Research report: **Germany**
May 2025

Understanding plant-based category dynamics, motivations and consumers

About Plant Futures, HarrisX and GFI Europe

This research has been designed, funded and conducted jointly by Plant Futures Collective, HarrisX and the Good Food Institute Europe.

plantfutures. COLLECTIVE

The Plant Futures Collective is a leading UK consultancy and insights partner for plant-based food businesses, building collective action to accelerate the shift toward healthier, more sustainable diets.

harrisx A STAGWELL COMPANY

HarrisX is a global market research, data analytics, and strategy consulting company that leverages cutting-edge technology, data and creativity to drive strategic growth.

gfi Europe

The Good Food Institute Europe is a nonprofit and think tank helping to build a more sustainable, secure and just food system by diversifying protein production. We champion the science, policies and investment needed to make alternative proteins delicious, affordable and accessible across Europe.

About the German plant-based market: **Why is this research important?**

Germany's plant-based market is the largest in Europe and is continuing to grow, driven by strong sales of relatively cheap private-label products.

In Germany, many larger established food companies – including those selling conventional meat – have expanded their portfolio to include plant-based products, either under their own brand or by establishing subsidiaries.

Availability of plant-based options has increased, with all major German supermarkets and discounters now selling plant-based products. Various fast-food chains and foodservice outlets have also introduced plant-based dishes to their menus.

This research aims to explore current and intended consumption patterns, assess how plant-based foods and animal meat and dairy are perceived across a range of factors, and identify groups of consumers who want to reduce their animal meat and dairy consumption and/or eat more plant-based foods. Furthermore, with Germany offering a plant-based success story, the insights from this research may help to support the transition towards plant-based foods in other countries, too.

What's included in this report:

Research Details:

10-minute online survey conducted between 3 December 2024 and 17 December 2024

2,433 respondents in the **Germany**, split as follows:

- n=1,096 Nationally Representative (Nat Rep) of the German's adult population (18+)
  Sample is nationally representative by age, gender, income, ethnicity, and region

- n=1,337 additional plant-based consumers
  *Classified as having consumed at least one plant-based subcategory** in the last month*
  Sample is representative of the demographic profile derived from the Nat Rep sample

The total sample is weighted** to accurately represent the incidence of plant-based consumers (% of population who have consumed at least one plant-based subcategory in the last month) within the nationally representative adult population to ensure we are not over-representing plant-based consumers.

***Note: the unweighted base sizes are displayed on each page. Please refrain from using these figures for any calculations.*

1. Category Dynamics

Category dynamics:
Summary & implications

What have we learnt?

47% of German adults report either actively reducing or removing meat from their diets. Although only 5% follow vegetarian or vegan diets, flexitarian eating is widespread (39%) and 60% of Germans report having consumed at least one plant-based subcategory in the last month. Diets are often flexible, with vegetarians/vegans occasionally having consumed meat over the past year.

A broad shift in food culture appears to be happening in Germany. For most animal-based categories, there is a net reported reduction in consumption frequency over the last year, particularly for red meat – which less than half of Germans claim to consume weekly. Changing taste preferences are the top driver of animal meat and dairy reduction, followed by cost and health. There is also positive momentum among current plant-based consumers, who report an overall increase in their consumption across all but one subcategories in the last year.

The youngest generation (18-24) is more likely to identify as an omnivore or heavy meat eater, suggesting a possible slowing of the wave of plant-based popularity (see the Addendum for further details).

Nevertheless, a significant proportion of German adults claim they intend to increase their consumption of plant-based foods (38%) and/or intend to reduce animal-based products (34%).

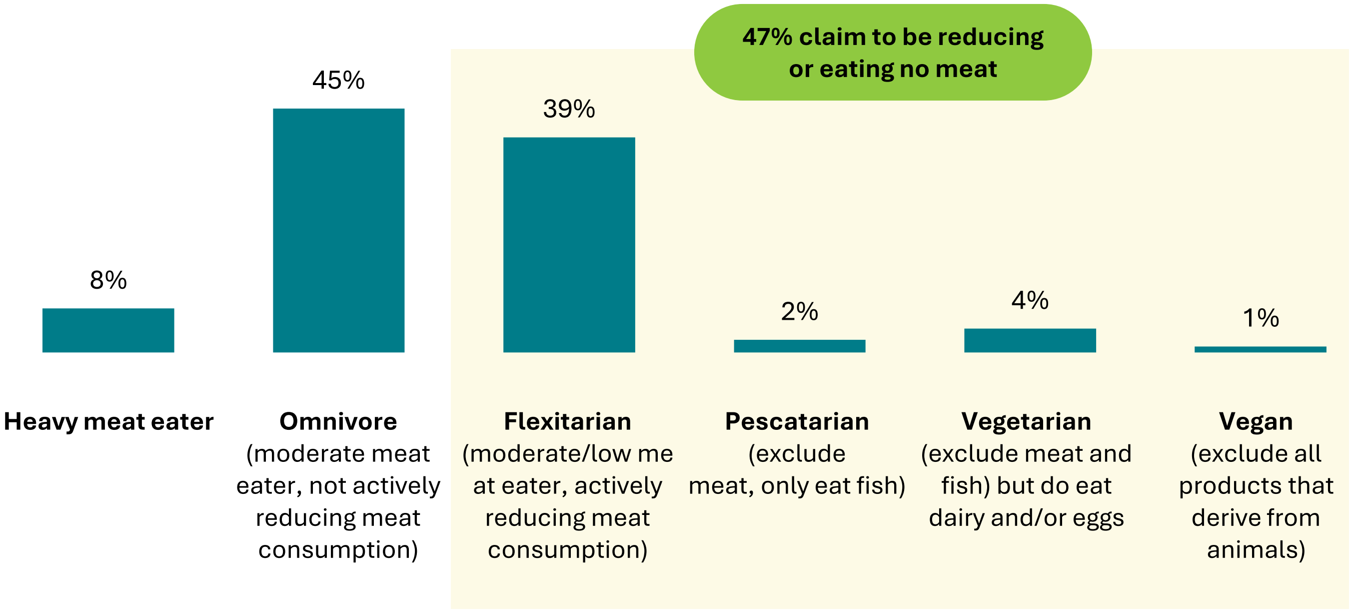
Implications

- To reach the large flexitarian market as well as meat-eaters who eat plant-based foods, there is an opportunity for plant-based brands to make their marketing and visual identity **welcoming to all dietary groups**.
- Many potential consumers of plant-based products also consume animal-based foods. Plant-based brands can consider **framing plant-based foods as complementary to animal-based foods** instead of using narratives about eliminating animal meat and dairy consumption.
- Plant-based meat consumption is more common among people who report reducing their red meat consumption, suggesting that there is an opportunity for brands to cater to the needs of this group by providing **plant-based versions of red meat products** such as sausages, mince and steak.
- Since self-reported eating patterns and intention to change do not always match actual current and future behaviour, it is also important to understand the **underlying motivational drivers of change** – which the next section of this report explores.

47%

of the German population report following diets that are either reducing or contain no meat.

Current diet (claimed/self-identified)
Among the total DE adult population, based on descriptions below



- 53% are heavy meat eaters/omnivores (not actively reducing meat).
- 39% are flexitarians (actively reducing meat consumption).
- 2% are pescatarians, 4% are vegetarians and 1% are vegans.
- The youngest generation surveyed (18-24 years old) is less likely to be vegan/ vegetarian or flexitarian/pescatarian than those aged 25-34, and slightly more likely to be an omnivore or heavy meat eater. See the Addendum for more details.
- The high prevalence of flexitarian eating aligns with similar research from BMEL (2024), although that source shows higher proportions of vegetarians and vegans.

Most German adults report having consumed at least one animal-based subcategory in the last week.

- Dairy and egg consumption are most common.
- Self-identified flexitarians are most distinct from omnivores in relation to their red meat consumption (61% in the last month for flexitarians vs 81% for omnivores).

Are diets more fluid than we might think?

Dietary definitions are not always rigidly applied. This research found that a small minority of vegetarians report eating some meat, and a minority of vegans report eating some meat and/or dairy.

Claimed incidence of animal-based subcategory consumption

Among the total DE adult population

Type of animal-based food	In the last 12 months	In the last month	In the last week
At least one animal-based subcategory	**99%**	**96%**	**94%**
Dairy (eg, cheese, butter etc)	89%	80%	72%
Eggs (from chickens, ducks, etc)	90%	79%	66%
White meat (eg, chicken, turkey, etc)	83%	72%	56%
Milk (eg, cow milk, goat milk, etc)	82%	71%	60%
Red meat (eg, beef, pork, lamb, etc)	78%	67%	49%
Dairy-based desserts (eg, chocolate, cookies, ice cream)	83%	67%	50%
Fish or seafood (eg, salmon, mussels, etc)	74%	57%	35%

B1/2/3. In the last 12 months/ month/ week, which of the following items have you eaten or drunk...?
Unweighted N = 2,433

60%

of German adults report plant-based consumption in the previous month, demonstrating further room for growth.

- Monthly penetration is highest for vegetable-based meals at 34%, followed by plant-based milk at 30%, and plant-based meat at 25%.
- Weekly consumption of plant-based subcategories is low (at most 20% for vegetable-based meals).

Claimed incidence of plant-based subcategory consumption

Among the total DE adult population

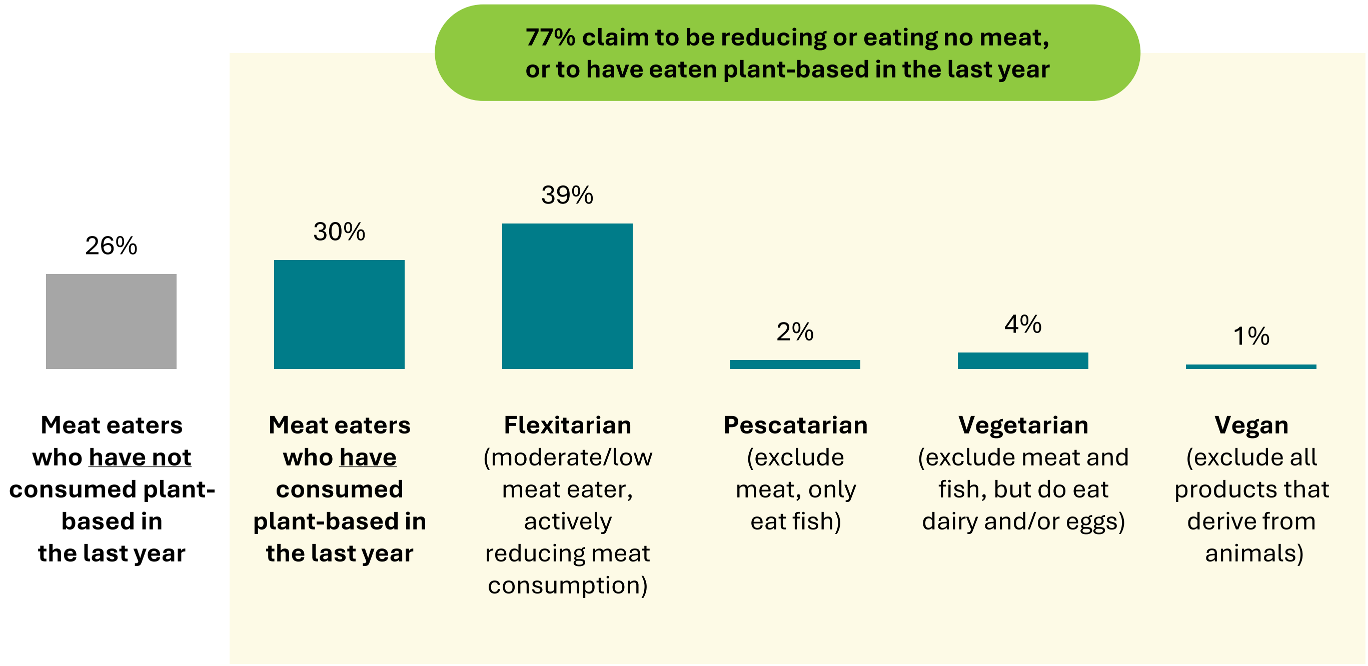
Type of plant-based food	In the last 12 months	In the last month	In the last week
At least one plant-based subcategory	**69%**	**60%**	**47%**
Vegetable based meals (eg, made with falafel, lentils, chickpeas, beans, etc)	46%	34%	20%
Plant-based milk (eg, oat milk, almond milk, soy milk, etc)	42%	30%	21%
Plant-based meat (eg, alternatives to chicken, mince, burgers/sausages, etc)	37%	25%	16%
Plant-based dairy (eg, alternatives to cheese, yoghurt, etc)	29%	19%	11%
Plant-based desserts (eg, alternatives to chocolate, cookies, ice cream, cakes, etc)	29%	19%	12%
Tofu, seitan, tempeh	24%	15%	8%
Plant-based fish/seafood (eg, alternatives to salmon, sushi, etc)	20%	12%	7%
Plant-based eggs / egg alternatives	14%	7%	4%

B1/2/3. In the last 12 months/ month/ week, which of the following items have you eaten or drunk…?
Unweighted N = 2,433

The size of the potential consumer base for plant-based foods increases to 77% when including meat eaters who also report consuming plant-based in the last year.

- In the past year, 56% of all heavy meat eaters/omnivores have consumed at least one plant-based subcategory.
- This shows that the potential market for plant-based foods extends even further than self-identified flexitarians.

Current self-identified diet & reported plant-based consumption in the last year
Among the total DE adult population



B8. How would you best describe your diet?
Unweighted N = 2,394

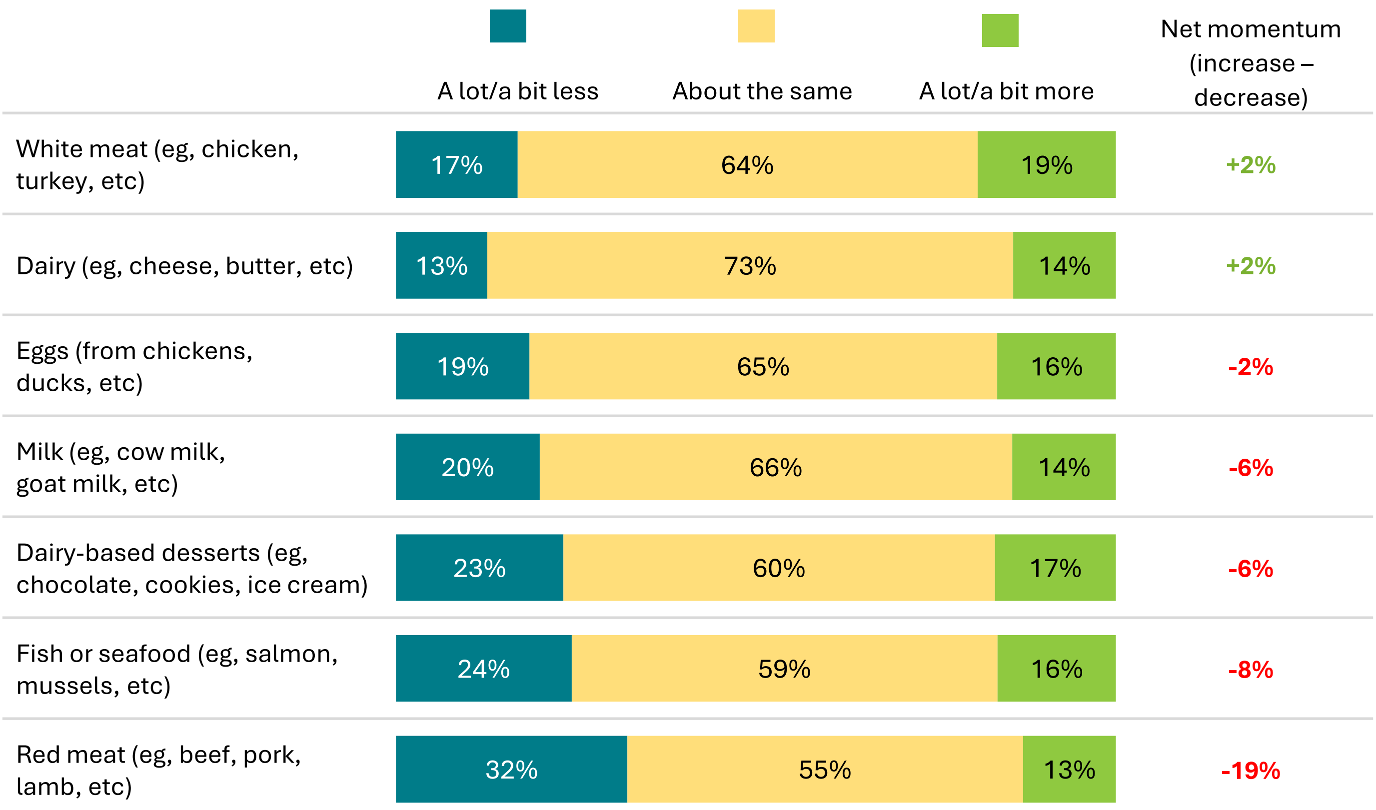
32% of German adults report eating red meat less often than a year ago, with only 13% eating more.

- There has also been a net decrease in reported consumption frequency for fish or seafood, dairy-based desserts, milk and eggs.
- White meat and dairy saw a small net increase in reported consumption frequency.
- However, most people report no change in their consumption frequency of animal-based foods over the last year.

Are consumers substituting red meat with plant-based meat?

40% of red meat 'reducers' have consumed plant-based meat in the last year, compared to just 34% for people who have not reduced their red meat consumption.

Claimed change in consumption frequency of animal-based subcategories over the last 12 months Among DE adults who have consumed each subcategory within the last 12 months



B4. How has the frequency at which you have eaten/drunk the following changed over the last 12 months?
Minimum base size of 1,822.

The main reasons for reducing animal meat and dairy are linked to taste preferences, cost and health.

- Changing taste preferences are top, indicating a broad shift in food culture occurring in Germany.
- Cost – related to the price of meat and dairy in the context of the rising cost of living – is another key reason for meat and dairy reduction.
- Many consumers who have reduced their meat and dairy cite reasons related to various aspects of health.

Reasons for reducing animal-based category consumption over the last 12 months (coded verbatim)
Among DE adults who reduced their consumption of animal-based foods within the last 12 months

Related to health

Taste preferences	Changing taste preferences	26%
Cost	Cost of animal-based food and drink in the rising cost of living	23%
Health	Healthier lifestyle and diet	17%
Ethical concerns	Animal welfare and ethical treatment in farming	10%
Lifestyle changes	Shift to vegetarian/vegan diets, dietary experimentation	8%
Environmental concerns	Environmental impact of animal-based food production	6%
Medical conditions	Managing health conditions (eg, diabetes, high cholesterol)	6%
Weight management	Managing weight, reducing calorie intake	3%
Availability	Changes in produce availability	2%
No specific reason	No reason given	9%

B7. You have told us that you have been eating less of the following animal-based products over the last 12 months. Please tell us in your own words why this is? Unweighted N = 1,264

Among plant-based consumers, there has been positive momentum in claimed consumption patterns over the last year.

- Consumers of plant-based foods report a net increase in consumption over the last 12 months – consistent with rising retail sales in most categories.
- However, a large minority also report decreasing consumption during that time.
- Some of the increases will be driven by trial by new consumers. The numbers do not capture lapsed consumers who reduced consumption to zero in the last year.

Claimed change in consumption frequency of plant-based subcategories over the last 12 months
Among DE adults who have consumed each subcategory within the last 12 months

Type of plant-based food	A lot/a bit less	About the same	A lot/a bit more	Net momentum (increase – decrease)
Plant-based milk (eg, oat milk, almond milk, soy milk, etc)	21%	41%	38%	+16%
Plant-based dairy (eg, alternatives to cheese, yoghurt, etc)	20%	46%	33%	+13%
Plant-based meat (eg, alternatives to chicken, mince, burgers/sausages, etc)	21%	45%	34%	+13%
Vegetable based meals (eg, made with falafel, lentils, chickpeas, beans, etc)	20%	50%	30%	+11%
Plant-based eggs/egg alternatives	27%	39%	34%	+7%
Plant-based desserts (eg, alternatives to chocolate, cookies, ice cream, cakes, etc)	24%	45%	30%	+6%
Tofu, seitan, tempeh	24%	47%	30%	+6%
Plant-based fish/seafood (eg, alternatives to salmon, sushi, etc)	28%	43%	28%	0%

B4. How has the frequency at which you have eaten/drunk the following changed over the last 12 months?
Minimum base size of 496.

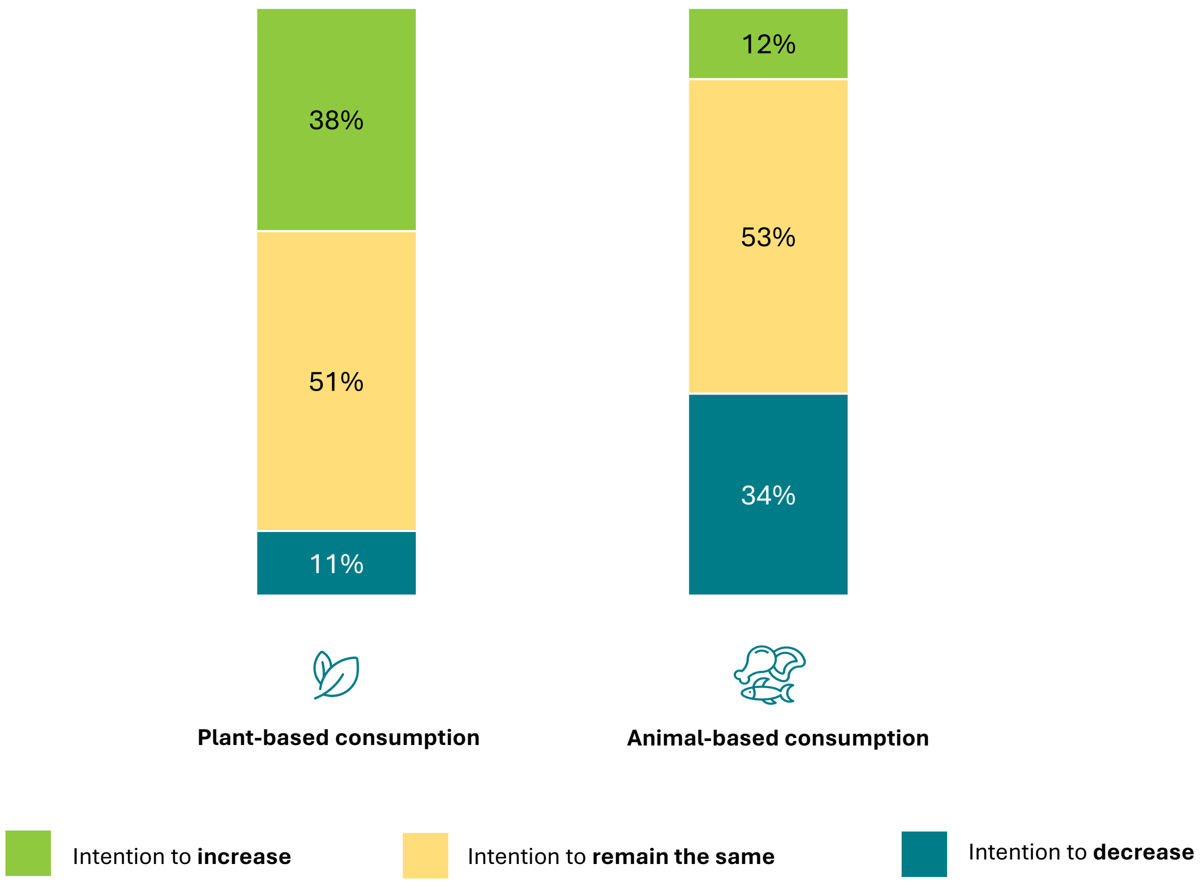
Claimed intentions among German adults point to a willingness to increase consumption of plant-based and reduce animal meat and dairy.

- 34% of German adults intend to decrease their animal meat and dairy consumption.
- 38% of German adults intend to increase their plant-based food consumption.

Watch out! We know claimed intention doesn't always lead to actual behaviour changes.

The value-action gap means that while consumer intention might be there, it doesn't guarantee behaviours always follow intentions. However, intentions nevertheless demonstrate the potential for growth in the plant-based market.

Overall intention to increase/decrease animal-based and plant-based consumption
Among the total DE adult population



C1. Firstly, are you looking to decrease or increase the amount of plant-based foods you consume? C3. Firstly, are you looking to decrease or increase the amount of animal meat and dairy you consume? Unweighted N = 2,433

2. Consumer, Capability, Opportunity & Motivation

What is the **COM-B model** and how have we applied it as part of this research?

What is the COM-B model?

The COM-B model is a framework for understanding behaviour change. It identifies three essential components that must be present for any behaviour to occur. These are:

- **Capability (C):** The individual's ***physical*** and ***psychological*** ability to perform the behaviour in question.
- **Opportunity (O):** The ***social*** and ***physical*** external factors that make the behaviour in question possible.
- **Motivation (M):** The internal processes that direct and encourage the behaviour, including both ***reflective*** (conscious) and ***automatic*** (unconscious) motivations.

These components interact to influence behaviour, making the COM-B model a comprehensive tool for designing interventions aimed at behaviour change.

How has it been applied in this research?

The two **behaviours (B)** we're interested in are the intent to increase the consumption of plant-based foods and the intent to reduce consumption of animal meat and dairy.

Existing research and knowledge was consolidated to create a longlist of attributes that fall under each of the COM-B components.

There were 16 COM-B questions asked about plant-based foods, and 16 about animal meat and dairy foods. The questions about animal meat and dairy mirrored the questions asked about plant-based foods so we could make direct comparisons.

Understanding plant-based and animal-based foods through this COM-B lens can help identify interventions that could increase the behaviours we're interested in.

Consumer capability, opportunity and motivation:
Summary & implications

What have we learnt?

Capability, opportunity and motivation factors are generally rated higher for animal meat and dairy than for plant-based foods – which is to be expected, since animal-based foods are still well entrenched in German food culture.

However, compared to the UK, the gap between animal- and plant-based foods is smaller in Germany for all capability and opportunity factors and most motivation factors, suggesting that plant-based eating has become more normalised in Germany.

In Germany, the disparity between plant- and animal-based foods is greatest in the areas of social norms, taste, availability, habitual consumption and confidence in meal preparation.

The gap is smallest for environmental consideration, importance of the foods for specific health issues or fitness goals, trust in the relevant food industry, and animal welfare. This suggests that these are areas where plant-based foods are demonstrating their value to many consumers.

Flexitarians are especially likely to be drawn to plant-based foods by animal welfare or environmental considerations, as well as enjoying the taste of these foods and feeling good after eating them. They are less likely to choose animal meat and dairy out of habit, feel good after eating them, think they are nutritionally important, or trust the animal meat and dairy industry.

Implications

- Many consumers are motivated to choose plant-based foods for the environment, health or animal welfare. But retailers and foodservice outlets can do more to present them as a mainstream, normal and easily available option, for example by:
    - Using **integrated-segregated merchandising**, where plant-based options are clearly visible alongside conventional meat and dairy.
    - Experimenting with plant-based **default options** on menus.
- Plant-based brands could consider using social proof in marketing campaigns, such as **endorsement by popular social media influencers**.
- Brands can support consumers in cooking with plant-based products by providing **instructions and recipe suggestions** – for example by using on-package QR codes to link to short instructional/inspirational videos.
- Brands and foodservice outlets can emphasise the feel-good factor by using language that focuses on **taste and enjoyment**.
- Product developers should continue investing in bringing down the **cost** of plant-based foods while meeting consumers' **taste expectations**.

There are generally greater levels of capability for animal meat & dairy compared to plant-based.

- Confidence preparing meals using animal meat and dairy is significantly stronger vs plant-based foods.
- There is a relative lack of knowledge about the nutritional value of plant-based foods, however 55% do agree they are important for a balanced diet.
- German adults rate plant-based foods and animal-based foods similarly on their importance for specific health and fitness goals

Plant-based / animal-based capabilities
Among the total DE adult population

	Plant-based foods (PB)	Animal-based meat & dairy (AB)	%-point difference (PB-AB %)
% who **are confident about cooking/preparing a** tasty meal using [plant-based foods / animal-based meat and dairy]	50%	75%	-25%
% who **know some / a lot about the nutritional value of** [plant-based foods / animal-based meat and dairy]	39%	57%	-18%
% who **think it's important to eat** [plant-based foods / animal-based meat and dairy] **for a nutritionally balanced diet**	55%	71%	-16%
% who **find it easy to judge the quality of** [plant-based foods / animal-based meat and dairy]	34%	47%	-14%
% who **think it's important to eat** [plant-based foods / animal-based meat and dairy] **for specific health issues or fitness goals**	30%	32%	-2%

Unweighted N = 2,433 | NETs calculated on Top 4 Box of a 9-point scale.

The opportunity for German adults to consume plant-based foods is somewhat limited vs animal meat and dairy.

- The plant-based category is perceived as having worse availability and slightly worse value for money vs animal meat and dairy.
- In addition, plant-based foods are less likely to form part of social norms, with fewer friends / family members consuming plant-based vs animal meat and dairy.
- The gap is smallest for frequency of seeing relevant adverts, news or content.

Plant-based / animal-based opportunities
Among the total DE adult population

	Plant-based foods (PB)	Animal-based meat & dairy (AB)	%-point difference (PB-AB %)
% who **have some/lots of friends and family who eat** [plant-based foods / animal-based meat and dairy]	29%	79%	-50%
% who **think the availability of** [plant-based foods / animal-based meat and dairy] **is good**	44%	76%	-32%
% who **think** [plant-based foods / animal-based meat and dairy] **are good value for money**	27%	41%	-13%
% who **often see adverts, news or content about** [plant-based foods / animal-based meat and dairy]	28%	37%	-9%

Unweighted N = 2,433 | NETs calculated on Top 4 Box of a 9-point scale.

Motivations are a strong driver of positive plant-based perceptions.

- Sustainability considerations, industry trust and animal welfare draw similar levels of motivation between plant-based and animal meat and dairy.
- However, 80% of people enjoy the taste of animal meat and dairy vs 47% for plant-based foods.
- There is also a gap in habitual consumption, at 31% for plant-based and 58% for animal-based foods.

What does 'feeling good' mean in this context?

Based on data from the pilot phase of the survey, 'feeling good' can be attributed to feeling full or satisfied after eating, social comfort, enjoyment, and/or a sense of normality.

Plant-based / animal-based motivations
Among the total DE adult population

	Plant-based foods (PB)	Animal-based meat & dairy (AB)	%-point difference (PB-AB %)
% who **enjoy the taste of** [plant-based foods / animal-based meat and dairy]	47%	80%	-33%
% who **often choose** [plant-based foods / animal-based meat and dairy] **out of habit**	31%	58%	-27%
% who **feel good about themselves after eating** [plant-based foods / animal-based meat and dairy]	45%	62%	-17%
% who **think** [plant-based foods / animal-based meat and dairy] **are natural**	36%	48%	-12%
% who **are influenced by animal welfare when considering** [plant-based foods / animal-based meat and dairy]	46%	51%	-5%
% who **trust the** [plant-based foods / animal-based meat and dairy] **industry**	38%	42%	-3%
% who **are influenced by environment / sustainability when considering** [plant-based foods / animal-based meat & dairy]	40%	39%	+1%

Unweighted N = 2,433
NETs calculated on Top 4 Box of a 9-point scale.

There are some major differences in perceptions towards plant-based foods between German flexitarians and meat eaters.

These differentiators can be thought about as positive plant-based levers that encourage people towards flexitarianism.

Flexitarians are **more likely** to:

1. Be influenced by animal welfare when considering plant-based foods.
2. Feel good* about themselves after eating plant-based foods.
3. Be influenced by the environment / sustainability when considering plant-based foods.
4. Enjoy the taste of plant-based foods.

**'Feeling good' can be attributed to feeling full or satisfied after eating, social comfort, enjoyment, and/or a sense of normality.*

Biggest differences in plant-based COM-B factors between flexitarians and meat eaters
Flexitarians (Flexitarian/Pescatarian) and meat eaters (Heavy Meat Eater/Omnivore)

Plant-based food	Flexitarians	Meat Eaters	%-point difference (flex-meat %)
% who **are influenced by animal welfare when considering** plant-based foods	59%	32%	+28%
% who **feel good* about themselves after eating** plant-based foods	58%	32%	+25%
% who **are influenced by environment / sustainability when considering** plant-based foods	53%	29%	+24%
% who **enjoy the taste of** plant-based foods	58%	35%	+23%

Meat eaters N = 1,148 Flexitarians N = 1,127
NETs calculated on Top 4 Box of a 9-point scale.

There are also some big differences in perceptions towards animal-based foods between German flexitarians and meat eaters.

These differentiators can be thought about as negative animal-based factors which are pushing people towards flexitarianism.

Flexitarians are **less likely** to:

1. Often choose animal-based meat and dairy out of habit.
2. Feel good* about themselves after eating animal-based meat and dairy.
3. Think it's important to eat animal-based meat and dairy for a nutritionally balanced diet.
4. Trust the animal-based meat and dairy industry.

**'Feeling good' can be attributed to feeling full or satisfied after eating, social comfort, enjoyment, and/or a sense of normality.*

Biggest differences in animal-based COM-B factors between Meat Eaters & Flexitarians
Flexitarians (Flexitarian/Pescatarian) and meat eaters (Heavy Meat Eater/Omnivore)

Animal-based meat & dairy	Flexitarians/ pescatarians	Meat Eaters	%-point difference (flex-meat %)
% who **often choose** animal-based meat and dairy **out of habit**	46%	72%	-26%
% who **feel good* about themselves after eating** animal-based meat and dairy	53%	73%	-20%
% who **think it's important to eat** animal-based meat and dairy **for a nutritionally balanced diet**	66%	79%	-13%
% who **trust** the animal-based meat and dairy **industry**	36%	49%	-12%

Meat eaters N = 1,148 Flexitarians N = 1,127
NETs calculated on Top 4 Box of a 9-point scale.

3. Consumer Profiling

Consumer Profiling:
Summary & implications

What have we learnt?

The German population can be categorised into **four different cohorts** – outlined on the next page – based on their future intentions to increase plant-based consumption and/or decrease animal-based consumption, regardless of current dietary patterns.

The data shows that 51% of German adults intend to change their current consumption either by reducing their animal-based consumption and/or by increasing their plant-based consumption. 21% intend to change both.

We have profiled these four consumer cohorts to understand their:

- Demographic profile.
- Diet, health and fitness profile.
- Notable perceptions of plant-based and animal-based meat and dairy.
- Values and lifestyle profile.

This segmentation allows for a more nuanced understanding of German consumers and their flexitarian intentions.

Implications

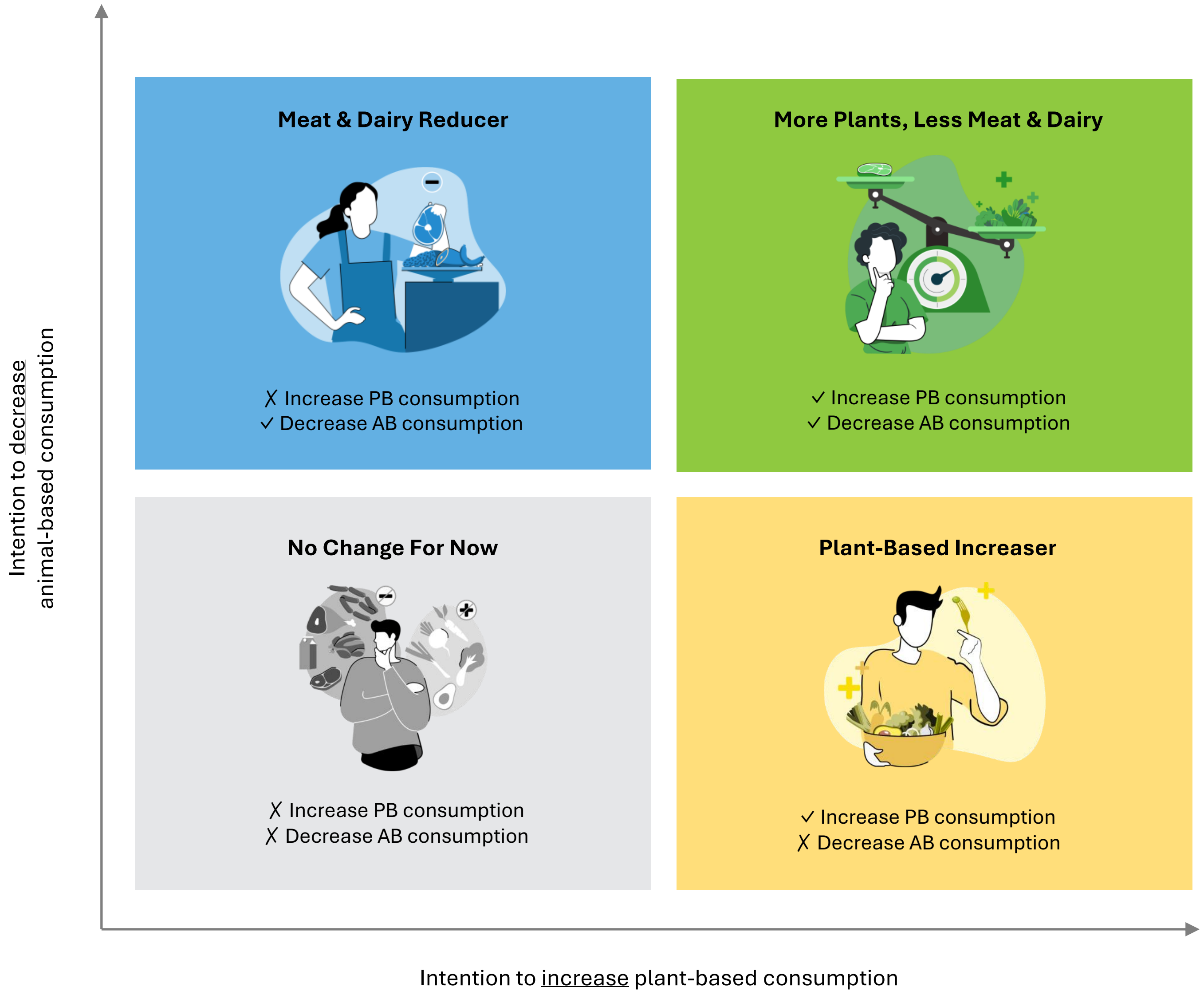
- There is an opportunity for brands to consider which of the four cohorts identified in this research are relevant to their products and how to optimise messaging based on consumers' demographics, values and goals. Two of the cohorts are looking to increase plant-based consumption, but they differ in their priorities as shown below.
- The plant-based industry can reach the **Plant-Based Increaser** cohort – those intending to eat more plant-based foods without reducing animal-based foods – by:
    - Targeting **younger, higher income** consumers.
    - Highlighting the **nutritional attributes** of plant-based foods, particularly high protein and low fat.
    - Showcasing plant-based foods' relevance for **health and fitness goals** including a healthy lifestyle balance, losing weight and building muscle.
- The **More Plants, Less Meat & Dairy** cohort – those intending to cut back on animal meat and dairy at the same time as eating more plant-based – can be reached by:
    - Highlighting benefits for **sustainability** and **animal welfare**.
    - Showing how products can **support a range of goals** without compromise on taste, including achieving a healthy lifestyle balance, maintaining a healthy weight and improving mental wellbeing.

We have understood adult German consumers in a new way

By looking at:

1. Their intention to reduce animal meat and dairy
2. Their intentions to increase plant-based foods

These two metrics create four unique consumer cohorts:

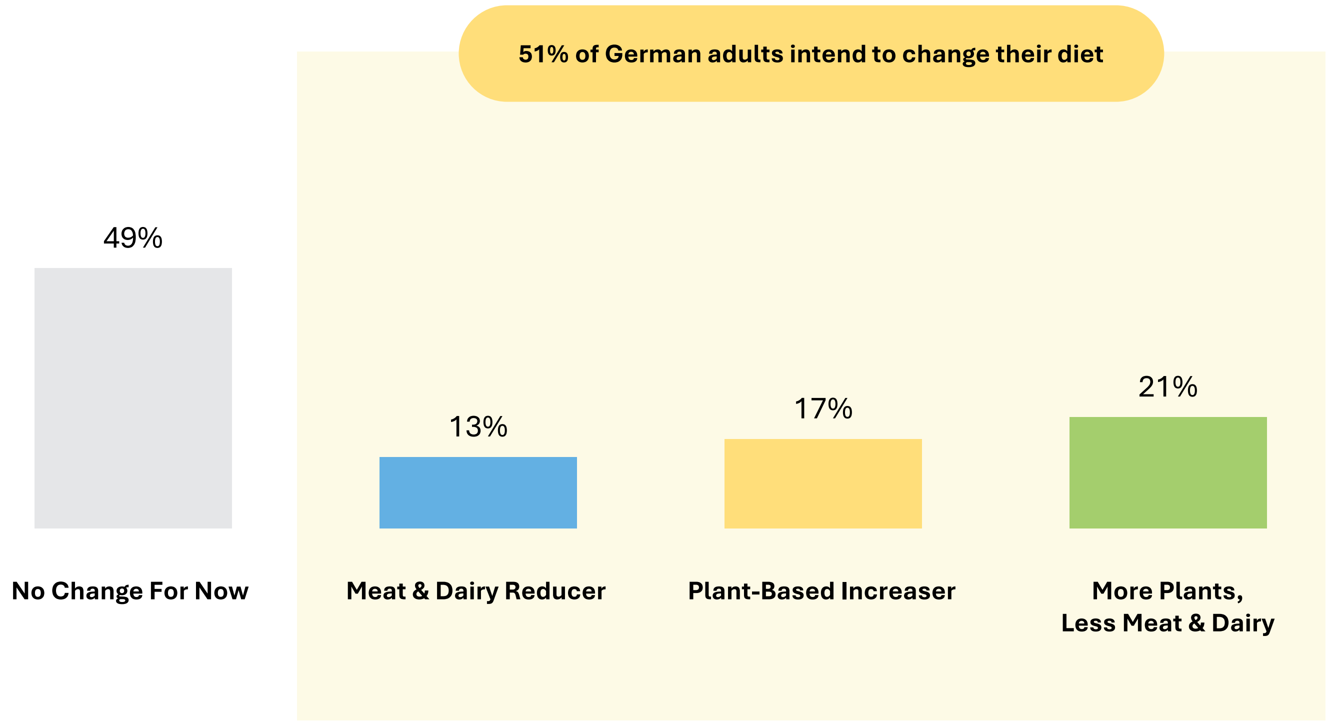


51%

of German adults intend to change their diet, either by increasing their plant-based consumption, and/or by reducing animal meat and dairy.

21% of the German population intend to do both.
The More Plants, Less Meat & Dairy cohort intends to both reduce their meat and dairy consumption AND increase their consumption of plant-based foods.

Proportion (%) of each consumer cohort among all UK adults
Among the total DE adult population



49% | of the DE population

Who are the "No Change for Now" cohort?

Do not intend to reduce their consumption of animal meat and dairy and do not intend to increase their consumption of plant-based foods

Click here for profiling data tables in the appendix

Demographic profile
- 54% are men.
- Skews slightly older (68% are aged 45 or above).
- Low-to-mid household income (43% have an annual household income of below €30k).

Diet, health and fitness profile
- Self-identified diet: heavy meat eater/omnivore (70%), flexitarian/pescatarian (25%), vegetarian/vegan (4%).
- Least likely to have any health or fitness goals (36% have no goals).
- Unlikely to have any special dietary requirements (73% have none).

Notable category capability, opportunity and motivation factors
- Plant-based foods:
  - Lower capability, motivation and opportunity for plant-based foods overall.
  - Less likely to: enjoy the taste of plant-based foods, be confident in cooking a plant-based meal, think plant-based foods are nutritionally important for a balanced diet, trust the plant-based industry, and choose plant-based foods out of habit.

- Animal-based meat and dairy:
  - Mixed capability, motivation and opportunity for animal-based foods.
  - More likely to: have friends or family who eat animal meat and dairy, enjoy the taste of animal meat and dairy, and think animal meat and dairy are nutritionally important for a balanced diet.
  - Less likely to: be influenced by environment/sustainability or animal welfare when considering animal-based foods, and eat animal meat and dairy for specific health issues or fitness goals.

Values and lifestyle profile
- More likely to prioritise being financially secure.
- Less likely to prioritise protecting the environment.

13% of the DE population

Who are the "Meat & Dairy Reducer" cohort?

Do not intend to increase their consumption of plant-based foods but intend to reduce their consumption of animal meat and dairy

Click here for profiling data tables in the appendix

Demographic profile

- 63% are women.
- Skews slightly older (62% are aged 45 or above).
- Lower household income (46% have an annual household income under €30k).

Diet, health and fitness profile

- Self-identified diet: heavy meat eater/omnivore (32%), flexitarian/pescatarian (62%), vegetarian/vegan (5%).
- Top priority is a healthy lifestyle balance (51%), followed by losing weight or reducing body fat (33%).
- Top dietary requirement is low fat (20%).
- Most likely cohort to follow a dairy-free/lactose intolerant diet (10%).

Notable category capability, opportunity and motivation factors

- Plant-based foods:
  - Generally low capability, motivation and opportunity for plant-based foods.
  - More likely than No Change For Now cohort to consider animal welfare/environment, think plant-based foods are nutritionally important and trust the plant-based industry – but not as likely as the two cohorts intending to increase plant-based consumption.
  - Unlikely (18%) to think plant-based foods are good value for money.

- Animal-based meat and dairy:
  - Mixed capability, motivation and opportunity for animal-based foods.
  - Least likely to: think animal-based foods are easily available (67%), see adverts, news or content about animal-based foods (27%), eat animal meat and dairy for specific health or fitness goals (25%), and choose animal meat and dairy out of habit (47%).

Values and lifestyle profile

- Most likely to prioritise keeping fit and healthy (55%).
- Cohort least likely to positively rate their finances (14%).

17% | of the DE population

Who are the "Plant-based Increaser" cohort?

Intend to increase their consumption of plant-based foods but do not intend to reduce their consumption of animal meat and dairy

Click here for profiling data tables in the appendix

Demographic profile

- Predominantly men (54%).
- Skews younger (62% are aged 44 or below).
- Highest proportion with high household income (25% have an annual household income of €60k or above).
- Most likely cohort to have a university level education (35%).

Diet, health and fitness profile

- Self-identified diet: heavy meat eater/omnivore (52%), flexitarian/pescatarian (42%), vegetarian/vegan (5%).
- Most likely cohort to have a health or fitness goal (91%) – primarily a healthy lifestyle balance (43%), losing weight/reducing body fat (34%), or building muscle/increasing strength (33%).
- Top dietary requirements are high protein (19%), low fat (17%) and halal (13%).

Notable category capability, opportunity and motivations

- Plant-based foods:
  - Cohort with the highest capability, motivation and opportunity for plant-based foods overall.
  - Cohort most likely to: rate the availability of plant-based foods well (67%), eat plant-based foods for specific health or fitness goals (58%), and have friends/family who eat plant-based foods (58%).
  - Also likely to: be confident in preparing plant-based meals (74%), think plant-based foods are nutritionally important (83%), and enjoy the taste of plant-based foods (76%).

- Animal-based meat and dairy:
  - The cohort with the highest capability, motivation and opportunity for animal meat and dairy overall.
  - Cohort most likely to: be confident preparing animal-based meals (84%), find it easy to judge nutritional quality (65%), know a lot about the nutritional value (74%) of animal meat and dairy, eat animal-based foods for specific health or fitness goals (58%), think animal meat and dairy are good value for money (62%), and think animal meat and dairy are natural (63%).

Values and lifestyle profile

- Cohort most likely to be positive about their home life, finances, work life, and physical and mental health.
- Cohort most likely to prioritise being successful.

21% | of the DE population

Who are the "More Plants, Less Meat & Dairy" cohort?

Intend to increase their consumption of plant-based foods and intend to reduce their consumption of animal meat and dairy

Click here for profiling data tables in the appendix

Demographic profile
- 59% are women.
- No significant age, income or educational skew.

Diet, health & fitness profile
- Self-identified diet: heavy meat eater/omnivore (24%), flexitarian/pescatarian (67%), vegetarian/vegan (9%).
- Cohort most likely to aim to: achieve a healthy lifestyle balance (60%), lose weight/reduce body fat (42%), and improve mental wellbeing through fitness (38%).

Notable category capability, opportunity and motivations
- Plant-based foods:
  - Generally high capability, motivation and opportunity for plant-based foods.
  - Cohort most likely to: think plant-based foods are nutritionally important (84%), enjoy the taste of plant-based foods (77%), consider animal welfare (74%) or the environment (71%), and feel good after consuming plant-based foods (78%).

- Animal-based meat & dairy:
  - Mixed but generally lower capability, motivation and opportunity for animal meat and dairy overall
  - Cohort least likely to: trust the animal meat & dairy industry (26%), think animal-based foods are natural (38%) or nutritionally important (56%), find it easy to judge the nutritional quality of animal meat and dairy (42%), and think animal-based foods offer good value for money (32%).

Values and lifestyle profile
- Cohort most likely to prioritise protecting the environment (28%) and animal welfare (29%).

4. Final Thoughts

Final Thoughts:
Summary

What have we learned?

- **There is widespread appetite for changing what we eat.**
  - 47% of German adults report that they are already actively reducing their intake of meat (39%) or following a meatless diet (8%).
  - Half (51%) of German adults intend to further change their diets to consume less meat and dairy (34%) and/or more plant-based foods (38%), split across three main cohorts:
    - **Meat & Dairy Reducers (13%)** – a slightly older group, mostly women, aiming to stay healthy or lose weight.
    - **Plant-Based Increasers (17%)** – younger, higher income people with a variety of health and fitness goals, seeking high protein and low fat.
    - **More Plants, Less Meat & Dairy (21%)** – mostly women, aiming for a healthy lifestyle balance, often motivated by the environment or animal welfare.

- **Plant-based eating is widespread and goes far beyond those who eliminate meat from their diets entirely.** 77% of Germany's adult population are potential consumers of plant-based food, when adding together those following low- or no-meat diets and meat eaters who consumed a plant-based subcategory in the last year. Although only 1% of respondents say they follow a vegan diet, 47% of adults reported consuming a plant-based food, such as a vegetable-based meal or plant-based milk, in the last week.

- **Although Germany has moved further towards normalising plant-based foods than the UK, wider consumption of plant-based foods is still limited by social norms, taste, availability, eating habits and confidence in meal preparation.**
  - Only 29% of people have friends or family who eat plant-based foods, compared with 79% for animal-based foods.
  - While 47% enjoy the taste of plant-based foods, 80% say the same for animal meat and dairy.
  - Only 44% of respondents felt that the availability of plant-based foods in shops and restaurants is good compared to 76% for animal-based products.

Final Thoughts:
Recommendations

Recommendations for the plant-based industry as a whole

- **Normalise:** to reach a wider group of consumers and cement the ongoing shift towards plant-based foods in Germany, retailers and food producers can support consumers across each of the three COM-B levers leading to behaviour change – Capability, Opportunity and Motivation.
- **Know-how:** to overcome a lack of familiarity with plant-based foods, the industry can help people gain confidence in choosing plant-based products and preparing delicious plant-based dishes, for example by providing simple recipe suggestions.
- **Nutritional necessity:** the plant-based food industry has a unique opportunity to educate consumers on the nutritional benefits of plant-based foods. By collaborating and using the right platforms, brands can connect with consumers' health priorities and show how plant-based foods and diets support and are essential for a balanced diet.
- **New generation:** with signs that the youngest generation of adults may not be embracing plant-based eating to the same extent as 25-34-year-olds, the industry needs to stay relevant to the needs of younger consumers.

Recommendations for brands

- **Select your segment:** understand what drives your target audience and makes them feel good, whether it's protein for muscle gain, weight loss, or sustainability. Tailoring product messaging to highlight the attributes that align with their priorities will attract like-minded consumers to the relevant brand.
- **Simple:** to bridge the gap between innovation and familiarity, there is an opportunity to develop new products or position existing products using familiar and recognisable formats, cuisines, ingredients, and packaging formats and designs. To create a seamless consumer experience, ensure that products are simple to prepare and that cooking instructions are easy to follow.
- **Satisfy:** although the plant-based sector has performed well in Germany, the taste, texture and cooking properties of plant-based foods can still be improved relative to animal meat and dairy, especially as technology develops. To stand out in the evolving plant-based market, brands can use regular consumer feedback and track repeat purchase rates to ensure their products are satisfying, delicious, enjoyable and perceived as high quality.

5. Appendix

Demographic Profile by Consumer Cohorts		No Change for Now	Meat & Dairy Reducer	Plant-Based Increaser	More Plants, Less Meat & Dairy
Gender	Male	54%	36%	54%	41%
	Female	46%	63%	45%	59%
Age	18-24	7%	13%	12%	12%
	25-34	10%	11%	28%	14%
	35-44	14%	13%	22%	15%
	45-54	16%	11%	16%	15%
	55-64	22%	18%	12%	18%
	65+	31%	32%	10%	26%
Annual Household Income	Under €30k	43%	46%	31%	34%
	€30k-€60k	38%	33%	42%	41%
	€60k +	15%	14%	25%	20%
Region	East	18%	15%	15%	17%
	South	30%	30%	30%	27%
	West	27%	28%	29%	33%
	Central	7%	10%	7%	9%
	North	18%	17%	18%	14%
Highest Education Level	No formal education	1%	1%	2%	1%
	Secondary School Certificate/Intermediate Certificate	30%	30%	18%	25%
	University Entrance Qualification (Fachhochschule/High School Diploma)	31%	36%	36%	32%
	University Education	30%	24%	35%	32%
	Vocational Training/Further Education	8%	9%	9%	11%

Diet, health and fitness profile by Consumer Cohorts		No Change for Now	Meat & Dairy Reducer	Plant-Based Increaser	More Plants, Less Meat & Dairy
Personal Health and Fitness goals	Lose weight or reduce body fat	27%	33%	34%	42%
	Build muscle or increase strength	22%	22%	33%	34%
	Improve cardiovascular fitness (e.g., running, cycling, swimming)	10%	12%	23%	23%
	Enhance flexibility or mobility (e.g., through yoga or stretching)	16%	22%	25%	31%
	Maintain or achieve a healthy lifestyle balance (e.g., nutrition, sleep, and activity)	35%	51%	43%	60%
	Improve mental well-being through fitness (e.g., stress reduction, mindfulness)	19%	25%	29%	38%
	Train for a specific event or sport (e.g., marathon, triathlon, competition)	3%	6%	11%	4%
	Recover from an injury or improve physical rehabilitation	7%	10%	14%	8%
	None of these	36%	15%	9%	11%
Dietary Requirements or Restrictions	Gluten-free / celiac disease	2%	5%	7%	5%
	Dairy-free / lactose intolerant	5%	10%	8%	9%
	Food allergies (e.g. nut, shellfish etc.)	4%	8%	8%	3%
	Low fat	10%	20%	17%	20%
	High protein	9%	15%	19%	15%
	High fibre	6%	10%	11%	13%
	Paleo	1%	1%	3%	1%
	Keto	1%	2%	7%	2%
	Kosher	1%	2%	4%	0%
	Halal	3%	8%	13%	6%
	None of these	73%	52%	53%	59%

Values and lifestyle profile by Consumer Cohorts		No Change for Now	Meat & Dairy Reducer	Plant-Based Increaser	More Plants, Less Meat & Dairy
Ocean Personality Assessment (Average score)	Extroversion	61%	62%	69%	51%
	Agreeableness	51%	51%	59%	37%
	Conscientiousness	37%	38%	58%	33%
	Emotional Stability	53%	55%	64%	47%
	Openness	65%	62%	67%	47%
NET positive about attributes in their life (Top 2 Box)	Homelife	35%	35%	41%	36%
	Finances	17%	14%	28%	18%
	Work-life	19%	17%	27%	20%
	Physical health	22%	19%	32%	18%
	Mental health	34%	35%	37%	32%
Most important values (select up to 3)	Protecting the environment	15%	19%	19%	28%
	Keeping fit and healthy	46%	55%	46%	52%
	Protecting animal welfare	15%	14%	15%	29%
	Being financially secure	49%	41%	39%	43%
	Being successful	11%	12%	16%	9%
	Contributing to my community	1%	3%	9%	2%
	Feeling accepted by others	10%	9%	12%	6%
	Having a positive attitude	34%	36%	29%	32%
	Helping others before myself	12%	16%	15%	15%
	Learning new skills	15%	12%	17%	15%
	Maintaining traditional gender roles	5%	4%	8%	4%
	Keeping up to date with the latest trends	3%	4%	6%	3%
	My faith/spirituality	10%	12%	12%	7%
	Looking after my family	49%	48%	38%	47%

Plant-based category capability, opportunity and motivations by Consumer Cohorts			No Change for Now	Meat & Dairy Reducer	Plant-Based Increaser	More Plants, Less Meat & Dairy
Plant-based COM-B Factors Top 4 Box	Capability	How confident are you about cooking/preparing a tasty meal with plant-based foods?	35%	39%	74%	74%
		Is it easy or hard for you to judge the quality of plant-based foods?	21%	26%	62%	46%
		Do you think plant-based foods are nutritionally important for a balanced diet?	35%	47%	83%	84%
		How much do you know about the nutritional value of plant-based foods?	27%	27%	64%	54%
		Is it important for you to eat plant-based foods for any specific health issues or fitness goals?	14%	23%	58%	47%
	Opportunity	How good or bad is the availability of plant-based foods in store/online or in restaurants?	35%	37%	67%	51%
		Do you think plant-based foods are good or bad value for money?	16%	18%	53%	38%
		How many of your friends or family eat/drink plant-based foods?	16%	24%	58%	38%
		How often do you see adverts, news or content about plant-based foods?	17%	21%	55%	38%
	Motivation	Does animal welfare impact your consideration for plant-based foods?	26%	44%	68%	74%
		Does the environment/sustainability impact your consideration for plant-based foods?	21%	34%	65%	71%
		How much do you trust the plant-based food industry?	21%	30%	66%	63%
		How much do you/would you enjoy the taste of eating/drinking plant-based foods?	27%	37%	76%	77%
		How often do you choose plant-based foods out of habit, without much thought?	16%	19%	62%	50%
		How do/would you feel about yourself after eating/drinking plant-based foods?	24%	38%	69%	78%
		Do you think plant-based foods are natural or processed?	21%	30%	60%	54%

		Animal-based category capability, opportunity and motivations by Consumer Cohorts	No Change for Now	Meat & Dairy Reducer	Plant-Based Increaser	More Plants, Less Meat & Dairy
Animal-based COM-B Factors Top 4 Boxes	Capability	How confident are you about cooking/preparing a tasty meal with animal-based meat & dairy?	71%	71%	84%	81%
		Is it easy or hard for you to judge the quality of animal-based meat & dairy?	45%	43%	65%	42%
		Do you think animal-based meat & dairy are nutritionally important for a balanced diet?	76%	67%	80%	56%
		How much do you know about the nutritional value of animal-based meat & dairy?	52%	50%	74%	59%
		Is it important for you to eat animal-based meat & dairy for any specific health issues or fitness goals?	25%	25%	58%	30%
	Opportunity	How good or bad is the availability of animal-based meat & dairy in store/online or in restaurants?	73%	67%	81%	83%
		Do you think animal-based meat & dairy foods are good or bad value for money?	39%	34%	61%	32%
		How many of your friends or family eat/drink animal-based meat & dairy?	80%	72%	85%	77%
		How often do you see adverts, news or content about animal-based meat & dairy?	28%	27%	62%	45%
	Motivation	Does animal welfare impact your consideration for animal-based meat & dairy?	36%	50%	69%	72%
		Does the environment/sustainability impact your consideration for animal-based meat & dairy?	25%	38%	58%	59%
		How much do you trust the animal-based meat & dairy industry?	45%	34%	59%	26%
		How much do you/would you enjoy the taste of eating/drinking animal-based meat & dairy?	81%	74%	89%	74%
		How often do you choose animal-based meat & dairy out of habit, without much thought?	63%	47%	68%	47%
		How do/would you feel about yourself after eating/drinking animal-based meat & dairy?	66%	54%	76%	44%
		Do you think animal-based meat & dairy are natural or processed?	50%	42%	63%	38%

Addendum: Is the youngest generation returning to meat-eating?

		Age					
		18-24	25-34	35-44	45-54	55-64	65+
	Unweighted n	*262*	*473*	*508*	*356*	*458*	*376*
Self-identified current diet	Heavy meat eater/omnivore	59%	54%	54%	50%	55%	48%
	Flexitarian/pescatarian	35%	37%	41%	44%	40%	47%
	Vegetarian/vegan	6%	9%	5%	5%	5%	4%
Self-reported consumption in the last month	Consumed meat	74%	75%	80%	83%	87%	87%
	Consumed no plant-based subcategories	29%	17%	30%	45%	47%	56%
	Consumed up to 4 plant-based subcategories	57%	64%	56%	45%	46%	40%
	Consumed 5 or more plant-based subcategories	14%	20%	14%	10%	6%	4%
Current self-reported rate of change	Report increased consumption frequency of meat/fish over the past 12 months	39%	44%	32%	21%	19%	16%
	Report decreased consumption frequency of meat/fish over the past 12 months	48%	42%	39%	36%	41%	42%
Intention to change in the future	Looking to increase the amount of plant-based foods they consume	46%	54%	44%	39%	31%	27%
	Looking to decrease the amount of animal meat and dairy they consume	20%	29%	21%	11%	5%	2%

- Compared to 25-34-year-olds, the youngest generation of adults in Germany (18-24-year-olds) is **less likely to be following a vegetarian/vegan or flexitarian/pescatarian diet**, to have eaten plant-based foods in the last month, or to intend to increase plant-based consumption or decrease animal meat and dairy consumption in the future.
- However, the youngest generation is still **more likely than those aged 45+ to have eaten plant-based** subcategories in the last month.
- Furthermore, despite being the generation most likely to identify as a heavy meat eater or omnivore, 18-24-year-olds are in fact the **least likely to report having consumed meat** in the last month.
- The youngest generation is also the **most likely to report having decreased their consumption of meat/fish** in the past year.
- **25-34-year-olds** are both the most likely to be heavy plant-based consumers and the most likely to report having increased their meat/fish consumption over the past year.
- As to future intentions, **intent to increase plant-based and decrease animal-based consumption is highest among 25-34-year-olds**. These intentions are lower among the youngest (18-24) generation, but still higher than those of older generations (aged 45+).
- The picture is further complicated by **gender**, as shown on the next slide.

Addendum: Is the youngest generation returning to meat-eating?

		Age x Gender											
		Male 18-24	Male 25-34	Male 35-44	Male 45-54	Male 55-64	Male 65+	Female 18-24	Female 25-34	Female 35-44	Female 45-54	Female 55-64	Female 65+
	Unweighted n	*71*	*198*	*232*	*182*	*218*	*215*	*191*	*275*	*276*	*174*	*240*	*161*
Self-identified current diet	Heavy meat eater/omnivore	75 %	60 %	61 %	60 %	69 %	64 %	46 %	49 %	48 %	42 %	41 %	33 %
	Flexitarian/pescatarian	23 %	36 %	36 %	37 %	28 %	34 %	45 %	38 %	45 %	51 %	51 %	60 %
	Vegetarian/vegan	1 %	4 %	3 %	3 %	3 %	2 %	10 %	13 %	6 %	7 %	7 %	7 %
Self-reported consumption in the last month	Consumed meat	83 %	78 %	82 %	89 %	90 %	92 %	66 %	73 %	78 %	78 %	84 %	83 %
	Consumed no plant-based subcategories	36 %	9 %	35 %	52 %	50 %	56 %	22 %	25 %	26 %	38 %	44 %	56 %
	Consumed up to 4 plant-based subcategories	52 %	68 %	49 %	40 %	45 %	41 %	62 %	59 %	62 %	51 %	47 %	39 %
	Consumed 5 or more plant-based subcategories	12 %	23 %	16 %	8 %	4 %	3 %	15 %	17 %	12 %	11 %	9 %	5 %
Current self-reported rate of change	Report increased consumption frequency of meat/fish over the past 12 months	40 %	50 %	34 %	26 %	21 %	20 %	38 %	37 %	29 %	16 %	18 %	11 %
	Report decreased consumption frequency of meat/fish over the past 12 months	52 %	35 %	33 %	33 %	33 %	39 %	44 %	49 %	46 %	39 %	48 %	44 %
Intention to change in the future	Looking to increase the amount of plant-based foods they consume	44 %	58 %	46 %	38 %	29 %	20 %	48 %	50 %	41 %	39 %	32 %	34 %
	Looking to decrease the amount of animal meat & dairy they consume	27 %	39 %	26 %	18 %	6 %	2 %	13 %	19 %	15 %	5 %	3 %	2 %

- There appears to be a **divergence between men and women** in the youngest generation, although the small sample size of men aged 18-24 means this conclusion should be treated with caution.
- The youngest generation of **women are even more likely than 25-34-year-olds to identify as flexitarian/ pescatarian,** more likely to have consumed a plant-based subcategory in the last month, and less likely to have eaten meat in the last month.
- Young men, however, are **far more likely than 25-34-year-old men to identify as a heavy meat eater or omnivore**, and to have eaten meat or have consumed no plant-based subcategories in the last month.