June 2026

2023 - 2025

Germany plant-based meat retail market insights

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

Photo: Project EADEN

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 2023 and 2025, 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 €1.71 billion** in 2025.	The combined sales **volume** of six plant-based categories in Germany **grew by 6.2%** in 2025.	**31%** of German households bought plant-based **meat** at least once in 2025.	**38%** of German households bought plant-based **milk and drinks** at least once in 2025.

The German plant-based market, the largest in Europe, continued to grow in 2025, driven partly by the ongoing strong performance of cheaper private-label products, and partly by a recovery in sales of branded products. Total sales across six plant-based categories were worth €1.71 billion in 2025: 3.1% higher than in 2024, and 5.0% higher than in 2023.

Branded plant-based sales volume rose **0.2% in 2024** and **4.5% in 2025**.	**Private-label** plant-based sales volume rose **14.2% in 2024** and **7.6% in 2025**.

The clearest success story is plant-based milk and drinks – already the second-largest category in Germany by value, this category grew in both the branded and private-label segments. Private-label plant-based milk and drinks are now cheaper per litre than private-label animal-based milk, with oat and soy-based products offering particularly low prices in comparison to animal-based milk.

Plant-based milk and drinks in 2025			
€632 million annual sales value	**9.2%** of overall plant- and animal-based milk sales volume	**7.7% year-on-year growth** in sales volume	**10% more expensive per litre** than animal-based milk

However, 2025 was a more challenging year for some other categories.

Plant-based meat was the largest plant-based category in 2025, at €751 million. Sales value remained level in 2025, but sales volume fell 1.7%.

The small plant-based seafood category (€14.1 million in 2025) saw sales decline significantly, by 29% in volume terms, in 2025.

Plant-based cheese sales were worth €85 million in 2025, down by 7.4%, though sales volume remained steady. Plant-based cheese has made significant progress on affordability, falling from 44% more expensive per kg than animal-based cheese in 2023 to 16% more expensive in 2025.

Plant-based cream, worth €53 million in 2025, fell by 6.7% in sales volume despite being 6% cheaper per kg than animal-based cream.

Plant-based yoghurt sales, in contrast, had positive trends in 2025. Sales were worth €174 million in 2025 and sales volume grew by 7.8%.

This year's report features a new chapter on **tofu, tempeh and seitan**. These products are not classed as plant-based meat or counted towards the plant-based total because they are not marketed explicitly as analogues of specific animal-based products. Their rapid growth between 2023 and 2025 (up 53% in sales volume) makes them an interesting comparison to plant-based meat, which does aim to replicate meat's taste and texture. However, it is worth noting that the sales volume of plant-based meat was 3.7 times higher than tofu, tempeh and seitan combined in 2025.

Overview of plant-based food sales by category in Germany, 2023-2025

	Sales value			Unit sales			Sales volume		
	2025, € million	2024-25 change	2023-25 change	2025, million units	2024-25 change	2023-25 change	2025, million kg	2024-25 change	2023-25 change
Meat	750.8	0.2%	4.6%	347.2	-0.5%	6.7%	52.3	-1.7%	4.9%
Seafood	14.1	-22.0%	-41.4%	5.3	-19.2%	-41.1%	1.0	-29.4%	-47.1%
Milk and drinks	632.4	8.1%	12.1%	417.8	7.3%	14.3%	416.2	7.7%	16.2%
Cheese	85.5	-7.4%	-21.8%	48.4	-2.9%	-3.2%	7.5	-0.5%	-2.3%
Yoghurt	173.9	9.8%	8.3%	113.7	6.5%	15.2%	47.0	7.8%	15.5%
Cream	53.0	-4.8%	0.0%	51.4	-5.9%	4.4%	11.0	-6.7%	1.8%
Total	**1709.7**	**3.1%**	**5.0%**	**983.9**	**2.9%**	**9.6%**	**534.9**	**6.2%**	**14.1%**

Data on additional products that are not counted towards the plant-based total

Tofu, tempeh and seitan	95.1	28.9%	55.1%	41.5	28.1%	49.4%	14.0	29.7%	53.2%

Plant-based food sales value by category in Germany, 2023-2025 (€ millions)

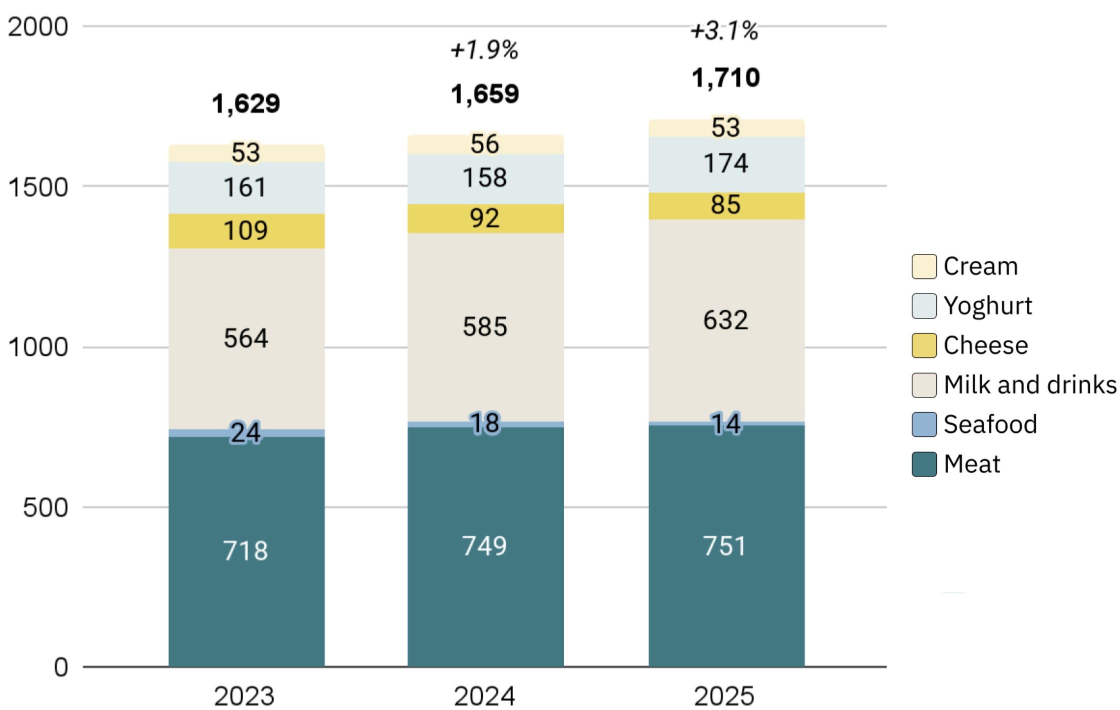


Table of contents

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. The Circana data for Germany covers supermarkets over 200m^2 in area, hypermarkets like 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 2023, 2024 and 2025 cover 52-week periods beginning with the first calendar week of each year.

The report 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 who scan items that they bring home, to offer a complementary viewpoint to the Circana retail sales data.

Note that due to ongoing refinement and backdating of the datasets by both Circana and NIQ, the figures reported here are not directly comparable to those reported in the previous edition of this report.

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: foods 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 do not replicate 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 replicate 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

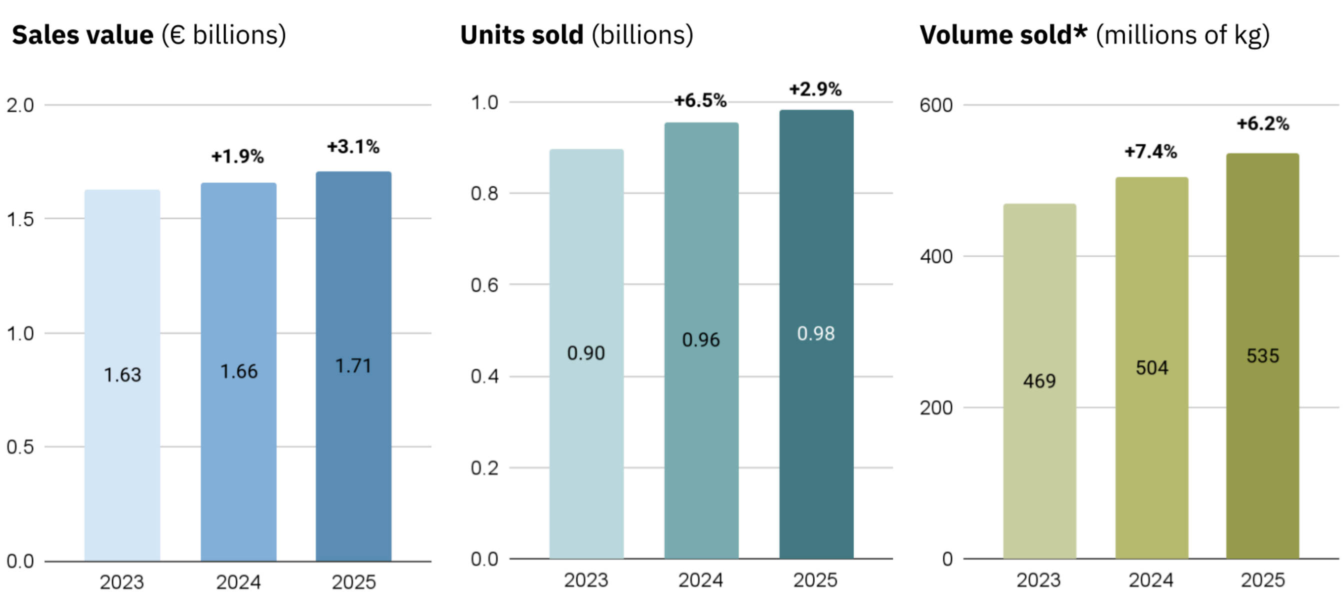
Total German plant-based market

In 2025, Germany's plant-based market, the largest in Europe, saw continued moderate growth overall, with steady or growing sales value in the three largest categories and falling sales value in the three smallest categories.

Annual sales value across six plant-based categories grew by 3.1% in 2025 to €1.71 billion, which was 5.0% higher than the total in 2023. Unit sales rose to 984 million in 2025, up by 2.9% from 2024 and up by 9.6% from 2023. Sales volume reached 535 million kg in 2025, an increase of 6.2% from 2024 and 14.1% from 2023.

Sales volume rose more than sales value, partly because of an increase in sales of lower-cost private-label products and partly because of growth in plant-based milk and drinks, which have higher volume per unit due to their high water content.

Plant-based food sales across six categories in Germany, 2023-2025

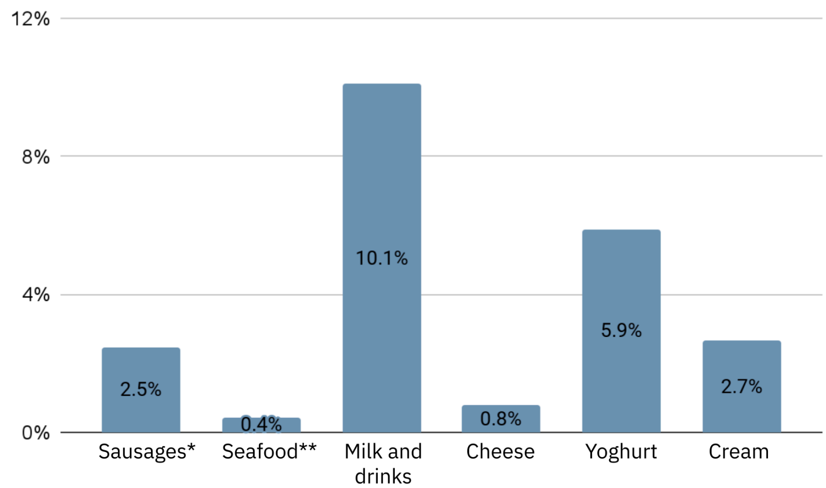


**Sales volume was reported by Circana in litres for milk and drinks, in mixed kg and litres for cream and in kg for all other categories. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.*

Categories

Plant-based milk and drinks was the most successful category in 2025, making up 10.1% of overall (plant- and animal-based) sales value and 9.2% of overall sales volume. This success is also reinforced by household panel data from NIQ, which shows that one in eight households bought plant-based milk at least once a month on average in 2025. See the chapter "Plant-based milk and drinks" for more details.

Plant-based food: share of Germany's total pre-packaged (plant- and animal-based) sales for each category, 2025 (% of sales value)

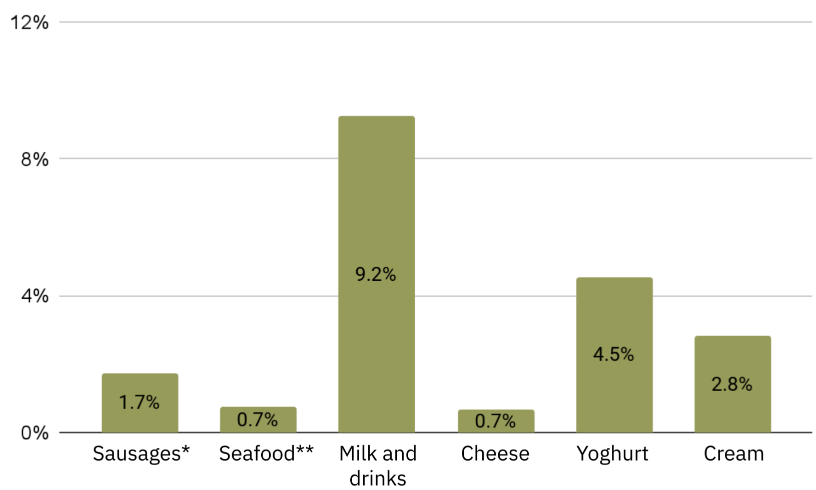


*Full data for animal-based meat was not available. **The market share of seafood has been calculated based on frozen plant- and animal-products only, since no chilled animal-based seafood data was available.

Plant-based cheese and frozen seafood had tiny shares of the overall market in 2025, at less than 1% each.

Meanwhile, plant-based cream, yoghurt and sausages (no market share could be calculated for meat as a whole due to data limitations) achieved intermediate market shares.

Plant-based food: share of Germany's total pre-packaged (plant- and animal-based) sales for each category, 2025 (% of sales volume)



*Full data for animal-based meat was not available. **The market share of seafood has been calculated based on frozen plant- and animal-products only, since no chilled animal-based seafood data was available.

For most categories, their market share by value is greater than their market share by volume. This is because plant-based options currently tend to be more expensive per kg than their animal-based counterparts. The exceptions are plant-based cream and plant-based frozen seafood.

The largest category by sales value, plant-based meat, saw steady sales during 2025. However, the strongest growth in sales value in 2025 was seen in plant-based yoghurt (+9.8%) and plant-based milk and drinks (+8.1%).

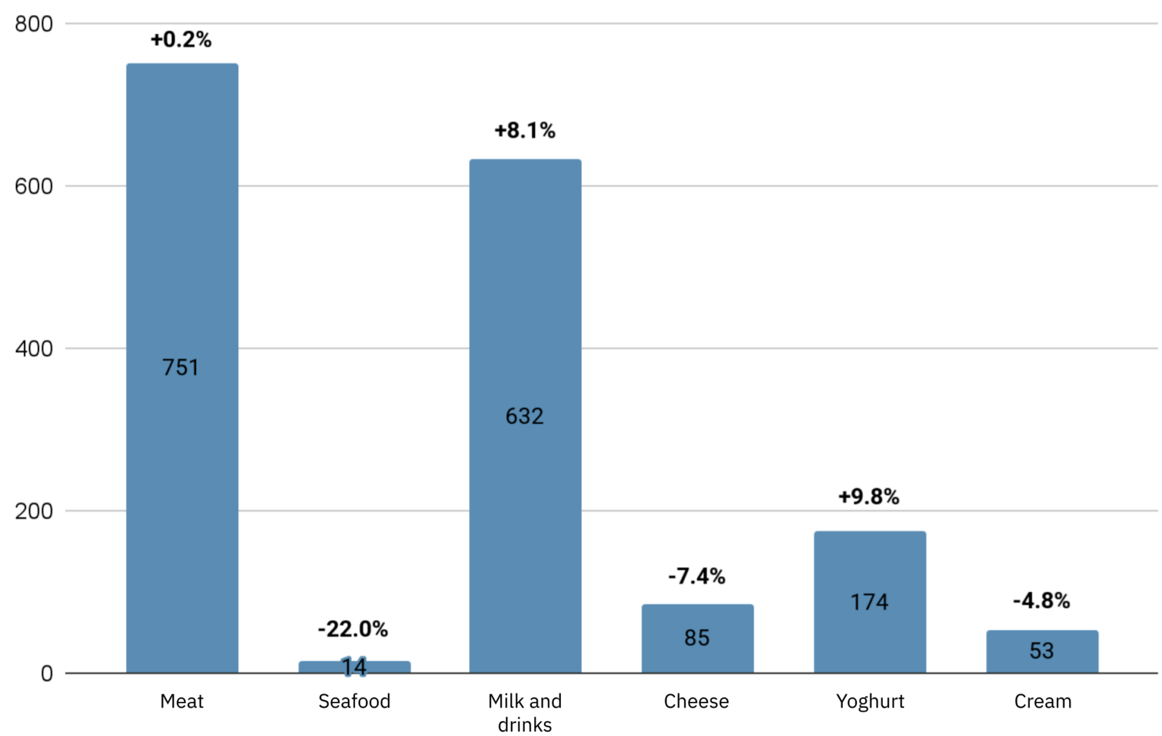
The three categories with falling sales value during 2025 – plant-based seafood, cheese and cream – were also the three smallest categories.

The significant drop in plant-based seafood sales value may have been driven partly by product withdrawals – see the chapter “Plant-based seafood” for more context.

The fall in plant-based cheese sales value was not driven by falling demand, as sales volume remained steady in 2025. Rather, it was mainly driven by reductions in average price per kg caused by the rise of significantly cheaper private-label products.

In contrast, the fall in plant-based cream sales value was caused by a 6.7% reduction in sales volume.

Plant-based food sales value and growth rates* by category in Germany, 2025
(€ millions)



** The percentages above each column denote the change in sales value of that category between 2024 and 2025.*

Branded versus private label

Private-label products – ie, supermarket or discount store own-label products – saw strong growth between 2023 and 2025, most likely because they tend to be cheaper per kg than branded products.

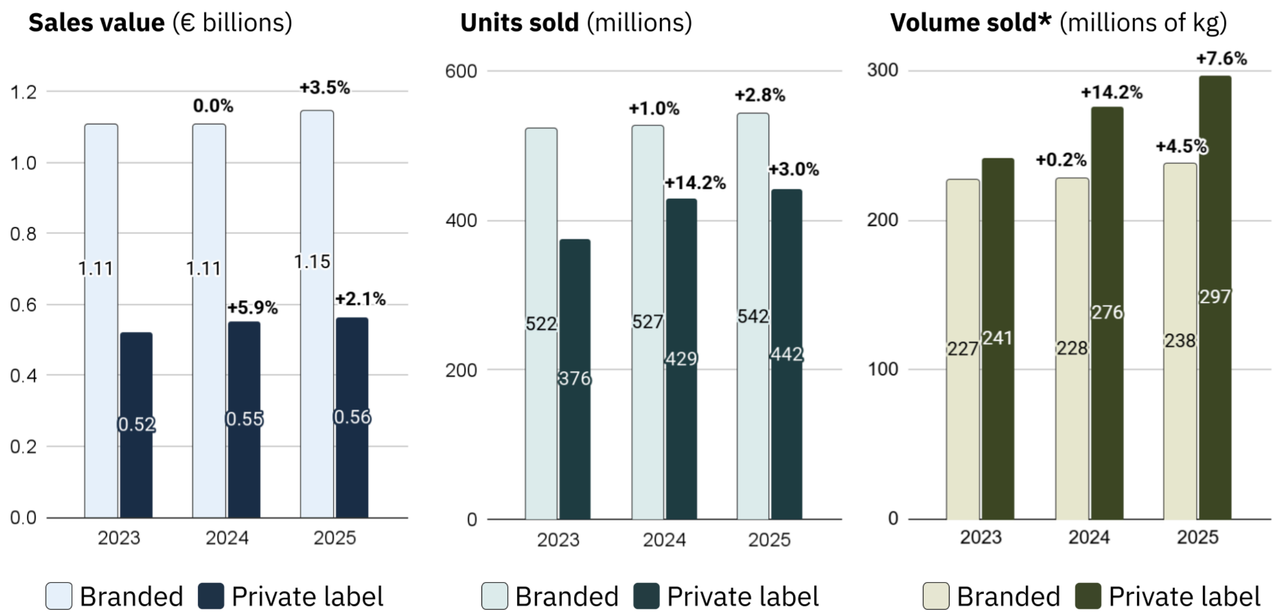
However, sales of branded products picked up again in 2025, after remaining steady in 2024. This could reflect easing pressures on consumer budgets, as inflation in Germany's wider food sector fell significantly following a historical peak of 21.2% in early 2023.

There is a balance to be struck between affordability and quality. Private-label performance varied between categories, with sales volume falling 7% in 2025 for plant-based meat but rising 9% for plant-based milk. This suggests that factors other than price, such as taste, texture and ease of cooking, also influence consumer choices.

Plant-based sales and growth rates across six product categories in Germany, branded versus private label, 2023-2025

	Sales value			Unit sales			Sales volume		
	2025, € billion	2024-25 change	2023-25 change	2025, million units	2024-25 change	2023-25 change	2025, million kg	2024-25 change	2023-25 change
Branded	1.15	3.5%	3.5%	542.4	2.8%	3.8%	238.2	4.5%	4.7%
Private label	0.56	2.1%	8.1%	441.5	3.0%	17.6%	296.7	7.6%	22.9%

Branded vs private label plant-based food sales across six categories in Germany, 2023-2025

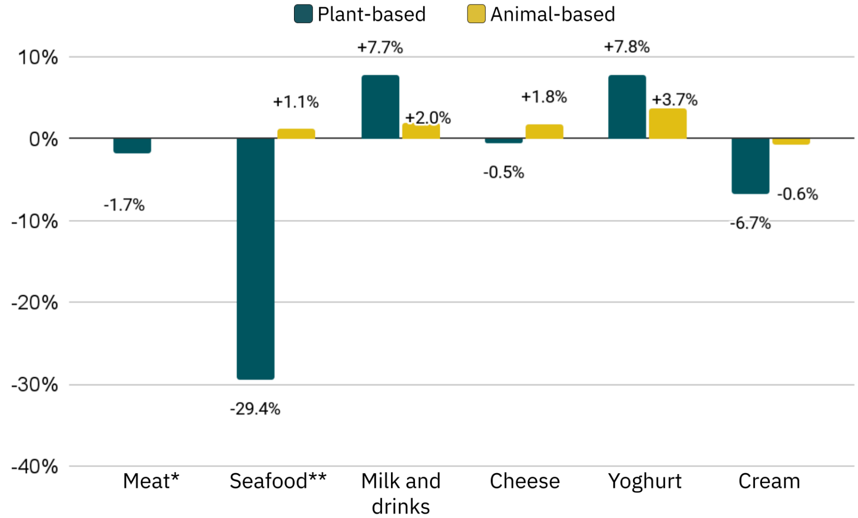


**Sales volume was reported by Circana in litres for milk and drinks, in mixed kg and litres for cream and in kg for all other categories. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.*

Comparison to animal-based foods

Most animal-based categories for which data is available saw either steady sales volume or slight growth in 2025. Changes in plant-based sales volume were more varied, with plant-based seafood and cream decreasing, plant-based meat and cheese seeing falls of less than 2%, and plant-based milk and drinks and yoghurt growing.

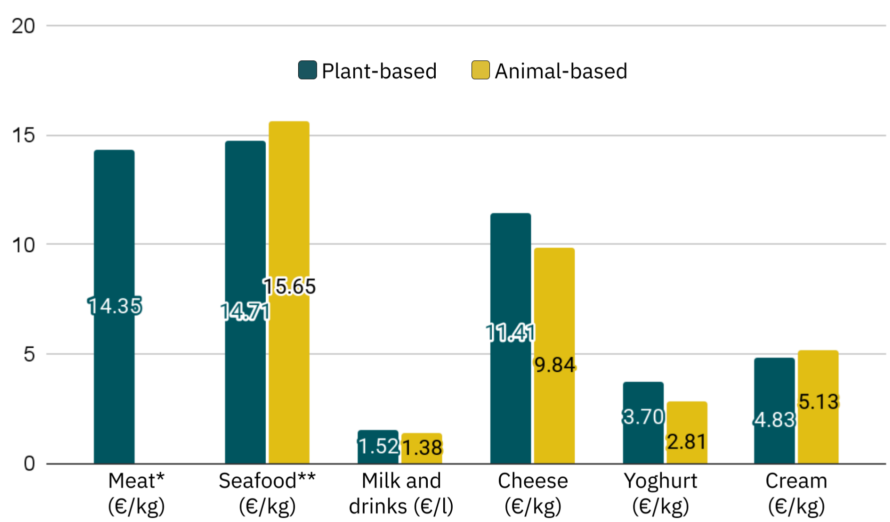
Change in the sales volume of pre-packaged plant- and animal-based foods in Germany, 2024-2025 (%)



**No sales volume data was available for animal-based meat as a whole category. **In this graph, plant-based seafood covers both chilled and frozen products, while animal-based seafood covers frozen products only.*

Note that since the animal-based categories have much larger market sizes, even small percentage changes can translate into much larger absolute changes in sales volume than those seen in the plant-based categories.

Average price per kg or litre of plant- and animal-based foods in Germany, 2025 (€ per kg or l)



**No sales volume data was available for animal-based meat as a whole category. **In this graph, plant-based seafood covers both chilled and frozen products, while animal-based seafood covers frozen products only.*

In general, plant-based foods are more expensive per kg than their animal-based equivalents. The exceptions are plant-based cream and plant-based seafood. Note, however, that the data available covers only frozen animal-based seafood (not chilled), and the animal-based seafood category is diverse and contains many premium products.

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 provide any information on how frequently consumers buy 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 25,000 households. The data is nationally representative of households in Germany.

The proportion of households purchasing plant-based meat at least once per year fell slightly in 2025 to 31.2%. The proportion of frequent purchasers (those buying an average of once per month or more often) also fell slightly, to 9.4% in 2025.

For plant-based milk, the proportion of households buying at least once per year dipped slightly in 2024 before returning to 38.3% in 2025. Frequent buyers rose slightly from 12.0% in 2023 to 12.5% in 2025.

Just under one-third of plant-based meat sales and one-third of plant-based milk sales were from discounter stores (such as Aldi and Lidl) in 2025.

Household purchase patterns for plant-based foods in Germany, 2023-2025

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		
	2023	2024	2025	2023	2024	2025	2023	2024	2025	2023	2024	2025
Plant-based meat	33.1%	33.1%	31.2%	15.5%	15.2%	14.4%	10.3%	9.9%	9.4%	31.0%	30.9%	30.5%
Plant-based milk	38.2%	37.1%	38.3%	18.8%	18.9%	19.5%	12.0%	12.3%	12.5%	31.8%	33.6%	33.2%

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 25,000 households. Data covers "plant-based meat substitutes" and "plant-based milk". Note that the proportion of sales from discounters reported for 2023 and 2024 here is lower than that of the previous edition of this report. This is due to the expansion of the household panel sample size and improved calibration by NIQ, resulting in more accurate data.

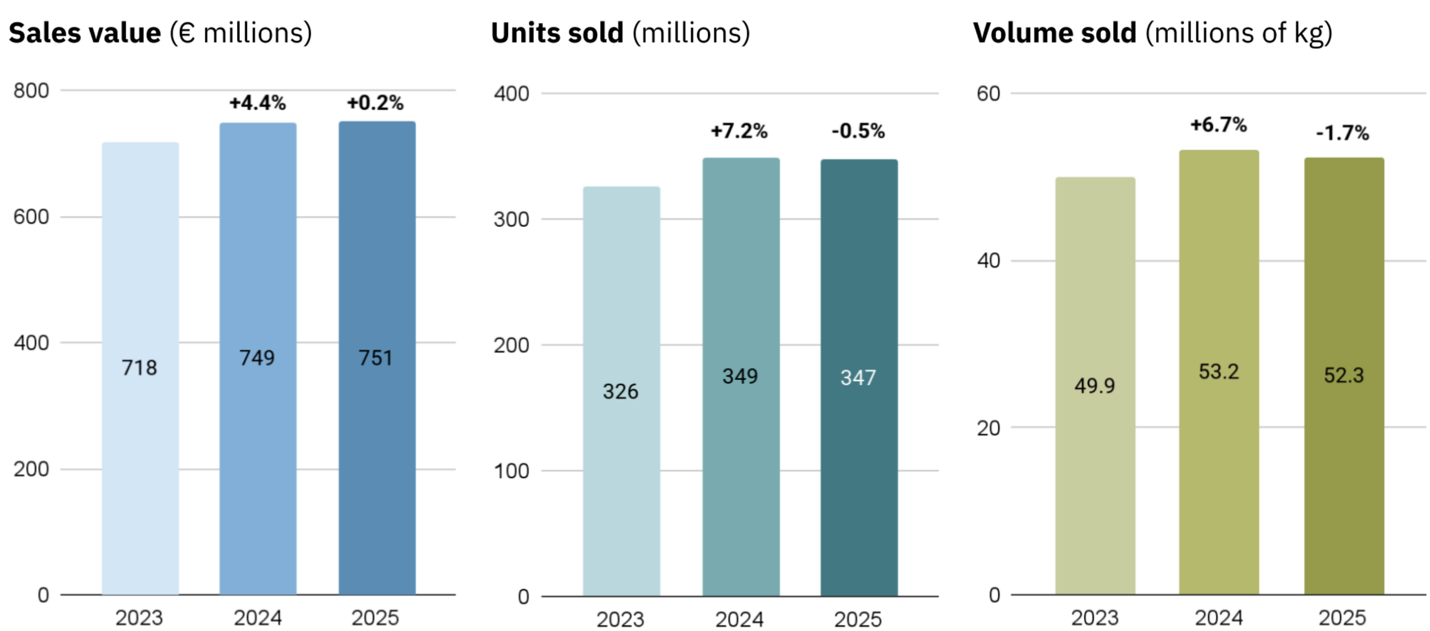
Plant-based meat

Total market

The plant-based meat[1] market in Germany levelled off in 2025, following moderate growth in 2024.

In 2025, annual sales value remained steady at €751 million, up 4.6% from 2023. Unit sales also remained roughly steady at 347 million in 2025, up 6.7% from 2023. Sales volume fell 1.7% to 52.3 million kg, which was nevertheless 4.9% higher than in 2023.

Plant-based meat sales in Germany, 2023-2025

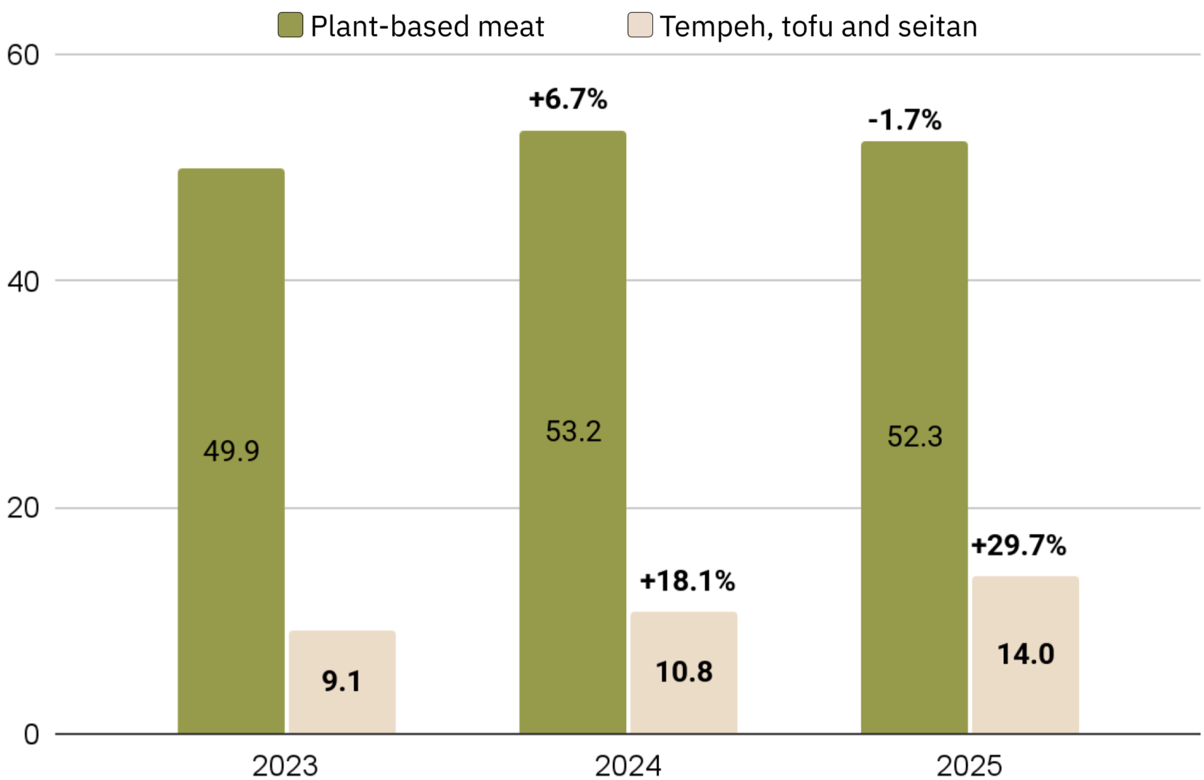


[1] Plant-based options that use formats similar to those of conventional meat products, such as burgers, sausages and meatballs. The data does not permit a full isolation of only the products that are intended to replicate the taste and texture of animal-based meat. The plant-based meat category in 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 in the chapter "Spotlight on tofu, tempeh and seitan".

By comparison, combined sales of tofu, tempeh and seitan saw double-digit growth in both 2024 and 2025 (see the chapter “Spotlight on tofu, tempeh and seitan” for further details). It is possible that this rapid growth was driven by a significant price advantage: tofu, tempeh and seitan had an average cost of €6.80/kg in 2025, compared to €14.35/kg for plant-based meat.

Plant-based meat nevertheless had a sales volume 3.7 times larger than tofu, tempeh and seitan combined in 2025, suggesting that products that aim to replicate the taste, texture and format of meat remain more popular among German consumers, despite their higher cost. GFI Europe research conducted with HarrisX and Plant Futures in 2024 found that only 50% of German consumers felt confident about cooking a meal with plant-based foods, compared with 75% for animal-based foods, showing the importance of familiar and convenient product formats.

Plant-based meat compared to tofu, tempeh and seitan in Germany, 2023-2025 (sales volume, million kg)



Branded versus private label

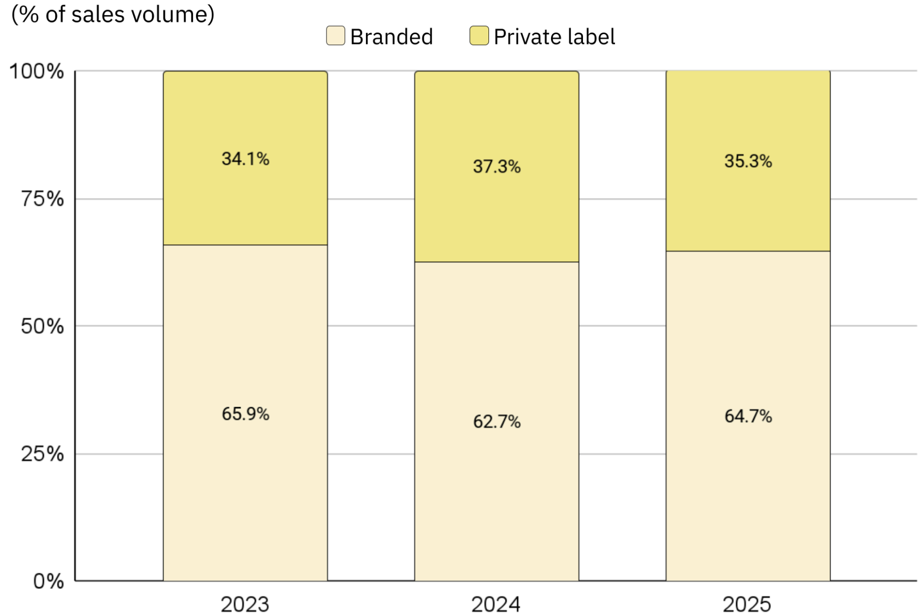
The market share of private-label plant-based meat products (ie, supermarket and discount store own-brand products) fell slightly to 35.3% in 2025.

This was driven by a 7% fall in absolute sales volume for private-label, while branded sales remained roughly steady.

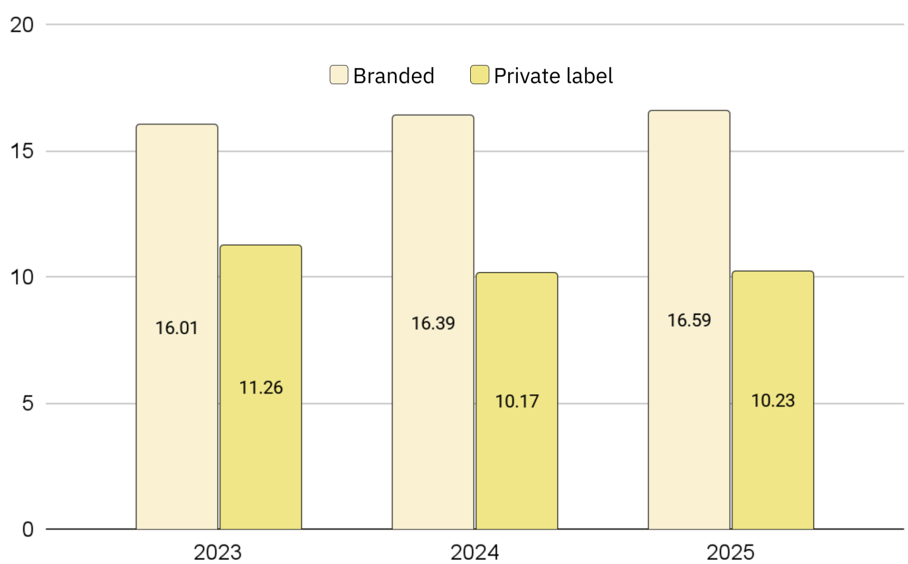
Private-label products have a price advantage over branded products; they were 38% cheaper per kg in 2025.

Even with this clear price advantage, the fact that private-label sales make up only around one-third of the market suggests that they might not yet fully meet consumer expectations around taste and performance.

Germany plant-based meat sales by branded or private label, 2023-2025
(% of sales volume)



Average price per kg of plant-based meat in Germany, by branded or private label, 2023-2025 (€/kg)

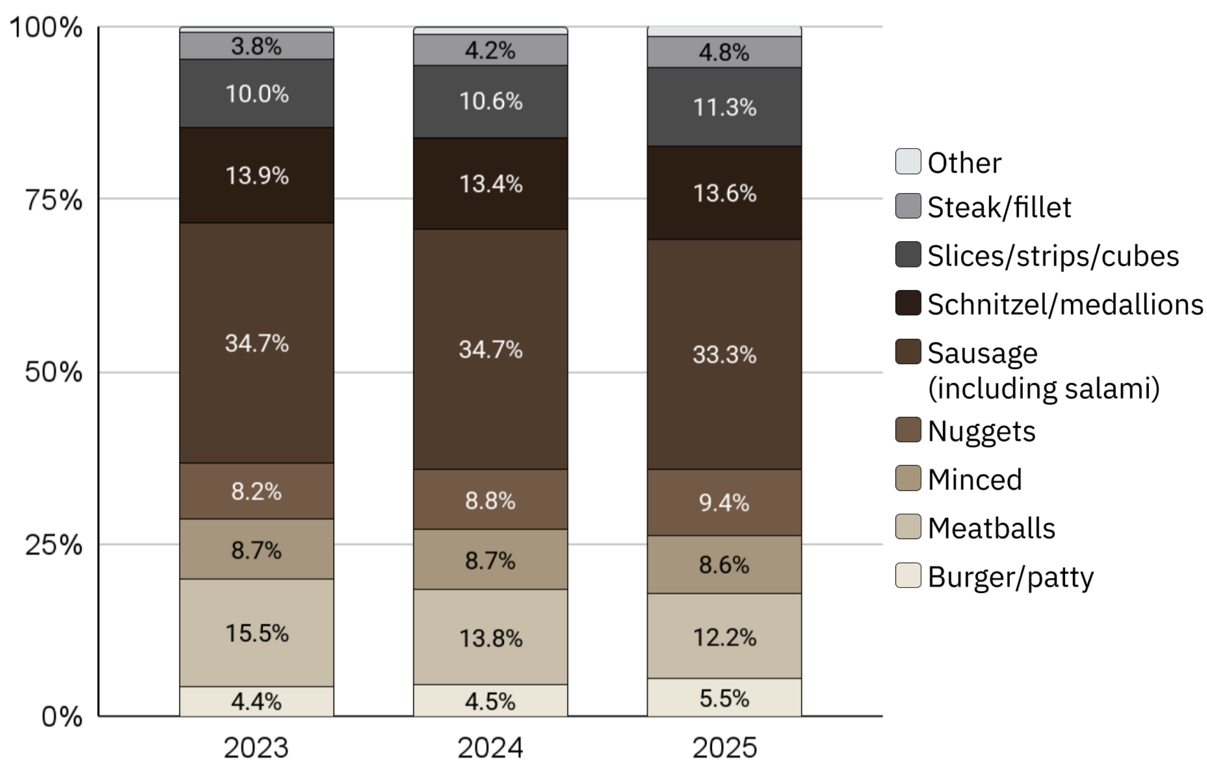


Product format breakdown

The vast majority of products for which data is available were chilled (90% of sales volume in 2025), with only 7% frozen and 3% ambient. There was no shift in these proportions from 2023 to 2025.

A wide variety of formats is available, reflecting that plant-based meat is a reasonably mature market in Germany compared to some other European markets. Sausages (including salami) led the market in 2025, at one-third of sales volume. There was absolute growth in sales volume for burgers/patties (+20%), nuggets (+5%), slices/strips/cubes (+5%), and steak/fillet (+11%) in 2025.

Germany plant-based meat sales by format, 2023-2025 (% of sales volume)

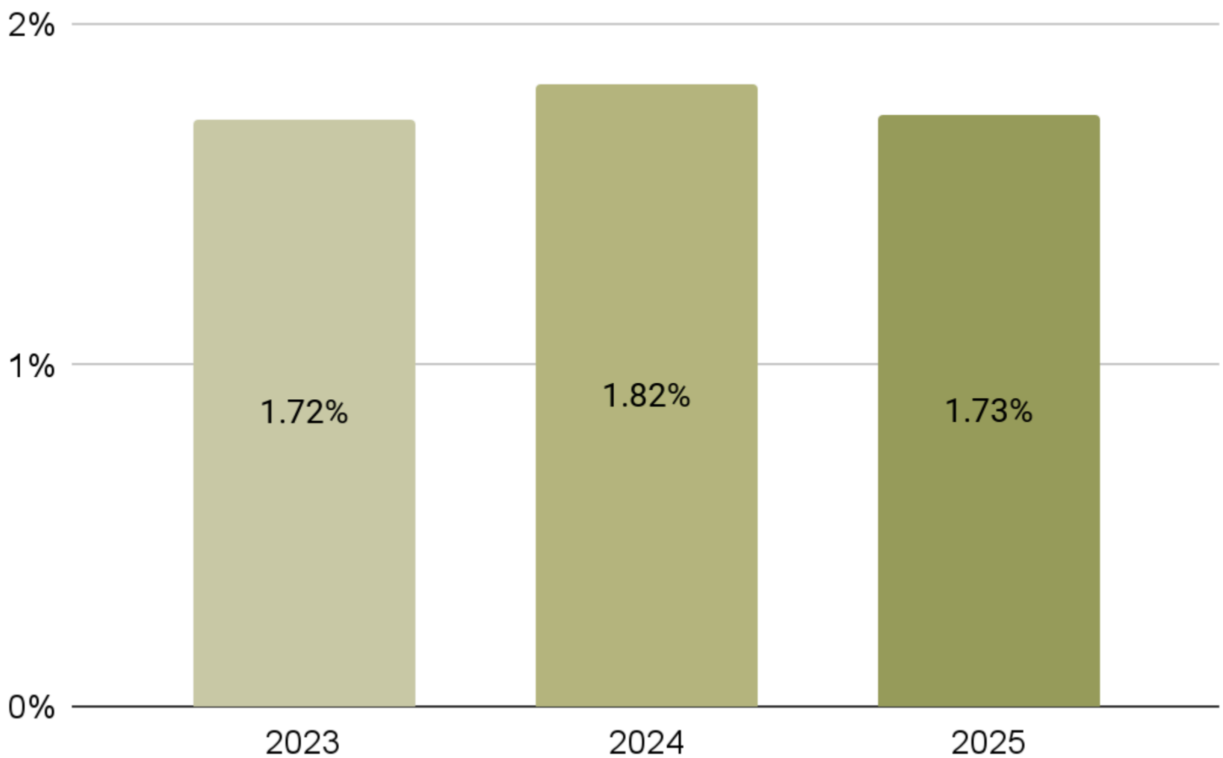


Market share

Due to changes in Circana's data coverage, it was not possible to calculate the market share of plant-based meat compared to total animal-based meat sales. However, a market share could be calculated for sausage products.[2]

Plant-based sausage products accounted for 1.73% of the total sales volume of pre-packaged sausages (both plant- and animal-based) in 2025 – a slight fall from 2024, but slightly higher than in 2023. The changes can be mostly attributed to the rise and fall in plant-based sausage sales volume, as the sales volume of animal-based sausages remained level between 2023 and 2025.

Plant-based sausage: share of Germany's total (plant- and animal-based) pre-packaged sausage market, 2023-2025
(% of sales volume)



[2] The plant-based sausage data covers a variety of products such as *Bruehwurst* (boiled sausage), *Currywurst* (curry sausage), hot dogs, *Leberwurst* (liver sausage) and salami. The animal-based data covers both cooked and uncooked pre-packaged sausage products.

Price trends relative to animal equivalent

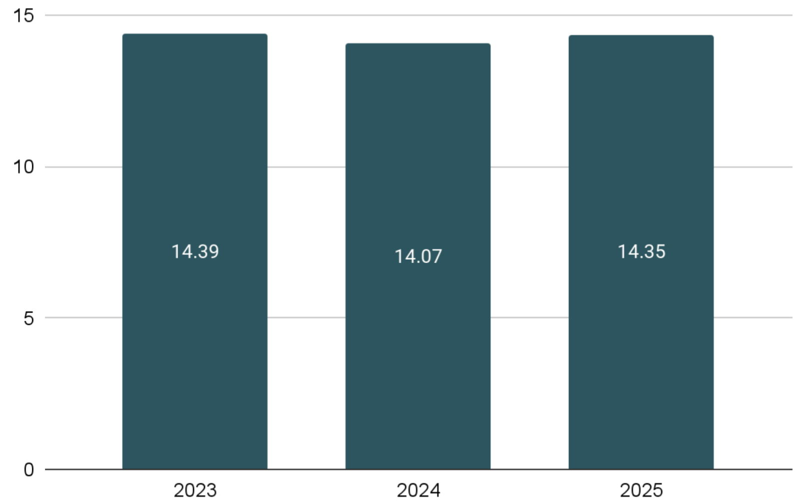
The average price of plant-based meat dipped slightly in 2024, before rising again in 2025.

It was not possible to calculate a price comparison for animal-based meat as a whole using the data from Circana.

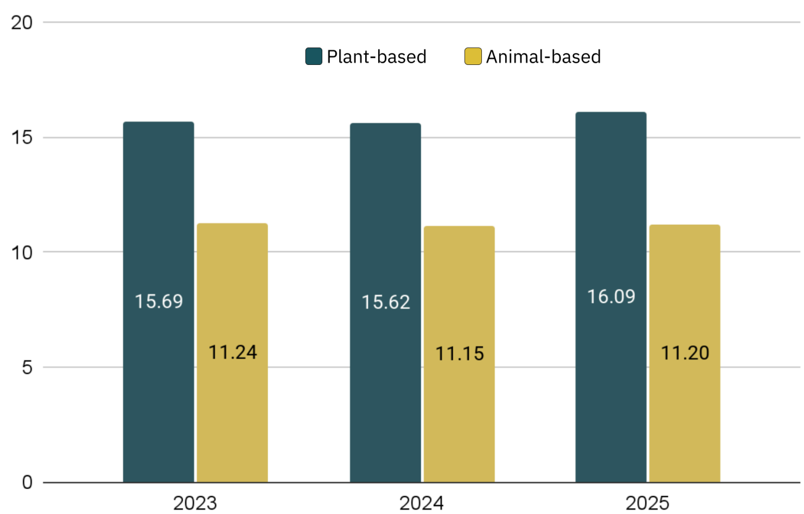
However, plant-based sausage products were an average of 44% more expensive per kg than animal-based sausage products in 2025.

This gap was higher than in 2023, driven by falling animal-based sausage prices and rising plant-based sausage prices.

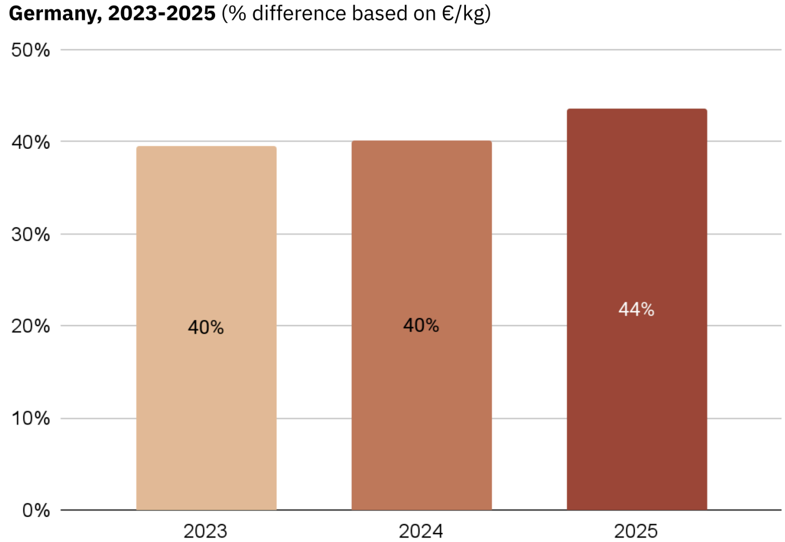
Average price per kg for plant-based meat in Germany, 2023-2025 (€/kg)



Average price per kg for plant-based and animal-based pre-packaged sausage in Germany, 2023-2025 (€/kg)



Price difference for plant-based sausage compared to animal-based sausage in Germany, 2023-2025 (% difference based on €/kg)



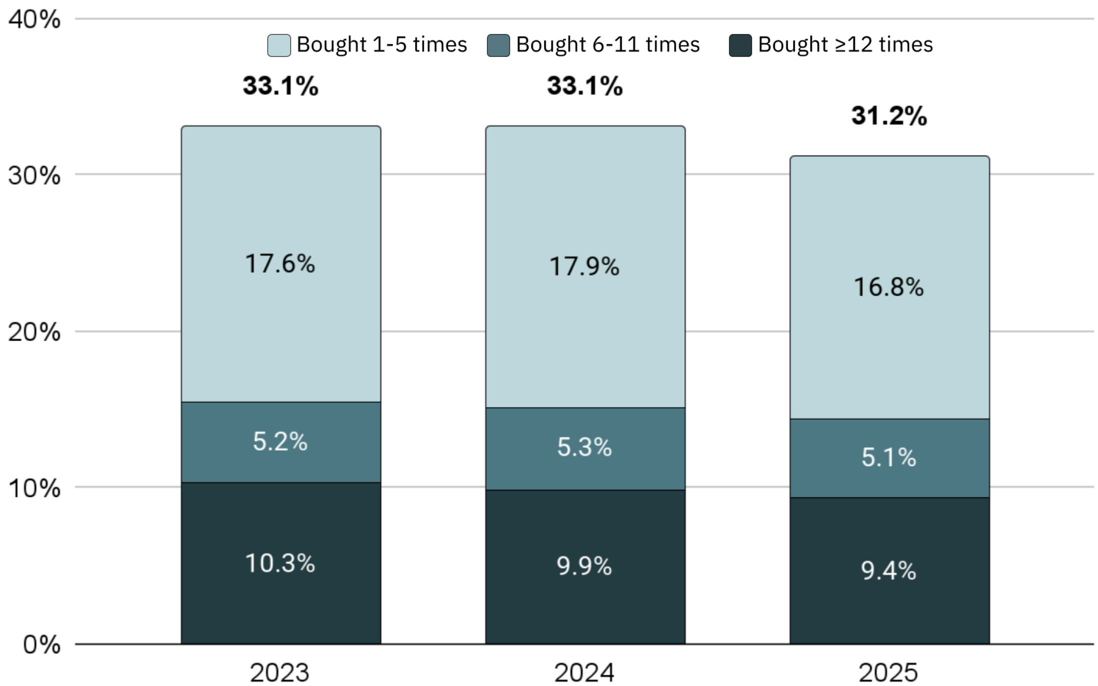
Household panel data

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 data sources (NIQ Homescan and Circana's retail sales data) are not directly comparable because 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 33.1% of German households bought plant-based meat at least once in 2023. This proportion fell to 31.2% in 2025. In 2023, 10.3% of households were frequent purchasers – buying plant-based meat once a month or more on average. This fell to 9.4% in 2025.

The falling rates of occasional and frequent purchasers in 2025 reflect the slight fall in sales volume shown by the Circana data.

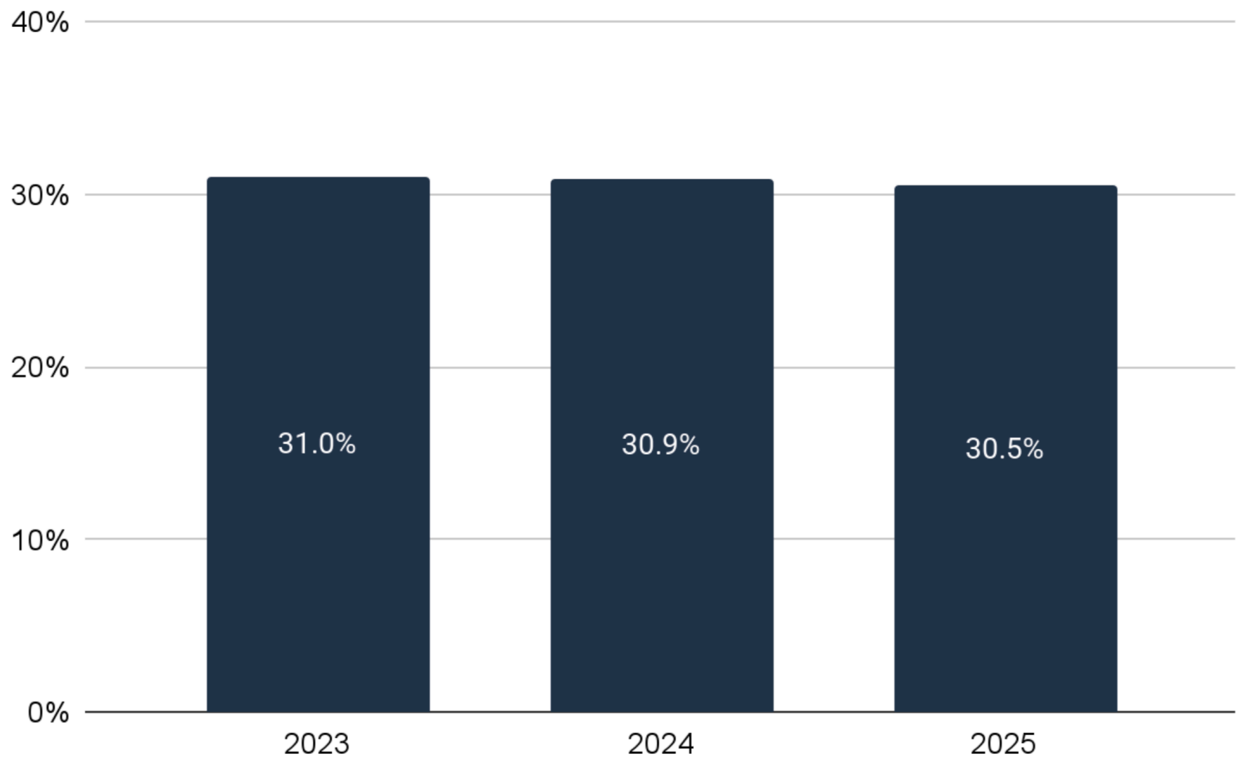
Annual household purchase patterns for plant-based meat in Germany, 2023-2025 (% of households)



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 25,000 households. Data covers "plant-based meat substitutes".

The NIQ Homescan data also shows that the proportion of plant-based meat's sales value that has come from discounter stores,[3] such as Aldi and Lidl, remained steady at around 31%.

Household purchase patterns for plant-based meat in Germany: proportion of sales value from discounter stores, 2023-2025 (%)



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 25,000 households. Data covers "plant-based meat substitutes".

[3] Note that the proportions of sales from discounters reported for 2023 and 2024 here are lower than those reported in the previous edition of this report. This is due to expansion of the household panel sample size and improved calibration by NIQ, resulting in more accurate data.

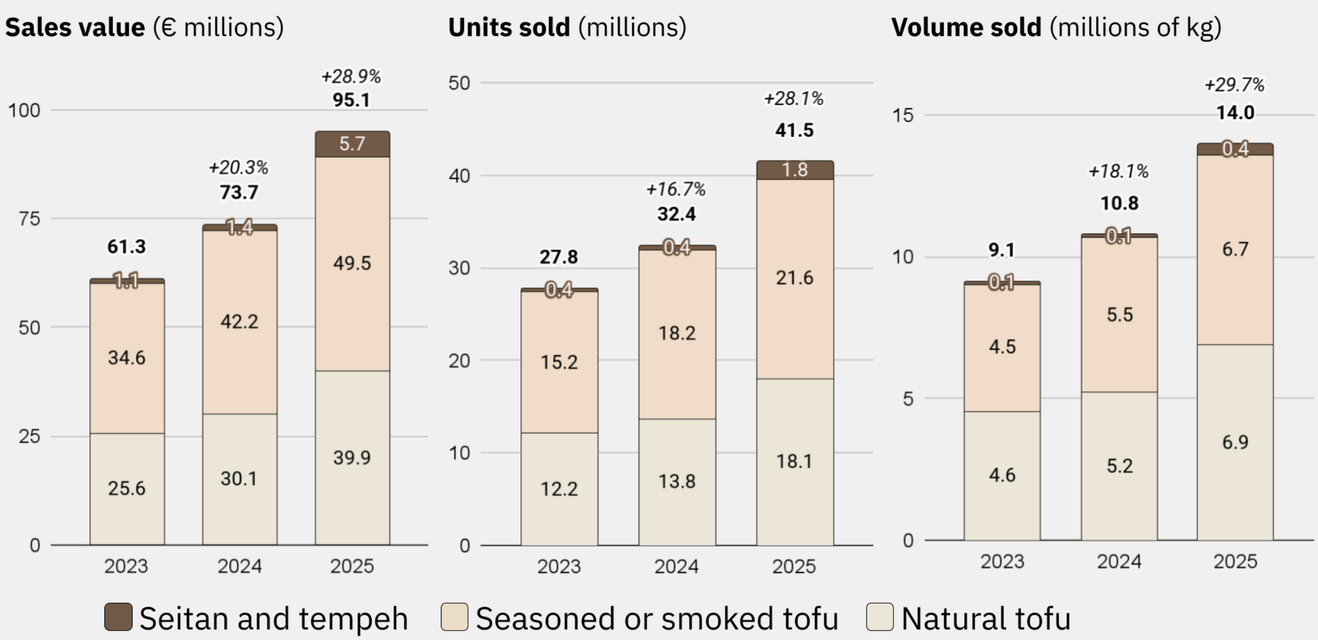
Spotlight on tofu, tempeh and seitan

Total market

Tofu, tempeh and seitan[4] are traditional foods with a long history in Asian cooking. They are not classed as plant-based meat in this report because, in the German market, these products are not typically positioned as direct substitutes that aim to replicate the taste or texture of meat, in contrast to the newer wave of innovative plant-based meat substitutes that have grown in popularity over the past decade or so. However, they provide an interesting case study to compare with sales trends of plant-based meats that do aim to replicate the taste or format of meat.

The combined annual sales value of tofu, tempeh and seitan grew by 29% in 2025, reaching €95.1 million, up by 55% since 2023. Unit sales rose 28% in 2025 to 41.5 million, up by 49% from 2023. Sales volume was 14.0 million kg in 2025, up by 30% from 2024 and up by 53% from 2023. Despite this rapid growth in recent years compared to that of plant-based meat, the sales volume of plant-based meat was 3.7 times higher than tofu, tempeh and seitan combined in 2025.

Tofu, seitan and tempeh sales in Germany, 2023-2025



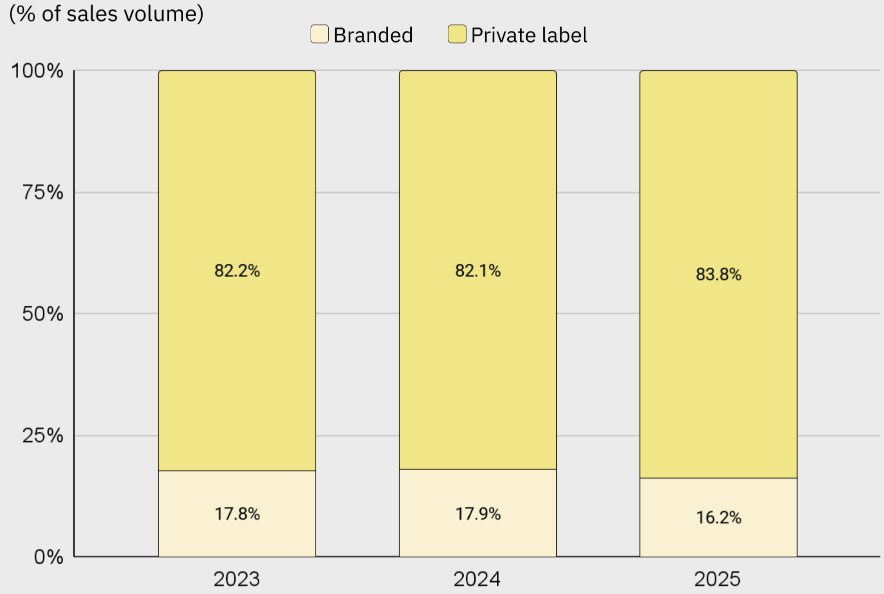
[4] Tofu is a product originating in China over 2,000 years ago, made from soy milk curds. Tempeh is a traditional Indonesian product made from fermented soybeans. Seitan is made from wheat gluten and historically used in various Asian cuisines; the data here includes dry powders for making seitan products at home as well as seitan blocks and pieces.

Branded versus private label

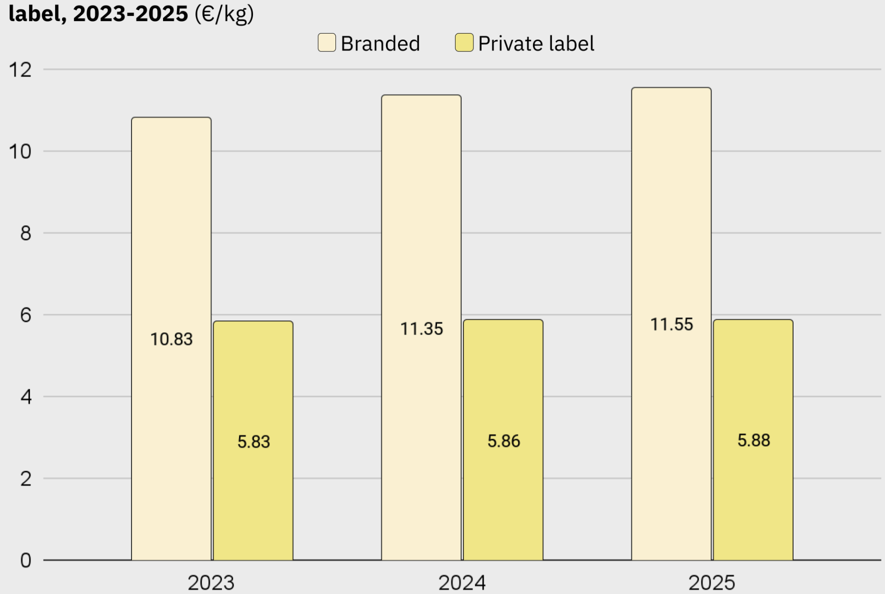
Over four-fifths of the combined sales volume of tofu, tempeh and seitan was private label, at 83.8% in 2025.

These private-label products had a significant price advantage over branded options, at 49% cheaper per kg in 2025.

Germany tofu, tempeh and seitan sales by branded or private label, 2023-2025 (% of sales volume)



Average price per kg of tofu, tempeh and seitan in Germany, by branded or private label, 2023-2025 (€/kg)



Price trends

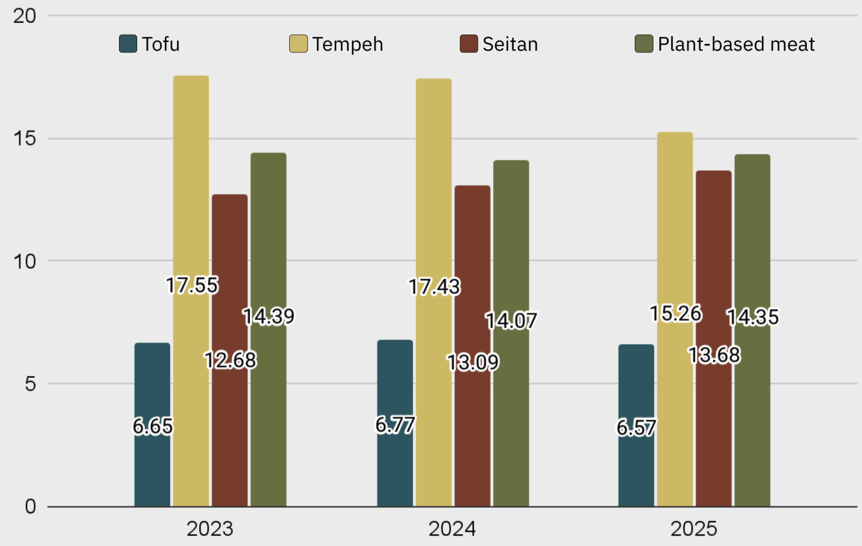
Tofu was by far the cheapest product in this category throughout 2023 to 2025, at just €6.57/kg in 2025.

The cheapest segment within tofu is plain private-label tofu, which was €5.36/kg in 2025.

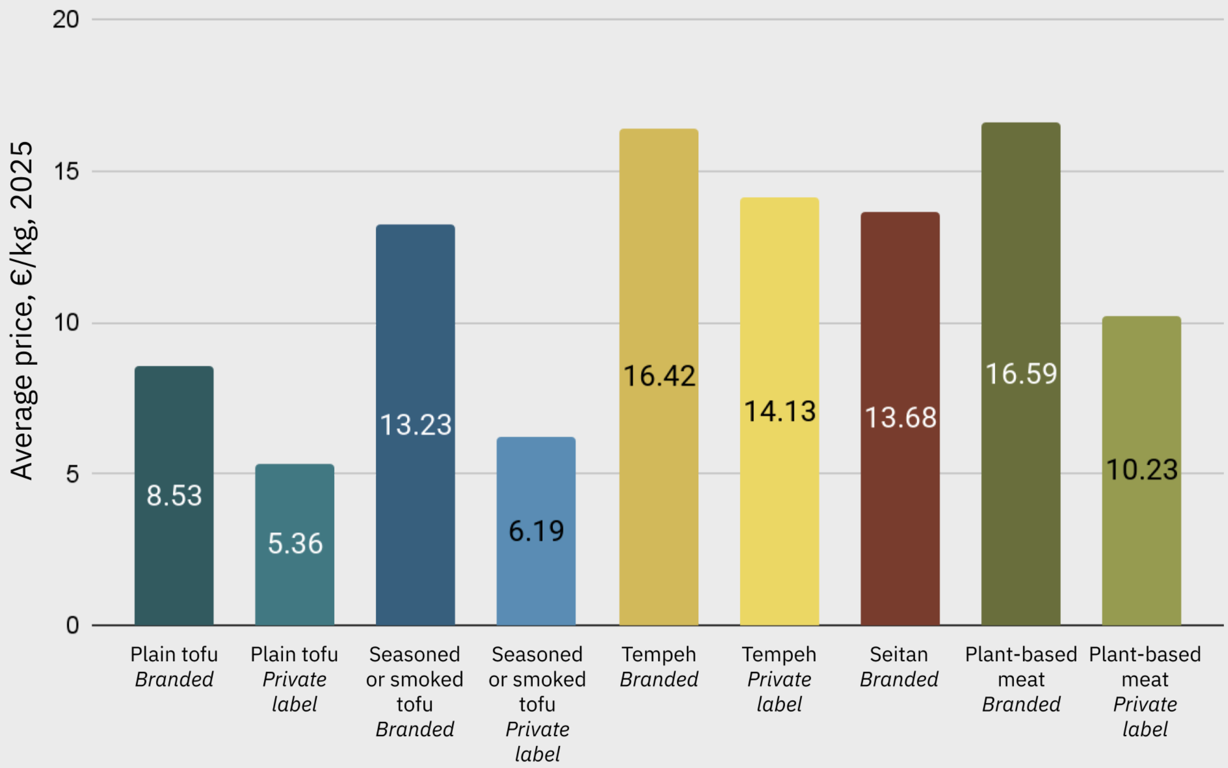
Tempeh and seitan were closer in price to plant-based meat.

Tofu's affordability may explain its much larger sales volume compared with tempeh and seitan. It is also more widely available in German supermarkets than tempeh and seitan.

Average price per kg for tofu, tempeh, seitan and plant-based meat in Germany, 2023-2025 (€/kg)



Average price per kg for tofu, tempeh, seitan and plant-based meat segments in Germany, by branded or private label, 2025 (€/kg)



Plant-based seafood

Total market

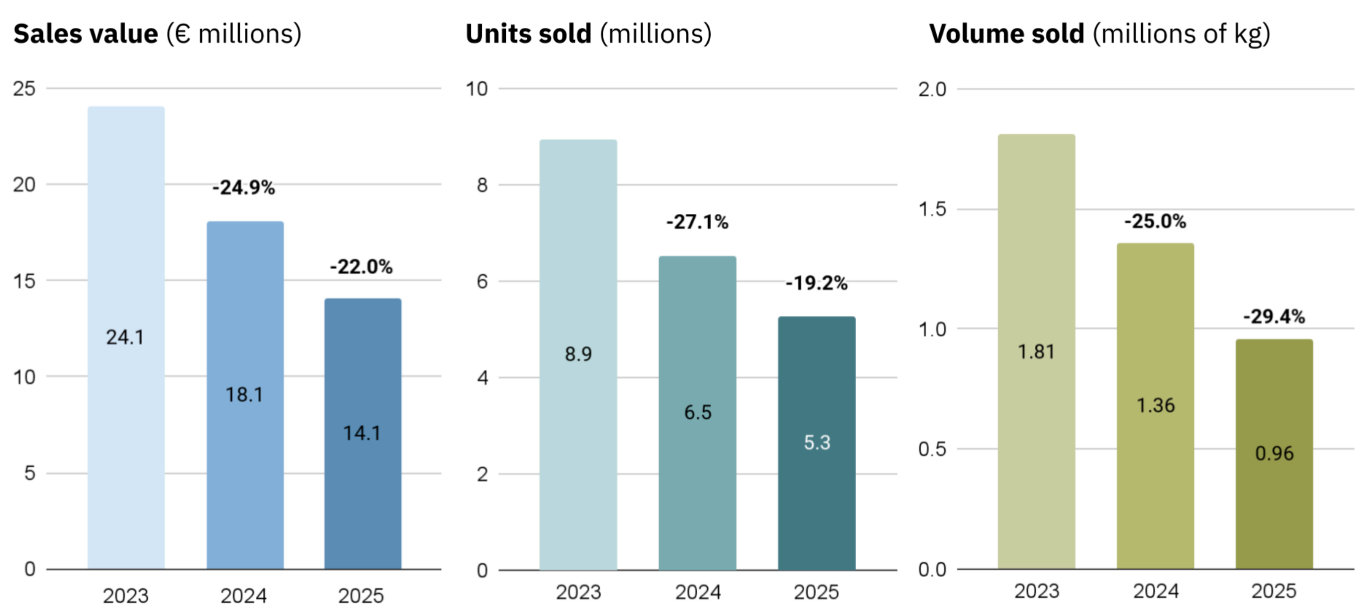
Germany's market for plant-based seafood nearly halved between 2023 and 2025.

In 2025, annual sales value fell by 22% to €14.1 million, 41% below 2023 levels. Unit sales fell 19% in 2025 to 5.3 million, 41% lower than in 2023. Sales volume fell 29% in 2025 to 958,000kg, a fall of 47% from 2023.

Plant-based seafood is a small and therefore volatile category. Several plant-based seafood lines that were available for sale in Germany are no longer widely available or have been discontinued. It is therefore possible that the significant fall in sales is linked to product withdrawals.

The ongoing double-digit decline suggests major challenges, possibly related to product performance. There is limited sensory research on plant-based seafood in Germany. However, two Italian studies from 2025 (on plant-based tuna and plant-based breaded fish) found that consumers preferred conventional fish over the plant-based samples, and identified several sensory issues including off-flavours, bitterness and unappealing texture and appearance. This suggests that further research is needed to fill knowledge gaps.

Plant-based seafood sales in Germany, 2023-2025



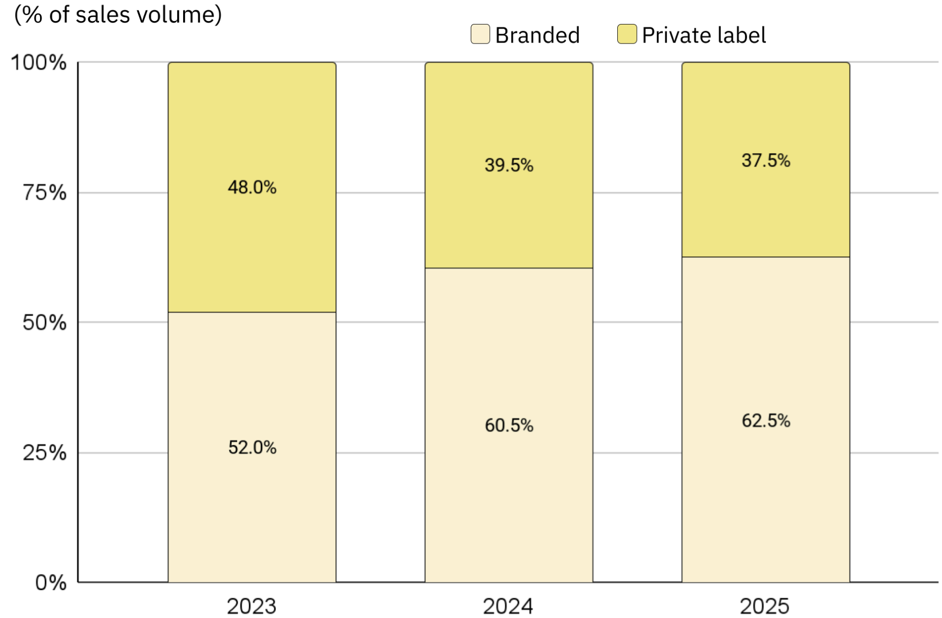
Branded versus private label

The proportion of private-label products fell from 48.0% of sales volume in 2023 to 37.5% in 2025.

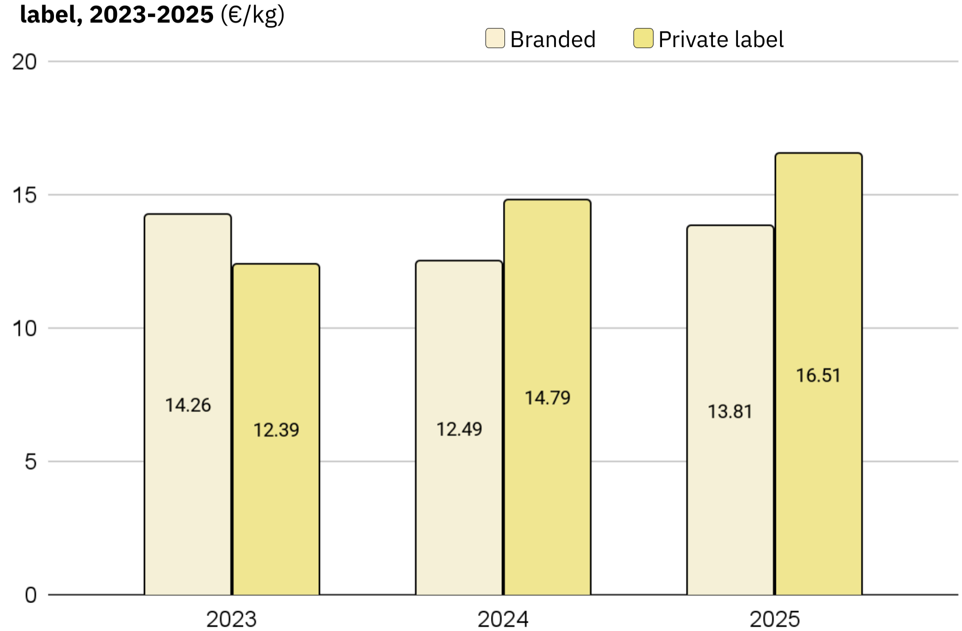
Both branded and private-label products saw declines in absolute sales volume during this period: 27% for branded and 66% for private label.

Unlike in other categories, private-label products were more expensive per kg than branded products in 2024 and 2025, perhaps driving the larger fall in private-label sales volume.

Germany plant-based seafood sales by branded or private label, 2023-2025
(% of sales volume)



Average price per kg of plant-based seafood in Germany, by branded or private label, 2023-2025 (€/kg)



Product format breakdown

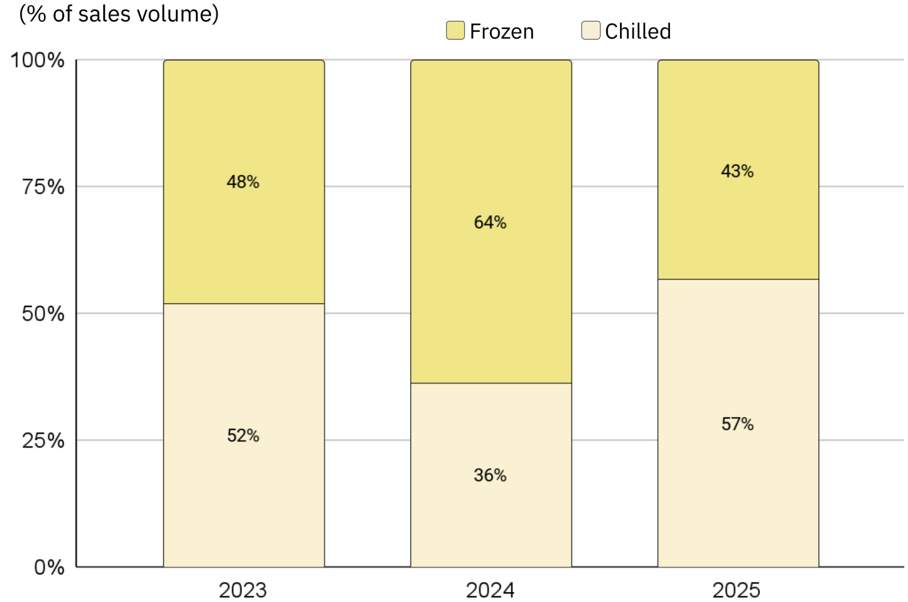
The proportion of frozen products rose from 48% in 2023 to 64% in 2024, before falling to 43% in 2025.

This pattern reflects volatility in both the frozen and chilled segments. Frozen products saw sales volume fall by more than half in 2025, and chilled sales volume declined significantly in 2024 before recovering by 10% in 2025.

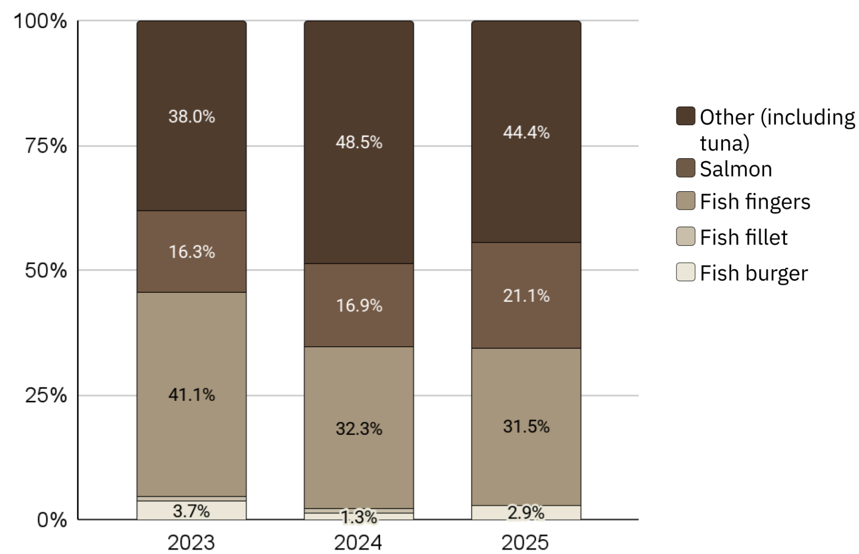
Sales volume of all formats fell between 2023 and 2025, with particularly steep falls for fish fillets (down 92%), fish fingers (down 60%) and fish burgers (down 59%). Although salmon-style products gained market share, they saw a 31% decline in sales volume over the same time period.

The “other” category includes items such as plant-based tuna, shrimp and white fish.

Germany plant-based seafood sales by temperature, 2023-2025
(% of sales volume)



Germany plant-based seafood sales by format, 2023-2025 (% of sales volume)

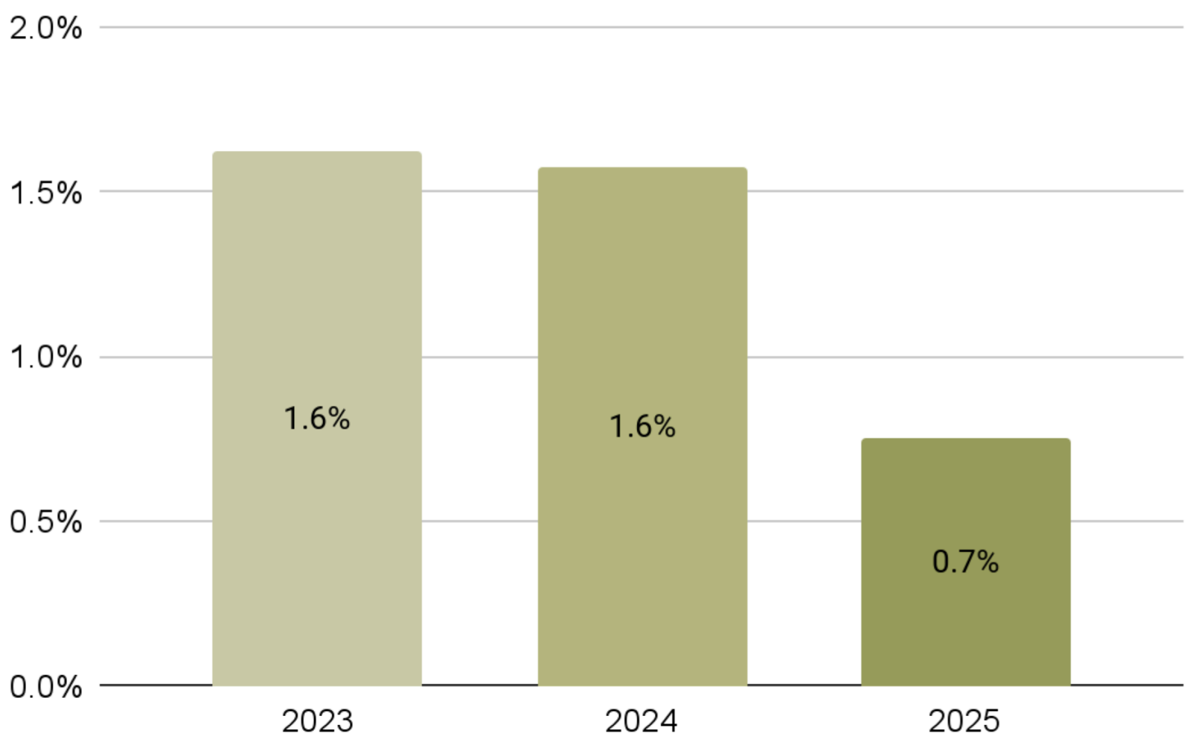


Market share

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 overall frozen seafood sales volume in 2023 and 2024, falling to 0.7% in 2025. The sales volume of frozen animal-based seafood remained steady in 2025, so the decline in market share was driven by falling plant-based sales.

Frozen plant-based seafood: share of Germany's total (plant- and animal-based) frozen pre-packaged seafood market, 2023-2025 (% of sales volume)

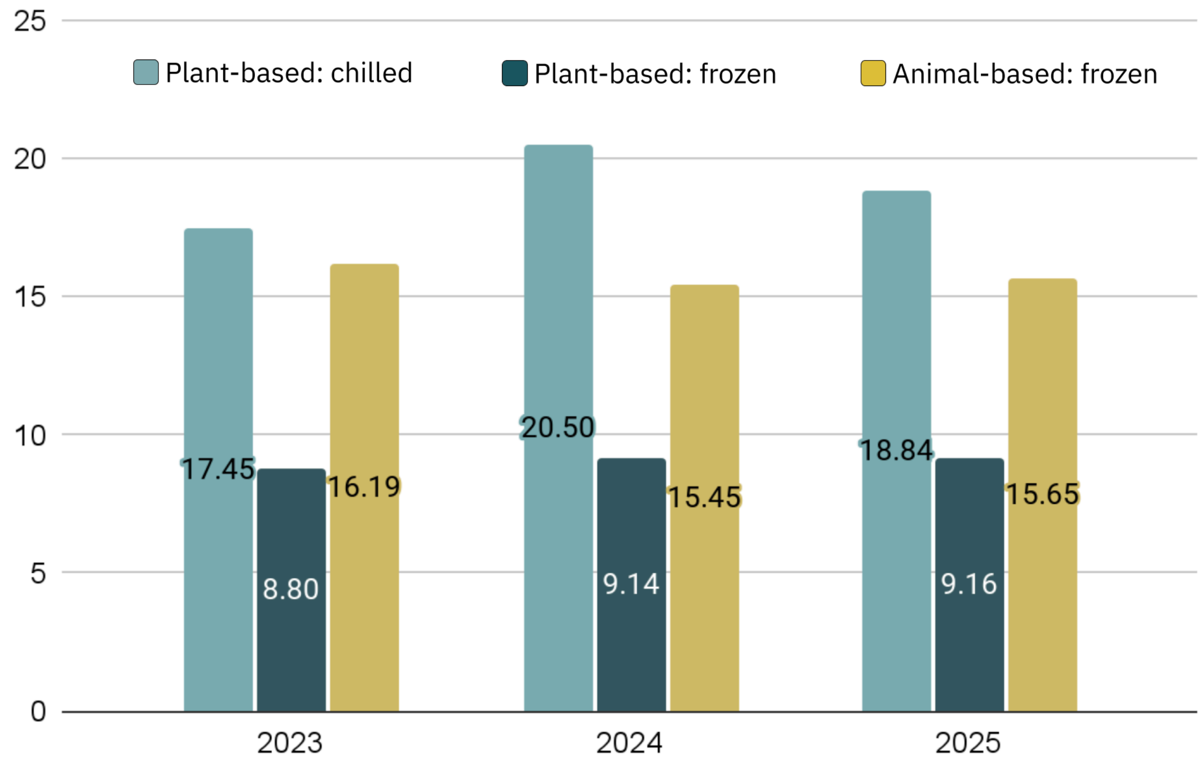


Price trends relative to animal equivalent

Chilled plant-based seafood was markedly more expensive (€18.84/kg) in 2025 than frozen plant-based seafood (€9.16/kg), partly because the majority of the frozen segment consists of fish fingers, a relatively low-cost product. The chilled segment also includes more expensive options, such as plant-based salmon.

Animal-based seafood data was only available for frozen products. Frozen plant-based seafood was 41% cheaper per kg than frozen animal-based seafood in 2025. However, the comparison is not like-for-like, because animal-based seafood is a broad category containing many premium products, such as lobster.

Average price per kg for plant-based and animal-based fish and seafood in Germany, 2023-2025 (€/kg)



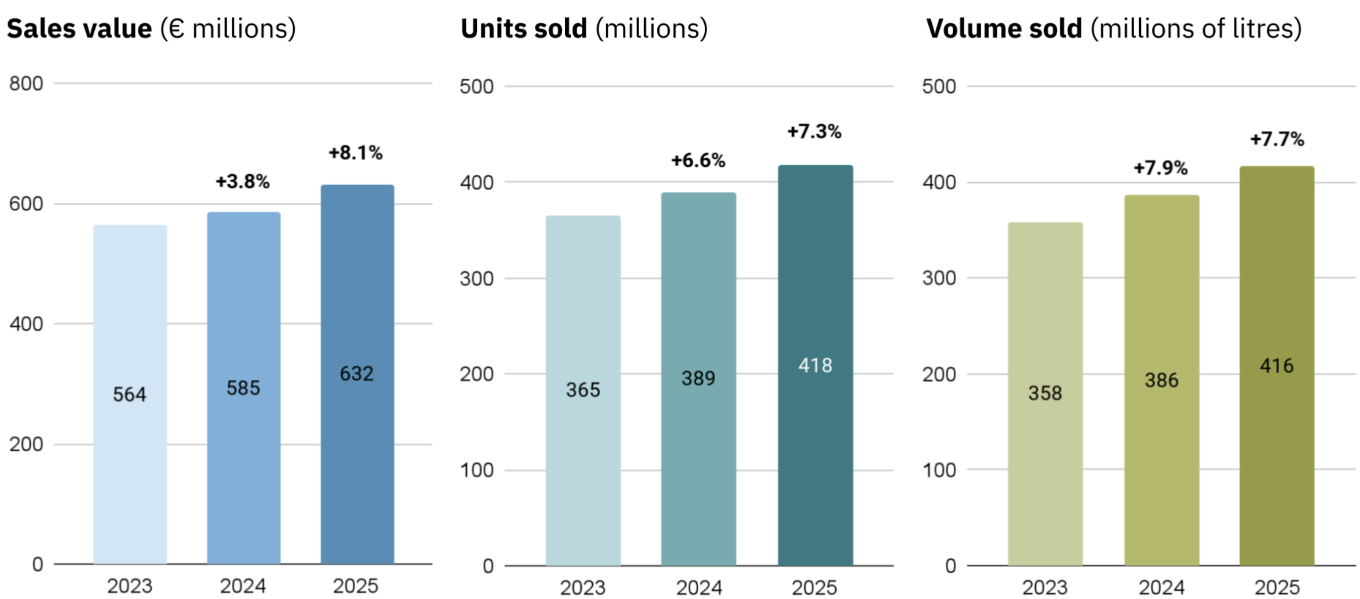
Plant-based milk and drinks

Total market

Germany's plant-based milk and drinks[5] market grew steadily between 2023 and 2025, possibly driven by ongoing improvements in affordability relative to animal-based milk. Research suggests that German consumers are choosing plant-based milk for health and animal welfare reasons, and that taste, texture and price are the top factors influencing purchasing decisions.

In 2025, annual sales value reached €632 million, up by 8.1% from 2024 and 12.1% from 2023. Unit sales rose by 7.3% to 418 million in 2025, 14.3% higher than in 2023. Sales volume rose by 7.7% in 2025, reaching 416 million litres, up by 16.2% from 2023.

Plant-based milk and drinks sales in Germany, 2023-2025



[5] 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.

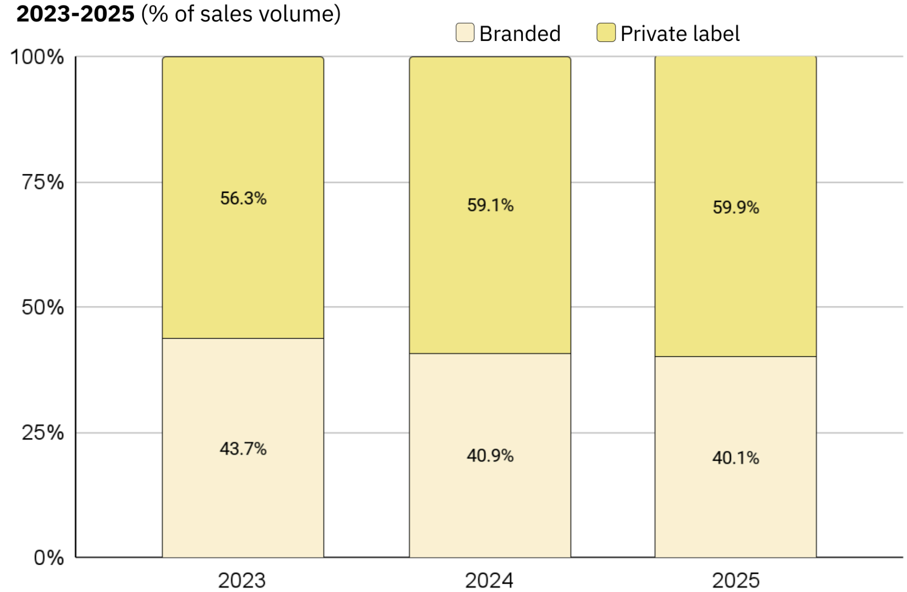
Branded versus private label

The majority of sales were from private-label products, which accounted for 60% of sales volume in 2025 (up from 56% in 2023).

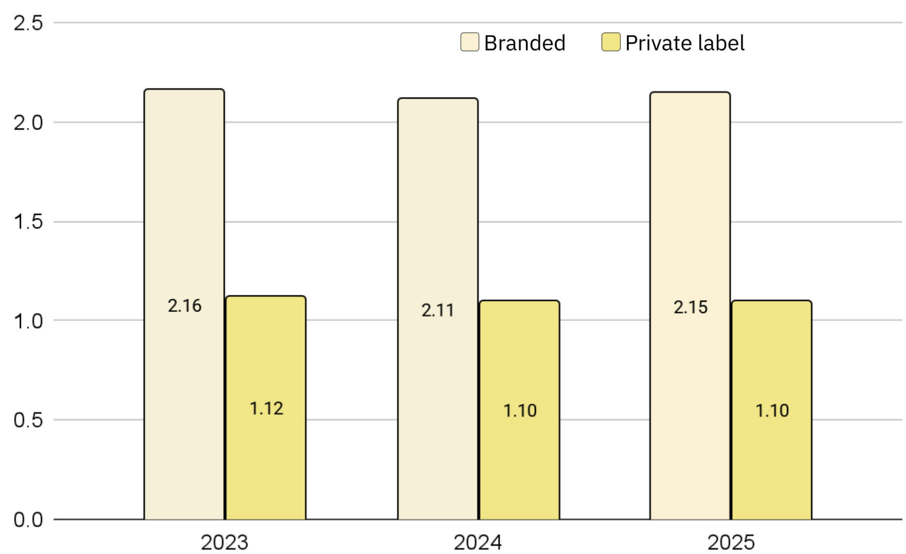
Their strong performance is likely linked to their much greater affordability: branded products were nearly double the price per litre throughout 2023 to 2025.

The large share of private-label sales also suggests that these products are meeting consumer expectations around taste and functionality.

Germany plant-based milk and drinks sales by branded or private label, 2023-2025 (% of sales volume)

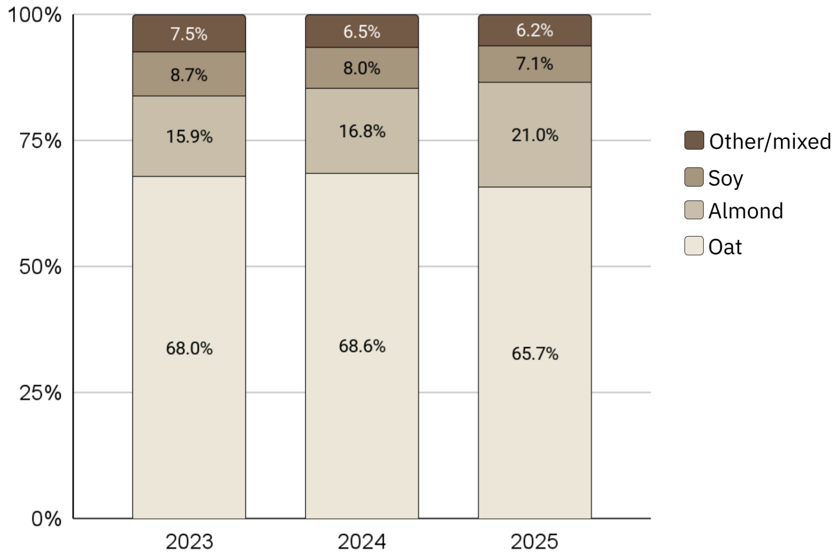


Average price per litre of plant-based milk and drinks in Germany, by branded or private label, 2023-2025 (€/l)



Product format breakdown

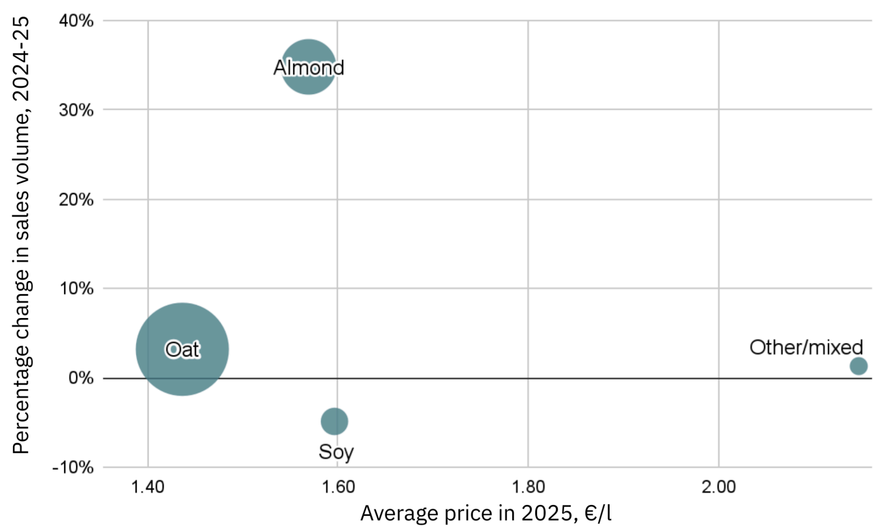
Germany plant-based milk and drinks sales by base ingredient, 2023-2025
(% of sales volume)



The majority of plant-based milk and drinks for which Circana data is available were ambient, with less than 1% of sales volume coming from chilled products in 2025.

Oat milk and drinks accounted for roughly two-thirds of sales volume, but their market share fell slightly in 2025 (despite an increase in absolute sales volume). Those based on almonds saw 54% growth in sales volume between 2023 and 2025, reaching 21% market share. Soy-based products saw a 5% fall in sales volume between 2023 and 2025, leading to a slight decline in market share.

Average price versus sales volume change, plant-based milk by base ingredient*, Germany



Bubble size represents sales volume in 2025.

There was no clear link between price and sales volume growth in 2025, with oat milk (€1.44/kg on average) seeing lower growth than almond milk (€1.57/kg) despite being the most affordable segment.

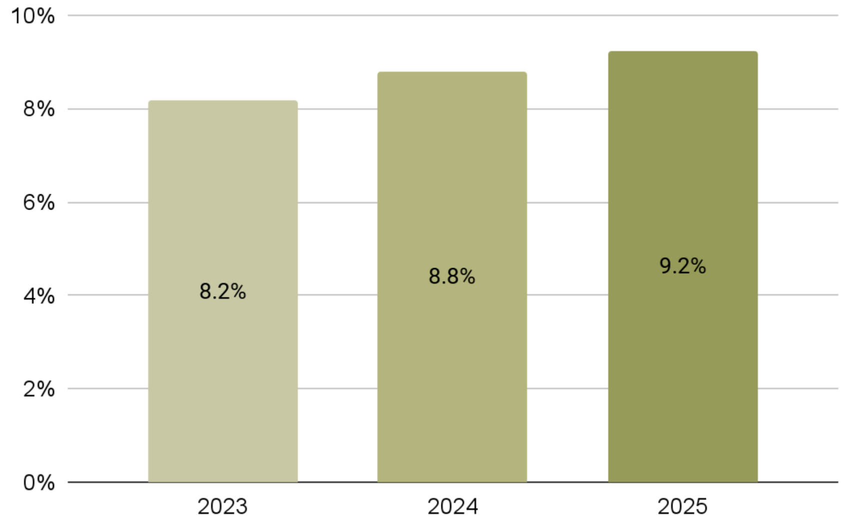
With 55 of the 275 products in the plant-based milk and drinks category being barista-style products, it is likely that product performance is another important driver of sales.

Market share

The market share of plant-based milk and drinks, as a proportion of total plant- and animal-based milk[6] sales volume, rose steadily from 8.2% in 2023 to 9.2% in 2025. This means that plant-based milk and drinks are the most successful plant-based category in Germany.

The growth in market share was driven by rising plant-based sales, as animal-based milk sales volume remained steady over this period.

Plant-based milk and drinks: share of Germany's total (plant- and animal-based) milk and drinks market, 2023-2025 (% of sales volume)

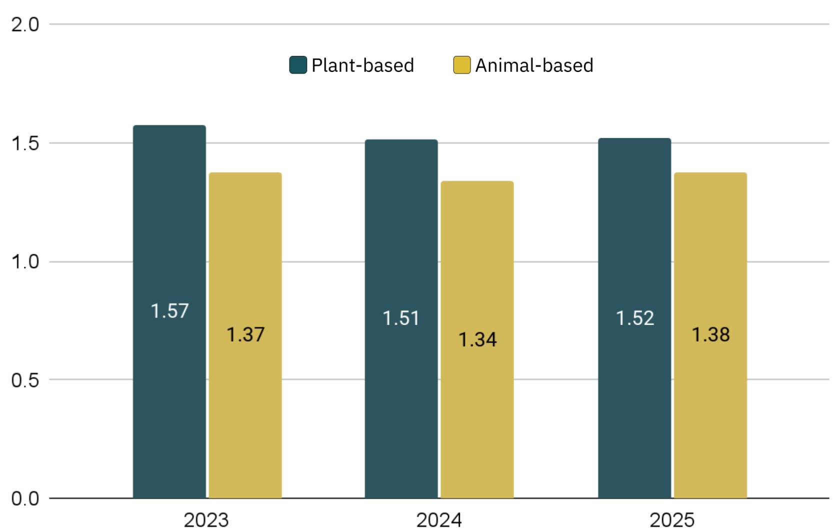


Price trends relative to animal equivalent

The price per litre of plant-based milk and drinks fell between 2023 and 2025, while the cost of animal-based milk remained roughly level.

As a result, while plant-based options were 15% more expensive per litre in 2023, this gap had fallen to 10% by 2025, likely contributing to rising sales.

Average price per litre for plant-based and animal-based milk and drinks in Germany, 2023-2025 (€/l)



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

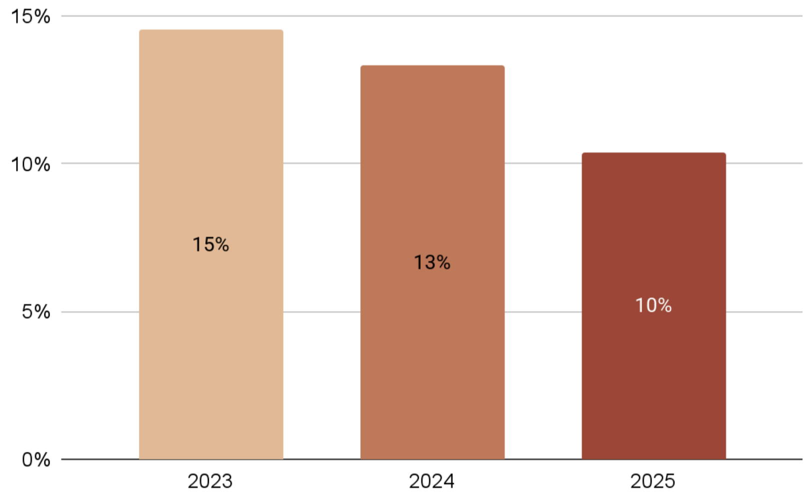
Note that in Germany, plant-based milk is taxed at 19%, while animal-based milk is taxed at only 7%. As the sales value data in this report already includes these taxes, if the products were taxed equally, plant-based milk and drinks would be roughly the same price, on average, as animal-based milk.

When comparing only branded products, the plant-based premium was 15% in 2025.

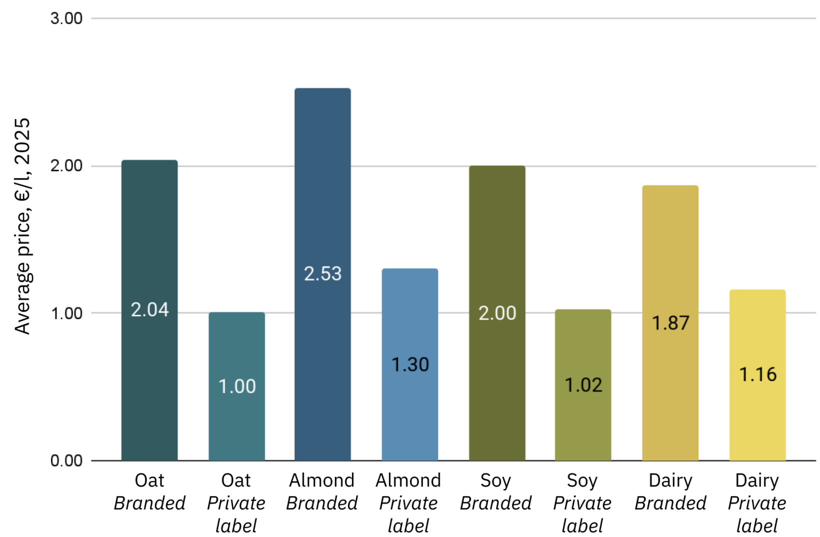
However, when comparing only private-label products in 2025, plant-based options were 5.6% cheaper per litre (€1.10/l), on average, than private-label animal-based milk (€1.16/l).

Looking at specific segments, both private-label oat and private-label soy milk were cheaper than private-label animal-based milk in 2025. Private-label oat, at €1.00/l, was 14% cheaper than private-label dairy milk.

Price difference for plant-based milk and drinks compared to animal-based milk and drinks in Germany, 2023-2025 (% difference based on €/l)



Average price per litre for selected plant-based and animal-based milk and drinks in Germany, by branded or private label, 2025 (€/l)

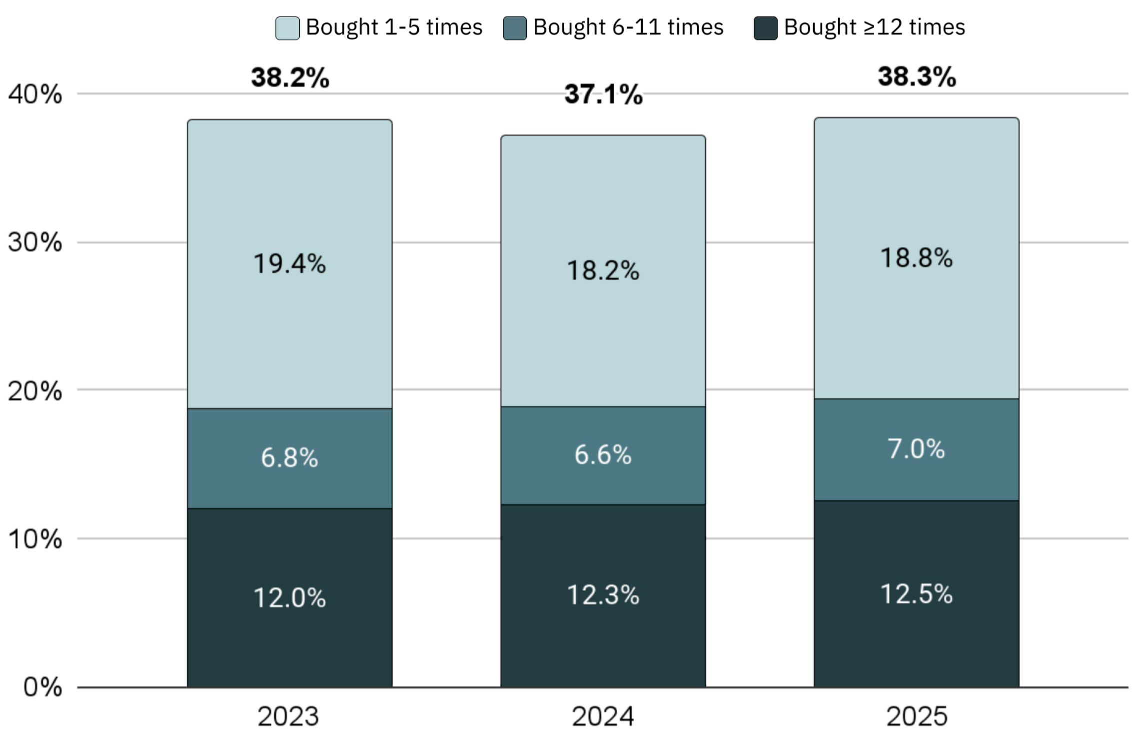


Household panel data

Household panel data from NIQ Homescan shows that the proportion of households in Germany that purchased plant-based milk at least once per year dipped to 37.1% in 2024 before rising again to 38.3% in 2025 (roughly the same as with 2023 levels). The proportion of frequent purchasers – those who bought 12 or more times per year – rose from 12.0% in 2023 to 12.5% in 2025.

This NIQ Homescan data is not directly comparable to the Circana retail sales data shown above. However, the patterns suggest that the 16% increase in retail sales volume from 2023 to 2025 is likely to have come mostly from higher sales among existing customers, rather than reaching new audiences.

Annual household purchase patterns for plant-based milk in Germany, 2023-2025 (% of households)



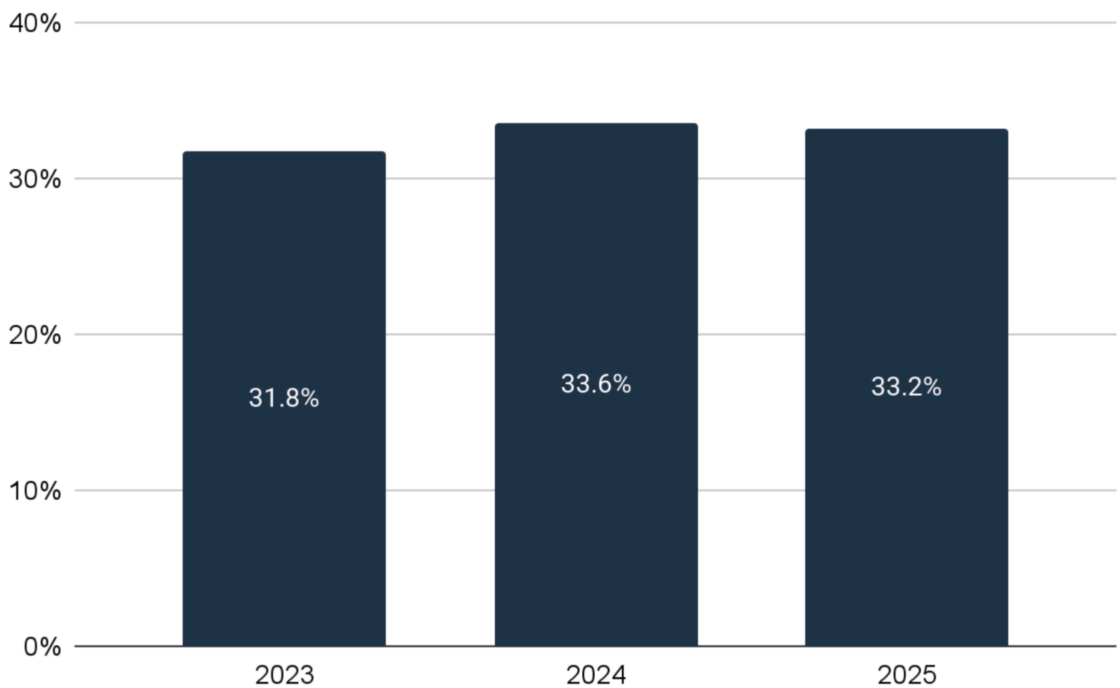
Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in Germany. The data covers 'Take Home' shopping and comes from a sample of 25,000 households. Data covers "plant-based milk".

The NIQ Homescan data also shows that the proportion of sales value from discounter stores (such as Aldi and Lidl)[7] rose slightly from 31.8% in 2023 to 33.6% in 2024, before falling slightly in 2025.

Both mainstream supermarkets and discounters offer private-label products; however, the shift towards discounters seen during 2024 mirrors the rise of private-label products during that year (shown by the Circana data above).

It is possible that the shift towards discounters and private-label products in 2024, and their subsequent levelling off, was linked to inflation in the wider food sector. Germany saw historically high food inflation in early 2023, but this has since fallen.

Household purchase patterns for plant-based milk in Germany: proportion of sales value from discounter stores, 2023-2025 (%)



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 25,000 households. Data covers "plant-based milk".

---

[7] Note that the proportions of sales from discounters reported for 2023 and 2024 here are lower than those reported in the previous edition of this report. This is due to expansion of the household panel sample size and improved calibration by NIQ, resulting in more accurate data.

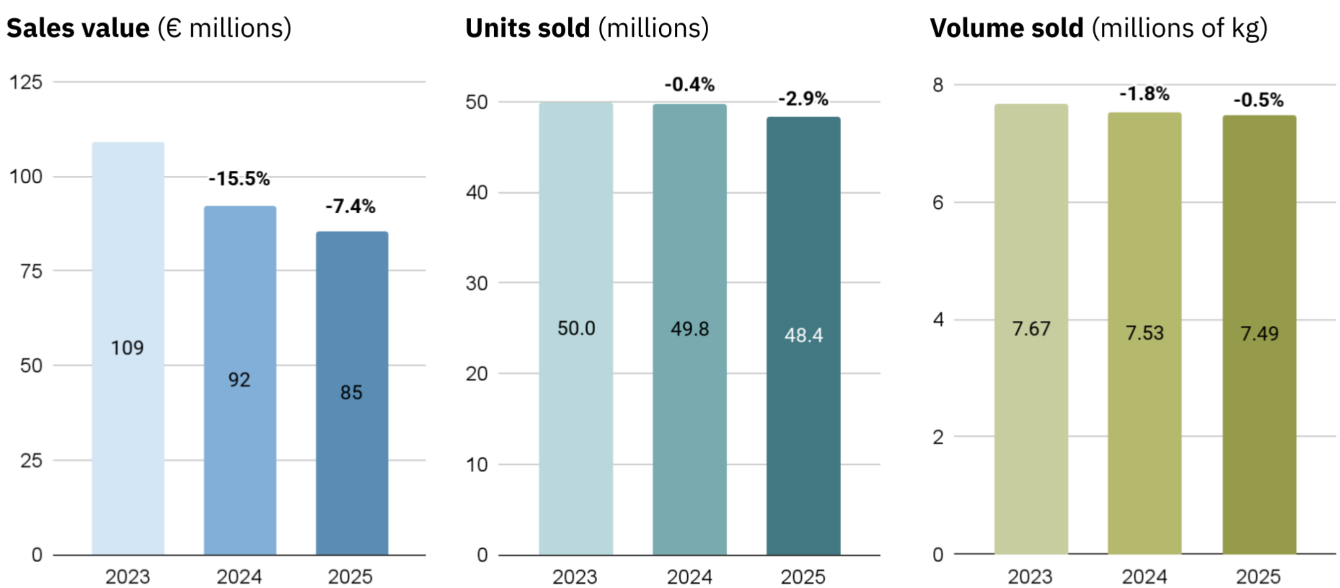
Plant-based cheese

Total market

Despite significant improvements in affordability relative to animal-based cheese, the quantity of plant-based cheese sold in Germany remained steady in 2025.

Annual sales value fell to €85 million, down by 7.4% from 2024 and down by 21.8% from 2023. Unit sales fell less steeply, by 2.9% in 2025 to 48.4 million, which was 3.2% lower than in 2023. Sales volume remained roughly steady in 2025, falling 0.5% to 7.49 million kg, which was 2.3% lower than in 2023.

Plant-based cheese sales in Germany, 2023-2025



Branded versus private label

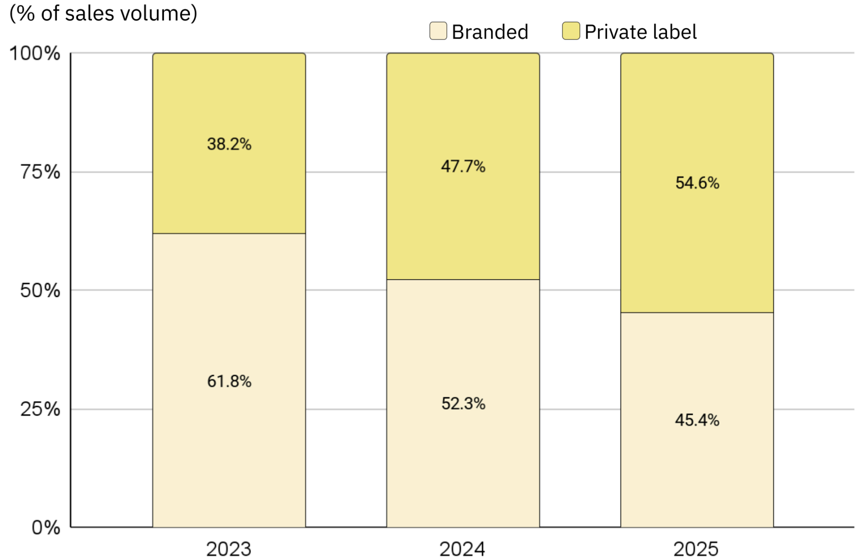
The share of Germany's plant-based cheese market that is private-label grew from 38% in 2023 to 55% in 2025.

This was caused by a combination of falling branded sales volume (down 28% between 2023 and 2025) and rising private-label sales volume (up 40%).

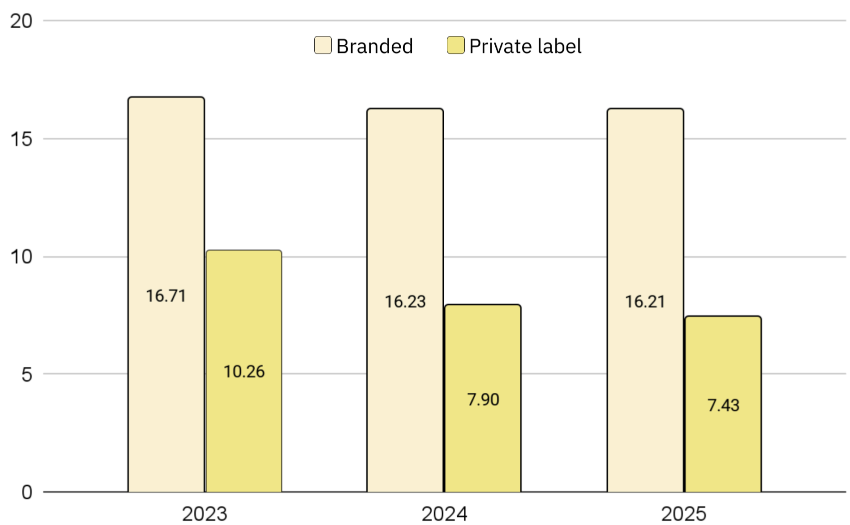
Private-label plant-based cheeses were consistently cheaper than branded. In 2023, they were, on average, 39% cheaper per kg than branded options. By 2025, they were 54% cheaper.

This price advantage may explain the growing private-label share of sales volume.

Germany plant-based cheese sales by branded or private label, 2023-2025 (% of sales volume)



Average price per kg of plant-based cheese in Germany, by branded or private label, 2023-2025 (€/kg)

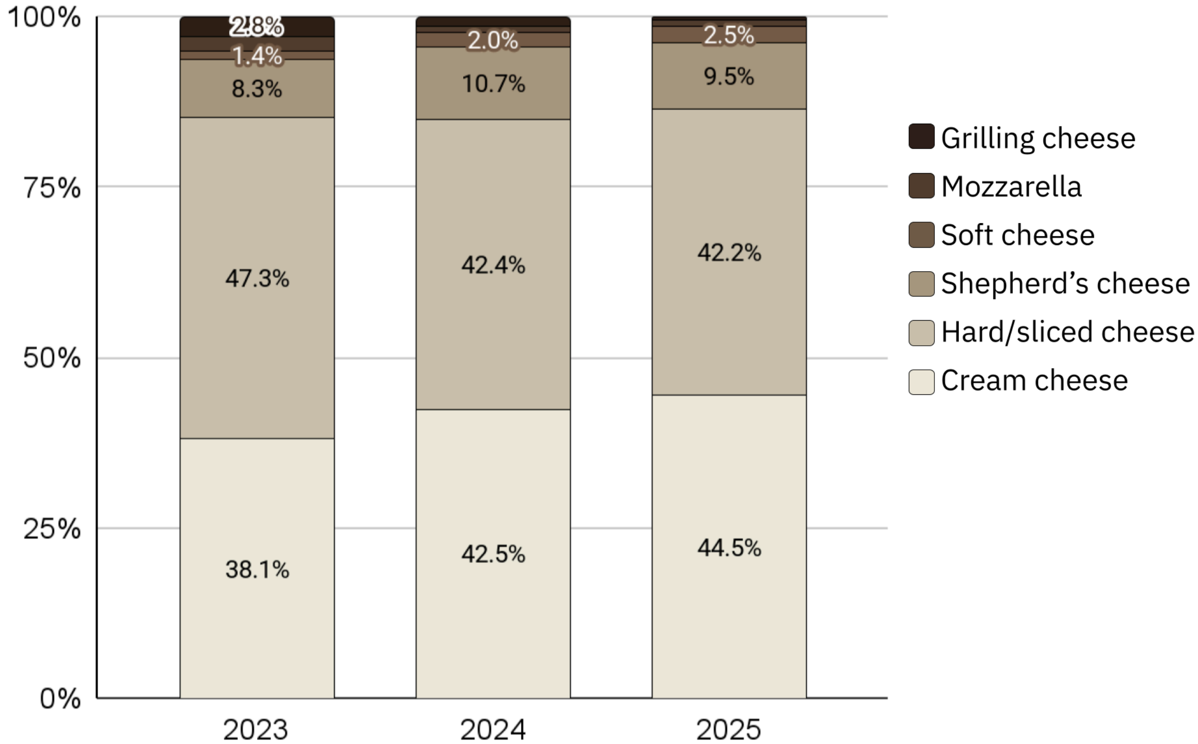


Product format breakdown

The majority of plant-based cheese sales in 2025 were cream cheese (44.5% of sales volume), hard/sliced cheese (42.2%) and shepherd's cheese[8] (9.5%).

Cream cheese, which gained market share between 2023 and 2025, was also the most affordable type in 2025, at an average of €10.19/kg. Hard/sliced cheese was the second most affordable, at €11.33/kg. In contrast, mozzarella-style cheese cost €18.59/kg.

Germany plant-based cheese sales by type, 2023-2025 (% of sales volume)

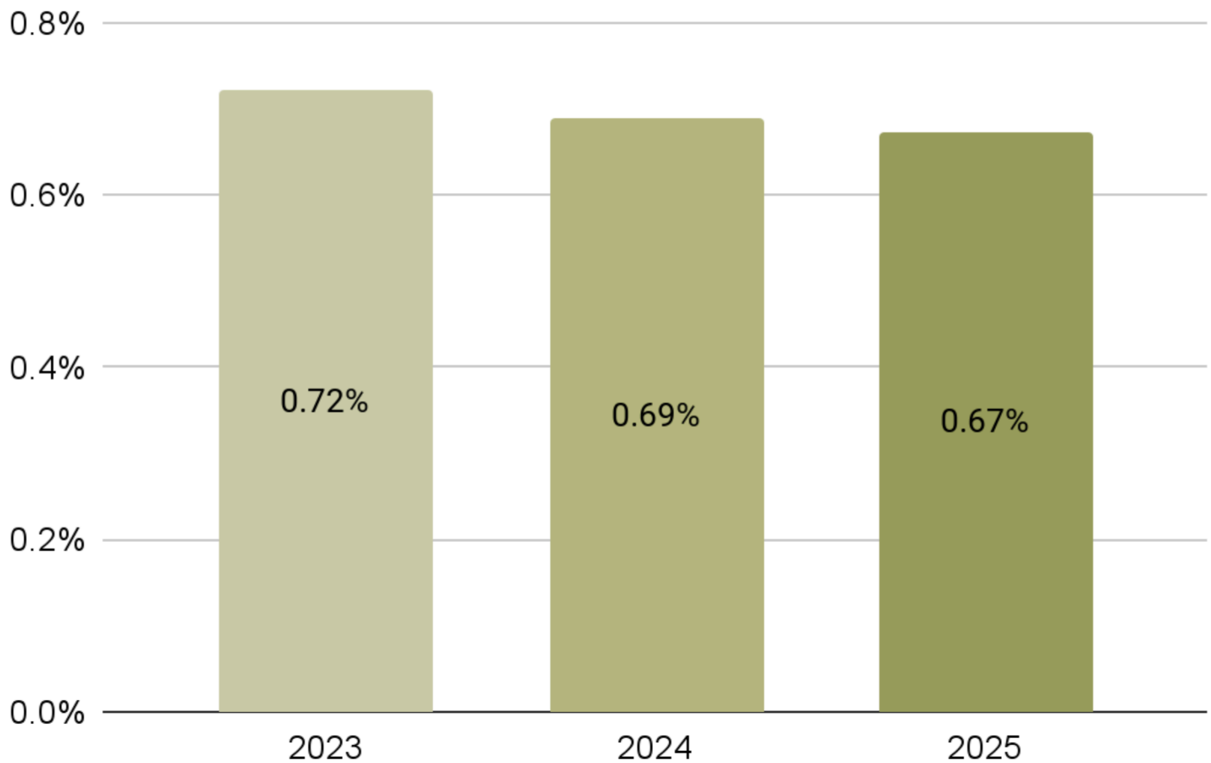


[8] *Hirtenkäse*, a German term used to describe a category of cheese in brine, such as feta.

Market share

The market share of plant-based cheese, as a percentage of the sales volume of both plant- and animal-based cheese, fell slightly from 0.72% in 2023 to 0.67% in 2025, driven by a 5% increase in animal-based cheese sales volume over that time, as well as falling plant-based sales volume.

Plant-based cheese: share of Germany's total (plant- and animal-based) cheese market, 2023-2025 (% of sales volume)



Price trends relative to animal equivalent

The price of plant-based cheese fell steadily between 2023 and 2025, driven mainly by falling prices in the private-label segment.

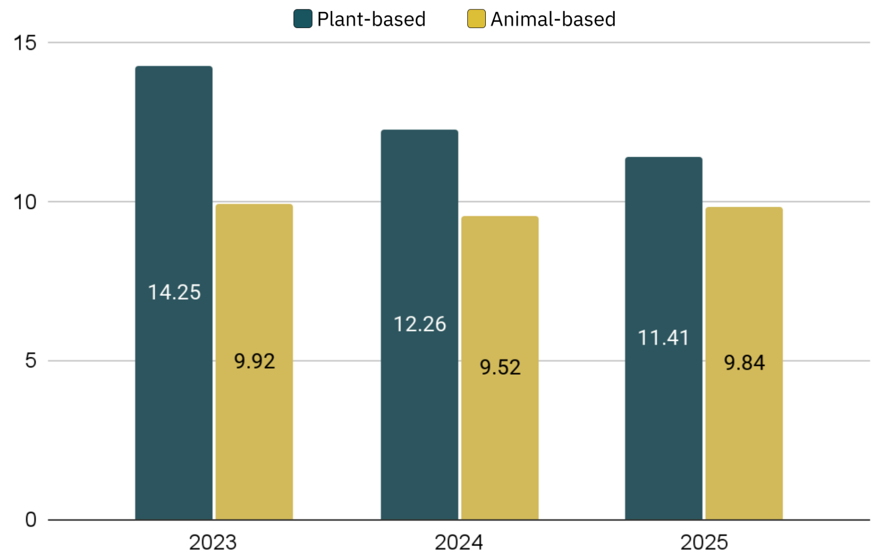
Meanwhile, animal-based cheese prices rose slightly in 2025.

As a result, plant-based cheese went from being 44% more expensive per kg than animal-based cheese in 2023 to just 16% more expensive in 2025.

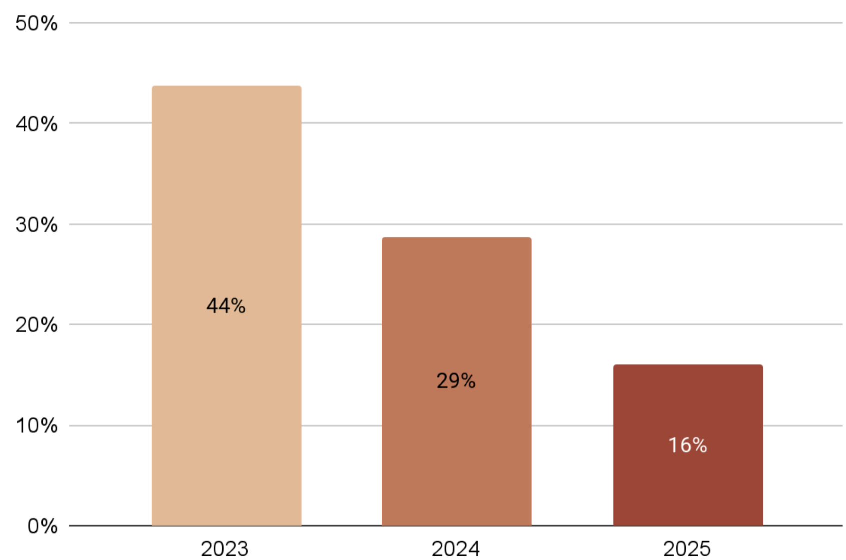
However, when comparing only private-label products, plant-based cheese actually went from 16% more expensive in 2023 to 15% cheaper in 2025.

Branded plant-based cheese was 30% more expensive than branded animal-based cheese in 2025.

Average price per kg for plant-based and animal-based cheese in Germany, 2023-2025 (€/kg)



Price difference for plant-based cheese compared to animal-based cheese in Germany, 2023-2025 (% difference based on €/kg)



The fact that sales volume fell slightly between 2023 and 2025 despite significant progress on affordability suggests that the taste and functionality of plant-based cheese products will also need to improve to reach a wider audience.

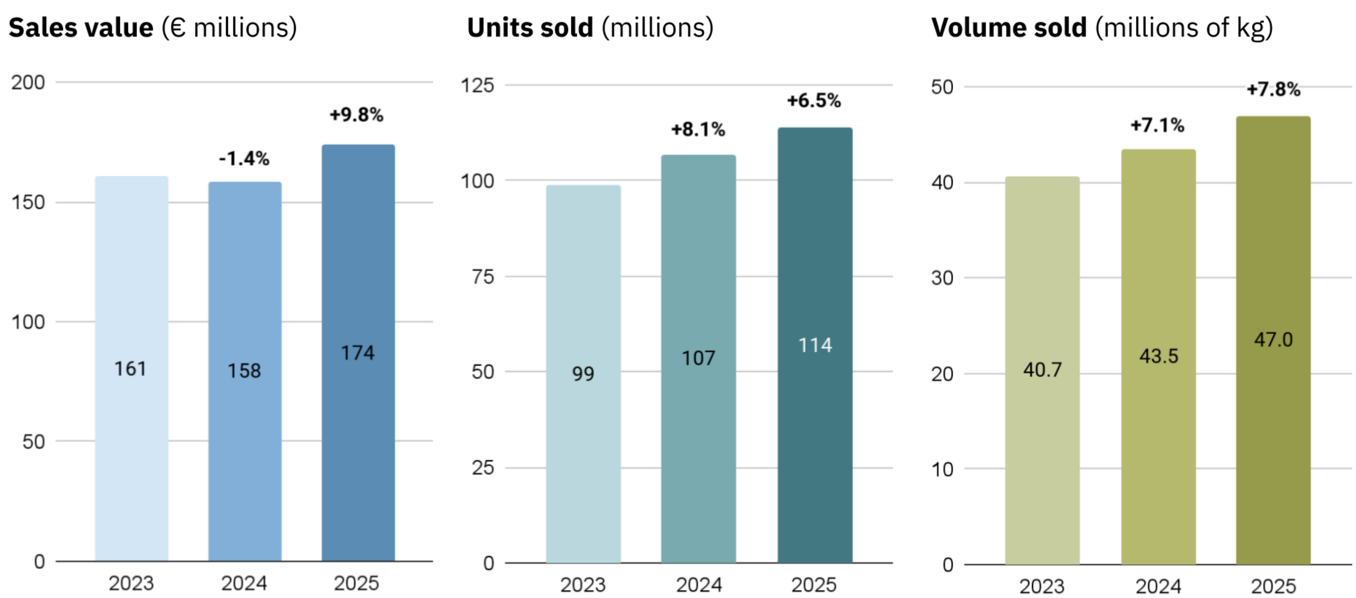
Plant-based yoghurt

Total market

Germany's plant-based yoghurt market is growing, possibly driven by increasing affordability relative to animal-based yoghurt.

In 2025, annual sales value rose by 9.8% to €174 million, following a 1.4% dip in 2024. Unit sales reached 114 million in 2025, up by 6.5% from 2024 and up by 15.2% since 2023. Sales volume grew by 7.8% in 2025 to 47 million kg, a rise of 15.5% from 2023.

Plant-based yoghurt sales in Germany, 2023-2025



Branded versus private label

There was a disparity between the steady overall sales value of plant-based yoghurt in 2024 and rising sales volume. This can be explained by the jump in the fraction of private-label sales during this year.

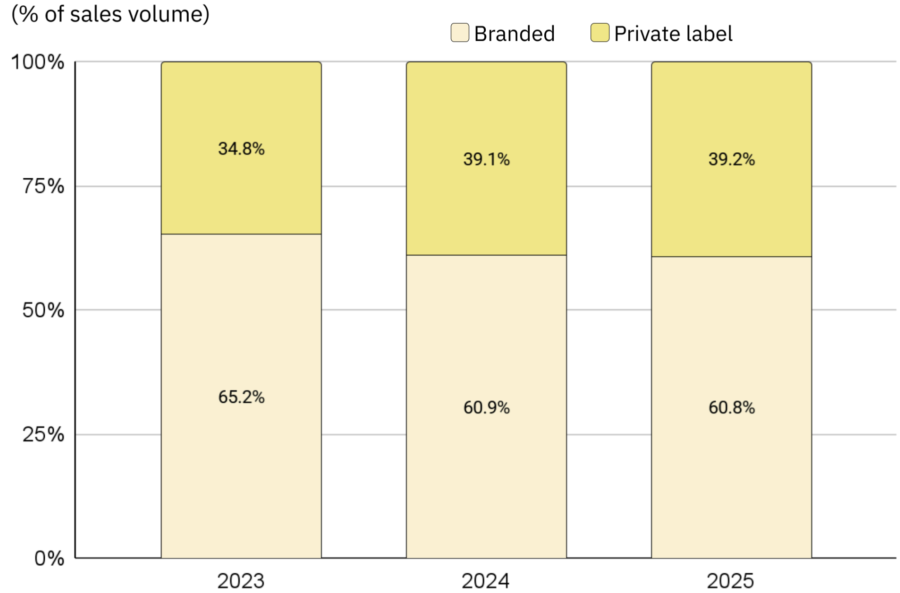
Private-label plant-based yoghurt has consistently been cheaper per kg than branded, with the gap widening in 2024.

In 2024, the proportion of sales volume from private-label products also rose, which meant the average price per kg of plant-based yoghurt fell from €3.95 in 2023 to €3.64 in 2024.

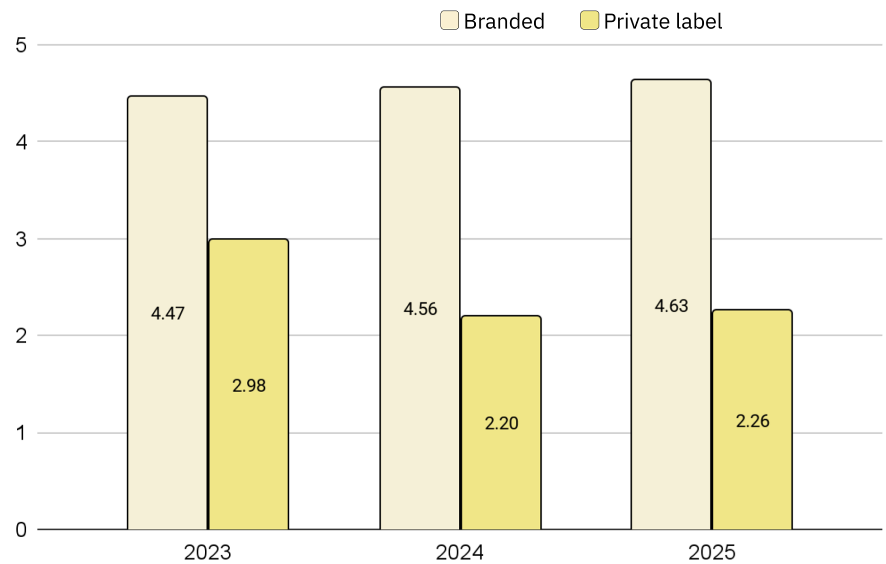
As a result, sales value remained steady while sales volume rose.

In 2025, there was no major shift in the average price or market share of private-label plant-based yoghurt.

Germany plant-based yoghurt sales by branded or private label, 2023-2025
(% of sales volume)



Average price per kg of plant-based yoghurt in Germany, by branded or private label, 2023-2025 (€/kg)

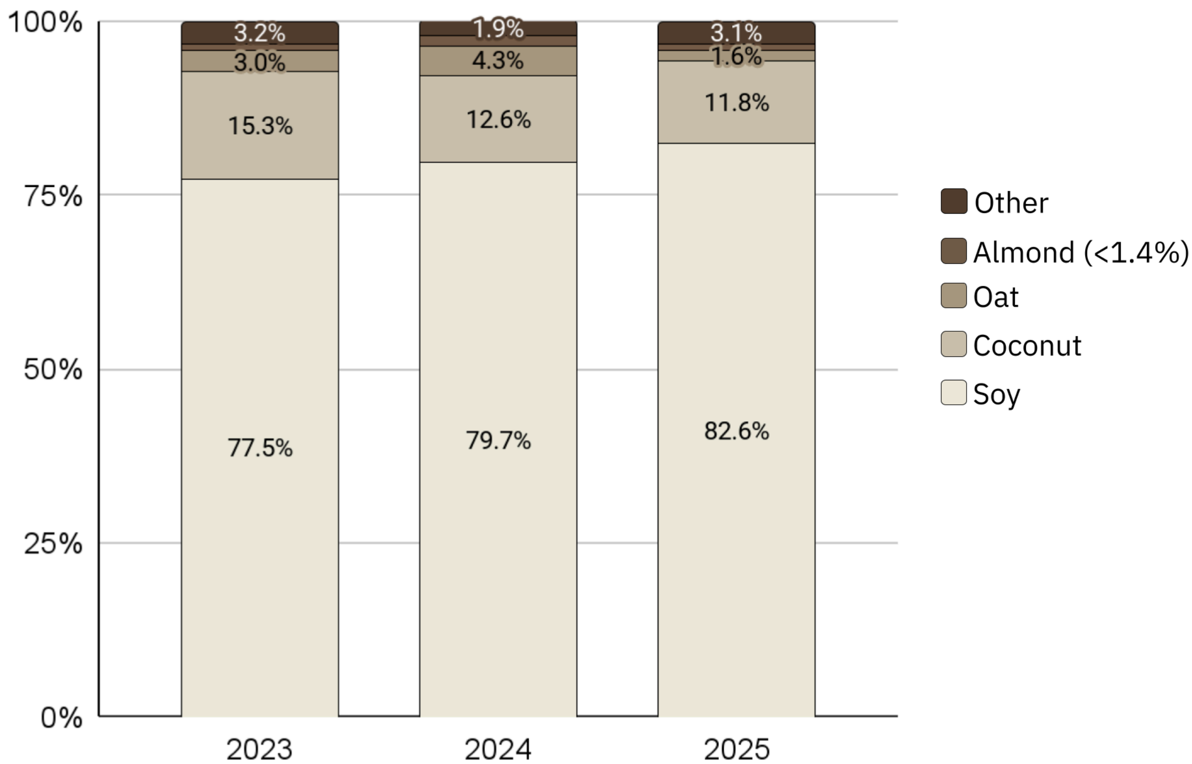


Product format breakdown

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 2023 and 2025.

Soy yoghurt is the best-selling type, with its market share growing from 78% of sales volume in 2023 to 83% in 2025. Soy yoghurt is also the most affordable of the main options available, at €3.64/kg in 2025, compared with €3.84/kg for coconut yoghurt, €4.86 for oat yoghurt and €3.92/kg for almond yoghurt.

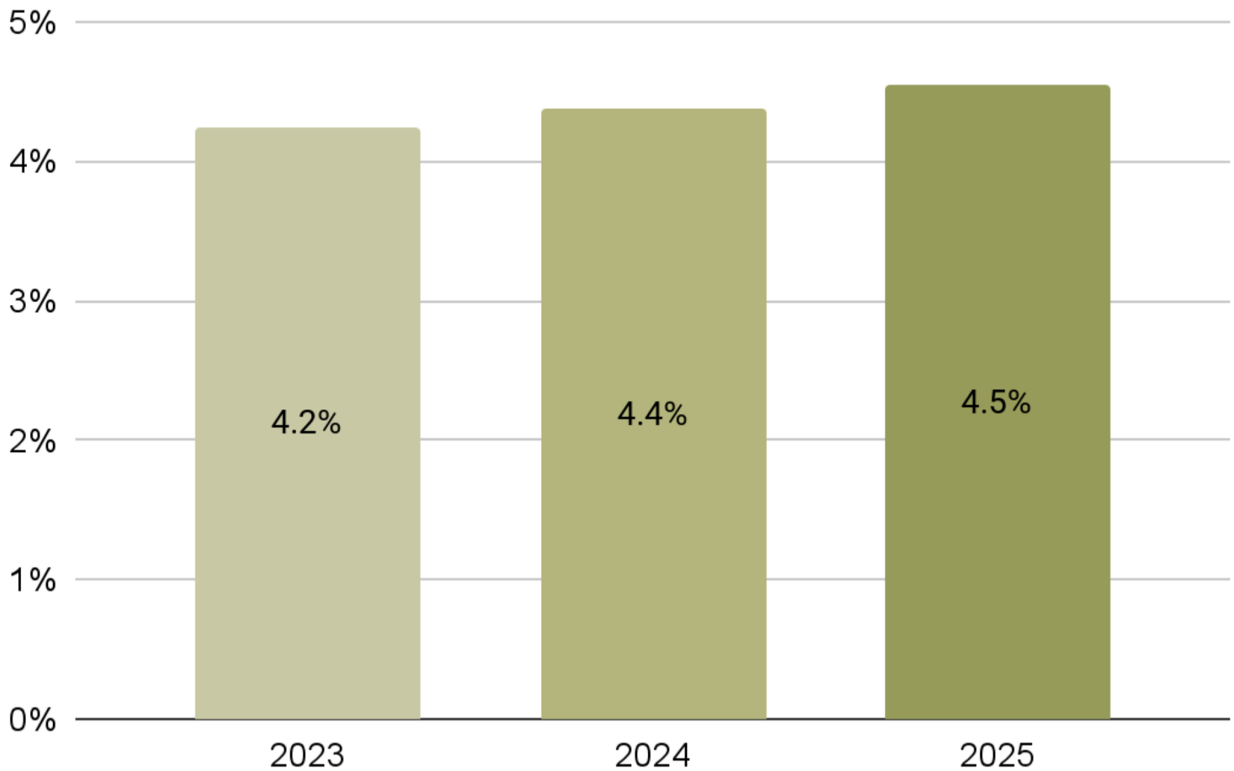
Germany plant-based yoghurt sales by ingredient base, 2023-2025
(% of sales volume)



Market share

The market share of plant-based yoghurt (as a percentage of total plant- and animal-based yoghurt sales volume) rose from 4.2% in 2023 to 4.5% in 2025, despite a 7.7% rise in the sales volume of animal-based yoghurt between 2023 and 2025.

Plant-based yoghurt: share of Germany's total (plant- and animal-based) yoghurt market, 2023-2025 (% of sales volume)



Price trends relative to animal equivalent

The average price per kg of plant-based yoghurt dipped in 2024 before rebounding slightly. However, at €3.70/kg in 2025, it remained cheaper than it was in 2023.

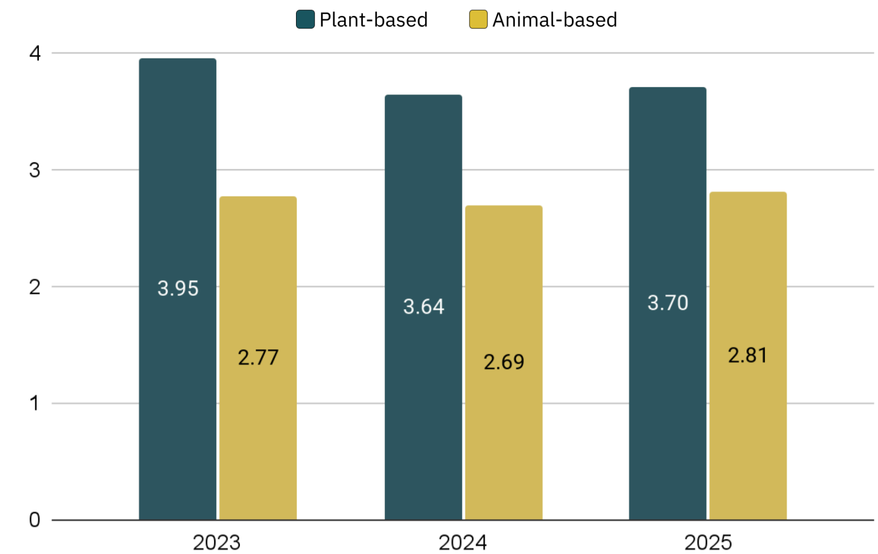
Meanwhile, the price of animal-based yoghurt rose between 2023 and 2025.

As a result, the price gap narrowed over time: while plant-based yoghurt was 43% more expensive per kg in 2023, it was just 32% more expensive in 2025.

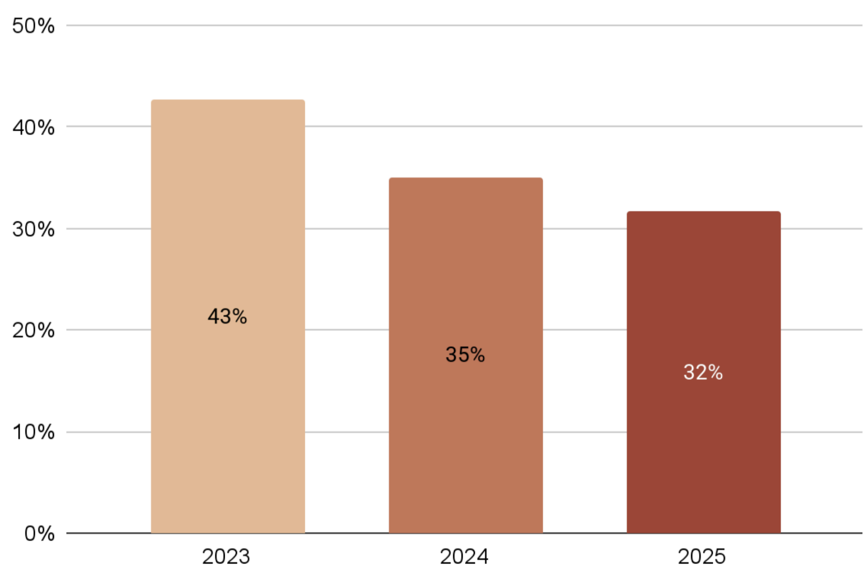
Private-label plant-based yoghurt almost achieved price parity with private-label animal-based yoghurt in 2025, being just 1% more expensive (compared with 36% more expensive in 2023).

When comparing only branded products, plant-based options were 29% more expensive in 2025.

Average price per kg for plant-based and animal-based yoghurt in Germany, 2023-2025 (€/kg)



Price difference for plant-based yoghurt compared to animal-based yoghurt in Germany, 2023-2025 (% difference based on €/kg)



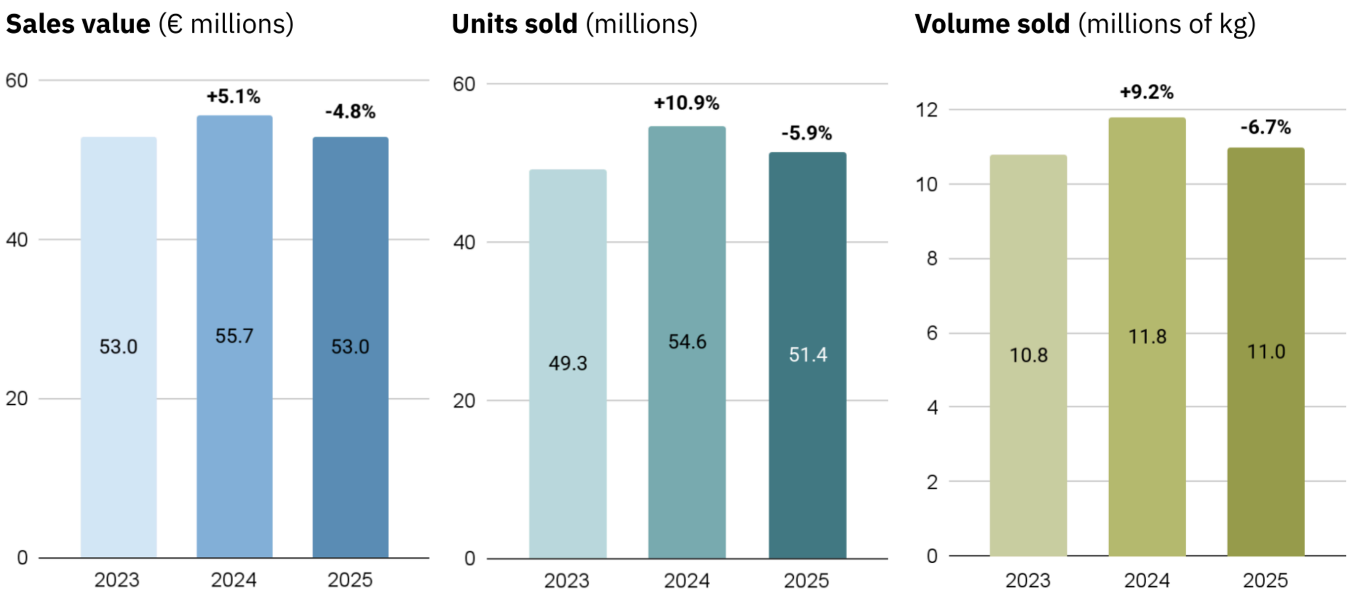
Plant-based cream

Total market

Germany's plant-based cream market peaked in 2024, before returning to roughly 2023 levels in 2025.

Annual sales value fell by 4.8% to €53 million in 2025 – the same level as in 2023. Unit sales fell 5.9% to 51.4 million in 2025, up slightly from 49.3 million in 2023. Sales volume[9] fell 6.7% to 11.0 million kg in 2025, slightly higher than the 10.8 million kg sold in 2023.

Plant-based cream sales in Germany, 2023-2025



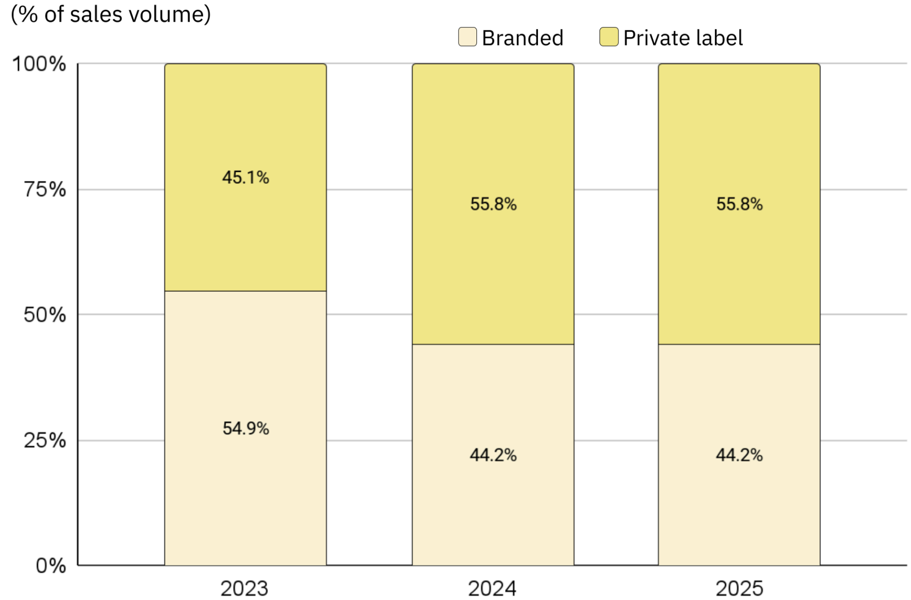
[9] Circana's dataset uses a combination of kg and litres when measuring the sales volume of cream, and it was not possible to see the proportions that were measured with each unit. To produce a combined sales volume, we have assumed that one litre is roughly equal to one kg.

Branded versus private label

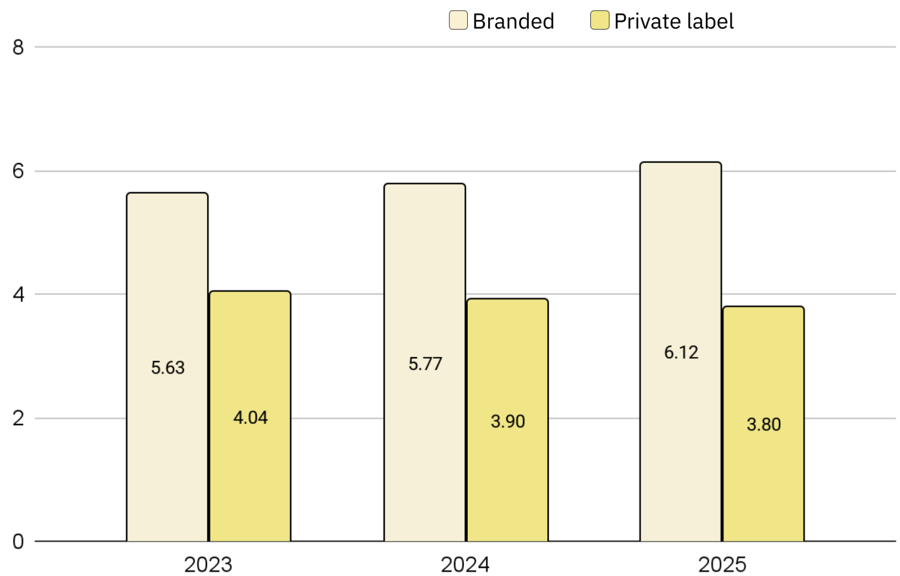
Following a jump from 45% to 56% of the market in 2024, private-label products maintained the same share of the plant-based cream market in 2025.

Private-label products were consistently more affordable per kg than branded products. Their price advantage increased over time, from 28% cheaper in 2023 to 38% cheaper in 2025.

Germany plant-based cream sales by branded or private label, 2023-2025
(% of sales volume)



Average price per kg of plant-based cream in Germany, by branded or private label, 2023-2025 (€/kg)



Product format breakdown

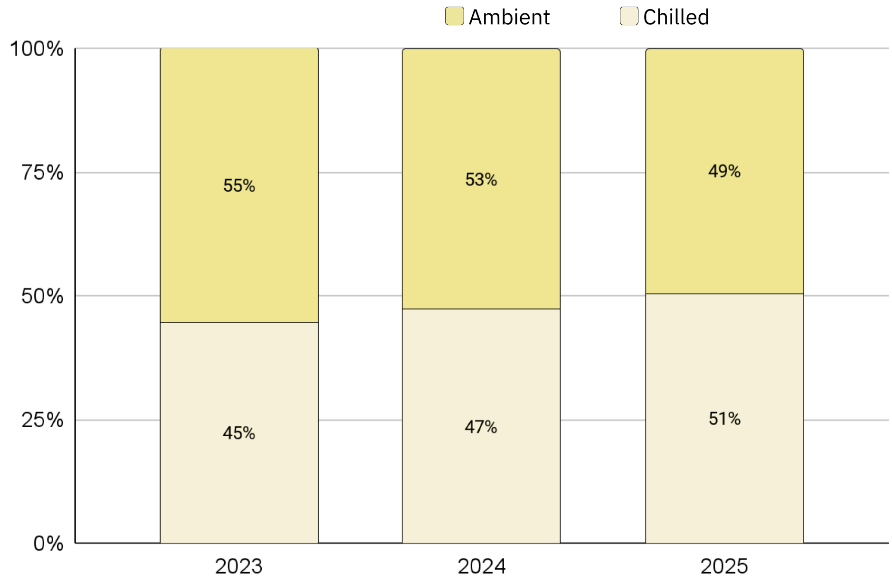
Chilled plant-based cream products continued to gain market share, rising from 45% of sales volume in 2023 to 51% in 2025.

The shift in 2025 mostly reflects the falling sales volume of ambient products, combined with steady sales volume for chilled products.

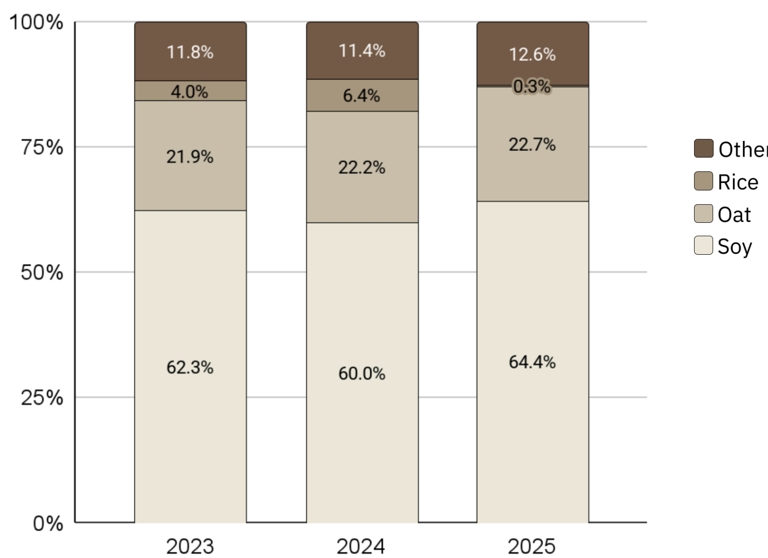
This shift does not appear to be driven by price, as ambient products were cheaper in 2025 (€4.75/kg on average) than chilled products (€4.90).

Soy cream continued to account for more than half of the market, rising to 64% of sales volume in 2025. However, in the context of falling overall sales, this reflects stable absolute sales volume for soy cream.

Germany plant-based cream sales by temperature, 2023-2025 (% of sales volume)



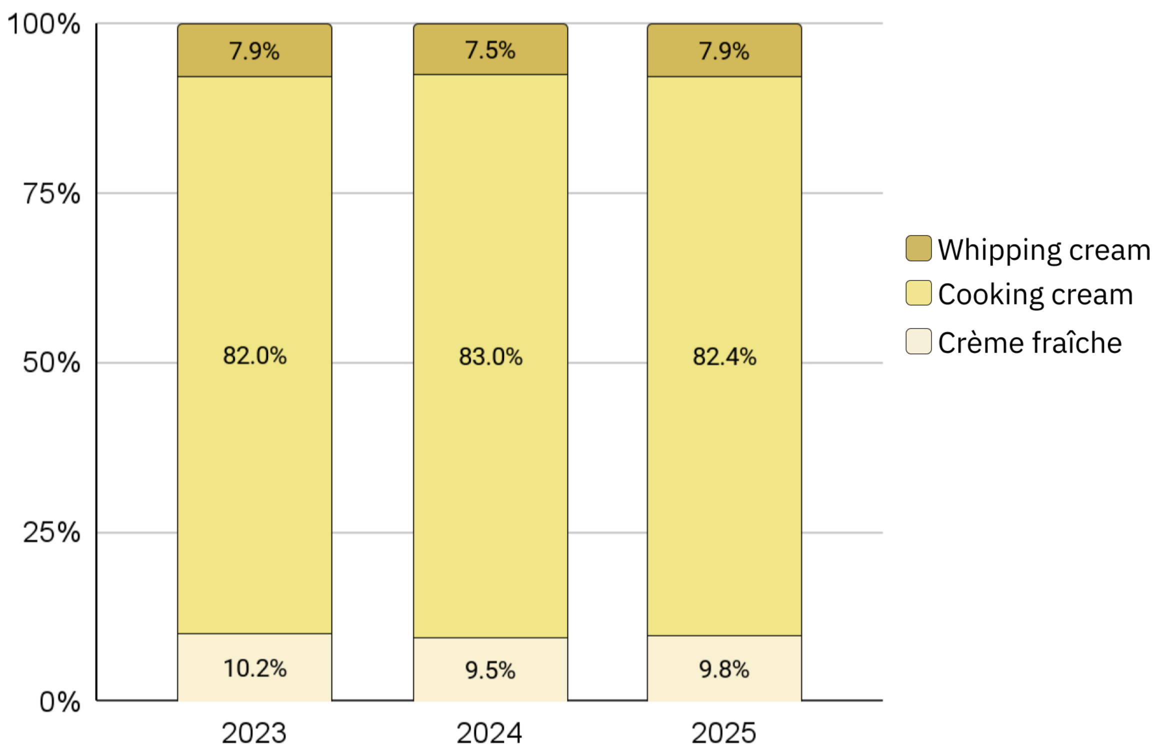
Germany plant-based cream sales by ingredient base, 2023-2025
(% of sales volume)



There was no significant shift in product type between 2023 and 2025: cooking cream continued to account for over four-fifths of sales volume, with whipping cream and crème fraîche at less than 10% each.

Cooking cream was the cheapest, at an average of €4.41/kg in 2025, compared with €7.60/kg for crème fraîche and €5.79/kg for whipping cream.

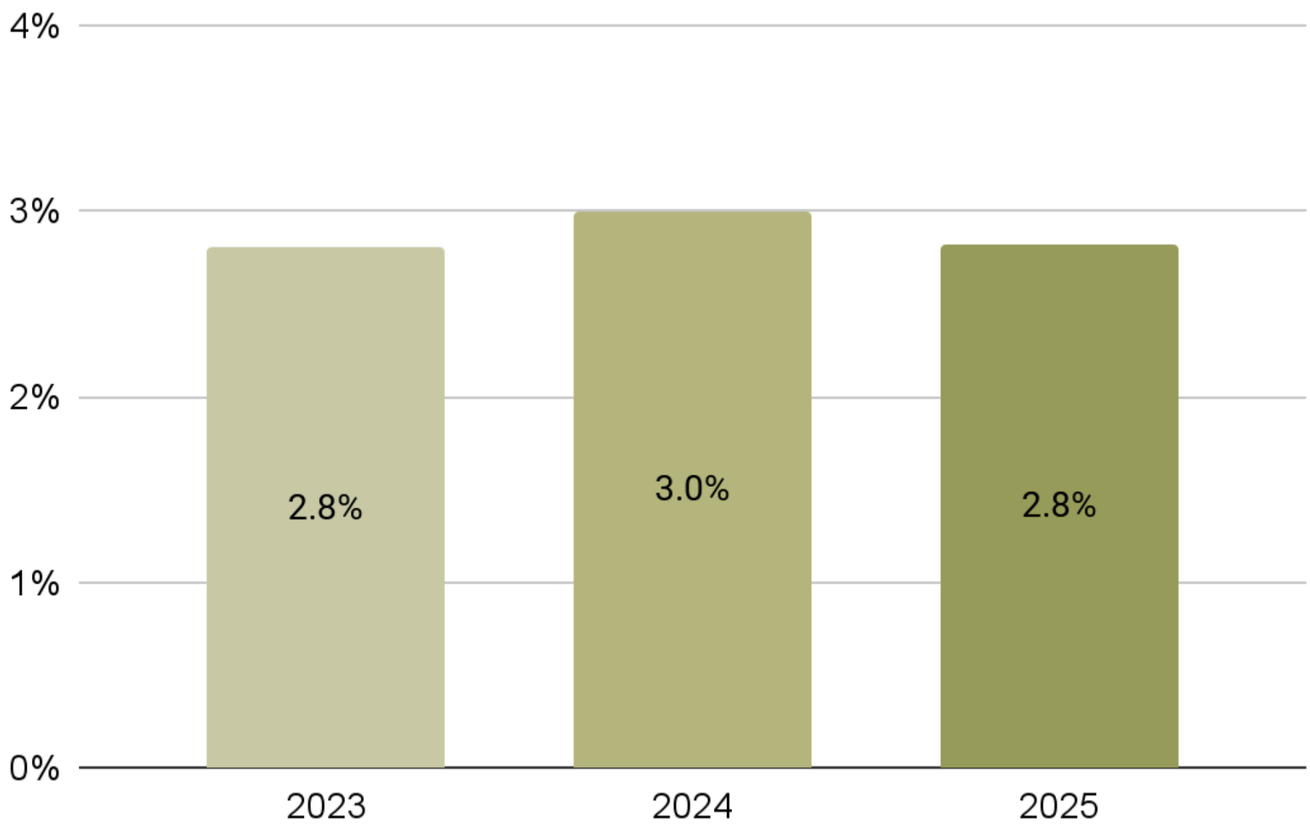
Germany plant-based cream sales by type, 2023-2025 (% of sales volume)



Market share

Animal-based cream sales volume remained steady in 2025, which meant the market share of plant-based cream (as a percentage of the overall sales volume of plant- and animal-based cream) fell slightly from 3.0% in 2024 to 2.8% in 2025.

Plant-based cream: share of Germany's total (plant- and animal-based) cream market, 2023-2025 (% of sales volume)



Price trends relative to animal equivalent

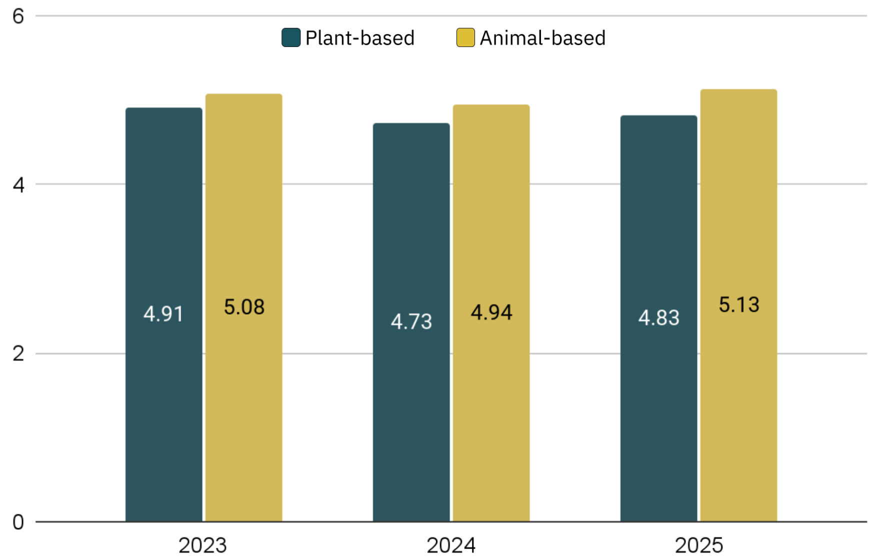
Plant-based cream, unlike most plant-based products, is more affordable than its animal-based counterpart.

In part due to rising animal-based cream prices in 2025, plant-based cream became 6% cheaper per kg, compared with 3% cheaper in 2023.

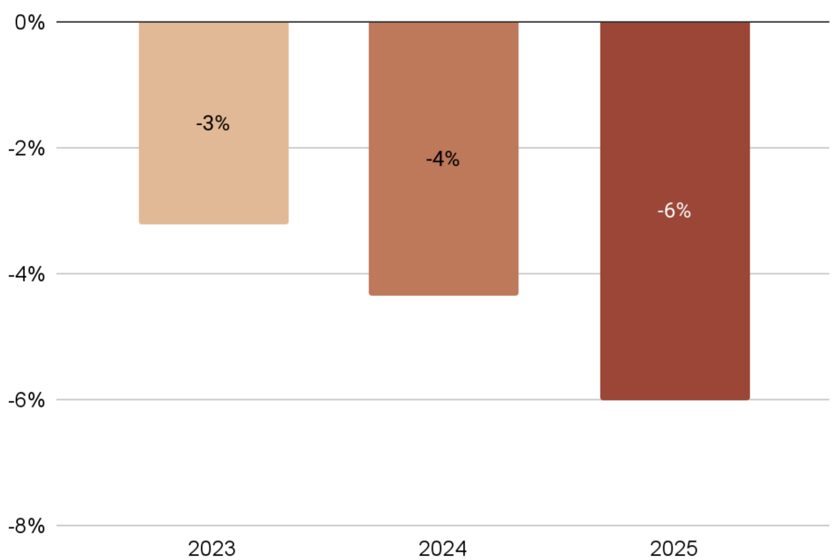
This price advantage was mainly driven by private-label products, where plant-based cream was 22% cheaper than private-label animal-based cream in 2025.

When comparing only branded products, plant-based cream was roughly the same price as animal-based cream in 2023, and 2% more expensive in 2025.

Average price per kg for plant-based and animal-based cream in Germany, 2023-2025 (€/kg)



Price difference for plant-based cream compared to animal-based cream in Germany, 2023-2025 (% difference based on €/kg)



Closing remarks

Germany's plant-based market continues to grow overall, with branded sales recovering in 2025 after levelling off in 2024, possibly linked to falling rates of inflation across the food sector as a whole.

However, the continued growth of private-label products (particularly in the plant-based milk and drinks sector), as well as the rapid growth of relatively cheap tofu, suggests that affordability remains important to many consumers.

Nevertheless, product quality must remain a top priority for manufacturers. Particularly for plant-based meat, where branded sales have remained resilient despite higher prices than for private-label products, taste, texture and ease of preparation will remain key to expanding the market.

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

The German plant-based market continues to consolidate its leading position in Europe. However, while some categories, such as milk and yoghurt, have achieved notable success, we are seeing volatility and persistently low market shares in categories where challenges remain regarding taste, texture, and cooking properties – such as seafood and cheese.

For policymakers in Germany, this holds two messages: first, they should support the further development of these products through public research funding so these sustainable options reach more consumers. Second, they should work to eliminate unfair competitive disadvantages, such as the tax disadvantage faced by plant-based milk in Germany and the absurd labelling restrictions on plant-based products in the EU.

Ivo Rzegotta,
DACH Lead at the Good Food Institute Europe

About the Good Food Institute Europe

The Good Food Institute Europe is a nonprofit 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.

Citation

Breewood H., Germany plant-based meat retail market insights 2023-2025 (2026).
GFI Europe. DOI: 10.5281/zenodo.20395998

Copyright

Contact

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

Ivo Rzegotta
DACH Lead, GFI Europe
deutschland@gfi.org