



Facultad de Ciencias Económicas y Empresariales
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Analyzing the Market of American Vegan Energy Snack Bars through Max-Neef's Framework

Autor: Maria Guadarrama Hernandez
Director: Estela Maria Diaz Carmona

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1. Abstract

With the rise of snack culture and the rise of veganism, certain factors can be observed as to why this is occurring and how markets are reacting to this. The purpose of this thesis is to understand how vegans' snacks, specifically vegan energy snack bars, are covering consumer needs through Max Neef's framework. This research paper undertakes two methods to understand the broader impact of this investigation: first, a literature review to set the fundamental theoretical basis for understanding the topic. Secondly, an analysis of three American brands using Max Neef's framework to understand fundamental human needs that are covered by such products. The results of this study show that both the vegan and snack market overlap in growth and social-cultural movements have impacted greatly. It also shows that depending on the brand's personality and market strategy, priorities shift and yet cover all the necessary needs. This leads to the conclusion that other brands must focus on creating the relationship between a product and a consumer's values, by meeting all the fundamental needs of Max Neef's Framework, to successfully retain the relationship. This study is limited due to the selected sector of snacks and because of secondary data. One recommendation is to conduct this study in different countries, so as to not limit it only to the USA and therefore extending the benefits of this research.

2. Resumen

Con el auge de la cultura de los snacks y el auge del veganismo, se pueden observar ciertos factores que explican por qué está ocurriendo esto y cómo están reaccionando los mercados ante ello. El objetivo de esta tesis es comprender cómo los snacks veganos, en concreto las barritas energéticas veganas, están cubriendo las necesidades de los consumidores a través del marco de Max Neef. Este trabajo de investigación lleva a cabo dos métodos para comprender el impacto más amplio de esta investigación: en primer lugar, una revisión bibliográfica para sentar las bases teóricas fundamentales para comprender el tema. En segundo lugar, un análisis de tres marcas estadounidenses utilizando el marco de Max Neef para comprender las necesidades humanas fundamentales que cubren dichos productos. Los resultados de este estudio muestran que tanto el mercado vegano como el de los snacks se solapan en crecimiento y que los movimientos socioculturales han tenido un gran impacto. También muestra que, dependiendo de la personalidad de la marca y de su estrategia de mercado, las prioridades cambian y, sin embargo, cubren todas las necesidades necesarias. Esto lleva a la conclusión de que otras marcas deben centrarse en crear la relación entre un producto y los valores de un consumidor, satisfaciendo todas las necesidades fundamentales del Marco de Max Neef, para mantener con éxito la relación. Este estudio está limitado por el sector seleccionado de los aperitivos y por los datos secundarios. Una recomendación es realizar este estudio en diferentes países, para no limitarlo sólo a EE.UU. y ampliar así los beneficios de esta investigación.

3. Key Words

Snacks, Vegan, Energy Bars, Max Neef, Strategies

4. Introduction

Veganism has become a mainstream topic in today's society, more than ever before. This topic is amidst various conversation because of its impact economically, socially, and politically. This social movement is empowered by modern day trends, technology, and moral obligations. This is a concept that has developed overtime and has shifted groups of people, ultimately resulting in companies having to act and to respond. This is also closely tied in with snacking culture, another topic that has made an impact on society and has overall develop over the years as well. From having 3 fuller meals, to have more frequent small meals or "snacks", it has impacted the way companies sell and advertise products.

While both of these markets overlap, there seems to be a gap in the literature, this can be assumed because of the recent growth of such markets. What's important to solve is how brands and companies are now competing in this relatively new sphere and how this information can transcend across different segments of business.

Within this research paper you will find general information about both of these markets to develop a general understanding of what is going on and why. You will also find how applying a framework of needs is also beneficial to constructing the bigger picture of what's going on the market. Overall, the aim is to provide understanding and ideas moving forward with this type of research.

5. Objectives

The primary and general objective of this paper is to analyze the growth and trends in the vegan snacks market. To achieve this, several sub or specific objectives, contribute to the core analysis, which are outlined below:

1. Understanding the different definitions for key terms such as “vegan”, “snack” and “vegan labeling” to see the effects on brands.
2. Explore the brand identity and image of leading vegan energy snack bar brands, focusing on their visual identity, brand values, and the narratives they use to connect with their audience.
3. Analyze the specific human needs that vegan energy snack bars aim to satisfy, as conceptualized by Max-Neef's Needs Framework.

6. Methodology

In the first part of this research paper, the literature review will establish a theoretical foundation to understand the broader markets for snacks, veganism, and vegan snacks. This is an important section because it will provide theoretical basis for understanding the markets along with more background information to assist. Once the general dynamic of the market are understood, the second part of the paper will be conducted.

The second part of the paper will narrow the focus to the vegan energy snack bar segment, a rapidly growing category within the broader market. This detailed analysis will examine how these specific products meet consumer needs and how brands use targeted marketing strategies to resonate with their audiences. The purpose of this section is to analyze how vegan energy snack bars address consumer needs, and why certain needs might remain unmet.

The second part consists of a brand analysis of three leading American vegan energy snack bars, selected based on their high purchase counts and positive reviews on Amazon. This focused analysis will provide insights into both consumer needs and brand strategies within the vegan snack market.

To guide this research, Max-Neef's Needs Framework will be applied in part two to evaluate how vegan energy snack bars meet specific human needs, while brand personality archetypes in part one will help us understand how the brand identities of these leading vegan snack brands resonate with consumers.

As mentioned throughout literature, energy bars have become increasingly important and popular in recent years due to their convenience and nutritional balance, occupying a larger share of the consumer market. These bars come in various forms and are known by different names, including protein bars, cereal bars, snack bars, diet bars, granola bars, nutraceutical bars, health bars, whole food bars, and fiber bars (Ananthan et al., 2021). This goes to show the importance of focusing on the vegan energy snack bar segment as it represents a growing overall vegan snack market. It will provide insight on marketing strategies and understanding consumer needs.

7. Literature Review

7.1 Snacks

7.1.1 *What is a snack?*

The concept of “snacking” has become increasingly popular and dominant over the years, with a shift in eating patterns from three fuller meals to smaller and more frequent portions (Chaplin & Smith, 2011). Although it is a popular term, there is no universally agreed-upon definition of “snacking” (Hess et al., 2016). Due to the lack of a concise and clear definition, there are multiple perspectives and opinions as to what truly constitutes a “snack” and what kind of snacks can be considered healthy, unhealthy, or even the types of food choices that constitute a snack (Hess et al., 2016).

This begins presenting challenges for guidelines, specifically for nutritional and dietary purposes. Clouded terminology, leads consumers to misunderstandings or confusion about products. Another influence that can be seen, is the difference between a “meal” and a “snack”, because such labels can significantly influence the food choices of an individual during an eating occasion (Hess et al., 2016). Some studies show that is hard to achieve any kind of consistency within data due to these vague definitions, which has led to trying to reclassify eating times, foods, and other factors (Hess et al., 2016).

Even though there is no set definition for “snacks” and “snacking” there are snack types or categorizations. Classifications of such products can be done in many ways, either by calories, ingredients, sweet, salty, healthy, unhealthy, etc (Hess et al., 2016). The table below shows a common way to classify snacks and some examples:

Table 1: Types of Snacks (Hess et al., 2016)

Savory Snacks	Meat, Popcorn, Fruits & Nuts
Sweet Snacks	Chocolates, Cookies, Fruits
Healthy Snacks	Fruits, Veggies, Yogurt
Functional Snacks	Diet, Low Calorie, Protein
Regional Snacks	Asian, Latin, African
Beverage Snacks	Smoothies, Juices
Indulgent Snacks	Gourmet & Artisanal
Convenience Snacks	Pre-portioned

These are not limited to one individual classification and as can be seen, they overlap. It is actually more common to overlap than to be in one category itself, and that is due to consumer preferences, needs, and purpose (Hess et al., 2016). Overall snacks don't have a set standard and can be classified in various ways (Hess et al., 2016).

Factors Influencing Snacking Behavior

There are various factors that lead to the habit of snacking, and as found through a literary review, those factors include hunger, location, social and cultural environment, cognitive factors, and hedonic eating (Hess et al., 2016).

Hunger is the leading factor for snacking, however, if snacking when the absence of hunger occurs, then it is referred to as unhealthy due to the observation that foods with higher sodium (salt) and fat are consumed (Hess et al., 2016). Location is also important due to it affecting food choices and portion sizes (Hess et al., 2016).

With location as a factor in mind, it leads to thinking about how social and cultural environment affects "snacking" overall. Dietary guidelines vary by country and it is obvious that different definitions come into play here. Some examples of this can be seen below:

Table 2: Snacking Guidelines (Country Variation)

United States of America	Snacks should amount to 300 calories a day for a healthy balanced intake. (Dietary Guidelines for Americans, 2024)
Australia	The Australian Dietary Guidelines rely on a definition of snacks as a category of discretionary foods (“snack foods”) to be consumed in limited amounts. The guidelines mention that “legumes, nuts, and seeds can be eaten as snacks” (ADG, 2024)
Brazil	Brazil’s Dietary Guidelines discourage snacking between meals but suggest that individuals with higher energy needs consume small meals of fruit or “milk, yogurt, or nuts” (MHB, 2014)
Canada	Canada’s Food Guide recommends limiting salty snacks and eating vegetables and fruit for snacks. For women of childbearing age, their guide encourages fruit and yogurt for snacks. (Health Canada, 2010)
France	Le Guide Alimentaire Pour Tous recommends consuming a regular snack instead of eating mindlessly or snacking continuously. For snack foods, this guide recommends yogurt, milk, fruit, fruit juice, vegetables, or some bread with butter or jam (LGA, 2015)

This further shows that there is no universally accepted definition for a snack and for how it is perceived. Due to different guidelines around the world, it is clear that social and cultural factors influence the consumption of food and snacks.

All of these factors combined still leave the concept of “snacking” as an intangible due to the lack of concise agreement of information. What can be concluded is that a snack can be

defined as a variety of things ranging from healthy to non healthy options and typically are in smaller portions.

Health Implications of Snacking

One key aspect that's related to snacking, is the health portion of the conversation. Many sources show that there might be a potential link between weight and health. The idea that excessive consumption of snack foods is an important cause of obesity is prevalent in the literature (Johnson & Anderson, 2010).

As seen above in the country regulation table, some countries such as Brazil and France, discuss limiting the quantity of snack intake. This directly ties to the idea that too much snacking is “unhealthy” or not ideal for long-term health.

Many papers or sources typically develop their dietary recommendations after analyzing the definitions of “snack” and “snacking” (Johnson & Anderson, 2010). Topics such as eating frequency, food clusters, limitations, and others are directly linked to the conversation. Due to the lack of definition, much of the conversation is just speculation and assumption, however, more and more health implications are being linked to snacking such as diabetes (Johnson & Anderson, 2010). Such implication has allowed for bigger discussion surrounding the setting of standards for snacks, however, that is a conversation that is still being discussed today (Sergio O. Serna-Saldivar, 2022).

7.1.2 Snack Market Overview

The variety of snack foods that derive from different ingredients such as grains, fruits and vegetables, meat, milk, etc. are one of the biggest industry segments in the world (Sergio O. Serna-Saldivar, 2022). The industry itself is growing and evolving to try and satisfy consumer needs.

There has been a rise in “functional foods” and “convenience foods” over the years, promoting a healthier food choices and moving towards the popular trends that resonate with the public (Sergio O. Serna-Saldivar, 2022). Convenience foods have had a rise in the market for various reasons, one being that is it time saving (Stranieri et al., 2017). Snacks are considered convenience food for their easy to go characteristics as well as their simple consumption process.

In the United States, over 90% of adults snack daily (Okpiaifo et al., 2023). While the overall frequency of snacking has increased over the years, the consumption of vegetables, fruits, etc.

and therefore raising health concerns that are possibly linked (Okpiaifo et al., 2023). The overall snack market has shifted and evolved towards health-conscious choices as well as convenience options (Okpiaifo et al., 2023). One study shows that there are growing concerns regarding unhealthy snacks and its link to health issues (Okpiaifo et al., 2023).

In response to this negative impact that unhealthy snacks have, there has been an increase in the promotion of healthy snacks, specifically fruits, veggies, and organic products (Okpiaifo et al., 2023).

Consumer acceptance of novel food products, including healthy snacks, varies greatly. Factors such as emotions, trust, perception of naturalness, food tech, sensitivity in relation to disgust, cultural factors, and personality traits like openness and enthusiasm all play a role in consumer acceptance. Preferences for healthy snacks are also affected by demographic factors like age, gender, education, and lifestyle. Other factors like the perceived healthiness of the product, price, taste, and psychological factors like health consciousness are also important. As a result, there is a growing focus on developing and promoting vegetable-based functional foods and other healthy snacks due to their high nutritional value. Research shows that as consumers become more aware of the health benefits of healthy snacks, their demand for these products increases (Okpiaifo et al., 2023).

By taking a look solely at numbers, the global snack market is projected to grow by roughly 10% over the projected 10 years from 2019-2029 (Statista, 2022). Broken down by country, majority of the revenue that comes from snacks is delivered by the United States with 129.14 billion USD, and second place is China with 106.78 (Statista, 2022). While China and the United States both have huge parts in the world snack market, countries such as Russia, Japan, and Germany have nearly a fifth of that (Statista, 2022). This comes to show that while the projection of snacks increases over the year, the dominant players remain two of the biggest markets in the world, China and the United States. This further goes to show that the snack market is growing overall and with the influence of two big states, other countries adapt to the market.

7.1.3 Snack Marketing Strategies

Research shows that brands with stronger brand identities are able to build a better relationship with the consumer (Candice Roberts, 2010). Food marketing strategies revolve around commercial communications that are specifically designed to boost appeal and the consumption of products (Sato et al., 2022). Various channels like social media, television,

packaging, and incentive based promotions, are used to further attract consumers to the brand products (Sato et al., 2022). Packaging is a key part in this promotion strategies because a brand must appeal to various senses of the consumer. Everything from colors, information, font, size, etc are part of the brand’s personality and ultimately the brand strategy to sell more (Sato et al., 2022).

Marketing snacks is done in many various ways, from children’s snacks with toys to adult or more mature snacks with more nutritional information (Candice Roberts, 2010). Common strategies applied by brands in order to market revolve around making sure brand archetypes are strong, color palates suit the consumer, and nutritional information is correctly displayed.

Brand archetypes are important because they establish differentiation amongst their competitors and create meaningful connections with consumers (Haddad et al., 2015). There are multiple brand archetypes types that a brand may use, ranging from an innocent archetype that promotes simplicity and optimism to a creator archetype that embodies innovation (Margaret Mark & Carol Pearson, 2001). These archetypes are applied in a snacks marketing strategies by focusing on key aspects of their brand personality as seen below:

Table 3: Archetypes (Margaret Mark & Carol Pearson, 2001)

Innocent	Brands convey natural ingredients and emphasize labels such as non-gmo or organic.
Explorer	Gives a sense of new and exotic, particularly for new flavors or even on the go snacks to encourage active lifestyles.
Sage	A brand is able to focus on educating consumers about a product and focuses on facts.
Hero	Idea of empowerment through energy and lifestyle, most applicable to sport snacks.
Outlaw	Promotes stepping outside the norm and markets bold or unique products.
Magician	Conveys the idea that a snack product will give them a new and magical experience through either sensory or taste.

Regular	This is used for everyday conventional snacks that are comforting.
Lover	Typically used for higher end snacks that are encouraged to be shared like higher end chocolate snacks.
Jester	This is primarily used towards children, and snacks are seen as fun and exciting through flavors or packaging.
Caregiver	Aimed at parents or adults looking for safe choices in snacks whether it's ingredients or safety aspects.
Creator	Typically, applicable to gourmet products and snacks for promoting unique combos or innovation.
Ruler	Emphasize luxury, exclusiveness, and an attitude of best quality for snacks and products.

The Hero and the Outlaw: Building Extraordinary Brands Through the Power of Archetypes (2001)

Overall each brand personality resonates with at least one brand archetype and often times two or three depending on product variation (Margaret Mark & Carol Pearson, 2001). Snack marketing has evolved over the years across more channels as social media and technology is on the rise. New and innovative ways to market snacks will surely come to exist, in the meantime, these are some of the ways snacks are marketed today.

7.2.1 Veganism

7.2.2 Definitions

Veganism, as defined by the Vegan Society, " is a philosophy and way of living which seeks to exclude—as far as is possible and practicable—all forms of exploitation of, and cruelty to, animals for food, clothing or any other purpose; and by extension, promotes the development and use of animal-free alternatives for the benefit of animals, humans and the environment. In dietary terms it denotes the practice of dispensing with all products derived wholly or partly from animals" (Vegan Society, 2022).

With this definition, multiple things can be seen, and the main idea being that veganism is a philosophy and way of living, it extends more than just not eating animal products. Veganism seeks to exclude and all forms of harm and exploitation to animals in regard to food, clothing, and any other purpose that they may be used for. Veganism also promotes the creation, development, and implementation of animal-free alternatives because the idea is that it benefits all humans, animals, and the environment (Vegan Society, 2022). Of course, as many people know veganism, it is the avoiding of eating or consuming any products that derive from animals.

Veganism as a concept has become more and more popularized in western countries over the years (North et al., 2021). There are many reasons for the rise of veganism, many of which pertain to social justice for animals (North et al., 2021).

This, however, is not the only definition for veganism and while many are similar in terms of not consuming animal products, some definitions focus more on the animals while other ones on diet (North et al., 2021). Overall there is not one single definition agreed on by all vegans, this leads different advocacy groups having their own narrative (North et al., 2021). The table below shows various definitions of veganism in western countries:

Table 4: Vegan Definitions (Country Variation)

United Kingdom	“Veganism is a way of living which seeks to exclude, as far as is possible and practicable, all forms of exploitation of, and cruelty to, animals for food, clothing or any other purpose.” (UK Vegan Society, 2018)
United States	“Vegans don't consume red meat, fish, birds, cow or goats milk, eggs, honey, or foods made with any of these other animal products such as gelatine, or animal broths. Vegans don't wear silk, leather, wool, or fur. Vegans avoid products tested on animals, and avoid sports or entertainment including animals (e.g zoos, horse racing).” (US Vegan Society, 2018)
Ireland	“Vegans do not use anything that comes from an animal. Vegans eat a 100% plant-based diet, wear shoes, accessories and clothing that are not made of animal skin or hair. Vegans use cosmetics, personal care and household products that are free of animal testing and ingredients. Vegans also choose forms of entertainment that do not use animals.” (Vegan Ireland, 2018)
Australia	“Veganism is a social justice movement that is striving to bring about a world where animals are not exploited for food, clothing, entertainment or any other purpose” (Vegan Australia, 2018)

All of these definitions have the same goal in the end, which is to move away from animal-based products, the variation is seen in regard to social and environmental importance.

7.2.3 Concept

The concept of veganism has been on the rise over recent years, and as mentioned above, has gained a lot of traction throughout western countries (North et al., 2021). However the evolution of the term “vegan” and “veganism” has been amplified by corporate advocacy, framing in the media, and high-tech development (Sexton et al., 2022a). It is also seen as a lifestyle movement and in some cases not as a political protest, although political notions exist (Nina Gheihman, 2021). The mainstreaming of veganism is seen as a cultural movement (Cherry, 2006). It based on individual consumption along with overall philosophical goals (Nina Gheihman, 2021).

While this may be the modern take on veganism, the concept itself is nothing new, originating from ancient Jainism and Buddhism tracing back to the 6th Century BCE (Noah J. Wescombe, 2019). Originally it was driven by spiritual aspects and has now evolved into modern veganism with material concerns and particularly emphasizing animal suffering (Noah J. Wescombe, 2019). Philosopher Peter Albert David Singer played a big part in modernizing veganism due to his work on preference utilitarianism which allowed the questioning of animal suffering in traditional manners (Noah J. Wescombe, 2019).

Carnism or the idea that meat is a necessity to consume has been ingrained in human history from the beginning. As we know, meat is nutrient dense and packed with vitamins, this is why majority of people still consume meat products (Noah J. Wescombe, 2019). However, societal norms are shifting and veganism is on the rise due to the cultural, economic, and political considerations it highlights (Noah J. Wescombe, 2019). Veganism confronts many challenges such as carnism, and raises questions about moral and systematic adaptations of such philosophy (Noah J. Wescombe, 2019).

Today, media alongside influencers and celebrities have allowed for more normalization of such lifestyles and diets, whether they claim it is for moral or dietary reasons (Cherry, 2006). As veganism continues to grow more and more people begin adapting their preferences and even corporations are stepping in to deliver vegan products as it is now a mainstream topic (Sexton et al., 2022a).

7.2.4 Reasons to be Vegan

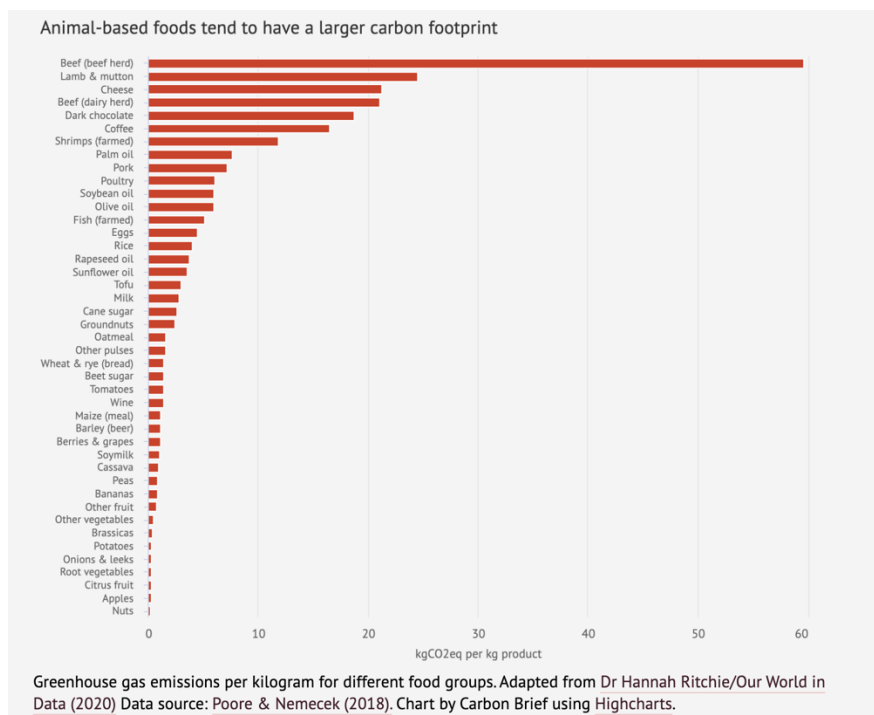
There are three reasons people turn to veganism and it has to do with animal rights/humane treatment, environment/sustainability, and health concerns (Sarah E. Mann, 2014).

In relation to health reasons, a study showed that vegans have lower cholesterol (Bradbury et al., 2013) and blood pressure (Pettersen, Anousheh, Fan, Jaceldo-Siegl, & Fraser, 2012), as well as reduced risk of cardiovascular disease (Spencer, Appleby, Davey, & Key, 2003) and diabetes (Tonstad, Stewart et al., 2013). This is very appealing to people who want to lose weight, be healthier, make better choices, and ultimately want change.

Animal rights are at the center for vegan activist groups with bringing up concerns of animal treatment in factory plants (Linda Kalof (ed.), 2014). There is a difference between animal rights and the abolition of animal plants. Due to the different groups of vegans, some vegans advocate for animal rights because of the “respect” for those who live different lifestyles and there are those who seek the abolition of animal use overall (Linda Kalof (ed.), 2014). Those who rally for animal rights or animal liberation, tend to rally behind organizations such as the Humane Society in the US and the Royal Society for the Prevention of Cruelty to Animals in the UK (Linda Kalof (ed.), 2014).

Environmental concerns are directly tied to animal treatment, one example is the amount of methane released when slaughtering cattle. Beef is the biggest food that release greenhouse gasses into the atmosphere (Statista, 2021). The emissions from producing beef are higher than the emissions of planes, cars, and all other forms of transport put together (University of Oxford, 2017).

Figure 1: “Animal-Based Foods tend to have a larger carbon footprint”



Environmental concerns are real and quite prominent in today's political and economic sphere. It is a reoccurring conversation, and vegan advocate that veganism is one solution to making the environment better.

All of these motives are the reason that people go vegan and these reasons are popularized more and more through modern day media.

7.2.5 Labels

Developed countries have regulations that explain or dictate the required information on food labels. When carefully designed, these labels can positively impact the national diet and patterns of how people consume food (Temple & Fraser, 2013). Generally, labeling regulations apply primarily to food sold in packages, such as cans or cardboard boxes or any containers that have enough surface space. In contrast, many foods not packaged by the manufacturer, like fresh meat and fish, do not require labeling however they include nutritional facts (Temple & Fraser, 2013).

Labeling can become a confusing part of a product for a customer due to the high number of labels that can apply to a product (Temple & Fraser, 2013).

Two kinds of labels are common:

Front-of-package (FOP) labels, which provide consumers with the brand name and type of food. These labels can also include details regarding the food's composition or structure, such as being a "good source of fiber," or health claims like "diets low in total fat may reduce the risk for some cancers" and even "non-GMO" claims (Temple & Fraser, 2013).

Back-of-package (BOP) labels, which include a Nutrition Facts panel, which is standard, and presents the nutritional structure of the food. To help consumer understanding, these labels more than likely express nutrient quantities as a percentage of recommended daily intake (known as Daily Values in the United States and Canada). Furthermore, BOP labels list the food's ingredients, arranged by quantity, and have the primary ingredient listed first (Temple & Fraser, 2013).

When it comes to labeling vegan food, there are various ways to label, and it varies by region/country. The following image shows different vegan labels from around the world:

Figure 2: Vegan Labelling (Plantiful Health, 2024)

<https://plantifulhealth.com/vegan-how-to-reading-labels/>



As shown above, there are many variations of labels which can become confusing due to what qualifies a product as vegan. Many of these organizations have slightly different requirements, fees, and validity to provide the vegan seal. Ultimately it can be seen that there is no industry guideline set for all, therefore sometimes consumers get confused or distrusted (Marielle Gerke & Meike Janssen, 2016).

Other labels specifically the claims can become a lot for the consumer's eyes as brands try to seal their best points. Moreover, and of greater significance, further research is required to determine which food label designs are most successful in encouraging consumers to opt for healthier food choices. (Temple & Fraser, 2013)

7.2.6 Vegan Product Market and Evolution

The rise of the vegan market is due to increase of people adapting to vegan lifestyles or following health trends and purchasing more vegan products (Kristina Bäckström et al., 2023). Even if people are not adapting to vegan lifestyle, they are reducing the consumption of animal products such as vegetarians and flexitarians (Kristina Bäckström et al., 2023). To

cater to this movement, companies are developing products especially for vegans and typically are labeled vegan to stand out for designated consumers or those seeking such products (Kristina Bäckström et al., 2023). According to the book “Future of Consumption”, it uses Martin and Schouten’s theory of consumption-driven market emergence (CDME) to explain veganism’s growth as a consumer-driven movement and market.

The Consumption-Driven Market Emergence (CDME) theory outlines a three-stage process in which new markets emerge and stabilize (Kristina Bäckström et al., 2023). The first stage, emergence, happens when individuals innovate or modify existing products to meet new needs or preferences requested by consumers or large groups of individuals. The second stage involves the growth of already present entrepreneurs who recognize the potential of these innovations and work hard to further develop and expand the market. Finally, the third stage is market catalysts, where recognized infrastructures and highly developed systems are established to support and help stabilize the growing market, which in this case allows modern technology to create products for a wanting consumer base (Kristina Bäckström et al., 2023).

CDME represents a bottom-up, community-driven process. The rise of veganism can be seen as a perfect example of CDME in action and growing (Kristina Bäckström et al., 2023). The vegan community and organizations actively support the market growth through lifestyle adoption, effective and informative communication, and conscious consumption choices all around such as clothes, food, and regular items. The success in this area relies heavily on individual decisions that embrace personal and collective well-being but also challenge and provide alternatives to established societal norms such as carnism (Kristina Bäckström et al., 2023). This social and cultural movement demonstrates how consumer agency can lead to significant and pivotal shifts in market landscapes, in turn promoting sustainability, ethical considerations, healthier choices, and mainstream consumption patterns such as the vegan market (Kristina Bäckström et al., 2023).

Vegan consumption is guided by ethical reasons and shaped by these considerations. Even though the market has been defined for a long time, the growth of the vegan space and market stand strong against these imposed market structures. This emergence of the vegan market has led to new labels, certifications, and claims that help consumers identify vegan products (Kristina Bäckström et al., 2023). The commercial success of this market is due to the hard

work of the vegan population and advocacy that continues to educate the population and encourage others to keep an open mind (Kristina Bäckström et al., 2023).

7.3 Vegan Snacks

Vegan snacks have emerged out of both the rise of snacking over the years and the rise of the veganism movement that has also been popularized (Le, 2019). Vegan snacks, however, still remain a niche topic due to the lack of literature review and widespread knowledge. As mentioned above, the term “snacking” does not have a defined standard of a definition. The definition for “veganism” or “vegan” is also something that is not universally agreed on. Both of these terms are crucial for defining vegan snacks and therefore complicate the existence and understand of such products.

What is known, is that vegan snacks do exist and are marketing in various ways because there is no set guideline. As discussed above, the dietary health trends that have emerged and become popularized are non-gmo, vegan, organic, gluten free, eco-friendly, etc (Sarah E. Mann, 2014). These labels all exist within the snacking industry and while some products may be vegan, they can also be advertised as “plant-based” which is not incorrect but allows for a consumer to develop a different mental image in relation to the product (Marielle Gerke & Meike Janssen, 2016).

One of the reasons it is difficult to find more information surrounding vegan snacks is the labeling. Some brands avoid using the word vegan because it is associated with a negative connotation and may influence consumers. Brands have different goals and sometimes those goals aren't necessarily to aid the vegan community but to sell more of their brand even though their items are vegan (Sergio O. Serna-Saldivar, 2022).

7.3.1 Necessities Covered

Vegan snacks encompass a variety of consumer needs ranging from health concerns, environmental concerns, and ethics concerns (Sexton et al., 2022b). Vegan snacks appeal to various consumer needs, and focus on health and ethical considerations (Sexton et al., 2022b). Literature highlights that vegan diets are associated with health benefits (Bradbury et al., 2013), such as lower risks of chronic diseases, making vegan snacks a convenient and nutritious option for those prioritizing well-being. Additionally, these snacks provide a sense or idea of protection because they are alternatives to animal products, and further align with consumers' desires to avoid the health risks linked to meat consumption and their desire to be more ethical (Bradbury et al., 2013).

Beyond wellbeing and health, vegan snacks also address the need for personal identity, as they allow consumers to express their ethical beliefs and align with communities and typically organizations that share similar values (Nina Gheihman, 2021). This is one way vegans advocate, by purchasing products that are advertised by certain groups in order to show support. Studies show that veganism is often tied to a strong sense of moral identity and social belonging, with vegan snacks playing a role in this cultural acceptance (Le, 2019). The act of choosing vegan snacks allows and pushes individuals to be part of a broader social movement, reinforcing their commitment to animal rights and environmental sustainability (Cooper, 2018).

Lastly, vegan snacks fulfill the need for understanding, creation, and freedom by offering consumers choices that reflect their values and lifestyles (Nina Gheihman, 2021). These products allow for unique dietary choices and research while also allowing the freedom to make informed, ethical, and educated decisions. As veganism becomes more mainstream (North et al., 2021), the growing availability of vegan snacks supports consumers in making choices that align with their personal, societal, and unique goals, which in turn contributes to a more sustainable and compassionate food system (Matt Pickles, 2017).

All of these needs fall under Max Neef's Framework.

8. Empirical Work

8.1 Manfred Max-Neef's Model of Human Needs

A model developed by Chilean economist and environmentalist Manfred Max-Neef. It is a conceptual model that outlines multiple fundamental human needs and the ways they can be satisfied. This framework is applicable to various fields including business, politics, and sustainability (Des Gasper, 2022).

The model is composed of three main components; fundamental human needs, satisfiers, and categories of needs (Des Gasper, 2022).

Eight to nine fundamental human needs are identified across cultures and different time periods (Des Gasper, 2022).

Table 5: Fundamental Needs (Des Gasper, 2022)

Subsistence	Food, water, shelter, etc.
Protection	Security, absence of fear
Affection	Love, emotional bonds
Understanding Participation	Critical thinking, knowledge
Idleness/Recreation	Rest, relaxation
Creation	Innovation, creativity
Identity	Sense of belonging, awareness
Freedom	Autonomy, ability to choose
Transcendence*	Spiritual, above material world

*Transcendence is added here provisionally. Max-Neef noted it but considered it had not yet sufficiently emerged to be included in the matrix (Des Gasper, 2022).

Satisfiers are the ways fundamental human needs are met, however, they vary by context whether it be cultural, economic, and even environmental (Des Gasper, 2022).

Table 6: Satisfiers (Des Gasper, 2022)

Singular	Address a single fundamental need, not impacting other needs.
Synergic	Addresses multiple needs at once, providing a holistic solution.
Inhibiting	Addresses one need temporarily yet hinders addressing other needs.
Pseudo	Addresses fundamental need on the surface or incorrectly.
Violators	Does not address fundamental need, instead harms other needs.

How fundamental needs are organized and interrelated, Max Neef distinguishes them as such:

Table 7: Categories of Needs (Des Gasper, 2022)

Axiological Needs	Eight to Nine Fundamental Needs
Existential Needs	Being, Having, Doing, Interacting

The application of this framework to business marketing can help determine consumer behavior and ultimately provide a pathway to develop and innovate products that fit consumer's needs. By taking this framework and applying it to products, it can show how fundamental needs are covered and what it lacks. This gives a more profound analysis to understand how the brand's marketing strategies can work on covering more or less needs to effectively communicate their products to the designated consumer group.

9. Case Study

9.1 Case 1: Brand NO COW

Brand Personality

Figure 3: NO COW Logo



Logo

The No Cow logo features a modern and clean design with a focus on simplicity and clarity. It often includes the brand name in bold, easily readable text, and occasionally incorporate visual elements related to plant-based themes such as the color green.

Story

Founded in 2015 by an 18-year-old named Daniel Katz, No Cow came from the young founder experiencing stomachaches every time he ate whey protein bars. He discovered he was lactose intolerant and created a product that was made from plant-based ingredients (*No Cow. No Bull. No Whey!*TM, 2024) It now caters a variety of products to consumers who are health-conscious and have dietary restrictions.

Values

This brand values sustainability at its core as well as transparency about the ingredients used to create their products (*Cow. No Bull. No Whey!*TM, 2024). They have a webpage dedicated to the four pillars of their sustainability beliefs that include product, people, packaging, and philanthropy (*Cow. No Bull. No Whey!*TM, 2024). They also provide information about their recyclable packaging from the container box to the wrapper around the snack bar.

Overall, it's dedication to creating a difference by making sure their products are dairy free, gluten free, vegan, and nutritious proves that their values transcend over into their care for consumers.

Product Range

They offer a variety of products that are dairy free, non-gmo, gluten free, soy free, and vegan. Their product line extends from protein energy bars, protein powders, and sweet treat referred to as “mighty treats” (*Cow. No Bull. No Whey!*TM, 2024).

Marketing Strategy

Target Audience

No Cow targets individuals who are health conscious, fitness enthusiasts, and those following a healthier diet such as veganism or due to dietary restrictions (*Cow. No Bull. No Whey!*TM, 2024).

Channels

In order to promote their brand, they use social media channels such as Instagram and TikTok, along with influencer partnerships. Relying on digital advertising is an effective way to connect with many people and consumers, while relaying the brand’s products and goals.

Brand Messaging

The brand communicates the benefits their products have such as being dairy free and having highly nutritious plant-based ingredients in their products. They also heavily communicate their dedication to environmental causes through color, information, and sustainable efforts done by the brand. Their promotional materials include compelling and exciting visuals that reassure the consumer of their high-quality products and alongside include testimonials or reviews about the products. This all ties together to reinforce their green and high-quality image by conveying their dedication and commitment to the wellness of the consumer.

Needs Addressed

Table 8: Application of Mas-Neef's Needs Framework to No Cow Brand

Fundamental Need	Description	How No Cow Addresses This Need	Not Addressed (X)
Subsistence	Food, water, shelter, etc.	Offer vegan bars that provide essential nutrients with a focus on healthy ingredients.	
Protection	Security, absence of fear	Promote ingredient transparency through effective labelling and sourcing information.	
Affection	Love, emotional bonds	Engages with surrounding communities, creating a welcoming feeling and of belonging.	
Understanding Participation	Critical thinking, knowledge	Provides educational information in regards to recycling and the effects on the environment.	
Idleness/Recreation	Rest, relaxation	N/A	X
Creation	Innovation, creativity	Offers products with important values and fun flavors.	
Identity	Sense of belonging, awareness	Consumers with similar identities find a space to express themselves.	
Freedom	Autonomy, ability to choose	Allows for consumers to make choices they feel confident about due to empowerment.	

9.1.2 Case 2: Brand GoMacro

Brand Personality

Figure 4: GoMacro Logo



Logo

The GoMacro logo is simple, sophisticated, and promotes an earthy design that reflects the brand's ingredients (GoMacro, 2023). It portrays a certain lifestyle that would be considered wholesome or warm. It uses a very simple and clear font that promotes that idea of trustworthiness and direct. Its logo also directly shows the environmental aspects of the brand as it shows the sun, grains, a foot, and a heart, all alluding to the authentic nature of the brand.

Story

The GoMacro brand has the environment at its center, and it is notably understood that it was founded with strong commitment in mind. The overall story centers around familial values that extend to those who purchase the products. Since the origin story focuses on a mother-daughter relationship, it shows the commitment it took to finding an energy snack bar that fit in with their macrobiotic diet (GoMacro, 2023). Part of their story transcends across their brand as a core part of it is their connection to health and well-being.

Values

"Bigger than a Bar" is their sole statement when arriving to their webpage, and it shows their commitment to those family-held values. The values of the brand are actually displayed on the back of the snack bar packaging and are the following; Live Long, Eat Positive, Give Back, Tread Lightly, and Be Well (GoMacro, 2023). The brand states that these are the pillars that make their entire foundation of what they do as a company.

Product Range

GoMacro offers a pretty large variety of products that are organic, plant-based, and vegan, while also focusing on their nutritional value and whole food ingredients. The range of products all have different flavors to cater to a wider range of people with different preferences for taste. They have energy protein bars, balanced nutrition bars, kid bars, variety packs, and minis (GoMacro, 2023).

Target Audience

The brand GoMacro targets individuals who are looking for a health-conscious option while holding the environment close as well. This target audience will prioritize plant-based options and will follow diets such as vegan, vegetarian, gluten-free and specifically macrobiotic diets. They will also be on the lookout for clean products that are transparent with their processes.

Channels

The GoMacro brand uses various channels to communicate with consumers, including but not limited to, Instagram, tiktok, collaborations with influencers, and community events they attend or host (GoMacro, 2023). On their webpage they also communicate their story thoroughly from beginning to end and as well as the claims on their packaging.

Brand Messaging

The brand messaging comes across very clear when first interacting with the brand's webpage. It promotes transparency with its consumers and centers around the high quality of their ingredients. It also shows the commitment to sustainability by including farmers and organizations they work with in order to reach their overall philosophical goals. GoMacro also conveys ethical sourcing, family roots, and how their products nourish the planet and bodies of those who consume them (GoMacro, 2023).

Needs Addressed

Table 9: Application of Maslow's Needs Framework to GoMacro Brand

Fundamental Need	Description	How GoMacro Addresses This Need	Not Addressed (X)
Subsistence	Food, water, shelter, etc.	Offer organic, vegan, plant-based energy snack bars.	
Protection	Security, absence of fear	By having certifications and labeling, it conveys a sense of security.	
Affection	Love, emotional bonds	Conveys family roots through branding, encouraging bonding.	
Understanding Participation	Critical thinking, knowledge	Educates consumers of the benefits of consuming their products and the good it does for the environment.	
Idleness/Recreation	Rest, relaxation	N/A	x
Creation	Innovation, creativity	Offers a variety of flavors and products for a wide range of consumers.	
Identity	Sense of belonging, awareness	Emphasizes the positive consequences of purchasing from the brand and their contribution to overall philosophy.	
Freedom	Autonomy, ability to choose	Due to their large variety, consumers have the ability to choose the products that suit them best.	

9.1.3 Case 3: Brand Orgain

Brand Personality

Figure 5: Orgain Logo



Logo

The logo appears to be sleek and modern, giving off a clean and simple look. The color used is green in reference to the environmental and health aspect of the brand. The font used is also reflects the nature aspect the brand surrounds itself with such as the plant-based options. The logo also includes the words “clean” and “nutrition” very clearly emphasizing their goals and what they stand for.

Story

The founder is Andrew Abraham who is an M.D. and a cancer survivor. The webpage states, that he had one goal in mind. This goal was to use good and clean nutrition to help people everywhere (Orgain, 2024). His beliefs revolved around that real nutrition could make an everlasting impact on people’s lives (Orgain, 2024). By making the mission of providing clean nutrition, he developed these energy snack bars that help individual stick to a clean diet (Orgain, 2024).

Values

Their values are also reflected throughout their webpage and brand, and by taking a closer look at their displayed information they value delicious taste, clean nutrition, and high quality ingredients (Orgain, 2024). Not only that, but they go the extra mile to hold their products to high standards to remain “relentlessly clean” (Orgain, 2024).

Product Range

Orgain's product range is vast and caters to many people looking for clean nutrition. Their variety of products includes; powders, collagen, drinks, kids items, energy bars, and

supplements (Orgain, 2024). The variety of this product range encompasses a vast majority of the population in terms of ages ranging from young to old.

Marketing Strategy

Target Audience

The target audience for Orgain is vast and diverse. From catering to kids with juices and vitamin supplements to older individuals with collagen and energy bars, there are not many people who are left out. Of course, their target audience is for those who are looking for clean nutrition, healthy options, and to feel good about what they consume.

Channels

Orgain, similar to other brands, uses social media channels such as facebook, tiktok, and Instagram to reach their target audience of all ages. Digital marketing is not uncommon in the world of channel communication and Orgain has a heavy presence online. They also collaborate with influencers and have partnerships with other health experts in the field.

Brand Messaging

The brand itself communicates a healthy, clean, and wellness product. It uses various tactics such as digital marketing and seals or certifications to convey that they can be trusted. They also use the founders empowering story to reach more individuals and to almost persuade to make a change.

Needs Addressed

Table 10: Application of Mas-Neef's Needs Framework to No Cow Brand

Fundamental Need	Description	How No Cow Addresses This Need	Not Addressed (X)
Subsistence	Food, water, shelter, etc.	Provides a wide range of clean nutrient products.	
Protection	Security, absence of fear	Uses certification and high quality ingredients for safe and clean snacks.	
Affection	Love, emotional bonds	Uses founders story to create an environment for sharing and connection.	
Understanding Participation	Critical thinking, knowledge	Provides detailed information about nutritional facts and product ingredient origins.	
Idleness/Recreation	Rest, relaxation	N/A	X
Creation	Innovation, creativity	Continues to expand product line to cater to a bigger target audience.	
Identity	Sense of belonging, awareness	Connects with consumers who are health-conscious and want to make a change.	
Freedom	Autonomy, ability to choose	Large variety of product to choose from depending on preferences.	

10. Discussion

Over the years both the vegan and snack market have grown, which has prompted companies to adapt their products and come out with new innovative products for consumers. With the health trends, social and cultural movements to accept veganism and alternatives, companies have reacted accordingly. This however is still new territory and to better understand what kinds of tactics are being used to compete within this sector, this paper was created to conduct and analysis.

The analysis conducted was of the three brands that provide vegan energy snack bars, No Cow, GoMacro, and Orgain, provides insight into the marketing strategies used to meet consumer needs. By utilizing Max Neef's framework, it allowed us to see a more detailed and broken-down analysis of different ways fundamental needs were addressed. This analysis highlights the importance of understanding how many of Max Neef's Needs, need to be covered to see a brand be successful towards its' target audience. Due to the growth of both the vegan market and snack market, this is a growing sector, although it still lacks literature and exposure. These findings are overall important because they can be used to apply similar strategies to other brands. While all three brands seem to be doing well and have adapted to almost all aspects of the framework, there is still room to develop.

The overall research for this paper included creating a theoretical foundation with the literature review to understand the vegan, snack, and the vegan snack market. This research allowed to create a better understanding of how these markets have been influenced by factors such as technology, country guidelines, and certain emerging trends. The snacks market is large and complex, this also includes the fact that there is no universally agreed upon definition for the term "snack" as seen in the literature. This complicates things because as the market continues to grow and expand, guidelines across different countries, that are influenced by diverse cultures, tend to differ. Alongside this, the vegan market is also expanding and developing and has become a mainstream topic. This has also raised the question of what defines a vegan. This is another term where the definition varies and depending on country or organization, the focus shifts from environmental, health, or animal welfare as the main concern. All of this to say that the growth of these markets is important due to the increasing demand of more vegan products. These vegan products are not only being consumed by vegans, but by others who follow different lifestyles, diets, and hold a relatively higher moral compass. The topic gets even more complicated when realizing there

is also no set standard for vegan labeling. As show in the literature review, there are many seals that different organizations use, to apply to products. Even though there is a variation, and some are more prominent than others, once again, there is no set guideline for labeling further complicating these products for the public. This goes to answer the first specific objective of trying to understand all the definitions and their flexibility.

What is important to keep in mind, is that with this general understanding of what the markets look like; in order to get a better and more detailed look, Max Neef's Framework was applied to understand all of the needs covered in order to attract consumers and keep them happy. Not only did it examine fundamental needs, but also considered the brands story, their marketing strategy, and brand personalities to come to a more well-rounded conclusion about what resonates with consumers. This allowed for the second specific objective to be answer and to gain that understanding of the brand itself. It is also directly tied with objective number three and seeing how the framework gives an overall analysis of the selected brands to paint a bigger picture.

So what does this mean? Well, according to the analysis, the most relevant finding has to do with where the focus lies for each brand when covering needs. In fact, all three brands promote heavily on engagement and cover the first fundamental need, subsistence, very well because each brand offers variety and therefore includes a larger target audience. The difference in these brands is their focus on how they fulfill fundamental needs of higher importance such as freedom and identity.

This is an interesting observation, as these are the needs that create those long lasting relationships between consumers and brands. By taking a look at GoMacro (table 9) it focuses a lot more on promoting the environmental aspect of their brand, such as the ethical sourcing and sustainability of their products. This means there is now less attention of the other fundamental needs although they are being covered adequately. In contrast, looking over to No Cow, the purpose shifts to more health concerns in relation to dietary inclusivity as can be seen by the origin story of the brand. This shows the top priority the wellness of their consumers and takes away from other fundamental needs.

These comparisons highlight the importance of understanding the values of each brand and how they choose to align those with the consumers priorities. This goes to suggest that brands can be successful by effectively recognizing and addressing a wide range of human needs, then incorporating those into their own products. This can lead to having competitive

advantages in the market because consumers will keep coming back knowing all their needs are covered, one way or another. Other brands or sectors of an industry can take this knowledge and apply to a variety of different products.

Furthermore, it is clear to see that all three brands cover the whole table except for one, the leisure need. The reason this specific need is not present is because these three brands are energy bars, which promote activity and not pleasure or pleasure anywhere in their strategy. This is to be expected, yet it is still surprising that not one brand made any effort to extend to that need through any of their products. This can be something that a brand can develop into another product that they can offer. It doesn't necessarily have to be incorporate into existing products, but turned into a new development so that the brand may then cover all fundamental needs one way or another. Another way it can be taken is other brands or sectors of an industry can take this knowledge and apply it to a variety of different products.

10.1 Limitations of Study

One of the key limitations of this study is the data collection which came from secondary sources, and this may lead to not fully capturing the essence of the brands selected. Furthermore, this analysis was limited to three American brands which may not be representative of vegan energy snack bars globally, therefore creating bias. Lastly, due to the focus on vegan energy bars, it goes as far to limit the generatability of the information because it might not be applicable to other sectors.

10.2 Future Research

Suggestions for future research include expanding and exploring cross-cultural differences in consumer needs. One other suggestion is to expand on different countries for snacks that aren't available in the United States. Lastly, carrying out overall analysis in different western countries to see how it varies, despite having similar cultures.

11. Conclusions

This analysis showed that three different brands, No Cow, NoMacro, and Orgain showed different focuses on fundamental needs and therefore reflected their brand personalities more clearly. This analysis also shows that applying a Framework such as Max Neef's Framework is essential to further understanding the importance of product and value alignment with consumers. Furthermore, as the vegan snack market continues to grow, an analysis such as

this one could have more positive outcomes in understanding how the broader global implications of meeting fundamental needs can help companies and brands excel.

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