking and edible oils, by segment share, 2024



Fuente: [https://clients.mintel.com/market-dynamics/market-dynamics-italy-cooking-and-edible-oils-2025#workspace\\_SpacesStore\\_f76f4083-2f33-4638-af40-832f3376387e](https://clients.mintel.com/market-dynamics/market-dynamics-italy-cooking-and-edible-oils-2025#workspace_SpacesStore_f76f4083-2f33-4638-af40-832f3376387e)

In Italy specifically, olive oil generated €2.2bn in 2024 (82% of category value) on 205.9k tonnes (52% of category volume). [1.2](#)

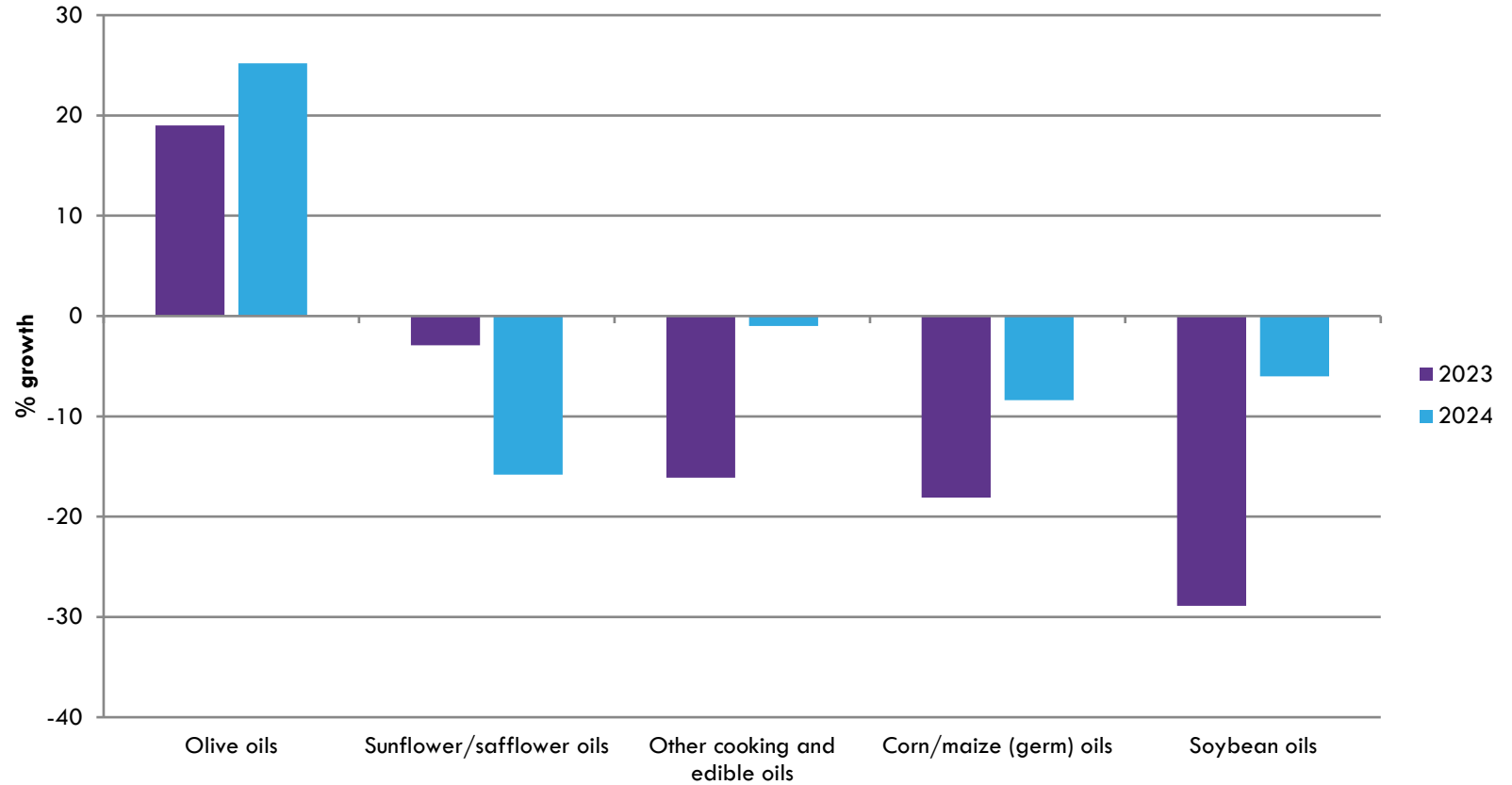
## Italy: retail value and volume sales of cooking and edible oils, by segment, 2024



Fuente: [https://clients.mintel.com/market-dynamics/market-dynamics-italy-cooking-and-edible-oils-2025#workspace\\_SpacesStore\\_0071cbf3-6551-4694-b1cb-f36551c6941d](https://clients.mintel.com/market-dynamics/market-dynamics-italy-cooking-and-edible-oils-2025#workspace_SpacesStore_0071cbf3-6551-4694-b1cb-f36551c6941d)

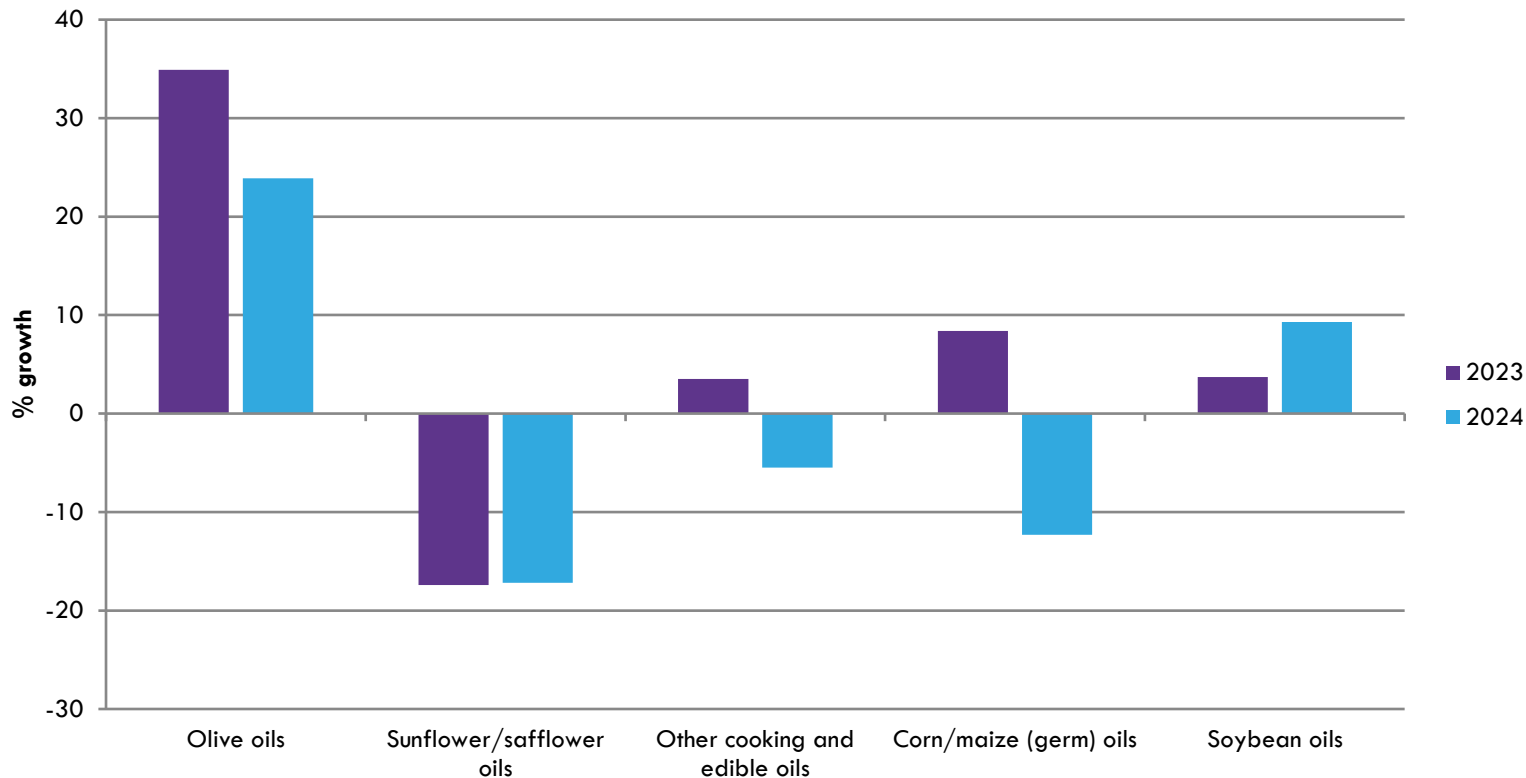
A central recent driver has been price surge and volatility linked to Mediterranean harvest shortfalls, which pushed up value sales while contributing to consumption pressure. [1.3](#) In Italy, olive oil value sales rose +25.2% in 2024, largely due to soaring raw material costs after poor harvests across the Mediterranean. [1.4](#) Average olive oil prices in Italy increased +23.9% in 2024. [1.5](#) Italy's olive oil CPI growth peaked at 49.8% in November 2023 and began declining from February 2025. [1.6](#)

Italy: annual retail value sales growth for cooking and edible oils, by segment, 2023-24



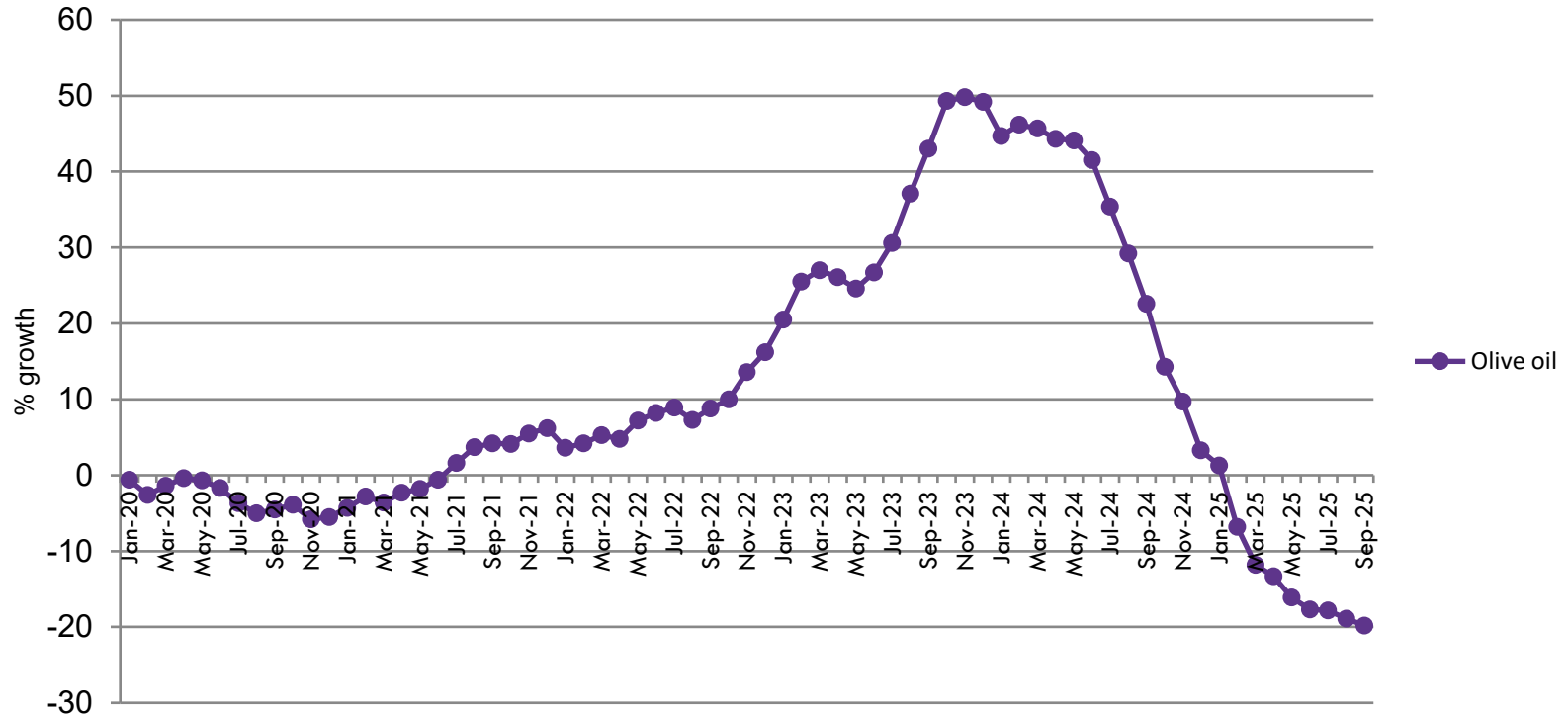
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Italy: annual growth of retail average price for cooking and edible oils, by segment, 2023-24



Fuente: [https://clients.mintel.com/market-dynamics/market-dynamics-italy-cooking-and-edible-oils-2025#workspace\\_SpacesStore\\_81a4fe55-c254-4f33-a4fe-55c254ff3399](https://clients.mintel.com/market-dynamics/market-dynamics-italy-cooking-and-edible-oils-2025#workspace_SpacesStore_81a4fe55-c254-4f33-a4fe-55c254ff3399)

# Italy: annual growth in olive oil CPI, by month, 2020-25



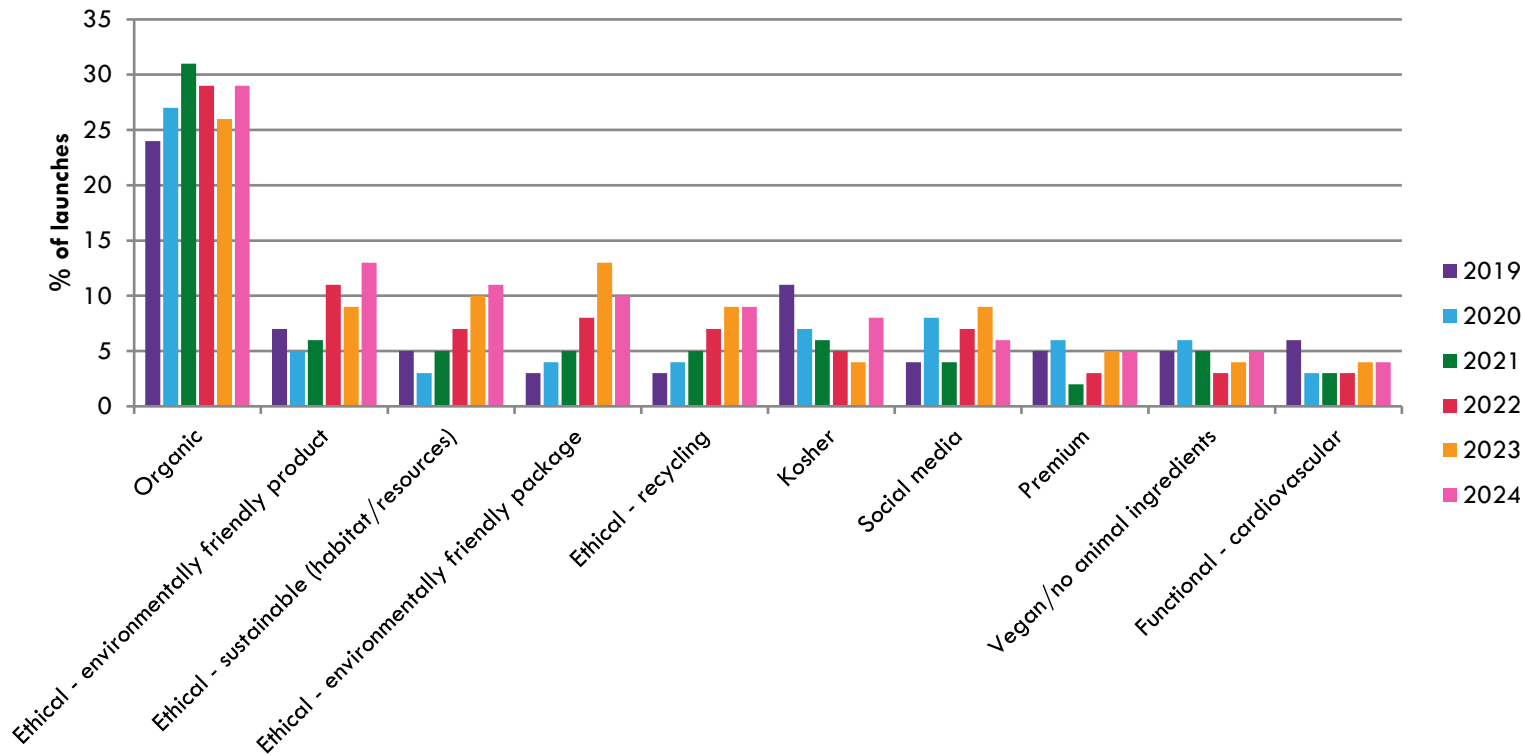
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Looking forward (Italy as a bellwether), Mintel expects short-term recovery in volume sales as prices normalise, with a longer-term outlook dependent on climatic conditions and harvest outcomes. [1.3](#)

## INNOVATION & NPD SIGNALS (EUROPE, WITH ITALY DETAIL)

Italy's 2024 launches leaned into organic, eco-friendly packaging and premium/origin cues, illustrated by biodynamic organic extra virgin olive oil, 100% recycled rPET packaging, and a PGI Sicily extra virgin olive oil. [1.7](#) GNPD claim trends show organic is the leading focus in Italy, rising from 24% of launches (2019) to 29% (2024), while environmentally friendly and sustainability-related claims also increased over the period. [1.8](#)

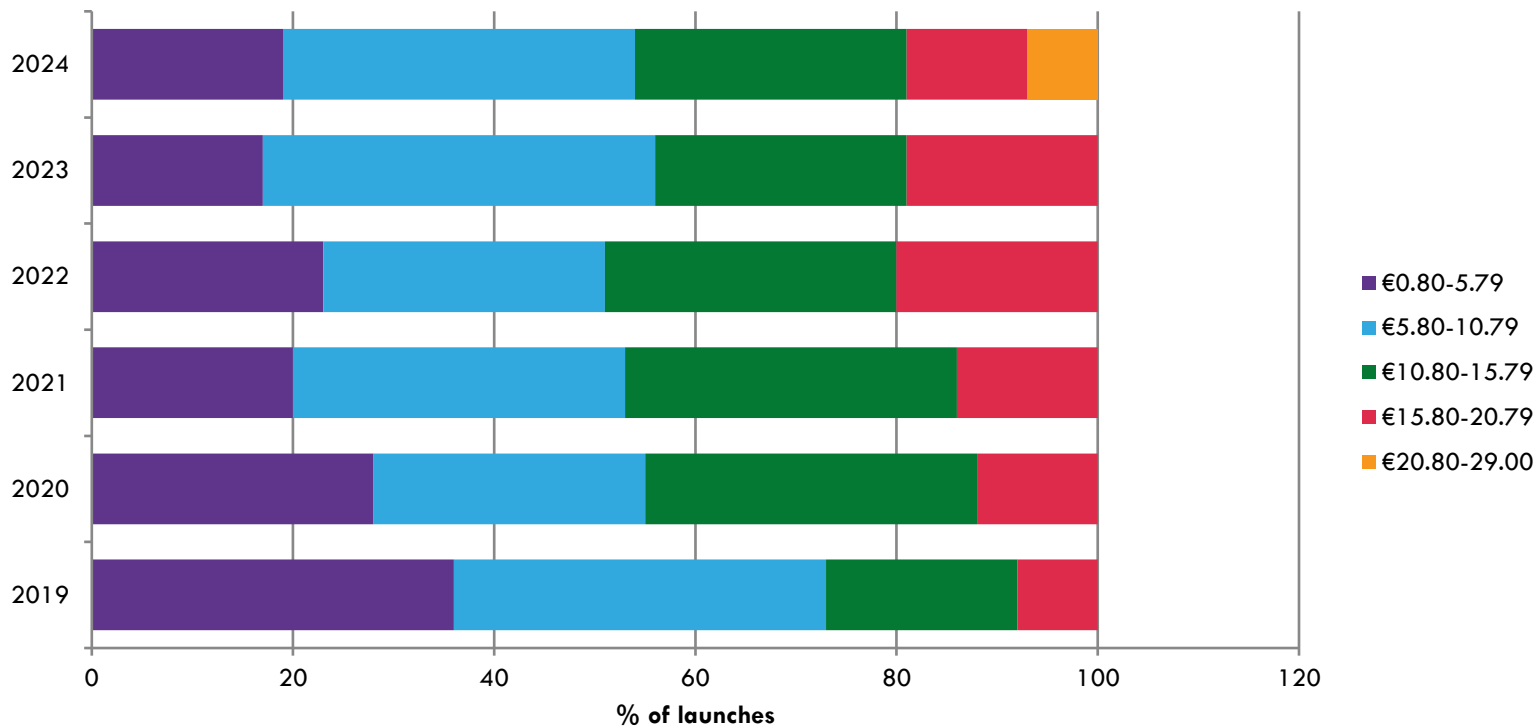
Italy: share of launches in cooking and edible oils, by claim, 2019-24



Fuente: [https://clients.mintel.com/market-dynamics/market-dynamics-italy-cooking-and-edible-oils-2025#workspace\\_SpacesStore\\_393b5c50-668f-47bb-bb5c-50668f87bb3f](https://clients.mintel.com/market-dynamics/market-dynamics-italy-cooking-and-edible-oils-2025#workspace_SpacesStore_393b5c50-668f-47bb-bb5c-50668f87bb3f)

Premiumisation is evident in Italy's NPD price architecture: products priced €20.80–€29.00 appeared for the first time in 2024, reaching 7% of launches. [1.9](#)

Italy: share of launches in cooking and edible oils, by price in euros (group), 2019-24



Fuente: [https://clients.mintel.com/market-dynamics/market-dynamics-italy-cooking-and-edible-oils-2025#workspace\\_SpacesStore\\_d4979553-af43-45ae-9795-53af4335ae30](https://clients.mintel.com/market-dynamics/market-dynamics-italy-cooking-and-edible-oils-2025#workspace_SpacesStore_d4979553-af43-45ae-9795-53af4335ae30)

## CONSUMER INTEREST & DEMAND CUES (EUROPE)

In Italy, 63% agree it's worth paying more for higher quality, and 36% believe a higher price signals higher quality—supporting premium/origin positioning. [1.10](#) In the UK, 60.55% agree food/drink from traditional regions (eg olive oil from Italy) is higher quality, while 56.95% say sustainability steps would make a brand more appealing (alongside notable scepticism: 56.05% think brands use sustainability as a marketing tool). [2.1](#)

## WHAT THIS SUGGESTS FOR EUROPE

Winning propositions in Europe are likely to combine credible quality/origin, clearer sustainability proof-points, and resilience to climate-linked supply disruption (including diversified sourcing as new regions emerge, such as Algeria). [3.1](#)