



Cooking Ingredients and Meals in Germany

November 2025

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Cooking Ingredients and Meals in Germany

EXECUTIVE SUMMARY

Strong retail value sales growth in line with key trends in packaged food

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Players adapt to market conditions

Convenience increases weight in consumer choices

Plant-based options enjoy rising demand

WHAT'S NEXT?

Sustainability to help shape the offer and presentation

Healthier and functional products to pique the interest of consumers

Easing price movements to push organic edible oils

COMPETITIVE LANDSCAPE

Strong private label offer in cooking ingredients and meals

Branded players look to capitalise on key trends

CHANNELS

Large modern grocery retailers dominate the distribution landscape

E-commerce enjoys ongoing development and growth

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Faster retail volume sales growth as prices ease

INDUSTRY PERFORMANCE

Rising interest in international cuisines spurs adventure in edible oils choices

Increasingly sophisticated consumer base informs category development

WHAT'S NEXT?

Olive oil to ride healthier perception to register the highest growth

New product launches set to focus on health benefits

Sustainability focus to continue to boost the appeal of organic and regional edible oils

COMPETITIVE LANDSCAPE

Private label retains bulk of retail value sales

Strong investment in portfolios push private label

CHANNELS

Large assortments and different price ranges appeal to consumers

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Busy lifestyles drive further demand for meals and soups

INDUSTRY PERFORMANCE

Frozen products gain from the needs of busy consumers and an improving quality perception

Vegan ready meals ride health, sustainability and ethical trends

WHAT'S NEXT?

Strong company activity but growth is expected to slow compared with the review period

Growing vegetarian and vegan offer in response to evolving consumer trends

Convenience and wellness to foster use of frozen food subscription services

COMPETITIVE LANDSCAPE

Aldi and Frosta show the strength of private label and brands, respectively

Price and quality factors push retail value sales of Gustavo Gusto

CHANNELS

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[Sauces, Dips and Condiments in Germany](#)

KEY DATA FINDINGS

2025 DEVELOPMENTS

Growth through affordability and versatility

INDUSTRY PERFORMANCE

Outdoor dining options gain popularity while interest in spices grows

Players look to offer healthier pasta sauces

WHAT'S NEXT?

Health and diversification continue to grow in importance

Popularity of Mediterranean food to pique interest in tomato pastes and purées

Consumer experimentation to increase the use of a variety of sauces with international dishes

COMPETITIVE LANDSCAPE

Established brands and private label remain popular

Kikkoman Trading Europe gains from an authentic and widening range of Asian options

CHANNELS

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Sweet Spreads in Germany

KEY DATA FINDINGS

2025 DEVELOPMENTS

Indulgence, health and sustainability shape sweet spreads

INDUSTRY PERFORMANCE

Nut and seed based spreads enjoy a perception of premium products at relatively low unit prices

Protein-enriched products to the fore

WHAT'S NEXT?

Health and affordability perceptions to continue to boost nut and seed based spreads

Companies set to focus on health benefits

Sustainability and ethical factors are set to grow in importance to consumers and players

COMPETITIVE LANDSCAPE

Ferrero Deutschland leverages Nutella's popularity to lead

The competition intensifies in sweet spreads

CHANNELS

Large modern grocery retailers cover consumer needs in sweet spreads

Preference to see and analyse products in-person limit interest in e-commerce

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