

Dairy Products and Alternatives in Germany

Market Direction | 2024-08-20 | 80 pages | Euromonitor

AVAILABLE LICENSES:

- Single User Licence €2150.00
- Multiple User License (1 Site) €4300.00
- Multiple User License (Global) €6450.00

Report description:

Dairy products and alternatives in Germany is set to experience growth in 2024 overall, marked by increases in both retail current value and volume sales. This upward trend reflects a dynamic industry in which traditional dairy products and plant-based alternatives coexist and thrive. German consumers maintain a strong cultural attachment to dairy products, with products such as cheese, yoghurt, and milk remaining staples in their diet. This enduring preference underscores the deep-rooted tradit...

Euromonitor International's Dairy Products and Alternatives in Germany report offers in-depth knowledge of the market at a national level, providing local insight and understanding unavailable elsewhere. In addition to the latest retail sales data 2019-2023, it identifies the leading companies, brands and retail outlets, and assesses the key trends and demographic shifts behind consumer demand and sales growth. How key trends such as health and wellness, sustainability and recovery from the pandemic are shaping the market in <|Year|> directly informs our forecasts to 2028, clearly indicating how the market is expected to change.

Product coverage: Baby Food, Dairy, Plant-based Dairy.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

Why buy this report?

- * Get a detailed picture of the Dairy Products and Alternatives market;
- * Pinpoint growth sectors and identify factors driving change;
- * Understand the competitive environment, the market's major players and leading brands;
- * Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop

Table of Contents:

Dairy Products and Alternatives in Germany Euromonitor International August 2024

List Of Contents And Tables

DAIRY PRODUCTS AND ALTERNATIVES IN GERMANY

EXECUTIVE SUMMARY

Dairy products and alternatives in 2024: The big picture

Key trends in 2024

Competitive landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 Sales of Dairy Products and Alternatives by Category: Value 2019-2024

Table 2 Sales of Dairy Products and Alternatives by Category: % Value Growth 2019-2024

Table 3 NBO Company Shares of Dairy Products and Alternatives: % Value 2020-2024

Table 4 LBN Brand Shares of Dairy Products and Alternatives: % Value 2021-2024

Table 5 Penetration of Private Label by Category: % Value 2019-2024

Table 6 Distribution of Dairy Products and Alternatives by Format: % Value 2019-2024

Table 7 Forecast Sales of Dairy Products and Alternatives by Category: Value 2024-2029

Table 8 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 Research Sources

BABY FOOD IN GERMANY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Baby food records marginal volume growth despite development of powder special milk formula

Hipp and Milupa lead baby food in Germany due to innovation and customer loyalty

Distribution led by health and beauty specialists, especially drugstores

PROSPECTS AND OPPORTUNITIES

Lower birth rates present challenges for baby food in Germany

Interest in sustainability to continue shaping new product development

Plant-based trend to remain relevant in baby food over the forecast period

CATEGORY DATA

Table 9 Sales of Baby Food by Category: Volume 2019-2024

Table 10 Sales of Baby Food by Category: Value 2019-2024

Table 11 Sales of Baby Food by Category: % Volume Growth 2019-2024

Table 12 Sales of Baby Food by Category: % Value Growth 2019-2024

Table 13 Sales of Growing-Up Milk Formula by Age: % Value 2019-2024

Table 14 NBO Company Shares of Baby Food: % Value 2020-2024

Table 15 LBN Brand Shares of Baby Food: % Value 2021-2024

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 16 Distribution of Baby Food by Format: % Value 2019-2024

Table 17 Forecast Sales of Baby Food by Category: Volume 2024-2029

Table 18 ∏Forecast Sales of Baby Food by Category: Value 2024-2029

Table 19 [Forecast Sales of Baby Food by Category: % Volume Growth 2024-2029

Table 20 [Forecast Sales of Baby Food by Category: % Value Growth 2024-2029

BUTTER AND SPREADS IN GERMANY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Marginal retail volume decline for butter and spreads in 2024

Dominant private label grows, but Ornua remains leading player

Growth of foodservice volumes highlights different dynamics in German households

PROSPECTS AND OPPORTUNITIES

Health concerns to impact category and potential recovery

Competition from vegetable oils as substitutes set to be an obstacle for butter and spreads

Margarine not expected to benefit from plant-based trend as substitute for butter

CATEGORY DATA

Table 21 Sales of Butter and Spreads by Category: Volume 2019-2024

Table 22 Sales of Butter and Spreads by Category: Value 2019-2024

Table 23 Sales of Butter and Spreads by Category: % Volume Growth 2019-2024

Table 24 Sales of Butter and Spreads by Category: % Value Growth 2019-2024

Table 25 NBO Company Shares of Butter and Spreads: % Value 2020-2024

Table 26 LBN Brand Shares of Butter and Spreads: % Value 2021-2024

Table 27 Distribution of Butter and Spreads by Format: % Value 2019-2024

Table 28 Forecast Sales of Butter and Spreads by Category: Volume 2024-2029

Table 29 Forecast Sales of Butter and Spreads by Category: Value 2024-2029

Table 30 ☐Forecast Sales of Butter and Spreads by Category: % Volume Growth 2024-2029

Table 31 [Forecast Sales of Butter and Spreads by Category: % Value Growth 2024-2029

CHEESE IN GERMANY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Positive performance by cheese, supported by hard format

Private label retains strength, challenging traditional German cheese brands

Discounters remains leading distribution channel for cheese in Germany

PROSPECTS AND OPPORTUNITIES

Evolution of consumer behaviour and German lifestyles could drive further growth of cheese

Interest in sustainability and animal welfare to impact cheese to a certain extent

Interest in premium cheese, regionality and authenticity to support future growth

CATEGORY DATA

Table 32 Sales of Cheese by Category: Volume 2019-2024

Table 33 Sales of Cheese by Category: Value 2019-2024

Table 34 Sales of Cheese by Category: % Volume Growth 2019-2024

Table 35 Sales of Cheese by Category: % Value Growth 2019-2024

Table 36 Sales of Spreadable Cheese by Type: % Value 2019-2024

Table 37 Sales of Soft Cheese by Type: % Value 2019-2024

Table 38 Sales of Hard Cheese by Type: % Value 2019-2024

Table 39 NBO Company Shares of Cheese: % Value 2020-2024

Table 40 LBN Brand Shares of Cheese: % Value 2021-2024

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 41 □Distribution of Cheese by Format: % Value 2019-2024

Table 42 [Forecast Sales of Cheese by Category: Volume 2024-2029

Table 43 [Forecast Sales of Cheese by Category: Value 2024-2029

Table 44 [Forecast Sales of Cheese by Category: % Volume Growth 2024-2029 Table 45 [Forecast Sales of Cheese by Category: % Value Growth 2024-2029

DRINKING MILK PRODUCTS IN GERMANY

KEY DATA FINDINGS

2024 DEVELOPMENTS

New trends and patterns in consumer behaviour place pressure on drinking milk products

Animal welfare concerns and demand for quality push pasture milk forward

Private label leads the competitive landscape, especially through discounters

PROSPECTS AND OPPORTUNITIES

Sustainability concerns and demographic developments shape packaging of drinking milk products

Functional and fortified milk products to attract greater attention from consumers

Indulgence trend, present in other industries, has potential to shape the future of flavoured milk drinks

CATEGORY DATA

Table 46 Sales of Drinking Milk Products by Category: Volume 2019-2024

Table 47 Sales of Drinking Milk Products by Category: Value 2019-2024

Table 48 Sales of Drinking Milk Products by Category: % Volume Growth 2019-2024

Table 49 Sales of Drinking Milk Products by Category: % Value Growth 2019-2024

Table 50 NBO Company Shares of Drinking Milk Products: % Value 2020-2024

Table 51 LBN Brand Shares of Drinking Milk Products: % Value 2021-2024

Table 52 Distribution of Drinking Milk Products by Format: % Value 2019-2024

Table 53 Forecast Sales of Drinking Milk Products by Category: Volume 2024-2029

Table 54 Forecast Sales of Drinking Milk Products by Category: Value 2024-2029

Table 55 [Forecast Sales of Drinking Milk Products by Category: % Volume Growth 2024-2029

Table 56 ∏Forecast Sales of Drinking Milk Products by Category: % Value Growth 2024-2029

YOGHURT AND SOUR MILK PRODUCTS IN GERMANY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Retail demand for yoghurt and sour milk products in Germany declines

Private label remains strong while Danone leads overall category

Discounters and supermarkets remain leading channels for yoghurt and sour milk products in Germany

PROSPECTS AND OPPORTUNITIES

Probiotic traits of yoghurt and sour milk products to play a role in its development

Newer global products to further penetrate German market

Flavoured yoghurt set to decrease faster than plain options over forecast period

CATEGORY DATA

Table 57 Sales of Yoghurt and Sour Milk Products by Category: Volume 2019-2024

Table 58 Sales of Yoghurt and Sour Milk Products by Category: Value 2019-2024

Table 59 Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2019-2024

Table 60 Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2019-2024

Table 61 Sales of Flavoured Yoghurt by Flavour: Rankings 2019-2024

Table 62 NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2020-2024

Table 63 LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2021-2024

Table 64 Distribution of Yoghurt and Sour Milk Products by Format: % Value 2019-2024

Table 65 Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2024-2029

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table 66 ☐Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2024-2029

Table 67 \square Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2024-2029

Table 68 | Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2024-2029

OTHER DAIRY IN GERMANY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Other dairy stagnates in 2024 amidst various trends

Protein-enriched products benefit from consumer interest in protein-rich diets and fitness

Consumer trust and innovative assortments ensure the lead of private label in chilled and shelf stable desserts

PROSPECTS AND OPPORTUNITIES

Health concerns mean consumers are seeking products with reduced sugar content

Other dairy to benefit from the indulgence trend already present in other packaged food industries

Quark, a traditional German dairy product, already shows signs of bigger potential in the future

CATEGORY DATA

Table 69 Sales of Other Dairy by Category: Volume 2019-2024

Table 70 Sales of Other Dairy by Category: Value 2019-2024

Table 71 Sales of Other Dairy by Category: % Volume Growth 2019-2024

Table 72 Sales of Other Dairy by Category: % Value Growth 2019-2024

Table 73 Sales of Cream by Type: % Value 2019-2024

Table 74 NBO Company Shares of Other Dairy: % Value 2020-2024

Table 75 LBN Brand Shares of Other Dairy: % Value 2021-2024

Table 76 Distribution of Other Dairy by Format: % Value 2019-2024

Table 77 Forecast Sales of Other Dairy by Category: Volume 2024-2029

Table 78 | Forecast Sales of Other Dairy by Category: Value 2024-2029

Table 79 [Forecast Sales of Other Dairy by Category: % Volume Growth 2024-2029

Table 80 ☐Forecast Sales of Other Dairy by Category: % Value Growth 2024-2029

PLANT-BASED DAIRY IN GERMANY

KEY DATA FINDINGS

2024 DEVELOPMENTS

Plant-based milk continues to grow in an established market

Consumers show trust in discounters as a channel for plant-based dairy products

Oatly and Alpro remain the absolute leaders in plant-based milk

PROSPECTS AND OPPORTUNITIES

Plant-based cheese to overcome obstacles in the German market

More consumers following plant-based diets also impacts foodservice

Functionality to have a positive impact

CATEGORY DATA

Table 81 Sales of Plant-Based Dairy by Category: Value 2019-2024

Table 82 Sales of Plant-Based Dairy by Category: % Value Growth 2019-2024

Table 83 Sales of Other Plant-Based Milk by Type: % Value 2021-2024

Table 84 NBO Company Shares of Plant-Based Dairy: % Value 2020-2024

Table 85 LBN Brand Shares of Plant-Based Dairy: % Value 2021-2024

Table 86 Distribution of Plant-Based Dairy by Format: % Value 2019-2024

Table 87 Forecast Sales of Plant-Based Dairy by Category: Value 2024-2029

Table 88 Forecast Sales of Plant-Based Dairy by Category: % Value Growth 2024-2029

Scotts International, EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



☐ - Print this form

To place an Order with Scotts International:

 $\hfill \Box$ - Complete the relevant blank fields and sign

Dairy Products and Alternatives in Germany

Market Direction | 2024-08-20 | 80 pages | Euromonitor

ORDER FORM:						
elect license	License					Price
elect licerise	Single User I	icence				€2150.00
		r License (1 Site)				€4300.00
		Multiple User License (Global)				
		VAT				
					Total	
** VAT will be added			s please contact support@ individuals and EU based			
** VAT will be added						
** VAT will be added mail*			individuals and EU based			
** VAT will be added mail* irst Name*			individuals and EU based Phone*			
** VAT will be added mail* irst Name* ob title*			individuals and EU based Phone*	companies who are		
** VAT will be added Email* irst Name* bb title* Company Name*			Phone* Last Name*	companies who are		
			Phone* Last Name* EU Vat / Tax ID	companies who are		
** VAT will be added mail* irst Name* ob title* ompany Name* ddress*			Phone* Last Name* EU Vat / Tax ID City*	companies who are		

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com www.scotts-international.com