Alternative protein: Plant-based | Region: Germany | June 2025

2022 to 2024

Germany plant-based food retail market insights

Meat, seafood, milk and drinks, cheese, yoghurt and cream.

Image credit: Planted Foods AG

gfi / Europe

Executive summary

This report shows retail sales trends in six plant-based categories (meat, seafood, milk and drinks, cheese, yoghurt and cream) in Germany between 2022 and 2024, based on data from Circana. It also uses NIQ Homescan data to investigate trends in household purchase patterns.

The German retail market across six categories of plant-based food was **valued at €1.7 billion** in 2024.	The combined sales **volume** of six plant-based categories in Germany **increased by 7.1%** between 2023 and 2024.	**32%** of German households bought plant-based **meat** at least once in 2024.	**37%** of German households bought plant-based **milk and drinks** at least once in 2024.

The German plant-based market, the largest in Europe, is seeing ongoing increases in unit sales and sales volume, driven by rising sales of relatively affordable private-label products.

The combined sales value across six plant-based categories was €1.68 billion in 2024 – 1.5% higher than in 2023 and 6.8% higher than in 2022. The levelling off in sales value reflects falling prices, as sales volume rose by 7.1% between 2023 and 2024 and by 13.5% between 2022 and 2024. Private-label products – those sold under the brand of a retailer – are driving the growth in sales volume. They tend to have lower prices compared to branded products, which did not grow in sales volume between 2023 and 2024.

Sales volume grew between 2023 and 2024 in four of the six categories in this report: meat, milk and drinks, yoghurt and cream.

Plant-based milk and drinks are becoming more affordable relative to animal-based milk – particularly in the private-label segment – which is likely to be driving the ongoing growth in sales volume in this already well-established category. Household panel data shows that the increase in demand is most likely coming from more frequent purchases among existing consumers, rather than from new consumers.

Overview of plant-based food sales by category in Germany, 2022-2024

	Sales value			Unit sales			Sales volume		
	2024, € millions	2023-24 change	2022-24 change	2024, millions of units	2023-24 change	2022-24 change	2024, millions of kg	2023-24 change	2022-24 change
Meat	758.7	3.9%	7.8%	353.2	6.7%	8.2%	53.9	6.2%	5.3%
Seafood	18.6	-23.9%	-21.8%	6.7	-26.2%	-25.4%	1.4	-24.2%	-27.8%
Milk and drinks	595.4	3.6%	11.2%	396.1	6.4%	15.2%	392.9	7.6%	16.6%
Cheese	94.3	-15.7%	-14.5%	50.8	-0.7%	6.5%	7.7	-2.1%	3.2%
Yoghurt	161.1	-1.9%	0.1%	108.5	7.6%	9.8%	44.2	6.5%	-0.6%
Cream	56.1	4.5%	29.5%	55.2	10.4%	32.9%	11.9	8.7%	31.7%
Total	**1684.2**	**1.5%**	**6.8%**	**970.5**	**6.1%**	**11.9%**	**512.0**	**7.1%**	**13.5%**

Plant-based food sales value by category in Germany, 2022-2024 (€ millions)

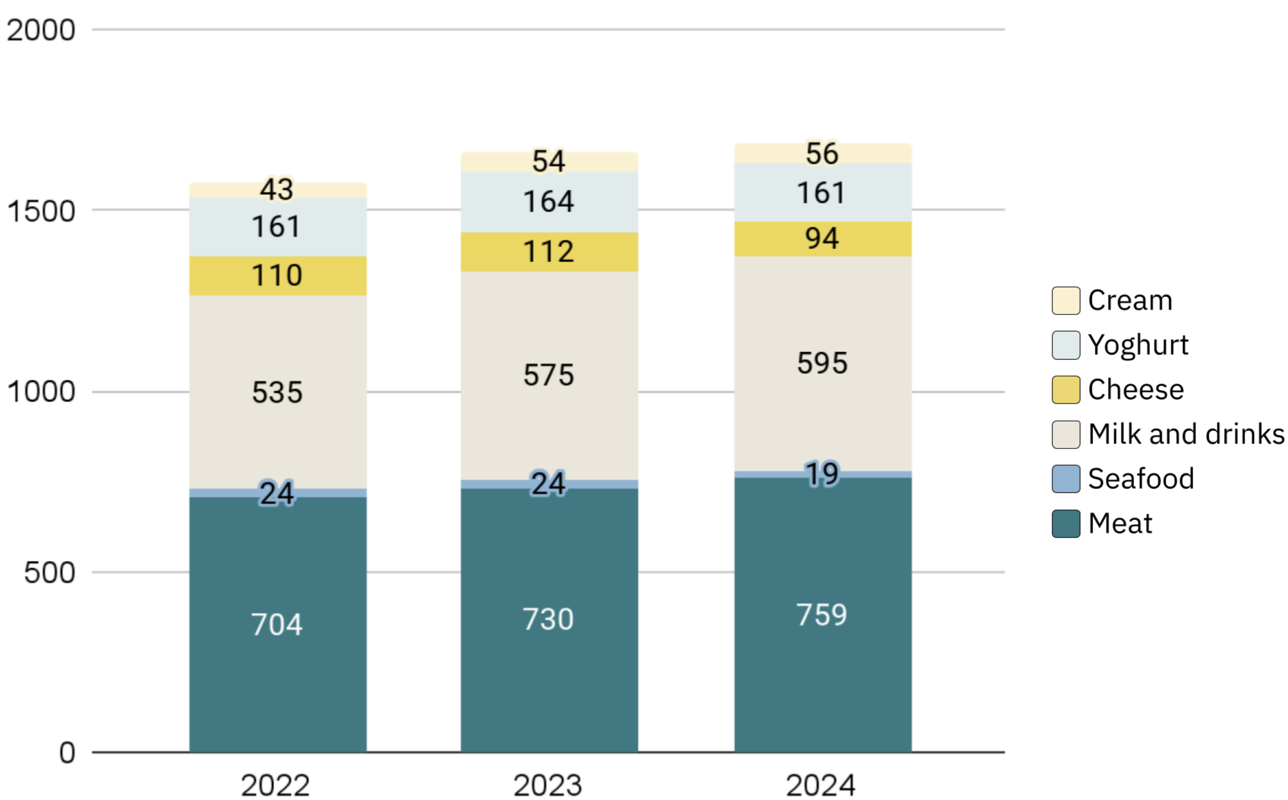


Table of contents

About the data

This report is based on sales data gathered by [Circana] from retailers in Germany. The data has been analysed by the Good Food Institute Europe. It also draws on household panel data from the [NIQ Panel On Demand Homescan] consumer panel, which tracks food purchases made by a representative panel of households, to offer a complementary viewpoint to the Circana retail sales data.

The Circana data for Germany covers supermarkets over 200m^2 in area, hypermarkets like real and Kaufland, and discounter stores such as Aldi and Lidl. It does not include food service sales, such as from restaurants or fast-food outlets.

Sales value figures include taxes.

Data for 2022, 2023 and 2024 covers 52-week periods beginning with the first calendar week of each year.

The totals in this report are not comparable to those in our previous publication, *Germany plant-based food retail market insights: 2021 to 2023 with initial insights into the 2024 market.* This is because the totals have been updated following a correction in the categorisation of the data from Circana. This year's dataset has been verified by cross-checking the totals within a new data format provided by Circana. The sales data for France, Italy, the Netherlands, Spain and the UK in our previous publications was not affected. Furthermore, the previous German report additionally included ready meals and desserts & puddings, which are not covered in this report.

Note also that since a different data provider has been used, with different product category definitions and coverage, the numbers in this report are not directly comparable to those in GFI Europe's other previous publication, *Market insights on European plant-based sales 2020-2022*.

Key terms

Plant-based: foods that are made from plants. Where data permits, we have focused specifically on plant-based products that aim to mimic the taste and texture of animal products. In some categories, non-analogue products such as those based on beans or lentils are also included because the data does not permit further subcategorisation.

Animal-based: food derived from animals, such as meat from pigs or milk from cows.

Plant-based meat: foods made from plants or fungi that are designed to be similar to animal-based meat in taste and texture. The Circana data for plant-based meat may include some products that are not direct substitutes for meat, such as bean burgers, because it was not possible to fully separate out these products. Plant-based meat products may contain small amounts of egg or dairy, but plant-based ingredients like soy or pea are the main protein sources. Plant-based meat does not include tofu, tempeh or seitan – these categories have been reported separately.

Plant-based milk and drinks: drinks made from plants such as soy or oat that are intended to mimic the taste and performance of animal-based dairy milk. The plant-based milk and drinks category includes plain and flavoured plant-based milks as well as some other drinks containing a dairy alternative component, such as coffee drinks. It does not include fruit juices or other drinks not designed to replicate dairy.

Market share: the proportion of all sales in a wider product category (comprising both plant-based and animal-based versions) that is plant-based. This is calculated by dividing plant-based sales by the sum of plant-based and animal-based sales. Market share can be calculated on the basis of sales volume or sales value. Note that in this report, market share is calculated based only on retail sales of pre-packaged products.

Private label: products that are sold under the label of a retailer, as opposed to branded products. Also known as supermarket own-brand products.

Sales value: the total value of sales measured in euros (€).

Sales volume: the total quantity of products sold measured in kilograms (kg) or litres (l), depending on the product category.

Unit sales: the total number of units of a product sold. A unit can refer to a pack, carton or tub, for instance.

Overall plant-based food market

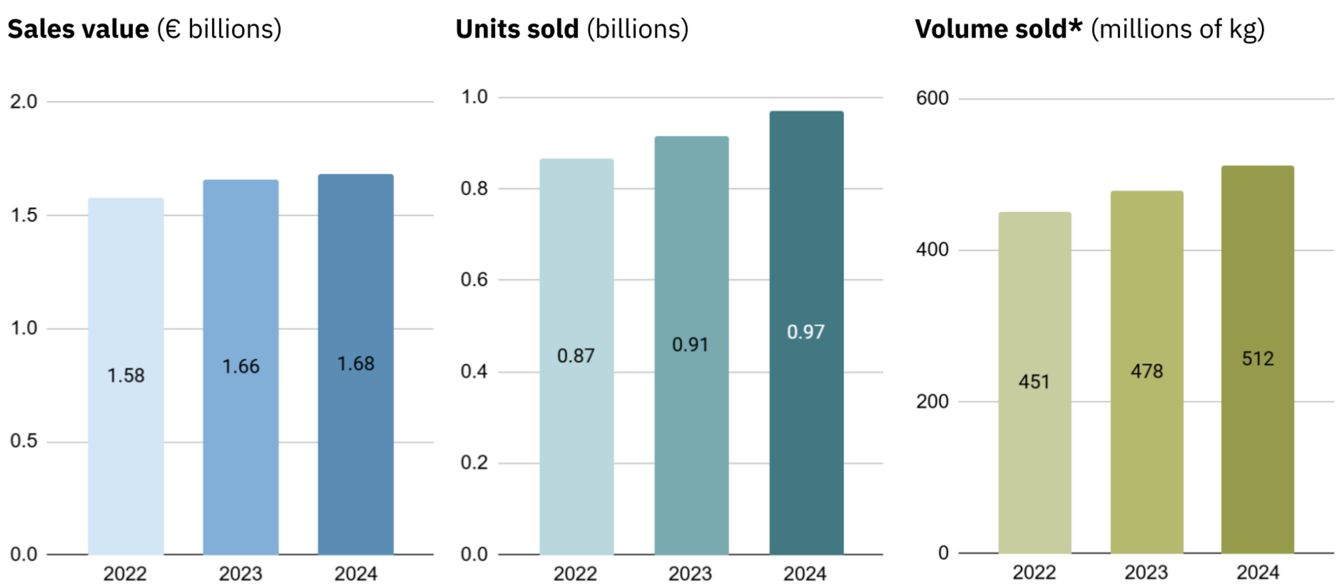
Total German plant-based market

Demand for plant-based foods in Germany, Europe's largest plant-based market, continues to grow, driven by sales of relatively affordable private-label products.

Annual sales value across six plant-based categories reached €1.68 billion in 2024 – 1.5% higher than in 2023 and 6.8% higher than in 2022. The plateau in sales value between 2023 and 2024 was driven by reductions in price, rather than a slowdown in demand.

Unit sales reached 971 million in 2024 – an increase of 6.1% compared to 2023, and an increase of 11.9% relative to 2022. Similarly, sales volume rose to 512 million kg, up by 7.1% compared to 2023, and up by 13.5% compared to 2022. This rise in unit sales and sales volume shows that the underlying demand for plant-based food is increasing.

Plant-based food sales across six categories in Germany, 2022-2024



**Sales volume was reported by Circana in litres for milk and drinks, in mixed kg and litres for cream and in kg for all other categories. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.*

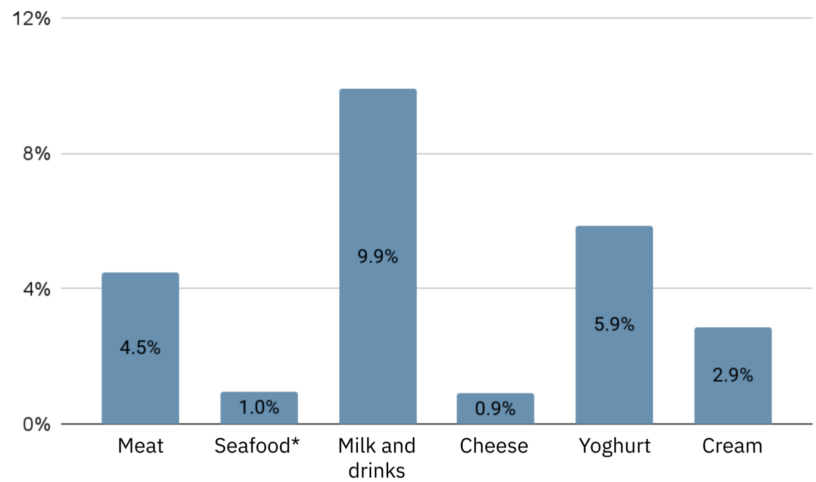
Categories

The most well-established plant-based category in Germany is milk and drinks, which accounted for 9.9% of overall sales value and 8.8% of sales volume in 2024 (as a proportion of both plant- and animal-based sales, counting pre-packaged products only).

Plant-based cheese and seafood are relatively small categories, accounting for 1% or less of sales value. Plant-based meat and cream have achieved small but growing levels of market share, while that of plant-based yoghurt has rebounded after a dip in 2023.

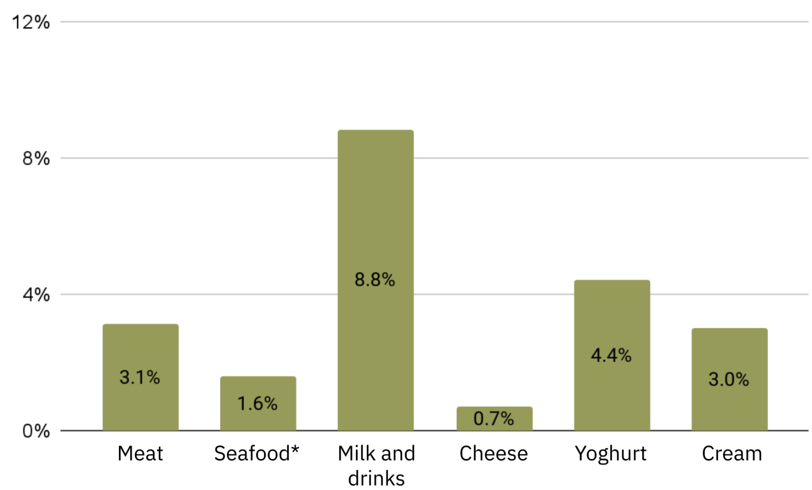
Plant-based cream is the only product that has a greater market share by volume than by value. This is because it was cheaper per kg than animal-based cream in 2024.

Plant-based food: share of Germany's total pre-packaged (plant- and animal-based) sales for each category, 2024 (% of sales value)



The market share of seafood has been calculated based on frozen plant- and animal-products only, since no chilled animal-based seafood data is available.

Plant-based food: share of Germany's total pre-packaged (plant- and animal-based) sales for each category, 2024 (% of sales volume)



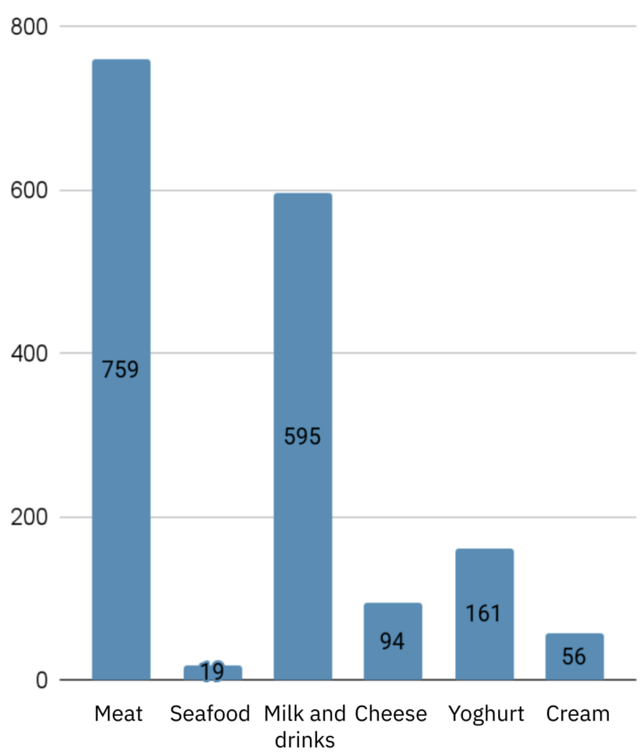
The market share of seafood has been calculated based on frozen plant- and animal-products only, since no chilled animal-based seafood data is available.

There has been mixed performance across product categories. The two largest plant-based categories – meat, and milk and drinks – grew in value between 2023 and 2024, as did the small but emerging plant-based cream category.

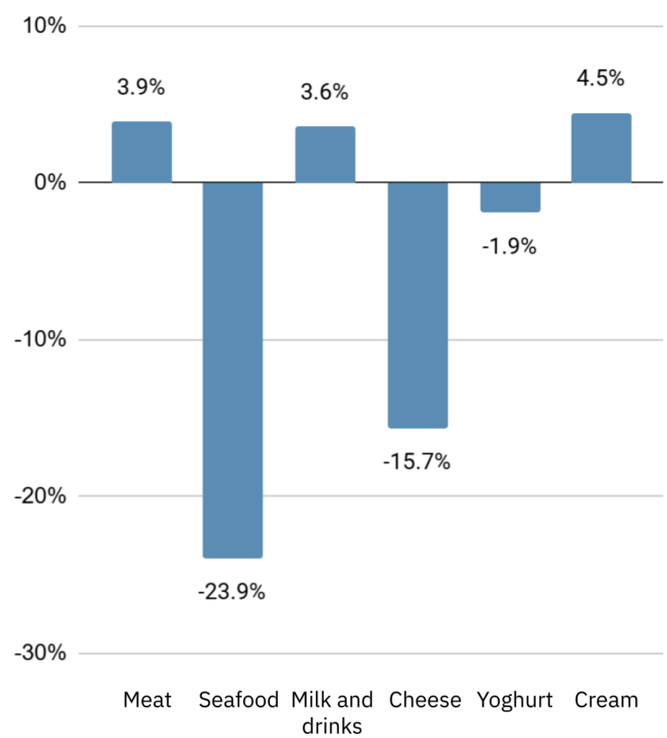
The sales value of plant-based seafood and cheese, on the other hand, declined significantly. For seafood, this decline is driven primarily by a fall in sales volume, whereas for cheese, it is predominantly driven by falling prices, as sales volume fell by only 2.1%.

Plant-based yoghurt sales remained roughly level as prices fell while sales volume increased between 2023 and 2024.

Plant-based food sales value by category in Germany, 2024
(€ millions)



Change in the sales value of plant-based foods in Germany, 2023-2024 (%)



Branded versus private label

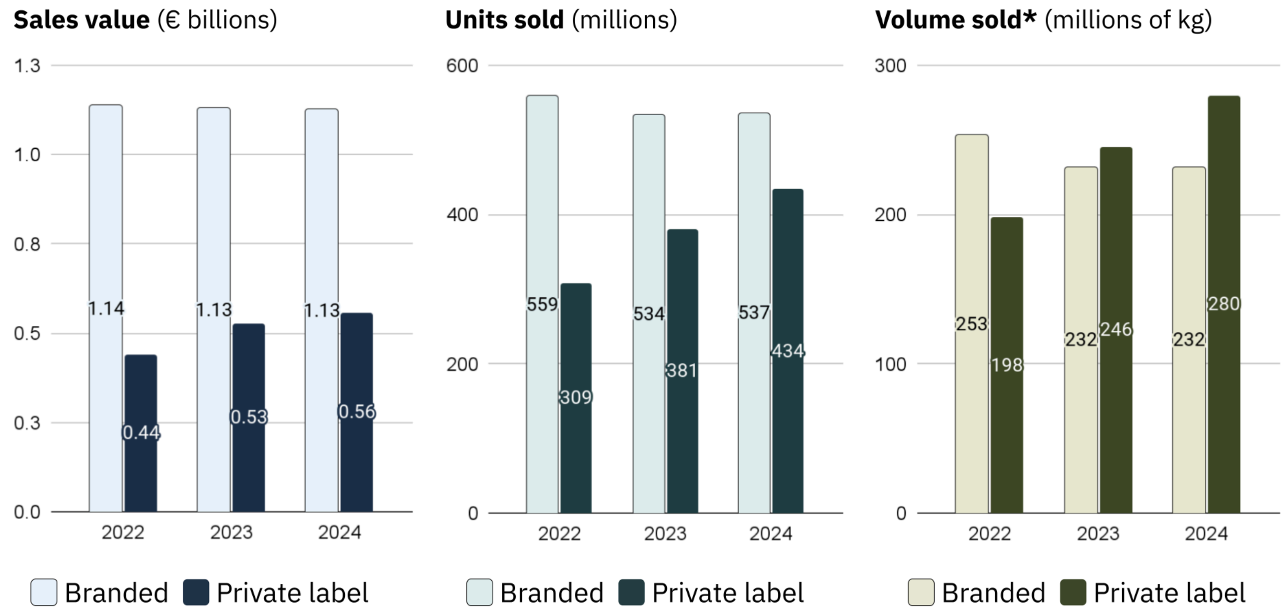
Private-label products – ie, supermarket or discount store own-label products – have grown rapidly in Germany. Meanwhile, the sales value of branded products remained level between 2022 and 2024, while sales volume levelled out in 2024 following a drop in 2023.

It is likely that the success of private-label products is due in part to their affordability, as they are in most cases cheaper per kg than branded products. The market share of private-label products also indicates that some plant-based categories have become sufficiently mainstream to persuade retailers to invest in developing their own products. However, it will remain crucial for retailers to meet consumer expectations on both price and taste, as both are key factors influencing consumer choice.

Plant-based sales and growth rates across six product categories in Germany, branded versus private label, 2022-2024

	Sales value			Unit sales			Sales volume		
	2024, € billion	2023-24 change	2022-24 change	2024, million units	2023-24 change	2022-24 change	2024, million kg	2023-24 change	2022-24 change
Branded	1.13	-0.4%	-1.0%	537	0.6%	-3.9%	232	0.0%	-8.3%
Private label	0.56	5.5%	26.8%	434	13.8%	40.6%	280	13.9%	41.4%

Branded vs private label plant-based food sales across six categories in Germany, 2022-2024



**Sales volume was reported by Circana in litres for milk and drinks, in mixed kg and litres for cream and in kg for all other categories. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.*

Comparison to animal-based foods

The sales volume of all animal-based equivalents of the plant-based categories covered in this report either grew slightly or remained stable between 2023 and 2024.

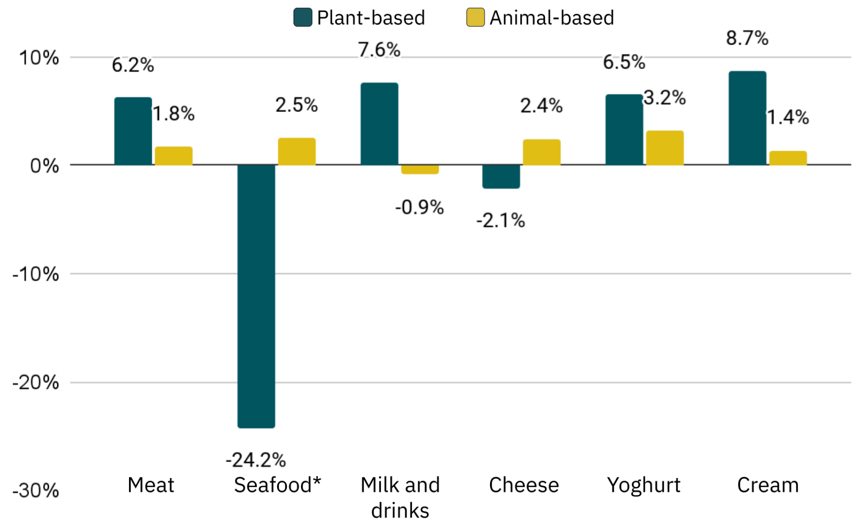
On the basis of percentage change, plant-based meat, milk and drink, yoghurt and cream outperformed their animal-based counterparts. Note, however, that the animal-based categories started from a much larger market size.

Plant-based foods are generally more expensive per kg than animal-based foods. This holds true for all categories but cream and seafood.

Plant-based seafood (chilled and frozen) is, on average, cheaper per kg than frozen animal-based seafood (data for chilled animal-based seafood was not available), but this has not translated into rising sales. Note that animal-based seafood is a very diverse category, including both cheap products such as fish fingers and expensive specialist products such as caviar, so it would be more informative to compare prices within specific product types – but this level of specificity was not available in the current dataset.

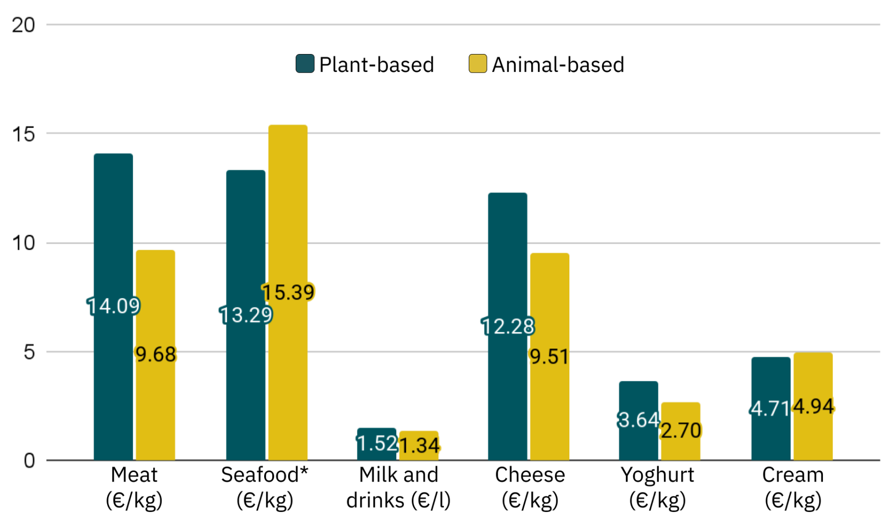
Plant-based cream has made the most progress on price. In 2024, it was 5% cheaper per kg than animal-based cream, thanks to the large and increasing market share of cheaper private-label products. Plant-based milk and drinks have also made progress, as private-label products were 2% cheaper per litre in 2024 than private-label animal-based milk.

Change in the sales volume of pre-packaged plant- and animal-based foods in Germany, 2023-2024 (%)



In this graph, plant-based seafood covers both chilled and frozen products, while animal-based seafood covers frozen products only.

Average price per kg or litre of plant- and animal-based foods in Germany, 2024
(€ per kg or l)



In this graph, plant-based seafood covers both chilled and frozen products, while animal-based seafood covers frozen products only.

Household purchase patterns

The retail sales data from Circana, which most of this report is based on, shows trends in purchases at supermarkets and discounter stores. However, it does not give any information about how frequently consumers are buying plant-based foods.

For a complementary view, GFI Europe obtained household panel data from NIQ Homescan. This tracks trends in foods purchased and brought home by a panel of 20,000 households. The data is nationally representative of households in Germany.

The results track the proportions of households that purchased either plant-based meat or plant-based milk at least once per year, at least six times per year and at least 12 times per year (frequent purchasers). They also show the proportion of sales value from discounter stores (such as Aldi and Lidl).

The proportion of households purchasing plant-based meat at least once per year has remained steady between 2022 and 2024, while the proportion of frequent purchasers was slightly higher in 2023 than in 2022 and 2024. For plant-based milk, frequent purchasers have become more common, while the overall proportion of households buying at least once per year has fallen.

This suggests that the increase in sales shown by the Circana retail sales data may have come from more frequent purchases among existing consumers, rather than from new customers.

Household purchase patterns for plant-based foods in Germany, 2022-2024

Germany	% buying at least once per year			% buying 6 or more times per year			% buying 12 or more times per year			% of sales value from discounter stores		
	2022	2023	2024	2022	2023	2024	2022	2023	2024	2022	2023	2024
Plant-based meat	32.6%	32.7%	32.2%	14.8%	15.3%	14.9%	9.8%	10.3%	9.7%	32.9%	33.3%	33.0%
Plant-based milk	38.2%	37.9%	36.6%	18.2%	18.7%	18.8%	11.3%	11.9%	12.2%	32.6%	35.0%	37.6%

Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Germany. The data covers ‘Take Home’ shopping and comes from a sample of 20,000 households. Data covers “plant-based meat substitutes” and “plant-based milk”.

Plant-based meat

Total market

Demand for plant-based meat[1] in Germany rose between 2023 and 2024, following a plateau between 2022 and 2023.

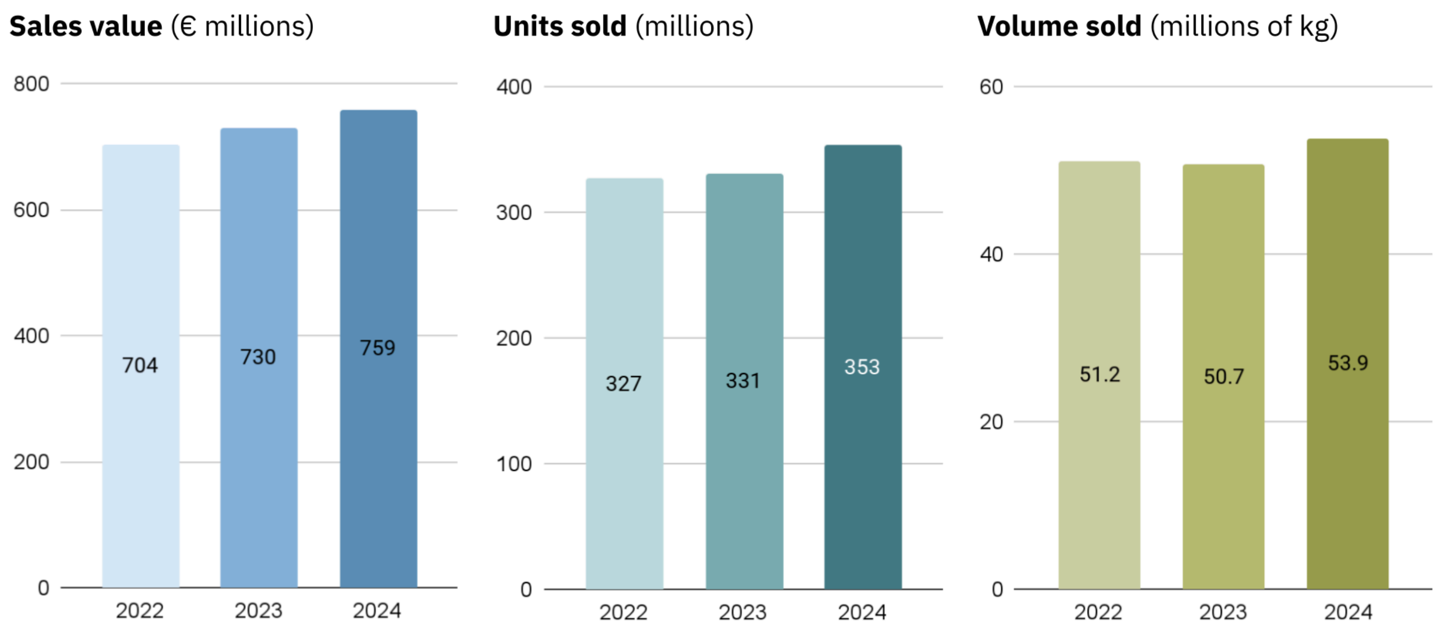
Annual sales value grew steadily, reaching €759 million in 2024 – an increase of 3.9% relative to 2023 and 7.8% relative to 2022. Unit sales and sales volume were roughly steady between 2022 and 2023, but rose by 6.7% and 6.2%, respectively, between 2023 and 2024. Unit sales reached 353 million in 2024, while sales volume reached 53.9 million kg in 2024.

The increase in sales value between 2022 and 2023 was driven mainly by a rise in the average price of plant-based meat, in line with a period of record inflation experienced in the broader food sector during early 2023. The increase in sales value between 2023 and 2024, on the other hand, reflects a growth in the quantity of plant-based meat sold.

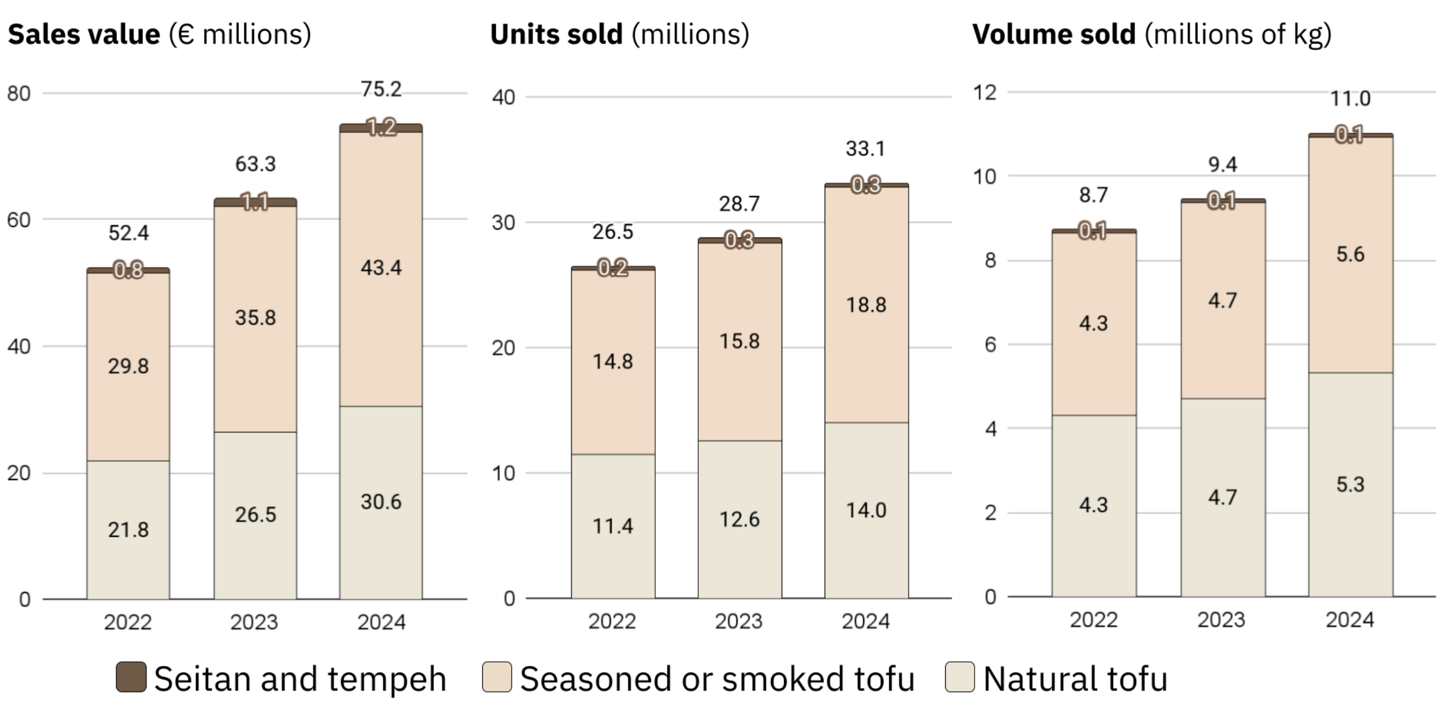
Combined sales of tofu, tempeh and seitan, which are not classed as plant-based meat in this report, remain low relative to those of plant-based meat, which demonstrates the importance to the German market of options that use familiar 'meaty' formats. Combined sales of tofu, tempeh and seitan have, however, accelerated, with annual sales volume rising by 8.3% from 2022 to 2023 and 16.7% from 2023 to 2024. The relatively low price of these products (€6.82/kg in 2024) compared to both plant-based meat (€14.09 in 2024) and animal-based meat (€9.68/kg in 2024) is likely to have driven this growth. The overall picture is one in which German consumers are seeking a wide range of meat alternatives.

[1] Plant-based substitutes for meat that use formats similar to those of conventional meat products, such as burgers, sausages and meatballs. The data does not permit a full isolation of only the products that are intended to replicate the taste and texture of animal-based meat. The plant-based meat category in this report may therefore contain some products such as bean burgers that are not direct substitutes for meat. It does not, however, include tofu, tempeh or seitan, which are reported separately.

Plant-based meat sales in Germany, 2022-2024



Tofu, seitan and tempeh sales in Germany, 2022-2024

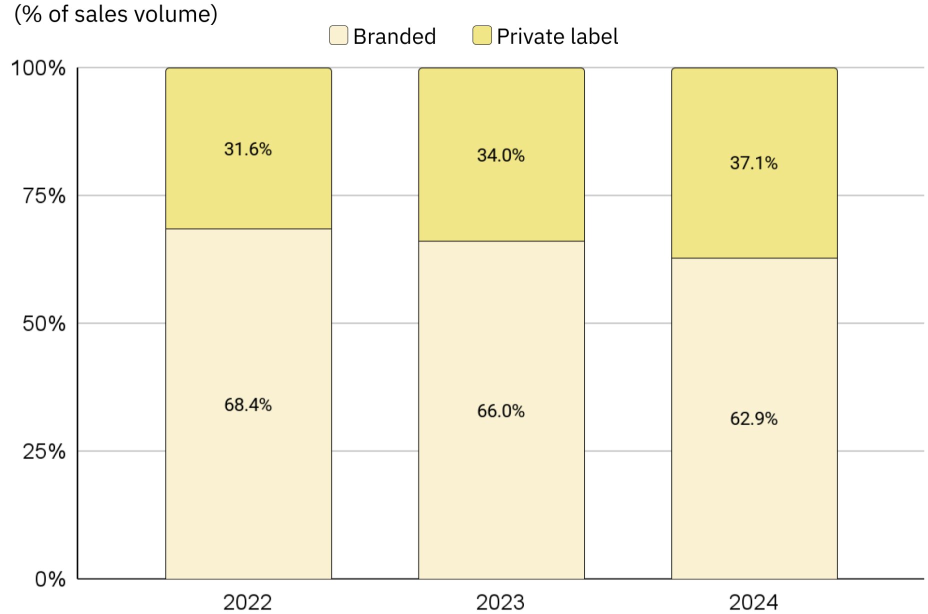


Branded versus private label

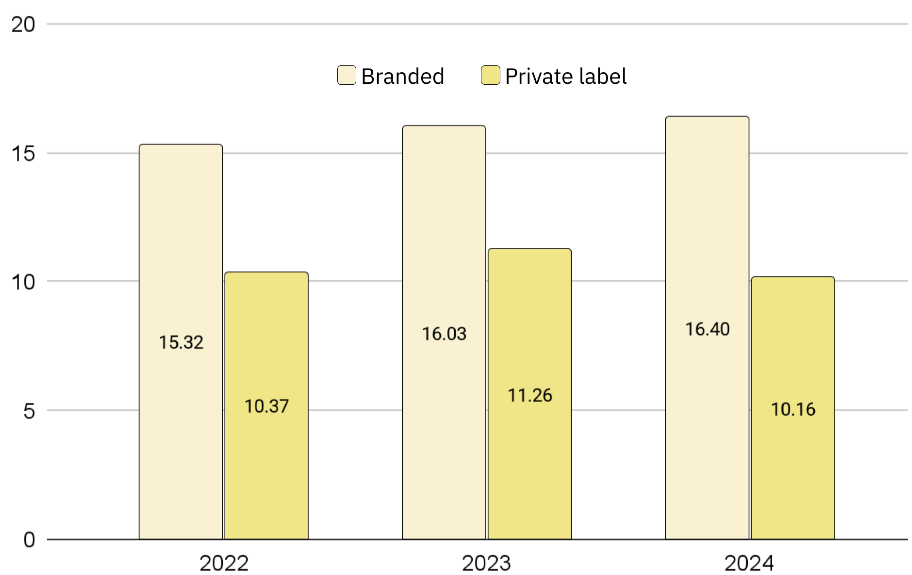
Private-label plant-based meat products (ie, supermarket and discount store own-brand products) account for a large and growing part of Germany's plant-based market.

Private-label products grew from 31.6% of sales volume in 2022 to 37.1% in 2024, likely driven by their affordability relative to branded products. In 2024, private-label plant-based meat products were on average 38% cheaper per kg than branded products.

Germany plant-based meat sales by branded or private label, 2022-2024
(% of sales volume)



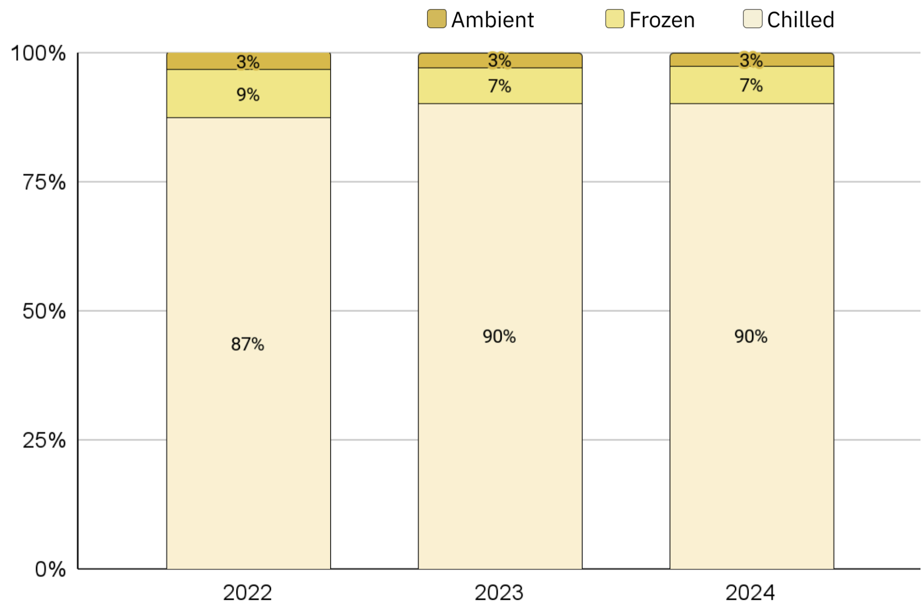
Average price per kg of plant-based meat in Germany, by branded or private label, 2022-2024 (€/kg)



Product format breakdown

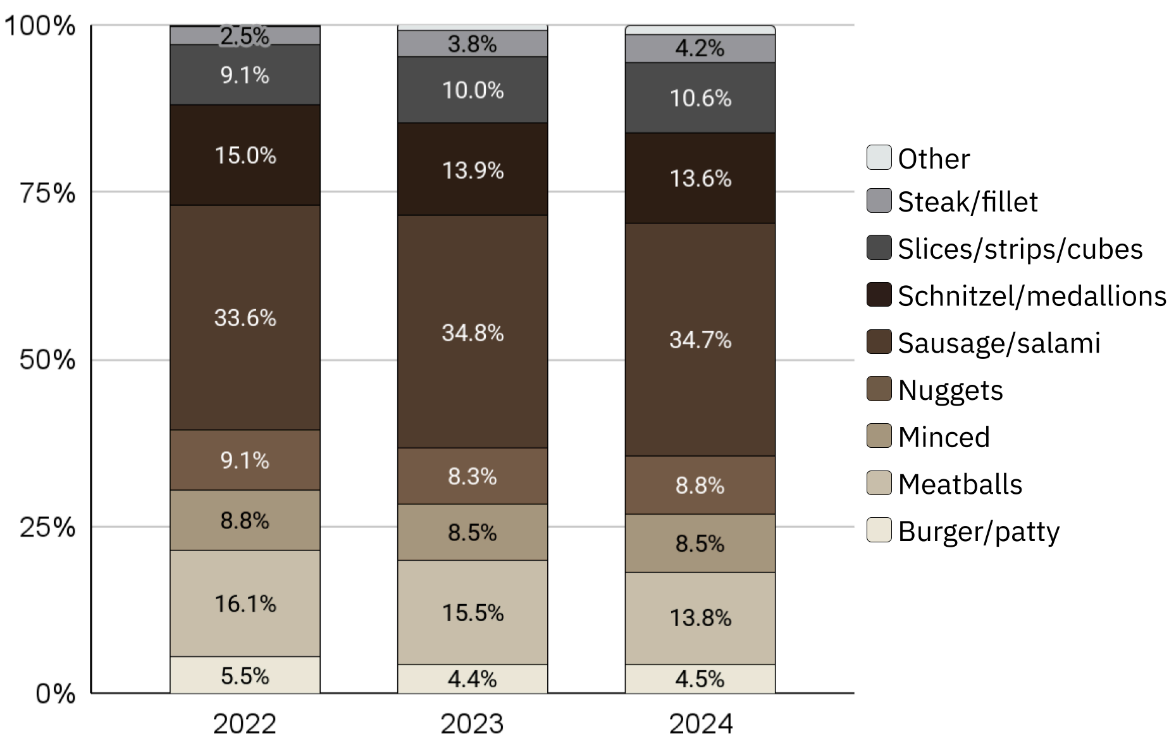
For the products for which data is available, the vast majority are chilled (90% of sales volume in 2024), with only 7% frozen and 3% ambient. There has been a slight shift towards chilled products between 2022 and 2024.

Germany plant-based meat sales by temperature, 2022-2024 (% of sales volume)



Germany's plant-based meat market is diverse, with a good spread of product formats. Sausage/salami led the market with 34.7% of sales volume in 2024, meatballs at 13.8% and schnitzel/medallions at 13.6%. The emerging steak/fillet category grew from 2.5% in 2022 to 4.2% in 2024.

Germany plant-based meat sales by format, 2022-2024 (% of sales volume)

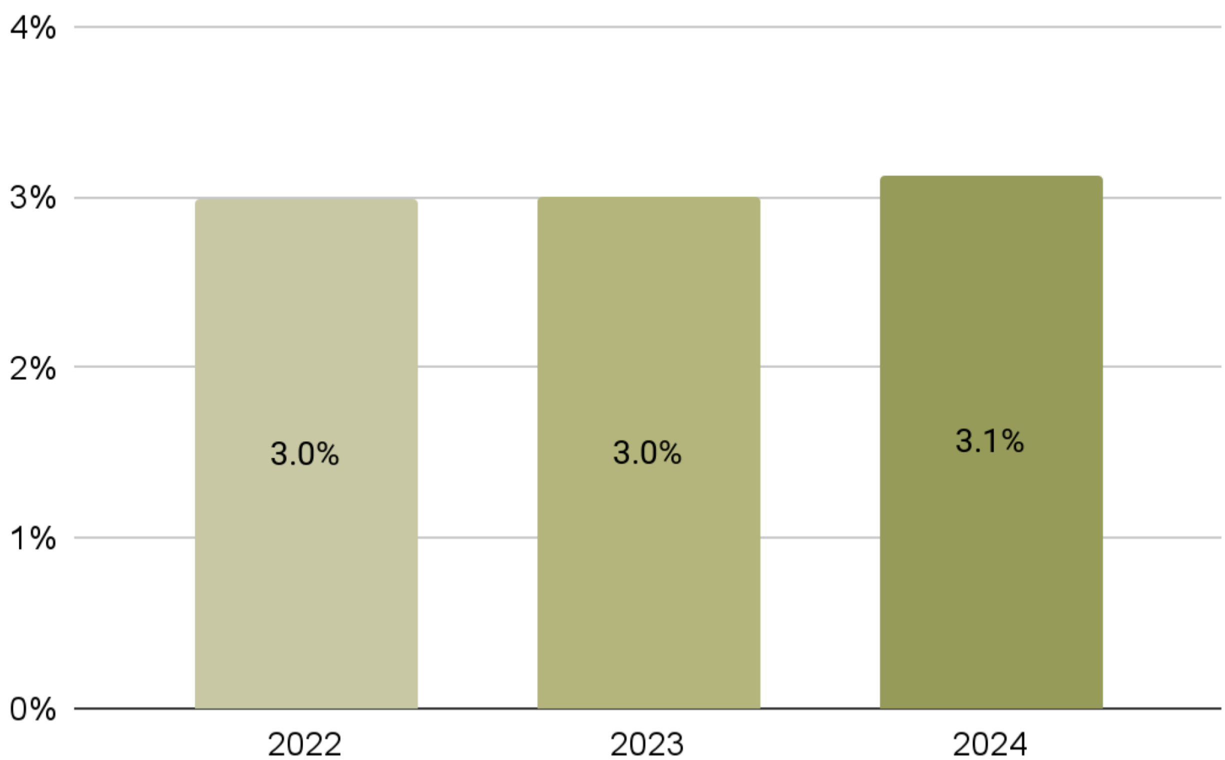


Market share

As a percentage of the total sales volume of plant- and animal-based pre-packaged meat products, plant-based meat had a market share of 3.0% in 2022, rising slightly to 3.1% in 2024.

This shows that while the plant-based meat market in Germany is more mature than in some other countries, it is not yet as mainstream as plant-based milk and drinks.

Plant-based meat: share of Germany's total (plant- and animal-based) pre-packaged meat market, 2022-2024 (% of sales volume)

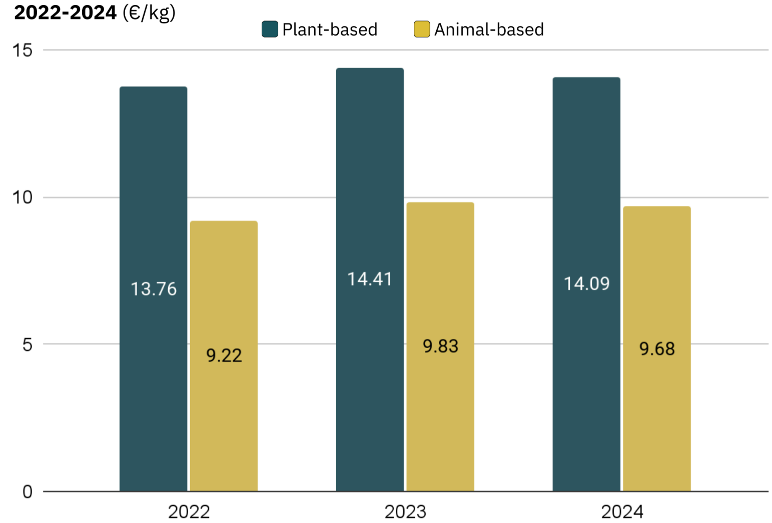


Price trends relative to animal equivalent

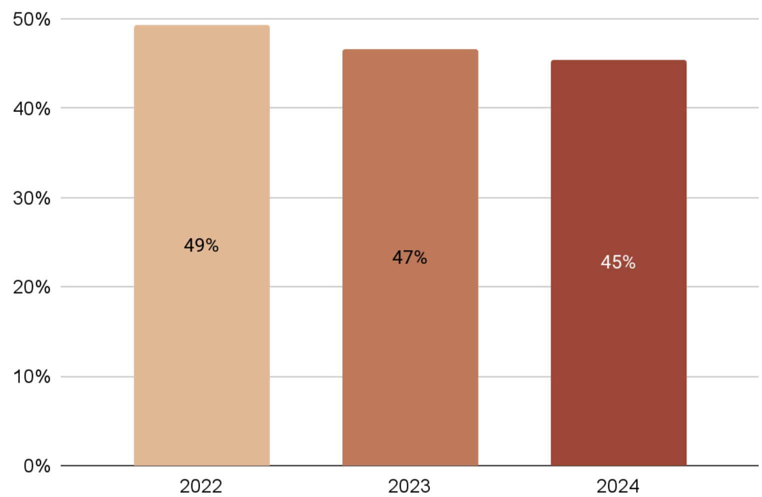
Plant-based meat has made slow but steady progress towards price parity with animal-based meat. While the average price per kg of both rose from 2022 to 2023, in line with inflation experienced in the wider German food sector, the price of plant-based meat has since fallen more than that of animal-based meat.

By 2024, plant-based meat was 45% more expensive than animal-based meat.

Average price per kg for plant-based and animal-based meat in Germany, 2022-2024 (€/kg)



Price difference for plant-based meat compared to animal-based meat in Germany, 2022-2024 (% difference based on €/kg)

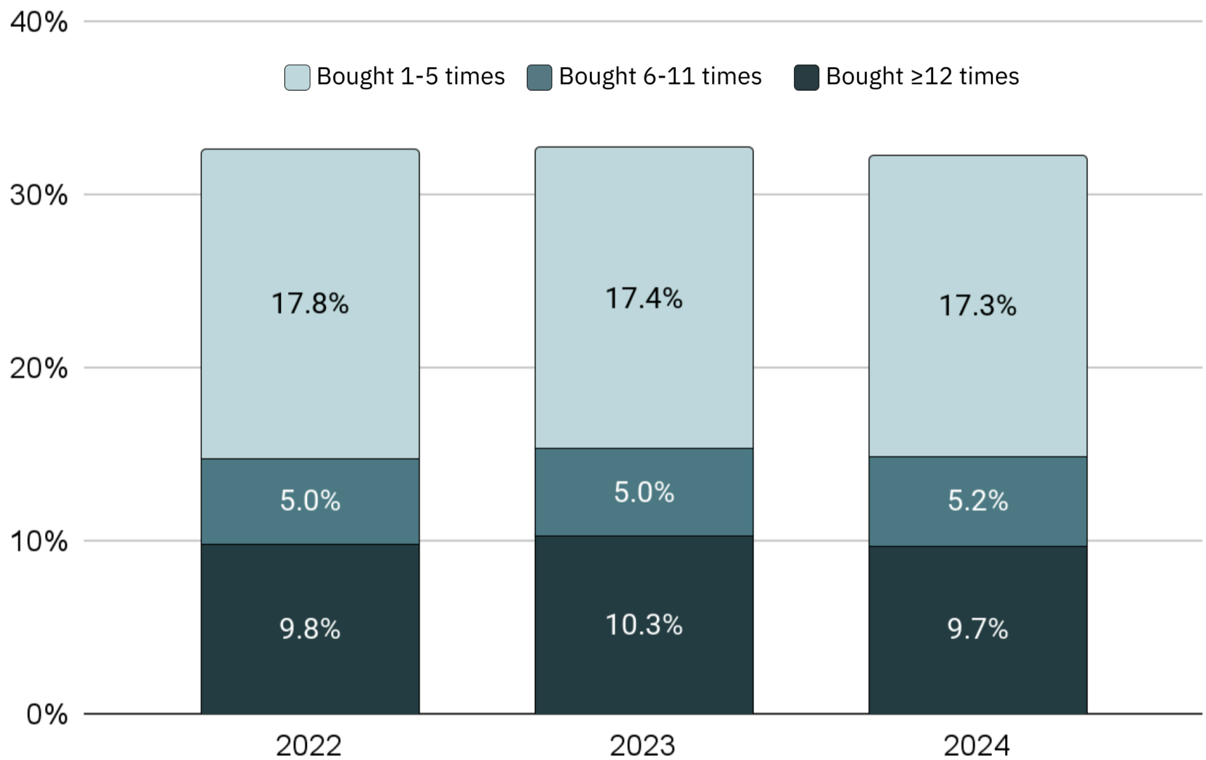


Household panel data

For a complementary view of purchase patterns, data from NIQ's Homescan consumer panel shows the frequency with which a representative panel of consumers in Germany brought home plant-based meat products. The two sources of data (NIQ Homescan and Circana's retail sales data) are not directly comparable, as they define the plant-based meat category differently. However, comparing the trends across the two sources allows some broad conclusions to be drawn.

The NIQ Homescan data shows that the proportion of households in Germany that bought plant-based meat at least once a year has remained roughly level, with a slight dip from 32.7% of households in 2023 to 32.2% in 2024. Between 2023 and 2024, the proportion of frequent purchasers (those who bought plant-based meat 12 or more times per year) dipped slightly from 10.3% to 9.7%.

Annual household purchase patterns for plant-based meat in Germany, 2022-2024 (% of households)

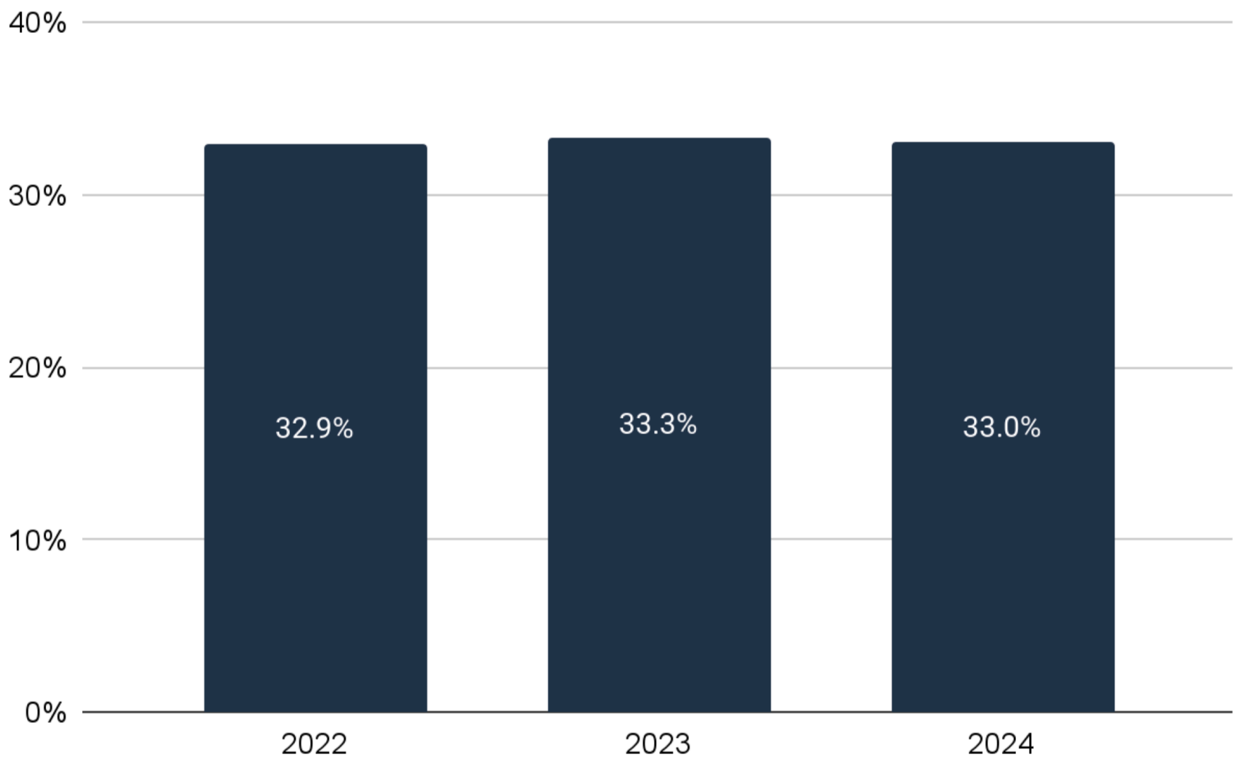


Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Germany. The data covers 'Take Home' shopping and comes from a sample of 20,000 households. Data covers "plant-based meat substitutes".

Overall, household purchase patterns have remained steady, suggesting that the rise in sales volume seen in the Circana retail sales data between 2023 and 2024 is likely to have come from existing frequent consumers buying more plant-based meat, rather than the category reaching a wider consumer base.

The NIQ Homescan data also shows that the proportion of plant-based meat's sales value that has come from discounter stores, such as Aldi and Lidl, has remained steady at around 33%.

Household purchase patterns for plant-based meat in Germany: proportion of sales value from discounter stores, 2022-2024 (%)



Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Germany. The data covers 'Take Home' shopping and comes from a sample of 20,000 households. Data covers "plant-based meat substitutes".

Plant-based seafood

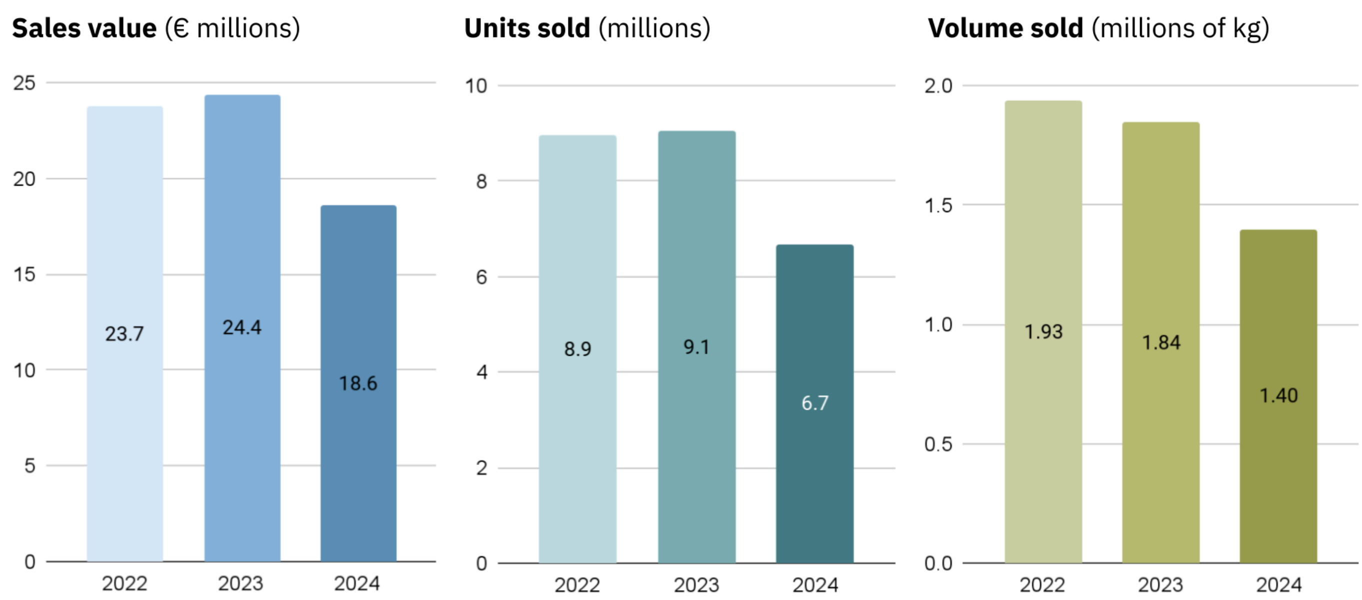
Total market

The market for plant-based seafood (eg, plant-based fish) in Germany has declined significantly, with the largest declines coming from a small number of products that may have been discontinued.

Following a peak in annual sales value at €24.4 million in 2023, sales value fell by 23.9% between 2023 and 2024. Similarly, unit sales fell by 26.2% to 6.7 million in 2024, from a peak of 9.1 million in 2023. Sales volume fell to 1.40 million kg in 2024, a 24.2% decrease relative to 2023.

As the plant-based seafood category is the smallest in this report, small changes in the market, such as the removal of some products, could have had a large influence on overall sales.

Plant-based seafood sales in Germany, 2022-2024



Branded versus private label

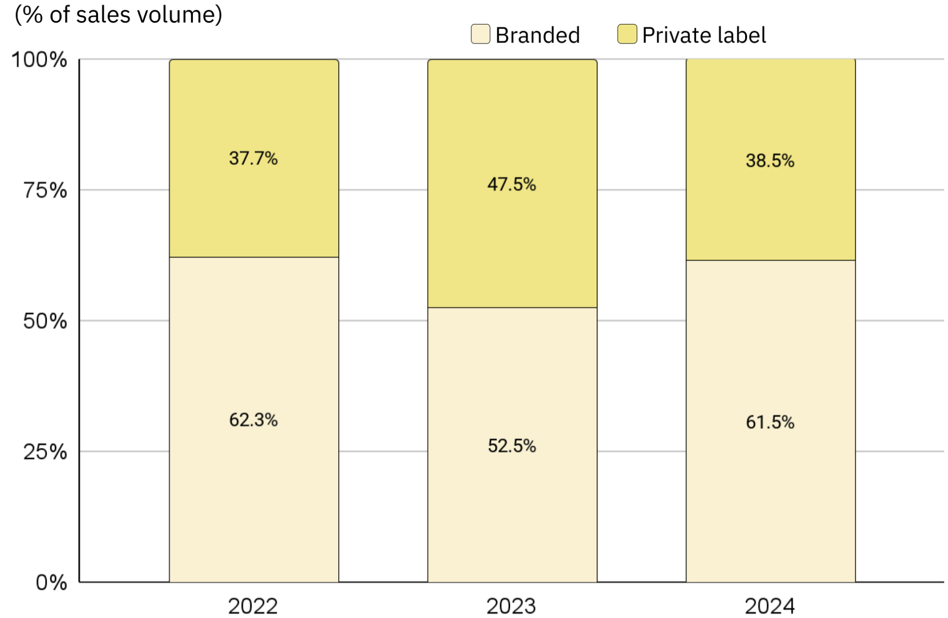
The proportion of private-label products jumped from 37.7% of sales volume in 2022 to 47.5% in 2023, before falling again to 38.5% in 2024.

The absolute decline in sales volume between 2023 and 2024 was 447,000kg. This was driven entirely by private-label products, which saw sales fall by 453,000kg, while branded products saw sales rise by 6,000kg.

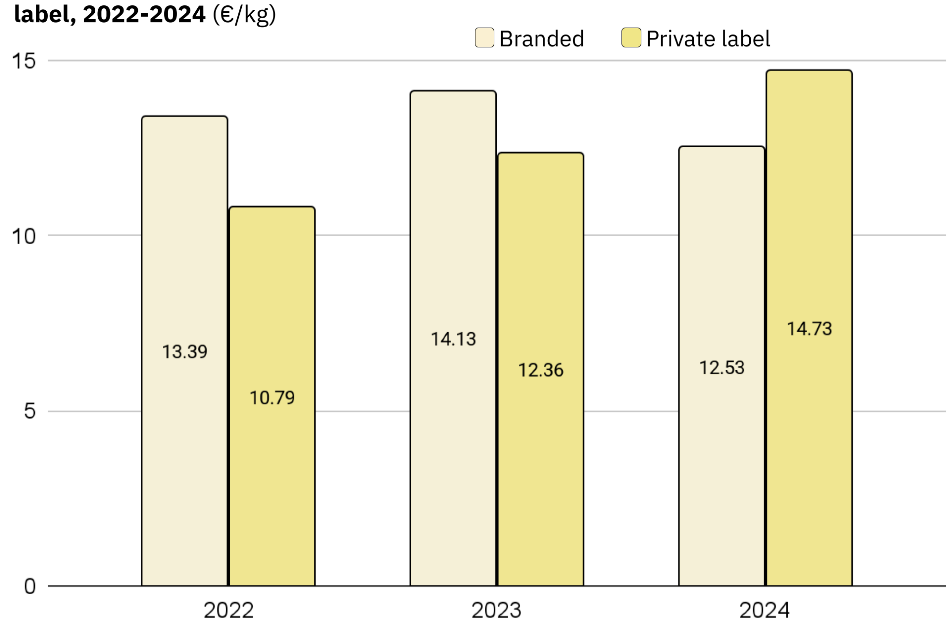
Unusually, the average price of private-label plant-based seafood exceeded that of branded products in 2024, which likely contributed to the fall in the proportion of private-label products.

It is likely that in this small, volatile category, retailers are still determining the optimum way to position and market private-label plant-based seafood products.

Germany plant-based seafood sales by branded or private label, 2022-2024
(% of sales volume)



Average price per kg of plant-based seafood in Germany, by branded or private label, 2022-2024 (€/kg)



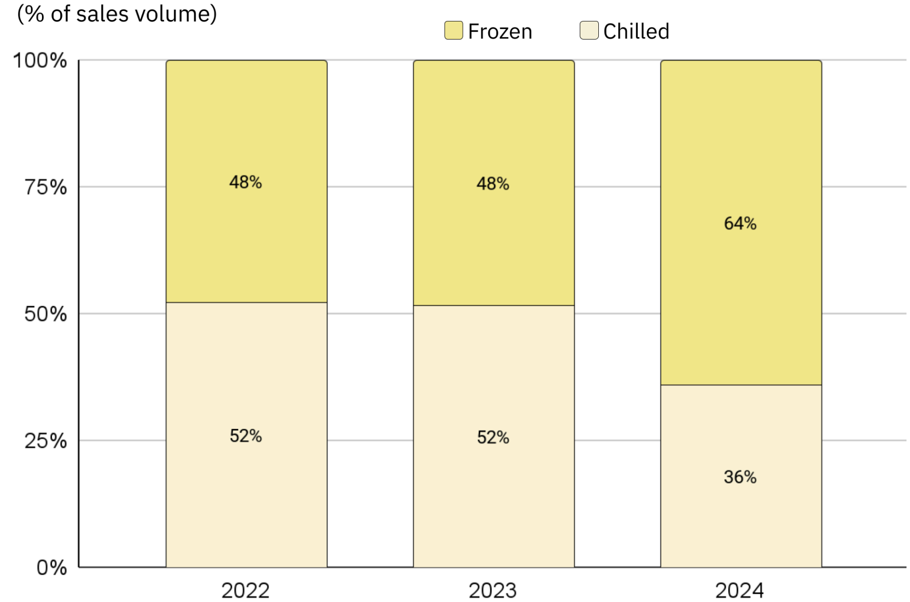
Product format breakdown

There is a clear shift towards frozen products, with their proportion of sales volume having risen from 48% in 2023 to 64% in 2024.

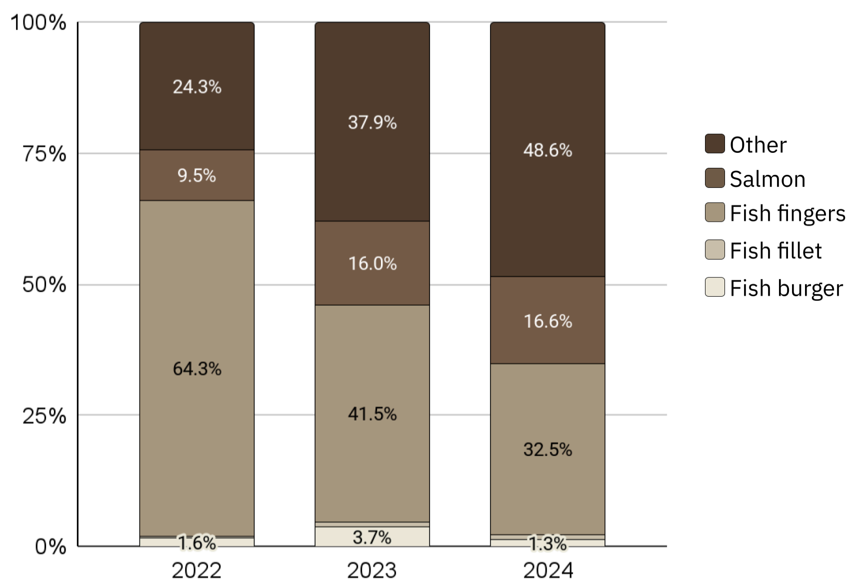
The relative affordability of frozen products (€9.15/kg in 2024, versus €20.57/kg for chilled products) is likely to have driven this trend.

There has been a large decline in both the absolute sales volume and the market share of plant-based fish fingers, which fell by 311,000kg between 2023 and 2024 (driving most of the decline in plant-based seafood sales). The greatest absolute fall in sales volume within the fish fingers segment was seen in private-label frozen products, which fell by 157,000kg in 2024.

Germany plant-based seafood sales by temperature, 2022-2024
(% of sales volume)



Germany plant-based seafood sales by format, 2022-2024 (% of sales volume)



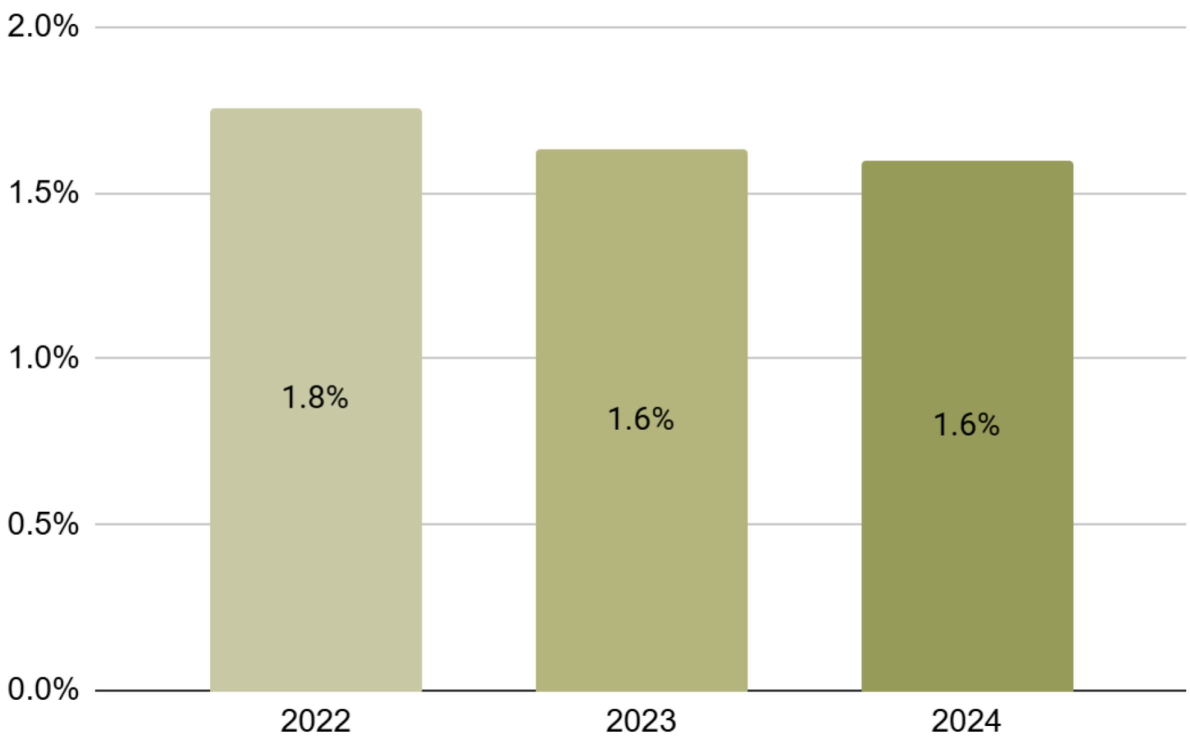
The “salmon” and “other” segments (as defined by Circana) have gained market share, but have nevertheless fallen in terms of absolute sales value between 2023 and 2024, following increases between 2022 and 2023.

Market share

The data available for animal-based fish and seafood from Circana covers only frozen products, not chilled. The market share below has therefore been calculated on the basis of only frozen plant-based seafood compared to frozen animal-based seafood.

Plant-based products accounted for 1.6% of the sales volume of frozen seafood in 2024, down slightly from 1.8% in 2022.

Frozen plant-based seafood: share of Germany's total (plant- and animal-based) frozen pre-packaged seafood market, 2022-2024 (% of sales volume)



Price trends relative to animal equivalent

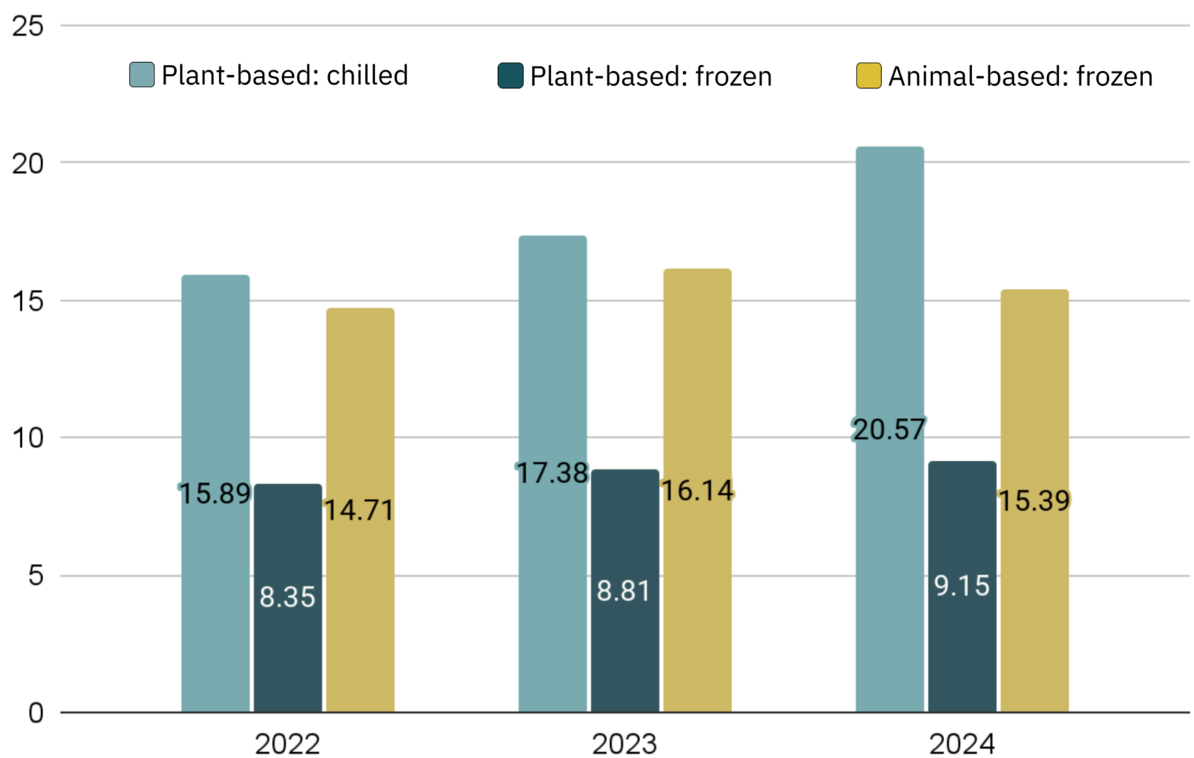
There is a clear difference between the price trends in chilled and frozen plant-based seafood products.

The price of chilled plant-based seafood products rose sharply between 2022 and 2024, and they are significantly more expensive than frozen plant-based seafood, with the gap growing over time.

Frozen plant-based seafood, on the other hand, is significantly cheaper per kg than frozen animal-based seafood. As animal-based seafood is generally a broad category containing many premium products, such as lobster, it is not particularly surprising that plant-based frozen products, dominated by formats such as fish fingers, are relatively affordable.

However, price alone does not appear to have been sufficient to drive sales, as the sales volume of frozen plant-based seafood fell by 3.5% between 2022 and 2024.

Average price per kg for plant-based and animal-based fish and seafood in Germany, 2022-2024 (€/kg)



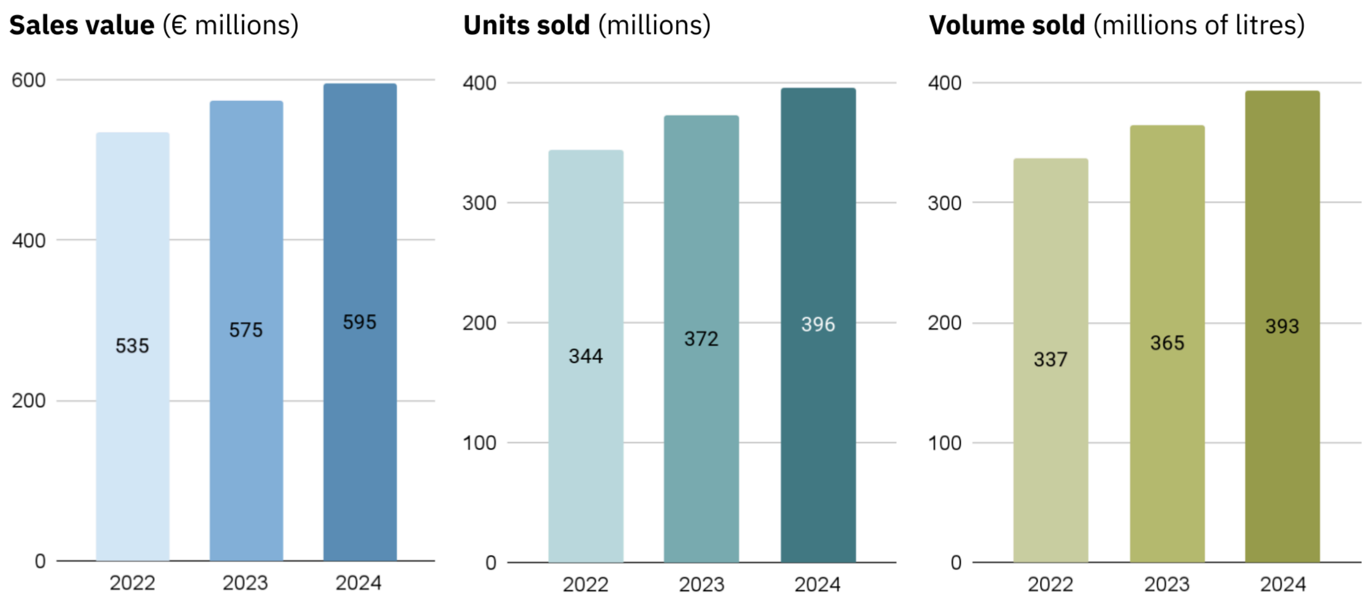
Plant-based milk and drinks

Total market

Germany's plant-based milk and drinks[2] market is growing.

The annual sales value of plant-based milk and drinks reached €595 million in 2024 – an increase of 3.6% compared to 2023 and 11.2% compared to 2022. Unit sales followed a similar pattern, reaching 396 million in 2024 – up 6.4% on 2023 and up 15.2% on 2022. Sales volume reached 393 million litres in 2024 – 7.6% higher than in 2023 and 16.6% higher than in 2022.

Plant-based milk and drinks sales in Germany, 2022-2024



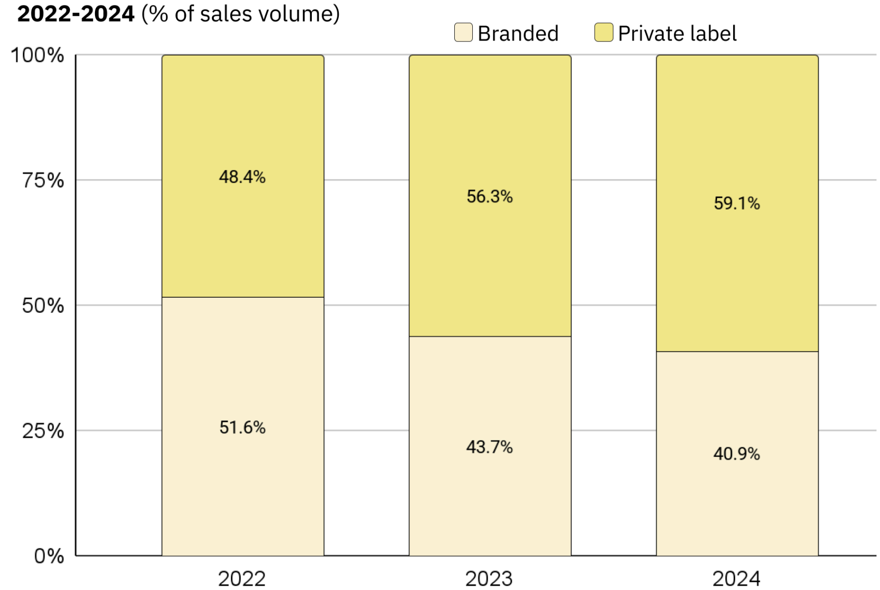
[2] The plant-based milk and drinks category includes plain and flavoured plant-based milks as well as some other drinks containing a dairy alternative component, such as coffee drinks. It does not include fruit juices or other drinks not designed to replicate dairy.

Branded versus private label

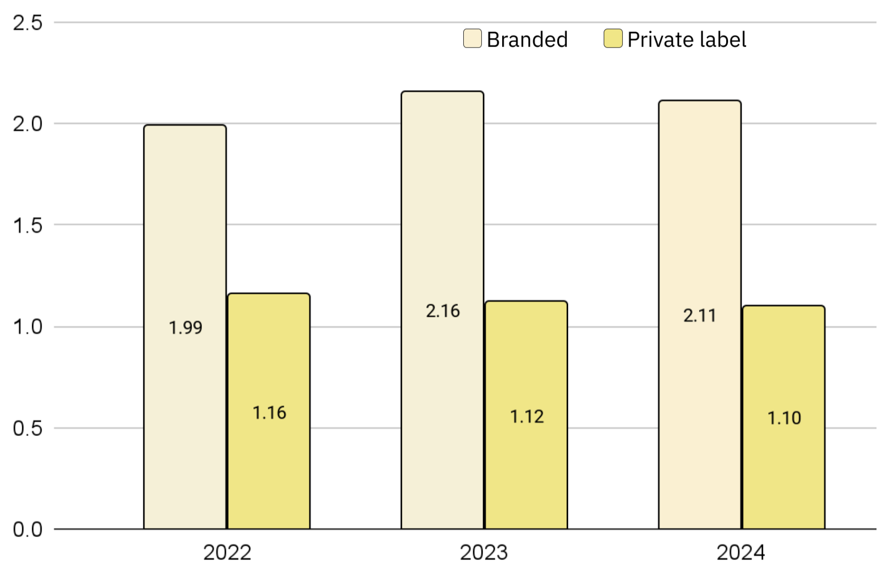
Private-label products play an important role in Germany's plant-based milk and drinks market, increasing from 48.4% of sales volume in 2022 to 59.1% in 2024.

This strong performance is likely to have been driven by their significantly lower price. Private-label products were 48% cheaper per litre than branded products, on average, in 2024 – up from 42% in 2022.

Germany plant-based milk and drinks sales by branded or private label, 2022-2024 (% of sales volume)



Average price per litre of plant-based milk and drinks in Germany, by branded or private label, 2022-2024 (€/l)

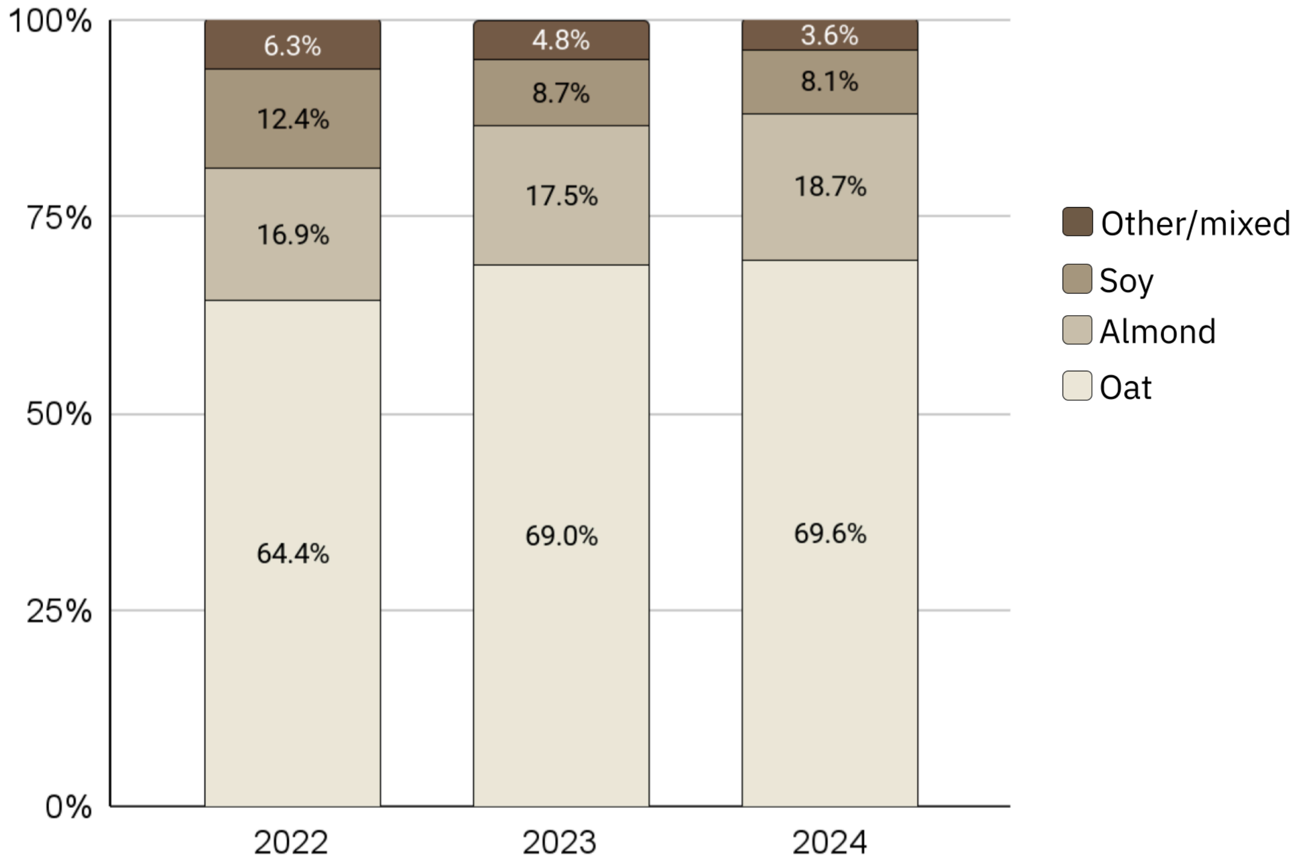


Product format breakdown

Oat milk has the greatest market share, reaching 69.6% of sales volume in 2024. Almond milk also gained market share between 2022 and 2024, while soy milk decreased in both absolute sales volume and market share over the same period.

The majority of plant-based milk and drinks for which Circana data is available are ambient, with less than 1% of sales volume coming from chilled products in 2024.

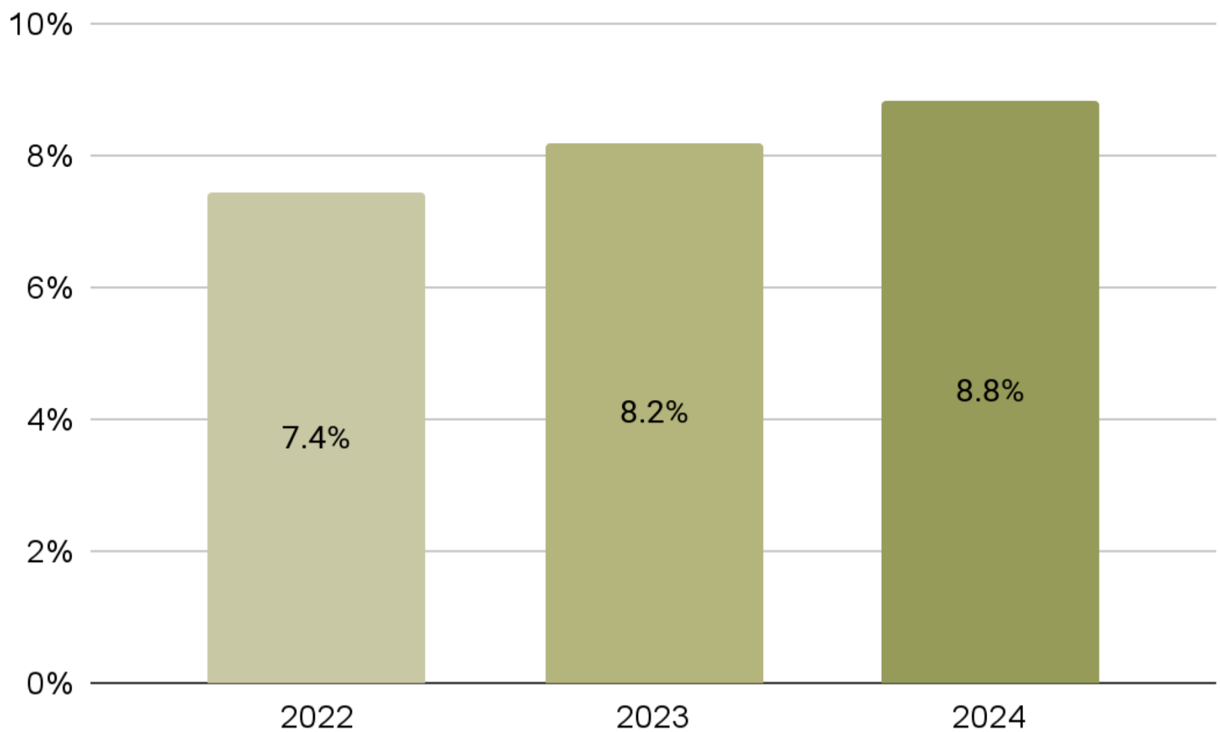
Germany plant-based milk and drinks sales by base ingredient, 2022-2024
(% of sales volume)



Market share

The market share of plant-based milk and drinks, as a proportion of total plant- and animal-based milk sales[3], increased from 7.4% of sales volume in 2022 to 8.8% in 2024. This shift was driven by a 56 million litre increase in plant-based sales between 2022 and 2024, alongside a 151 million litre decrease in animal-based milk sales over the same period. These trends show that plant-based milk and drinks are well-established and increasingly popular in Germany.

Plant-based milk and drinks: share of Germany's total (plant- and animal-based) milk and drinks market, 2022-2024 (% of sales volume)



[3] The animal-based component of this calculation includes fresh milk, milk mixed drinks and UHT (long-life) milk.

Price trends relative to animal equivalent

While the average price per litre of plant-based milk and drinks fell between 2022 and 2024, that of animal-based milk rose between 2022 and 2023 before falling again slightly.

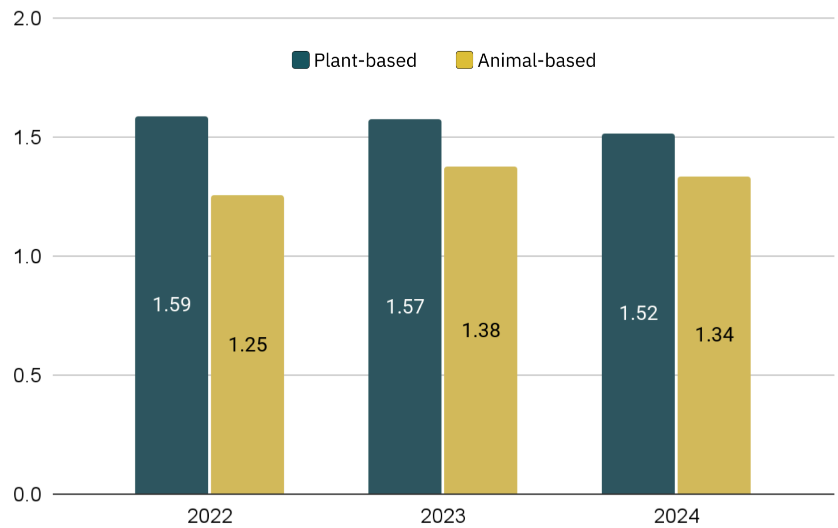
Plant-based milk and drinks were 13% more expensive per litre than animal-based milk in 2024, down from 27% in 2022.

Zooming in on private-label products, plant-based milk and drinks were actually 2.0% cheaper per litre than their animal-based counterparts in 2024.

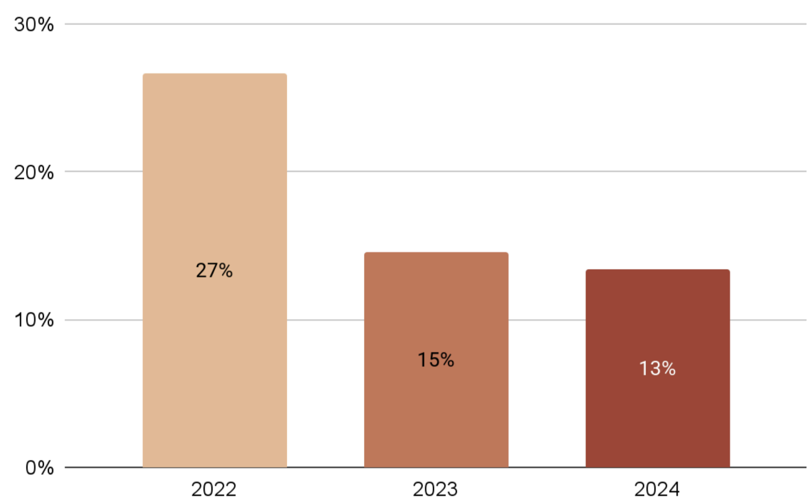
This progress on affordability is likely to have driven the rise in sales volume seen in private-label plant-based milk and drinks.

Note that in Germany, plant-based milk is taxed at 19%, while animal-based milk is taxed at only 7%. As the sales value data here already includes these taxes, it is likely that if the products were taxed equally, plant-based milk and drinks could be roughly the same price as animal-based milk.

Average price per kg for plant-based and animal-based milk and drinks in Germany, 2022-2024 (€/l)



Price difference for plant-based milk and drinks compared to animal-based milk and drinks in Germany, 2022-2024 (% difference based on €/l)

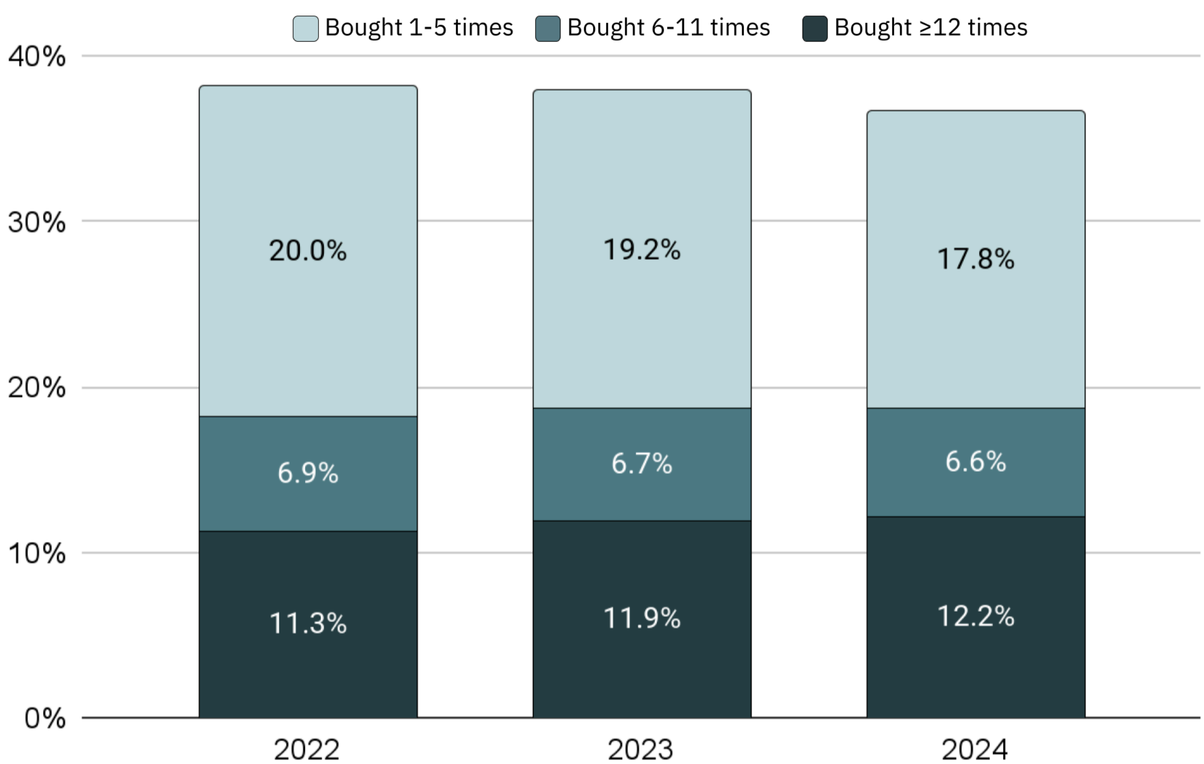


Household panel data

Household panel data from NIQ Homescan shows that the proportion of households in Germany that purchased plant-based milk on at least one occasion per year fell from 38.2% in 2022 to 36.6% in 2024. The proportion of occasional purchasers (1-5 times per year) also fell.

However, the proportion of frequent purchasers – those who bought 12 times or more per year – rose from 11.3% in 2022 to 12.2% in 2024. This shows that the increase in sales volume shown by the Circana retail sales data is likely to have come from more frequent purchases among existing consumers, perhaps driven by better affordability, rather than from new consumers switching to plant-based milk and drinks.

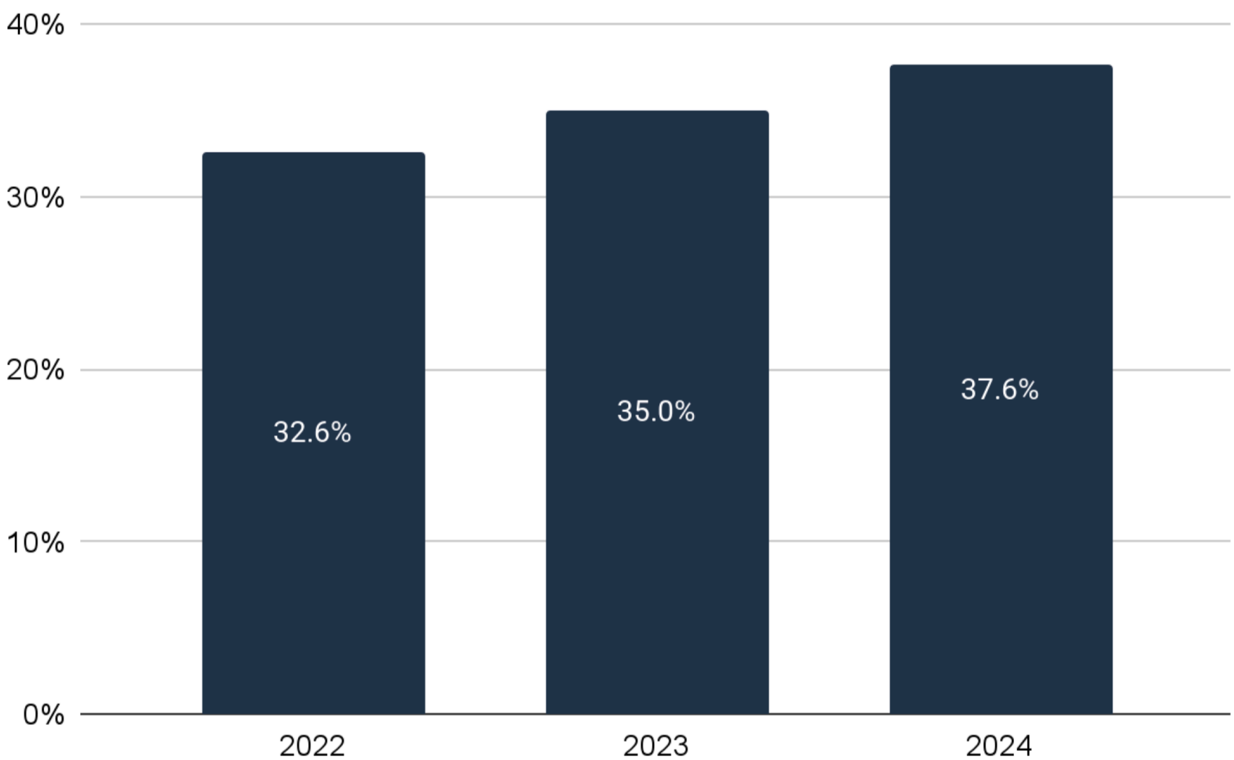
Annual household purchase patterns for plant-based milk in Germany, 2022-2024 (% of households)



Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Germany. The data covers 'Take Home' shopping and comes from a sample of 20,000 households. Data covers "plant-based milk".

The NIQ Homescan data also shows that the proportion of sales value from discounter stores (such as Aldi and Lidl) increased from 32.6% in 2022 to 37.6% in 2024. While both mainstream supermarkets and discounter stores offer private-label products, this shift towards discounters does align with the trend towards cheaper products shown by the Circana retail sales data.

Household purchase patterns for plant-based milk in Germany: proportion of sales value from discounter stores, 2022-2024 (%)



Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Germany. The data covers 'Take Home' shopping and comes from a sample of 20,000 households. Data covers "plant-based milk".

Plant-based cheese

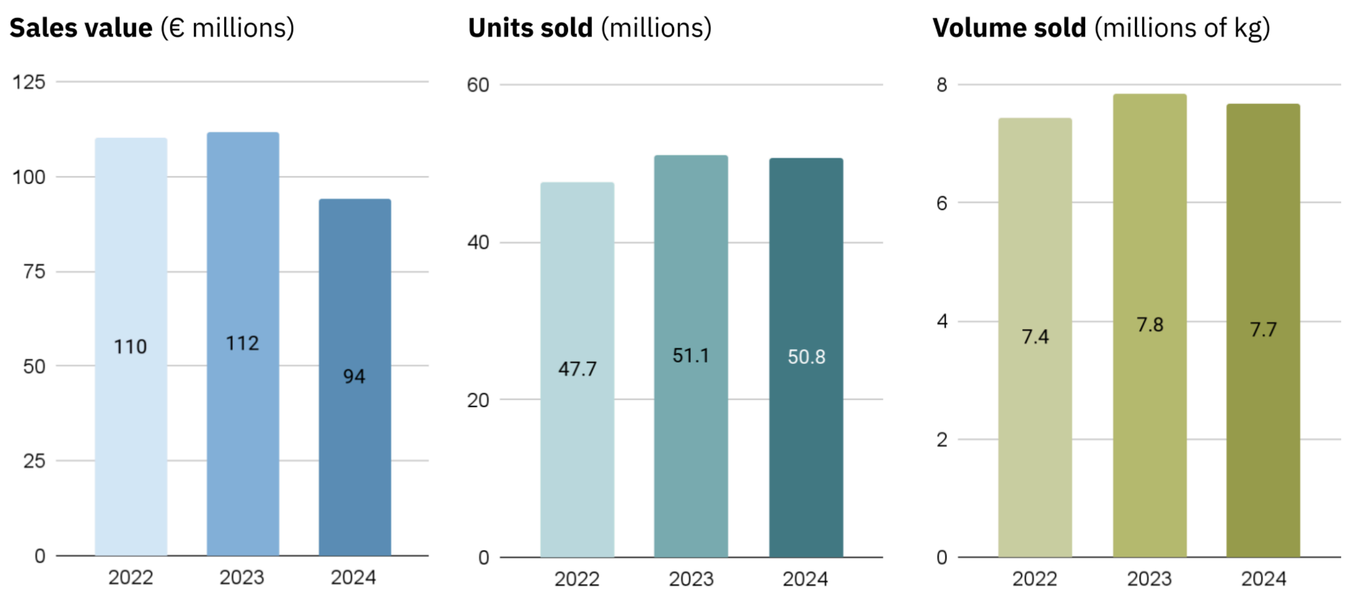
Total market

Germany’s plant-based cheese market appears to have slowed after a peak in 2023.

Annual sales value fell from €112 million in 2023 to €94 million in 2024. This 15.7% drop in sales value was considerably higher than the equivalent drop in unit sales and sales volume, indicating that falling prices were a primary driver.

Unit sales grew by 7.2% between 2022 and 2023 and then remained roughly level, at 50.8 million units in 2024. Sales volume, meanwhile, grew by 5.4% between 2022 and 2023, before falling by 2.1% between 2023 and 2024, reaching 7.7 million kg.

Plant-based cheese sales in Germany, 2022-2024



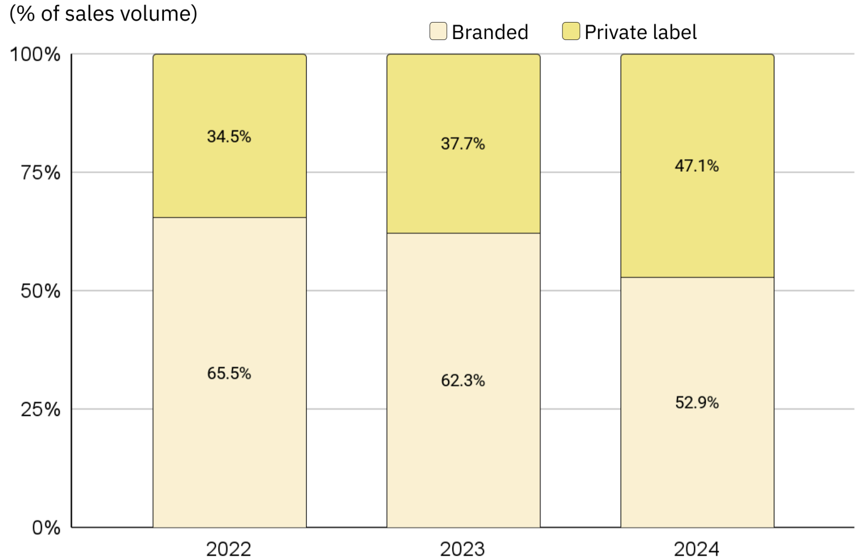
Branded versus private label

Private-label products account for a large and growing proportion of Germany's plant-based cheese market, rising from 34.5% of sales volume in 2022 to 47.1% in 2024.

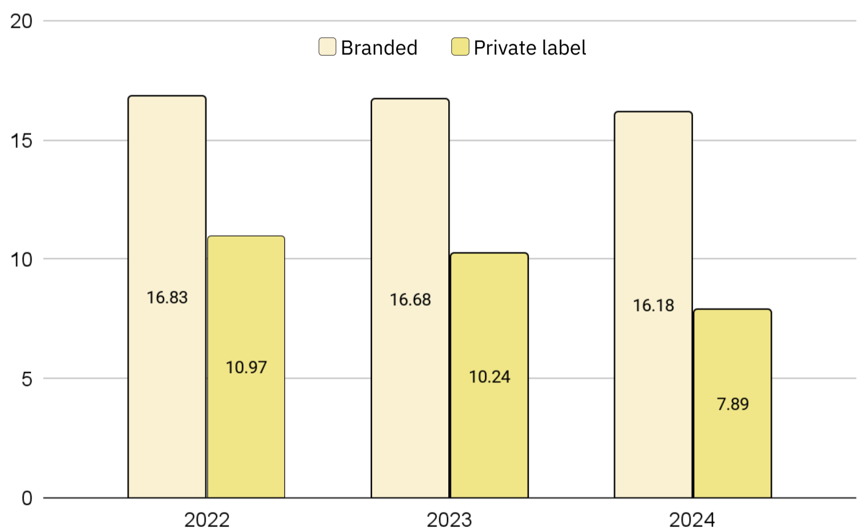
While overall plant-based cheese sales volume declined slightly between 2023 and 2024, sales of private-label products saw a 22% increase in volume over the same period. The sales volume of branded products fell by 17% during this time.

This growth of private-label products is likely to have been driven by their significantly lower price. In 2024, private-label products were 51% cheaper per kg, on average, than branded products – up from 35% in 2022.

Germany plant-based cheese sales by branded or private label, 2022-2024 (% of sales volume)



Average price per kg of plant-based cheese in Germany, by branded or private label, 2022-2024 (€/kg)

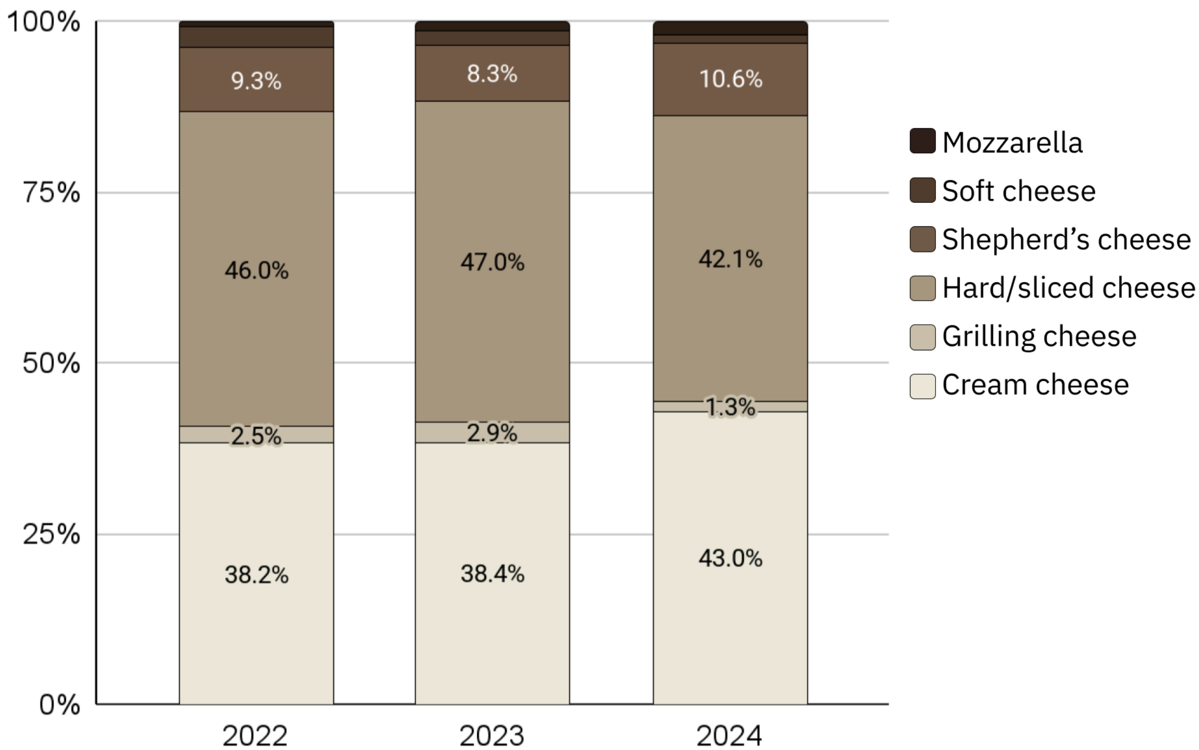


Product format breakdown

The majority of plant-based cheese for which data is available in Germany is chilled, accounting for over 99% of sales volume in 2024.

Cream cheese and hard/sliced cheese are the most popular product formats, followed by shepherd's cheese[4]. Cream cheese grew to 43.0% of sales volume in 2024, while the market share of hard/sliced cheese fell.

Germany plant-based cheese sales by type, 2022-2024 (% of sales volume)



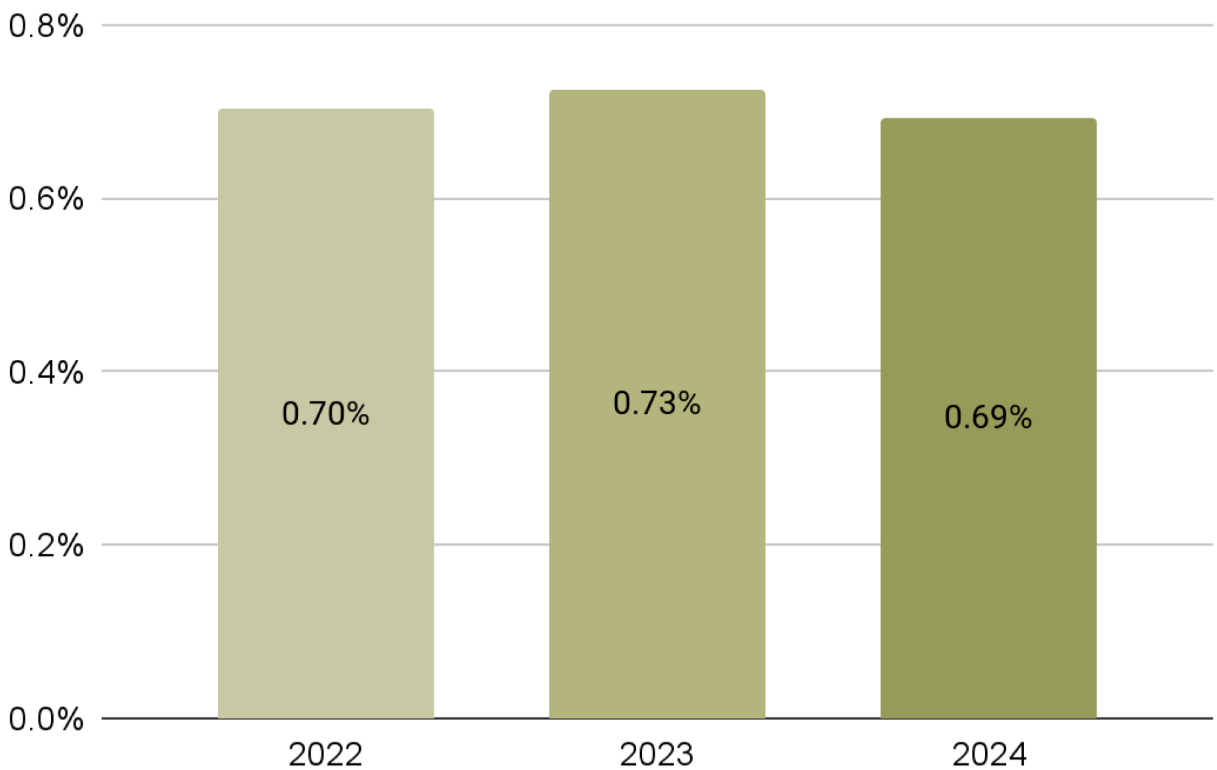
[4] *Hirtenkäse*, a German term used to describe a category of cheese in brine, such as feta.

Market share

The market share of plant-based cheese, as a percentage of the sales volume of both plant- and animal-based cheese, peaked at 0.73% in 2023 before falling to 0.69% in 2024, driven by a slight contraction in the plant-based cheese market and by slightly higher sales of animal-based cheese.

This decrease in market share, despite the improved affordability of plant-based cheese, suggests that other factors such as taste are also important in driving consumer choice.

Plant-based cheese: share of Germany's total (plant- and animal-based) cheese market, 2022-2024 (% of sales volume)

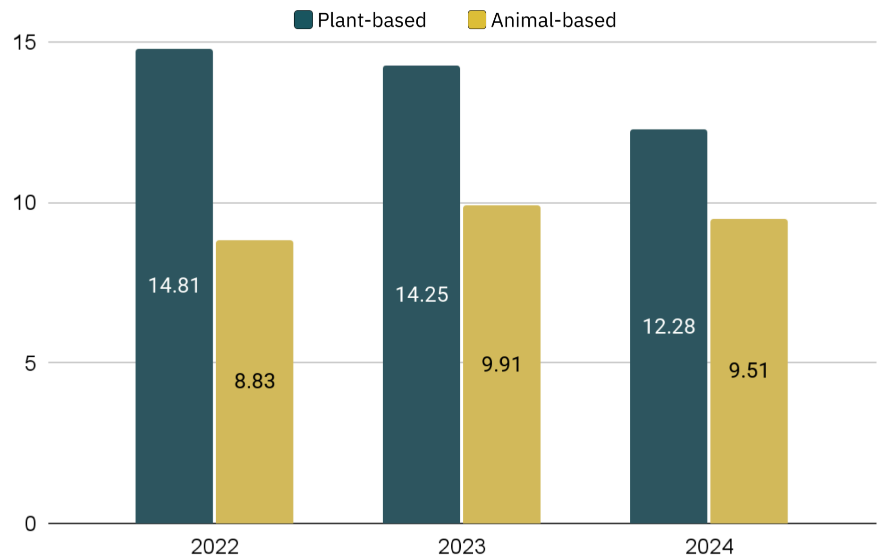


Price trends relative to animal equivalent

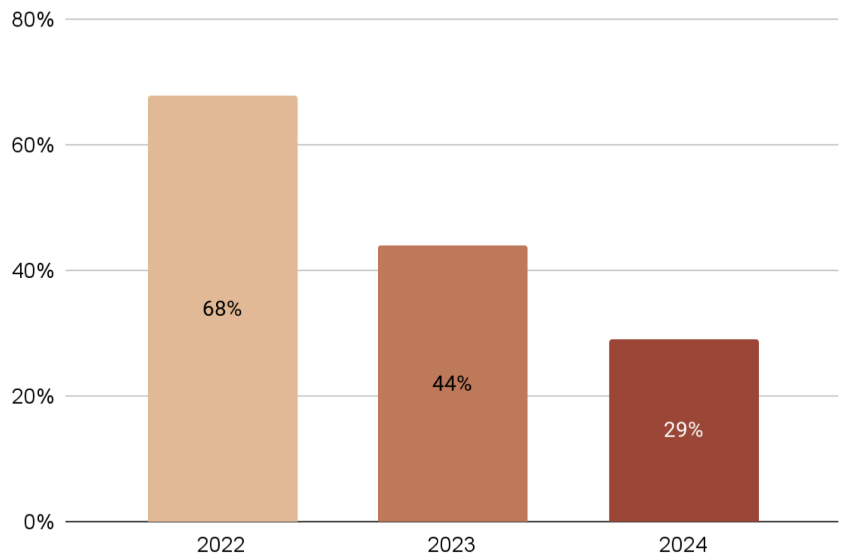
While animal-based cheese became more expensive between 2022 and 2024 (with a peak in 2023), the price of plant-based cheese declined, driven mainly by cheaper private-label products.

As a result, while plant-based cheese was 68% more expensive per kg than animal-based cheese in 2022, that gap fell to 29% by 2024.

Average price per kg for plant-based and animal-based cheese in Germany, 2022-2024 (€/kg)



Price difference for plant-based cheese compared to animal-based cheese in Germany, 2022-2024 (% difference based on €/kg)



Plant-based yoghurt

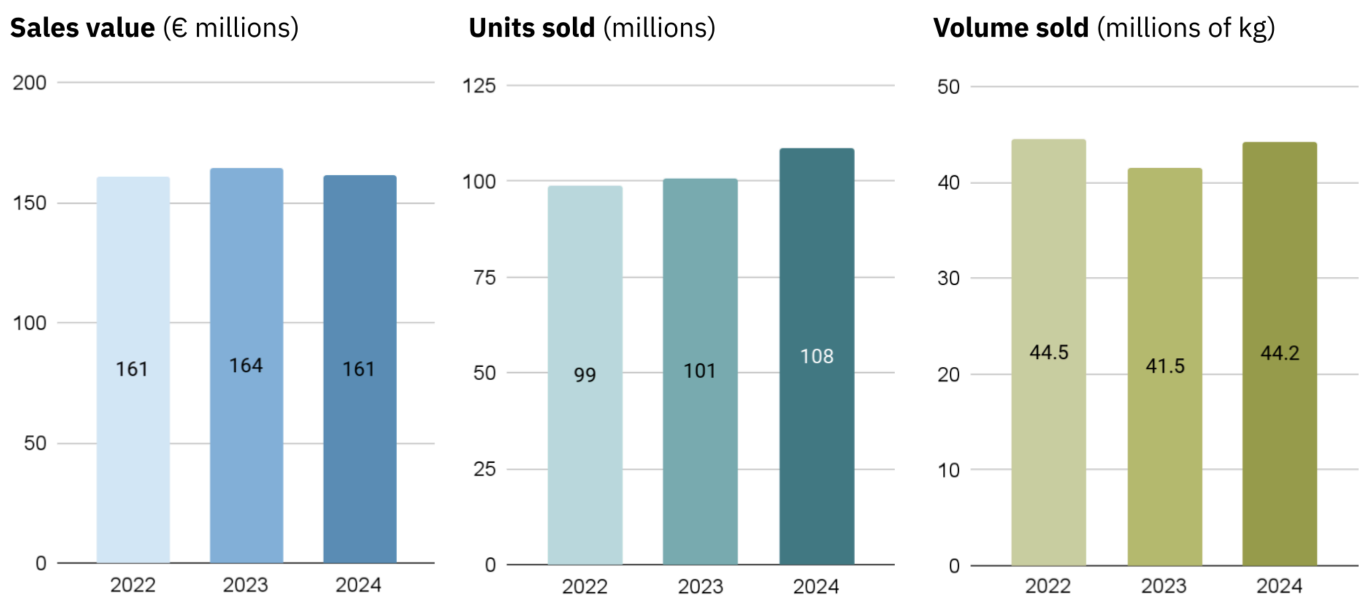
Total market

Demand for plant-based yoghurt is rebounding in Germany.

Annual sales value remained roughly steady between 2022 and 2024, at €161 million in 2024. Unit sales, after a plateau between 2022 and 2023, rose by 7.6% between 2023 and 2024, reaching 108 million units. Sales volume dipped by 6.7% from 2022 to 2023, before rebounding by 6.5% between 2023 and 2024, reaching 44.2 million kg.

The difference between the trends in sales value and sales volume can be explained by products becoming cheaper on average, particularly private-label options.

Plant-based yoghurt sales in Germany, 2022-2024

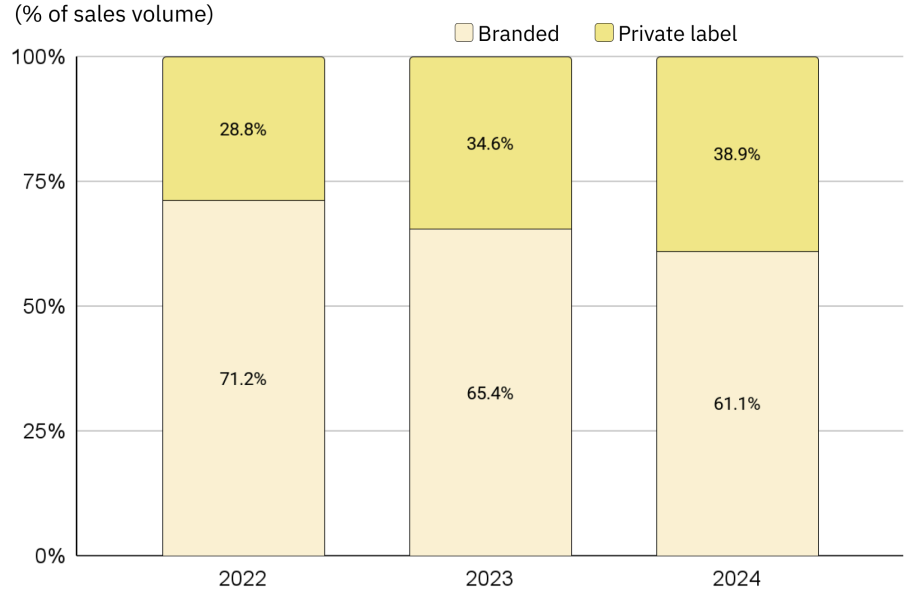


Branded versus private label

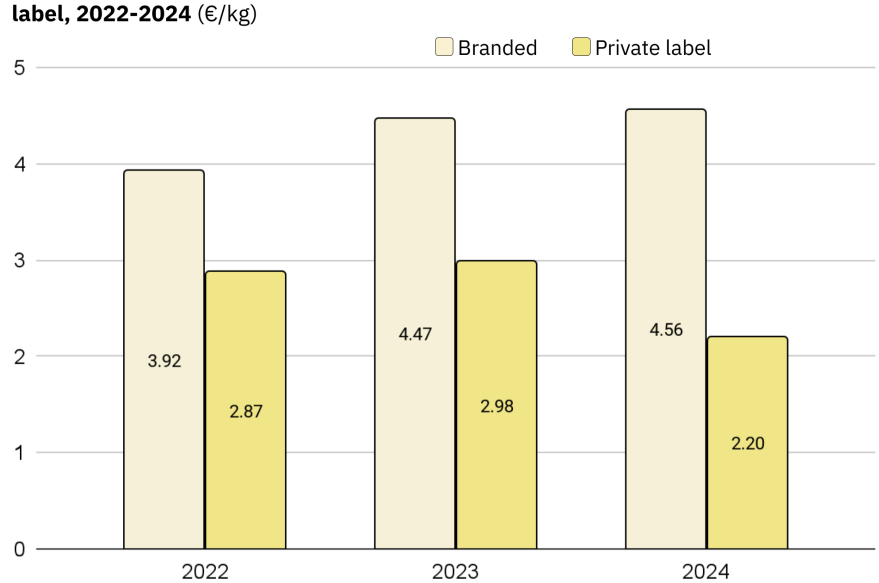
Private-label products' share of overall plant-based yoghurt sales volume rose to 38.9% in 2024, most likely driven by improvements in price.

In 2022, private-label products were 27% cheaper per kg than branded products on average, and by 2024 they were 52% cheaper. This trend was driven partly by ongoing increases in the price of branded products, and partly by a large drop in private-label prices between 2023 and 2024.

Germany plant-based yoghurt sales by branded or private label, 2022-2024
(% of sales volume)



Average price per kg of plant-based yoghurt in Germany, by branded or private label, 2022-2024 (€/kg)

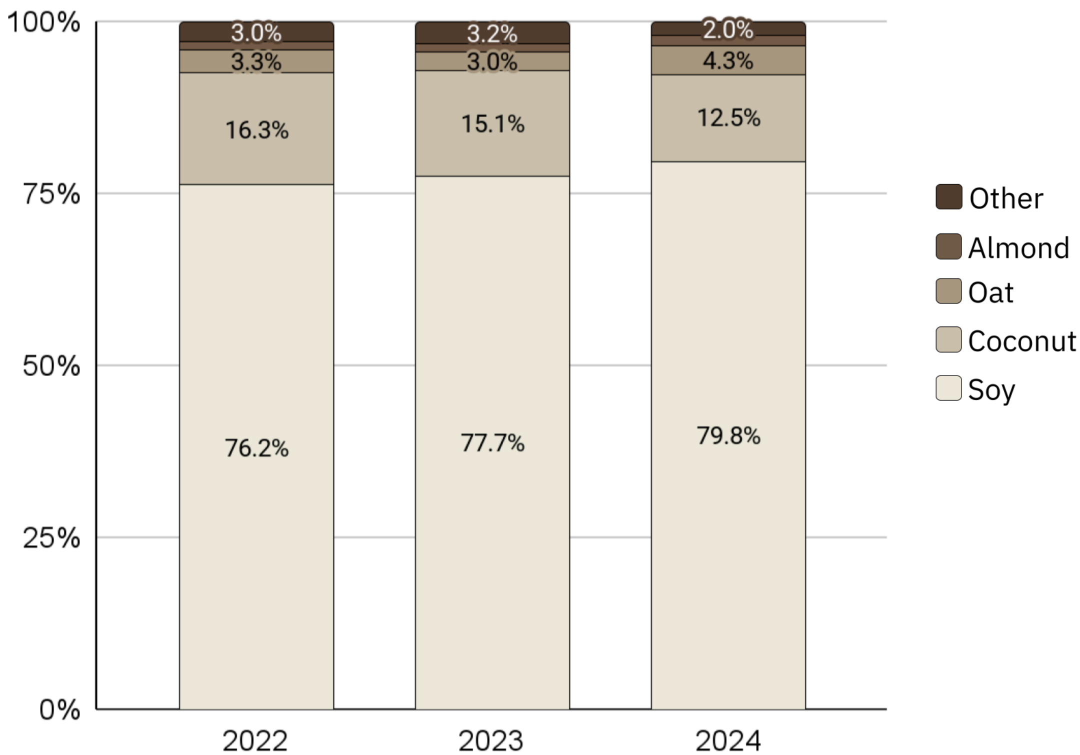


Product format breakdown

The vast majority of plant-based yoghurt covered by the Circana data is chilled as opposed to ambient, at over 98% of sales volume between 2022 and 2024.

Soy is by far the best-selling type of plant-based yoghurt, reaching a market share of 79.8% in 2024. Soy is also cheaper (€3.58/kg in 2024) than coconut (€3.67/kg), almond (€3.74/kg) or oat yoghurt (€4.45).

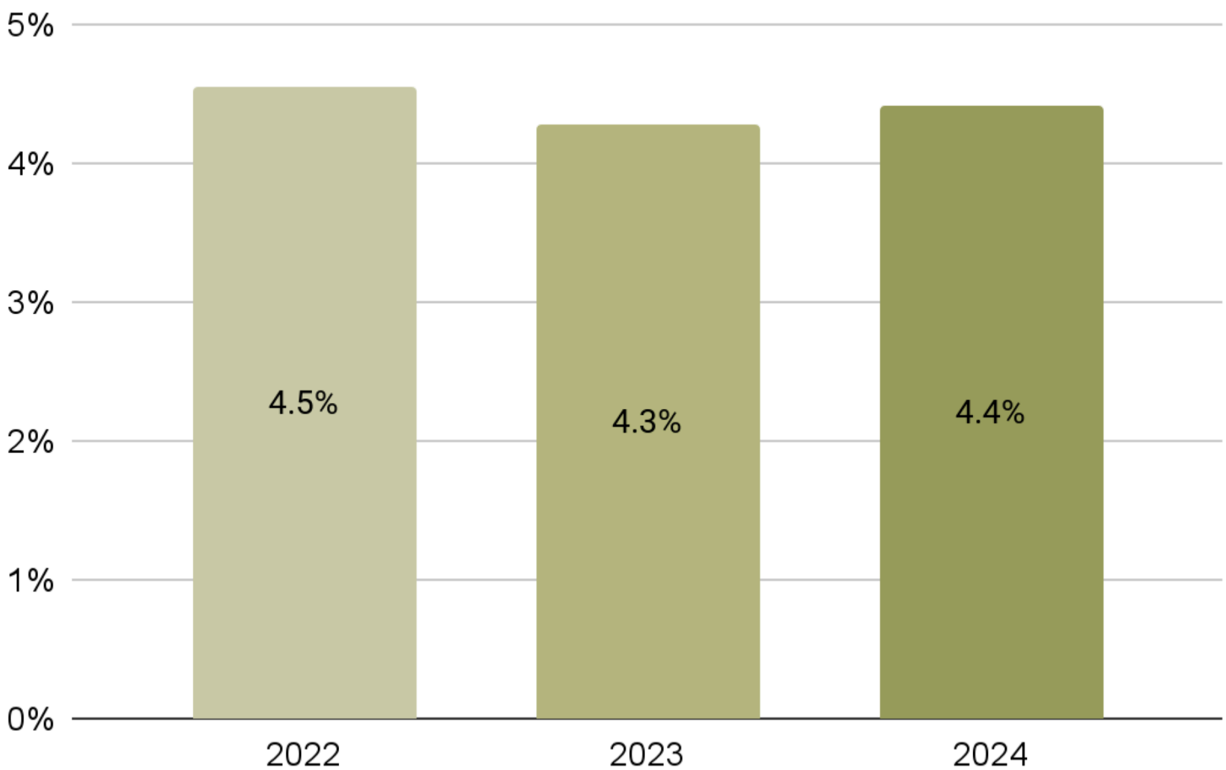
Germany plant-based yoghurt sales by ingredient base, 2022-2024
(% of sales volume)



Market share

The market share of plant-based yoghurt, as a percentage of total plant- and animal-based yoghurt sales volume, dipped slightly in 2023 but rose again to 4.4% in 2024.

Plant-based yoghurt: share of Germany's total (plant- and animal-based) yoghurt market, 2022-2024 (% of sales volume)

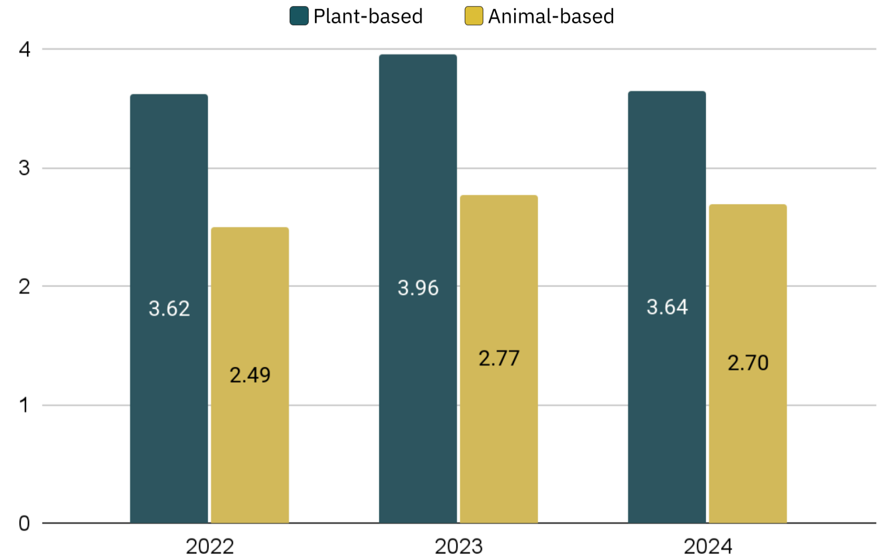


Price trends relative to animal equivalent

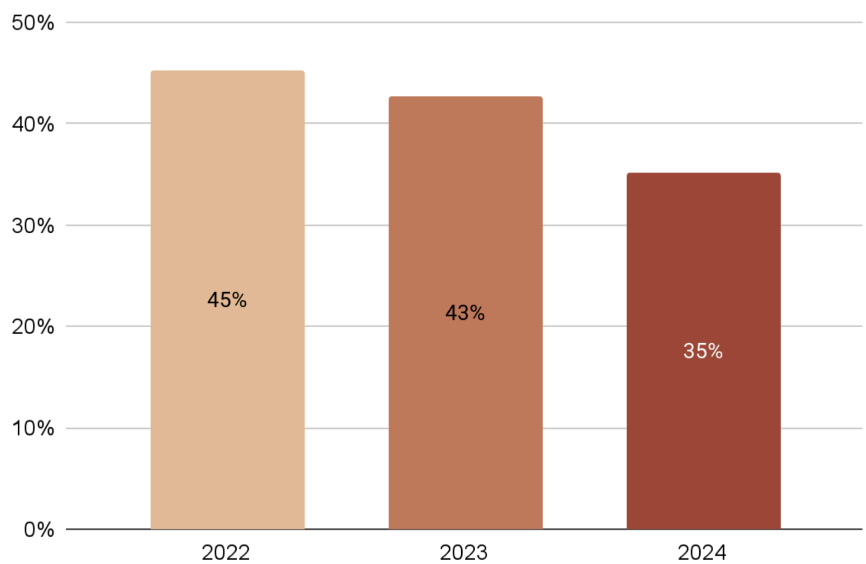
While the prices of both plant- and animal-based yoghurt rose between 2022 and 2023, in line with high inflation across the food sector, the price of plant-based yoghurt has since fallen, driven by cheaper private-label options.

The price of animal-based yoghurt has not fallen as much, meaning that the price gap between the two has fallen over time. In 2024, plant-based yoghurt was 35% more expensive per kg than animal-based yoghurt. This progress on affordability may have contributed to the uptick in sales volume between 2023 and 2024.

Average price per kg for plant-based and animal-based yoghurt in Germany, 2022-2024 (€/kg)



Price difference for plant-based yoghurt compared to animal-based yoghurt in Germany, 2022-2024 (% difference based on €/kg)



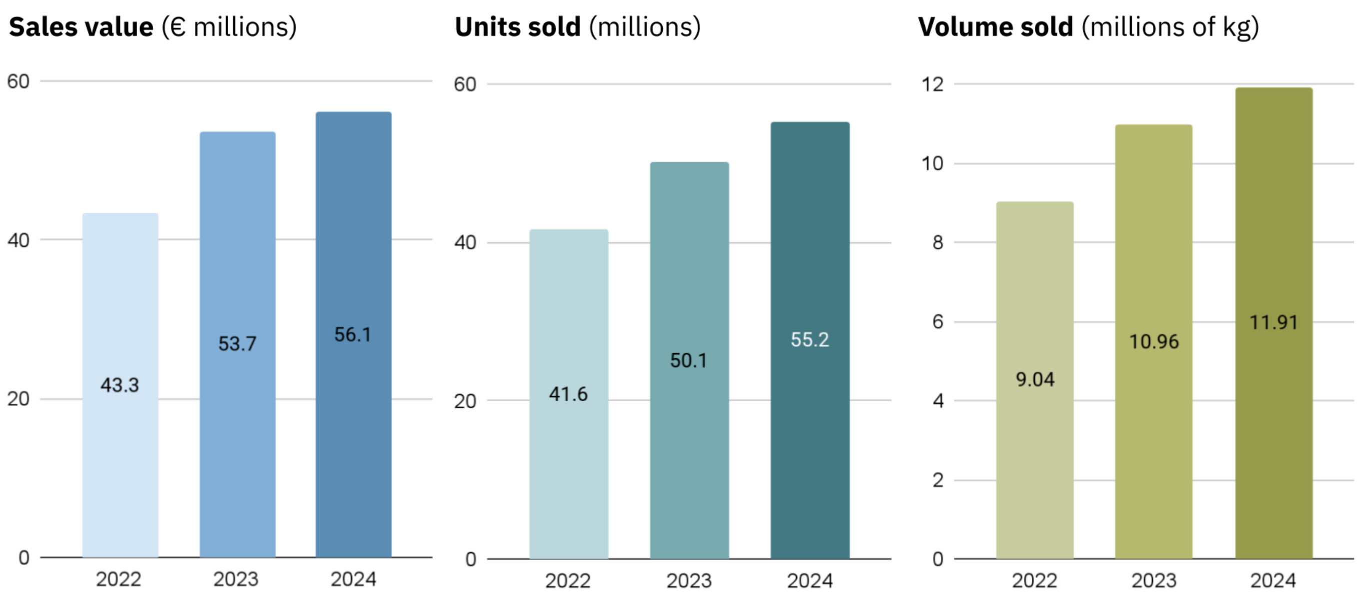
Plant-based cream

Total market

The plant-based cream market in Germany is continuing to grow, driven by private-label products.

Annual sales value reached €56.1 million in 2024 – 4.5% higher than in 2023 and 29.5% higher than in 2022. Unit sales also rose, reaching 55.2 million in 2024 (up 10.4% on 2023 and up 32.9% on 2022). Sales volume[5] reached around 11.9 million kg in 2024, an increase of 8.7% relative to 2023 and an increase of 31.7% compared to 2022.

Plant-based cream sales in Germany, 2022-2024



[5] Circana's dataset uses a combination of kg and litres when measuring the sales volume of cream, and it was not possible to see the proportions that were measured with each unit. To produce a combined sales volume, we have assumed that one litre is roughly equal to one kg.

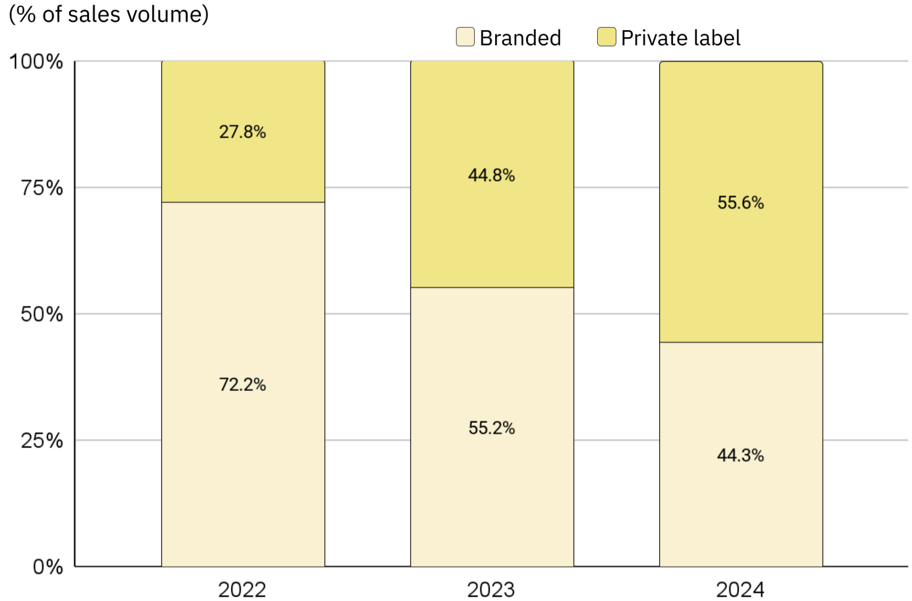
Branded versus private label

Sales of private-label products have grown rapidly, rising from 27.8% of sales volume in 2022 to 55.6% in 2024.

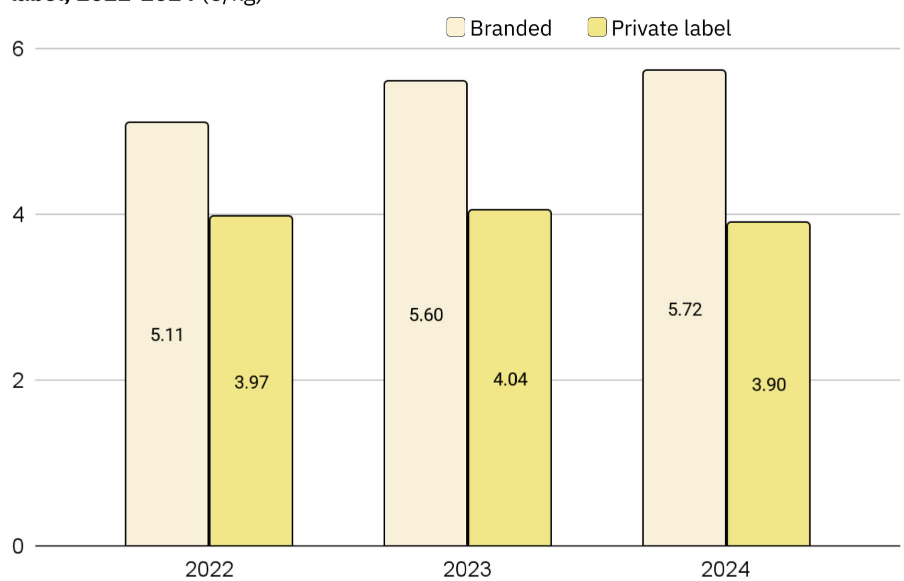
The absolute sales volume of branded plant-based cream fell by 1.2 million kg between 2022 and 2024, while that of private-label products rose by 4.1 million kg.

Private-label products are cheaper than branded ones. On average, private-label products were 22% cheaper per kg in 2022, and 32% cheaper in 2024.

Germany plant-based cream sales by branded or private label, 2022-2024
(% of sales volume)



Average price per kg of plant-based cream in Germany, by branded or private label, 2022-2024 (€/kg)



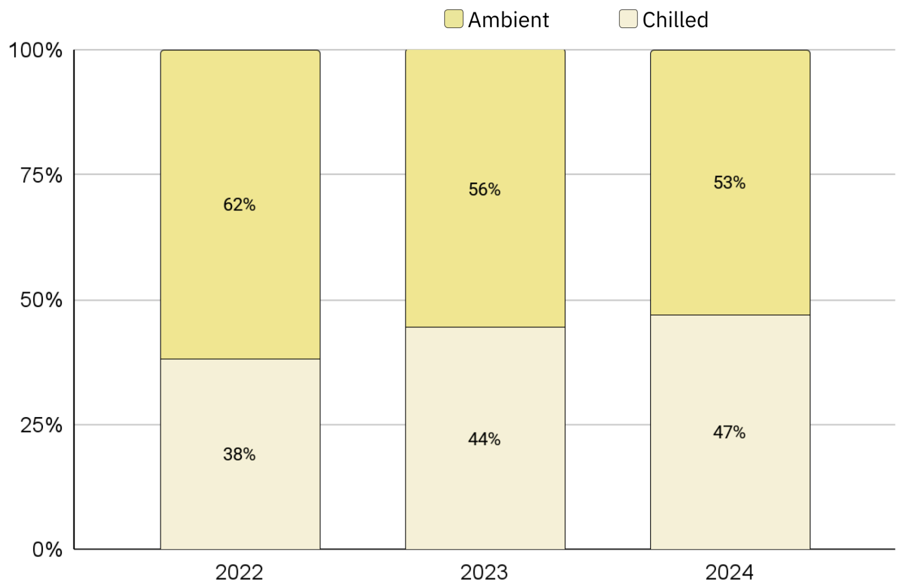
Product format breakdown

Chilled plant-based cream grew from 38% of sales volume in 2022 to 47% in 2024, although both chilled and ambient products grew in absolute sales volume. Chilled products were slightly more expensive (€4.77/kg) than ambient products (€4.66/kg) in 2024.

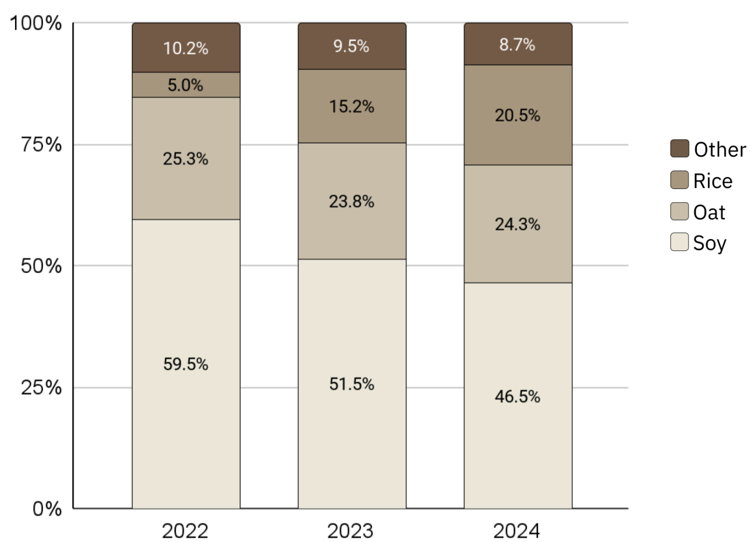
Soy cream has been losing market share, but its sales volume in 2024 was nevertheless higher than in 2022 due to overall market growth.

There has been rapid growth in the market share and absolute sales volume of plant-based cream made from rice. Rice cream is also one of the most affordable options on the market, costing an average of €3.42/kg in 2024, compared to €5.20/kg for soy cream and €4.57/kg for oat cream.

Germany plant-based cream sales by temperature, 2022-2024 (% of sales volume)

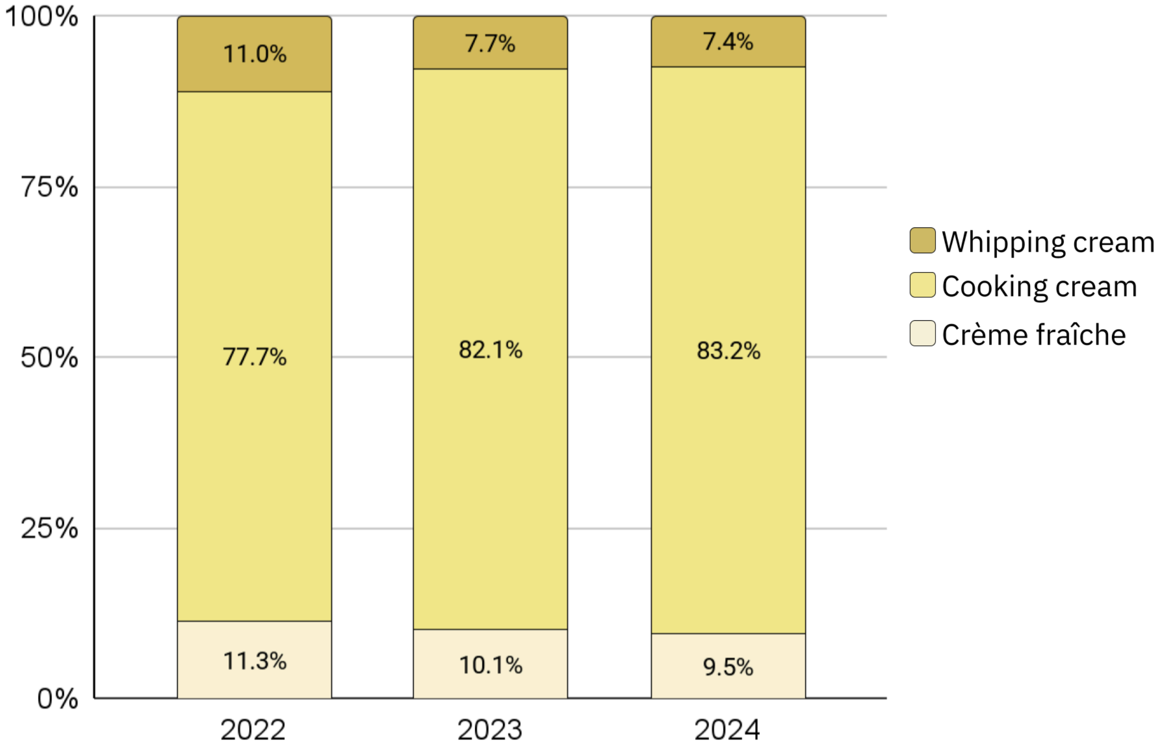


Germany plant-based cream sales by ingredient base, 2022-2024
(% of sales volume)



Most plant-based cream products sold in Germany are classed as cooking cream, at 83% of sales volume in 2024. Crème fraîche has grown slightly in sales volume from 2022 to 2024, despite losing market share, while sales of whipping cream have declined.

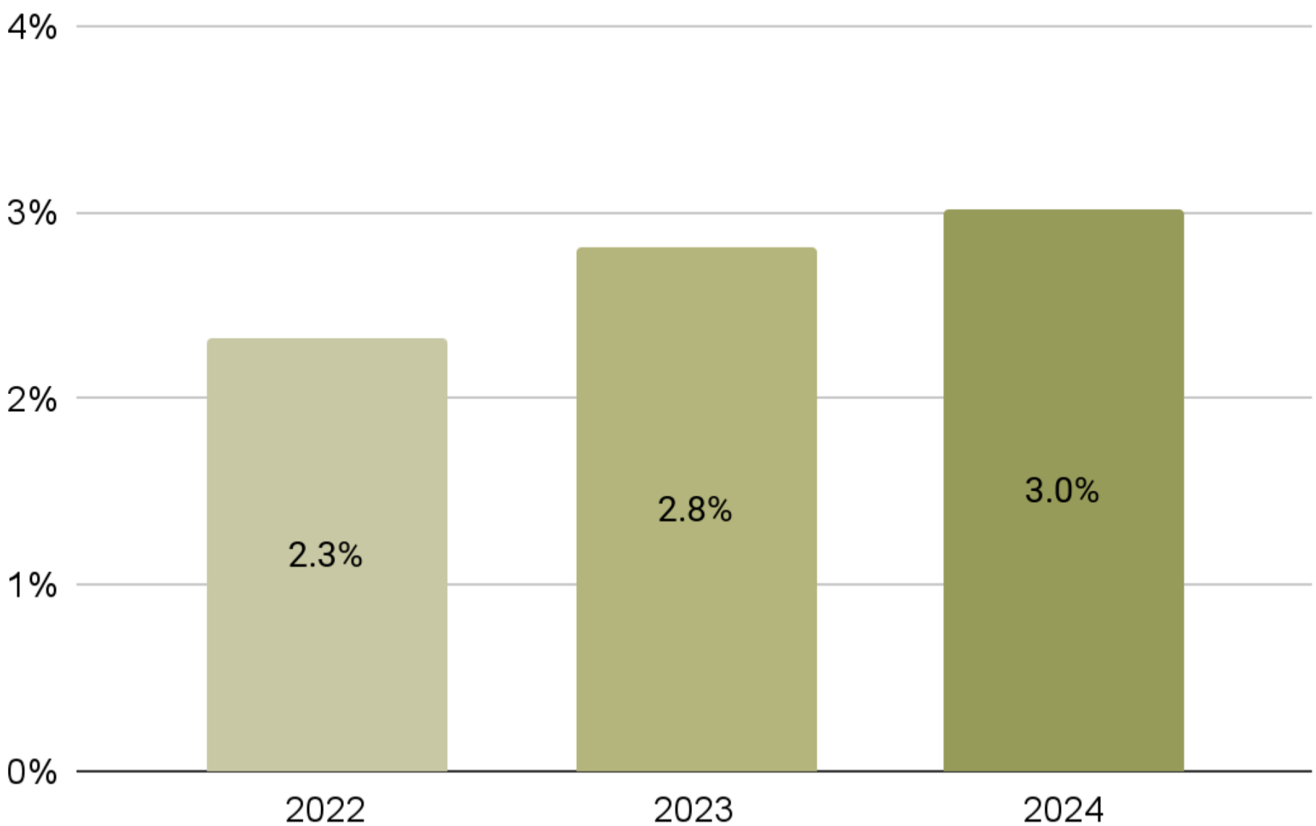
Germany plant-based cream sales by type, 2022-2024 (% of sales volume)



Market share

The market share of plant-based cream, as a percentage of the overall sales volume of plant- and animal-based cream, has risen from 2.3% in 2022 to 3.0% in 2024. This was caused by the ongoing increase in sales volume of plant-based cream, while sales of animal-based cream have not changed significantly on a percentage basis.

Plant-based cream: share of Germany's total (plant- and animal-based) cream market, 2022-2024 (% of sales volume)



Price trends relative to animal equivalent

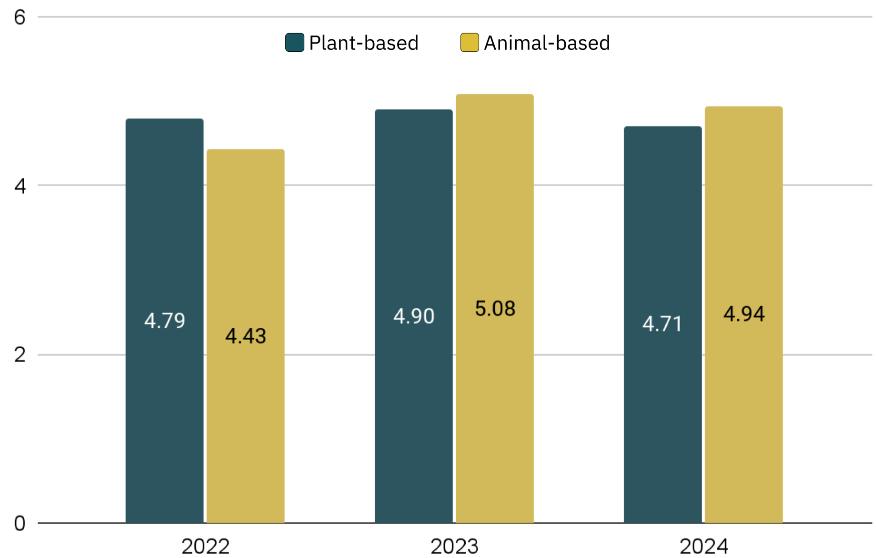
In 2024, plant-based cream was 5% cheaper per kg, on average, than animal-based cream.

This progress on price since 2022 – when plant-based cream was 8% more expensive – was driven partly by a rise in the price of animal-based cream between 2022 and 2024, and partly by a fall in average plant-based prices between 2023 and 2024.

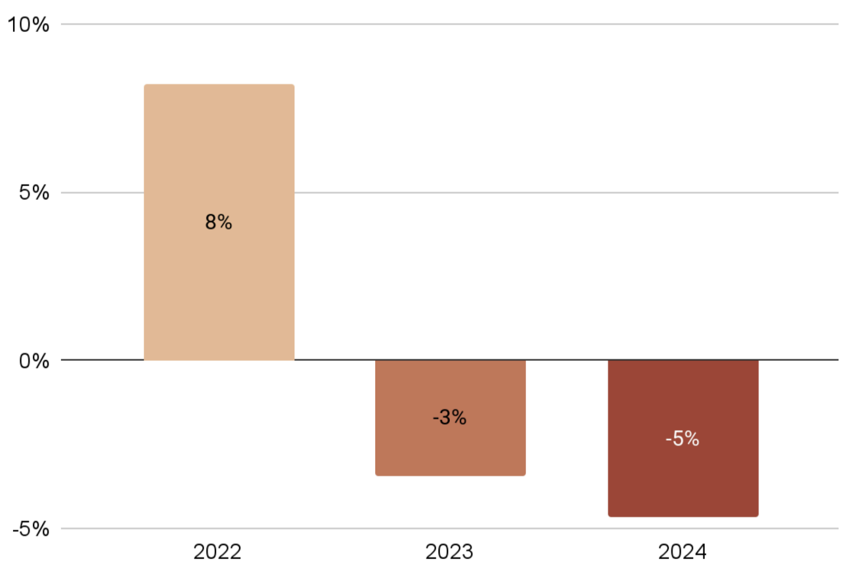
When looking only at branded products, plant-based cream was 2% more expensive per kg than the animal-based equivalent in 2024.

Private-label plant-based cream was 17% cheaper per kg than animal-based cream in 2024.

Average price per kg for plant-based and animal-based cream in Germany, 2022-2024 (€/kg)



Price difference for plant-based cream compared to animal-based cream in Germany, 2022-2024 (% difference based on €/kg)



Closing remarks

Germany's plant-based market is growing, driven largely by sales of relatively cost-competitive private-label products. This shows the importance of affordability in enabling further growth in a relatively mature plant-based market, particularly following a period of high inflation across the wider food sector.

However, there is a balance to be struck between price and quality: in order to continue reaching new consumers who are looking for plant-based options, the industry must continue to invest in improving factors such as taste, texture and convenience.

Helen Breewood,
Senior Market and Consumer Insights Manager at the Good Food Institute Europe

The plant-based sector in Germany remains a growth market. New products with improved taste profiles are contributing to this, as are supportive initiatives by German retailers.

However, the varying developments in the individual categories also show that falling prices are not the only criterion for increasing sales – further progress in terms of consumer expectations regarding taste, texture and nutritional value is essential for sustainable growth in the sector. The private sector has a particular role to play here, but policymakers should also support this development through public investments in research and development.

Ivo Rzegotta,
Senior Public Affairs Manager, Germany at the Good Food Institute Europe

About the Good Food Institute 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.

By advancing plant-based foods, cultivating meat from cells and producing ingredients through fermentation, we can boost food security, meet our climate targets and support nature-friendly farming. GFI Europe is powered by philanthropy.

Contact

Helen Breewood
Senior Market and Consumer Insights Manager, GFI Europe
europe@gfi.org

Ivo Rzegotta
Senior Public Affairs Manager, Germany, GFI Europe
deutschland@gfi.org