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SUMMARY

Outlook and Opportunities for the Vegetarianism Trend in the Food Trade

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Problem

Globally, the number of people who decide on a vegetarian diet and then also consistently practice it is increasing. The question is whether this indicates a turning point for nutrition in the future. Vegetarian associations are convinced that the number of vegetarians will rise significantly over time and that the increase will be unstoppable. Young consumers in particular are abstaining from the consumption of meat more and more frequently, and will continue to follow this nutrition trend in the future. In this regard, great market potential can be identified, especially for vegetarian products tailored to a young target group. Therefore this thesis attempts to survey the current vegetarian product market – including both the supply and the demand – in order to determine the development tendencies of vegetarian products and of meat alternatives in particular. The goal is to determine what market potential can be derived from the ongoing change in consumer behaviour. For companies that produce or distribute vegetarian products, the results of this thesis could represent an important information base or decision aid. The trends and current developments in consumer behaviour shall be illuminated in order to derive possible measures.

Structure of the Thesis

First, the term **vegetarianism** and the form of human nutrition it represents is explained. As a result, the various types of vegetarian nutrition are classified. The reasons and motivation of the people who decide on a vegetarian lifestyle are also explained in greater detail. In addition, the difficulties related to a vegetarian lifestyle are illustrated in order to obtain further insight into the topic. Furthermore, the historical development of vegetarianism is explained. This explanation goes back to ancient Europe and the era of the founders of vegetarianism. The historical examination extends to the age of industrialization and describes the founding of

vegetarian associations in Europe. In order to obtain an overview of the number of vegetarians, the global proportion of vegetarians in the population is illustrated. The thesis illuminates the dynamic changes in consumer behaviour in regards to meat products – how the image of meat underwent a change in our society over time, and what reasons triggered this change. The nutritional behaviour of Austrians is examined in greater detail and explained based on a study. In this context, the reasons for modified consumer behaviour in regards to meat products are explained. Accordingly, the main reasons for changes in consumer behaviour in regards to animal products are identified based on an international study.

A focal point of this thesis illuminates the vegetarian market and the factors that influence the development of this market. In this regard, special attention is paid to vegetarian meat alternatives. Accordingly, the empirical section explicitly deals with vegetarian meat alternatives. Various meat alternatives available in the market are explained in order to provide the reader with an overview. The declaration of vegetarian products represents another topic. In particular, the vegetarian seal of approval is discussed. Furthermore, the development of vegetarian products in the future is explained based on relevant technical literature. POS marketing is another focal point of this thesis. Increasing competitive pressure is forcing the industry to employ more effective, efficient advertising methods at the POS. Therefore, the theoretical POS fundamentals are explained in more detail.

The results of the online survey and the expert survey are summarized and analyzed in additional sections of the thesis. The purpose of the entire work is to identify the outlook, opportunities, and potentials for improvement in the vegetarian market. The goal is to provide in-depth insight into the related problems. Furthermore, consumer demands that have not been considered or perceived to date are to be clarified.

Method

For one thing, this thesis attempts to use an online consumer survey of vegetarians to determine the level of satisfaction with current offerings of vegetarian, plant-based meat alternatives and the potential for expanding the selection. This should allow the potential for improvements to be identified in order to meet customer requirements in regards to vegetarian products in the future. The results of the online survey should clarify consumer needs and requirements and therefore identify gaps in the current product selection. Furthermore, expert interviews were conducted in the food trade. The goal was to illuminate the current market for vegetarian products, to determine the attitude of the experts towards the changes in consumer behaviour, and to see how they are addressing these trends. Furthermore, the experts were asked about the future measures in regards to marketing vegetarian products.

Results

Over the course of the last few years, meat alternatives were able to evolve from a marginal product to a staple. Rising sales numbers clearly identify the trend in consumer requirements. The increasing level of health awareness in our society and rising number of people who want to reduce or completely eliminate meat consumption are forcing the food industry to offer new alternatives in the market and

therefore meet consumer demands. Furthermore, the vegan form of nutrition was able to establish itself in our society and continues to spread steadily. The expert results show that semi-vegetarians, who abstain from meat consumption mainly for health reasons, represent a key target group. Vegetarians desire an expanded assortment or a larger selection of vegetarian products. The majority of vegetarians surveyed do not purchase meat alternatives because they are not available at all grocery stores. The vegetarians indicated demand for a large selection of vegetarian products. If vegetarian products such as meat alternatives were offered in all supermarkets and discount stores instead of just health food stores and specialty stores, vegetarians would purchase these products more frequently.

Vegetarian products are severely under-represented in supermarkets and discounts stores in particular. Definite communication deficits with customers were identified. The POS represents the most important and decisive factor for sales promotion. Not only do vegetarian products get lost in the array of products represented in the market, they are also advertised very little or not at all. Vegetarians clearly identify the demand for clear positioning in order to make the products easier to find. Almost all vegetarians surveyed feel that there is no significant advertising for vegetarian meat alternatives. Both producers and the retail trade are aware of the POS deficits and see clear potential for improvements in this regard. Improved marketing at the POS could reduce the inhibition threshold for these products and therefore increase their level of familiarity.

The identification of vegetarian products with the vegetarian seal of approval represents an important purchase criterion and also indicates mutual trust. The majority of vegetarians indicated the urgent need for improvements in this regard. Only clear, uniform product identification that can guarantee pure vegetarian products can meet consumer requirements. The vegetarian seal of approval and the vegan flower are well known among the vegetarians surveyed. These seals of approval could guarantee a purely vegetarian product and therefore represent the optimal solution. The importance of product identification is recognized by the producers and the retail trade; they see themselves forced to meet these consumer demands. The results of the online survey indicate that women between 20 and 40 are increasingly consuming meat alternatives. These results delineate a potential target group for vegetarian products. Furthermore, it was determined that more highly educated people tend more towards vegetarianism. This can be explained by the fact that more highly educated people tend more towards healthy nutrition and that ethical aspects find greater acceptance in more highly educated layers of society. Vegetarian parenting also plays a decisive role in nutritional behaviour. The majority of vegetarians pass their choice of a vegetarian diet on to their children. But even those who currently do not have children want to raise their children as vegetarians in the future. In this regard, both parenting behaviour and the social environment of a vegetarian play an important role for the future of vegetarianism. The results show that most vegetarians share their home with persons who are also vegetarians.