



PLANT-BASED FOODS IN GERMANY

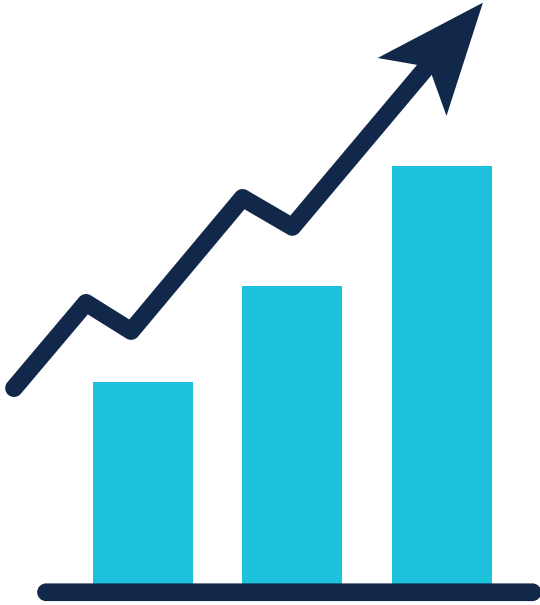


INSIGHTS FROM THE RETAIL MARKET

Dr. Kai-Brit Bechtold, ProVeg International

Based on Nielsen retail scanning data that was
analysed as part of the Smart Protein project

MARKET INSIGHTS



Although it is clearly evident that the plant-based sector is booming just by looking at supermarket shelves, reliable data is nonetheless required in order to confirm and measure these observations. For the first time, a report doing exactly that, over the past two years, is now available – and the development is indeed empirically supported by the data. Based on Nielsen retail scanning data¹ that was analysed as part of the Smart Protein project², we can now identify successful and emerging plant-based food categories and compare the German market to other European countries.

€396
million

Plant-based
milk sales

190%
growth

Plant-based
fish
(Sales value)

€181
million

Plant-based
meat sales
(vegan)*





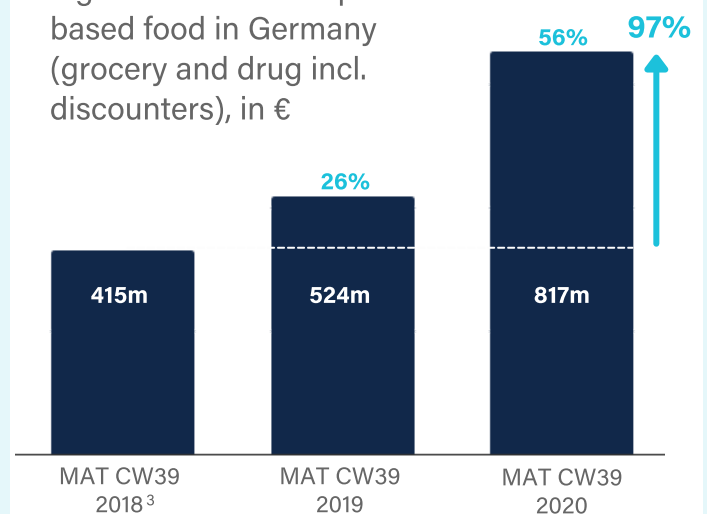
TREMENDOUS OVERALL MARKET GROWTH

Record sales for Germany

The plant-based food market in Germany demonstrated record sales value and growth rates over the past two periods, with growth rate of 26% and 56% respectively (see fig.1).

The chart on the right covers plant-based meat, milk, yoghurt, cheese, ice cream and fish. Plant-based milk leads the German market in terms of sales value, with €396m in the latest period, followed by plant-based meat (€181m). Plant-based fish showed the highest growth rate over the past two periods at 623%, followed by plant-based meat at 226%.

Fig. 1: Sales value of plant-based food in Germany (grocery and drug incl. discounters), in €





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25% of the sales value of plant-based food products are sold through discounters in Germany.

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THE IMPORTANCE OF DISCOUNTERS IN GERMANY

Germany is known for its strong discount stores, and 25% of the sales value of plant-based food products comes from discounters.

The share is especially high for plant-based meat (30%), followed by plant-based milk (28%).

Sales growth rates in German discounters are even higher than in the overall German market – a strong indication that plant-based food is becoming mainstream.

The increasing offerings of private-label brands in discounters (e.g. Penny's Food For Future, Lidl's Next Level or Aldi's My Veggie Day), also support this development.

PLANT-BASED MEAT

A key growth category

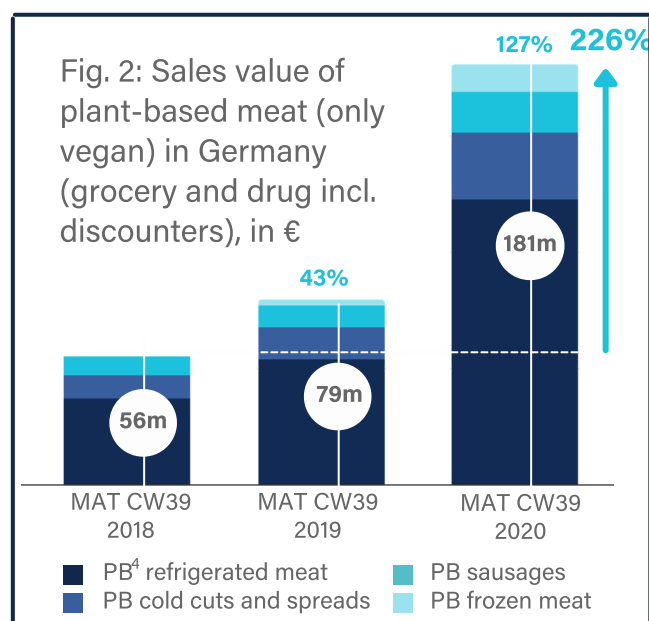
The plant-based meat sector in Germany is one of the largest and the fastest-growing among the 11 countries analysed.

Sales of vegan and vegetarian meat alternatives between October 2019 and September 2020 accounted to an impressive €357m, with more than half of the sales coming from vegan products (€181m, 51%) as shown in fig. 2.

In this segment, plant-based refrigerated meat (e.g. burger patties, nuggets, mince) is by far the most successful category in Germany (€123m).

Even though plant-based frozen meat (e.g. burger patties, nuggets, minced) had the lowest sales value (€12m), it is the fastest growing category, with a sales increase of 403%, just in the latest period.

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A huge opportunity is the development of whole cuts of meat, as they are not widely available on the German market yet.
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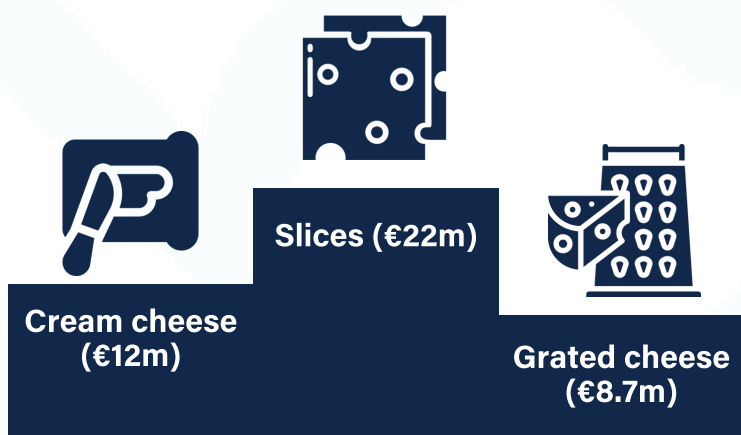
PLANT-BASED CHEESE

A leading product category

Plant-based cheese is one of the most promising plant-based food categories. Among the countries analysed, Germany has the largest plant-based cheese sector (€44m).

Plant-based sliced cheese (€22m) dominates the market. However, smaller subcategories like plant-based mozzarella (e.g. Mondarella) are also experiencing increased growth.

This is in line with findings from the ProVeg European Consumer Survey which showed potential demand for greater product variety and improved nutrient profile, as well as a lack of affordable products currently on the market⁵.



WIDER PLANT-BASED DAIRY



Germany leads the European market

Germany has the largest plant-based milk sector (€396m) of those countries analysed. Oat milk (€184m) is by far the leading category, surpassing soya (€74m) in the 2019 period. Oat shows also the strongest growth.

Germany also leads the European market for plant-based yoghurt (€127m). Soya (€107m) dominates this segment, followed by coconut and lupine.

Plant-based ice cream also experienced huge growth over the past two periods (78%) with a total sales value of €67m.





PLANT-BASED FISH

A category experiencing explosive growth

Plant-based fish is the fastest-growing food category in Germany over the two periods, with a growth rate of 623% over the past two periods and a sales value of €1.9m in the 2020 period.

In the second period, plant-based fish even arrived on the shelves of discounters, which provided 13% of total sales value.

This highlights the strong potential of this category – particularly in light of a recent study conducted by a consumer advice centre in Hessen, Germany, which showed that there is still much room for improvement in terms of taste, texture, nutrient profile, and price point⁶.

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Plant-based fish is the fastest-growing food category in Germany.

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KEY TAKEAWAYS

Among the analysed countries Germany has one of the largest and fastest-growing markets for plant-based food.

Discounter stores are of particular importance in Germany.

Plant-based meat is the most important plant-based food category in Germany.

Plant-based fish is the fastest-growing plant-based food category in Germany.

Plant-based cheese is one of the most lucrative plant-based food categories in Germany.

€181m

Plant-based meat sales (vegan only)*

€128m

Plant-based yoghurt sales

€396m

Plant-based milk sales

127%

Plant-based meat (vegan only)

77%

Plant-based cheese

190%

Plant-based fish

KEY ACTIONS

Next steps for success in Germany

ProVeg strongly recommends that retailers and manufacturers in Germany enter the plant-based food sector.

ProVeg recommends that retailers offer convincing plant-based private-label products, and that brands consider pushing prices lower in order to offer their products in discounters.

ProVeg recommends developing whole cuts of plant-based meat as well as plant-based frozen-meat alternatives that target convenience, as these products are not yet widely available in Germany.

ProVeg recommends developing affordable plant-based-fish products that mimic conventional fish in terms of nutrition, taste, and texture.

Proveg recommends developing different types of plant-based cheese that mimic conventional cheese at an affordable price point.



A EUROPEAN LEADER

The German plant-based food market is one of the best-developed markets among the European countries analysed.

Plant-based milk is the leading category in terms of sales value at €396m, followed by plant-based meat (€181m, vegan only) and plant-based yoghurt (€127m). Plant-based fish (623%), plant-based meat (226%, vegan only) and plant-based cheese (150%) are the fastest growing categories over the past two periods.



DOWNLOAD THE FULL REPORT

Download the full [Smart Protein Plant-based Food Sector Report](#) for more detailed data (e.g. sales volume, discounter share) for all eleven analysed counties' plant-based food markets and [watch the webinar recording](#) for cross-country comparisons.

OUR TEAM

Stephanie Jaczniakowska-McGirr

International Head of Food Industry
& Retail

Dr. Kai-Brit Bechtold

Senior Consumer Research Scientist

Dirk Liebenberg

Senior Project Manager

Lina Sommer

Working Student

GET IN TOUCH

corporate@proveg.com



REFERENCES & MORE INFORMATION

1) Analysis based on Nielsen MarketTrack. Nielsen MarketTrack: Germany, grocery and drug, Plant-based meat (only vegan), plant-based milk, plant-based cheese, plant-based yoghurt, plant-based fish, plant-based ice cream, MAT cw39 2018 vs 2019 vs 2020. The full Smart Protein Plant-based Food Sector Report can be downloaded [here](#). The Plant-Based Food Sector Report reflects only the author's view and the European Commission is not responsible for any use that may be made of the information it contains.

2) [Smart Protein](#) is a €10 million, EU-funded project that seeks to develop the next generation of foods which are cost effective, resource efficient, and nutritious. Alternative protein sources, such as legumes and side streams of beer and pasta production are used to generate ingredients and plant-based meat, seafood, dairy products, and baked goods.

3) Moving Annual Total (MAT) Calendar Week (CW) 39 2018 vs 2019 vs 2020. The data shows added up sales for three twelve-months-long periods from CW40 in 2017 to CW39 in 2018 (MAT CW39 2018), CW40 in 2018 to CW39 in 2019 (MAT CW39 2019) and CW40 in 2019 to CW39 in 2020 (MAT CW39 2020).

4) PB=plant-based.

5) ProVeg International (2020): European Consumer Survey on Plant-based Foods – Describing the product landscape and uncovering priorities for product development and improvement. Report. Berlin. Available at: <https://proveg.com/what-we-do/corporate-engagement/proveg-consumer-survey-report-download/> (last access 04/06/2021).

6) Verbraucherzentrale Hessen (2020): Geschmackssache: Veganer Fischersatz an Weihnachten oder Silvester. Available at: <https://www.verbraucherzentrale-hessen.de/pressemeldungen/lebensmittel/geschmackssache-veganer-fischersatz-an-weihnachten-oder-silvester-55226> (last access 04/06/2021).

