

# Germany plant-based food retail market insights

2020-2022



# Executive Summary

Retail sales data from NielsenIQ covering 13 European countries shows that sales of plant-based foods have grown 6% in 2022 – and 21% since 2020 – to reach €5.8 billion.

The global shift towards plant-based diets has sparked a revolution in the food industry, with major food manufacturers and retailers embracing the change. In Europe, plant-based food retail sales have surged in recent years as new products and innovations have come to market, enabling more consumers to purchase next-generation plant-based meat, seafood, eggs and dairy that are competitive with animal products on taste, price and convenience.

## Plant-based foods in Europe are a €5.8 billion market.

The Good Food Institute Europe analysed NielsenIQ plant-based data for 13 European countries – Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, and the UK – to calculate the size and growth of the plant-based food retail market from 2020 to 2022.

<b>€5.8 billion</b>	<b>+6%</b>	<b>+4%</b>	<b>21%</b>
The retail market for plant-based foods is worth €5.8 billion, up from €4.8 billion in 2020.	The value of plant-based food sales grew by 6% between 2021 and 2022.	Plant-based food unit sales grew by 4% between 2021 and 2022.	Plant-based food euro sales and unit sales grew by 21% between 2020 and 2022.

To contextualise the sales performance of plant-based categories in 2022, it is important to note the unique macroeconomic environment that was present due to the ongoing war in Ukraine, global trade tensions, and inflation. While the growth of the plant-based food retail market decelerated in 2022 compared to 2021, both euro and unit sales continued to grow, demonstrating strong demand from consumers for these products despite these challenges.

## Overview of Europe-wide plant-based category sales summary, 2022

	2022 euro sales	2021-2022 sales growth	2020-2022 sales growth	2022 unit sales	2021-2022 unit sales growth	2020-2022 unit sales growth
Milk	€2.2 B	7%	19%	1.3 B	6%	20%
Meat	€2.0 B	3%	19%	846 M	1%	21%
Yoghurt	€515 M	-0.4%	8%	255 M	-3%	10%
Spreads	€247 M	13%	40%	140 M	4%	26%
Meals	€181 M	20%	79%	72 M	14%	71%
Ice cream	€174 M	8%	14%	57 M	8%	15%
Cheese	€165 M	4%	56%	61 M	4%	62%
Cream	€139 M	7%	7%	109 M	0%	1%
Dessert	€88 M	6%	27%	58 M	5%	40%
Seafood	€43 M	60%	326%	14 M	67%	343%
<b>Total</b>	<b>€5.8 B</b>	<b>6%</b>	<b>21%</b>	<b>2.9 B</b>	<b>4%</b>	<b>21%</b>

### Plant-based foods in Germany are a €1.91 billion market.

The German plant-based food retail market is the largest market in Europe, and sales continue to grow – increasing by 42% between 2020 and 2022 to €1.91 billion.

Plant-based meat is Germany's most developed category and experienced steady growth between 2020 and 2022, and the value of plant-based milk sales continued to increase, growing 43% over the same period. Almost every plant-based category grew in 2022, with the fastest-growing categories being plant-based seafood, meals, cream and dessert.

In Germany, the plant-based sector was significantly less affected by inflation and rising prices in 2022: average prices per unit for plant-based meat, milk and cheese decreased, while average prices for their animal-based counterparts increased.

**Addendum: In April 2023, we discovered some errors on the part of our data partner for the UK plant-based cheese, yoghurt, and dessert categories and the Poland plant-based cheese category. In this report, the executive summary, overall plant-based food country comparison charts, plant-based cheese country comparison charts, and plant-based yoghurt country comparison charts have been updated with the correct sales figures.**

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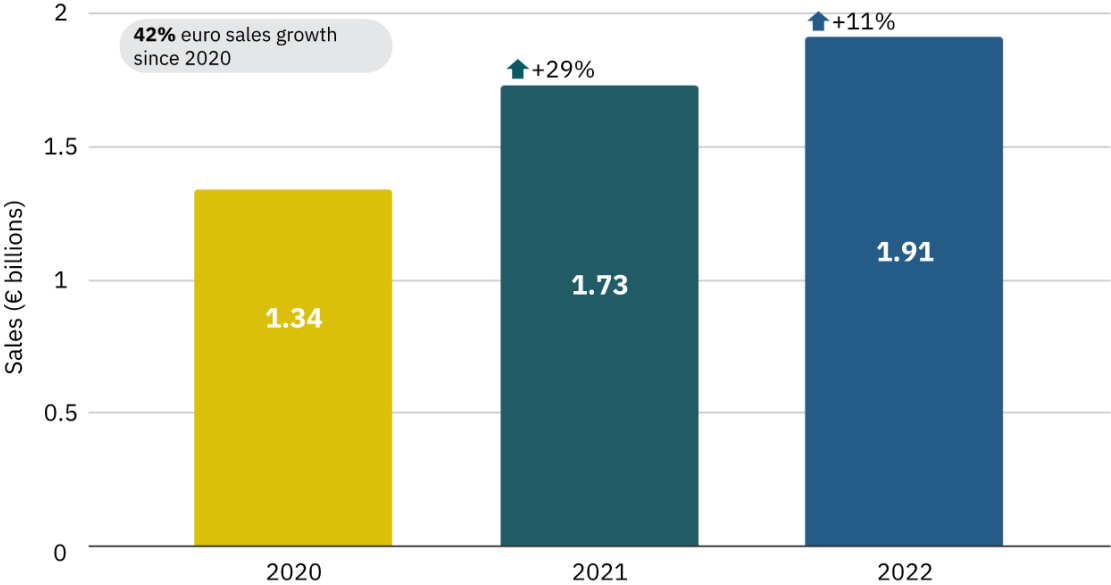
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# Overall plant-based food market

Plant-based food sales in Germany grew by 11% in 2022 to reach €1.91 billion.

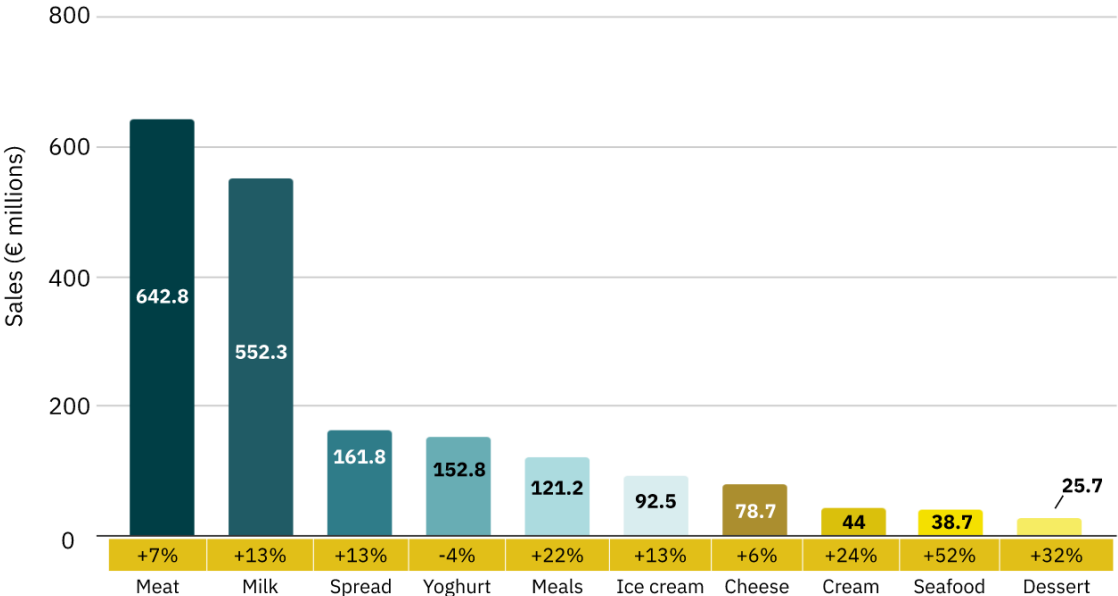
## Total plant-based food sales (in € billions), German retail, 2020-2022



## Categories

Plant-based categories are in various stages of development.











## Germany plant-based foods sales by category (in € millions), 2022



## Key insights:

- **Plant-based meat is the most developed of all plant-based categories.** Plant-based meat sales were €642.8 million in 2022, and the category continues to experience consistent growth.
- **Plant-based milk sales continue to increase, totalling €552.3 million in 2022,** and growing by 43% between 2020 and 2022.
- **Almost every category grew in 2022.** The fastest-growing categories were plant-based seafood, meals, cream and dessert.

## Plant-based category sales summary, 2022

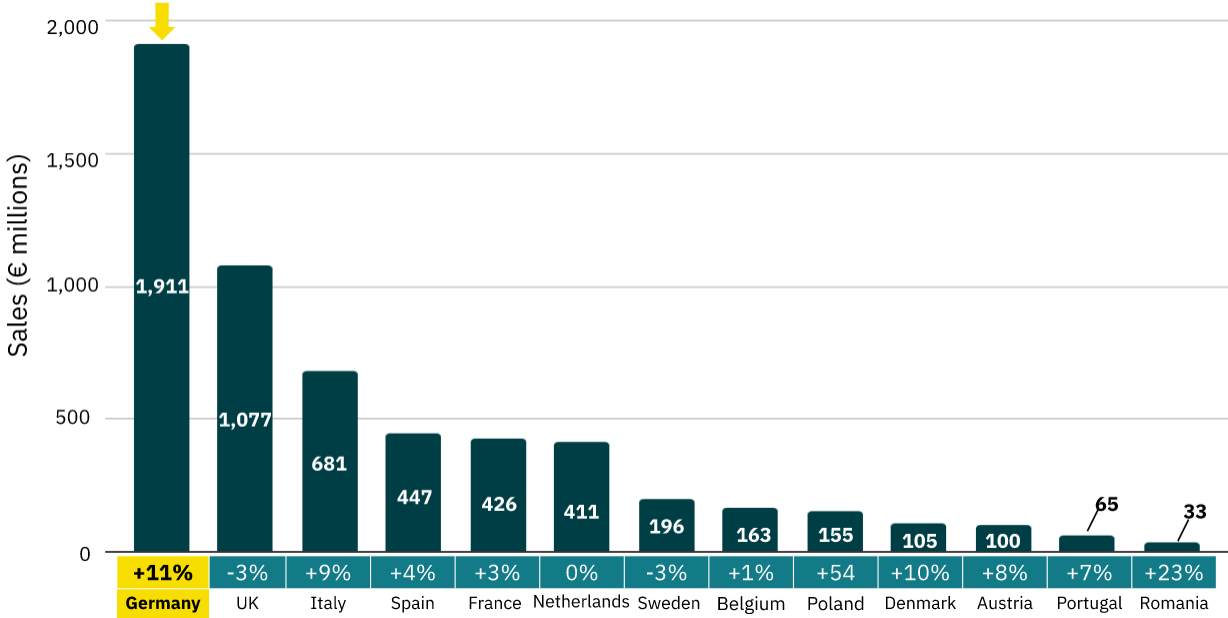
		2022 euro sales	2021-2022 euro sales growth	2020-2022 euro sales growth	2022 unit sales	2021-2022 unit sales growth	2020-2022 unit sales growth
Meat		€642.8 M	7%	40%	298.1 M	6%	41%
Milk		€552.3 M	13%	43%	356.9 M	14%	48%
Spreads		€161.8 M	13%	27%	101.4 M	9%	25%
Yoghurt		€152.8 M	-4%	9%	94.8 M	-5%	12%
Meals		€121.2 M	22%	91%	45.9 M	14%	81%
Ice cream		€92.5 M	13%	15%	31.1 M	17%	20%
Cheese		€78.7 M	6%	94%	30.8 M	12%	108%
Cream		€44.0 M	24%	72%	41.0 M	13%	58%
Seafood		€38.7 M	52%	310%	13.2 M	61%	336%
Dessert		€25.7 M	32%	154%	18.9 M	31%	227%
<b>Total</b>		<b>€1.91 B</b>	<b>11%</b>	<b>42%</b>	<b>1.03 B</b>	<b>10%</b>	<b>43%</b>

Icons: [Flaticon.com](https://flaticon.com)

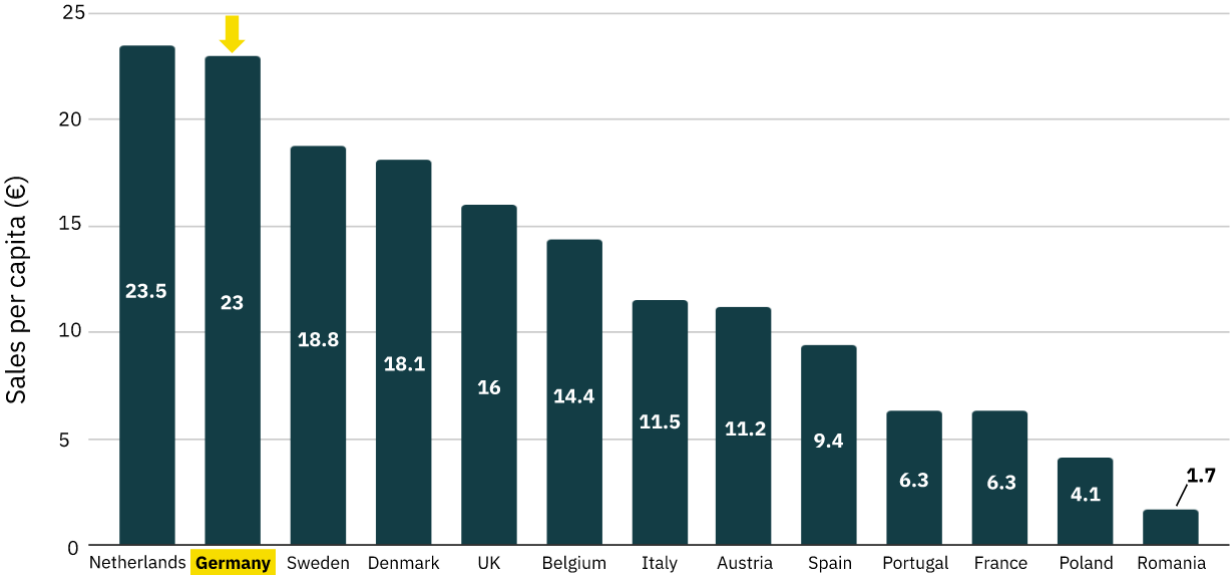
## Country comparison

Germany has the highest plant-based food euro sales in Europe and the second highest average plant-based food euro spend per capita.

Europe-wide plant-based food sales by country (in € millions), 2022

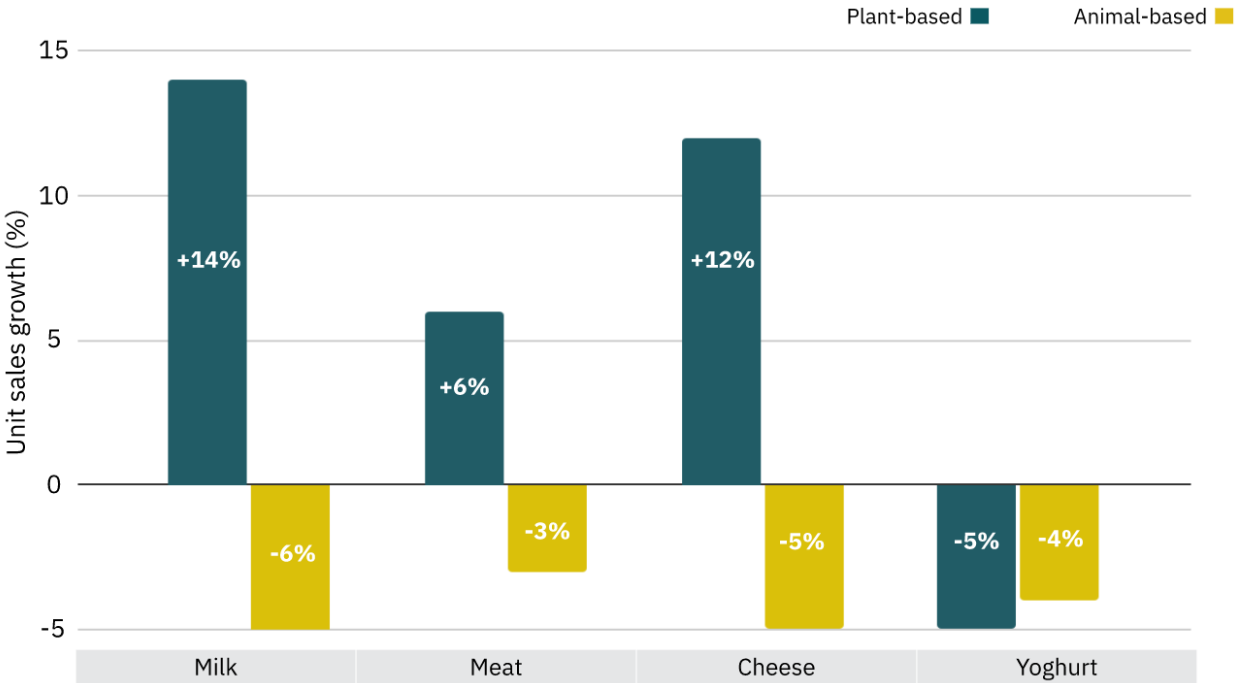


Europe-wide average plant-based food spend per country per capita (in euros), 2022



# Comparison to animal-based foods

## Plant-based vs animal-based category unit sales growth, 2022

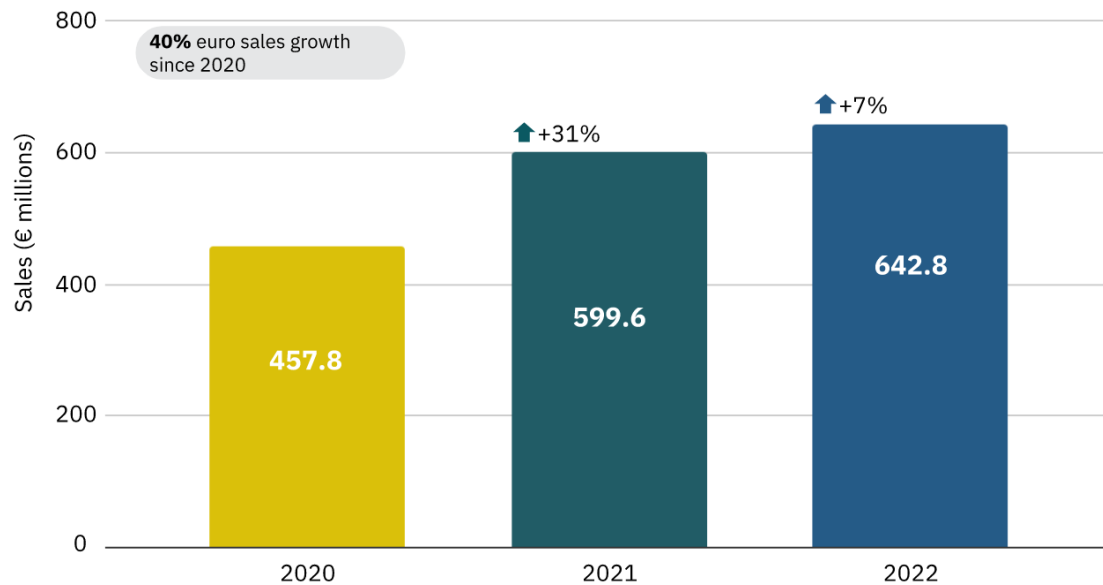


To compare the growth of plant-based versus animal-based categories, we compared unit sales (instead of sales by value) as it provides a more direct comparison. In 2022, unit sales growth of the plant-based milk, meat and cheese categories outpaced that of animal-based categories.



# Plant-based meat<sup>1</sup>

## Germany plant-based meat sales (in € millions), 2020-2022



### Key insights:

- The value of plant-based meat sales grew by 40% between 2020 and 2022, while total unit sales for plant-based meat went up by 41%.
- In comparison, pre-packaged conventional meat unit sales decreased by 13% between 2020 and 2022.
- In terms of average price per unit in 2022, the plant-based meat category has been less impacted by inflation and price increases. Plant-based meat prices increased by 1%, whereas pre-packaged conventional meat prices increased by 15%.

### Segment insights:

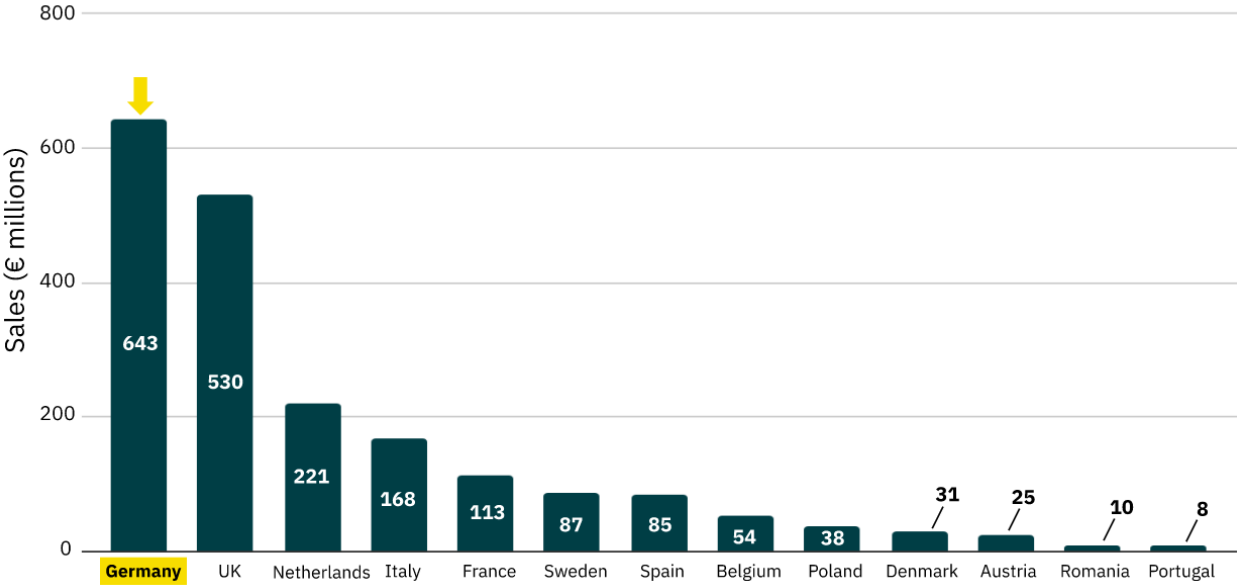
- Refrigerated plant-based meat makes up the majority of the category by sales value in 2022, representing 95% of total plant-based meat sales, whereas frozen plant-based meat makes up 5%.
- The most popular plant-based meat formats are processed meat products (e.g. burgers, mince, nuggets), which make up 60% of sales by value, followed by cold cuts (22%) and sausage (13%).

<sup>1</sup> The plant-based meat category includes both analogues (products that mimic the appearance and taste of animal-based meat) and non-analogues (e.g. vegetable-based patties). It does not include tofu/seitan.

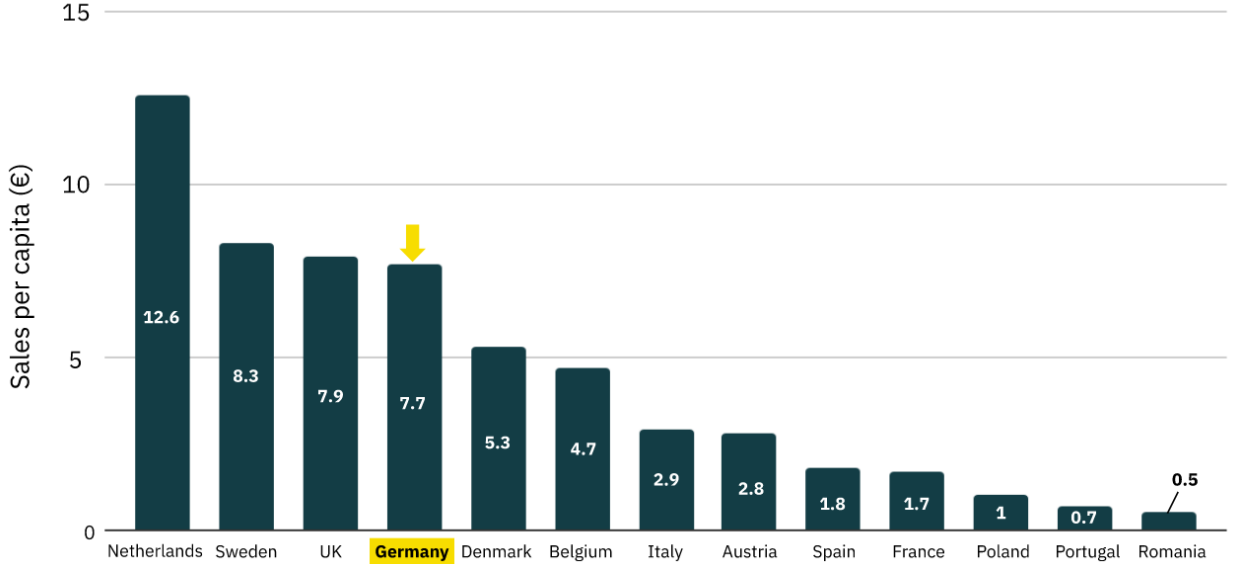
## Country comparison

Germany has the highest plant-based meat sales value in Europe. However, in terms of average plant-based meat spend per capita, Germany ranks fourth.

### Europe-wide plant-based meat sales by country (in € millions), 2022

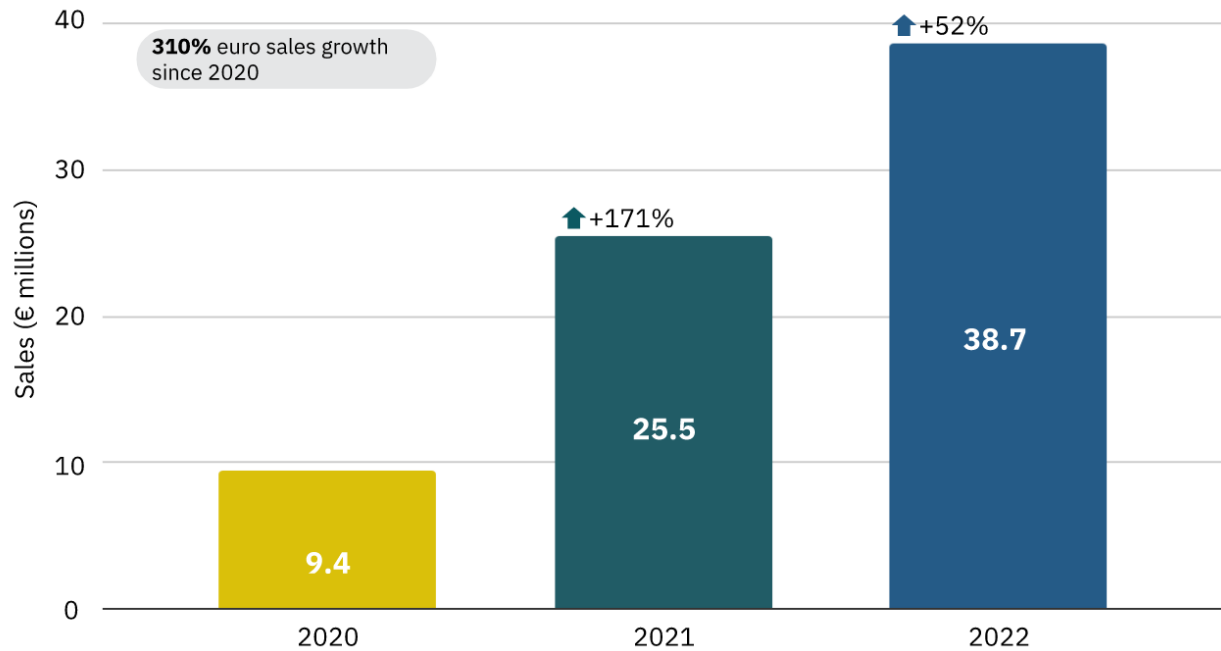


### Europe-wide average plant-based meat spend per country per capita (in euros), 2022



# Plant-based seafood

## Plant-based seafood sales (in € millions), 2020-2022

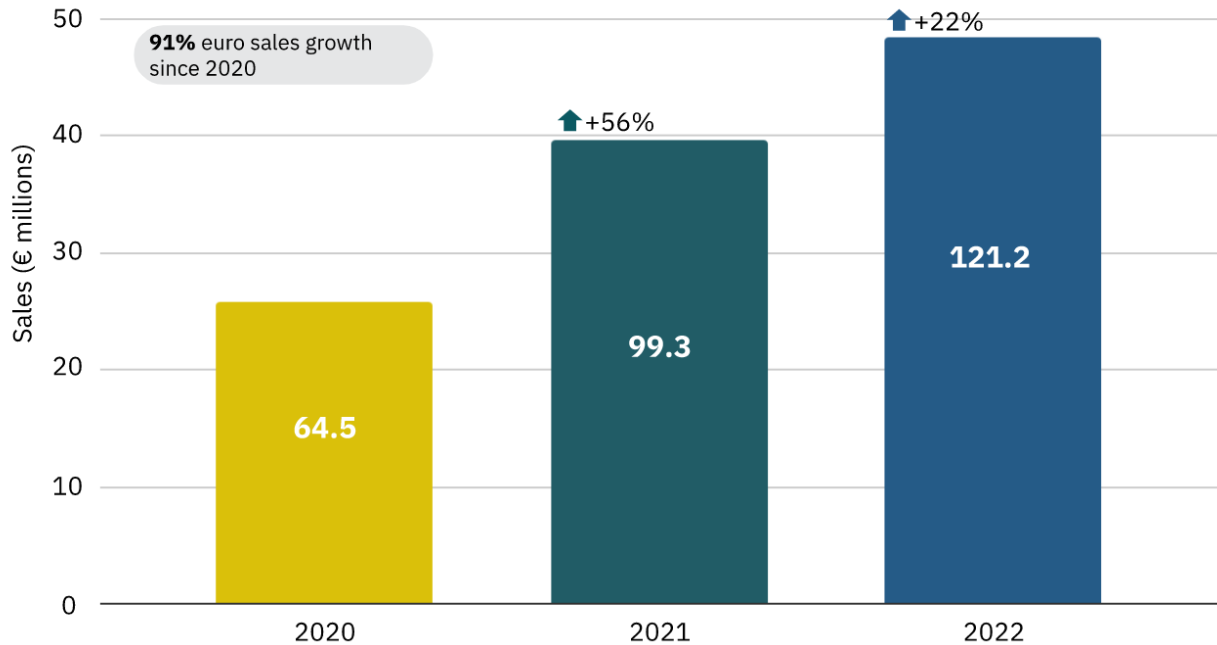


### Key insights:

- The value of plant-based seafood sales grew 310% between 2020 and 2022.
- Plant-based seafood unit sales grew 336% between 2020 and 2022.
- The average price per plant-based seafood unit in 2022 decreased by 6%.

## Plant-based meals<sup>2</sup>

### Plant-based meal sales (in € millions), 2020-2022



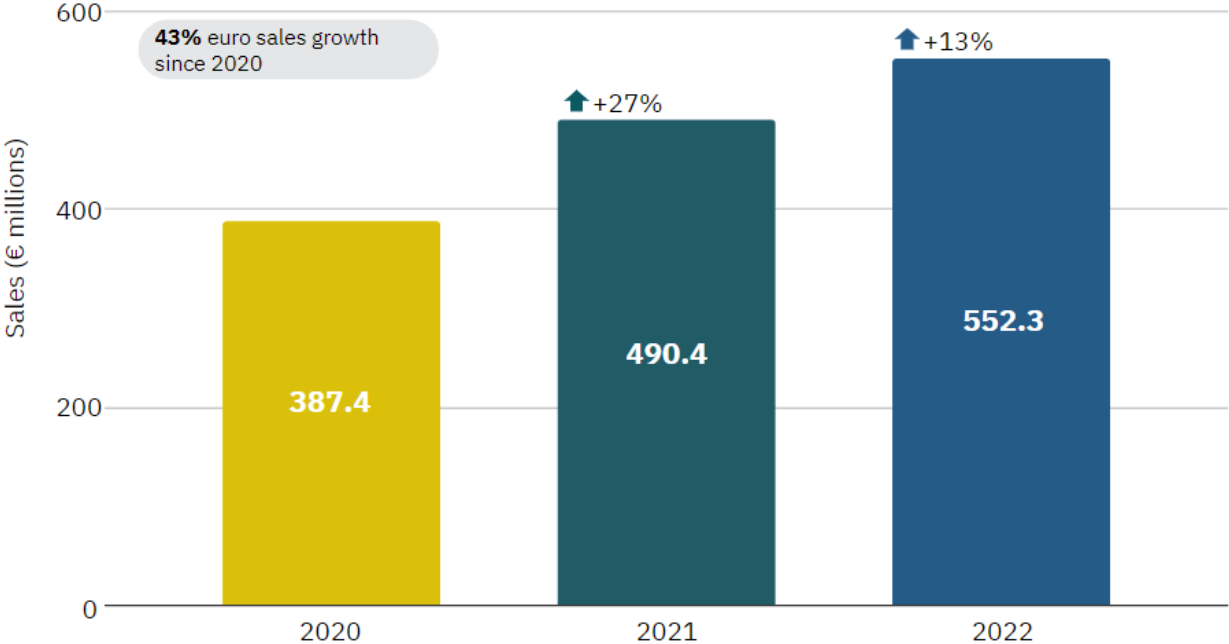
#### Key insights:

- The value of plant-based meal sales increased by 91% between 2020 and 2022.
- Plant-based meal unit sales increased by 81% between 2020 and 2022.
- The average price per plant-based meal unit in 2022 increased by 7%.

<sup>2</sup> The plant-based meal category covers refrigerated, shelf-stable, and frozen prepared meals including sandwiches, lasagnas, and vegetable dishes.

# Plant-based milk

Plant-based milk sales (in € millions), 2020-2022



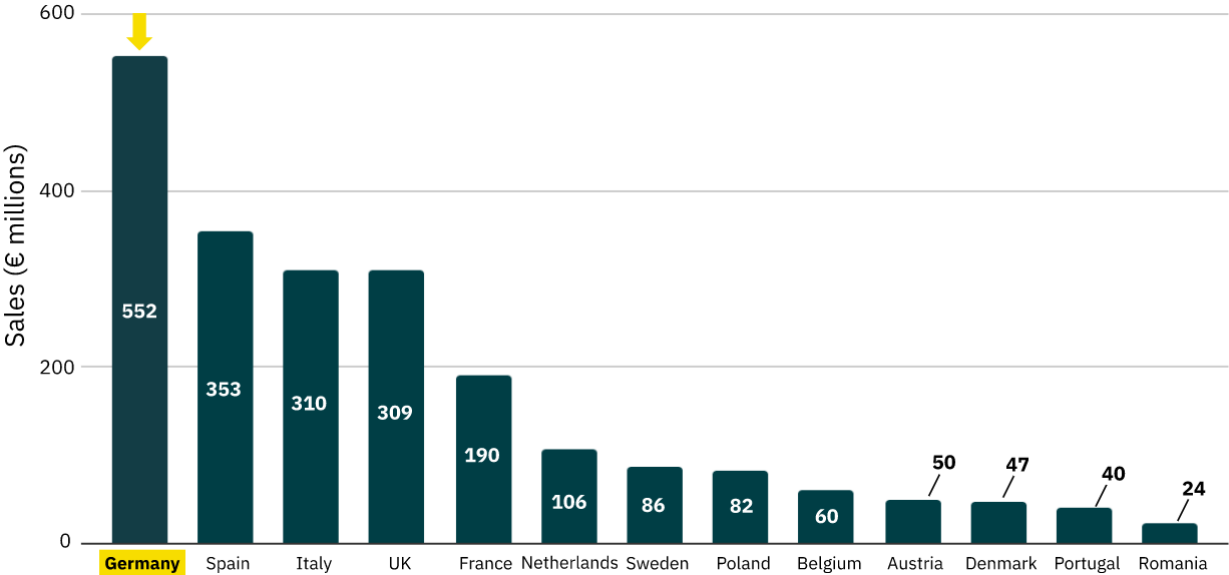
### Key insights:

- The value of plant-based milk sales grew 43% between 2020 and 2022, while total unit sales went up by 48%.
- In comparison, conventional milk unit sales decreased by 12% between 2020 and 2022.
- In terms of average price per unit, the plant-based milk category has been less impacted by inflation and price increases in 2022. Plant-based milk prices decreased by 1.5%, whereas conventional milk prices increased by 19%.
- In 2022, plant-based milk had a 13% market share of the total milk category, up from 10% in 2020.

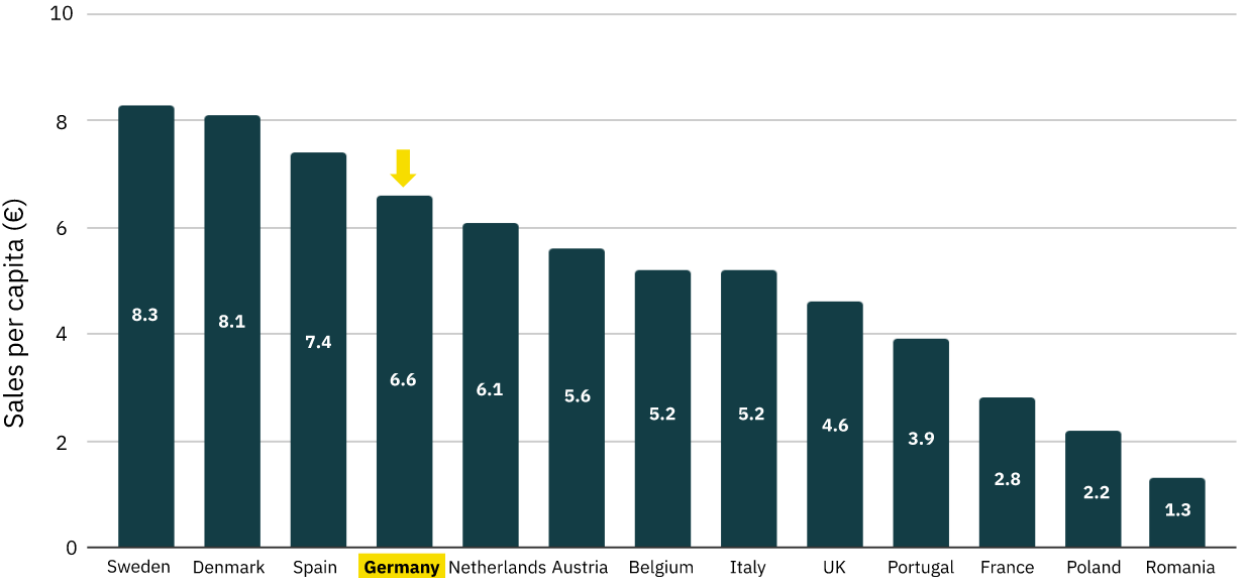
## Country comparison

Germany has the highest plant-based milk sales value in Europe. However, in terms of average plant-based milk spend per capita, Germany ranks fourth.

Europe-wide plant-based milk sales per country (in € millions), 2022

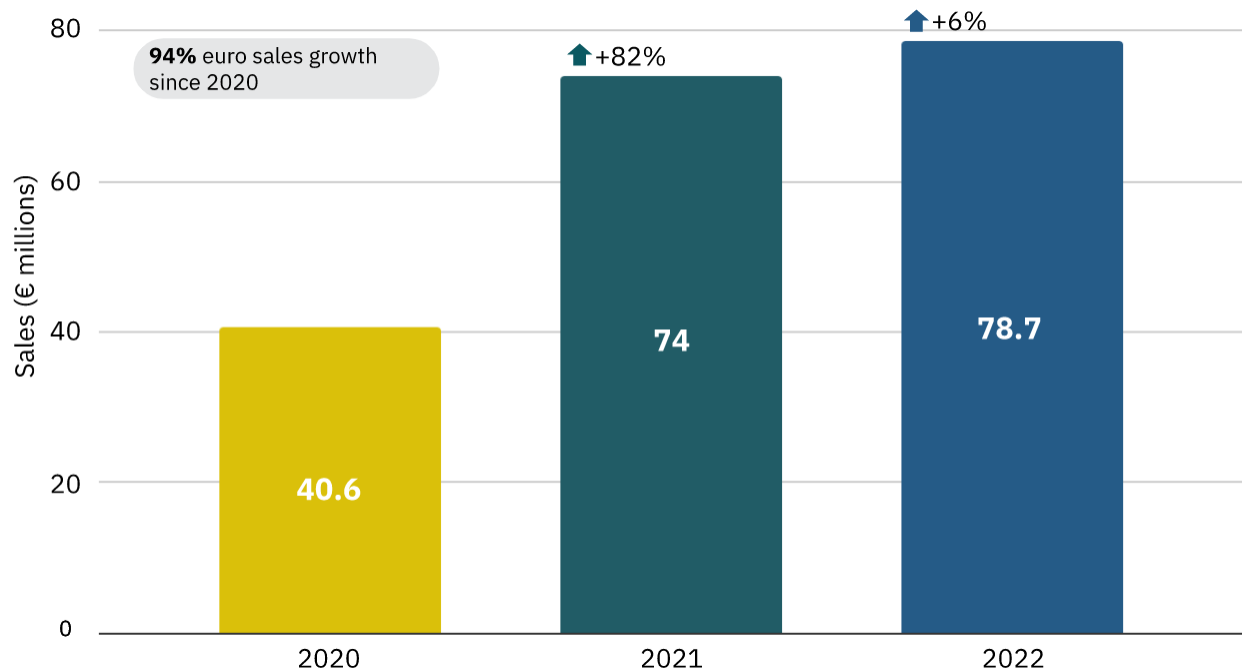


Europe-wide average plant-based milk spend per country per capita (in euros), 2022



# Plant-based cheese

## Plant-based cheese sales (in € millions), 2020-2022



### Key insights:

- The value of plant-based cheese sales grew 94% between 2020 and 2022, and unit sales grew 108%.
- In comparison, conventional cheese unit sales decreased by 7% between 2020 and 2022.
- In terms of average price per unit, the plant-based cheese category has been less impacted by inflation and price increases in 2022. Plant-based cheese prices actually decreased by 5%, whereas conventional cheese prices increased by 15%.
- In 2022, plant-based cheese had a 1% market share of the total cheese category.

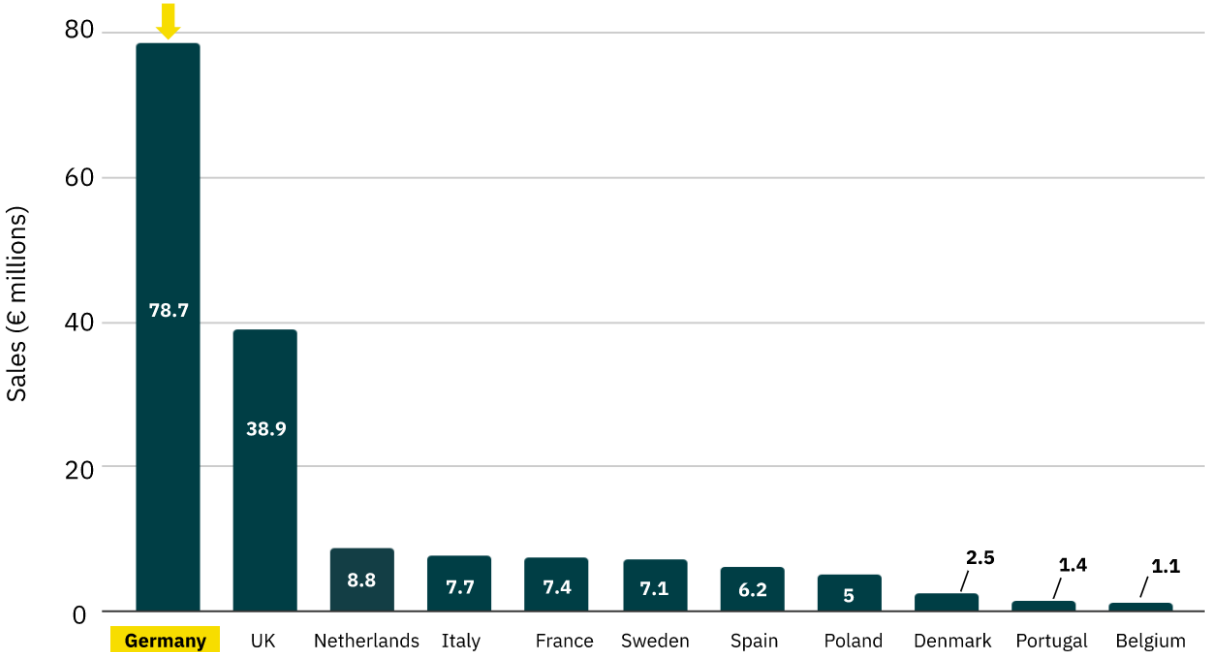
### Segment insights:

- The most popular plant-based cheese formats are hard cheese, which makes up 55% of sales by value, followed by grated cheese (23%) and feta (13%).

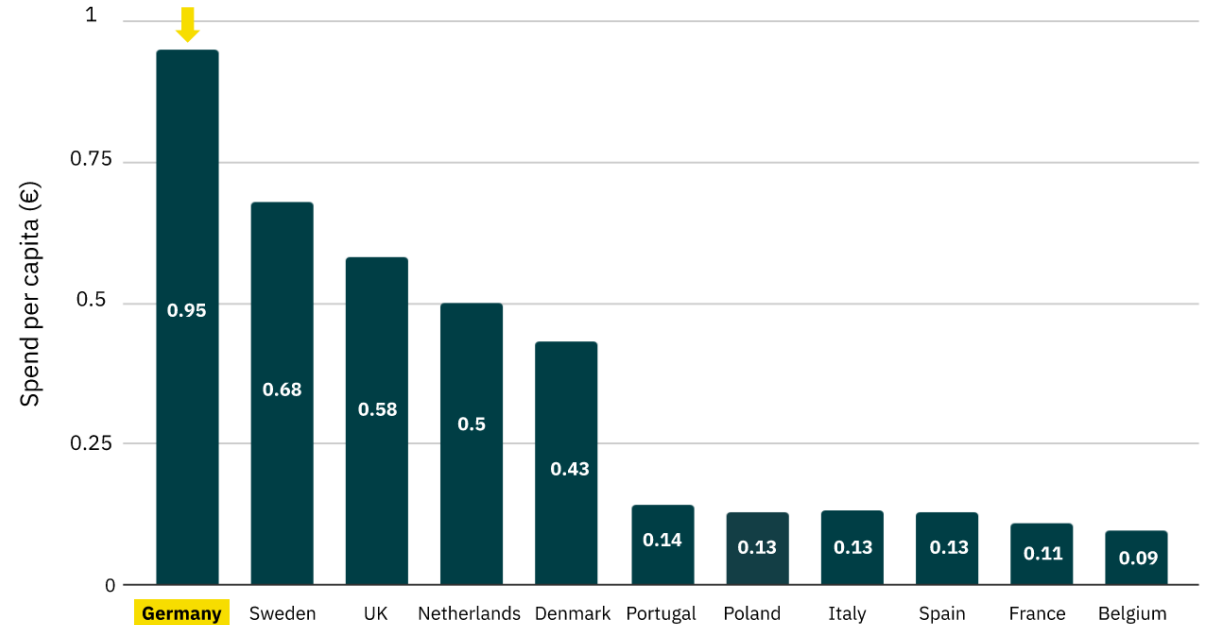
## Country comparison

Germany has the highest plant-based cheese sales value in Europe and the highest average plant-based cheese spend per capita.

Europe-wide plant-based cheese sales per country (in € millions), 2022



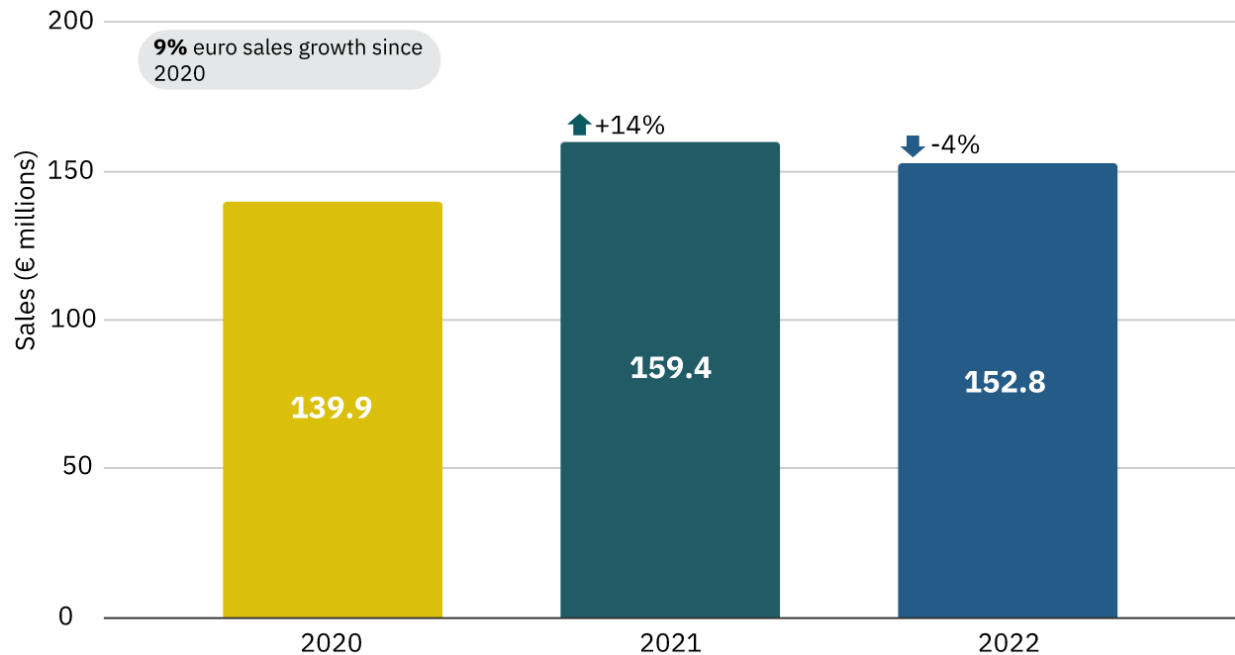
Europe-wide average plant-based cheese spend per country per capita (in euros), 2022





# Plant-based yoghurt

## Plant-based yoghurt sales (in € millions), 2020-2022



### Key insights:

- The value of plant-based yoghurt sales grew by 9% between 2020 and 2022, and unit sales grew by 12%.
- In comparison, conventional yoghurt unit sales decreased by 7% between 2020 and 2022.
- The average price per unit of plant-based yoghurt and conventional yoghurt in 2022 increased by 1% and 11% respectively.
- In 2022, plant-based yoghurt had a 5% market share of the total yoghurt category.

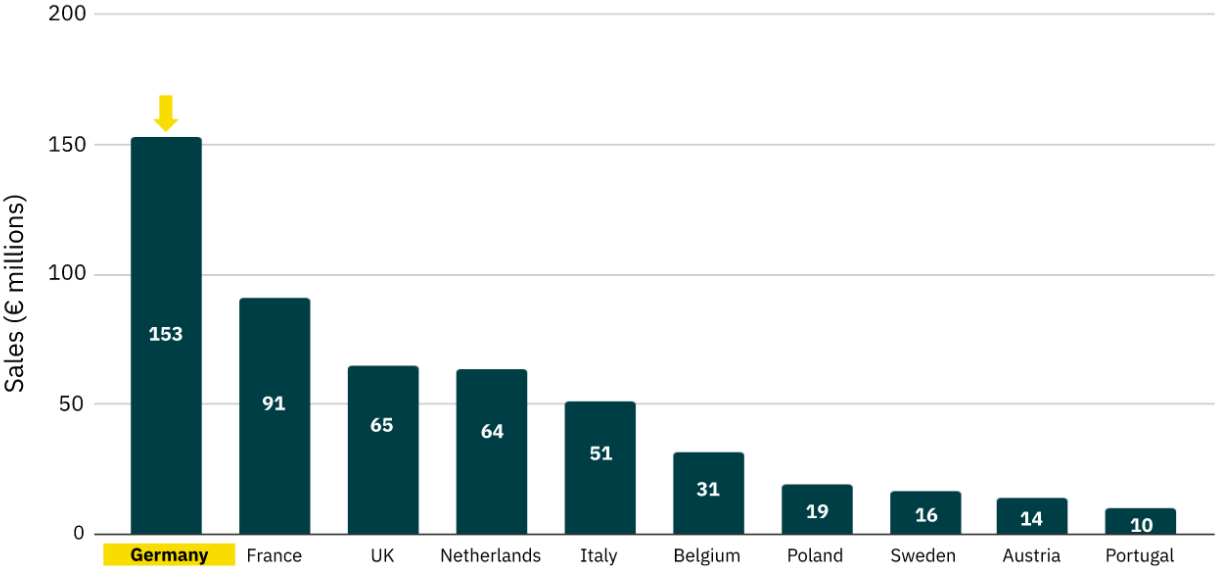
### Segment insights:

- Plain yoghurt is the category leader with 55% of category sales value in 2022, followed by fruit yoghurt (44%) and drinking yoghurt (1%).

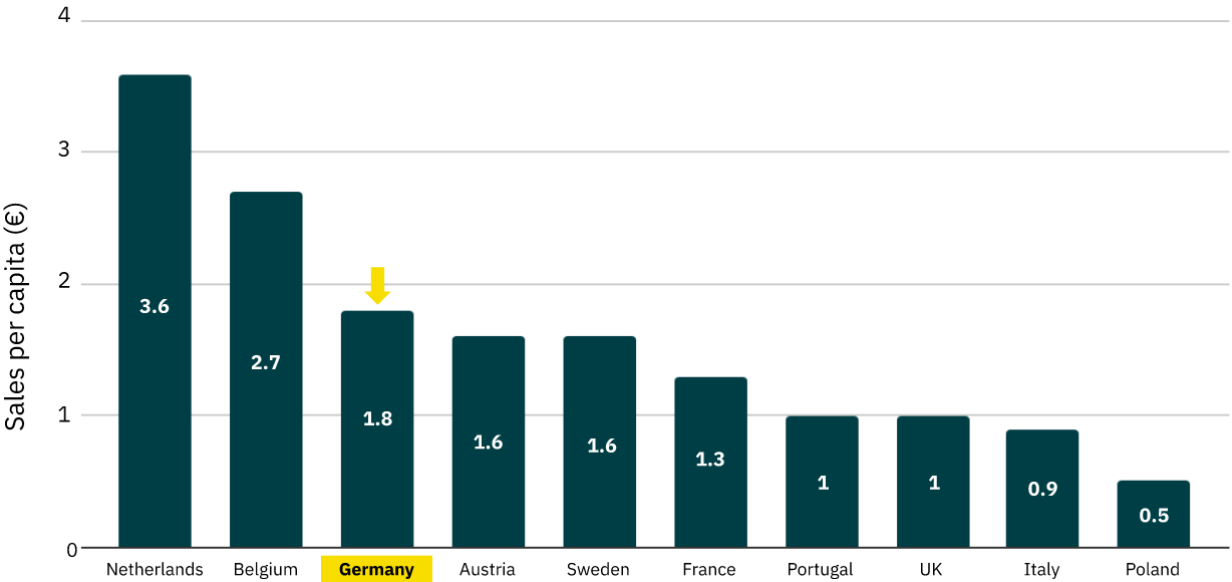
## Country comparison

Germany has the highest plant-based yoghurt sales value in Europe. However, in terms of average plant-based yoghurt spend per capita, Germany ranks third.

Europe-wide plant-based yoghurt sales per country (in € millions), 2022

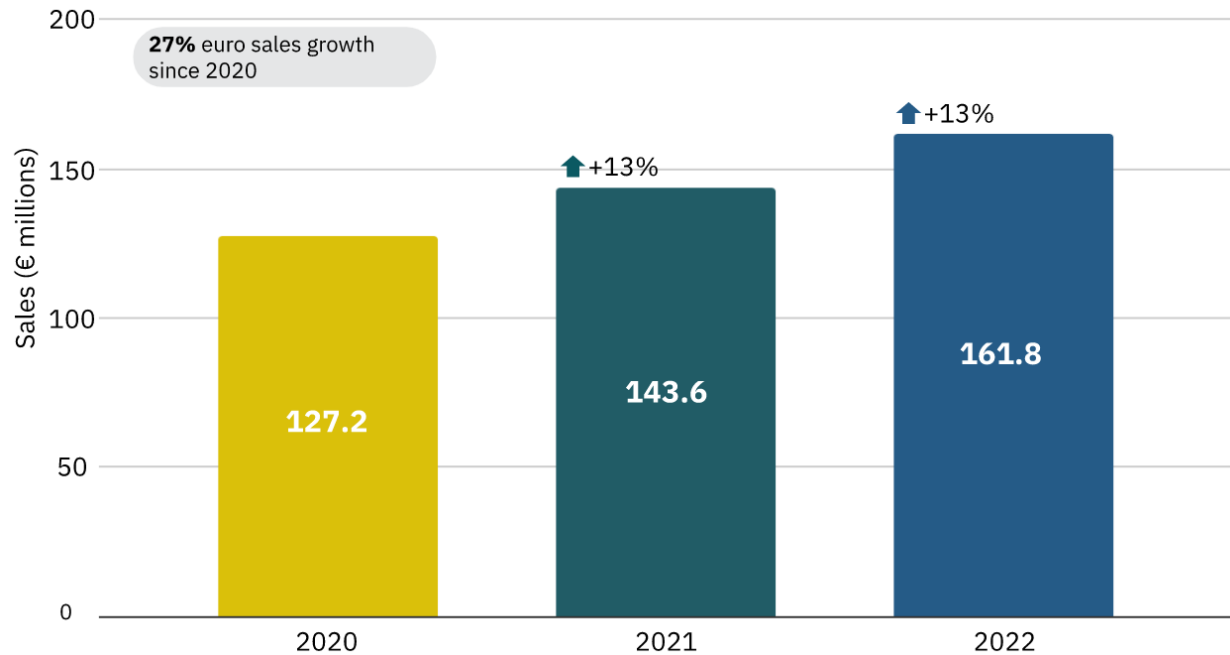


Europe-wide average plant-based yoghurt spend per country per capita (in euros), 2022



# Plant-based spreads<sup>3</sup>

## Plant-based spreads sales (in € millions), 2020-2022



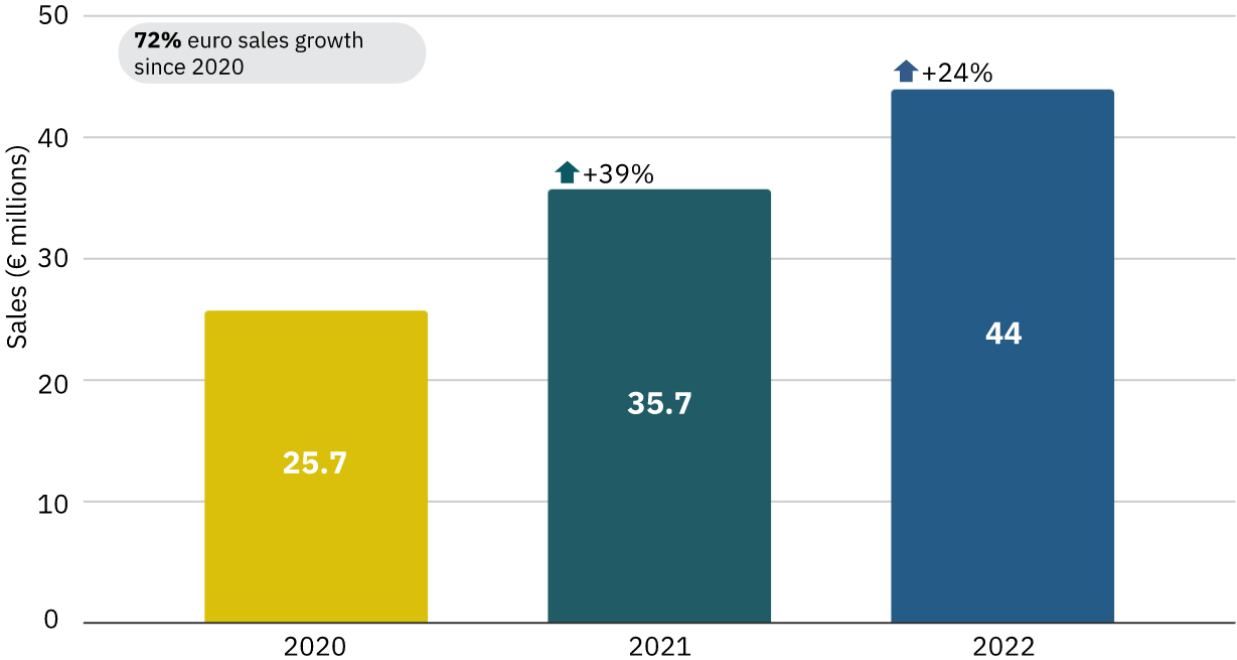
### Key insights:

- The value of plant-based spreads sales increased by 27% between 2020 and 2022.
- Plant-based spreads unit sales increased by 25% between 2020 and 2022.
- The average price per unit of plant-based spread in 2022 increased by 3%.

<sup>3</sup> The plant-based spreads category is made up of vegetable and plant-based dairy spreads.

# Plant-based cream

Plant-based cream sales (in € millions), 2020-2022

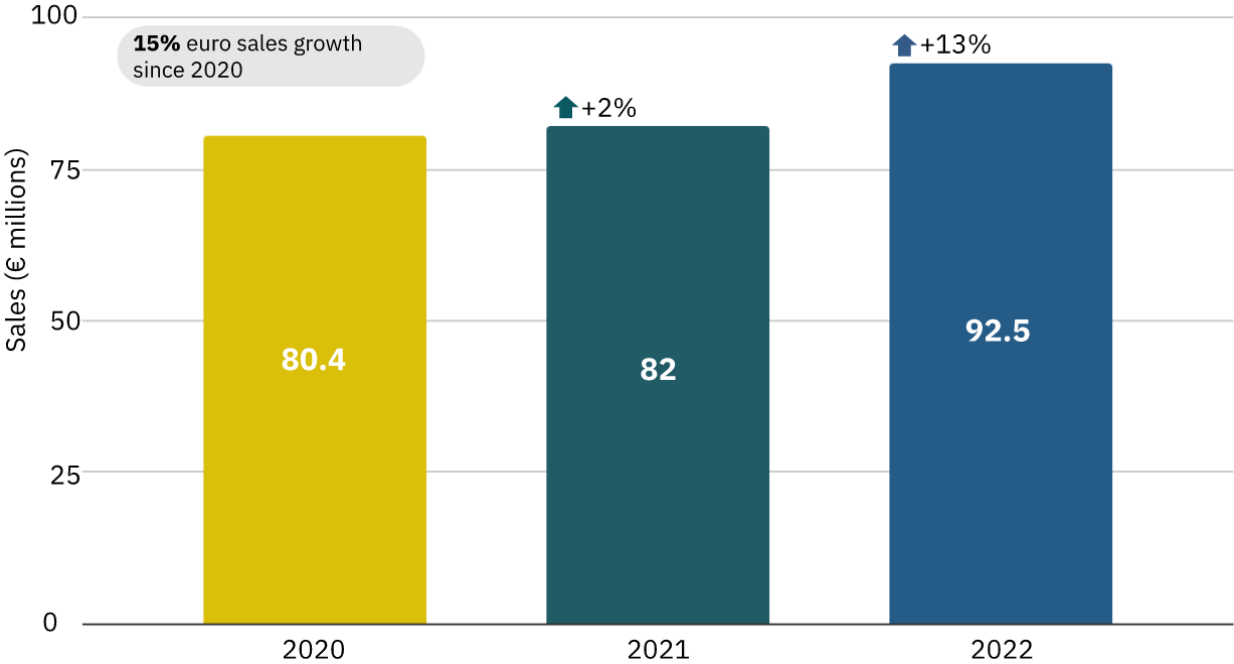


Key insights:

- The value of plant-based cream sales grew 72% between 2020 and 2022.
- Plant-based cream unit sales grew 58% between 2020 and 2022.
- The average price per unit of plant-based cream in 2022 increased by 9%.

# Plant-based ice cream

Plant-based ice cream sales (in € millions), 2020-2022

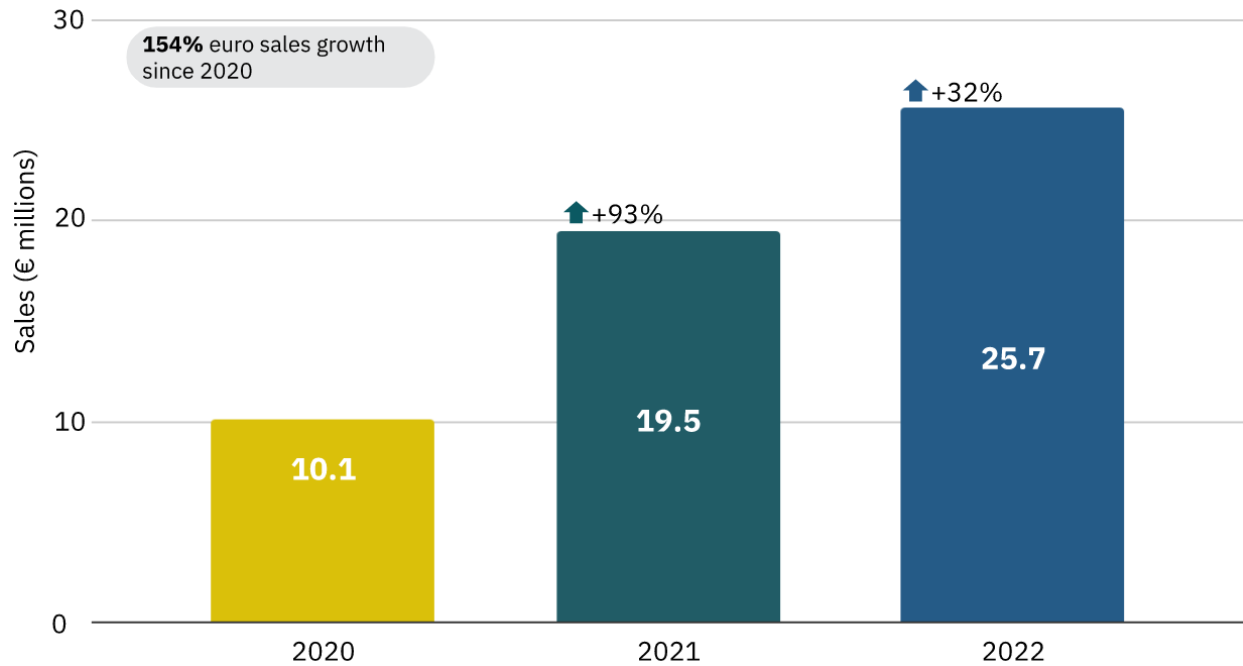


## Key insights:

- The value of plant-based ice cream sales increased by 15% between 2020 and 2022.
- Plant-based ice cream unit sales increased by 20% between 2020 and 2022.
- The average price per unit of plant-based ice cream in 2022 decreased by 4%.

# Plant-based dessert<sup>4</sup>

## Plant-based dessert euro sales (in millions), 2020-2022



### Key insights:

- The value of plant-based dessert sales grew 154% between 2020 and 2022.
- Plant-based dessert unit sales grew 227% between 2020 and 2022.
- The average price per unit of plant-based dessert in 2022 increased by 0.4%.

<sup>4</sup> The plant-based dessert category is primarily made up of puddings.

## Closing remarks

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“The plant-based food retail market in Europe has seen significant growth in recent years, driven by better plant-based products being brought to market. This is encouraging as the world works to address the many problems caused by industrial animal agriculture. However, to sustain this growth, companies must continue investing in product innovation to develop plant-based products that meet consumer expectations when it comes to the key drivers of taste, price, and convenience. The Good Food Institute’s [Advancing Solutions for Alternative Proteins database](#) is a great source to better understand key innovation priorities.”

**Carlotta Lucas,**  
*Senior Corporate Engagement Manager at  
the Good Food Institute Europe*



## About the data

To size the German retail market for plant-based foods, GFI Europe commissioned retail sales data from market research firm NielsenIQ. Analysis in this report is based on data reported by NielsenIQ for the total plant-based, total dairy products, and total pre-packed meat categories for the 52-week, 104-week, and 156-week periods ending 31 December 2022, for the Germany market, according to GFI Europe product hierarchy. Therefore the data presented in this report may not align with standard NielsenIQ categories. Copyright © 2022, Nielsen Consumer, LLC.

## About the Good Food Institute Europe

[The Good Food Institute Europe](#) is an international NGO helping to build a more sustainable, secure and just food system by transforming meat production.

We work with scientists, businesses and policymakers to advance plant-based and cultivated meat – making them delicious, affordable and accessible across Europe.

By making meat from plants and cultivating it from cells, we can reduce the environmental impact of our food system and feed more people with fewer resources. GFI Europe is powered by philanthropy.

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