

Germany Dairy Alternatives - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Germany Dairy Alternatives Market size is estimated at USD 2.10 billion in 2024, and is expected to reach USD 4.09 billion by 2029, growing at a CAGR of 14.26% during the forecast period (2024-2029).

Strong penetration of organized retail channels fueling the market growth

- The off-trade segment dominates the distribution channels of the German dairy alternatives market. Among off-trade channels, the online retail sub-segment is the fastest-growing one, projected to record a CAGR of 15.6% over the forecast period. The growth of e-commerce has allowed companies to access a larger target market and effectively serve customer needs. Many people started ordering food items, particularly dairy alternatives, online due to their hectic schedules and the nationwide lockdown in 2020. The four main e-commerce channels for dairy alternatives were direct-to-consumer, click-and-collect, retail grocery delivery, and concierge services.
- The sales value of dairy alternatives through on-trade channels across the country declined by 2% in 2020 as foodservice outlets were shut down due to the pandemic. In the same year, Germany recorded only 65,090 functional restaurants, a decrease of 8.49% from 2019. Based on the data from all distribution channels, the overall consumption in Germany was around 5.03 kg per person in 2022, with a 3.4 kg rise in the consumption of dairy alternatives since 2017. The on-trade channel is likely to record a CAGR of 10.7% during the forecast period.
- Off-trade is projected to be the fastest-growing distribution channel, registering a CAGR value of 15.7% during the forecast period. This increase is anticipated in line with the rising demand for dairy alternative products, which are widely accessible at supermarkets and online retailers. The omnichannel approach adopted by major retailers across the globe is also driving the market for dairy desserts. Retailers such as REWE, Edeka, Aldi Sud, and Norma focus on omnichannel shopping, particularly

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expanding and integrating online capabilities into brick-and-mortar stores.

Germany Dairy Alternatives Market Trends

The rising vegan movement in the country has emerged as a major factor influencing the consumption of dairy alternatives in Germany

- The vegan movement in Europe has seen Germany take the lead. Berlin and Hamburg both rank in the top five cities in the world for vegan friendliness, making Germany the sixth-best nation in the world for vegans. In comparison to other European nations, the nation boasts one of the highest percentages of vegetarians and vegans. In Germany, 1.58 million people follow a vegan diet, and over 8 million people eat vegetarian food. Flexitarians make up more than 30% of the German population. Growing numbers of Germans that are vegan, vegetarian, and flexitarian are driving the market for plant-based goods.

- Germans consumed 318.5 thousand metric tons of milk alternatives in 2022. About one-third of the German population did not drink milk at all but used milk alternatives. German dairy alternatives consumption increased by 19.94% in 2022 compared to 2021. Around 32% of the population intended to consume less dairy in 2022. About 48% of German consumers stated that an organic, clean-label, allergen-free product is significant to them regarding plants (such as meat and dairy substitutes). A vegan claim was made on the packaging of 20% of all food and beverage products introduced in Germany in 2020, up from 14% in 2016. The growing demand for vegan-friendly cuisine among consumers in Germany is anticipated to increase the consumption trends of dairy substitutes. The number of vegans in Europe increased from 1.3 million in 2016 to 2.6 million in 2020. Apart from the mainstream brands such as Alpro, Bayerngluck, Oatly, Whole Foods, and Miyoko, traditional companies have also established themselves in the vegan dairy market, offering dairy alternatives from labels like Soyana, Lord of Tofu, and Soyatoo.

Germany Dairy Alternatives Industry Overview

The Germany Dairy Alternatives Market is fragmented, with the top five companies occupying 35.58%. The major players in this market are AlnaturA Produktions- und Handels GmbH, Bel Group, Danone SA, Nestle SA and Oatly Group AB (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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