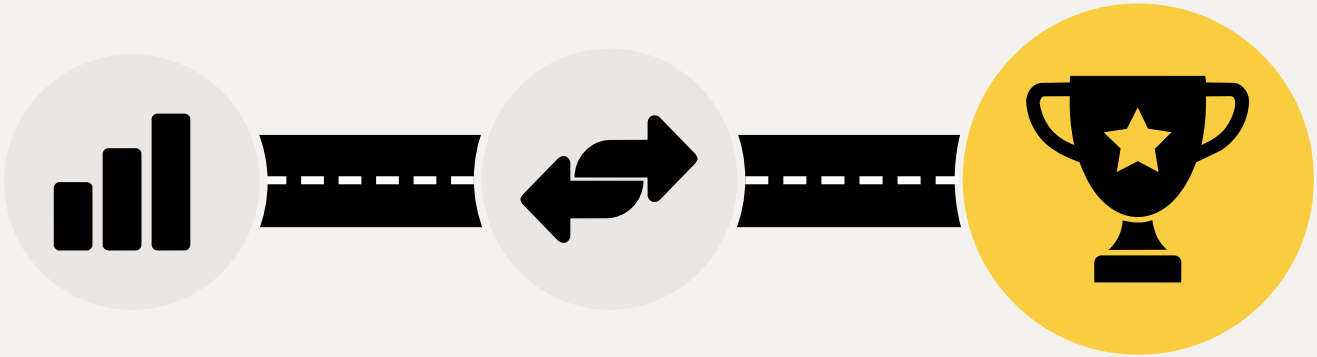


Track it. Sync it. Win it.

Racing towards plant-rich retail in Germany



madre brava

WWF

SYSTEMIQ

Introduction

Germany wants to eat affordable, healthy, tasty food. The EAT-Lancet Commission's Planetary Health Diet (PHD) offers just that – recommending we eat mostly plant-based proteins, with moderate amounts of animal-sourced proteins, to maximise human and planetary health.

Madre Brava, Systemiq and WWF International explored how competition and cooperation ("co-opetition") between German retailers can speed up shoppers' shift to the PHD.

This briefing summarises our findings, which are presented in full here. It defines pathways showcasing how a few front-running retailers can ambitiously shape the market towards more diverse protein consumption, and so the recommendations of the PHD.

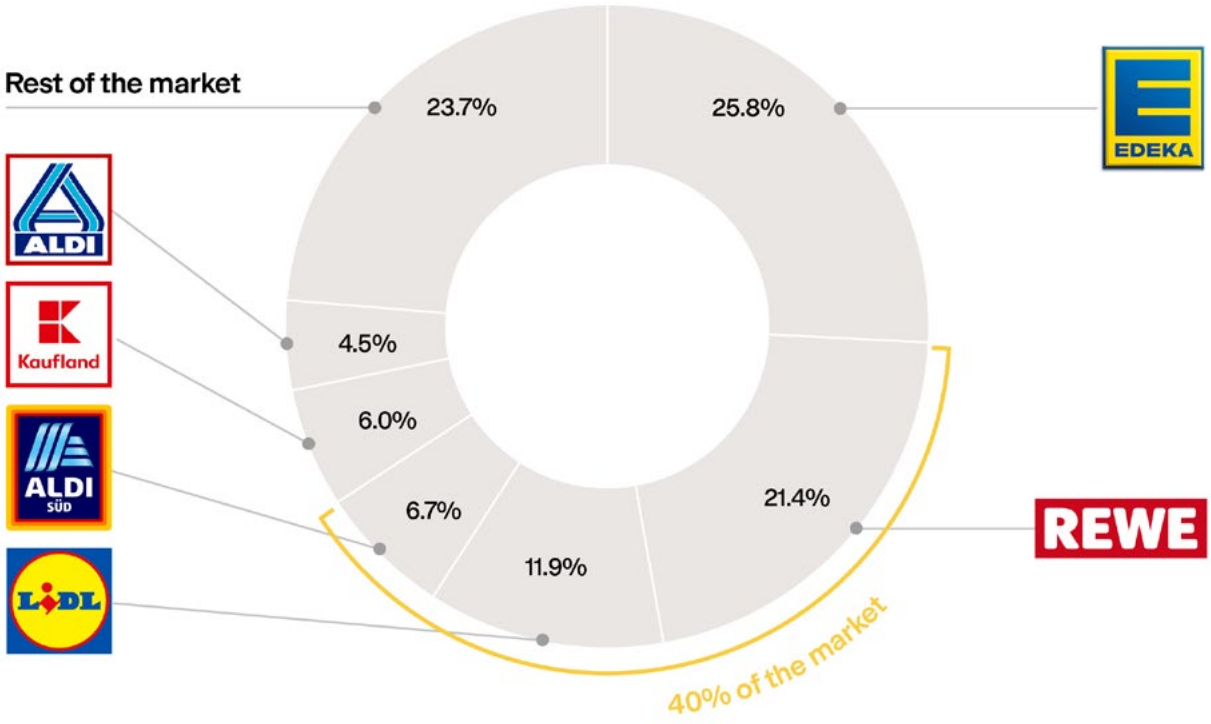
Key findings

In all scenarios assessed, food retailers have the power to pull the market towards adoption of a PHD – yet at different speeds. The German market can accelerate adoption by as early as 2030 – but this requires 40% of the market to co-opete: cooperating in standard-setting and supply chain infrastructure, whilst competing on the best food environment.

In the past, Lidl, Aldi Süd and Rewe have communicated targets to increase their share of plant-based sales. Together, they account for exactly 40% of the market.

Compared with the least ambitious scenario (a 'Fragmented Drift'), which reaches its tipping point in 2043, the most ambitious

Market share of the biggest German retailers





“The single most important lever is for retailers to set and communicate ambitious near-term targets to increase the share of plant-based products sold – particularly in the protein-rich food group and the dairy category.”

scenario (a ‘Systemic Shift’) reaches its tipping point 13 years earlier. This avoids a cumulative 426 $MtCO_2e$ – seven times the annual agricultural emissions of Germany – and spares around 101 million hectare-years of land from food production – equivalent to an area roughly the size of Switzerland every year until 2050.

To get there, the single most important lever is for retailers to set and communicate ambitious near-term targets to increase the share of plant-based products sold – particularly in the protein-rich food group and the dairy category.

“The EAT-Lancet Commission was created to establish, for the first time, robust scientific targets for healthy diets from sustainable food systems. These targets were meant to offer clear guidance to policy makers, business leaders and all stakeholders on the level of ambition needed to optimise human health and produce food within planetary boundaries. As we had hoped for, these targets have become widely accepted and the Planetary Health Diet has become a North Star on what we should eat for people and planet. This report takes the important next steps on turning science into action by helping food retailers to operationalise this North Star and implement intermediate targets and actions to achieve a positive tipping point. Food retailers have tremendous power in shaping diets and influencing the market and should use this power to ensure healthy, sustainable and equitable diets for all.”

– **Brent Loken, WWF Global Food Lead Scientist, former EAT-Lancet Commissioner.**

Context

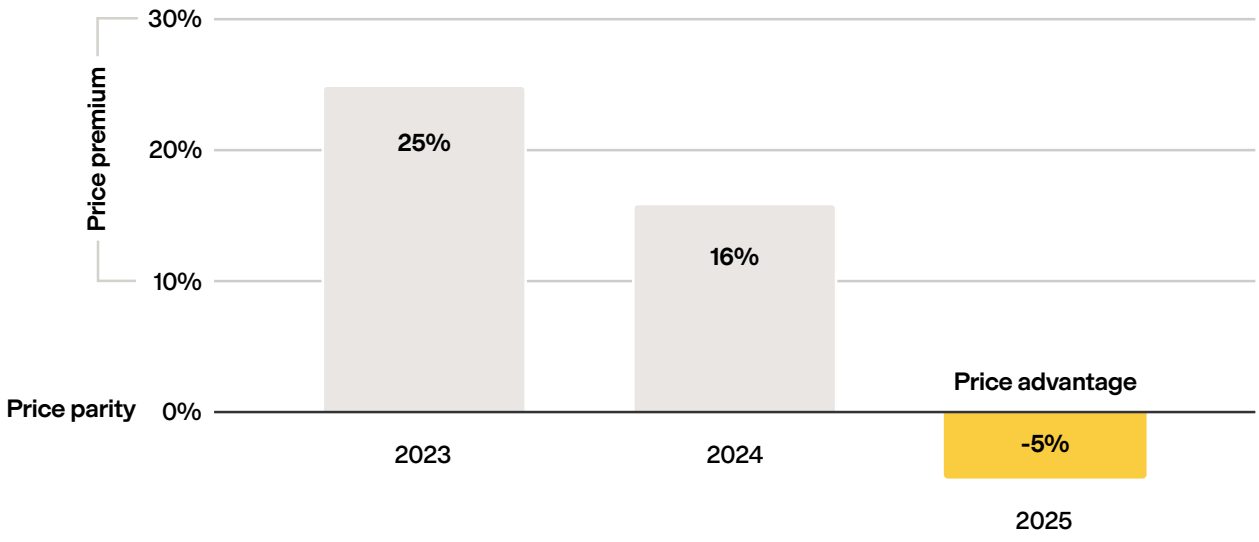
In October 2023, Lidl Germany introduced price parity for its plant-based alternatives – setting the price at or below the level of its animal-sourced counterpart. The market quickly followed. Just two years later, in November 2025, ProVeg Germany announced that the average price for plant-based alternatives like schnitzel or pizza had hit price parity across all major supermarkets – even slightly beating the price of animal-based counterparts in some instances.[1]

This type of frontrunner-induced co-opetition can prove to be helpful in empowering consumers to make better choices for personal and planetary health. The faster the market follows, the faster consumers are empowered.

At the Tagesspiegel Background Conference on Agriculture & Nutrition (Fachkonferenz Agrar & Ernährung), which took place in July 2026, Philipp Hennerkes, the CEO of the German Food Retail Association (BVLH), acknowledged that the PHD is seen as an implicit goal for German retailers.

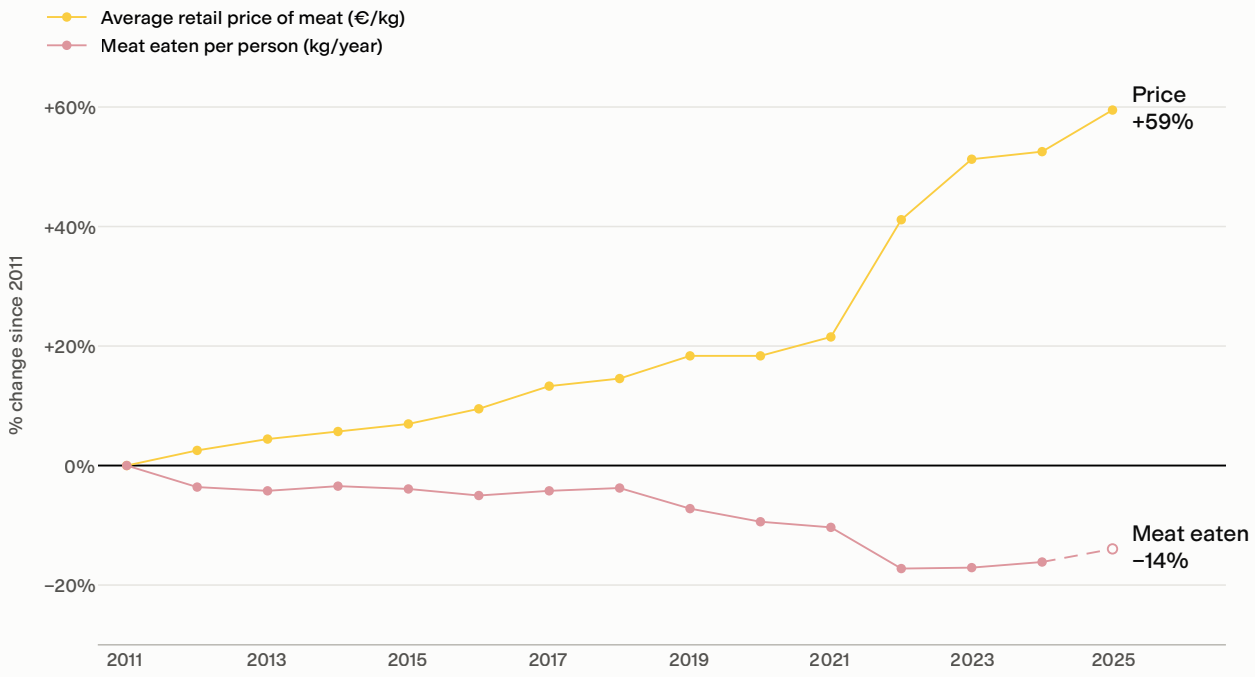
Yet, with the recent introduction of the EU's EmpCo (the Empowering Consumers Directive), which is designed to protect consumers from greenwashing, retailers can no longer communicate vague ambitions or implicit targets.

Price premium for plant-based alternatives across German supermarkets over time



Source: ProVeg Deutschland (2025), Preisstudie 2025 – https://proveg.org/de/presse/preisstudie-2025

Average retail meat price and per-capita meat consumption in Germany, percentage change since 2011



Sources: Euromonitor International, Staple Foods, Industry Edition 2025 (average across all meat categories); BLE, Supply of Meat in Germany 2010–2025. 2025 consumption preliminary (dashed). 2025 consumption (54.9 kg) is the published BLE figure.

This creates a necessity for external guidance on the sensible next steps retailers must take, thereby empowering them to once again make claims about their ambitions and showcase the implementation measures they are planning. Whilst this report ultimately empowers consumers to make better choices, it does so via empowering retailers to act on their responsibility to create better choice environments for their customers.

The Federal Government has set a target to achieve Net Zero by 2045.[2] Europe is currently heating up twice as fast as the rest of the world.[3] The German government's climate plan intends for protein diversity to contribute to the reduction of agricultural emissions by 80%.[4] Once the plan is operationalised, it will put enormous pressure on food retailers, as animal-based products currently make up around 50% of their total emissions. Increasing their sales share of plant-based products is an absolute necessity to reduce their Scope 3 emissions – thereby supporting Germany's Net Zero ambitions.[5]

This ambition meets a plant-based market in Germany that is ready to scale. Consumer interest in healthy living has increased by 32% in the last five years,[6] while meat prices are increasing and consumption is declining. The category of plant-based alternatives, on the other hand, is growing at about 7.1% per year. With around €1.7 billion in total sales in 2024, Germany is Europe's biggest market.[7]

By supporting the adoption of eating patterns that align with the PHD, retailers can contribute to their bottom line and their Net Zero targets, while simultaneously securing customer loyalty via stable prices, innovative products, and long-term health.

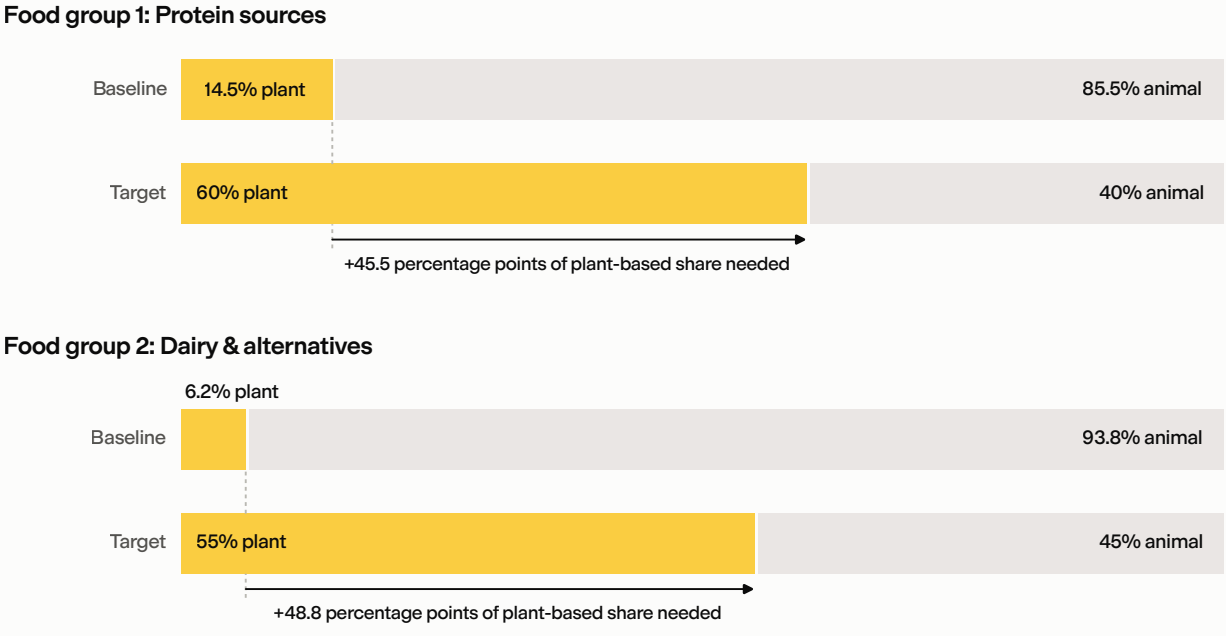
Study design & methodology

The PHD recommends a rapid and drastic increase in plant-based protein consumption. When calculated with the WWF Planet-Based Diets Retailer Methodology, the protein split is 60% plant to 40% animal by 2050 at the latest.[8] The current baseline split for protein-rich food across German food retailers is far from this goal: 14.5% plant to 85.5% animal.

This study describes the conditions that support this transition, moving the segment from its current 'early adopters' phase towards adoption by the 'early and late majority'. These adoption phases can be observed universally across the success of other socially or technologically-enabled transitions.

The food environment in German retail still sets animal-sourced foods as the norm, hindering further adoption of healthier and more sustainable alternatives. The most striking example of this is the V-label. Products that contain animal-derived ingredients require no further communication to consumers, whereas fully plant-based products require an extra label – or an extra filter to set when shopping online. Default biases like this, next to hard factors like placement and promotions, influence the perceived quality of products. This in turn influences the likelihood of consumers trying a plant-based product.

2024 baseline vs. Planetary Health Diet target split

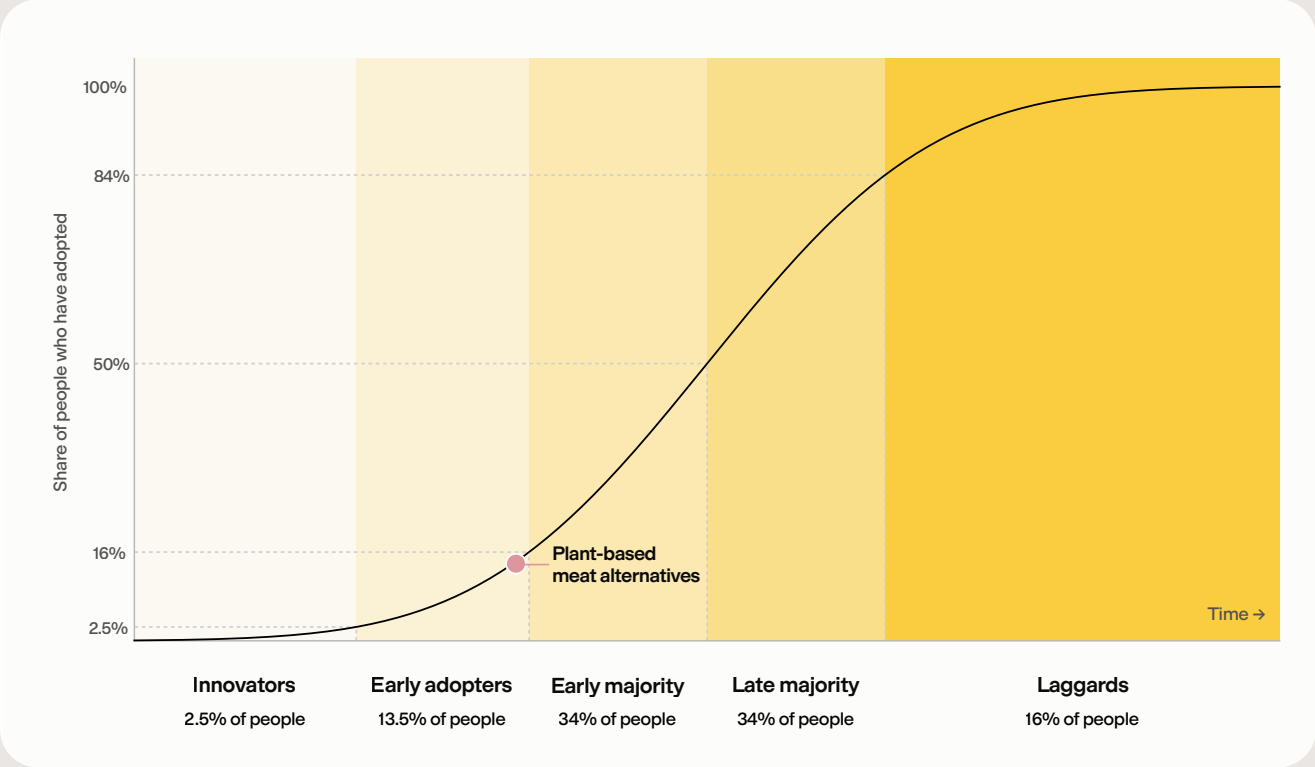


Why change comes in S-curves

New products spread in predictable phases (Rogers, 1962). Innovators and early adopters, about 16% of the population, buy on values. The early majority doesn't: it needs price parity, habit fit, convenience, and social proof. Over time, adoption forms an S-curve: a slow start, rapid acceleration once the early majority joins, then saturation. Cage-free eggs, trans-fat removal, and electric vehicles all followed this curve.

Plant-based meat in Germany is at a turning point. 14.4% of households buy it habitually (6+ times a year) – just 1.6 percentage points short of the early majority. This is where most food innovations stall or take off. The measures in this report lead to take off.

Source: NIQ Homescan 2025, analysis by Madre Brava

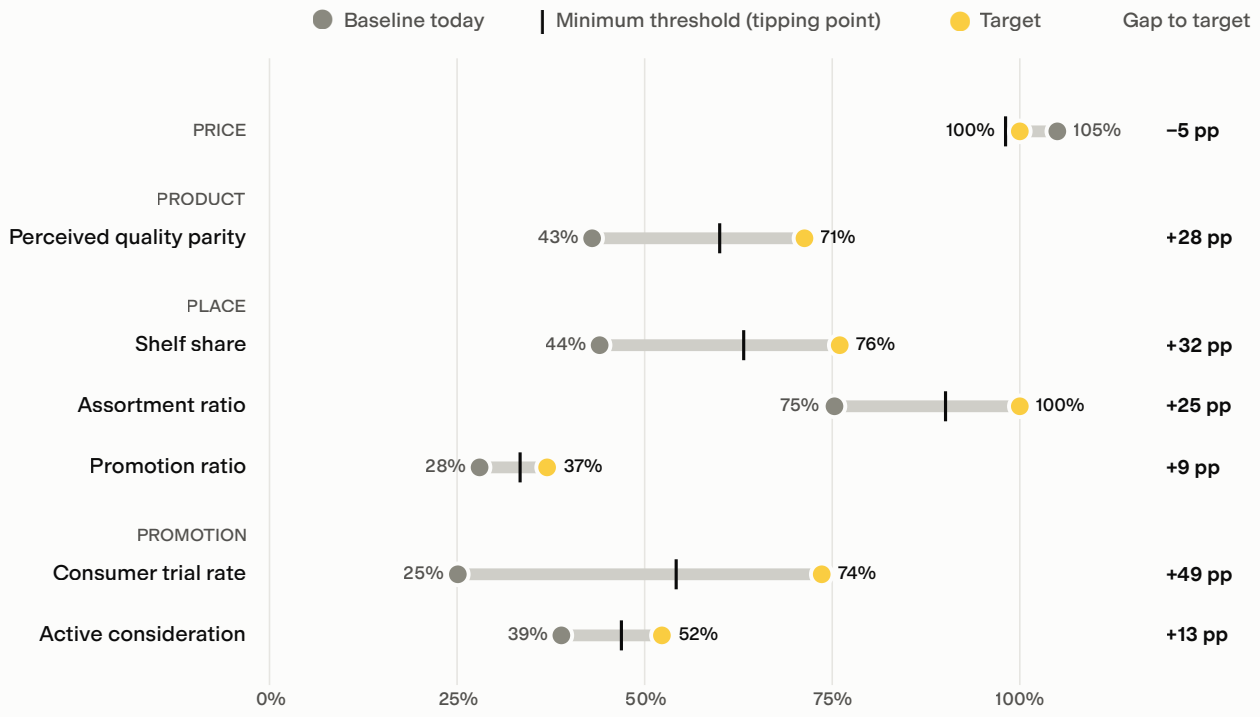


"The report identifies the most relevant gaps consumers still experience across product, price, place, and promotion."

The report identifies the most relevant gaps consumers still experience across product, price, place, and promotion. To move from linear growth towards S-curves, there must be more Stock Keeping Units (SKUs) of plant-based products available in the first place. They also need to be displayed more prominently in promotions and be given greater shelf space. Once enough of these gaps are closed, feedback loops take over, leading to self-reinforcing change: more sales lowers unit costs, lower prices raise trial rates, more trial justifies more shelf space and so on.

As a next step, the study evaluates the effectiveness of 'enabling measures' that retailers can take to close these gaps. The report proposes a total of 30 measures – shortlisted based on feedback from retail practitioners on feasibility, competition and law compliance. The 30 measures span the classic 4Ps of marketing (product, price, place, promotion), plus organisational changes and political advocacy work.

Transition variables for plant-based products in German retail: baseline vs. target, grouped by the 4Ps



Source: Final report, Figure 2 and Annex A Table 4 (GFI Europe, ProVeg Preisstudie 2025, NECTAR 2025).
pp = percentage points.

4P + Policy

Price: More plant-based staple foods at entry prices.

Product: Increase assortment range, in-store sampling, trial packs, XXL packs, hybrid products, fortification, product development commitments.

Place: Adjacent placement, shelf space commitment, plant-based default online and in-app presence.

Promotion: Amplify external plant-based campaigns (e.g. Weltvegantag, the Dutch version of "Week Without Meat"), use cultural moments and promotional weeks to standardise plant-based products.

Policy: Split targets in buyer KPIs, animal welfare commitment, appoint a Head of Protein, supplier plant-based scorecard, frontrunner coalition, VAT advocacy, public partnerships (insurer, university), Art. 210a CMO Exemption.

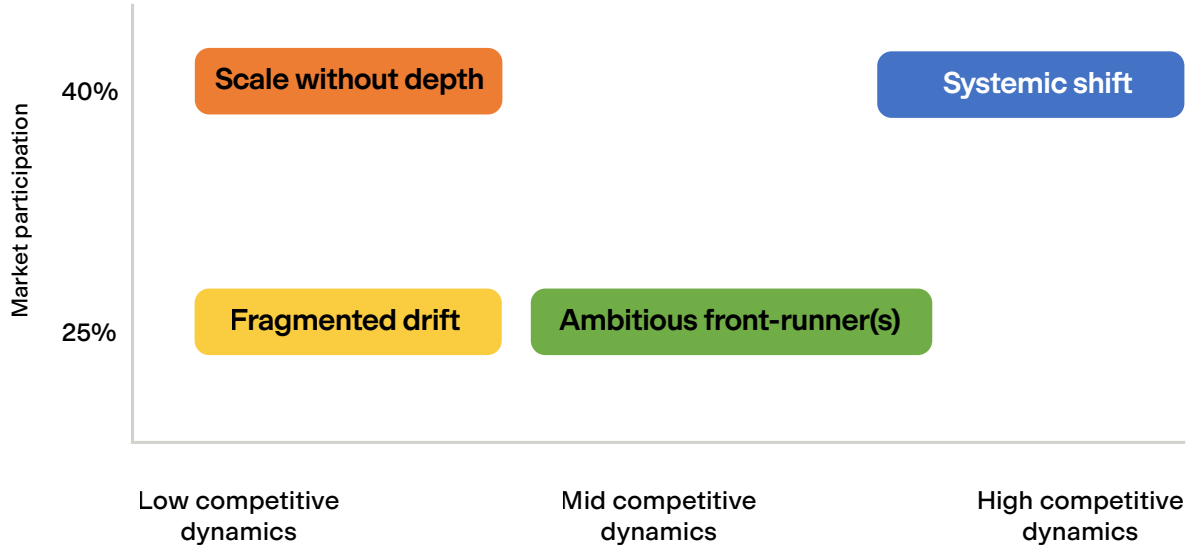
“If 40% of the market adopts the measures and competitors follow each other quickly, seasonal promotions reach full effect within three to four years.”

This effectiveness has been validated based on available literature and expert interviews, taking assumptions on quantifiable costs, such as CAPEX and OPEX, into account, as well as qualitative ease of implementation in-store or online.

The report then models four scenarios that vary in three ways: market penetration (25 or 40% market share), how quickly competitors follow the same enabling measures (after a minimum of one to three years), and the correction factors applied for the time those measures take to reach full effect on the transition variables.

For example, if 40% of the market adopts the measures and competitors follow each other quickly, seasonal promotions reach full effect within three to four years. But this could take around ten years if only 25% of the market acts and co-opetition among them is slower.

The four scenarios assessed



The model then analyses how the enabling measures’ effect on transition variables influences consumer adoption rates for healthy and sustainable eating habits. This transition towards the PHD is aggregated and measured using the WWF Planet-Based Diets Retailer Methodology.

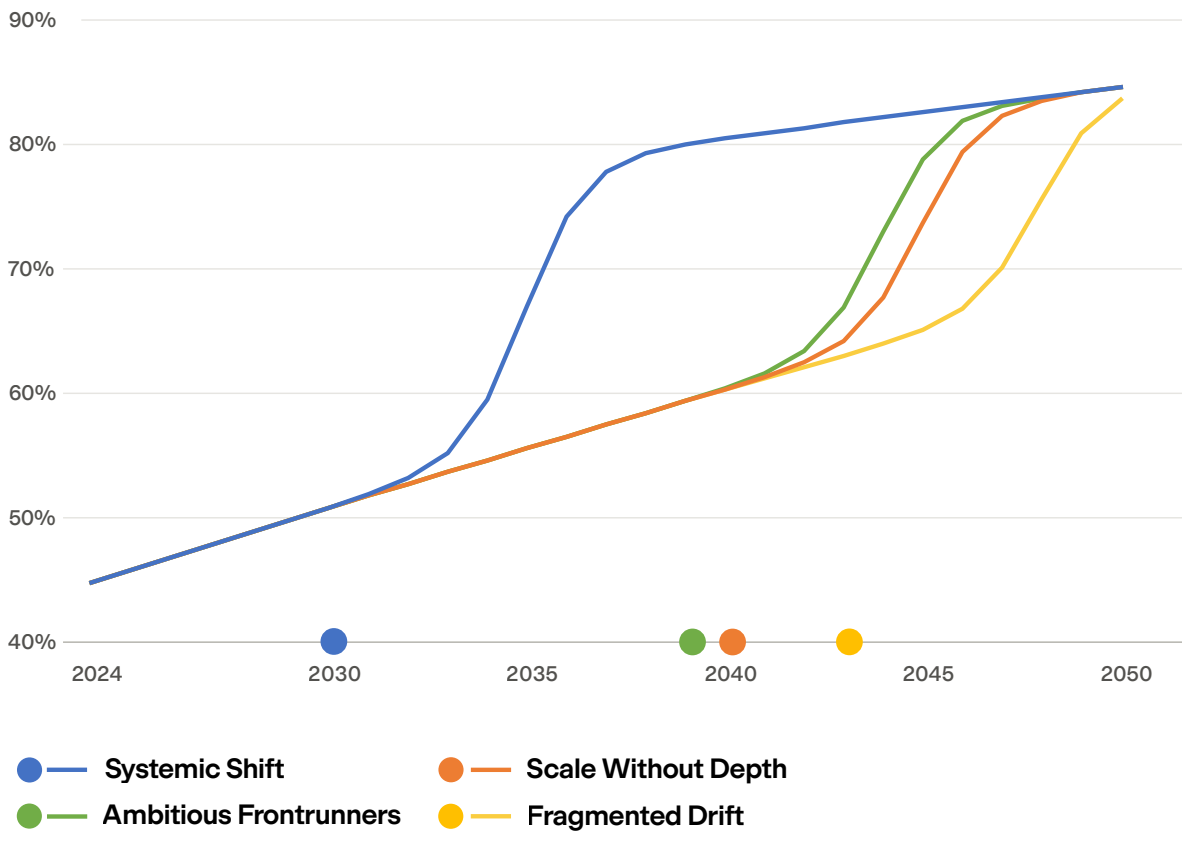
This allows for the visualisation of different rates of adoption curves for different food groups, such as protein-rich foods (animal and plant-based meats, legumes, nuts or seeds) and dairy foods (animal and plant-based milk and dairy) – in parallel to the measurements German food retailers already apply.

Results

All scenarios assessed contribute, to some extent, towards the adoption of PHD-aligned plant-to-animal splits. This means that, when 25 to 40% of the market implements between 19 and 30 enabling measures (such as joint advocacy on VAT equalisation), it is sufficient to positively influence the market's PHD adoption rate. Yet the scenarios differ substantially in how quickly this happens.

Independent of the measures implemented, due to the delay in these taking effect, all scenarios assume linear growth and hence identical trajectories until 2030. Yet frontrunning retailers and their customers will already be able to reap the benefits of these early mover choices. The model shows that, in the most ambitious scenario, the market tips towards the PHD in that same year and gets very close by the late 2030s. Having just a few ambitious frontrunners with highly competitive dynamics leads to an earlier uptake than when many retailers engage in food environment measures, yet do not co-opete successfully and hence fail to align their actions with their competitors. Speed and consistency beat market share. The least ambitious scenario, in contrast, only tips in 2043 and does so less strongly, leading to missed targets at organisational and national level alike.

Plant-based % split for whole assortment across all scenarios



Circles mark the tipping point in each scenario

Implications

For consumers

The PHD already saves a two-person household in Germany €1,300 per year compared to the average German diet. Geopolitical risks and climate change are likely to increase this gap,[9] so the faster retailers can support the adoption of a PHD, the better they can limit inflation.

The PHD is also significantly healthier than the average diet. Around 200,000 premature deaths could be avoided in Germany annually with full adoption. The quicker it is adopted, the more lives are saved. Shoppers who make the switch also stand to gain an additional two years lived in good health across an 80-year lifespan.[10]

When it comes to taste, the report urges retailers to centre their efforts on the perceived quality of their products. With a commitment to product development and better supplier relationships, tastier products will emerge on the market, increasing the pace of adoption.

For retailers

Diversifying protein supply secures profitability. The plant-based market is growing and will continue to, driven by external factors such as compliance, climate change and health trends, and internal factors such as competitors changing their offerings proactively. That means the time to shape this change is now or risk losing market share in the future.

Competitive risk falls as participation and co-opetition rises. A retailer acting alone bears all the costs while a retailer acting in a broadly engaged market shares the risk and gains the demand signal. In the plant-forward protein market of the future, competition shifts from defending existing demand to capturing latent demand.

The price bottleneck has been overcome, yet perceived quality remains. In all scenarios, the minimum threshold for quality stays below parity. Price, promotion, and availability have to compensate for this. The first retailer to unlock quality is set up for success.

"The report shows that price, health and sustainability-conscious shoppers alike ought to push their supermarkets towards the adoption of PHD-aligned protein split targets."
– Moritz Möller, Germany Director, Madre Brava

“Good-quality food at affordable prices for everyone – that is our commitment at ALDI SÜD. Plant-based protein sources should be just as easy and natural a choice for consumers as animal-based ones. That is why we are making plant-based attractive, available, and affordable, and, in doing so, are contributing to future-proof diets. At the same time, we are convinced that driving this development forward effectively requires a joint approach across the industry and supportive policy frameworks.”

– Dr. Julia Adou, Director National & Global Sustainability, ALDI SÜD

For policy makers

The PHD is imperative to an affordable and resilient food system. The existing protein crop strategy (Eiweißpflanzenstrategie)[11] is a great start to ignite change on the supply side, yet around 70% of food consumption in Germany runs through retail, so that’s where German diets change.

As such, how fast retail moves largely determines whether national health and climate targets are reached on time. The study identifies policy levers that would materially accelerate the transition: VAT reform on plant-based products, plant-based proteins in public procurement (canteens, schools), and dietary guidelines built into policy.

A cross-government ‘National Protein Strategy’ would give farmers, processors and retailers the planning certainty to invest ahead of demand. Such a strategy would include agricultural, economic, health and climate measures, meaning all relevant ministries must be consulted rather than just one.

For farmers

The market will shift – the only question is when. Suppliers that diversify production early and invest in infrastructure that can be retrofitted for new protein products will gain a competitive advantage.

With retailers setting protein split targets and reporting on their progress, reliable data becomes a necessity. As the category grows, suppliers that provide ingredient-level data on protein source and content can help retailers report credibly and become preferred partners.

The study recommends that retailers back their targets with long-term volume commitments and joint development programmes. Arguing for these types of contracts lets suppliers invest ahead of demand, instead of chasing it.

Conclusion

The report points to a rare opportunity to enter a new growth market in German food retail. It also shows how retailers can influence the timing of this market's emergence themselves, by committing to specific enabling measures in their food environment, their organisational design and their policy work.

Once demand tips, the landscape shift will come quickly. The result is a food system that is resilient, affordable, within planetary boundaries, healthy and just.

Retailers now face a strategic choice. Will they drive change via their promotions and marketing strategy, investing in research and development, and product innovation, or will they wait for others to capture the latent demand and fall behind?

For those who choose to lead, the path is clear:



Track it

Measure protein splits with a shared, verifiable standard.



Sync it

Align targets with a trajectory anchored in the PHD, starting with an ambitious, public interim target for 2035 (≥ 38% plant-based protein sources, ≥ 32% plant-based dairy alternatives).



Win it

Compete on price, quality and choice, and make the healthy, sustainable option the easy one.

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The pathways for change defined in this report have been the result of a joint effort between Madre Brava, the former EAT-Lancet Commissioner Brent Loken, WWF International and the research consultancy Systemiq. We thank all participating food system experts and food retailers across the board for their contribution to the thinking behind this model.

Download the full report here.