



**Euromonitor
International**

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

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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

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

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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

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