



GERMANY

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RETAIL HIGHLIGHTS

Concentration of the retail market rises: Edeka is strengthening its market share by taking over Kaiser's Tengelmann.

Discounters are trying to regain lost market shares by listing more and more brands/A-labels. Aldi announced the listing of close to 50 brands. Lidl recently sells itself as a Premium-retailer in TV and Aldi is setting up a new future-concept.

Upcoming Gastro-Trend: more and more supermarkets integrate gastro-systems in order to set themselves apart from the market (e.g. Sushi bars, juice bars, dry-aged-beef bars).

CONSUMER HIGHLIGHTS

Number of food-shopping trips during the week decreases - **out of home** is becoming an increasingly popular trend.

Home delivery is increasing (focus on bigger cities). **Private labels** are catching up in trust and perception (75% of German consumers consider private labels to be on par with branded products).

TREND 1: FREE FROM, VEGAN, VEGGIE

The number of vegetarians, vegans and flexitarians is growing (German population: 81 million; 5 million vegetarians, about 1 million vegans and about 40 million flexitarians). The industry is responding with more products in this sector. Supermarkets are pushing their offers and consolidating their range on the shelves. Meatless products have become a multi-million-Euro business. More and more vegan restaurants and vegan supermarkets are showing up (focus on bigger cities).

VEGETARISCHE MÜHLEN CHICKENBURGER

Brand: Rügenwalder Mühle

Launch date: 11/2015

Category: Frozen Products

Family: Savory Frozen Products



General description:

- A frozen vegetarian chicken patty to be served as a burger
- High Convenience: ready in 10 min in a pan or in the oven
- Small package targeted especially for single households

Why is this product a success? Rügenwalder (known for classic meat products) changed its strategy as meat consumption is decreasing and started producing meat alternatives. In a short time Rügenwalder became a leader in meat alternatives. The targeted sales volume is 30%.



TREND 2: SUPERFOODS & HEALTH

Chia seeds, aronia, quinoa, açai berry, goji, matcha tea... the so-called superfoods are becoming more and more popular alongside daily nutrition. Conventional products (bread, yogurt, cereal...) are integrating this trend into their ingredients. Low-carb nutrition is in vogue. Healthy nutrition is becoming a matter of faith.

SKYR

Brand: Arla Foods

Launch date: 06/2015

Category: Fresh products

Family: Dairy Products



General description:

- Mixture of yogurt and curd cheese
- Traditional product from Iceland almost fat free
- Skyr opens up a brand new category in dairy shelves
- Healthy-trend product

Why is this product a success? The target group is an increasing number of consumers who want to eat healthy and fat free but still want to indulge themselves.

With Skyr Arla combines these two worlds in one product. Interesting for retailers as Arla opens up a new category at the point of sales.

TREND 3: CONVENIENCE, OUT OF HOME AND SMALL PACKAGING

As supermarket trips during the week are decreasing, convenience and out-of-home solutions (ready-to-eat meals, fresh-cut salads and fruit cups, ultrafresh pasta products, etc.) are preferred. As the number of single households gets bigger, the FMCG sector is laying emphasis on small packaging.

RUSTIPANI

Brand: Nestlé Wagner

Launch date: 01/2015

Category: Frozen products

Family: Savory Frozen Products

Sub-family: Other



General description: Sandwich meets Pizza: Rustipani is a new frozen snack – farmer bread with rustic topping. It opens a new segment in the freezer.

Why is this product a success? Nestlé Wagner created a new frozen-snack category with Rustipani - both for retail and consumers. A convenience product that accelerates the home eating factor.



DO NOT MISS

Edeka Zurheide, Düsseldorf

Edeka Hieber, Lörrach

Kaufland-concept-store

Frankfurt Eataly, Munich

Aldi future-store, Unterhaching (close to Munich)