



Processed Meat, Seafood and Alternatives To Meat in Germany

November 2025

KEY DATA FINDINGS

2025 DEVELOPMENTS

Increased consumer conservatism in price and taste

INDUSTRY PERFORMANCE

Affordable proteins and simple labels guide shopper choices

Meat and seafood substitutes expanding

WHAT'S NEXT?

Poultry and simple seafood sustain demand while plant-based segment grows steadily

Cleaner labels, leaner recipes, and simple formats guide choices

Rules, data tools, and markdowns drive efficient, sustainable growth

COMPETITIVE LANDSCAPE

Private label leads as retailers win on range and readiness

Private label segment responds to consumer needs

CHANNELS

Discounters lead on price, reach and chilled availability

E-commerce continues to expand

CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

Table 3 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2020-2025

Table 4 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2020-2025

Table 5 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 6 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 7 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2020-2025

Table 8 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2020-2025

Table 9 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2020-2025

Table 10 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2025

Table 11 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2022-2025

Table 12 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2020-2025

Table 13 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2025-2030

Table 14 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2025-2030

COUNTRY REPORTS DISCLAIMER

Staple Foods in Germany - Industry Overview

EXECUTIVE SUMMARY

Affordability, convenience, and health are primary considerations

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

High levels of budget consciousness

Affordability and clarity prove key

WHAT'S NEXT?

Brands need to show clear, everyday benefits in face of strong private label competition

Private label to quickly mirror brand moves

Discounters to remain key, while online channel continues to develop

COMPETITIVE LANDSCAPE

Major retailers lead

Simplicity and practicality are key to success

CHANNELS

Discounters gaining share

E-commerce maintains significant growth

MARKET DATA

Table 15 - Sales of Staple Foods by Category: Volume 2020-2025

Table 16 - Sales of Staple Foods by Category: Value 2020-2025

Table 17 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 18 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 19 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 20 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 21 - Penetration of Private Label by Category: % Value 2020-2025

Table 22 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 23 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 24 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 25 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 26 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/processed-meat-seafood-and-alternatives-to-meat-in-germany/report.