

Voluntary Report – Voluntary - Public Distribution

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Prepared By: Leif Rehder

Approved By: Kirsten Luxbacher

Report Highlights:

German food culture is changing. The number of vegans is growing, and more than half of the population wants to reduce meat consumption, considering themselves flexitarian. This makes Germany one of the most important markets for plant-based food worldwide with good opportunities for U.S. exporters. This report presents a closer look at the German market and its health-focused consumers.

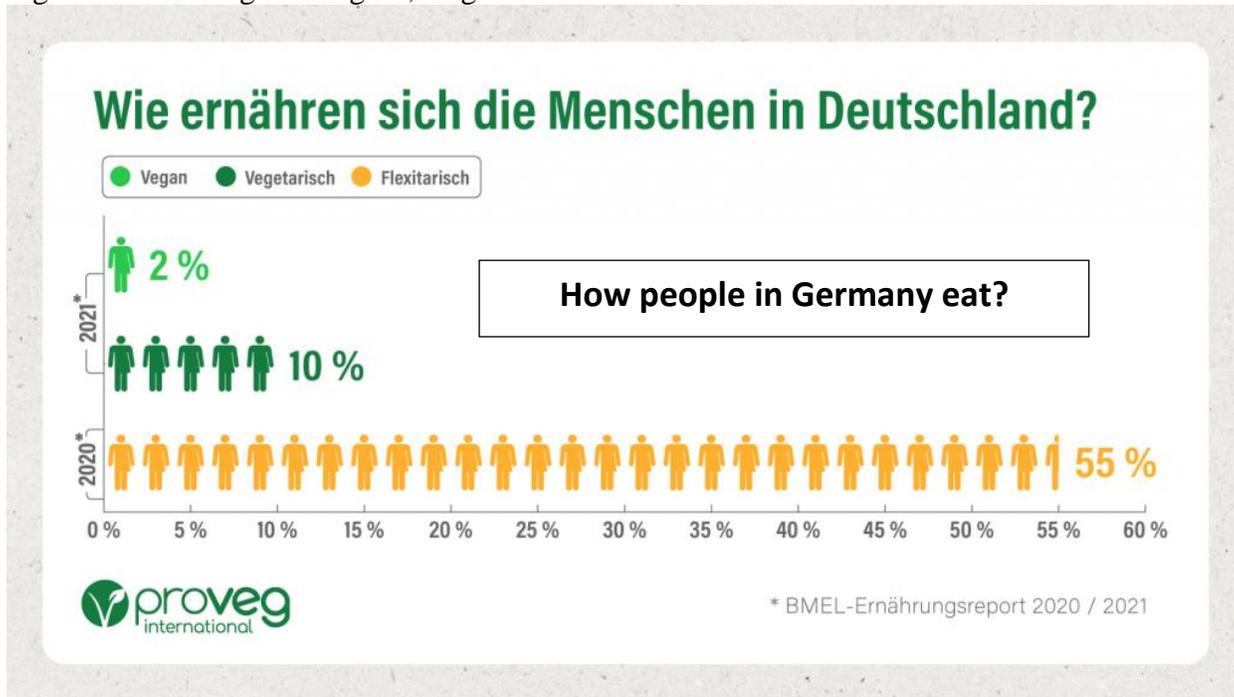
I. Executive Summary

Finding vegetarian and even vegan options is becoming easier in Germany - a land more commonly known for its sausages, schnitzel, and abundant meat-based dishes. Germany has the highest rate of vegetarianism compared to its European neighbors and the number of vegans reached over 1.5 million people in 2022. Additionally, more than half of Germans describe themselves as flexitarians - in other words, opting for less animal-based food on their plates. Food culture in Germany is changing – that much is clear. Until a few years ago, people who reduced their own meat consumption were ridiculed. Those days are gone. Today, vegans, vegetarians, and flexitarians set food trends and the market for plant-based food shows extraordinary growth rates. Berlin, as Germany's capital and most international city, has long been key to the market, but other metropolitan areas are catching up. Today, there is a lively vegan and vegetarian scene in every major city. There are good prospects for U.S. companies to export and it is recommended to check out one of Germany's first-class trade shows to get a feel for the market.

II. Flexitarians have become mainstream

In recent years, the vegan and vegetarian population in Germany has rapidly expanded. According to a [recent survey](#), nearly 8 million people followed a vegetarian diet and 1.58 million people identified themselves as vegan in 2022. In other words, nearly 10 million people are choosing to follow a diet without meat and fish or entirely without animal products. This is quite a change, since it is worth remembering that it was 0.1 million people 10 years ago who considered themselves vegan. Additionally, the number of people who are concerned with their meat consumption continues to grow: 55% of people in Germany are "part-time vegetarians" or "flexitarians". Flexitarians often reduce but don't stop eating meat.

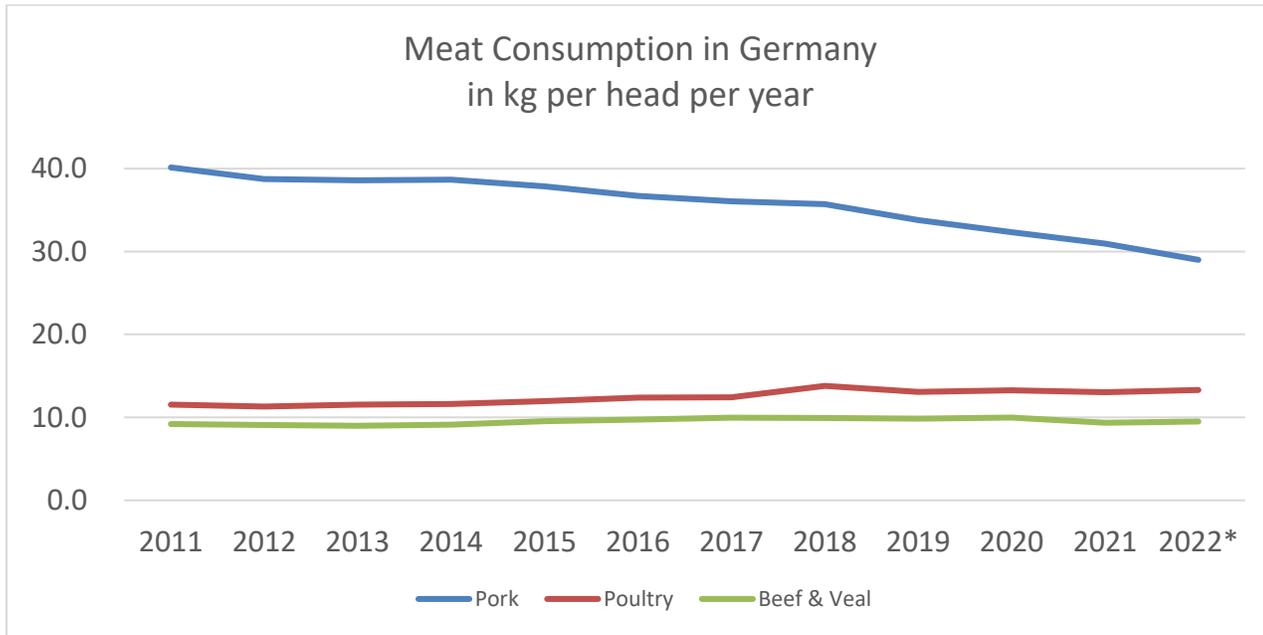
Figure 1: Percentage of Vegans, Vegetarians and Flexitarians



Source: [Proveg International](https://www.proveg.com)

The rise of flexitarians is seen as the main driver for plummeting meat consumption in Germany. In 2011, Germans ate an average 138 pounds of meat each year. That number dropped to 121 pounds in 2021. Pork is the preferred meat in Germany and its consumption dropped considerably over the last ten years while beef consumption remained stable and chicken consumption went up. Pork consumption decreased by 23% to 68 pounds, while chicken consumption increased by 13% to 29 pounds and beef consumption remained at 21 pounds. This trend runs a bit counter to trends in other countries. Citizens in low-income countries add more meat to their diet as incomes increase. In richer countries, meat consumption is usually more or less stable at a high level.

Figure 2: Pork Consumption Declines



Source: Federal Statistics Office; 2022: FAS Berlin estimate

This trend towards a more plant-based diet is not just impacting meat products but also dairy products. Per capita consumption of milk and dairy products also declined. Per capita consumption of cow's milk in 2021 was 105 pounds, down more than 4% from the previous year. For butter, milk fat, and milk fat spread products, consumption fell by over 3% to 13 pounds. In contrast, cheese consumption remained relatively stable at 56 pounds in 2021. These changes are increasingly due to higher consumption of milk substitutes, which are increasing in popularity.

A common explanation for the rise of flexitarians in Germany is that young people are driving the change and taking their parents with them. Germans are generally very eco-conscious and young people are very much aware of the environmental effects of meat consumption. For example, Germany's *Fridays for Future Movement* demands halving meat consumption by 2035. By comparison, the *Fridays for Future Movement* website in the United States does not say anything about meat. There is also political support to reduce meat consumption. In 2013, the Green party included the demand for a veggie day in its federal election campaign. It was heavily criticized and lost votes. Those days are long gone. The Greens are currently part of the governing coalition, and the country's Green Minister of Food and Agriculture incorporated a focus on plant-based diets in the Ministry's strategy. This action is supported by many young people in Germany.

The typical Vegan is young and female

While flexitarianism has become mainstream, veganism is also continuously rising. As previously mentioned, the number of practicing vegans in Germany has drastically increased. As vegans set many trends and leading activists of *Fridays for Future* and other movements are vegan, it is worth looking at some characteristics of this demographic. According to [veggieworld](http://veggieworld.com), the typical vegan in Germany is female (81%), young (60% are between 20-39 years old), well-educated (70% have a high level of

education), and has a higher income. Millennials are concerned with vegan lifestyles. There are many reasons why more and more people in Germany are opting for a meat-free diet. The most frequently stated reasons for this lifestyle are of a moral-ethical nature. Common reasons cited include love of animals, criticism of modern farming practices, animal welfare, climate and environmental protection, world hunger, and food allergies or other health problems. Much of the vegan population sees veganism as a lifestyle choice, not just a dietary one. Vegans are often making a political statement with their diet, seeing themselves as pioneers of a sustainable eating style. This is one of the main drivers for changing consumer diets and facilitating the rise of vegetarianism and veganism as well as increasing the numbers of flexitarians in Germany.

III. The Market

Germany has 84 million of the world's wealthiest consumers. It is the second largest importer and third largest exporter of consumer oriented agricultural products worldwide, and by far, the most important European market for exporters. Overall, Germany is a net importer of all major categories of food products. Grocery retail sales reached a record high of over USD 300 billion in 2021. Imports of agricultural products increased by 7.7 percent to USD 108 billion in 2021. Of that, USD 76 billion were consumer-oriented agricultural products. For more detailed information please check out the [Country Exporter Guide](#).

Over the past few years, the German food market experienced a rapid growth of vegan food development and restaurants. Plant-based alternatives can now be found in every supermarket. In 2021, every 5th food product launched in Germany was vegan. Meat alternatives, in particular, are becoming increasingly popular. Just a few years ago, plant-based meat and sausage alternatives could only be found in select health food stores. Today, they are part of the product portfolio in every supermarket. According to the [Federal Statistics Office](#), production of meat substitutes in Germany increased by over 17% to nearly 100,000 tons and valuing roughly USD 540 million. According to the newspaper [Handelsblatt](#), the market for plant-based meat substitutes has also grown strongly. Sales of meat substitutes in the German food retail sector rose by 32 percent to over USD 720 million in 2021. There is no recent data for plant-based milk sales, but they are estimated to be on a similar level. Oat milk is the most popular, followed by soy and almond milk. Please be aware that plant-based milk can only be marketed in the under other names, such as soy drink, in the European Union and Germany while the term "soy milk" is permitted in the U.S.

Germany is frontrunner in Europe

The "[Plant-based Food Sector Report](#)" of the "smart protein project" shows that Germany is the frontrunner in Europe for plant-based products. Here are some more key findings:

- Consumption of animal-based products: Milk is the most frequently consumed dairy product in Germany (35% daily), followed by cheese (24% daily) and yoghurt (21% daily). In terms of meat, poultry is the most consumed (46% at least once a week).
- Animal-based meat consumption: 51% of German consumers have reduced their meat consumption in the past year, making Germany the country with the second-highest share of meat reducers, after Romania, among the countries analyzed.

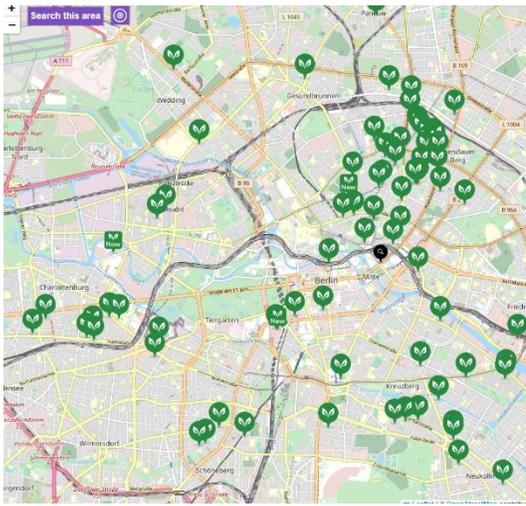
- Animal-based dairy consumption: 32% of consumers say that they will consume fewer dairy products (e.g., milk, yoghurt, cheese) in the next six months. The German market for plant-based-dairy products is among the largest and fastest growing in Europe.
- Consumption of plant-based products: looking at plant-based food, plant-based milk is the most frequently consumed product (28% at least once a week), followed by plant-based yoghurt (21% at least once a week) and plant-based poultry and beef (20% at least once a week).
- Plant-based meat consumption: compared to consumers in the other countries analyzed, German consumers are the most likely to pay more for plant-based meat than for animal-based meat. In fact, 26% are likely to pay a higher price if the plant-based product has the same taste and texture as animal-based meat. German consumers would specifically like to be able to buy plant-based minced meat, burger patties (32%), chicken breasts, and sausages (30%) in supermarkets. The plant-based meat market in Germany is the fastest growing among the European countries analyzed.
- Plant-based dairy consumption: in terms of plant-based cheese, German consumers would especially like to see plant-based cream cheese (32%), sliced cheese (32%), and plant-based mozzarella (31%) available in supermarkets. The market for plant-based dairy products in Germany is one of the largest and fastest growing in Europe. Plant-based milk is the largest segment in the German plant-based food market.
- Plant-based fish: German consumers specifically wish they could buy more plant-based fish sticks (27%) and smoked salmon (22%). Sales value for plant-based fish increased by 623% over the two periods.
- Preferred ingredients for plant-based foods: potatoes (40%), rice (37%), and lentils (33%) are Germans' favorite core ingredients in plant-based foods.

IV. Berlin is the hotspot, but other cities are catching up

The German capital is a global hotspot for vegans. Some even call it the vegan capital of the world, and with good reason. Berlin boasts not just a huge number of vegan restaurants but also many restaurants offering vegan options. Even some butchers have vegan options for sale. In today's Berlin, food is receiving unprecedented attention, bringing together tradition and innovation, humble and fine dining. The city is known as a fast-growing startup hub, attracting young professionals from all over the world. Each year, around 50,000 new inhabitants are shaping its diverse and innovative food landscape. The rich concentration of traditional regional German and international cuisines always comes up with new flavors for the booming, trendy food scene.

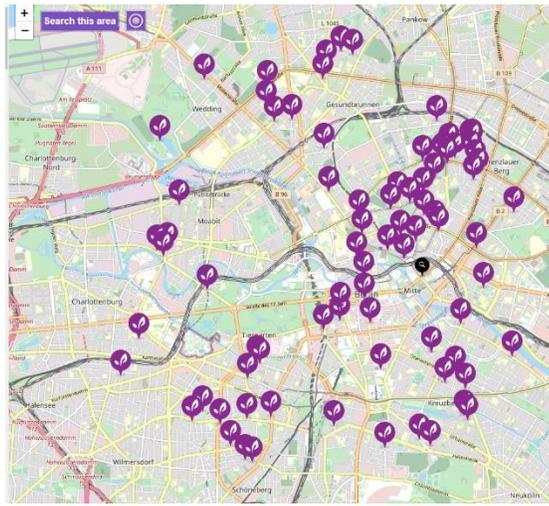
Berlin is one of Europe's most influential cities when it comes to vegetarian, vegan, and sustainable cuisine. Being one of the places in the Western hemisphere with the most vegan restaurant options, Berlin's vegetarian and vegan populations are growing steadily and many cities in the country are adopting Berlin's attitude of sustainable food consumption. According to [HappyCow](#), a vegetarian restaurant database, currently there are nearly 500 vegan restaurants in Germany, 105 of which are in the German capital. Berlin truly belongs in every conversation about global vegan and vegetarian hotspots.

Figure 3: Vegan Restaurants in Berlin



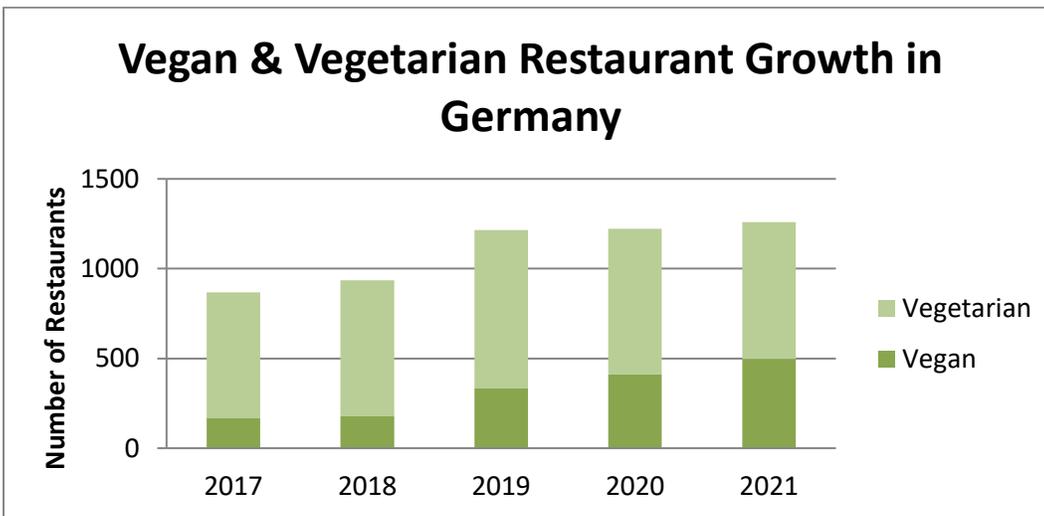
Source: HappyCow

Figure 4: Vegetarian Restaurants in Berlin



Source: HappyCow

Figure 5: Increasing Number of Vegan and Vegetarian Restaurants



Source: HappyCow

Berlin also hosts the largest [vegan summer festival](#) in Europe. In 2019, the 12th annual festival took place at Alexanderplatz. It was canceled over the last few years due to COVID-19, but the next event is scheduled to take place in August 2023. Again, there will be over 100 booths inviting visitors to purchase vegan products and learn more about the plant-based lifestyle. Additionally, there is a so-called “world’s first vegan avenue” on Schivelbeiner Straße in the north of the city - a full city block dedicated to vegan food, clothes, and restaurants.

Figure 6: Vegan Summer Festival



Source: Vegan Summer Festival

While Berlin has become the vegan hotspot in Germany, most other major cities are also part of the vegan boom. According to HappyCow, Hamburg is home to over 40 vegan-friendly restaurants, Munich and Cologne have nearly 30 each, while Frankfurt and Leipzig have about 20. Things have really changed over the past few years. Every major German city now boasts many vegan options and there is no end to this trend in sight.

This change not only affects restaurants in Germany, fast food and snack culture is undergoing a noticeable change. Classic fat and salty options are generally considered unhealthy and are constantly losing their followers. The demand for vegetarian and vegan snacks and fast-food options is growing as the stalls and snack bars adapt by adding more falafel or tofu to the menu. Nearly every international fast-food chain now offers alternative burgers and other vegetarian options to their customers in Germany.

V. Labeling

Germany has gone so far as to create legal definitions of vegan and vegetarian for food labeling. To be defined as vegan, foods must not be of animal origin or contain ingredients, processing aids, or other substances of any animal origin. Vegetarian goods have the same restrictions as vegan ones except that they may contain milk, colostrum, eggs, honey, beeswax, propolis, or wool grease. These legal definitions do not differ from the usual U.S. definitions, though they do not have the legal standing. The EU-vegetarian label has become a well-recognized, registered symbol for labelling vegan and vegetarian products and services. Please check its [website](#) for more information.

Figure 7:
Vegetarian Label



At the end of 2018, the German Food Book Commission ([Deutsche Lebensmittelbuch-Kommission](#)) published new guidelines for vegan and vegetarian food. These new principles reflect manufacturing and commercial practices as well as consumer expectations. This is particularly the case for vegan and vegetarian food products that have a sensory similarity to products of animal origin.

VI. Best Prospects

According to the Institute for Commercial Research (IFH) in Cologne, the three top-selling product groups are vegetarian-vegan meat and milk alternatives, superfoods (foods that are rich in health beneficial compounds like fiber, antioxidants etc.), and the "breakfast" category. Germany has a reputation as a meat loving country and in Berlin, that seems to be true of its vegan population. More and more eateries in the German capital - from gourmet restaurants to fast food joints – are offering vegan or vegetarian options. This is great news for U.S. vegan brands as it shows that Germany could be a strong market. However, Germany is also well known for its plant-based and meat substitutes industry.

1. Meat substitutes:

- The German food industry is reacting to customer demand for a less meat-heavy diet. The number of plant-based foods and drinks on the market has skyrocketed and continues to grow.
- Meat substitutes have become a part of the assortment in every supermarket.
- According to Statista, the United Kingdom (UK) and Germany are the [leading markets for meat substitutes](#) in Europe. Both countries were also among the top five countries, together with Italy, Sweden, and Spain, whose population were most likely to eat alternative meats.

2. Dairy product substitutes:

- Dairy product substitutes are very popular in Germany with oat milk being the most popular, followed by soy and almond milk.
- It is important to note that the European Court of Justice ruled in a case that says dairy terms, such as milk and butter, cannot be used on plant-based products that are designed as substitutes.

3. Superfoods and breakfast foods like muesli, cornflakes, and spreads made from herbs, seeds, nuts, legumes, vegetables, and vegetable oils.

- Germany is one of the world's leading markets for superfoods with a constantly growing customer demand and the second highest rate of new product launches.
- Inside the German superfood market is a growing demand for organic superfood alternatives.

4. Innovative foods and hemp-based products:

- Hemp has been known for many years, but it has only become a 'trend' in the last 5 years. In Europe the "Hemp Hype" started in Italy and from there has spread throughout the European continent. In the EU hemp products must not contain more than 0.2 percent of THC, while in the US the limit is set at 0.3 percent. Today the range of hemp products that can be purchased in-stores or online is quite wide. This includes protein powder, hemp oil, soft drinks, and snacks just to name a few.

5. Sustainability. Sustainability. Sustainability.

- German consumers are becoming more aware of sustainability and are making their purchases accordingly. Just like the clean label movement, growing demand for

sustainable products is ‘pushing’ the food industry to come up with new innovative solutions.

- According to the [Forsa Institute](#), when asked about their food values and eating habits, German respondents over the age of 14 said they regularly cooked at home, and were committed to reducing waste. Not long ago, Germany would have been called a paradise for meat-lovers, and while meat also goes through a sustainable renaissance with high standards to origin and animal welfare, more and more chefs are putting vegetarian and vegan fare high up on their menus.

VII. Competition

How are other vegetarian and vegan brands doing in Germany? Have the ones who already tried to penetrate this market managed to develop a loyal and dedicated consumer base? [Latana Brand Analytics](#) conducted a survey in 2019 to see which vegan food brands German consumers were aware of and these are the results. [Alpro](#) came out on top as 74 percent of respondents had heard of it. The Belgian brand was miles ahead of local German brands. This is unusual as Germans tend to stick to domestically produced products. Additionally, 33 percent knew [Simply V](#) and 27 percent were aware of [Veganz](#). The bottom three brands were [Made with Luve](#) (12 percent), [Oatly](#) (9 percent), and [Naturli](#) (8 percent).

When Latana Brand Analytics revisited the brands in 2021, it found out that Alpro is still the frontrunner and its parent company, Danone, plans to triple worldwide plant-based sales to USD 5 billion by 2025. Simply V has a focus on dairy alternatives and is called the undisputed market leader for plant-based cheese alternatives. Veganz has really been growing over the past years by launching 120 products internationally, clearly increasing sales and brand awareness. Oatly has further cemented its stronghold in Germany. It is one of its key markets and the brand offers a wide range of oat-based products.

Most major vegan food producers are based in the United States. However, there are several competitors in Canada. Additionally, the number of vegan producers, especially in places like Germany, is growing as the market expands rapidly. Most of the European vegan competition is based in the United Kingdom. A list of some major European vegan producers includes:

Table 1: Companies and Products

Company (Country of Origin)	Products
Alpro (Belgium)	organic and non-organic, non-GMO soy-based products
Oatly	Known for oat milk but also ice cream, cold coffee, yoghurt substitutes, cooking cream, spread, custard, and mayonnaise
Happidog (UK)	vegetarian hot dogs
Huel (UK)	liquid vegan food
Quorn (UK)	meat substitutes and pre-packaged meals
Vegetarian Butcher (the Netherlands)	meat substitutes
Innocent (UK)	juices and smoothies
Plamil Foods (UK)	soy milk, horchata, egg-free mayonnaise, chocolate, and carbo bars
K-Take it Veggie (Germany)	bread spreads, dairy and meat alternatives, and prepared foods
Made with Luvé (Germany)	vegan dairy alternatives and ice cream
SimplyV (Germany)	vegan spreads and cheeses
Veganz (Germany)	bread spreads, dairy and meat alternatives, and prepared foods

It is important to note that this is not an exhaustive list, especially considering major companies in Germany produce vegan products as only a portion of their inventory rather than the entirety. This includes but is not limited to:

- ❖ Erasco
- ❖ Kühne
- ❖ Lambertz
- ❖ Pfanner
- ❖ RUF
- ❖ Rügenwalder Mühle
- ❖ Demeter
- ❖ Gutfried

It is also important to note that large food retail chains have jumped on the bandwagon with their own brands and, for example, cover an estimated 30% of demand for meat alternatives. For more information on the food retail market in Germany, please check our [Retail Foods report](#).

VIII. Marketing opportunities

Trade shows can help U.S. companies — especially those new to the export market — expand their reach to potential customers around the globe. Germany is a trade show hub and there are a number of shows that focus on vegan or vegetarian products. A list of these shows can be found below.

[Biofach Trade Show](#)

Biofach is the world's leading trade show for organic foods. Recently, there was a special part of the exhibition titled “*Experience the World of VEGAN*” with many new vegan products being presented. *Biofach* is a great opportunity for U.S. companies to connect with importers and retailers and promote their products. *Biofach 2023* will take place on February 14-17, 2023, in Nuremburg, Germany. *Biofach* is an endorsed trade show of the U.S. Department of Agriculture.

[VeggieWorld](#)

VeggieWorld is Europe's largest consumer fair for the vegan lifestyle. Exhibitors show their latest products and services. Visitors have a chance to try, buy, and get detailed information about the entire range of vegan food and non-food-products. The conference program with interactive panels and high-level speakers conveys the latest insights and trends in the fields of vegan products and lifestyle. *VeggieWorld* will be held in Berlin on March 25-26, 2023.

[Rohvolution](#)

The *Rohvolution* is an exhibition specializing in uncooked vegetarian food with the goal to present a healthier alternative diet. The focus lies on the exchange between exhibitors and visitors. In 2023, the exhibition take place in Berlin and Speyer.

[Veggie & Frei Von](#)

The exhibition *Veggie & Frei Von* (free from) is an exhibition focused on free from and vegetarian products. The show includes cooking workshops, dietary consulting, and a huge variety of vegan, vegetarian and free from products. *Veggie & Frei Von* will take place in November 2023 in Stuttgart.

IX. Post Contact and Further Information

If you have questions or comments regarding this report, or need assistance exporting to Germany, please contact the U.S. Office of Agricultural Affairs in Berlin:

U.S. Department of Agriculture Foreign Agricultural Service
Embassy of the United States
Clayallee 170
14191 Berlin
Phone: +49(030) 83 05 – 1150
agberlin@fas.usda.gov
www.fas-europe.org

Attachments:

No Attachments.