

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

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Report description:

The Germany Non-Dairy Milk Market size is estimated at USD 1.34 billion in 2024, and is expected to reach USD 2.56 billion by 2029, growing at a CAGR of 13.82% during the forecast period (2024-2029).

Easy availability of dairy products through wide retail sector is boosting the growth.

- In 2022, distribution channels in the German plant-based milk market witnessed a growth of 21.35 compared to 2021. Off-trade retailing has been dominating Germany's retail space during the review period (2017-2022). In 2022, off-trade retailing held a share of 94.3%. In Germany, consumers significantly prefer off-trade retailing due to the greater convenience they receive while purchasing plant-based milk.

- On-trade retailing held a share of 5.73% in Germany in 2022. In on-trade channels (quick-service restaurants), the prices are fixed for plant-based milk, while consumers are given several options in off-trade channels. In Germany, off-trade channels offer plant-based milk at varied prices (low, medium, and high). The oat milk sold by these retailing units is available from EUR 2.78 to as high as EUR 35.4. The availability of plant-based milk at varied prices also promotes the buying power among consumers as they can purchase the products that suit their affordability parameters.

- In Germany, on-trade retailers are focusing on providing a variety of plant-based milk, including different flavors such as unsweetened, chocolate, and vanilla. Despite offering different flavors, these retailers cannot provide complete information such as product specifics (ingredient used, seed used, and others) to consumers. As a result of this, consumers purchase plant-based milk beverages through off-trade modes. In the last three years, under the off-trade mode, specialty stores have recorded significant demand as they offer higher visibility about the product to consumers. In line with the growing demand for plant-based milk, sales through the distribution segment are expected to grow by 65.24% in 2025 from 2022.

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Germany Non-Dairy Milk Market Trends

The increasing popularity of plant-based milk products owing to health benefits is driving the consumption

- In 2022, the German per capita consumption of milk alternatives observed a growth of 1.35% compared to 2021. Domestic consumption of plant-based milk increased as a result of the COVID-19 pandemic in 2020 and was substantially sustained till 2022. About one-third of the German population does not drink milk at all but uses milk alternatives.
- The plant-based milk category is already developed in Germany owing to increased consumption. There are over 50 labels that offer plant-based milk options to German consumers. The demand for plant-based milk is still growing; consumption almost doubled between 2018 (22%) and 2020 (42%). Compared to other plant-based products such as cheese and meat, plant-based milk alternatives lead the plant-based food market. Many consumers are already well familiar with milk alternatives like soy and coconut milk. In Germany, 93% of consumers already consume plant-based milk alternatives, which is a higher consumption rate than in any of the other plant-based product categories.
- Oat milk leads the plant-based milk category, with the highest per capita consumption among other plant-based milk products in the region. Per capita consumption of oat milk increased by 1.62% in 2022 and is anticipated to increase by 35.6% during 2023-2025. Plant milk is being increasingly mentioned in more national nutrition guidelines, which is another strong reason influencing people to consume plant milk. So far, 23 countries worldwide, including Germany, have integrated plant milk into their national nutrition guidelines as an alternative to cow's milk. The easy accessibility of these products via German offline and online supermarkets like Rewe, Bringmeister, Globus, and Amazon Fresh, including mainstream and local brands such as Allos, Vitaquell, and Sojade, is anticipated to drive consumption in the regions.

Germany Non-Dairy Milk Industry Overview

The Germany Non-Dairy Milk Market is moderately consolidated, with the top five companies occupying 48.51%. The major players in this market are AlnaturaA Produktions - und Handels GmbH, Danone SA, Oatly Group AB, The Hain Celestial Group Inc. and Triballat Noyal SaS (sorted alphabetically).

Additional Benefits:

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

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