

READY MEALS – GERMANY – 2023

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



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- Mintel Reports



Ready Meals – Germany – 2023

This report looks at the following areas:

- Market drivers for ready meals and meal kits, including cost of living and the threat of AI
- Usage frequency, with 84% of Germans using ready meals
- Occasions for usage, including how to appeal to solo diners
- Buying frequency, with frozen and shelf-stable meals most often bought
- Traits consumers want in ready meals/meal kits, with complex dishes appealing to 41% of working-day users
- Value indicators in ready meals/meal kits, as consumers prioritise function and fullness
- Behaviours related to ready meals/meal kits, with 50% seeking customisable meals
- Attitudes related to ready meals/meal kits, including how to strike a balance between health and indulgence



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

Overview

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**.

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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.

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Report Content



EXECUTIVE SUMMARY

- The five year outlook for ready meals

Market context

- Eight in 10 Germans eat ready meals with usage unwavering after the pandemic
 - 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

- Stagnation follows a technical recession
 - 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...
- ...confidence and consumer expenditure
 - 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
- BMEL tackles the obesity epidemic with health-centred strategies
- 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 heats 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
- Younger consumers and men still eat prepared meals the most...
 - Graph 7: usage of ready meal types in the last three months, by age, 2023
- ...and now eat them more regularly
 - Graph 8: usage of ready meals/meal kits three or more times a week, by 16-24s, 2021 and 2023
- Consumers lean on multiple types of ready meal/meal kit
 - Graph 9: ready meal/meal kit usage repertoire, 2023
- Germans need convincing on meal kits
 - 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

- Ready meals/meal kits are typically eaten alone
 - Graph 11: use of any ready meals, by usage occasion, 2023

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- Prepared meals need to power work and play for younger cohorts
- Meal kits are eaten mostly on working days
 - 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

- Consumers buy durable options for rainy days
 - 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

- Premium and indulgent dishes tempt couples to eat at home
 - Graph 14: most important traits in a ready meal/meal kit eaten as dinner for two on weekends/days off, 2023
- Posh plates for at-home dinner dates
- Weeknight diners value home-cooked dishes
 - Graph 15: most important traits in a ready meal/meal kit eaten on working days by themselves, 2023
- Create slow-cooked experience in minutes
- Family dinners must suit parents and children alike
 - 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

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- Tap into food bowl trend to make to-go meals an experience
- Win sporadic office workers with mix and match meal deals
- 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
- Consumers seek indulgent options but not at the cost of health
- 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

- Little to divide private labels and brands in launches
 - 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
- Shelf-stable ready meals go from strength to strength
 - Graph 20: ready meal launches, by storage, 2021-23
- Brands can work harder to incorporate recyclable packaging
 - Graph 21: ready meal and meal kit launches with environmentally friendly packaging claims, 2021-23
- Packaging made from plant cellulose
- Farm to plate in one easy step
- HelloFresh bring ready meal brand to Europe
- All-natural claims are steadily growing...
 - Graph 22: ready meal and meal kit launches, by natural claims, 2021-23
- ...while vegan claims remain high
 - Graph 23: ready meal launches by vegan and vegetarian claims, 2018-23
- Vegan products aim for holistic sustainability
- Meat-free meals make a fuss about protein content
- Emerging ingredient: edamame
- Ready meals are ahead of the curve on the Nutri-Score
 - 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
- 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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