



# Passport

## Pulses in Germany

Euromonitor International

March 2024

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purposes only.

Some content and data have been  
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# PULSES IN GERMANY - CATEGORY ANALYSIS

## KEY DATA FINDINGS

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## 2023 DEVELOPMENTS

Peas remain one of the most popular pulses for Germans

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Beans are gaining popularity in foodservice and institutions

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## PROSPECTS AND OPPORTUNITIES

Germany explores global flavours and culinary diversity

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**Protein crop strategy aims to enhance local production**

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**Summary 1 Major Processors of Pulses 2023**

Company name	Product type	Rank
<b>Data removed from sample</b>		

Source: Euromonitor International from company reports, company research, trade press, trade sources

**CATEGORY DATA**

**Table 1 Total Sales of Pulses by Category: Total Volume 2018-2023**

'000 tonnes	2018	2019	2020	2021	2022	2023
Pulses	<b>Data removed from sample</b>					
Beans						
Peas						
Other Pulses						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 2 Total Sales of Pulses by Category: % Total Volume Growth 2018-2023**

% total volume growth	2022/23	2018-23 CAGR	2018/23 Total
Pulses	<b>Data removed from sample</b>		
Beans			

Peas  
Other Pulses

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 Retail Sales of Pulses by Category: Volume 2018-2023**

'000 tonnes

2018 2019 2020 2021 2022 2023

Pulses  
Beans  
Peas  
Other Pulses

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4 Retail Sales of Pulses by Category: % Volume Growth 2018-2023**

% volume growth

2022/23 2018-23 CAGR 2018/23 Total

Pulses  
Beans  
Peas  
Other Pulses

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 Retail Sales of Pulses by Category: Value 2018-2023**

EUR million

2018 2019 2020 2021 2022 2023

Pulses  
Beans  
Peas  
Other Pulses

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 6 Retail Sales of Pulses by Category: % Value Growth 2018-2023**

% current value growth

2022/23 2018-23 CAGR 2018/23 Total

Pulses  
Beans  
Peas  
Other Pulses

**Data removed from sample**

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 7 Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2018-2023**

% retail volume	2018	2019	2020	2021	2022	2023
Packaged	<b>Data removed from sample</b>					
Unpackaged						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 8 Forecast Total Sales of Pulses by Category: Total Volume 2023-2028**

'000 tonnes	2023	2024	2025	2026	2027	2028
Pulses	<b>Data removed from sample</b>					
Beans						
Peas						
Other Pulses						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 9 Forecast Total Sales of Pulses by Category: % Total Volume Growth 2023-2028**

% total volume growth	2023/24	2023-28 CAGR	2023/28 Total
Pulses	<b>Data removed from sample</b>		
Beans			
Peas			
Other Pulses			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 10 Forecast Retail Sales of Pulses by Category: Volume 2023-2028**

'000 tonnes	2023	2024	2025	2026	2027	2028
Pulses	<b>Data removed from sample</b>					
Beans						
Peas						
Other Pulses						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 11 Forecast Retail Sales of Pulses by Category: % Volume Growth 2023-2028**

% volume growth	2023/24	2023-28 CAGR	2023/28 Total
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Pulses  
Beans  
Peas  
Other Pulses

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 12 Forecast Retail Sales of Pulses by Category: Value 2023-2028**

EUR million	2023	2024	2025	2026	2027	2028
Pulses	<b>Data removed from sample</b>					
Beans						
Peas						
Other Pulses						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 13 Forecast Retail Sales of Pulses by Category: % Value Growth 2023-2028**

% constant value growth	2023/2024	2023-28 CAGR	2023/28 Total
Pulses	<b>Data removed from sample</b>		
Beans			
Peas			
Other Pulses			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

# FRESH FOOD IN GERMANY - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

### Fresh food in 2023: The big picture

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### 2023 key trends

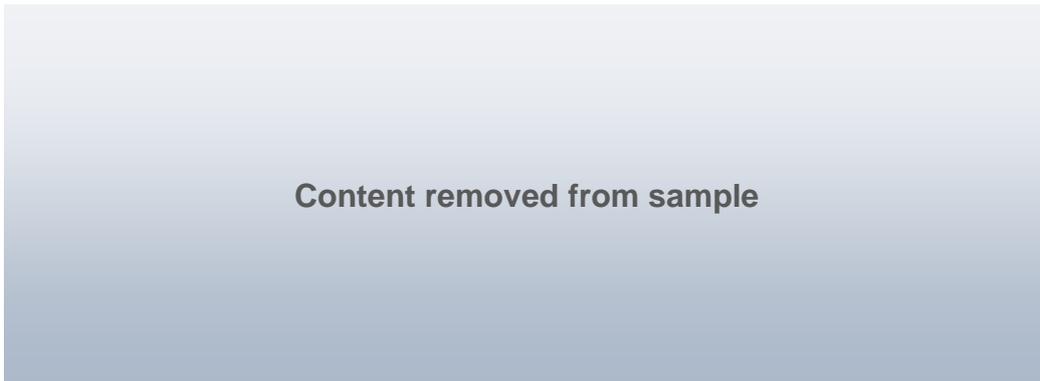
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### Retailing developments

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### What next for fresh food?

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**MARKET DATA**

**Table 14** Total Sales of Fresh Food by Category: Total Volume 2018-2023

'000 tonnes	2018	2019	2020	2021	2022	2023
Fresh Food	Data removed from sample					
Eggs						
Fish and Seafood						
Fruits						
Meat						
Nuts						
Pulses						
Starchy Roots						
Sugar and Sweeteners						
Vegetables						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 15** Total Sales of Fresh Food by Category: % Total Volume Growth 2018-2023

% total volume growth	2022/23	2018-23 CAGR	2018/23 Total
Fresh Food	Data removed from sample		
Eggs			
Fish and Seafood			
Fruits			
Meat			
Nuts			
Pulses			
Starchy Roots			
Sugar and Sweeteners			
Vegetables			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 16** Retail Sales of Fresh Food by Category: Volume 2018-2023

'000 tonnes	2018	2019	2020	2021	2022	2023
Fresh Food	<b>Data removed from sample</b>					
Eggs						
Fish and Seafood						
Fruits						
Meat						
Nuts						
Pulses						
Starchy Roots						
Sugar and Sweeteners						
Vegetables						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 17 Retail Sales of Fresh Food by Category: % Volume Growth 2018-2023**

% volume growth	2022/23	2018-23 CAGR	2018/23 Total
Fresh Food	<b>Data removed from sample</b>		
Eggs			
Fish and Seafood			
Fruits			
Meat			
Nuts			
Pulses			
Starchy Roots			
Sugar and Sweeteners			
Vegetables			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 18 Retail Sales of Fresh Food by Category: Value 2018-2023**

EUR million	2018	2019	2020	2021	2022	2023
Fresh Food	<b>Data removed from sample</b>					
Eggs						
Fish and Seafood						
Fruits						
Meat						
Nuts						
Pulses						
Starchy Roots						
Sugar and Sweeteners						
Vegetables						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 19 Retail Sales of Fresh Food by Category: % Value Growth 2018-2023**

% current value growth

	2022/23	2018-23 CAGR	2018/23 Total
Fresh Food	<b>Data removed from sample</b>		
Eggs			
Fish and Seafood			
Fruits			
Meat			
Nuts			
Pulses			
Starchy Roots			
Sugar and Sweeteners			
Vegetables			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 20 Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2018-2023**

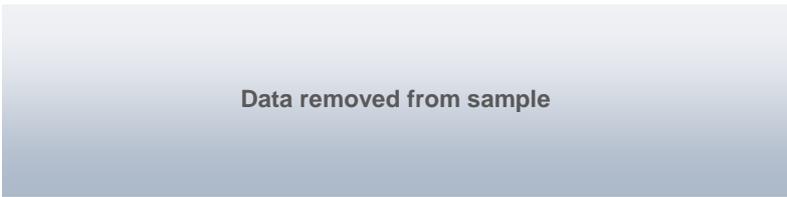
% retail volume	2018	2019	2020	2021	2022	2023
Packaged	<b>Data removed from sample</b>					
Unpackaged						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 21 Retail Distribution of Fresh Food by Format: % Volume 2018-2023**

% retail volume	2018	2019	2020	2021	2022	2023
Retail Channels	<b>Data removed from sample</b>					
- Retail Offline						
-- Grocery Retailers						
--- Convenience Retail						
---- Convenience Stores						
---- Forecourt Retailers						
--- Discounters						
--- Hypermarkets						
--- Supermarkets						
--- Warehouse Clubs						
--- Food/drink/tobacco specialists						
--- Small Local Grocers						
-- Non-Grocery Retailers						
--- General Merchandise Stores						
--- Apparel and Footwear Specialists						
--- Appliances and Electronics Specialists						
--- Home Products Specialists						
--- Health and Beauty Specialists						
--- Leisure and Personal Goods						

- Specialists
- Other Non-Grocery Retailers
- Direct Selling
- Vending
- Retail E-Commerce
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 22 Forecast Total Sales of Fresh Food by Category: Total Volume 2023-2028**

'000 tonnes	2023	2024	2025	2026	2027	2028
Fresh Food	Data removed from sample					
Eggs						
Fish and Seafood						
Fruits						
Meat						
Nuts						
Pulses						
Starchy Roots						
Sugar and Sweeteners						
Vegetables						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 23 Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2023-2028**

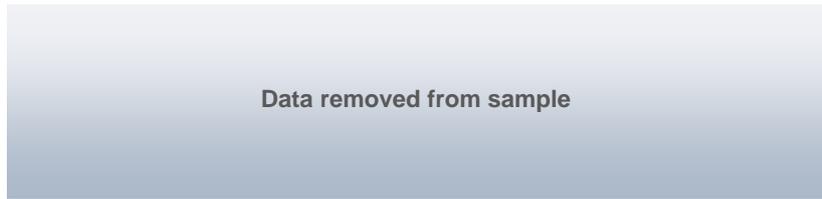
% total volume growth	2023/24	2023-28 CAGR	2023/28 Total
Fresh Food	Data removed from sample		
Eggs			
Fish and Seafood			
Fruits			
Meat			
Nuts			
Pulses			
Starchy Roots			
Sugar and Sweeteners			
Vegetables			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 24 Forecast Retail Sales of Fresh Food by Category: Volume 2023-2028**

'000 tonnes	2023	2024	2025	2026	2027	2028
Fresh Food	Data removed from sample					
Eggs						
Fish and Seafood						

Fruits  
Meat  
Nuts  
Pulses  
Starchy Roots  
Sugar and Sweeteners  
Vegetables



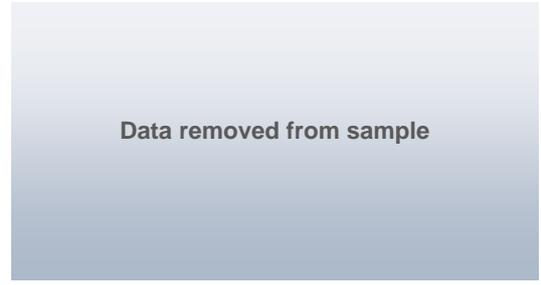
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 25 Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2023-2028**

% volume growth

2023/24      2023-28 CAGR      2023/28 Total

Fresh Food  
Eggs  
Fish and Seafood  
Fruits  
Meat  
Nuts  
Pulses  
Starchy Roots  
Sugar and Sweeteners  
Vegetables



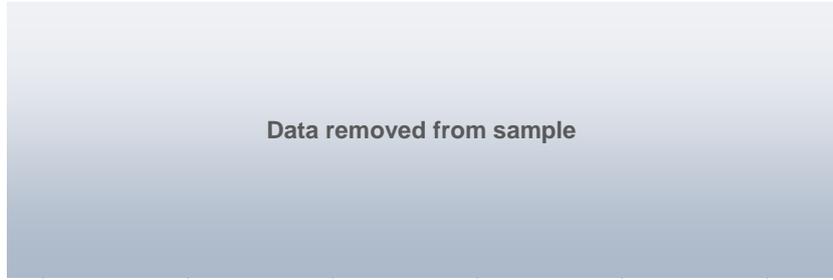
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 26 Forecast Retail Sales of Fresh Food by Category: Value 2023-2028**

EUR million

2023      2024      2025      2026      2027      2028

Fresh Food  
Eggs  
Fish and Seafood  
Fruits  
Meat  
Nuts  
Pulses  
Starchy Roots  
Sugar and Sweeteners  
Vegetables



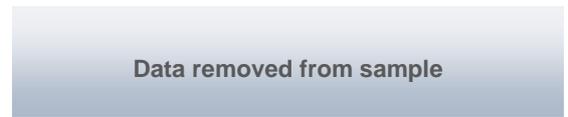
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 27 Forecast Retail Sales of Fresh Food by Category: % Value Growth 2023-2028**

% constant value growth

2023/2024      2023-28 CAGR      2023/28 Total

Fresh Food  
Eggs  
Fish and Seafood  
Fruits



Meat  
Nuts  
Pulses  
Starchy Roots  
Sugar and Sweeteners  
Vegetables

**Data removed from sample**

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

### DISCLAIMER

Forecast closing date: 6 November 2023

Report closing date: 22 March 2024

Analysis and data in this report give full consideration to consumer behaviour and market performance in 2023 and beyond as of the dates above. For the very latest insight on this industry and consumer behaviour, at both global and national level, readers can access strategic analysis and updates on [www.euromonitor.com](http://www.euromonitor.com) and via the Passport system, where new content is being added on a systematic basis.

### SOURCES

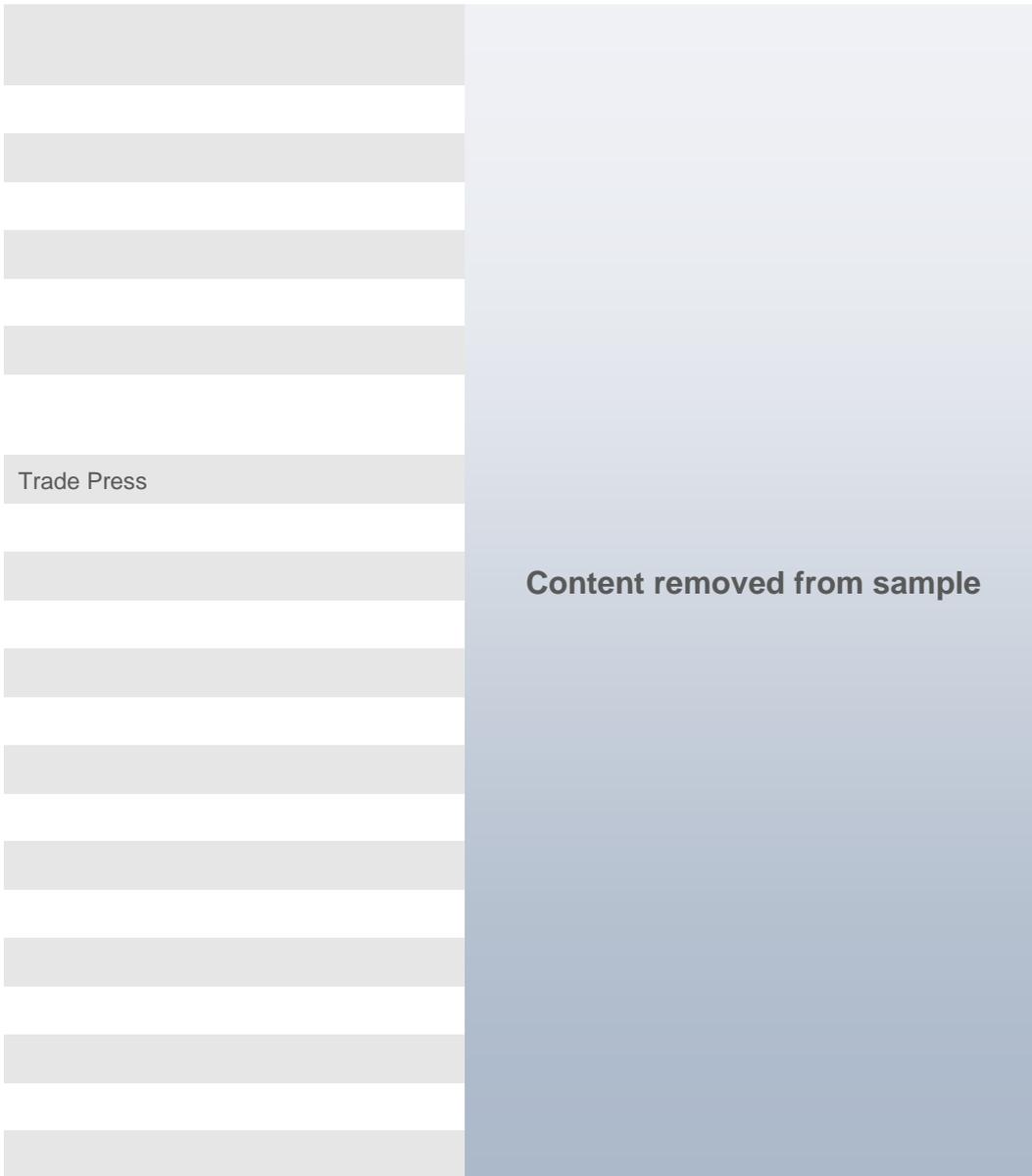
Sources used during the research included the following:

#### Summary 2 Research Sources

Official Sources	
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Trade Associations





Source: Euromonitor International