Germany

The largest economy in the EU and the third-largest economy globally, following the U.S. and China

Population

84.5 million

Average age

45 years

Plant-based meat sales value in 2024 (EUR)

759 million

Growth over 2022

7.8%

Growth over 2023

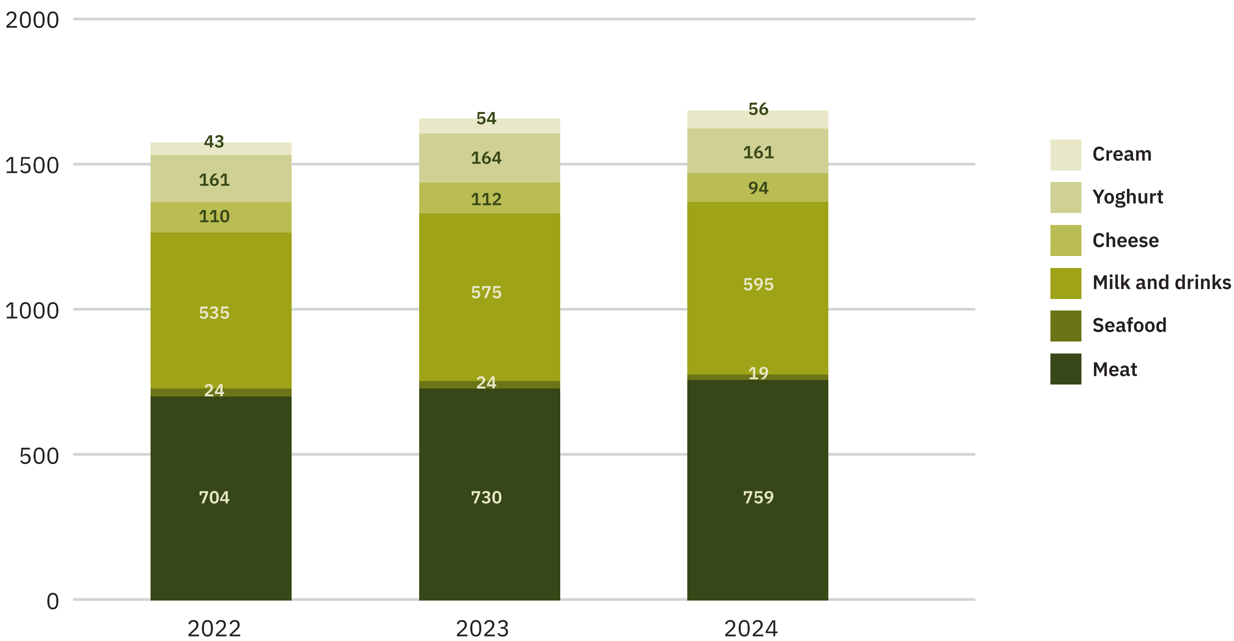
3.9%

01 Market size

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 category has recorded sales of EUR 1.7 billion in 2024 across six categories: meat, seafood, milk and drinks, cheese, yoghurt, and cream. Sales value increased by 1.5% and volume by 7% over 2023. The relatively smaller increase in sales value is driven by private-label products (those sold under the brand of a retailer with a lower price point compared to other brands).
- Plant-based meat sales recorded a sales value of EUR 759 million in 2024. This is a growth of 7.8% over 2022 and 3.9% over 2023.
- Plant-based meat makes up 4.5% of the total pre-packaged meat market, including both plant-based and animal-based products.
- The market for plant-based seafood (eg, plant-based fish) in Germany has declined significantly. Following a peak in annual sales value at EUR 24.4 million in 2023, sales value fell by 23.9% between 2023 and 2024.
- In the German market, plant-based meat options that mimic familiar 'meaty' formats are significantly more popular than tofu, tempeh, and seitan, trailing behind with EUR 75 million in sales in 2024.

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



Source: Germany plant-based food retail market insights, 2022-2024

02 Consumer profile and demand

- 1% of the German population adheres to a vegan diet, 4% maintain a vegetarian diet, and 39% identify as flexitarian, indicating occasional consumption of meat.
- 46% of German consumers express a desire to reduce their consumption of animal-derived products within the next two years, and 30% intend to increase their intake of plant-based meat alternatives over the same period.
- 47% of consumers agree that German policymakers should implement measures to expand the availability of plant-based options in public canteens, including those in schools and hospitals.
- In 2024, 32% of German households purchased plant-based meat alternatives at least once, and 15% of households purchased plant-based meat six or more times over the year, demonstrating substantial uptake. Penetration and repeat purchase rates remained stable in the last three years.
- GFI Europe's consumer study in collaboration with HarrisX also found that 38% of German consumers said they want to eat more plant-based food, and 34% want to eat less animal meat and dairy. 21% want to reduce consumption of both meat and dairy.

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

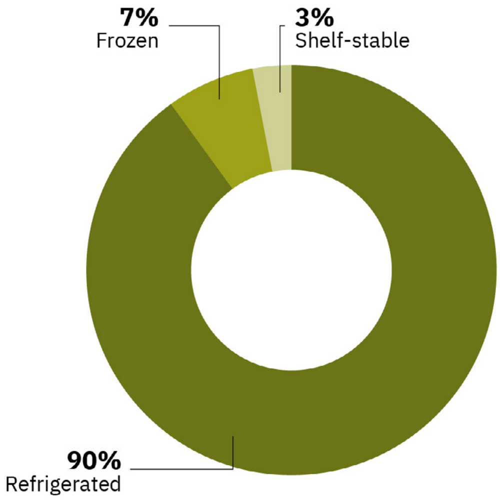
Germany	% buying at least once per year			% buying 6 or more times per year			% buying 12 or more times per year			% of sales value from discounter stores		
	2022	2023	2024	2022	2023	2024	2022	2023	2024	2022	2023	2024
Plant-based meat	32.6%	32.7%	32.2%	14.8%	15.3%	14.9%	9.8%	10.3%	9.7%	32.9%	33.3%	33.0%

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."

03 Product formats in the market

By storage condition

Contribution of plant-based meat to sales volume in 2024

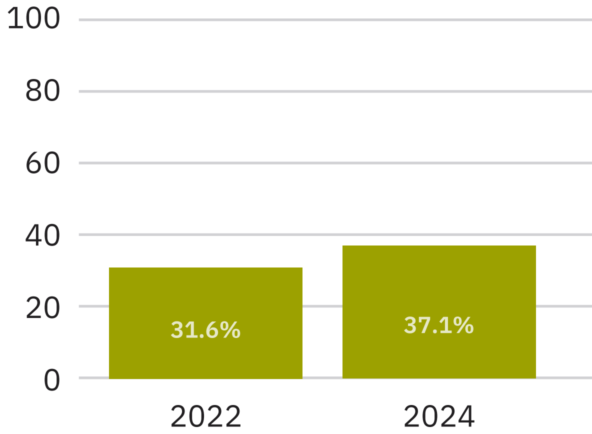


By format

- Sausage/salami is the most popular format within the plant-based meat segment.
- Plant-based seafood consumption trends indicate a preference for fish sticks and salmon formats.

Branded vs. private-labels

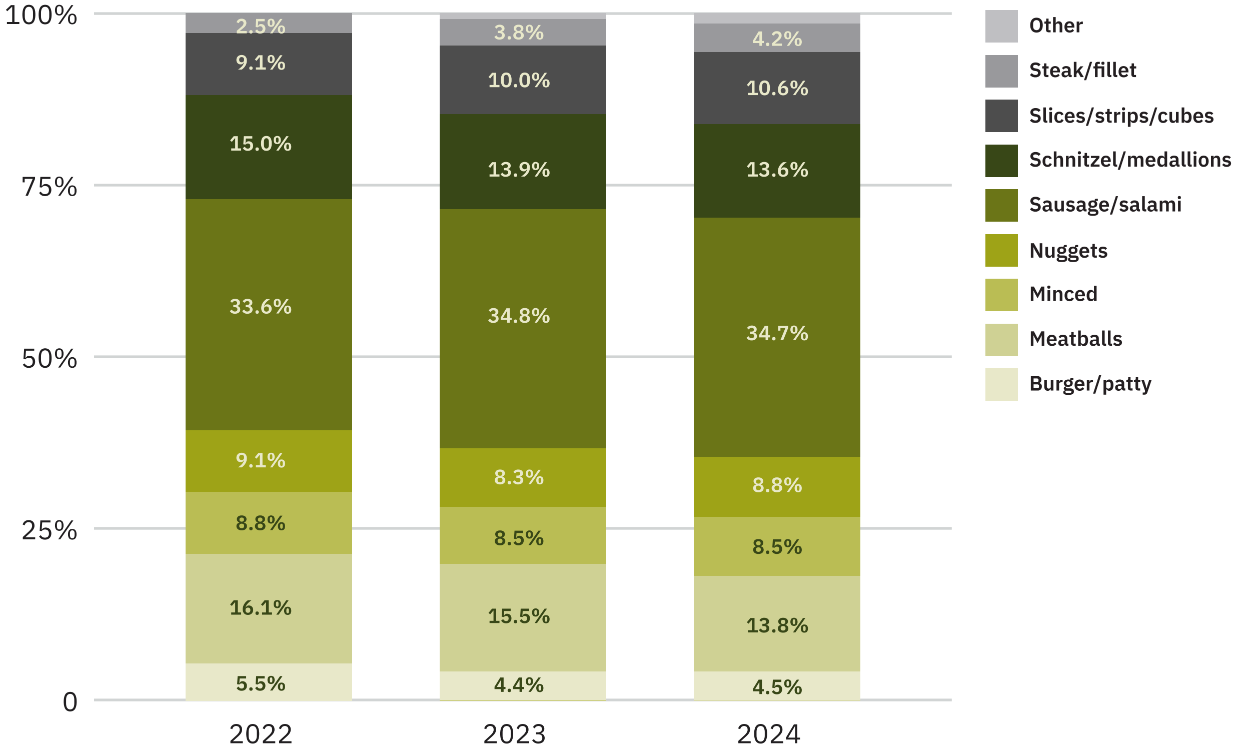
- Private-label plant-based meat products (ie, supermarket and discount store own-brand products) account for a large and growing part of Germany's plant-based market. Private-label products grew from **31.6%** of sales volume in 2022 to **37.1%** in 2024, likely driven by their affordability relative to branded products. In 2024, private-label plant-based meat products were on average **38%** cheaper per kg than branded products.



Pricing

- Plant-based meat commands a **45%** price premium over animal-derived meat, with an average price of EUR 14.1 per kilogram. Notably, this price differential has exhibited a consistent annual decline, decreasing from a **49%** premium in 2022 to a **45%** premium in 2024.

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



Source: Germany plant-based food retail market insights, 2022-2024

04 Key players in the market

- In a survey carried out in July 2024, 78% of German consumers demonstrated awareness of the **Rügenwalder Mühle** brand. This entity, formerly recognised for its meat products, now receives over 50% of its revenue from meat substitute sales, establishing itself as a consistent presence in German retail grocery outlets.
- Other brands with notable market presence include **Like Meat**, **Billie Green**, **The Vegetarian Butcher**, and **Garden Gourmet** (a Nestlé brand) in the meat sector. These are complemented by private label brands like **Vemondo** from Lidl and other brands from German retailers.

05 Key channels

Retail

- In Germany, supermarkets, followed by discount stores, are the principal retail formats for grocery purchases. Other significant channels include organic supermarkets, convenience stores, farmers' markets, online supermarkets, and specialised retailers.
- The four largest retail conglomerates, specifically **EdekaGroup, ReweGroup, SchwarzGroup,** and **AldiGroup**, account for roughly 74.5% of the total revenue, as per data from the USDA. Notable online food retailers operating in Germany include **Amazon, Getnow,** and **Picnic**.

Food service industry

- The food service industry represents a substantial market, with sales reaching USD 91.3 billion in 2023, as reported by the German Hotel and Restaurant Association (DEHOGA).
- The German food service trade relies primarily on two distribution channels: cash-and-carry wholesalers and specialised distributors.

> - Cash-and-carry wholesalers operate large retail outlets that offer a wide range of food and non-food products, catering to retailers, restaurants, and other food service providers.
> - Specialised distributors—equipped with dry and cold storage facilities and refrigerated and frozen transport—source goods from processing companies, importers, and international exporters.

- To ensure nationwide coverage, regional distributors collaborate in associations such as Intergast and Service-Bund. Several of these distributors host biannual or annual in-house food exhibitions, presenting suppliers with opportunities to display their products to potential clients. These events serve as valuable entry points for foreign suppliers into the German food service sector.
- Prominent international trade shows, including Anuga and Internorga, hold significant prestige and attract a global audience within the food industry.
- A significant portion of the institutional food service market is serviced by catering companies, with Compass, Aramark, Sodexo, Klüh, and Apetito among the leading firms in Germany, providing catering services to corporate restaurants, healthcare facilities, retirement communities, educational institutions, and universities.

06 Key brand tie-ups

Several international brands are expanding into the German/EU market through strategic partnerships with food service providers, retailers, and local manufacturers:

June 2020

Beyond Meat, entered into a co-manufacturing agreement with **Zandbergen**. The state-of-the-art facility owned and operated by Zandbergen will produce the Beyond Burger® and Beyond Sausage® and is intended to allow for more efficient distribution of Beyond Meat's products across Europe, the Middle East and Africa (EMEA). Beyond meat also entered into an agreement with **REWE** stores (1600 stores), one of the leading retailers in the country from 2023.

August 2022

Burger King Germany announced a collaboration with **The Vegetarian Butcher** in August 2022, which saw its plant-based options more than double. The chain now offers a meat-free version of almost every item on the menu. In August 2024, a company employee said that one in five Whoppers sold in Germany was plant-based.

June 2024

Redefine Meat, founded in Israel, launched its entire chilled range at Germany's largest online vegan retailer, **Velivery**, which also delivers to Austria. They have already seen a highly successful food service launch in the DACH region (Germany, Austria, and Switzerland), with its products now available at over 700 restaurants, hotels, and more through **Giraudi Meats**.

▶ April 2025

The **Vegan Food Group (VFG)** is introducing **JUST EGG** to the UK and EU markets for the first time, having secured exclusive rights for its manufacturing and distribution across Europe .To launch the joint venture, VFG is initially investing £5 million to establish a fully automated production line for plant-based egg alternatives at its production site in Lüneburg, Lower Saxony. This will make it one of the largest facilities for plant-based products in Europe

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▶ Nov 2025

TiNDLE Foods, a company specializing in plant-based meat, has shifted its business strategy. The new focus is on private-label products within the European market, following the divestment of its operations in the United States.

07 Key distributors, manufacturers, and retailers

Zandbergen, a production partner based in the Netherlands, serves as the primary manufacturer of Beyond Meat products for the European market, including Germany.

Giraudi Meats, renowned for its exclusive, high-end meat offerings to Europe's food services sector, maintains a presence in over 30 countries, collaborating with more than 300 meat distributors and wholesalers. They manage pan-European sales, marketing, and distribution for their partner brands.

Genuport Trade GmbH, a leading importer and distributor of foods in Germany, sources well-established food brands from over 20 countries and manages their marketing and distribution within Germany.

GV Food Union is a food service company that caters to the catering, communal catering, and hotel industries. Their core objective is to foster and enhance collaboration between wholesalers and suppliers. Additionally, GV Food Union GmbH functions as a significant marketing partner for manufacturers.

Delimondo Handels GmbH & Co. KG (formerly Horace M. Ostwald e.K.) has specialized in importing select gourmet foods since 1959, serving clientele that includes leading five-star hotels, catering services, fine food stores, and other establishments.

BOS Food is a company that provides upscale and Michelin-starred restaurants with raw materials.

Intergast is a network of 40 medium-sized retailers operating wholesale markets across Germany, Austria, Switzerland, and Luxembourg at over 150 locations.

Servicebund is a group of wholesalers specializing in distributing a diverse range of food products. With numerous locations throughout Germany, Servicebund provides support to chefs at both national and local levels.

REWE, with over 3,800 stores, is a prominent food retail company in Germany.

The Schwarz Group, a multinational retail entity, operates stores in Germany under the Lidl and Kaufland brands, holding the distinction of being the largest retailer in Europe and the fourth-largest worldwide.

Aldi, a supermarket chain with a presence in Germany, most of the EU, Australia, the UK, and the U.S., has approximately 4,100 stores in Germany.

The EDEKA group is the largest German supermarket corporation, encompassing 4,100 stores that include supermarkets, hypermarkets, discount stores, and cash-and-carry stores. Their product range includes fruits, vegetables, meat, sausage, cheese, delicatessen items, fish products, juices, and frozen foods.

08 Regulatory overview

Legislative authority / Regulatory body

Several national and EU regulations regarding the import of food apply to Germany.

All EU member states accept the 'Community acquis,' i.e., the entire body of EU laws and obligations associated with the treaties and international agreements to which the EU is a party. EU Member states share a customs union, a single market where goods can move freely, a common trade policy, and a common agricultural and fisheries policy.

Three institutions are involved in developing policies and passing legislation that applies throughout the EU: the European Commission (EC), the Council of the European Union, and the European Parliament.

The European Food Safety Authority (EFSA) is responsible for providing scientific advice to legislators on matters related to food safety.

The Federal Ministry of Food and Agriculture and the Federal Office of Consumer Protection and Food Safety oversee the enforcement of food safety regulations in Germany.

Food law	The General Food Law Regulation 178/2002
Labelling regulation	The Food Information to Consumers (FIC) Regulation 1169/2011 is the primary legislation for food labelling in the EU. It applies to all pre-packaged food and drink products marketed in the EU, including those imported from outside the EU. However, the FIC regulation allows the 27 EU member states to deviate from European rules. To assist food business operators in complying with the EU's food labelling rules, the European Commission released a Notice on Questions and Answers on the Application of Regulation 1169/2011 on the Provision of Food Information to Consumers.
Plant-based meat and dairy products	Under current EU law, specific terms, including 'milk' and 'yoghurt,' cannot be used for plant-based dairy, even if they are accompanied by qualifiers such as 'plant-based' or 'vegan.' This decision was confirmed in a court ruling from 2017. As of June 2025, the EC has put forward a proposal with a list of 29 'meat' terms to ban their use in the marketing of plant-based alternatives. The EU policymakers have entered into a provisional agreement to restrict the use of 31 animal-associated terms for plant-based products. These include species names such as 'chicken', 'beef', and 'pork', as well as meat-cut terminology such as 'breast', 'thigh', and 'drumstick'. Further specific rules may be applicable at the EU-member state level. The designations customary in each member state must be determined on a case-by-case basis.

Fermentation-derived and cultivated meat	Classified as novel food, novel fermentation-derived proteins and cultivated meat require pre-market authorisation per the Novel Foods Regulation (EU) 2015/2283. EFSA has also released 'Guidance on the scientific requirements for an application for authorisation of a novel food in the context of Regulation (EU)2015/2283.'
Genetically Modified Organism (GMO) regulation	Alternative protein products containing or consisting of a Genetically Modified Organism (GMO) are subject to GMO Regulation 1829/2003. Foods produced from a GMO may only be placed on the EU market after prior authorisation by the EC. A GMO authorisation has an initial validity of 10 years and is renewable. GMO-specific monitoring and labelling obligations apply.
Import-export portal or services (if any)	The EU has launched a new portal, Access2Markets, for exporters and importers to find detailed information on tariffs, rules of origin, product requirements, customs procedures and formalities, VAT/ excise duties/sales taxes, trade barriers, and trade statistics.
Registration of business	Economic Operators Registration and Identification (EORI) number is a unique identifier assigned by EU customs authorities to businesses and individuals involved in import or export activities within the EU, essential for customs declarations and interactions with customs officials.
Tariff benefits	Since EU has adopted a 'Generalised System of Preferences' (GSP) for goods originating in India (India qualifies for the 'GSP Standard' category), there is a concessional rate of 5.5% (+Agricultural Component (EA)) applicable on goods being exported from India under the HSN. For the benefit to be available, various compliances (including certifications/ declarations) will be necessary to prove the origin of the product is from India under the Rules of Origin as applicable to GSP. The standard tariff is 9% + EA.