Euromonitor International

Staple Foods in Germany

November 2025

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Staple Foods in Germany

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

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E-commerce maintains significant growth

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KEY DATA FINDINGS

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Essential status supports continued demand despite economic challenges

INDUSTRY PERFORMANCE

Value holds up as discounters and bake-off lead
Unpackaged bread sales boosted by discounters' expansion

WHAT'S NEXT?

Bread and rolls remain everyday staples
Healthier choices rise with whole grain, fibre and simpler recipes
Greener packs and smarter baking cut waste and keep shelves fresh

COMPETITIVE LANDSCAPE

Aldi leads in baked goods, while Harry-Brot remains the number one brand manufacturer
Private label performing well

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Budget consciousness influencing purchasing patterns

INDUSTRY PERFORMANCE

Shelf gaps and price fights temper rebound
Health and wellness driving growth

WHAT'S NEXT?

Modest growth ahead as shoppers trade down but trade up on health
Protein, fibre, and clean labels redefine breakfast
Sourcing and packaging upgrades reshape the category

COMPETITIVE LANDSCAPE

Leaders gain share
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KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumers appreciate convenience and affordability

INDUSTRY PERFORMANCE

Private label gains as shoppers choose quick, low-waste options
Frozen processed vegetables sees dynamic growth

WHAT'S NEXT?

Modest growth ahead as frozen veg and pantry staples anchor weekly cooking
Healthier, simpler choices, including beans, plain veg and lower-sugar fruit
Packaging progress and smarter logistics cut waste and build trust

COMPETITIVE LANDSCAPE

Trusted frozen and potato brands stay visible with easy formats
Practicality, convenience and affordability

CHANNELS

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KEY DATA FINDINGS

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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

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Rising interest in convenience and freshness

INDUSTRY PERFORMANCE

Social media driven noodles power a category uptick

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WHAT'S NEXT?

Convenience and health tilt the category upward despite near-term pressure

Protein and vegan-positioned lines may move from niche to mainstream

Social commerce and viral noodle trends fuel youth-driven growth

COMPETITIVE LANDSCAPE

Barilla remains the leader but comes under increasing private label pressure
Hilcona creating new consumption occasions for chilled gnocchi

CHANNELS

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