



Euromonitor
International

Baked Goods in Germany

November 2025

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Baked Goods in Germany - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Essential status supports continued demand despite economic challenges

INDUSTRY PERFORMANCE

Value holds up as discounters and bake-off lead

Unpackaged bread sales boosted by discounters' expansion

WHAT'S NEXT?

Bread and rolls remain everyday staples

Healthier choices rise with whole grain, fibre and simpler recipes

Greener packs and smarter baking cut waste and keep shelves fresh

COMPETITIVE LANDSCAPE

Aldi leads in baked goods, while Harry-Brot remains the number one brand manufacturer

Private label performing well

CHANNELS

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Online sales growing

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Staple Foods in Germany - Industry Overview

EXECUTIVE SUMMARY

Affordability, convenience, and health are primary considerations

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INDUSTRY PERFORMANCE

High levels of budget consciousness

Affordability and clarity prove key

WHAT'S NEXT?

Brands need to show clear, everyday benefits in face of strong private label competition

Private label to quickly mirror brand moves

Discounters to remain key, while online channel continues to develop

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Major retailers lead

Simplicity and practicality are key to success

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