For busy consumers, ready meals/meal kits offer crucial speed and comfort. Brands face competition from adjacent categories in the battle for utmost convenience.

Adam Millward, Research - Mintel Reports
For busy consumers, ready meals/meal kits offer crucial speed and comfort. Brands face competition from adjacent categories in the battle for utmost convenience.

84% of Germans use ready meals/meal kits, rising to 95% of 16-24s. Ready meals are eaten more regularly than in 2021, indicating that convenience trumps health for many Germans.

Under par crop harvests, adding to record inflation, have challenged the category. 75% of Germans have felt the effects of high food prices, causing 38% to cut back on non-essentials. Buyers favour storable varieties, eg frozen or ambient meals, for their durability, causing some meal kit brands to expand into ready options to maintain convenience.
As Germans return to commuter lifestyles, on-the-go meals are a key opportunity. Consumers are looking to make the most of their time, driving demand for niche launches, eg meals for specialised diets, fitness and family dinners. With 16-34s looking for utmost utility and efficiency from food, 'nutritionally complete' meal replacement drinks, eg Huel and Yfood, may pose a growing threat to the category.

With 50% of users interested in mix-and-match meals, customisation is likely to become a core opportunity in the next five years. Foodservice and retailers are employing AI to expedite delivery and increase options, while 25% of Germans* show interest in foods tailored to their dietary needs. With developments rapid, ready meal/meal kit brands must respond or risk losing share to faster, more-flexible competitors.
Report Content

Key issues covered in this Report
• Overview

EXECUTIVE SUMMARY
• The five year outlook for ready meals

Market context
- Graph 1: usage of different types of ready meals and meal kits, 2020 vs 2021 vs 2023
• With inflation persisting, ready meals slake consumers' taste for luxury
• BMEL tackles the obesity epidemic with health-centred strategies
• AI is a real threat to the ready meals/meal kit category

Mintel predicts
• High cost of living stalls volume sales, but value sales continue rapid rise
• Market size & forecast – ready meals
• Value sales forecast to grow by almost €600m by 2028

Opportunities
• Take cues from energy drinks' mass popularity with energy boosting dishes for 16-34 year-olds
• Broaden cooking types to include air fryer meals
• Ready meal brands must explore white space in 'nutritionally complete' claims
• Appeal to fitness fans with multi-meal bundles

The competitive landscape
• Own-labels are the runaway winners as consumers prioritise value and durability
  - Graph 2: company retail shares of ready meals/meal kits, by value and volume, 2022

MARKET DRIVERS

The German economy
- Graph 3: key economic data, in real terms, 2019-24
• Inflation slows down – but remains at a higher level
• Inflation is still the key factor affecting consumers' finances...
  - Graph 4: financial confidence index, 2022-23
• Inflation drives food costs ever higher, but ready meals can slake consumers' taste for luxury
Healthy eating
• Obesity levels shine a light on processed convenience foods
  - Graph 5: percentage of population overweight or obese, by age group, 2014 vs 2019
• Germans are cooking from scratch more often, presenting challenges for ready meal/meal kits

Environment and sustainability
• Sustainable packaging rises on government agenda as discussion on climate change hots up
• Meat-free eating features in government health and climate goals

Digitalisation
• AI sharpens delivery apps’ threat to ready meals/meal kits
• Social media drives trends in home cooking, creating opportunities for ready meals and meal kits

German lifestyles
• Ever-evolving working habits unlock possibilities for on-the-go occasion
• The German population is projected to age...
  - Graph 6: population structure by age, 2020-30
• ...meaning the category must offer options for over-65s

WHAT CONSUMERS WANT AND WHY

Usage frequency of ready meals and meal kits
• More than eight in 10 Germans eat ready meals
• Usage unwavering after the pandemic...
  - indicating that Germans view ready meals as a home comfort
  - Graph 7: usage of ready meal types in the last three months, by age, 2023
  - Graph 8: usage of ready meals/meal kits three or more times a week, by 16-24s, 2021 and 2023
  - Graph 9: ready meal/meal kit usage repertoire, 2023
  - Graph 10: ready meal and meal kit usage, by financial health, 2023
• Meal kits must be more flexible to broaden appeal

Usage occasions for ready meals and meal kits
  - Graph 11: use of any ready meals, by usage occasion, 2023
• Prepared meals need to power work and play for younger cohorts
  - Graph 12: usage of meal kits by usage occasion, 2023
• Carry the burden of lunchtime prep with hackable options
• Ready meal brands have scope to expand multi-portion options
• Part-prepared options provide the best of both worlds
Types of ready meals typically bought
- Graph 13: ready meals bought, by type, 2023
  - Broaden cooking methods to include air fryers
  - Chilled meals can stand out as a quality choice with freshness indicators
  - Give tips for improving prepared foods
  - Compete for the scratch cooking cohort with part-prepared options
  - Use jars to earn prominence as an easy lunch option
  - Jars can reassure consumers on quality and longevity

Desired qualities in ready meals/meal kits
- Graph 14: most important traits in a ready meal/meal kit eaten as dinner for two on weekends/days off, 2023
- Graph 15: most important traits in a ready meal/meal kit eaten on working days by themselves, 2023
- Graph 16: most important traits in a ready meal/meal kit eaten for family dinner on weekends/days off, 2023
  - Family dinners must suit parents’ and children’s nutritional needs...
  - ...meal kits can become part of family mealtime rituals

Traits signalling good value in ready meals
- Nutrition and satiety signal good value for money
- Brands must explore white space on nutritionally complete claims
- Nutri-Score is an easy win to prove nutritional benefits
- Push protein and fibre messages for satiating meals
- Integrate fruit components for five-a-day wins

Eating and buying behaviours related to ready meals
- Consumers want free-reign to make their own meals
  - Graph 17: eating and buying behaviours related to ready meals and meal kits, 2023
- Packaging innovation can help deliver varied meals
- Tap into food bowl trend to make to-go meals an experience
- Tailor ready meals to specific diets...
  - ...as well as appealing to fitness occasions

Attitudes towards ready meals
- Consumers seek indulgent options but not at the cost of health
  - Graph 18: attitudes related to ready meals and meal kits, 2023
- Give healthy meals a decadent twist
- Provide consumers a ‘safe adventure’ when trialling new cuisines
- Established appeal of spice brands can create winning world cuisine
- “Fakeaways” can boost at-home experience
LAUNCH ACTIVITY AND INNOVATION

- Graph 19: ready meal and meal kit launches, branded vs private label, 2021-23
  - Leading brand FRoSTA offers home-style comfort
  - Bofrost offers part-prepared meals to be hacked at home
  - Discounter launches offer accessible adventure
    - Graph 20: ready meal launches, by storage, 2021-23
    - Graph 21: ready meal and meal kit launches with environmentally friendly packaging claims, 2021-23
    - Graph 22: ready meal and meal kit launches, by natural claims, 2021-23
    - Graph 23: ready meal launches by vegan, vegetarian and ethical – animal claims, 2018-23
  - Vegan products aim for holistic sustainability
  - Meat-free meals make a fuss about protein content
  - Emerging ingredient: edamame
    - Graph 24: launches featuring a Nutri-Score, prepared meals vs all food, 2018-22

Advertising and marketing activity

- Iglo’s ‘Iss Bunter’ range lends itself to image-sharing platforms
- HelloFresh emphasises localism and sustainability aspects in behind-the-scenes look
- Prepmymeal proves there’s no time to lose in fast-paced ad

MARKET SHARE

Company retail market shares of prepared meals

- Market share in ready meals and meal kits
- High inflation precipitates price rises, but only FRoSTA and own-labels forge gains
- Own-labels make volume share gains as familiarity factors high in consumers’ buying choices

MARKET SIZE, SEGMENTATION AND FORECAST

- High cost of living stalls volume sales but cause increases in value sales
- Value sales forecast grow by almost €600m by 2028
- Volume sales expected to surpass 450m tonnes by 2028 after period of slow growth
- Frozen meals remain the mainstay of value sales
- Chilled meals are a modest winner in volume terms

APPENDIX

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

- Products covered in this Report
Ready Meals – Germany – 2023

• Abbreviations
• Consumer research methodology
• A note on language

Appendix – market size and central forecast methodology
• Forecast methodology
• Forecast methodology – fan chart
• Market size – ready meals – value
• Market size – ready meals – volume
• Market forecast and prediction intervals – ready meals – value
• Market forecast and prediction intervals – ready meals – volume
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