

BREAKFAST EATING HABITS – GERMANY – 2024

Flexible breakfast eating patterns require convenient on-the-go ready meals, multi-purpose breakfast snacks and satiating options to keep Germans full and satisfied.



Charlotte Sander,
Research Analyst



Breakfast Eating Habits – Germany – 2024

This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on breakfast eating habits, choice of foods eaten and location.
- Frequency of eating breakfast, with weekend breakfasts providing a chance to socialise but weekday-breakfasts being short on time.
- How breakfast products can align with Germans' busy mornings through convenience and on-the-go options.
- Foods eaten for breakfast, with baked goods remaining a firm favourite among Germans and healthy options also preferred.
- Product launch activity aimed at the breakfast (or brunch) occasion.



Flexible breakfast eating patterns require convenient on-the-go ready meals, multi-purpose breakfast snacks and satiating options to keep Germans full and satisfied.

Overview

Germans' busy lifestyles require **convenient and flexible weekday breakfast solutions to help them start their day energised and full**. By contrast, **weekend breakfasts are a relaxing and often social event**, even for those who typically skip breakfast.

With one in three out-of-home breakfast eaters eating while commuting, **on-the-go products and quick-to-prepare meals are up and coming**. Brands can tap into international examples of savoury ready meals or innovate in all-in-one breakfast drinks.

BUY THIS REPORT NOW


€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL



37% of German breakfast eaters tend to eat **multiple little snacks throughout the morning instead of having one big breakfast**, which creates opportunities for breakfast snacks that can serve as a bridge between breakfast and lunch. Breakfast cereals can be repurposed for snacking in the afternoon.

Highlighting satiety caters to 42% of breakfast eaters and can be accommodated with **a focus on gut health and fibre**. This also aligns with Germans' interest in **a healthy start to the day**.

Although bread remains the favourite breakfast item for Germans, **inflation is pushing them to buy own-labels** instead of bakery-made products. Highlighting value for money breakfast foods is crucial. **To highlight value, transparent ingredient communication** (eg via the Nutri-Score system) and suitability for breakfast/brunch or snacking occasions become key.

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

Report Content



EXECUTIVE SUMMARY

- The five year outlook for the breakfast category

Market context

- Most Germans eat breakfast, and mostly at home
 - Graph 1: frequency of eating breakfast in and out of home, 2023
- Inflation impacts the breakfast category

Mintel predicts

- Align healthy breakfasts with BMEL's recommendations
- Hybrid work patterns encourage flexible breakfast habits

Opportunities

- Provide options for nutrition on the move
- Create new ready meal breakfast formats
- Promote healthy and gut-friendly products
- Cater to snackers or breakfast avoiders with satiating options

MARKET DRIVERS

The German economy

- Economic recovery to follow the slowdown in 2023
 - Graph 2: key economic data, in real terms, 2019-25
- The inflation rate is slowly bouncing back to more conventional levels
- Inflation is still the key factor affecting consumers' finances...
- ...confidence and expenditure
 - Graph 3: financial confidence index, 2022 - 23
- The impact of the economy on the breakfast category
- COVID-19 and the current economic climate impacts the bakery industry...
 - Graph 4: total revenue of bakery businesses (€bn exc VAT), 2015-22
- ...as the number of local bakeries declines
 - Graph 5: number of bakery business outlets, 2015-22
- ALDI cooperates with local bakeries to sell bread

Population dynamics

- Despite high BMIs, Germans value healthy food options

Breakfast Eating Habits – Germany – 2024

- Graph 6: BMI of the 18+ population, 2021

- Hybrid working requires flexible breakfast options

Regulations

- BMEL releases regulations for healthier diets
- Return to 19% VAT on dining in restaurants

Healthy eating

- Promoting scratch-cooking for health benefits
- Cater to Germans' snacking habits
- Support efforts towards sustainable diets

WHAT CONSUMERS WANT AND WHY

Frequency of eating breakfast, who with and where

- Almost all Germans eat breakfast
 - Graph 7: consumers who eat breakfast, 2023
- Breakfast is mostly eaten at home
- Making breakfast a social start to the day
 - Graph 8: who breakfast is eaten with in and out of home, 2023
- Target sociable over-65s with special menus
 - Graph 9: who breakfast is eaten with out of home, by age group, 2023
- Time-pressed travellers eat on-the-go
 - Graph 10: locations where breakfast is eaten out of home, 2023
- On-the-go breakfast options are more sought-after

Foods eaten for breakfast

- Baked goods remain favourites, but inflation leaves marks
 - Graph 11: what consumers eat for breakfast in or out of home, 2023
- Bread is the front runner both in and out of home
 - Graph 12: foods eaten for breakfast, in vs out of home, 2023
- Women look for a healthy at-home breakfast
- Make eggs more convenient for eating out-of-home
- Increased demand for meal replacement drinks...
- ...creates opportunities for all-in-one breakfast drinks to go

Breakfast-related behaviours and interests

- Leisurely breakfasts are reserved for the weekend
 - Graph 13: behaviours and attitudes towards breakfast, 2023
- Bridging the gap between breakfast and lunch

Breakfast Eating Habits – Germany – 2024

- Position snacks for breakfast or other times of day
- Lack of time means people skip breakfast
 - Graph 14: reasons for skipping breakfast, 2023
- Gut health and savoury options have high appeal
- Promote gut health for an intact immune system
- Men go for quick fixes and ready meals
- Diversifying savoury products with breakfast labels

Preferred attributes related to breakfast intake

- Germans want healthy breakfast options
- Show Gen Z the importance of fibre
- Provide a protein-fuelled start to the day
- Filling options can discourage breakfast skipping
 - Graph 15: select preferred breakfast attributes (exc health-related), 2023
- Be transparent about sustainability

LAUNCH ACTIVITY AND INNOVATION

- Nutri-Score labelling guides healthy choices
 - Graph 16: breakfast/brunch product launches with nutri-score labelling vs all food* launches, 2021-23
- Brands pay attention to sugar content
 - Graph 17: breakfast/brunch product launches with no/low/reduced sugar/sugar free claims, 2019-23
- On-the-go claims for breakfast items are rising annually
 - Graph 18: breakfast/brunch product launches with on-the-go claim, 2015-23
- Promoting indulgent breakfast options
- Spicing up porridge and topping it off

Advertising and marketing activity

- Milram's porridge is ready to be eaten
- yfood promotes convenience
- Netto's perfect start to the day – with own-labels
- Nutella highlights bakeries

APPENDIX

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

- Products covered in this Report
- Abbreviations
- Consumer research methodology

Breakfast Eating Habits – Germany – 2024

- A note on language

About Mintel Reports: Germany

Access our reports now and get the most accurate, credible and powerful data, insights and analysis. Mintel Reports Germany gives you everything you need to know about what German consumers want and why.

In each report, we're analysing the market, new product innovations and the competitive landscape, as well as consumer behaviours across Germany. Our local analysts, supported by our team of global experts then translate it into what it means for you.

What makes us unique?

- ✔ A 360-degree view of German markets
- ✔ Experienced analysts based in Germany
- ✔ Expert-led support from global category experts

How Mintel Reports Germany will help your business grow:

01

Identify future opportunities by understanding what German consumers want and why

02

Make better decisions faster by keeping informed on what's happening across your market

03

See the trends and innovations impacting Germany both on a local and global level

BUY THIS REPORT NOW

€2600.00 | £2195.00 | \$2995.00*

store.mintel.com

Americas: +1 (312) 932 0400
China: +86 (21) 6032 7300
Germany: +49 (0) 211 3399 7411
India: +91 22 4445 1045
Singapore: +65 6653 3600
Thailand: +66 2 821 5122
UK: +44 (0) 20 7606 4533

*These prices are correct at time of publication, but are subject to change due to currency fluctuations.

MINTEL

Disclaimer

This is marketing intelligence published by Mintel. The consumer research exclusively commissioned by Mintel was conducted by a German licensed market survey agent ([See Research Methodology for more information](#)).

Terms and Conditions of use

Any use and/or copying of this document is subject to Mintel's standard terms and conditions, which are available at <http://www.mintel.com/terms>

If you have any questions regarding usage of this document please contact your account manager or call your local helpdesk.

Published by Mintel Group Ltd

www.mintel.com

Help desk

UK	+44 (0)20 7778 7155
US	+1 (312) 932 0600
Australia	+61 (0)2 8284 8100
China	+86 (21) 6386 6609
Germany	+49 211 2409023
India	+91 22 4090 7217
Japan	+81 (3) 6228 6595
Singapore	+65 (0)6 818 9850