

# ATTITUDES TOWARDS HEALTHY EATING AND DRINKING – GERMANY – 2022

A growing focus on holistic health is shifting the market towards better-for-you (BFY) food/drink that address long-term physical, mental and planetary health.



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# Attitudes Towards Healthy Eating And Drinking - Germany - 2022

## This report looks at the following areas:

- Market drivers for healthy eating/drinking
- The impact of COVID-19 on healthy eating/drinking
- Frequency of eating/drinking healthily and main sources for advice
- Health benefits people would ideally like from their diet
- Preferred categories for functional health benefits
- Behaviours and attitudes related to healthy eating/drinking
- Recent product launch activity and market opportunities for 2022



A growing focus on holistic health is shifting the market towards better-for-you (BFY) food/drink that address long-term physical, mental and planetary health.

## Overview

66% of Germans try to eat/drink healthily all or most of the time, yet **67% of men and 53% of women** in Germany are overweight. This **paradox** is partly driven by a reliance on few and differing sources of dietary advice, leading to **varying levels of nutrition proficiency**. Moreover, the lack of on-pack transparency in some food/drink can lead to **confusion and misinformed dietary choices**.

**COVID-19 elevated the role of the diet for holistic health**, increasing the focus on weight management and immune, digestive and mental health. Products can **connect the dots**

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between such specific health factors and holistic health (eg the gut-brain axis) for a more **long-term preventative health approach**.

With **rising obesity levels** and health misinformation remaining a challenge, **brands can play a bigger role, alongside the government, in informing consumers**. Incorporating the Nutri-Score, using simple health cues on-pack and exploring new channels of communication (eg TikTok) can create **education touchpoints for credible information**.

Sustainable nutrition is one of the **most important diet trends of the decade**. A more conscious approach to consumption, coupled with government pressure, will drive demand for **plant-centric products**. Concepts that embed planetary health in their value proposition and encourage the consumption of more plants hold potential.

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## Report Content



### EXECUTIVE SUMMARY

#### Key issues covered in this Report

- Overview
- The five year outlook for healthy eating and drinking products

#### Market context

- A mismatch exists between overweight/obesity levels and healthy eating intentions
  - Graph 1: frequency of eating/drinking healthily, 2021
- COVID-19 emphasised the importance of holistic wellbeing

#### Mintel predicts

- Expect a long-term shift towards sustainable nutrition
- The Nutri-Score will raise the bar for nutritional transparency

#### Opportunities

- Become a touchpoint for nutrition information
- Promote sustainable nutrition through plant-based food and drink concepts
- Develop products for long-term immune health as consumers adapt to living with COVID-19
- Connect the dots between gut health and holistic health
- Help Germans get back into shape with convenient nutrition and satiating options
- Quick download resources

### MARKET DRIVERS

- German economy hit hard by COVID-19 disruptions
- Strong post-COVID-19 bounceback followed by a period of slower growth
  - Graph 2: key economic data, in real terms, 2019-23
- Rising inflation squeezes household incomes
- COVID-19 elevated concerns about physical and psychological wellbeing
- Obesity remains a major public health challenge in Germany
- The new coalition government plans to democratise access to sustainable nutrition
- Nutri-Score will ensure more nutritional transparency and informed decision making
- Growing number of over-65s will drive demand for healthy eating/drinking solutions
  - Graph 3: population, by age group, 2020-30
- Digitalisation exacerbates the mental health crisis and creates more access to health (mis)information



## WHAT CONSUMERS WANT AND WHY

### Frequency of eating/drinking healthily

- The majority of Germans try to eat/drink healthily most of the time
  - Graph 4: frequency of eating/drinking healthily, 2021
- Mindful eating and an active lifestyle are key concerns for the majority of Germans
  - Graph 5: key factors driving consumer behaviour around wellbeing\*, 2021
- Life stages impact the degree to which consumers seek out healthy diets
  - Graph 6: frequency of eating/drinking healthily, by age, 2021

### Main sources for healthy eating/drinking advice

- Friends and family are the most trusted source of information
  - Graph 7: main sources for seeking advice on healthy eating/drinking, 2021
- Use the Nutri-Score as the first information touchpoint to educate consumers around health
- The ways Germans seek out health information varies strongly
  - Graph 8: repertoire of sources of health advice chosen for healthy eating/drinking, by age, 2021
- Cut through the (mis)information overload to address confusion and mistrust
- Signal health cues and inform consumers with simple messages to build rapport
- Leverage social media to educate around healthy eating and provide inspiration
- Tailor social media videos to health goals
- Just Spices promotes short healthy recipe videos on TikTok

### Benefits people would ideally like from their diet

- Immune health, digestive health and weight management remain key health priorities
  - Graph 9: health benefits consumers ideally would like from their diet, 2021
- Target out-of-home work/study returners with immune-boosting concepts
- Take a long-term immune health approach and increase awareness of links to holistic health
- Take digestive health to the next level and put 'good gut' at the centre of your value proposition
- Increase awareness of the 'gut microbiome' as a cornerstone to holistic health
- Create gut-health associations with 'soft' and 'hard' associations and claims
- Fibre can become the 'next' protein amidst growing interest in gut health
- Help Germans get back into shape post-COVID-19
- Offer nutritious, yet speedy and convenient options
- Cooking products can help weight management with high-satiety features
- Pre-portioned BFY snack formats that encourage self-control have potential with at-home snackers
- Tap into the trend for intermittent fasting

## Preferred categories for functional health benefits

- Yogurt, hot drinks, fruit juices are most sought after for functional health benefits
  - Graph 10: preferred categories for functional health benefits, 2021
- Match the right functional health benefit and category with the right customer
- Pair functional health benefits with fundamental purchase drivers linked to health
  - Graph 11: top factors when shopping for food, 2021\*
- Continue to innovate around sugar reduction in sweet categories

## Behaviours regarding healthy eating/drinking

- Being 'good for me and good for the planet' is high on consumers' agendas
  - Graph 12: behaviours regarding healthy eating/drinking, 2021
- Interlink personal and planetary health as part of your value proposition
- Embed sustainable nutrition in your brand identity to remain competitive in the long term
- Democratise access to eco-friendly and healthy food/drink options for the mass market
- Integrate hyperlocalism into your product offering
- Shift carbon neutrality up in consumers' environmental priority list to address planetary health
  - Graph 13: important ethical and environmental factors when making food and drink choices, 2021\*
- Encourage plant-based dieting by targeting a wider audience of flexitarians with the right tools and rhetoric
- Develop plant-based products that conveniently instil positive nutrition and flavour into dishes
- Address concerns about nutrient shortfalls in plant-based categories
- Build a 'clean health halo' with natural functional health ingredients to entice distrusting consumers
- Help to address 'unnatural' 21st century health issues with natural health ingredients

## Attitudes towards healthy eating/drinking

- Treat mental health as a key pillar of long-term holistic wellbeing
  - Graph 14: attitudes towards healthy eating/drinking, 2021
- Tackle the stigma of mental health and connect people through food
- Leverage ingredient connotations and cues to address emotional wellbeing needs
- Target young consumers with snacks that nourish the soul
  - Graph 15: selected reasons for snacking, by age group, 2021
- Modernise BFY comfort foods to strike a balance between health and indulgence
- BFY products must excel both in their health and taste credentials to compete
- Develop hybrid products that connect less healthy and healthy food categories
- Germans are increasingly receptive to personalised nutrition concepts amidst a growing D2C channel
- Aim personalised diet plans at the under-35s
  - Graph 16: interest in/past usage of personalised food/drink concepts, 2021\*
- Explore semi-personalised solutions in-store...
- ...and more individualised D2C solutions online

## LAUNCH ACTIVITY AND INNOVATION

- Vegan/vegetarian, free-from and macronutrient claims prevail in the German market
  - Graph 17: food and drink launches, by top 15 selected health claims, 2021
- BFY launches gain prominence in traditionally less healthy categories
  - Graph 18: food and drink launches with minus, plus, functional and free-from claims, by top 10 categories, 2021
- High-protein claims are used more often in indulgent categories to boost health credentials
- 'Added sugar' remains the key foe in sweet categories
- Germans are increasingly open to low-ABV beverages, with major breweries launching alcohol-free alternatives
- The Nutri-Score is being rapidly adopted in the German market
  - Graph 19: % of total food and drink launches with Nutri-Score labelling, 2018-21
  - Graph 20: food and drink launches with the Nutri-Score, by category, 2021
- Industry heavyweights reveal the truth about their products' health credentials with the Nutri-Score
- Functional health claims are emerging, albeit from a small base
  - Graph 21: food and drink launches, by selected fast-growing health claims, top 10 by sample size, 2017 vs 2021
- Mainstream brands experiment with natural plant-based functional ingredients
- Immune system claims grew amidst COVID-19 concerns
- Well-established German brands and retailers' own brands entered the 'immune health' space
- Plant-based claims are catching up with vegan launches
  - Graph 22: food and drink launches with vegan, vegetarian and plant-based claims, 2017-21
- Changing environmental and health priorities push plant-based proteins to the centre of the plate
- Traditionally 'less healthy' categories substitute base ingredients with legumes to promote BFY qualities and conscious consumption
- Oats become the sustainable nutrition hero ingredient of 2021
- Sauce and seasoning brands capitalise on the increasing vegetable intake of Germans
- Organic prevails as the most common natural claim in food and drink launches
  - Graph 23: food and drink launches with natural claims, 2021
- Brands use 'natural' credentials to instil health and high-quality associations into products
- Wholefoods such as wholegrains, seeds, nuts and kernels are on trend

## Advertising and marketing activity

- The BMEL introduces the Nutri-Score
- The MOVE campaign is promoted to German children/teenagers on social media (eg TikTok, Instagram)
- Lorenz, a major snacking player, chooses the route of transparency with the Nutri-Score
- Danone's ACTIVIA claims your stomach is the centre of your health
- Eckes-Granini's hohes C Super Shot for 'your strongest you'
- Lindt HELLO Vegan targets vegans with its oat-based chocolate

## 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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