

# ATTITUDES TOWARDS HEALTHY EATING AND DRINKING – GERMANY – 2023

The market continues to advocate tailored BFY offerings; celebrating functional ingredients, positioning food 'as medicine' for both mental and physical health.



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# Attitudes Towards Healthy Eating And Drinking – Germany – 2023

## This report looks at the following areas:

- Market drivers for healthy eating and drinking, including the impact of inflation/supply chain issues
- The knock-on effects of COVID-19 and health, awareness of a good diet equating to good health, rising obesity levels and foods developed to help 'boost' one's mood
- How frequently consumers say they eat healthily
- Which categories would benefit or suffer if consumers had less money to spend on food/drink
- Behaviours and attitudes related to food/drink and healthy eating/drinking, including the impact of financial concerns
- Consumer interest in trying functional foods that support specific ailments, from joint health to mental focus
- Recent product launch activity and market opportunities for 2023-24



The market continues to advocate tailored BFY offerings; celebrating functional ingredients, positioning food 'as medicine' for both mental and physical health.

## Overview

66% of Germans claim to try to eat/drink healthily all or most of the time. While this is positive, it conflicts with the ~54% of Germans who are overweight or obese. This **paradox** is driven by numerous factors from **lack of education** to **accessibility surrounding nutritious foods**. However, **cost is also major factor**; 55% of Germans say **financial concerns are more important to them than weight management**.

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Eating healthily shows a bias towards women, especially aged 65+. Men aged 45-64 are of most concern as 15% rarely/never try to eat healthily (vs 6% of women). It is crucial that food/drink brands feature older male influencers in healthy eating messaging to resonate with them.

Mental health understanding and **mood foods** see increasing uptake following the stresses of the pandemic. Brands are tapping into the '**mindful movement**'. to appeal to people feeling exhausted by everyday life. **47% and 40% of Germans** are interested in trying food/drink that supports **better sleep and relaxation**, respectively, peaking among 16-34s .

NPD is supporting specific health needs, with **functional foods delivering on tailored and personalised health**. In an ageing population there is a shifting movement to **anti-ageism**, and meeting the needs of the **elderly**, alongside healthy ageing for all life-stages (infant to senior).

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## Report Content

### EXECUTIVE SUMMARY

#### Key issues covered in this Report

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

#### Market context

- Mismatch between overweight/obesity levels and healthy eating intentions remains apparent
- Consumers want to be more in charge of their health, avoiding ultra-processed foods
- When the economy drops, affordable nutrition must take priority to aid those in need
  - Graph 1: agreement with statements around Value (describes me somewhat/very well)\*, 2022
- Democratising healthy food and advocacy of a plant-based diet
- Increasing mental wellness and fatigue-led conversations are occurring

#### Mintel predicts

- Mintel's perspective sees four pillars of growing interest in the health space
- Nutrition to go hand-in-hand with sustainability
- Tailored and personalised nutrition is on the up, as 'food as medicine' is a growing notion
- Accessible nutrition for all
- Consumers are living busier lives, seeking satiating eats

#### Opportunities

- Budget-friendly and nutritious products are needed for all
- Target men more overtly in marketing messages
  - Graph 2: consumers who eat/drink healthily all or most of the time, by age within gender, 2023
- Plant-based 2.0 using future tech, targeting flexitarians and Gen Z consumers
- Anti-ageism, starting prevention early with positive nutrition
- Plant power for digestive wellness...
- ...and the gut-brain-axis connection
- 'Diluted-down biohacking' with optimal hydration
- Help consumers address weight gain
- Comfort foods as pick-me-ups during financial hardship

### MARKET DRIVERS

#### The German economy

- The German economy slips into a technical recession

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- Graph 3: key economic data, in real terms, 2019-24
- Inflation remains the key concern in 2023 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure
- When the economy drops, affordable nutrition must take priority to aid those in need
  - Graph 4: agreement with statements around Value (describes me somewhat/very well)\*, 2022

## Health issues of Germans

- COVID-19 has contributed to weight gain
- Those who are overweight are slipping into obesity
  - Graph 5: trends in body mass index (BMI), 1999-21
- BMEL tackle the obesity epidemic with health-centred strategies
- Changes lined up for Nutri-Score labelling scheme
- Anti-ageism: the ageing German population offers an opportunity for the elderly and major lifestyles
- Digitisation as a gateway to healthy eating advice and therapy
- Alcohol reduction trend drives innovation in low/no-alcohol alternatives
- Biohacking movement; optimal hydration
- Increasing mental wellness and fatigue-led conversations are occurring
- Which brands are reimagining the health space?
- Challenger start-ups and brands are innovating in new and exciting health territories

## Planetary health

- Healthy planet, healthy person
- Democratising healthy food and advocacy of a plant-based diet
- GMOs and gene-edited crops will be more nutritious

## WHAT CONSUMERS WANT AND WHY

### Frequency of eating/drinking healthily

- More women than men eat/drink healthy all or most of the time
  - Graph 6: frequency of eating/drinking healthy, 2021 vs 2023
- Lifestyle impacts the degree to which consumers seek out healthy diets
  - Graph 7: consumers eating/drinking healthily all or most of the time, by age, 2023
- Consumers are trying to eat/drink healthily – so what's holding them back?
- Living an active lifestyle and mindful eating remain as key concerns for Germans
  - Graph 8: key factors driving consumer behaviour around wellbeing (very well/somewhat describes me), by gender\*, 2022
- Health-focused education and promotion using social media to provide inspiration
- Health cues with simple messages

## Behaviours if less money is available to spend on food/drink

- Finances changing consumer needs
- Financial hardship could dampen snackable product sales
  - Graph 9: food and drink behaviours if having less money to spend, 2023
- Snack cutbacks to save the pennies, but NPD in health and satiety could counter this
- Convenience often comes with an increased price tag; NPD in meal for tonight part-prepared propositions
- Meat is seen in a negative light, due to increasing costs and health fears (red meat)
- Consumers can save money through satiating eats
- Reduced consumption of diet/light meals when budgets are tight
- Consumer shift to eating less foods with added health benefits to save money
- Fewer meals and skipping breakfast to save money may give rise to filling meal-replacement shakes
- Comfort foods as pick-me-ups during financial hardship
- Price hikes may see falling fresh fruit and vegetable consumption

## Behaviours regarding healthy eating/drinking

- Dietary behaviours see aversion to ultra-processed and GM produce
  - Graph 10: behaviours regarding healthy eating/drinking, 2023
- Brands encouraging healthy lifestyle choices are preferred
- Inspiration as to how eat healthily on a budget
- Supporting gut health is a popular notion
- Wider range of healthier choices needed
- Supermarkets promoting healthy swaps
- Guilt after consuming unhealthy foods/drinks
- Harness the young's openness to GMOs

## Functional food benefits consumers would be interested in trying

- Functional foods that promote a good nights sleep appeal to Germans
  - Graph 11: functional food attribute types that Germans would be interested in trying, 2023
- Better sleep, for both adult and child
- Relaxation cues are being featured in wellness beverages
- CBD and botanicals are common relaxers
- Anti-ageism with joint health-aiding products
- Products supporting brain-focus align to those seeking mental clarity
- Ingestible beauty launches make for improved skin health thanks to collagen and hydration
- Creative cognition – products supporting memory are emerging
- Eye health products are moving 'into sight'
- Vision supporting functional foods as an avenue for health-led NPD
- Products supporting vision, a global snapshot

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- Menstrual health products are tailored to female needs pre-/during/post-period
- Libido-centric offerings are niche in Germany, but seen further afield targeting men

## Attitudes towards healthy eating/drinking

- Plant variety as 'the spice of life' to support good gut health
  - Graph 12: attitudes towards health-led eating/drinking, 2023
- Plant-based eating aligns with seeking healthy diets
  - Graph 13: agreement that I try to eat healthily all or most of the time, by age within gender, 2023
  - Graph 14: agreement that eating a wide variety of different plants is important for gut health, by age within gender, 2023
- A variety of plants is important for good gut health
- In a post-COVID-19 world, consumers are looking to reset and 'boost' their mood
- Contemporary BFY treats can strike a balance between health and indulgence
- Rewe: a case study in 'health by stealth' reformulation
- Promote high-fibre and protein-rich foods for satiety
- Natural sugar alternatives offer clean appeal
- Perception of improved nutrition through good soil health
- Case study: D.B. Schmitt biodynamic wine
- Case study Ireland: Waterford organic whisky
- Low-carb diets to lose weight could make way for more keto and paleo propositions
- Snapshot of keto and low-carb offerings
- Retailers such as Aldi Süd are improving their product health credentials
- Are nutrition rating systems the best way of deciding how healthy a product is?

## LAUNCH ACTIVITY AND INNOVATION

### Rise of plant-based NPD

- Plant-based claims to steadily catch-up with vegan launches across food/drink
  - Graph 15: food and drink launches with vegan, vegetarian or plant-based claims, 2018-23
- Mainstream brands continue to experiment with natural plant-based functional ingredients
- Animal free innovation, from precision fermentation to plant-based 'fibre tech'
- Making room for fermented mushroom-based plant products

### BFY launches

- BFY launches continue to gain prominence in traditionally less healthy snacking category
  - Graph 16: food and drink launches with minus, plus, functional and free-from claims, by top 10 categories, 2021-23
- Health-led NPD in snacking, from low sugar to reduced fat – thanks to oven roasting
- BFY baby/infant foods with vegetable inclusions
- Postpartum foods as an expansion from the baby food category – DTC brand Mama Muun delivers nourishing foods

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- Jarred sauces tout 'no added sugar'
- Breakfast cereals are offering notable health benefits
- Nutri-Score labelling is being adopted more rapidly in food than drinks
  - Graph 17: % of total food and drink launches with Nutri-Score labelling, 2018-23
- The Nutri-Score continues to be rapidly adopted in the German market
  - Graph 18: share of food and drink launches with the Nutri-Score, by top 10 categories in 2023, 2021-23
- Big brands continue to break health misconceptions with their high Nutri-Scores

## Functional health

- Functional beverages tap into multiple consumer needs
- 'Optimal hydration' – a movement to watch within beverages
- 'Stress & sleep' features mainly in herbal teas
- Food launches with bone health claiming are niche, but could be a market gap for the ageing consumer
- Collagen beverages spotted in Europe
- Hormonal health products supporting menopause, andropause and PMS symptoms are appearing
- Immune system claims fall in line with declining severity of COVID-19 concerns

## Holistic health through naturalness

- Healthy eaters seek out natural foods
- Natural claims, including organic, resonate with Germans
  - Graph 19: food and drink launches with natural claims, 2021-23
- Natural and organic credentials instil health and high-quality appeal into products
- Followfood: regenerative agricultural practices are being spotted in German retail
- Whole grains are associated with a host of health benefits
- Germans are increasingly open to low-ABV beverages, with NPD launches beyond beer and wine

## Advertising and marketing activity

- Draw inspiration from Vly's 'It's a start'
- Dr. Oetker announces its range of high protein products
- Large German wine producers continues to invest in alcohol-free varieties
- Can organic also 'taste good' for the climate? Rewe encourages consumer #RETHINKING & switching
- Vegetables aren't boring!
- Activia promotes 'valuable fibre, full of taste' with its grain-rich yogurts
- Carrefour encourages gamers to play and win by eating healthily

## APPENDIX

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

- Products covered in this Report



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- Abbreviations
- Consumer research methodology
- A note on language

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