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A Systematic Study on Strategic Analysis of Global Vegan Food Markets

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Abstract: *Vegan foods grabbed the focus and attention of the researchers working in the different fields like marketing, policymakers, healthcare specialists, etc. The aim of this research is to explore and bring novel and researchable ideas to mitigate current limitations in the vegan food market. The analysis of current trends in the field of the vegan food market and various approaches to market it by understanding consumer needs, their awareness and barriers in the adoption of vegan food is carried out in this research. The global study indicates that there are variations in the consumer preferences, acceptance and adoption of vegan foods. These variations result from beliefs, cultural differences and level of awareness in the consumers. It is claimed that the vegan market may grow exponentially if appropriate tools are used to mitigate the current challenges faced by marketers, consumers and policymakers. This research contributes different novel ideas to mitigate current challenges, like AI-driven consumer segmentation, family decision-making in the context of mixed diets, innovative approaches in label design, cross-cultural comparison and the use of vegan foods in non-vegan contexts, which are presented in this research work.*

Keywords: Vegan food, Customer micro-segments, Mixed-diet households, Vegan food labelling, Cross-cultural comparisons, non-vegan settings.

INTRODUCTION

The global food system is currently going through the vegan food sector. The focus of vegan food is on fruits, vegetables, grains, nuts, seeds, plant milk, etc. It excludes all the animal products. Formally, vegan food is defined as any cooking made solely from plant-based ingredients, avoiding meat, dairy, eggs, honey and animal-derived items [16]. Veganism has a great history of around 200 years. Buddha promoted animal-free diets. The modern vegan concept was started in the 1940s by Donald Watson. Figure 1 presents global timeline of vegan and plant-based food innovation. Vegan food offers numerous benefits, like lowering the risks of type 2 diabetes, prostate cancer, heart disease and certain cancers due to fibres, antioxidants and low saturated fats [4]. By adopting vegan food, body weight can be managed, it helps to improve digestion and it also helps to run natural environmental cycles by saving the killing of poor animals eaten by humans [8].

The marketing of vegan food still faces numerous challenges, like identifying the consumer choices, the reasons behind their preferences and adoption, and labelling vegan food packages with attractive designs that explore the benefits over other food preferences [20]. Post-purchase identification of the reason behind the repetition of purchasing a particular product, mouth publicity by consumers that increases the sale, novel marketing strategies and ideas to sell non-frequently purchased products. Consumers may deny adoption of vegan products due to their price, taste, availability and nutritional content [5, 15]. Weak flavour, odd texture and heavy processing may also be the reason to deny adoption of vegan food. These areas can be further researched to motivate consumers to smoothly adopt the vegan products.

The aim of this research is to explore the novel ideas to mitigate current limitations of the vegan food market. By understanding the variations in consumer preferences in-depth, which are primarily driven by religious beliefs, cultural

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heritage and varying levels of awareness. By understanding solutions to these challenges, marketers can bring personalized campaigns that enhance the sale of vegan food. The strategies beyond "one-size-fits-all" make consumers to get their customized solutions about vegan food, marketers to increase the sale and policymakers to adopt various aligned policies to bring innovation in the field. This study identifies that some regions are driven by climate awareness, some are motivated by traditions, etc. Hence, to overcome these challenges, marketers need to adopt specialized tools that focus majorly on specific needs of consumers.

The present research contributes five novel ideas, namely AI-driven consumer segmentation, family decision-making in mixed-diet contexts, innovative label design psychology, cross-cultural comparisons, and the use of vegan foods in non-vegan settings. These novel dimensions provide new aspects to look at in the vegan market and would open various opportunities.

Section 2 provides an in-depth literature overview. The current global scenario of the vegan market is elaborated in section 3. Section 4 provides timely and impactful discussion to provide new ideas to researchers and practitioners working in the vegan market industry. Section 5 concludes the paper with findings and research gaps identified during the study.

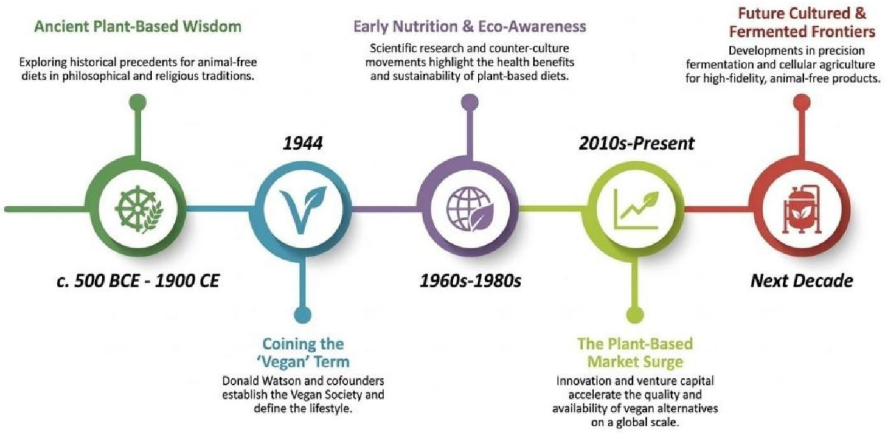


Fig. 1. Global Timeline of Vegan and Plant-Based Food Innovation

II. REVIEW OF LITERATURE

This section provides an in-depth discussion related to vegan market globally. The numerous research papers were studied and the findings, techniques of these papers are thoroughly presented in the sub-sequent sections.

The scholarly debate on vegan and wider plant-based food markets has grown swiftly as these items have shifted off the niche shelf and into mainstream retail and food-service offerings across the globe [13]. The initial research largely positioned vegan foods in health and environmental marketing terms, whereas more recent studies position vegan foods as a competitive market segment with competitive dynamics, product architectures and branding issues [11]. The reviews of plant-based meat and dairy analogues focus on the pace of product portfolios diversification: burgers and sausages are replaced by plant-based fish and eggs and special products, but also indicate that this expansion is not uniform in regions and target markets [16]. Collectively, the literature is suggesting a picture of a global market that is growing, yet weak and highly influenced by how consumers perceive and experience these new products as opposed to supply-side innovation alone.

The consumer based research has regularly pointed out a combination of a pull factor and push-back that influences the demand on vegan foods [8]. The most mentioned reasons why people are trying or switching to plant-based diets are health consciousness, animal welfare concerns and environmental concerns [4]. A number of reviews have indicated these ethical and sustainability reasons are especially relevant to younger and more educated groups. Simultaneously, the omnivores, flexitarians and even organic consumers tend to refer to vegan products as not tasting, less satisfying or

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too processed to like, thus lowering preference and repurchase regardless of a positive attitude to the ideologies [21]. Cross-sectional studies also indicate that the proportions of motives and barriers differ severely across countries and dietary categories and that is why the same products may be successful in one nation and fail in another [14].

A big group of studies goes further into sensory properties and product experience, due to the fact that taste, texture, and mouth feel continue to be the centre of attention in the aspect of acceptance. A review of the literature reporting plant-based meat, dairy, fish and egg analogues indicates that, despite an increasing number of consumers believing that meat products should be replaced by more vegetarian options, numerous customers continue to feel that such foods lack the juiciness, bite of proteins, creaminess or general indulgence, when compared to food derived from animals [21]. The experimental and survey research conducted on individual product lines such as burgers, sausages and plant based dairy have assured that the perceived sensory quality may override the positive health or environmental perceptions as individuals make actual purchase decisions. As per these findings, companies can exclude bridging the sensory gap and grow their business based on health claims or the sustainability messages. This means they have problem turning interest into stable market share [14].

Researchers also started to predict the personal preference, social and psychological aspects of vegan food adoption. According to value attitude behaviour model, perceived evaluation, stereotyping or out of place can be a major discouragement to adopting vegan diets though many consumers have positive values and attitude towards vegan food adoption [23]. Socio-cultural environment studies also indicate that socio-cultural practices, family demands and food habits have the potential to facilitate or hinder the process of transitioning to plant-based diets, particularly in cultures where meat is closely associated with hospitality or social standing [12]. To support these survey-based observations, a recent thematic analysis of social media discussions presents the image of plant-based eating as expensive, confusing, divisive and questionable, showing that people are still divided about health ideologies, environmental gains and the genuineness of highly processed meat alternatives. The field experiments conducted in actual food restaurants also confirm that minor manipulation of menu design, defaults and positioning can push more people towards plant-based options, but the impact is small when the threats of social identity and stigmas are not addressed.

The other line of literature considers the broader food environment and market policies that are required to normalize vegan foods. Reviews policy-oriented state that motivation individually is not sufficient when the healthier and more sustainable choice is more difficult to locate, more costly or less conspicuous in stores and food-service venues. There is limited empirical and narrative research on plant-based meat alternatives that can be used to propose that price parity, shelf placement, non-replacement branding and clear information regarding the processing process may all play a role in trial and acceptance. Recent literature also indicates an increasing mistrust of the actors of the food system and a lack of understanding of labels, like those that are plant-based, vegan, natural or high-protein, making both strategic positioning and regulating these labels especially difficult [25]. These strands combined also strengthen the perception that the strategic analysis of vegan markets should combine product design, pricing, labelling and policy interventions instead of viewing consumer choice as a single decision.

Lastly, emerging studies define regional and temporal changes in consumer discourse and interactions with vegan food, which explains the need to consider the global market perspective. From comparative linguistic analysis of three nations for the last decade demonstrated that beyond the novelty and experimentation, more complex discussion on healthfulness, processing and authenticity with discernible cross-country variations is required [9, 26]. The emerging market studies, such as India, demonstrate interesting trends: health benefits, environmental attitudes and curiosity (epistemic value) seem to be at the core of the purchase intention towards plant-based diets and different strategic leverages should be employed by companies that do not belong to the classical Western vegan diasporas. Meanwhile, scholars of public health and sustainability are demanding slow changes enabled by shifts in availability, affordability and marketing limits of less sustainable choices and vegan products are viewed as components of a larger food systems change, not a lifestyle choice. This developing literature preconditions a systematic strategic study of the global vegan food markets, which is interested in what its consumers say they know about, but also in how markets, cultures and institutions produce what ultimately ends up on their dinner tables.

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III. THE CURRENT GLOBAL SCENARIO OF THE VEGAN MARKET

The vegan food market globally has shifted to mainstream, packaged (and non-packaged) segment, retail and food-service segments are steadily growing. According to industry reports, vegan-foods earned an estimated 19-22 billion USD already in the first half of 2020 and are estimated to increase to over 20 billion USD before 2030, with a compound annual growth rate of high single to low double digits [1, 18]. Even packaged vegan foods are projected to grow to approximately 19 billion USD in 2025 to approximately 45 billion USD in 2033, indicating that it is not solely fresh products that are contributing to this commercial growth [19]. This is a trend driven by the increasing alarm on the issue of lifestyle diseases, the increasing awareness regarding animal welfare and the growing popularity of sustainable diets.

Europe and North America still lead the packaged vegan and plant-based packs, regionally, with robust retail distribution, new products are frequent and vegan claims are highly visible on menus and in supermarket shelves. Simultaneously, Asia-Pacific is now the most notable market of plant-based milk alternatives, as the countries of this region have long been used to soy and other non-dairy drinks like China and India [24]. Market surveys also indicate high growth rates in Latin America, Middle East and some African markets where lactose intoleration, urbanisation and government food-security policies are creating room where dairy and meat substitutes can exist. Such regional patterns indicate that the so-called global vegan markets are not homogenous; local food culture is, in fact, integrating with new plant-based formulations locally, in its individual manner [10].

Among the wider vegan category, the most vibrant product segments are the dairy and meat alternatives. Alternatives to dairy items, such as milks based on soy, oat, almond and other grains or nuts, have a global market value of over 30 billion USD and are expected to grow to over 100 billion USD by the next decade [24]. Parallel to this, soy, wheat gluten, pea protein and newer proteins are also being used as hybrid products to drive the sensory difference between plant-based meat and conventional meat, as companies work to reduce the sensory difference. Diversification of burgers or sausages into more original plant-based dishes, ethnic and ready-to-eat meals is also a trend report where the brands accommodate the flexitarians, who desire variety (and not imitation) of animal products.

In spite of such an optimistic picture, there is no friction-free situation in the world today. The risk of inflation and increased cost of living has increased price-sensitivity of some consumers and growth in some markets or consolidation of highly priced meat-alternative segments, has been slowed down or even reversed [3]. Surveys and industry experiences show that despite their motivation either due to health or environment reasons, many shoppers consider plant based convenience foods to be costly or highly processed. Meanwhile, the reach of the plant-based diet is expanding even outside the vegan community. The most significant consumer population in most countries these days is flexitarians and plant-lean omnivores, particularly among the young generations, who do not avoid vegan products due to their health, variety and environmental friendliness. Such a combination of powerful structural forces and short-run headwinds forms a strategic environment, where long-term success in global vegan food markets depends on taking care of positioning, competitive pricing and believable communication.

IV. DISCUSSION

This section makes the in-depth discussion derived from the findings of literature. Table I presents a multi-dimensional research framework for vegan food consumer adoption. It would be helpful and act as a ready reference for researchers and practitioners working in the vegan food market domain.

The discussion can drive the vegan market discourse in one direction, namely, by considering the concept of AI-based consumer segmentation not as a buzzword, but as a flexible, useful mechanism that can be used to negotiate through the actual heterogeneity within the vegetarian consumer [28]. Recent surveys of the world indicate that flexitarians have currently taken the lead in demand of plant-based foods outshining strict vegans or vegetarians by a significant margin and they expect the company to be more forward-looking in terms of transparency, sustainability and adventurous flavours. Rather than dividing by easy categories such as vegan vs. non-vegan, the researchers can turn to complex models of profiles founded on motives, price sensitivity, sensory expectations and digital behaviour, and experiment

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with the reactions of various segments to product formats and messages. Practitioners can use all this information to create adaptive marketing systems where recommendation engines, loyalty applications and online menus can automatically present vegan choices that best fit the profile of each segment, instead of providing a single, generic offer to all.

The second, and frequently neglected, frontier is the mixed-diet family decision-making or food decisions which are discussed and not dictated. The longitudinal research on plant-based diets already demonstrates that family integration and support have a powerful influence on the retention of sustainable eating objectives in the long-run perspective. This is reflected in practical advice on plant-based families, which says that children fear losing their favourite food or being singled out at school and that engaging all members in shopping, gardening and choice of recipes can help overcome resistance [27]. To the researchers, this space can be used to leave the research behind the individual attitudes and study household micro-politics: who can influence the shopping list, which events are more bargainable and how minor concessions can alter the course towards adopting vegan products. To practitioners, family-oriented promotions, co-creation meal styles and deals specific to mixed-diet homes can help transform a possible conflict into a joint venture as opposed to a zero-sum eating war.

TABLE I. A MULTI-DIMENSIONAL RESEARCH FRAMEWORK FOR VEGAN FOOD CONSUMER ADOPTION

Idea / Lens	Core Question for Researchers	Key Constructs / Variables	Typical Methods	Strategic Levers for Practitioners
1. AI-driven consumer segmentation for plant-based	How do heterogeneous consumer segments differ in drivers of vegan/plant-based adoption?	Motives (health, ethics, environment), price sensitivity, sensory expectations, digital behaviour, flexitarian vs. vegan identity [28]	Cluster analysis, machine learning on survey & behavioural data, A/B tests	Dynamic recommendation engines, personalised offers, segment-specific messaging and formats
2. Family decision-making in mixed-diet households	How do household dynamics shape adoption and maintenance of plant-forward habits?	Family cohesion/flexibility, perceived support, household "gatekeepers", conflict/compromise patterns, occasions (weekday vs. festive) [2]	Longitudinal diaries, experience sampling, household interviews, dyadic/family surveys	Family-oriented campaigns, co-creation cooking formats, mixed-diet bundles, "meatless day" programs
3. Evidence-based vegan label design psychology	How do different label designs and claims influence trust and trial among omni/flexitarian shoppers?	Icons and certifications, colour palettes, naming conventions, claim framing (health, sustainability, naturalness), perceived risk [6]	Conjoint experiments, shelf/menu simulations, eye-tracking, online choice experiments	Standardised, compliant label systems, A/B-tested front-of-pack designs, clarified ingredient and sourcing cues
4. Cross-cultural framing of vegan and plant-based	Which motives and barriers are universal vs. culture-specific in plant-based adoption?	Cultural norms (religion, purity, masculinity), national identity, prevalence of plant-rich cuisines, social acceptance [17]	Comparative surveys, qualitative cross-country studies, cultural discourse analysis	Culturally grounded positioning (heritage plant-rich dishes vs. modern ethical framing), localised narratives

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5. Vegan options in non-vegan food environments	How do defaults, menu design, and social cues in mainstream venues change ordering?	Default structures, menu language, social norms, perceived social risk, repeat ordering, segment responses over time [26]	Field experiments in cafeterias & restaurants, transaction data analysis, menu A/B tests	Vegan defaults, smart menu engineering, themed nights, low-risk pilots and promotions in mainstream outlets

The third concept directly relates to the everyday activity of marketers: innovative label design psychology of vegan and plant-based products. Regulatory advice is becoming stricter all over the world and new ISO guidelines and country regulations are making it more dangerous to use undefined or self-devised badges that declare the product to be plant-based, as well as emphasis on transparency regarding ingredients and source. Meanwhile, the surveys of flexitarian buyers indicate the high interest in the transparent labels that address the needs of health, sustainability and naturalness in clear, reliable terminology [6, 24]. This presents an ideal platform on which experimental studies about how various icons, colour schemes, naming systems and pitch of claims influence perceived naturalness, credibility and readiness to experiment can be carried out, particularly among omni and flexitarian consumers [22], who are likely to be curious but conservative. Practitioners may then shift out of the generic green leaves and the 100%-vegan stamps to the evidence-based label systems, which not only meet the standards but push the wavering consumers above the trial threshold.

A fourth opportunity to work in a timely manner is the suggestion of a cross-cultural comparison of vegan and plant-based markets, where the same product may have a completely different level of meaning based on the society. The already existing comparative studies of vegetarianism already demonstrate that in Euro-American cultures vegetarianism is more closely associated with ecological well-being and animal rights, whereas in India and other world regions religious norms, considerations of purity and traditional culinary cultures are more significant [6, 24]. Greater global descriptions of the prevalence of vegetarian and vegan also show vast differences in the proportion of plant-based customers and in social opinions of such diets. To the researcher, a systematic comparison of motives, barriers and social stories across cultures may identify which marketing leverages are universal (as in taste and price) and which are highly local (as in religious framing, masculinity norms or national identity). To practitioners these insights aid in more culturally informed positioning, whether it is the packaging of vegan offers as an addition to pre-existing plant-based culinary traditions or as an emerging and ethical and environmental decision in more meat-focused markets.

Lastly, this discussion encourages both academics and professionals to pay close attention to the question of vegan foods in non-vegan spaces- places where the default pronouncement is still meat. Interventions in cafeterias and restaurants have demonstrated that even without a dramatic transformation of the vegan dish into a default menu, with meat being served on-demand, a significant amount of plant-based decisions can still be made, even among diners who are not vegans. Recent studies on cafes and restaurants that offer plant-based foods also indicate that the demand is currently increasing among non-vegan consumers, particularly younger urban customers, yet most are still prevented due to problems with accessibility, menu development and perceived social risk [7, 9]. It makes an interesting agenda: scholars study how the default structure, menu wording and social indications change in mainstream restaurants throughout the years and practitioners do small-risk experiments, such as vegan alternatives to mainstream restaurants, themed evenings or other promotional deals, to make these alternatives seem normal without turning off their main clientele (i.e. meat-eaters). Combining these five concepts can provide an effective and timely roadmap toward future work, which not only studies the vegan market, but also builds the road towards its inclusive and effective future.

V. CONCLUSION

This work is a synthesis of various threads of research that demonstrate that the vegan food markets do not represent the presence of one fixed so-called green consumer, but instead display the fluctuating combination of flexitarians,

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omnivores and hard-core vegans that respond to products, labels and environments in highly dissimilar ways. It attempts to combine evidence on sensory expectations, price perceptions, social norms, trust and cultural context which makes the argument why even very innovative plant-based products may fail without being placed within the context of household negotiations, food culture of regions and daily eating situations. It is stressed in the discussion that strategic performance in this space will require them to go beyond generic health and sustainability messaging to more specific levers: segment-specific offerings, psychologically informed label designs and considerate introduction of vegan options into mainstream channels rather than commit to niche channels.

Meanwhile, the review contends that researchers and practitioners have a never-before-seen chance to co-determine how vegan foods transition into long-term normalisation in worldwide diets, as they are adopted. The five concepts evolved here AI-enabled consumer segmentation, family decision-making in mixed-diet families, experimental research into the psychology of label design, more cross-cultural comparisons and close examination of vegan food in non-vegan environments can contribute to a progressive version of a toolkit instead of a recipe. All the ideas welcome the collaboration between marketing, behavioural science, nutrition and policy, and the combination of all these ideas leads to a more nuanced, evidence-based approach to the development of vegan markets that takes both commercial realities and social and environmental ambitions into account.

This base can be developed by future work to go beyond isolated case studies to more integrated and multi-method programmes of research which track consumers, families and institutions over time. The longitudinal and experimental designs and AI-powered analytics could be used to determine how segments change and how household negotiations change and how various labelling standards or default structures redefine demand in accordance with the growing prominence of and decreasing cost of plant-based options. Cross-country projects where high-income and emerging markets are explicitly compared will also be of particular use in isolating common drivers and local ones, and assist practitioners to create vegan offerings that still seem globally competent and locally grounded.

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