

# ATTITUDES TOWARDS COOKING IN THE HOME – GERMANY – 2022

Healthy eating, convenience, skill development and connecting people through food are key areas for brands to explore as home cooking becomes more popular.



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# Attitudes Towards Cooking In The Home - Germany - 2022

## This report looks at the following areas:

- Market drivers for cooking in the home
- The impact of COVID-19 on home cooking behaviours
- Types of meals prepared and frequency of consumption
- Key reasons for cooking meals from scratch or semi-scratch
- Interest in home cooking features and approaches
- Behaviours and attitudes related to cooking in the home
- Recent product launch activity and market opportunities for 2022



Healthy eating, convenience, skill development and connecting people through food are key areas for brands to explore as home cooking becomes more popular.

## Overview

**Scratch cooking plays a major role in Germany** with **52% of home cooks** mostly cooking from scratch. It is considered enjoyable as it allows meals to be healthier and/or tailored to personal preferences. **37% of German home cooks** expect to be **cooking more from scratch post-COVID-19**, making this a major opportunity.

More time spent at home due to COVID-19 resulted in **more Germans\* cooking meals from scratch mostly/all of the time compared to pre-COVID-19\***. **38% of Germans** still feel

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uncomfortable going to restaurants and an expected increase in **flexible working/studying models** is likely to result in **less foodservice engagement and more at home cooking**.

**Social media's role in providing recipe inspiration and improving cooking skills is growing significantly.** 16-34 year old consumers are a new generation of 'digital home cooks' with **80% of 16-24 year olds and 65% of 25-34 year olds** getting inspiration from social media. Brands can enter this space to **secure a long-term competitive edge**.

69% of home cooks agree that **scratch-cooked meals are healthier; weight management is a priority** for **47% of Germans\*** and convenient scratch cooking aids that encourage quick, **healthy eating** have potential with **38% of Germans who eat unhealthily for being in a rush**. Moreover, cooking products that equip home cooks with the right tools to make plant-based dishes warrant attention.

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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview

### The impact of COVID-19 on in-home cooking

- Short, medium and long term impact of COVID-19 on cooking in the home
- COVID-19's impact on cooking in the home and German consumer behaviour

### Market context

- Scratch cooking has gained momentum since the COVID-19 outbreak
- Aspirations for healthy eating result in a strong tailwind for scratch/semi-scratch home cooking

### Mintel predicts

- More flexible working/studying will give cooking at home a long-term boost
- Digitalisation will push home cooks online for inspiration and upskilling, enabling more personalised cooking experiences

### Opportunities

- Appeal to health-conscious home cooks with cooking products that rapidly deliver nutrition
- Support home cooks with cooking aids, recipes and inspiration to cook more plant-based dishes
- Home cooking brands can empower those who are struggling emotionally and financially
  - Graph 1: consumers who cook from scratch/semi-scratch because they enjoy cooking, by household size, 2021
- Encourage easy entry into world cuisines through novel and convenient concepts
- Upskill both cooking novices and foodies to upgrade their life skills further
- Quick download resources

## MARKET DRIVERS

- COVID-19: market context
- The impact of COVID-19 on the German economy
  - Graph 2: key economic data, in real terms, 2019-23
- In the short to medium term, a struggling Horeca sector causes consumers to cook more at home
- Few Germans eat out or order takeaways multiple times a week
- The equilibrium shift between being at home and out-of-home will increase home cooking long term
- Healthier lifestyle aspirations driven by COVID-19 will give scratch cooking a boost
- Squeezed incomes could push German consumers to more affordable DIY at-home cooking products
- Digitalisation is democratising access to educational cooking resources and recipes

## WHAT CONSUMERS WANT AND WHY

### Types of meals prepared and the frequency of cooking from scratch

- Scratch cooking plays a central role in Germans' meal occasions
  - Graph 3: type of meal prepared most often for lunch and/or dinner in households, 2021
- Those over 55 mostly cook from scratch, while 16-24 year olds are more comfortable with semi-scratch solutions
  - Graph 4: type of meal prepared most often for lunch and/or dinner in households, by age group, 2021
- A majority of Germans cook from scratch all or most of the time
  - Graph 5: frequency of cooking meals from scratch\*, 2021 vs 2019

### Reasons for cooking meals from scratch or semi-scratch

- Health is the key reason why Germans cook from scratch
  - Graph 6: reasons for cooking from scratch or semi-scratch, 2021
- Cooking products that facilitate weight management can shine during the pandemic
- Appeal to 16-34 year olds with flavoursome side dishes and condiments that instantly instill nutrients into meals
- Build health cues into your cooking products to appeal to health-conscious Germans
- Equip home cooks with the right tools and ideas to make plant-based dishes worth cooking
- Add depth to plant-based dishes with umami and world flavours to compensate for flavour shortfalls
- Reach the young with plant-based products who drive demand for grocery items that cater to special dietary needs
  - Graph 7: consumers who cook from scratch or semi-scratch to meet special dietary needs, by age group, 2021
- Build familiarity into plant-based foods by using the right communication techniques
- Encourage experimentation and variety for those who enjoy cooking
- Develop product ranges with more sophisticated ingredients that appeal to experienced foodies who enjoy cooking
- Educational experiences for those who enjoy cooking and seek to upskill warrant attention
- Explore semi-personalised cooking solutions in-store
- ...and hyper individualised D2C cooking solutions online
- Food can play a bigger role in reconnecting people amid the loneliness epidemic and bring joy to those living alone
  - Graph 8: consumers who cook from scratch/semi-scratch because they enjoy cooking, by household size, 2021
- Home cooking brands can provide a sense of escapism with entertainment to consumers who feel isolated

### Behaviours related to cooking in the home

- Seasonal ingredients are favoured among German consumers
  - Graph 9: behaviours related to cooking in the home, 2021
- Celebrate seasonal, local ingredients and heirloom varieties to win over eco-conscious Germans
- Cater to those who plan ahead to get more bang for their buck
- Target home cooks under financial strain with relevant home cooking products
  - Graph 10: consumers who cook from scratch or semi-scratch to save money, by financial situation, 2021
- Encourage trial and error for those on restricted budgets who aspire to eat better-quality food

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- SimplyCook is suitable for smaller households who want to batch cook and budget
- Make speed and convenience key elements of your value proposition
- Shelf-stable kits that ease the 'burden' of cooking creatively have more potential in Germany
- Simplified meals can resonate with those who plan ahead and have busy schedules

### Interest in home cooking features and approaches

- The next generation of home cooks will be more reliant on social media for recipe inspiration than any others
  - Graph 11: interest in home cooking features and approaches, 2021
- Create recipe video content for social media to remain relevant to 16-34 year olds
  - Graph 12: interest in watching recipe videos on social media, by age group, 2021
- Tailor social media videos to health goals to target audiences
- Build a strong social media presence to engage, upskill and inspire home cooks aged 16-34
- Encourage easy entry into emerging world cuisines through convenient cooking products
- Introducing Germans to less-common world cuisines that are of interest holds potential
- Leverage seasonings and spices as a route of entry to emerging world cuisines
  - Graph 13: consumption of selected world cuisine products in the last three months, 2021
- Use storytelling to immerse home cooks in emerging world cuisines
- Bring the takeaway experience to the home with 'fakeaway' cooking products
- Do-it-yourself products can elevate home cooking to a more engaging and memorable experience

### Attitudes towards cooking in the home

- Home cooking is more than just nourishment to consumers; it is a way to demonstrate a lifestyle
  - Graph 14: attitudes towards cooking in the home, 2021
- Address intrinsic needs for self-expression and status through home cooking products
- Conscious consumption is driving home cooking brands towards environmentally friendly options
- Good-for-me and -good-for-the planet can be a key proposition for cooking brands

## LAUNCH ACTIVITY AND INNOVATION

- Home cooks are driving demand for spice mixes
  - Graph 15: NPD in selected home cooking products and aids\*, % of share by category, 2017-21
- Just Spices shake up the home cooking category, targeting cooking novices and new occasions...
- ...as do other spice startups, launching spices for popular dishes, while encouraging flavour trial
- German D2C recipe box customers favour familiar flavours
- The sauces category proves that the Italian cuisine remains highly popular among German home cooks
  - Graph 16: cooking and pasta sauce launches, by flavours (including blends), 2021
- Fresh and convenient pasta is conquering the German market
- Fresh pasta sales grew significantly during the COVID-19 pandemic
  - Graph 17: pasta retail market segmentation, by value (€m), 2017-20

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- Graph 18: pasta retail market segmentation, by volume (000 tonnes), 2017-20
- Premium cooking ingredients are gaining further momentum amid increased home cooking
- The increased home cooking trend during COVID-19 boosted Thermomix's market presence further
- In the quest for quality, organic cooking sauces remain popular with Germans
  - Graph 19: cooking and pasta sauce launches, by selected claim, 2017 vs 2021
- Tress Brüder stands out with a focus on the environment
- Recipe box market leader HelloFresh builds an 'eco halo' around its brand
- Changing environmental and health priorities push plant-based proteins to the centre of the plate
- Market heavyweights launch their own versions of plant-based cooking creams
- Plant-based claims catch up rapidly in home cooking products
  - Graph 20: selected cooking product launches (excluding meat and poultry)\*, by vegan, vegetarian and plant-based claim, 2017-21
- Side dishes are becoming more tailored to a healthier and plant-rich diet
- Cooking categories are less focused than other foods on health-related claims
  - Graph 21: selected cooking product launches\*, by health-related claim categories, 2017-21
- In a bid to retain customers, producers of animal proteins make quality promises and use new cuts
- German meat, poultry and fish producers shift their focus further from quantity to quality
  - Graph 22: meat, poultry and fish product launches, by ethical and organic claims, 2017-21
- Launch activity for meal kits and prepared meals in the retail space has more room to grow
  - Graph 23: prepared meal and meal kit launches as a % of total meal & meal centre NPD, 2017-21
- Meal kit and prepared meal brands target ethnic and street food flavours

## Advertising and marketing activity

- The Rana pasta sets promise Giovanni Rana's best pasta recipes
- Just Spices promote short healthy recipe videos on TikTok
- HelloFresh highlight versatility and convenience in TV ads
- Dr. Oetker demonstrate that the vegan dairy alternative and original crème fraîche are interchangeable

## APPENDIX

### Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- CHAID Analysis
- A note on language

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