

A man with a beard and a woman with glasses and curly hair are smiling and looking at each other while cooking in a kitchen. The man is wearing a striped shirt, and the woman is wearing a green and white patterned shirt and a white apron. They are both holding wooden skewers. The background shows a kitchen with shelves and jars.

PLANT-BASED FOOD IN GERMANY

Market and Consumer Insights

ABOUT THE DATA

All data was generated as part of the Smart Protein project. Smart Protein is a €10-million, EU-funded project that seeks to develop a new generation of foods that is cost effective, resource efficient, and nutritious. Alternative protein sources such as legumes and side-streams of beer and pasta production are used to generate plant-based ingredients and plant-based meat, seafood, dairy products, and baked goods.

Smart Protein Pan-European Consumer Survey

The survey asked more than 7,500 people in Germany and nine other European countries about their attitudes towards the consumption of plant-based foods, their trust in relation to such products, their current consumption habits, the key drivers of their food choices, and various other relevant topics in the field of alternative protein.

The survey was carried out by Innova Market Insights in June 2021. Screener questions were established for age groups and gender, and only consumers who are responsible for household grocery shopping were surveyed. The results were published in two reports that you can download [here!](#)



ABOUT THE DATA



Smart Protein Plant-based Food Sector Report

This analysis is based on scanning data from Nielsen MarketTrack for Germany and 10 other European countries and covers six different plant-based products categories in each country, depending on availability (plant-based meat, fish, milk, yoghurt, cheese, and ice cream). The report shows sales values in Euros and sales volumes in kilograms or litres for the overall market, including discounters, as well as for discounters separately.

The data covers moving annual totals for Sep/Oct (depending on the country, between calendar weeks 39 and 42) 2018 vs 2019 vs 2020. This means that it presents the total sales values from October 2017 to September 2018, versus October 2018 to September 2019, versus October 2019 to September 2020. Download the full report [here](#)!



KEY INSIGHTS (1/2)



Consumer profile

10% of German consumers are plant-based eaters (vegetarian+vegan), making Germany the country with the highest share of plant-based eaters among the analysed European countries. 30% of Germans identify as flexitarian.



Consumption of animal-based products

German consumers consume milk the most frequently (35% daily), followed by cheese (24% daily) and yoghurt (21% daily). In terms of meat, poultry is the most consumed (46% at least once a week).



Animal-based meat consumption

51% of German consumers have reduced their meat consumption in the past year, making Germany the country with the highest share of meat reducers after Romania among the analysed countries.



Animal-based dairy consumption

32% of consumers say they will consume fewer dairy products (e.g. milk, yoghurt, cheese) in the next six months. The market for plant-based dairy products counts among the largest and fastest growing markets in Europe.



KEY INSIGHTS (2/2)



Consumption of plant-based products

Looking at plant-based food, plant-based milk (28% at least once a week), plant-based yoghurt (21% at least once a week), and plant-based poultry and beef (20% at least once a week) are the most frequently consumed.



Plant-based meat consumption

Compared to other countries analysed, German consumers are most likely to pay more for plant-based meat than for animal-based meat. 26% are likely to pay a higher price if the plant-based product has the same taste and texture as animal-based meat.

German consumers specifically wish they could buy plant-based minced meat, burger patties (32%), chicken breasts, and sausages (30%) in supermarkets.

The plant-based meat market in Germany is the fastest growing among the analysed European countries.



Plant-based dairy consumption

In terms of plant-based cheese, German consumers would especially like to see plant-based cream cheese (32%), sliced cheese (32%), and plant-based mozzarella (31%) available in supermarkets.

The market for plant-based dairy products counts among the largest and fastest growing markets in Europe. Plant-based milk is the largest segment in the German plant-based food market.



Plant-based fish

German consumers specifically wish they could buy more plant-based fish sticks (27%) and smoked salmon (22%). Sales value for plant-based fish increased by 623% over the two periods.



Preferred ingredients for plant-based foods

Potatoes (40%), rice (37%), and lentils (33%) are Germans' favourite core ingredients in plant-based foods.



Q1 Which category best describes your current dietary lifestyle?

10% of German consumers are plant-based. 30% (flexitarians) are reducing their meat consumption.

Omnivore

I frequently eat meat, such as beef, pork, chicken, turkey, fish and/or shellfish

Flexitarian

I sometimes eat meat, but I am trying to reduce my meat consumption and often choose plant-based foods instead

Pescetarian

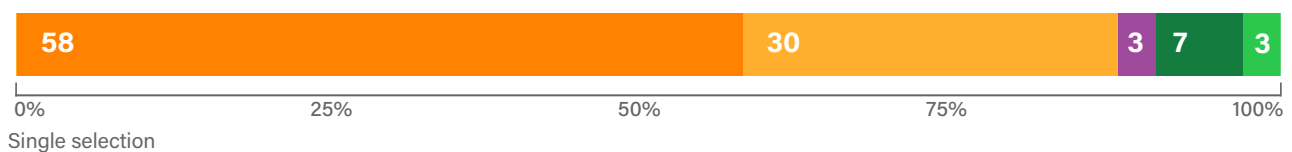
I eat fish and/or shellfish, but no other types of meat

Vegetarian

I don't eat meat and fish of any kind, but I do eat eggs and/or dairy products

Vegan

I don't eat meat, fish, eggs, dairy products, or any other animal-based ingredients



Q2 How long have you been following your current dietary lifestyle?

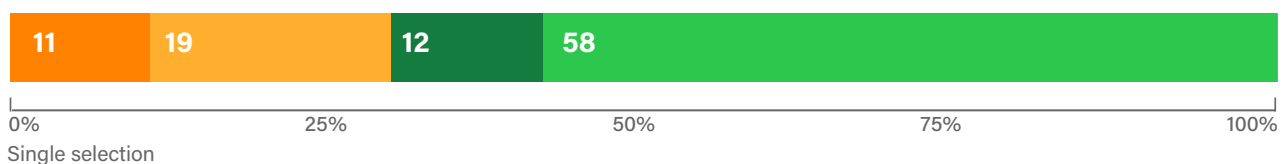
58% of Germans have been following their current diet lifestyle for more than 5 years.

Less than six months

6 months to 2 years

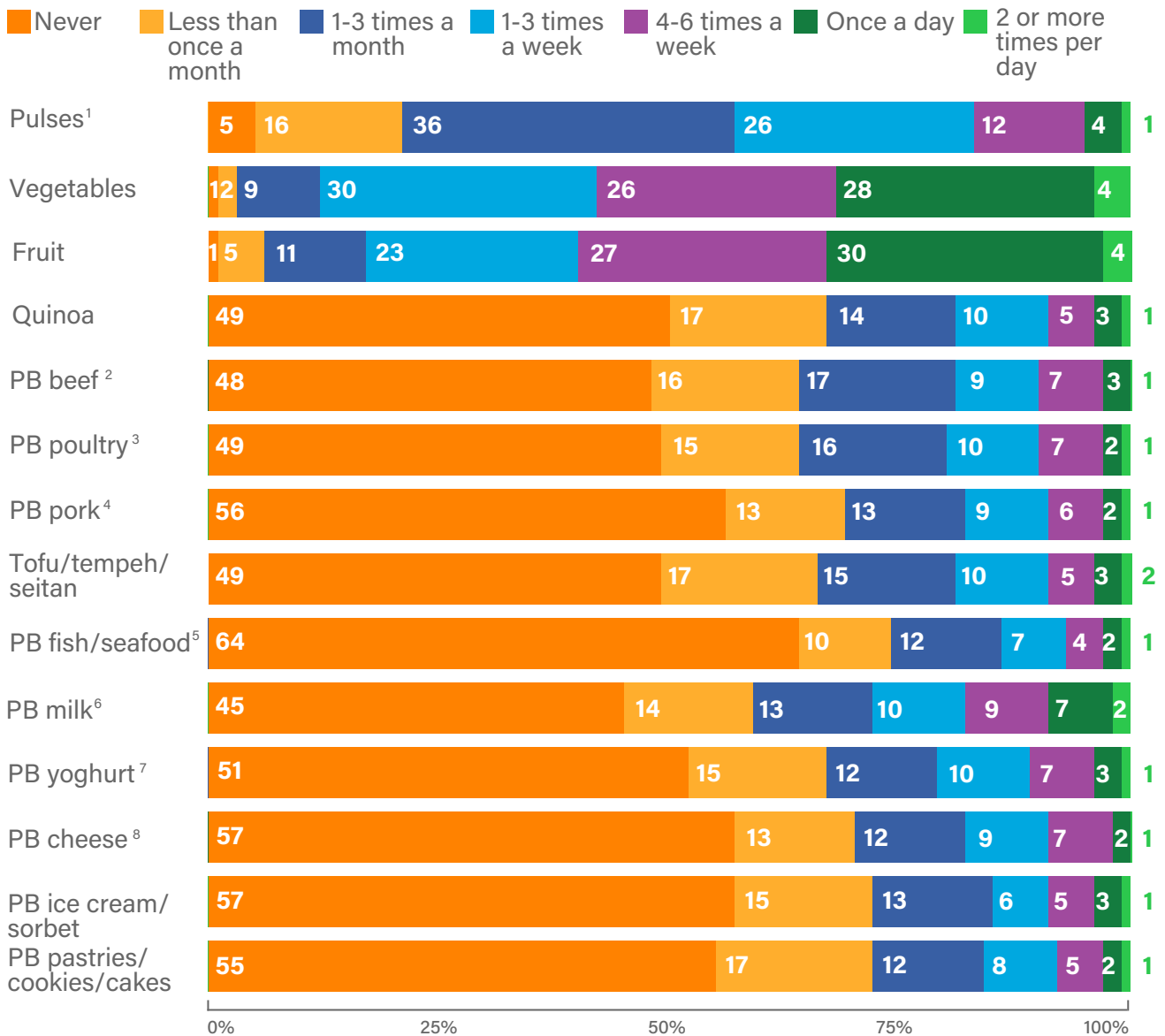
2 to 5 years

More than 5 years



Q3

Which statement best describes how frequently you have consumed the following foods in the last 12 months? (2/2)

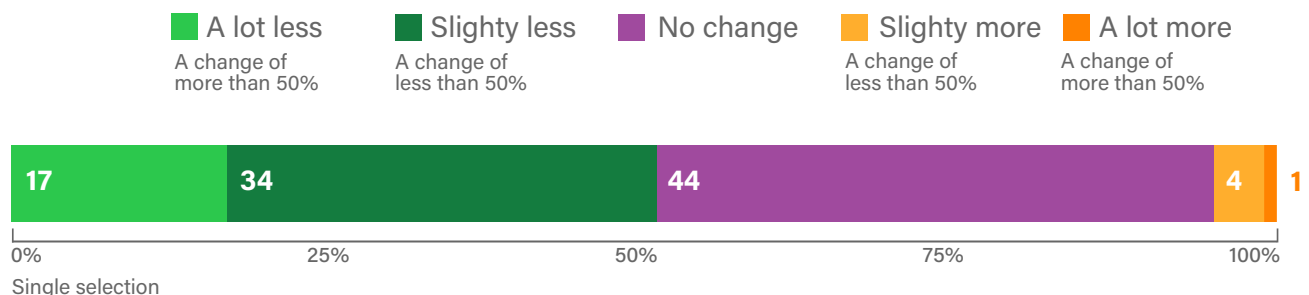


Single selection | Examples: 1: lentils, beans 2: PB burger/mince 3: PB chicken strips/chunks 4: PB sausage/pulled pork 5: PB fish sticks/fish burger/tuna 6: soya almond/oat/coconut/rice/pea milk 7: soya/almond/oat/coconut yoghurt 8: PB cream cheese/cheese slices/grated cheese

Q4

Compared to a year ago, how much meat (e.g. beef, pork, chicken) are you eating now?

51% of German consumers now eat less meat compared to a year ago.





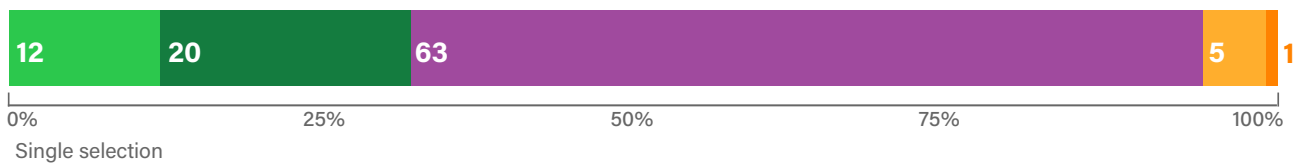
Q5

Do you intend increasing or reducing your consumption of the following food categories in the next six months?

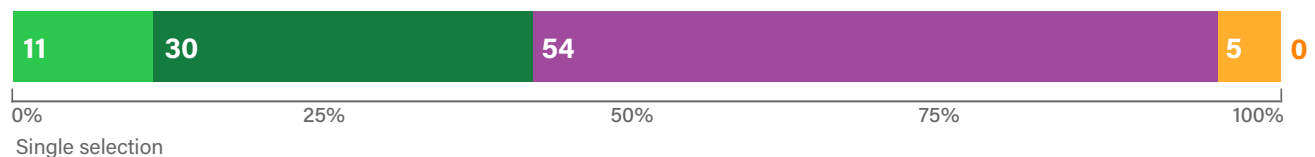
Nearly 42% of German consumers intend to reduce their meat consumption in the next six months. 32% plan on consuming less dairy.

■ I will consume less
 ■ I will consume a little less
 ■ I will consume about the same
 ■ I will consume a little more
 ■ I will consume more

a Dairy products (e. g. milk, yoghurt, cheese)



b Meat products (e. g. beef, pork, chicken)

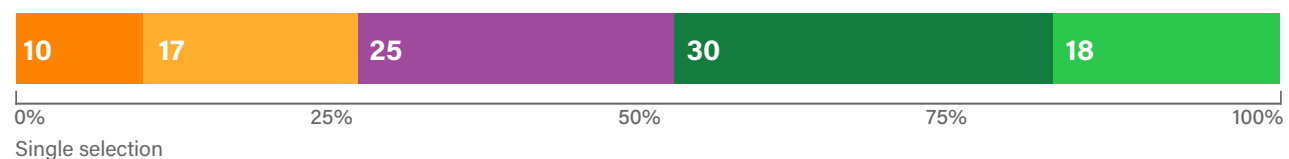


Q6

How important is an organic label for you when it comes to plant-based food products (e.g. meat/dairy alternatives)

48% of German people think an organic label is important when it comes to plant-based food products.

■ Not important at all
 ■ Somewhat unimportant
 ■ Neither important nor unimportant
 ■ Somewhat important
 ■ Very important



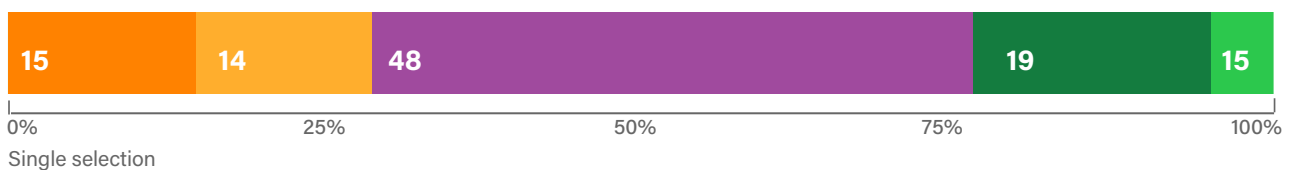
Q7

Do you intend increasing or reducing your consumption of the following plant-based food categories in the next six months?

24% of German consumers intend to consume more plant-based dairy products in the next six months.

■ I will consume less
 ■ I will consume a little less
 ■ I will consume about the same
 ■ I will consume a little more
 ■ I will consume more

a Plant-based dairy products (e. g. soya/oat milk, coconut yoghurt)



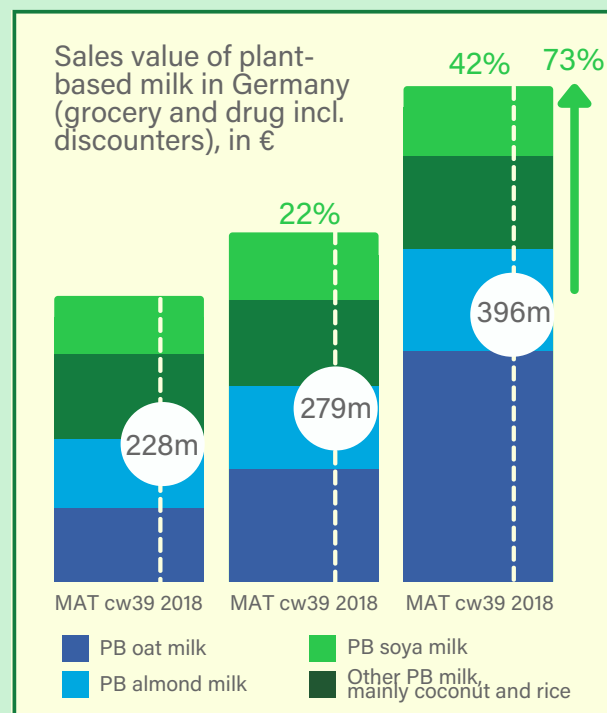
Plant-based dairy

Germany has the largest plant-based-milk sector (€396m) of the countries analysed. Oat milk (€184m) is by far the leading segment as well as the fastest growing, surpassing soya (€74m) in the 2019 period.

A similar picture is evident in discount stores, which constitute 28% of sales value.

Plant-based milk has the largest share of the plant-based-food sector in Germany, indicating that this category is becoming mainstream. However, the market for plant-based milk is still not saturated, as the double-digit growth rates suggest.

Germany also leads the European market for plant-based yoghurt (€127m). Soya (€107m) dominates this segment, followed by coconut and lupine. This category experienced double-digit growth of 48% over the two periods, with 12% of sales values coming from discount stores.



Plant-based ice cream also showed huge growth over the past two periods (78%), with a total sales value of €67m. Most sales came from family packs and multipacks, with single packs being less relevant. 23% of sales values came from discount stores.

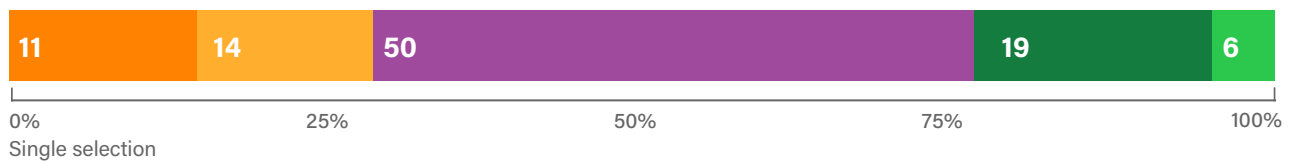
Q7

Do you intend increasing or reducing your consumption of the following plant-based food categories in the next six months?

25% of German consumers intend to consume more plant-based meat products in the next six months.

■ I will consume less
 ■ I will consume a little less
 ■ I will consume about the same
 ■ I will consume a little more
 ■ I will consume a little more

b Plant-based meat products (e. g. plant-based burgers/sausages)



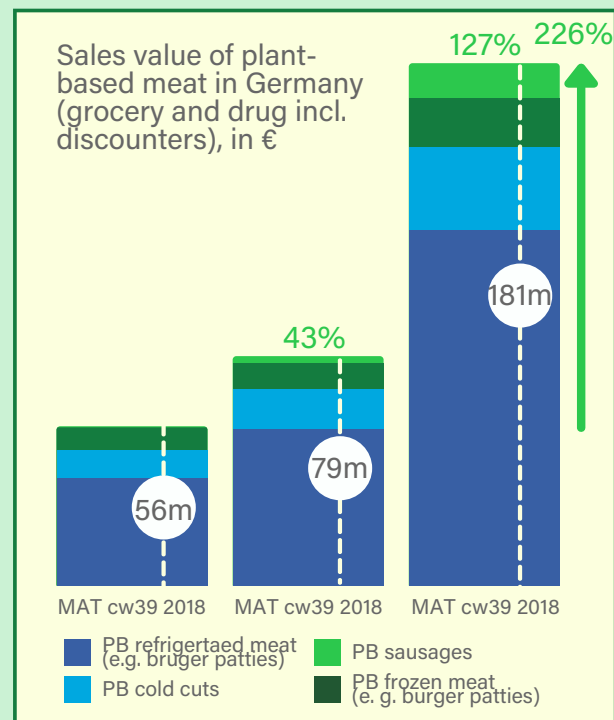
Plant-based meat

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

Sales of vegan and vegetarian meat alternatives accounted to an impressive €357m over the last period, with more than half of sales coming from vegan products (€181m/51%), as shown in the figure on the right.

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

Discount stores are important for the German plant-based meat sector, accounting for 30% of sales value and 35% of sales volume.



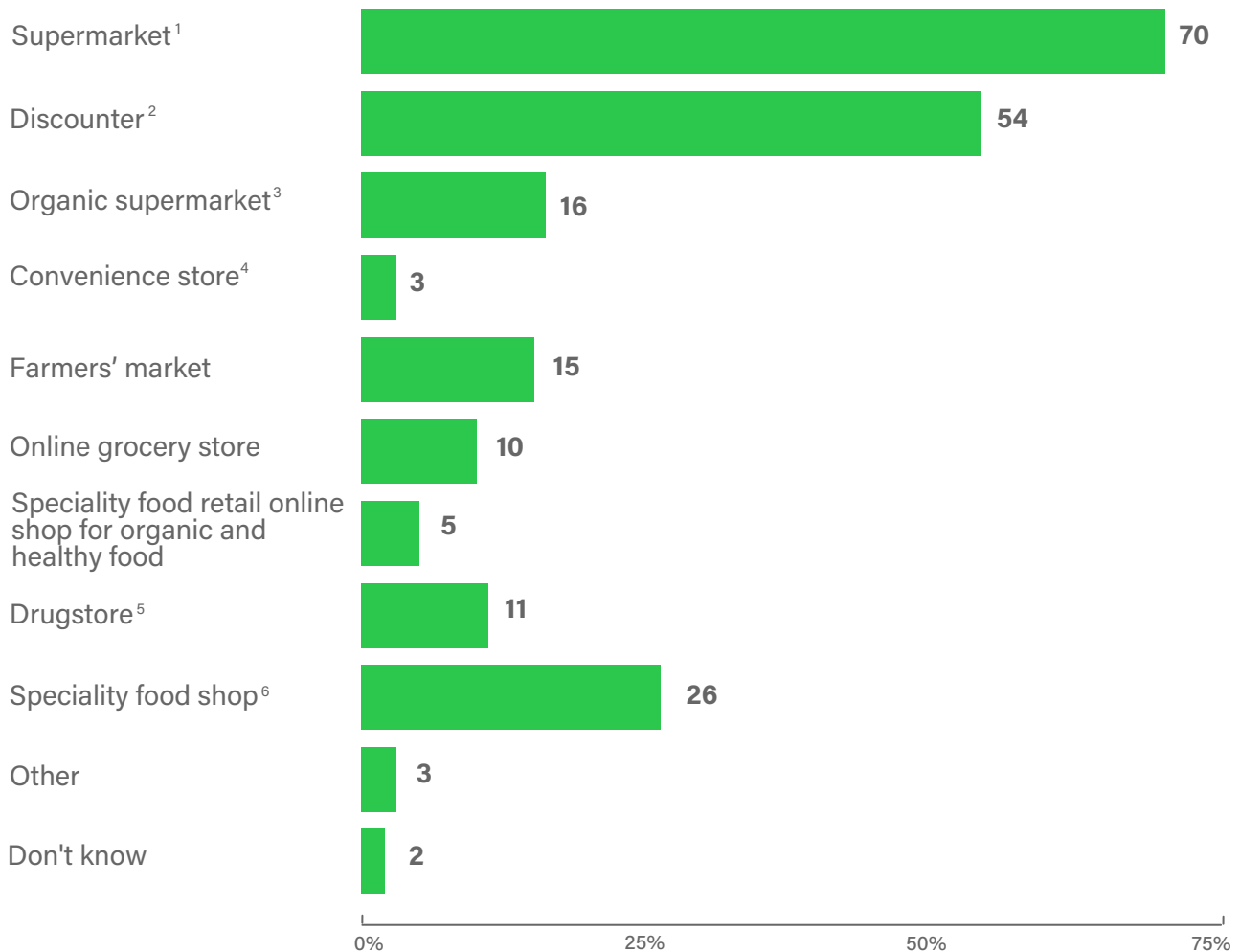
Discount-store sales are dominated by plant-based refrigerated meat (€38m), but other segments have also increased their share over the two periods, now accounting for almost two-thirds of all plant-based-meat sales in German discount stores (€16m).



Q8

Where are you likely to purchase food products most frequently from in the future?

German consumers prefer supermarket and discount stores for grocery shopping.



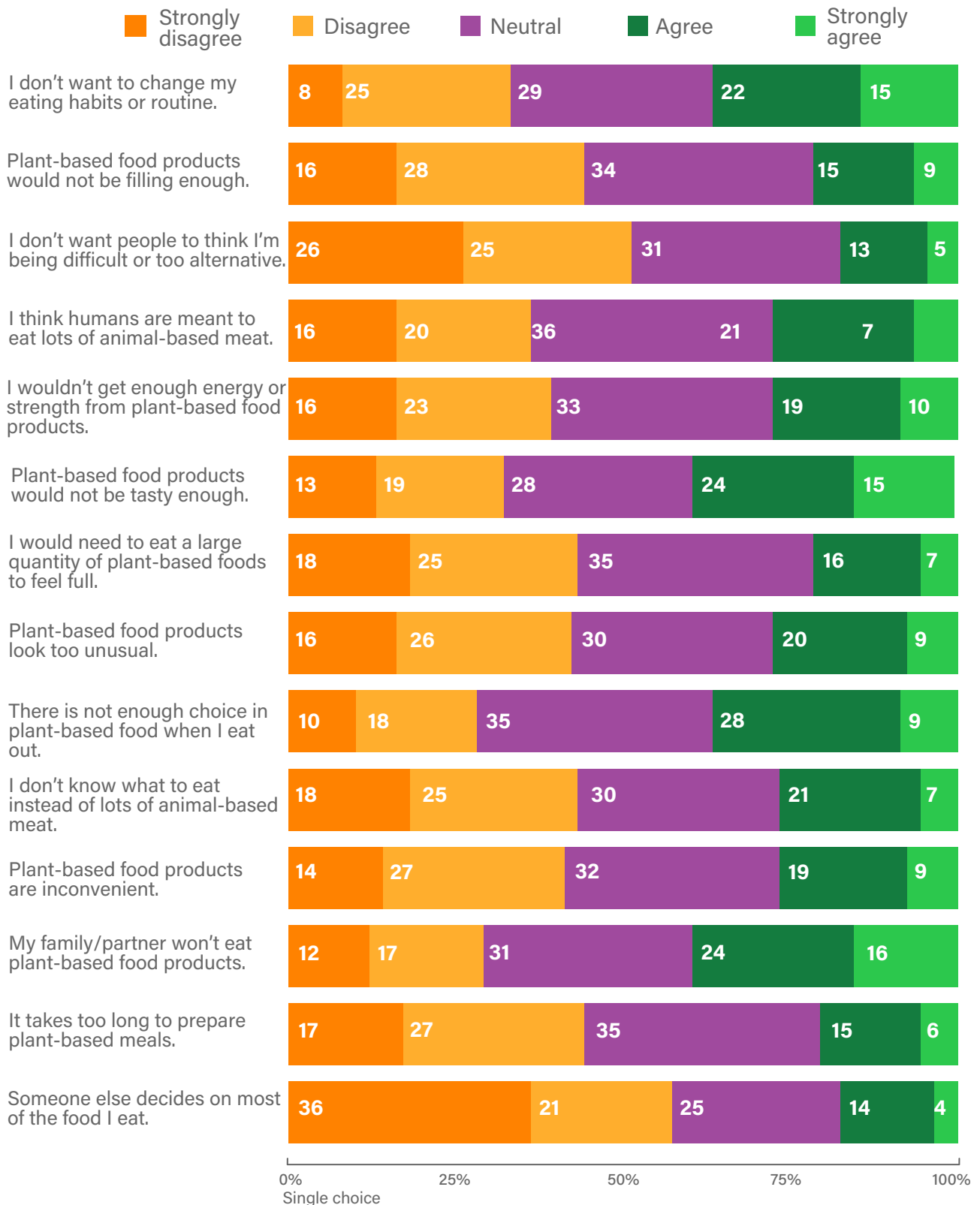
Multiple choice | Max. 3

Examples: 1: Rewe, Edeka 2: Aldi, Lidl, Penny 3: Denn's 4: Kiosk 5: Rossmann, DM 6: bakery

Q9

Please indicate how much you disagree or agree with each of the following statements with regards to barriers towards eating new plant-based food products and following a plant-based diet? (1/2)

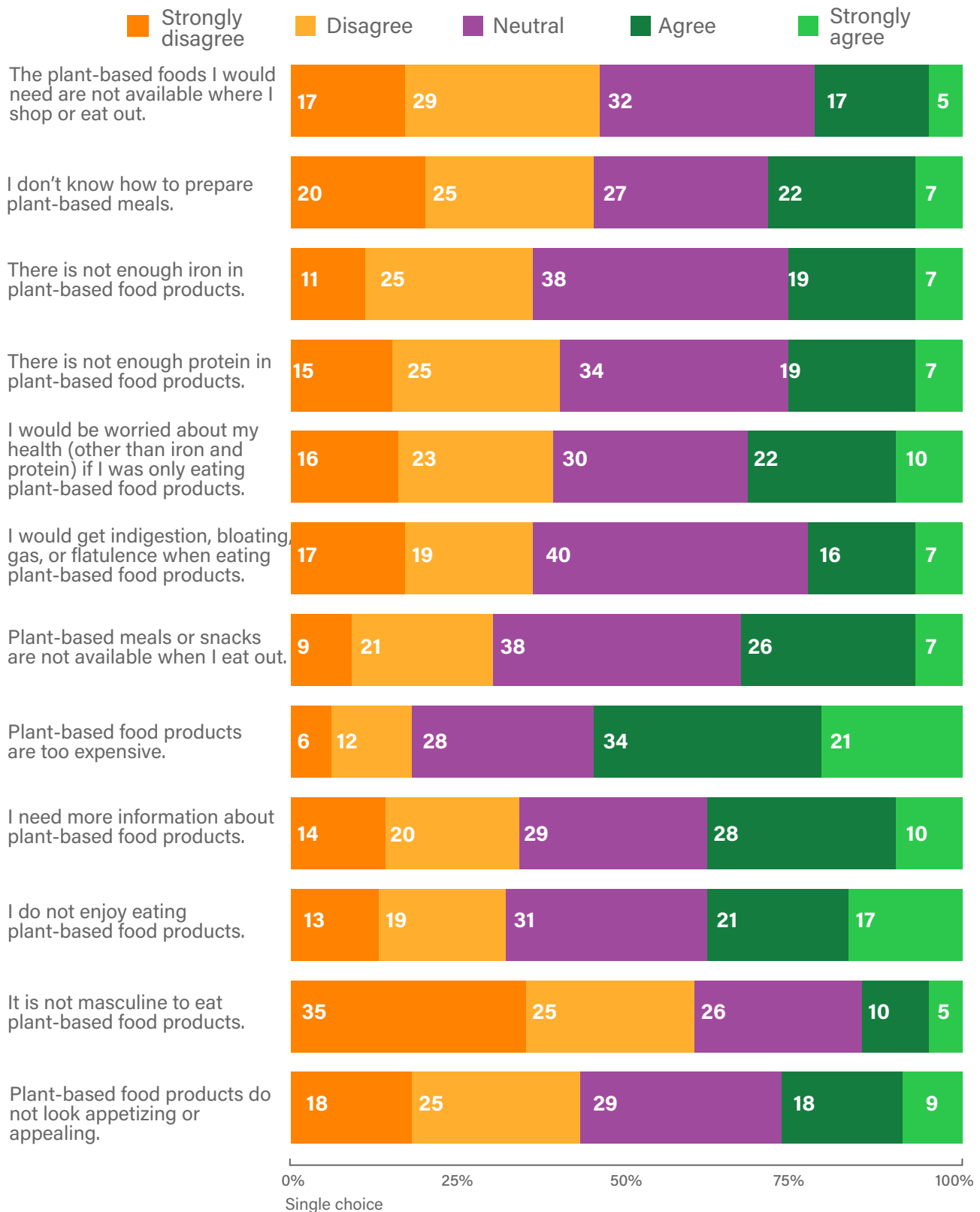
The key barriers towards plant-based products for German consumers are lack of taste, choice, and family/partner who won't eat plant-based.



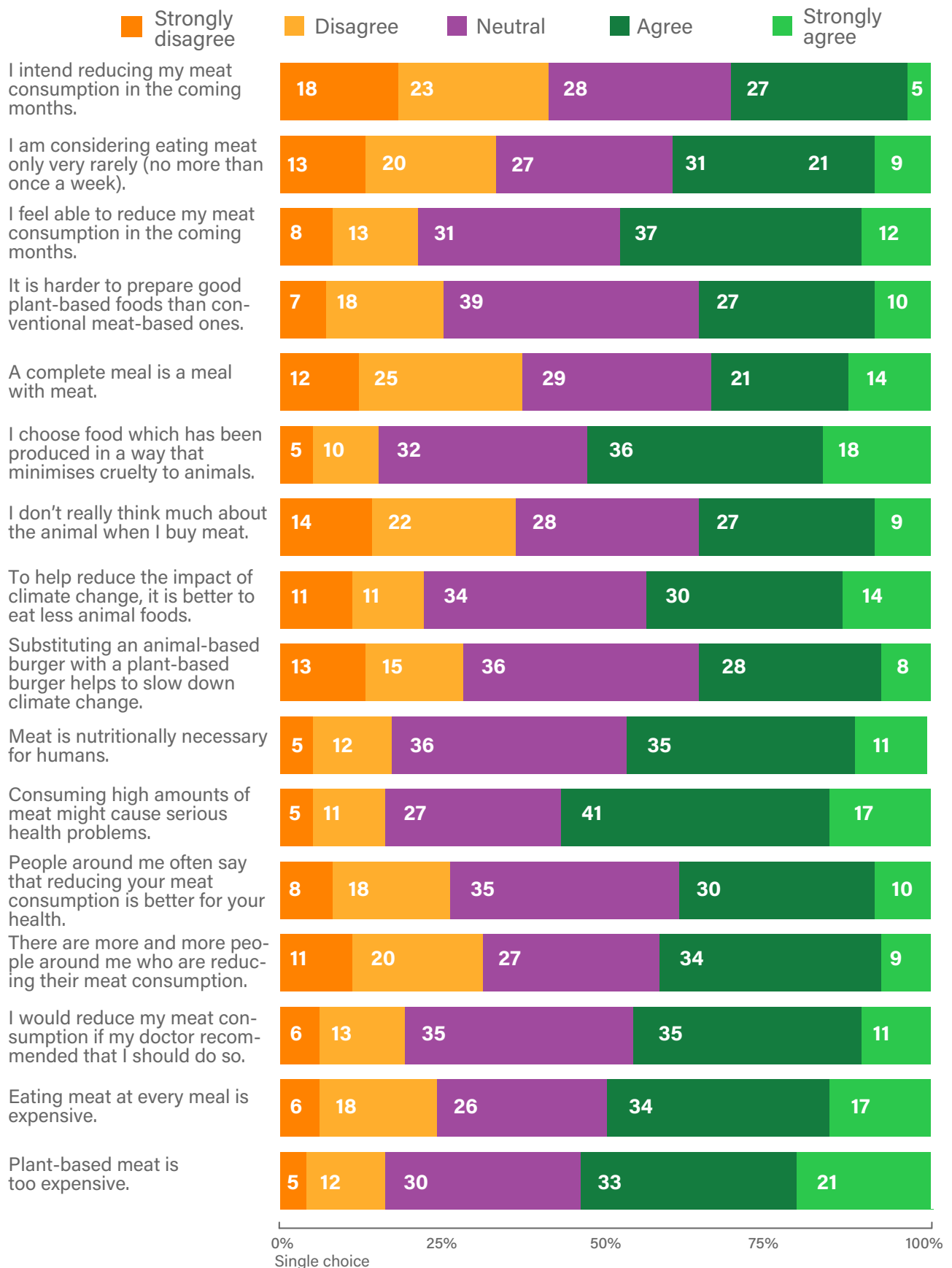
Q9

Please indicate how much you disagree or agree with each of the following statements with regards to barriers towards eating new plant-based food products and following a plant-based diet? (2/2)

German consumers say that plant-based food products are too expensive and that they need more information about it.



Q10 Please indicate how much you disagree or agree with each of the following statements concerning your assumptions about meat or plant protein?





Q11

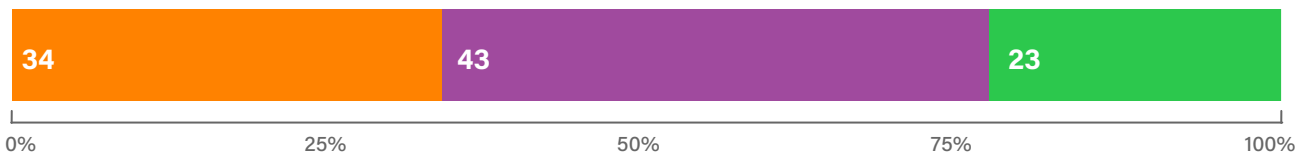
To what extent do you eat plant-based meat products (e. g. plant-based burger patties/nuggets) instead of conventional meat products?

More and more German consumers eat plant-based meat products instead of conventional meat products.

Slider 0-33%

Slider 34-66%

Slider 67-100%



Only people who eat plant-based meat answered this question.

Slider: 0% (I always eat conventional cheese products) - 100% (I always eat plant-based cheese products)

Q12

Imagine that plant-based meat has become widely available, tasty and affordable at grocery stores, restaurants, butchers, and markets. How likely are you to try plant-based meat?

45% of German consumers are likely to try plant-based meat.

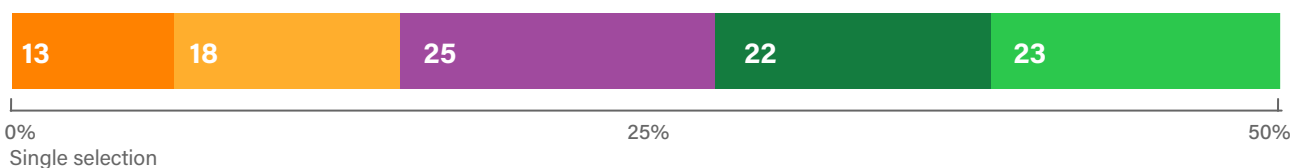
Not at all likely

Somewhat likely

Moderately likely

Very likely

Extremely likely



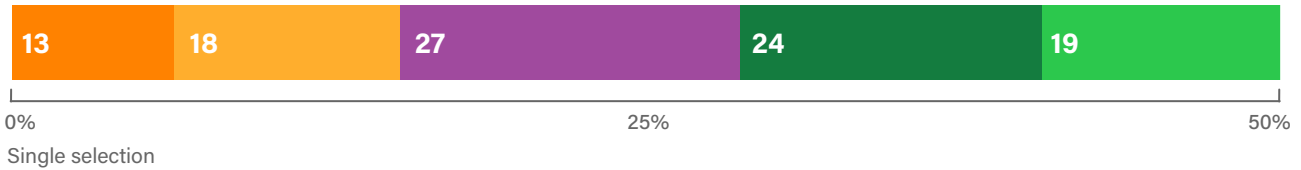
0%
Single selection

Q13 Imagine that you've had the opportunity to try a plant-based meat that has the identical taste and texture as animal-based meat.

■ Not at all likely
 ■ Somewhat likely
 ■ Moderately likely
 ■ Very likely
 ■ Extremely likely

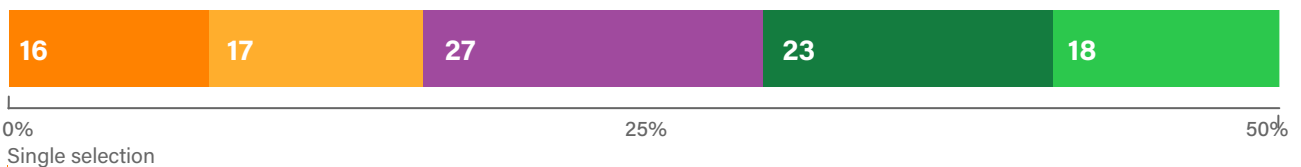
a How likely are you to eat plant-based meat instead of animal-based meat?

33% of German people are likely to eat plant-based instead of animal-based.



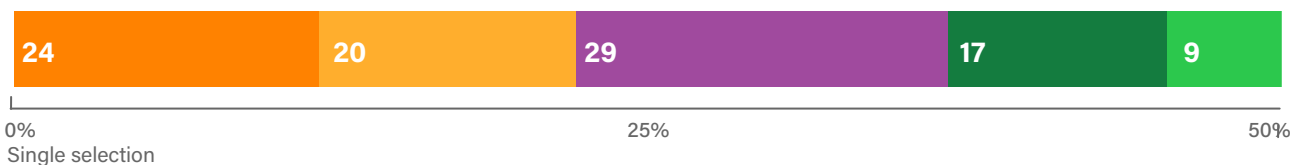
b How likely are you to purchase plant-based meat regularly?

41% of German people are likely to purchase plant-based meat regularly.



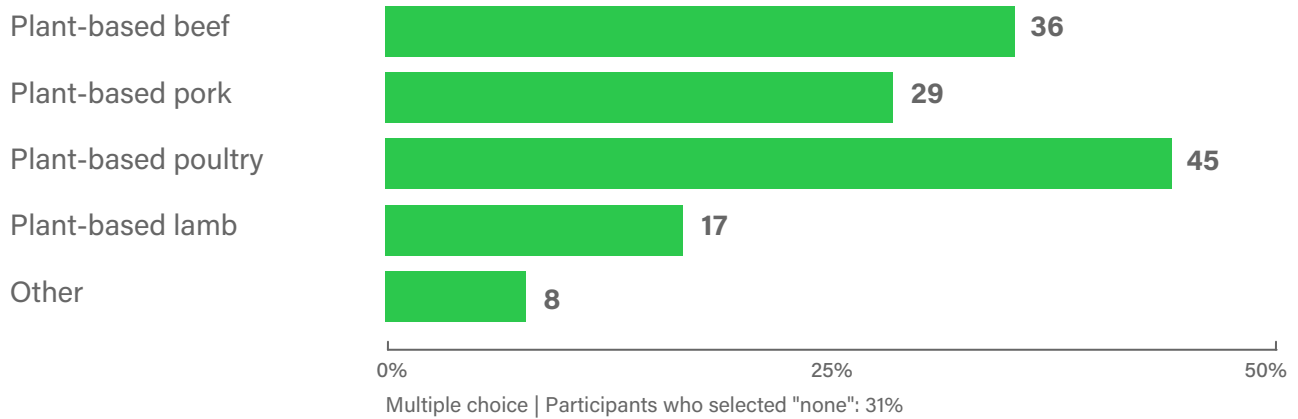
c How likely are you to pay a higher price for plant-based than for animal-based meat?

26% of German people are likely to pay a higher price for plant-based than for animal-based meat.



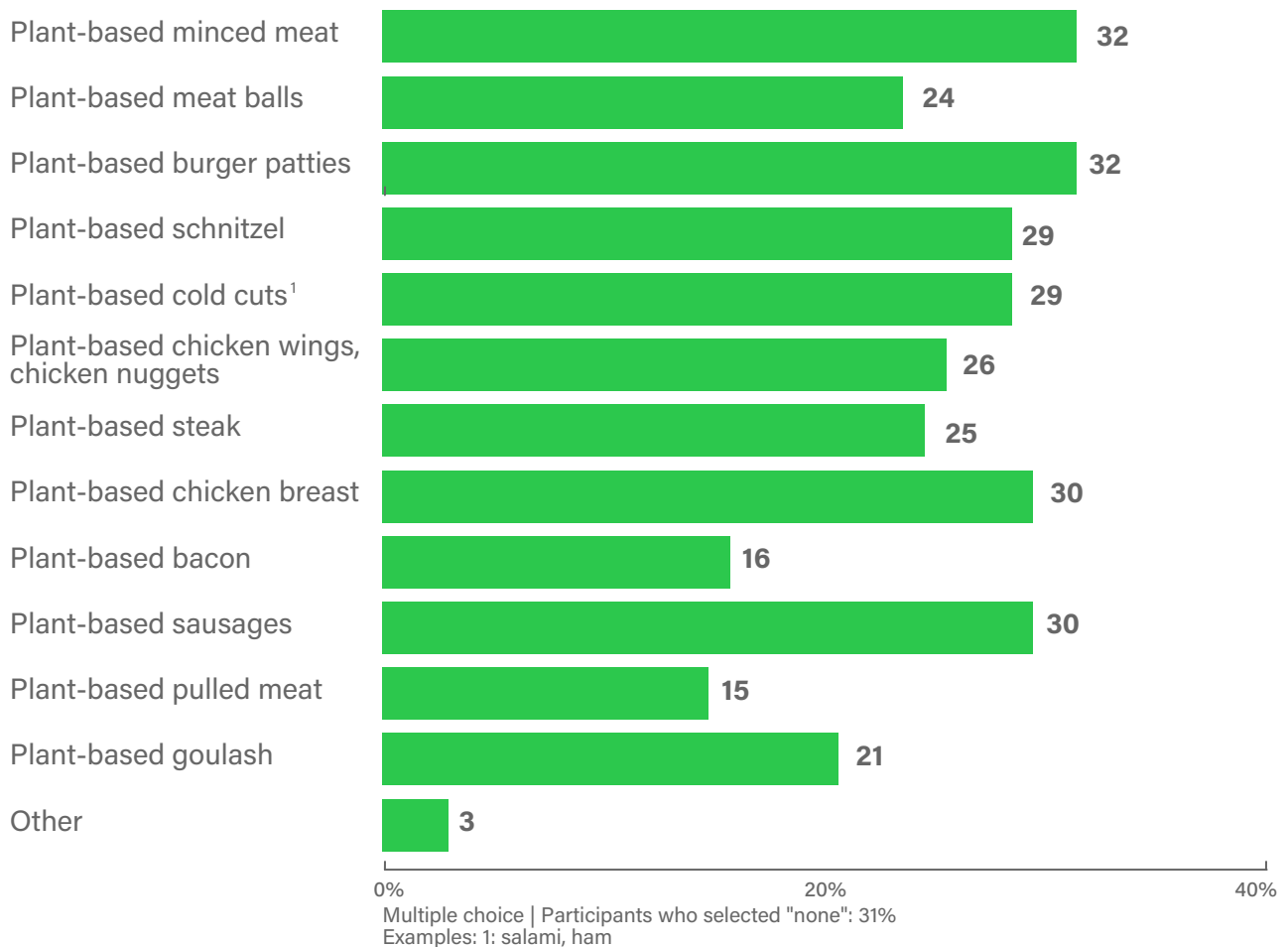
Q14 What kind of plant-based meat do you wish you could buy in the supermarket? Please select all the options that apply.

German consumers show a high demand for plant-based poultry products.



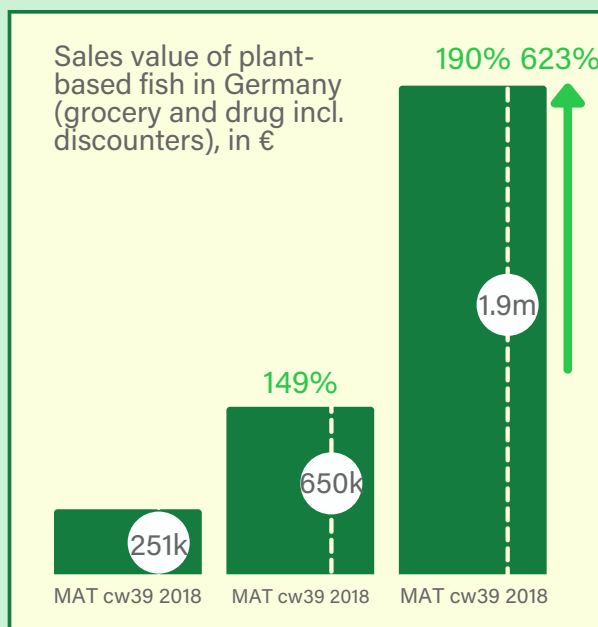
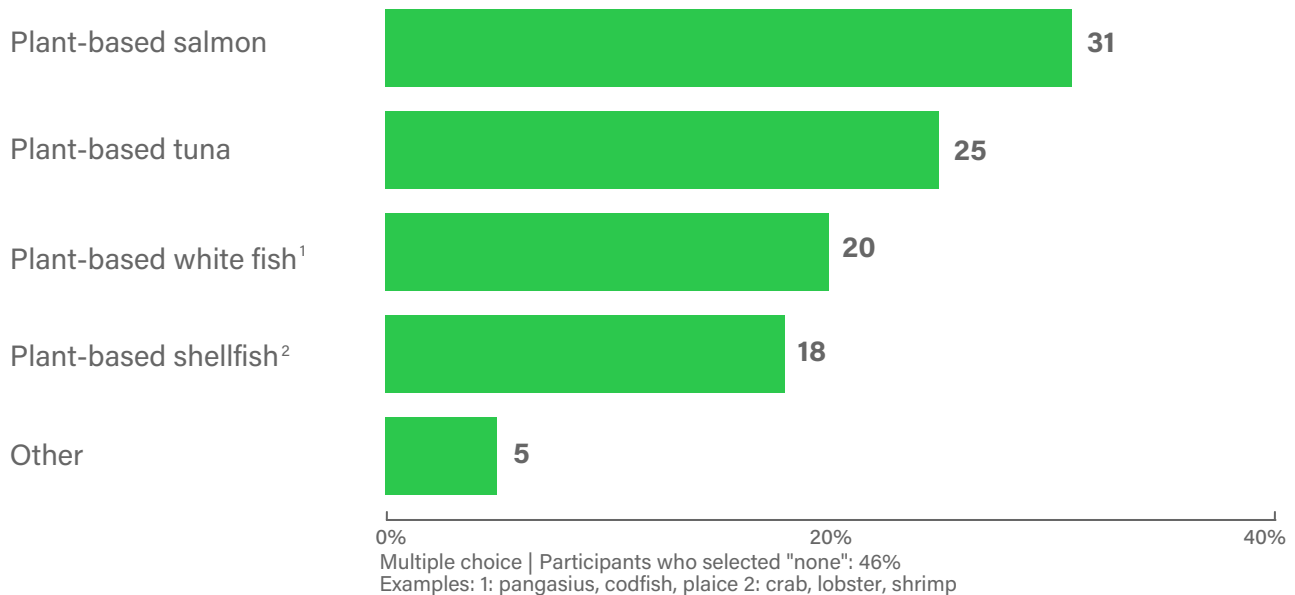
Q15 Specifically, what kind of plant-based meat products do you wish you could buy in the supermarket? Please select all the options that apply.

German consumers wish to buy plant-based minced meat, burger patties, chicken breasts, and sausages.



Q16 What kind of plant-based fish do you wish you could buy in the supermarket? Please select all the options that apply

In Germany, plant-based salmon is by far the most asked-for plant-based fish alternative.



Plant-based fish

Although sales volumes are still low, plant-based fish is the fastest-growing food category in Germany - which means that the sector has huge potential.

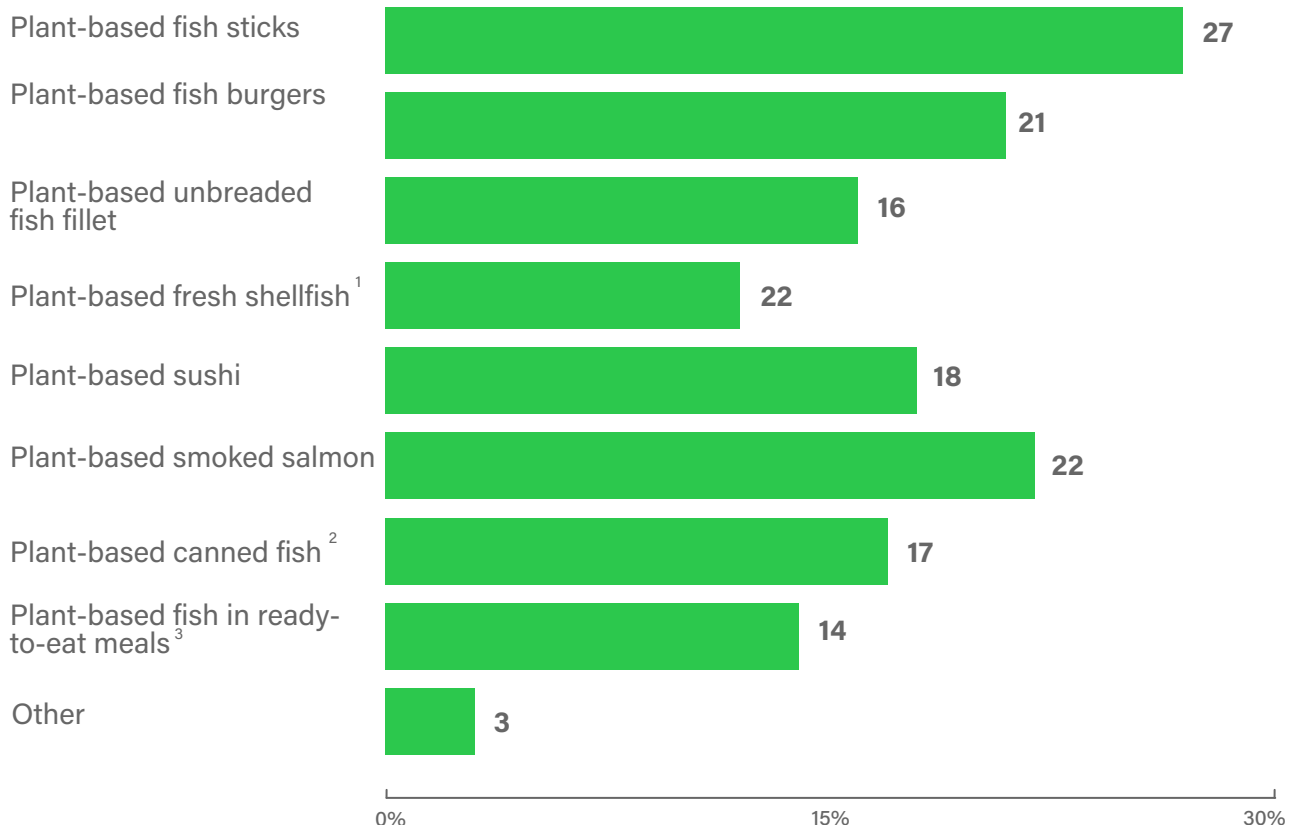
Sales in Germany experienced a tremendous increase, with a growth rate of 623% over the two periods and a sales value of €1.9m in the 2020 period.

During the second period, plant-based fish arrived on the shelves of discount stores, quickly generating 13% of total sales (€241k).



Q17 Specifically, what kind of plant-based fish products do you wish you could buy in the supermarket? Please select all the options that apply.

German consumers would like to see plant-based fish sticks, fish burgers, and smoked salmon in supermarkets.

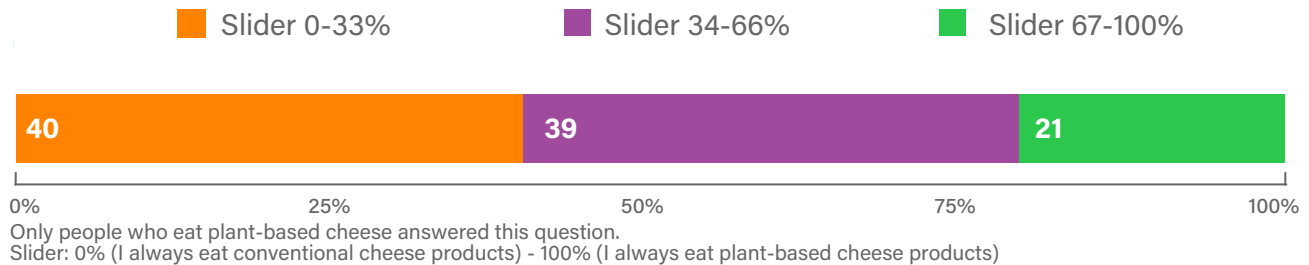


Multiple choice | Participants who selected "none": 47%

Examples: 1: lobster, scallop, shrimp 2: canned tuna 3: pasta with clams

Q18 To what extent do you eat plant-based cheese products (e. g. plant-based sliced cheese/grated cheese) instead of conventional cheese products?

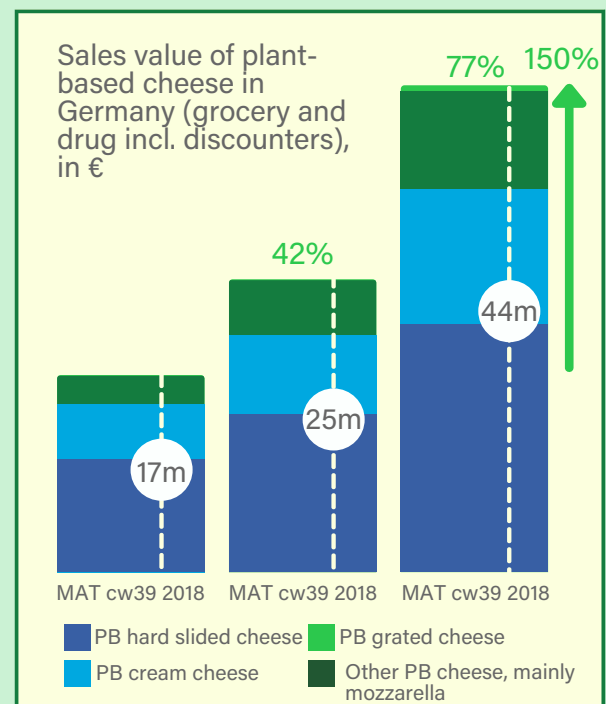
More and more German consumers eat plant-based cheese products instead of conventional cheese products.



Plant-based cheese

Plant-based cheese showed strong double-digit growth over the two periods, with sales value increasing from €17m to €44m and sales volume growing from 941k kg to 2.4m kg. The most sales were made with plant-based hard sliced cheese, followed by plant-based cream cheese and plant-based grated cheese. The category "other" experienced by far the strongest growth over the two periods, although it is still very small.

Only 6% of sales value and 7% of sales volume were made in discount stores over the last period. In MAT cw39 2018, just €5k's worth of plant-based cheese was sold in discount stores. However, sales increased tremendously in such stores so that €2.7m came from this channel in the last period, when categories other than plant-based hard sliced cheese entered discount stores for the first time.

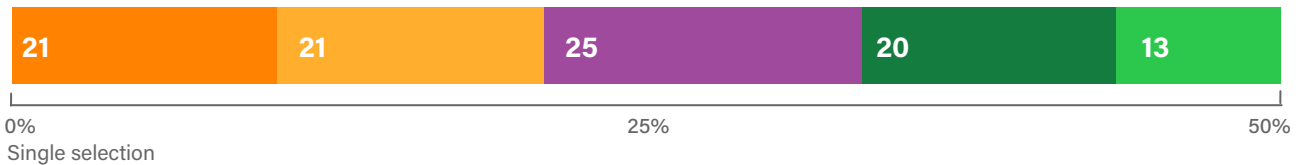


Q19 Imagine that you've had the opportunity to try plant-based cheese products, and the taste and texture were identical to conventional cheese products.

■ Not at all likely
 ■ Somewhat likely
 ■ Moderately likely
 ■ Very likely
 ■ Extremely likely

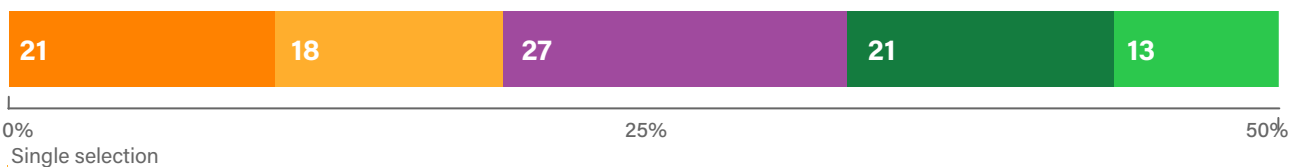
a How likely are you to eat plant-based cheese products instead of conventional cheese products?

33% of German consumers are likely to eat plant-based cheese instead of conventional cheese.



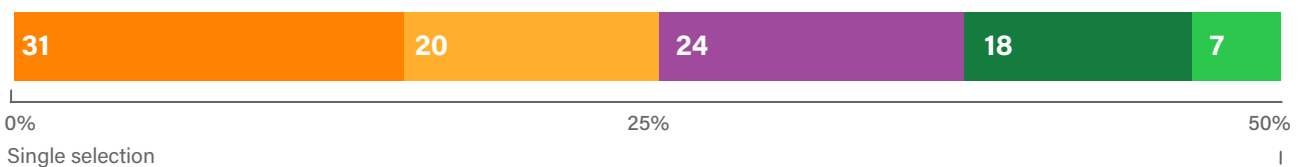
b How likely are you to purchase plant-based cheese products regularly?

34% of German consumers are likely to purchase plant-based cheese regularly.



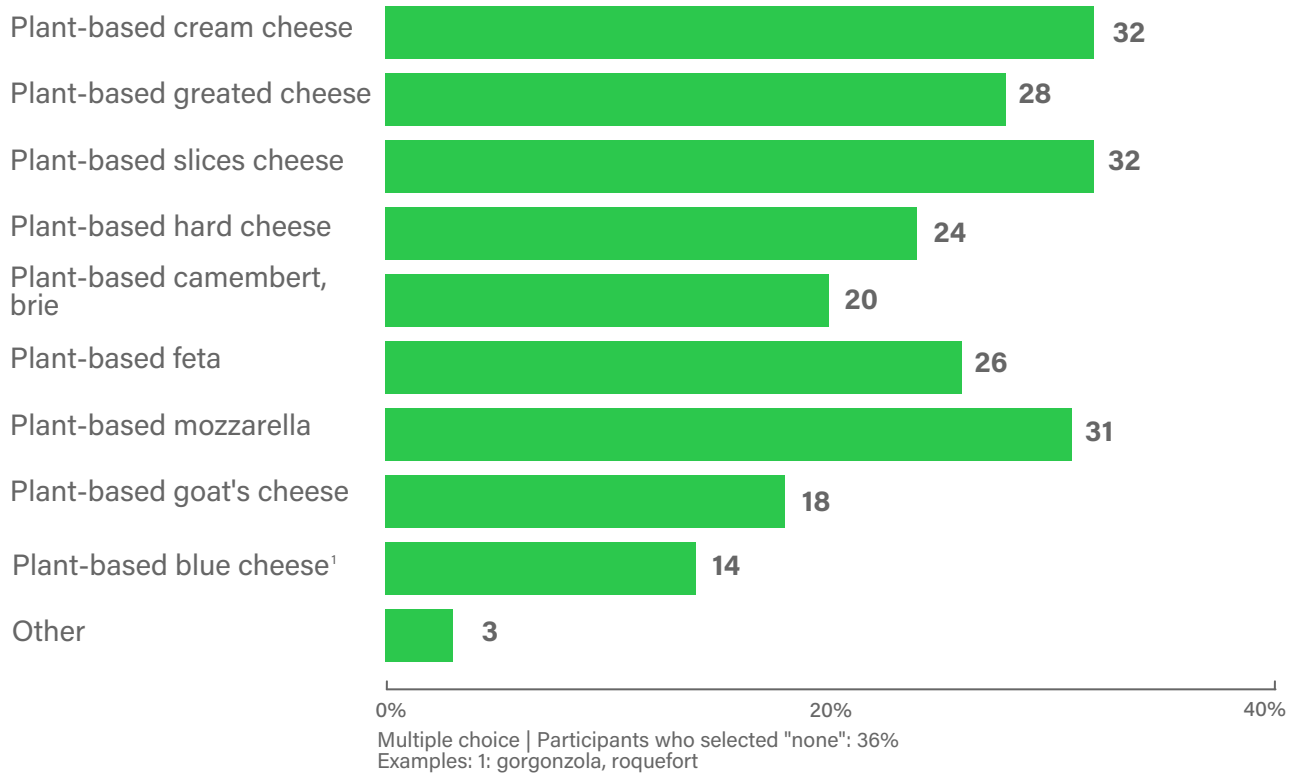
c How likely are you to pay a higher price for plant-based cheese products than for conventional cheese products?

25% of German consumers are likely to pay a higher price for plant-based cheese.



Q20 What kind of plant-based cheese products do you wish you could buy in the supermarket? Please select all the options that apply.

German consumers show high demand for plant-based cream cheese, sliced cheese, and mozzarella.

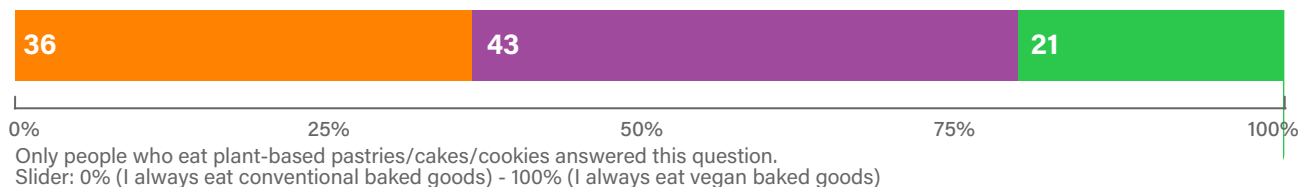




Q21 To what extent do you eat vegan baked goods (e. g. bread or cookies made without eggs or butter) instead of conventional baked goods?

More and more German consumers eat vegan baked goods instead of conventional baked goods.

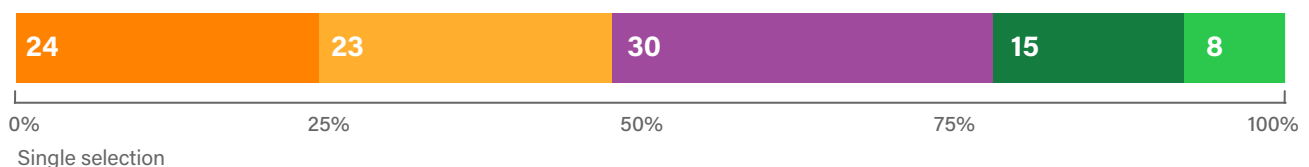
■ Slider 0-33%
 ■ Slider 34-66%
 ■ Slider 67-100%



Q22 How important is it for you that baked goods (e. g. bread or cookies) exclude animal-based ingredients such as eggs or butter?

German consumer think baked goods should exclude animal-based ingredients.

■ Not important at all
 ■ Somewhat unimportant
 ■ Neither important nor unimportant
 ■ Somewhat important
 ■ Very important

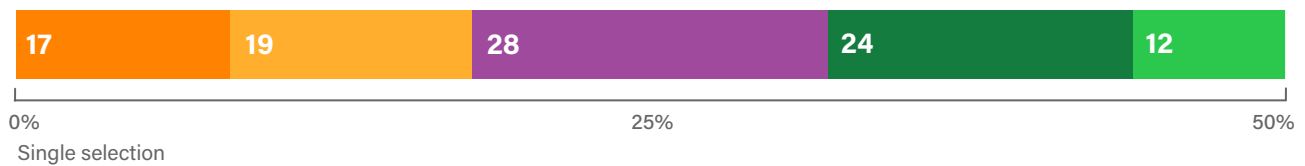


Q23 Imagine that you've had the opportunity to try vegan baked goods (e. g. bread or cookies made without eggs or butter) with exactly the same taste and texture as conventional baked goods.

■ Not at all likely
 ■ Somewhat likely
 ■ Moderately likely
 ■ Very likely
 ■ Extremely likely

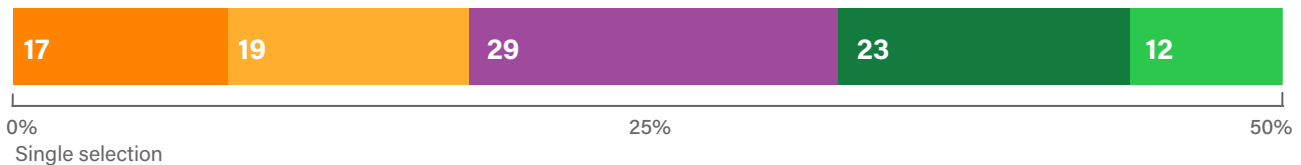
a How likely are you to eat vegan baked goods instead of conventional baked goods?

36% of Germans are likely to eat vegan instead of conventional baked goods.



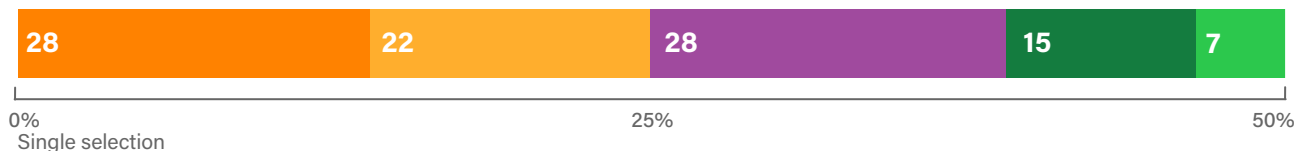
b How likely are you to purchase vegan baked goods regularly?

35% of Germans are likely to purchase vegan baked goods regularly.



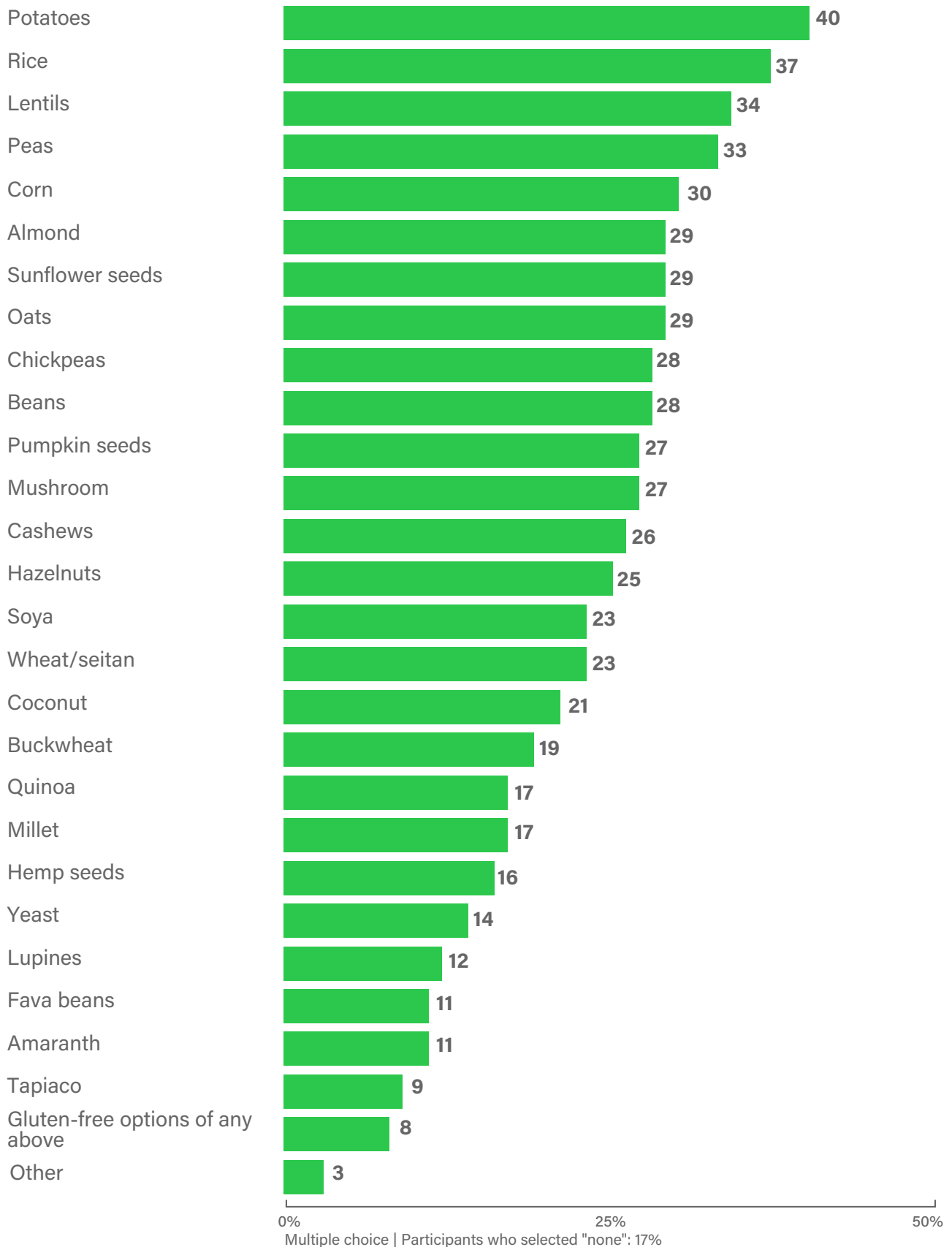
c How likely are you to pay a higher price for vegan baked goods instead of conventional baked goods?

22% of Germans are likely to pay a higher price for vegan baked goods.





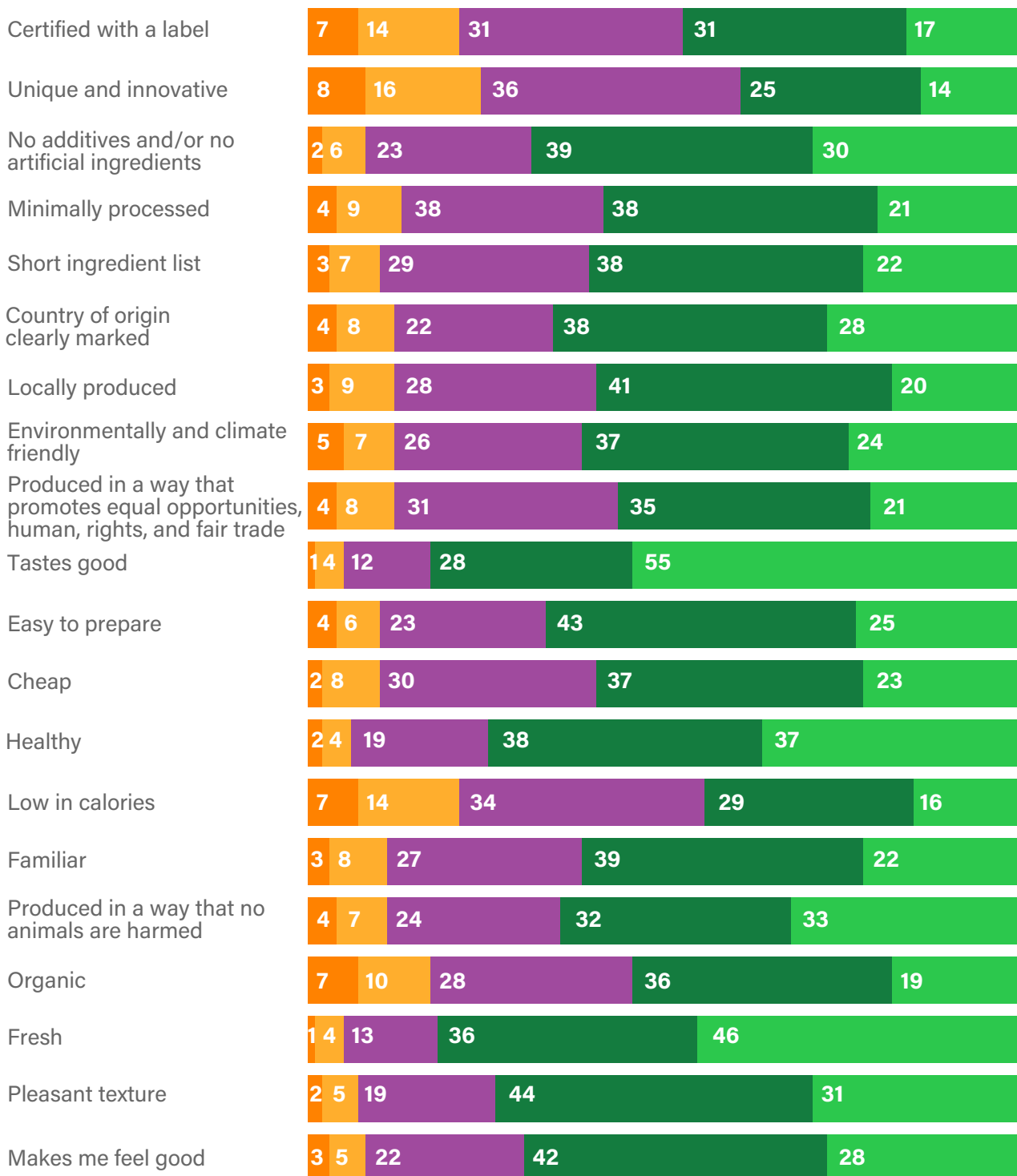
Q24 Which of the following would you like to have as a main ingredient in plant-based food? Please select all that apply.



Q25 What factors are important for you when choosing a food product? It is important to me that the food product I choose...:

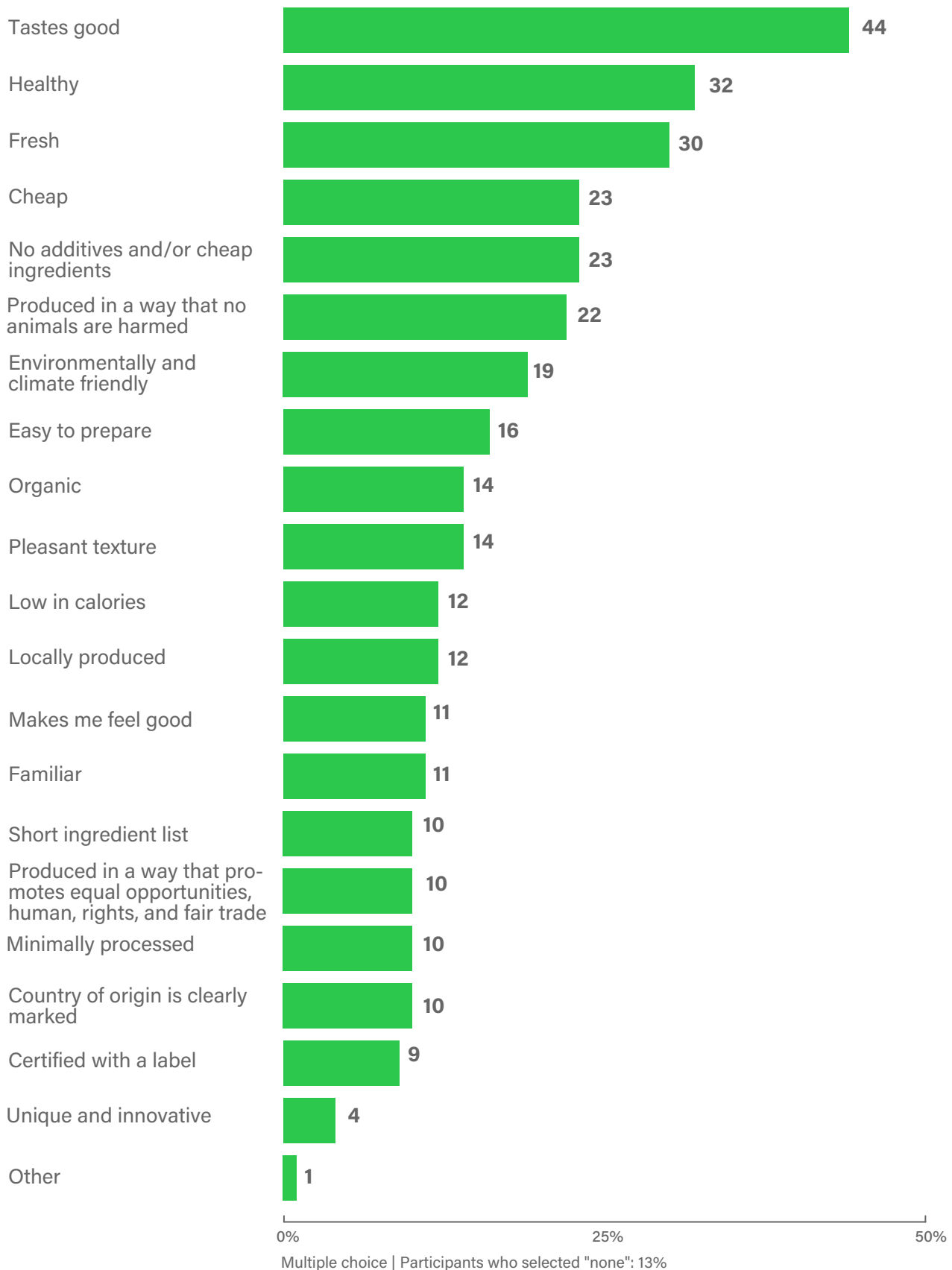
German consumers rate good taste and freshness as most important when choosing a food product.

■ Not important at all
 ■ Somewhat unimportant
 ■ Neither important nor unimportant
 ■ Somewhat important
 ■ Very important



0% 25% 50%
Multiple choice | Participants who selected "none": 13%

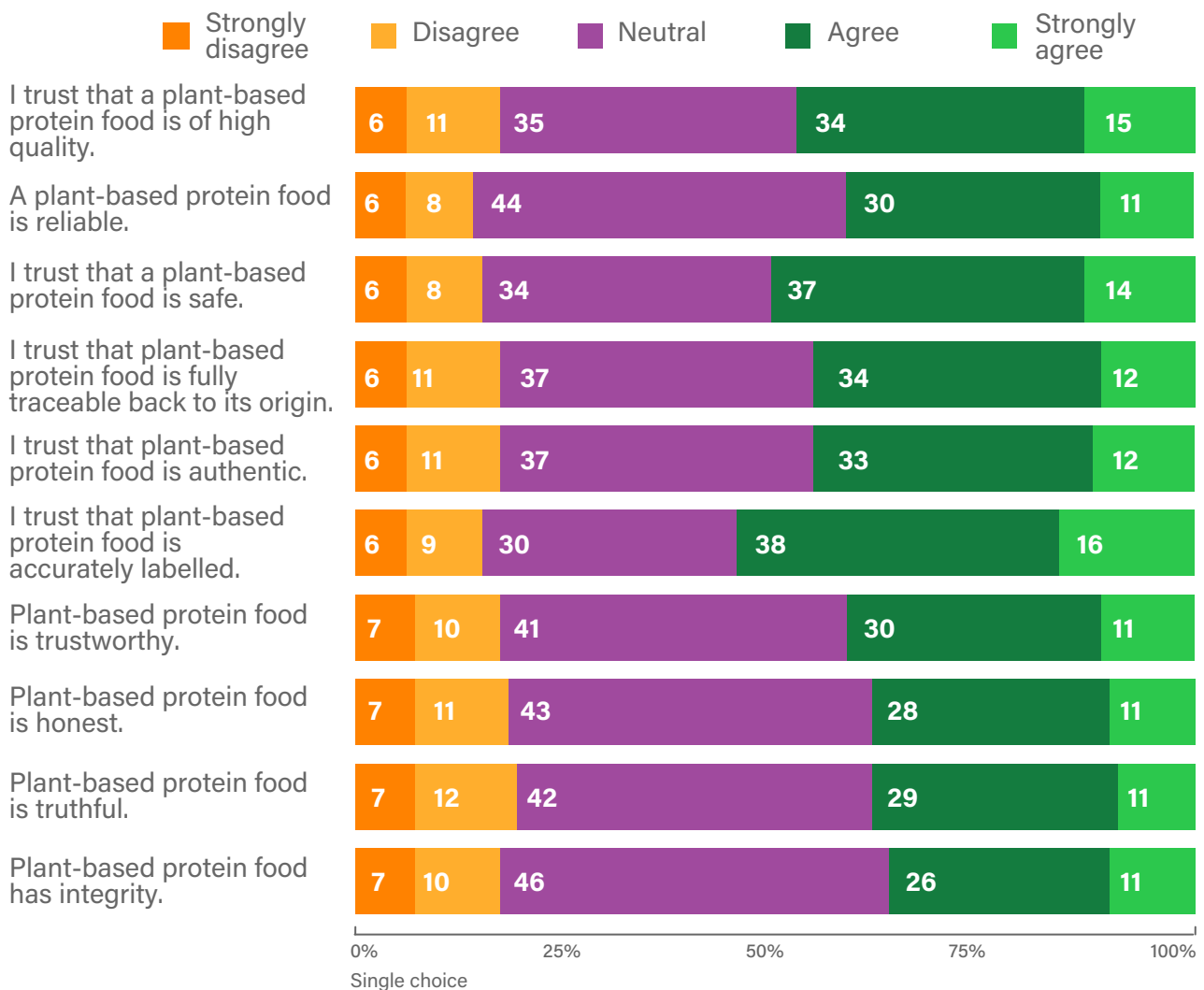
Q26 What are the most important factors when choosing a plant-based/vegan food product? Please select a maximum of five answers.





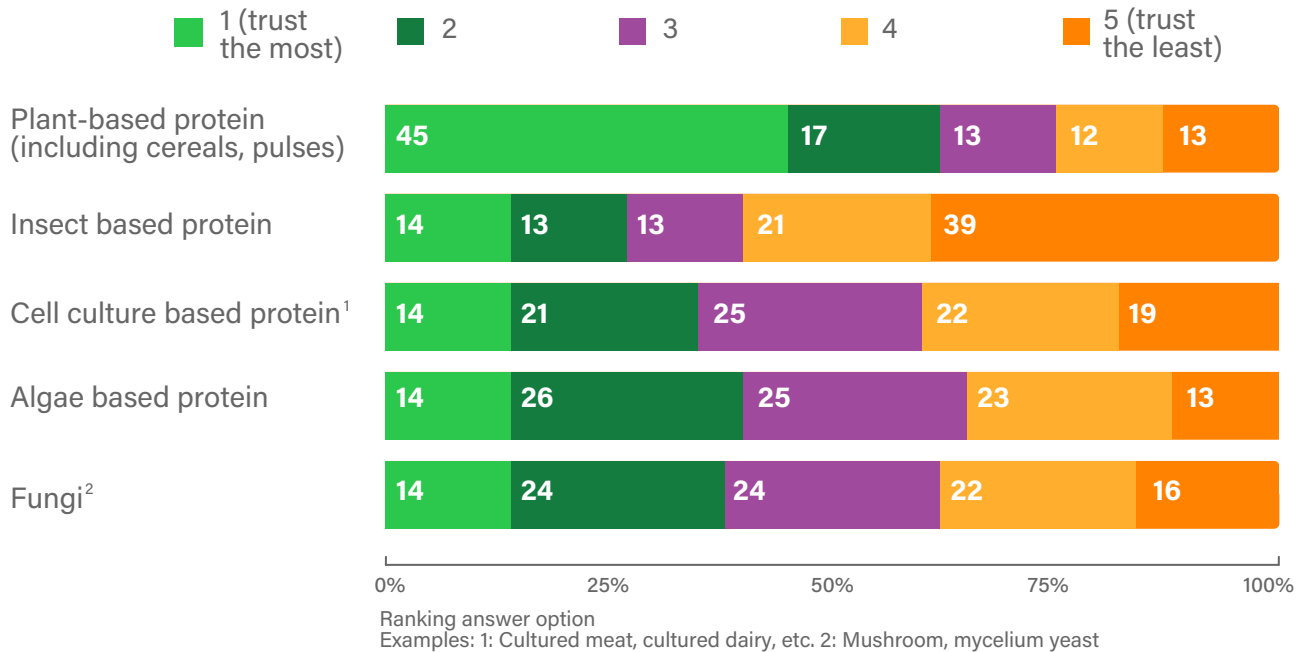
Q27 Please indicate how much you disagree or agree with each of the following statements with regards to trust towards foods based on plant protein (e. g. based on soy protein, pea protein etc.).

More than 50% of German consumers trust that plant-based protein food is accurately labelled and safe.



Q28 Which of the following alternative proteins do you trust the most? Rank them from 1 (trust the most) to 5 (trust the least).

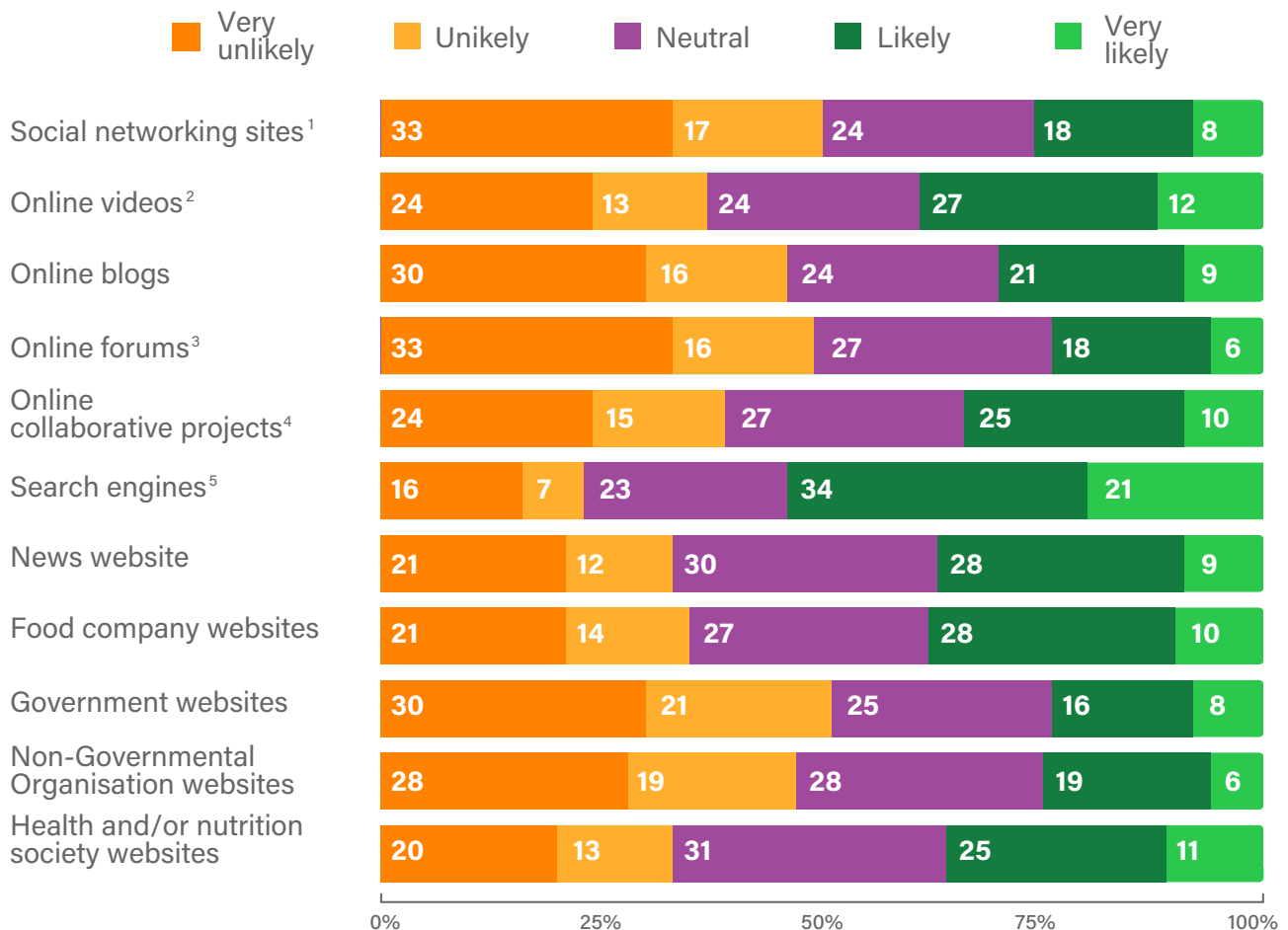
German consumers trust plant-based protein the most.





Q29 How likely would you be to use these online communication channels to find information about plant-based food products?

German consumers are most likely to use search engines to look for information on plant-based food products.

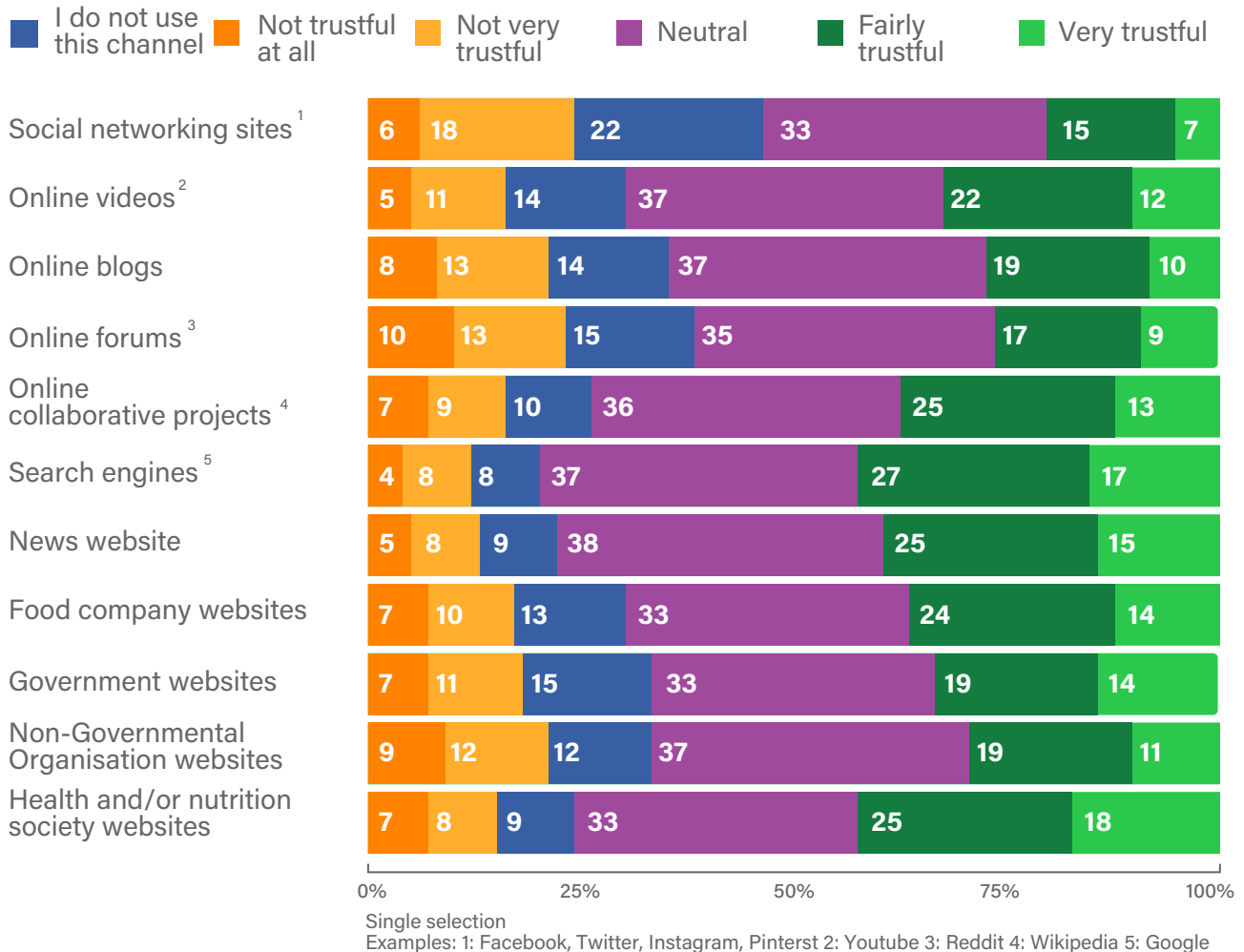


Single selection

Examples: 1: Facebook, Twitter, Instagram, Pinterest 2: Youtube 3: Reddit 4: Wikipedia 5: Google

Q30 In general, how much would you trust the information about plant-based food products from...?

German consumers trust search engines and health and nutrition-society websites the most.



ABOUT PROVEG

ProVeg is an international food awareness organisation working to transform the global food system by replacing conventional animal-based products with plant-based and cultured alternatives.

ProVeg works with international decision-making bodies, governments, food producers, retailers, investors, the media, and the general public to help the world transition to a society and economy that are less dependent on animal agriculture and more sustainable for humans, animals, and the planet.

As a leading NGO in the alternative-protein space, we have no commercial agenda. This allows us to provide objective expert advice and help support you successfully and effectively by harnessing the power and profitability of the shift to plant-based eating, in the most appropriate way for your business.

We work with companies along the entire value chain, which gives us unique insights into the key challenges, hurdles, and opportunities at every stage of the journey as you take your product to market.
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INFORM YOUR PRODUCT DEVELOPMENT STRATEGY

EXPAND AND IMPROVE YOUR PRODUCT OFFERING

EFFECTIVELY POSITION YOUR PRODUCTS

BROADEN YOUR REACH

SUPPORT YOUR CSR ACTIVITIES

MARKET RESEARCH RESOURCES

- Smart Protein project (2021): Plant-based foods in Europe: How big is the market? The Smart Protein Plant-based Food Sector Report. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <https://smartproteinproject.eu/plant-based-food-sector-report/> (last accessed 10.01.2022).
- Smart Protein project/ProVeg (2021): Plant-based foods in Europe: How big is the market? The Smart Protein Plant-based Food Sector Report. Webinar slides and recording. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <https://proveg.com/what-we-do/corporate-engagement/plant-based-food-sector-report/> (last accessed 10.01.2022).

CONSUMER RESEARCH RESOURCES

- Smart Protein project (2021): What consumers want: A survey on European consumer attitudes towards plant-based foods. Country specific insights. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <https://smartproteinproject.eu/consumer-attitudes-plant-based-food-report/> (last accessed 10.01.2022).
- Smart Protein project (2021): What consumers want: a survey on European consumer attitudes towards plant-based foods, with a focus on flexitarians. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <https://smartproteinproject.eu/consumer-attitudes-plant-based-food-report/> (last accessed 10.01.2022).
- Smart Protein project/ProVeg (2021): What consumers want: a survey on European consumer attitudes towards plant-based foods, with a focus on flexitarians. Webinar slides and recording. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <https://proveg.com/what-we-do/corporate-engagement/consumer-attitudes-plant-based-food-report/> (last accessed 10.01.2022).

Suggested citation

ProVeg (2022): Plant-based food in Germany. market and consumer insights. Based on research from the Smart Protein project, a European Union's Horizon 2020 research and innovation programme (No 862957).

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Date of publication:

24.02.2022

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