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ABSTRACT

Insights from organizational and economic sociology predict the emergence of new product categories is not simply a matter of developing something novel, but also the result of a cultural process making claims about these products. The recent pursuit of sustainable consumption exemplifies one of these processes, linking ethical qualities and claims to create connections between products and the people who consume them. Plant-based meat, as an emerging market contextualized by the ideas of ethical consumption surrounding the broader plant-based food movement, provides a unique opportunity to explore how lifestyle movements and novel ideas result in the creation of new product categories. Drawing on ethnographic observations and interviews with plant-based meat producers and restaurants that serve these products, this project explores the emergence of plant-based meat as a set of products and as a market. I find that there is variation in how plant-based meat producers position their products based on the extent to which they connect their products to broader social movements. Despite these differences in production, restaurants understand these different products as belonging to the larger plant-based meat category and present them not on the ethical basis of producers but by using different standards of judgment based on how the restaurants position themselves to their consumers. Together, producers and restaurants engage in an interactive process to generate and integrate new products in the act of mainstreaming plant-based meat beyond an ethical project.

INTRODUCTION

Plant-based meat, understood as products that try to emulate the taste and experience of meat, are a new plant-based food product category that provide a vegan alternative to meat without removing the idea of meat itself. Producers of these products align themselves with values associated with plant-based eating, such as minimizing environmental impact and improving consumer health, but been shown to market to a different set of consumers (Piper 2020). The oxymoron of plant-based meat in itself combined with the contradictions it has with its cultural context, inspire questions about the goals and potential of the plant-based meat market.

How was the plant-based meat product category created? How have actors within the plant-based meat market made sense of these products within the context of ethical consumption and broader plant-based food movements? And more broadly, how do products with different backgrounds position unify themselves to form a cohesive product category?

Work in economic and organizational sociology suggests that new products are created as a result of innovative ideas and unique cultural contexts (Jensen 2010). Further, the sociology of consumerism describes the phenomenon of ethical consumption where consumers navigate consumption with ethical considerations in mind (Lewis & Potter 2011). In thinking about plant-based meat products, we can imagine one component of the 'unique cultural context' to be growth in the ethical consumption movement. These two sub-fields, while separately providing ideas to understand how new products are generated and how people consume them, have yet to establish how ethical consumption itself can create new markets. Plant-based meat, as an emerging market contextualized by the ethics surrounding the broader plant-based food

movement, provides a unique opportunity to explore how culture and social structures result in a new marketplace.

This study engages with the plant-based meat market in a single, urban United States city. I utilize ethnographic observations with a local plant-based meat producer and interview data with restaurants that serve plant-based meat products to investigate how these actors understand and construct meanings in the market. I find that there is variation in where plant-based meat producers position their products based on the extent to which they connect their products to broader social movements. Despite these differences in production, restaurants understand these different products as belonging to the larger plant-based meat category and compare them not on the ethical basis of producers, but by using different standards of judgment based on how the restaurants position themselves. In looking at plant-based meat's emergence as a new product category in the context of ethical consumption, I deepen theory on product formation, while also highlighting practical applications for the plant-based meat market in the context of the current United States market and food system.

LITERATURE REVIEW

Plant-based meat is an emerging market with associations to ethical projects. Therefore, to understand the case of plant-based meat, I build on a combination of existing economic and cultural sociological theoretical frameworks that together explore how ethical consumption creates a context for new markets to emerge.

Ethical consumption

Factors that have motivated the plant-based meat market largely encapsulate 'ethical'

values on the basis of the idea that consumers want to feel better about what they are buying. This phenomenon is not unique to plant-based meat and has recently gained traction as a catch-all-phrase for the shift toward consumption as a 'site of responsibility' (Lewis & Potter 2011). Ethical consumption is officially defined as the practice of purchasing products and services perceived to be produced in a way that minimize social and/or environmental damage (Lewis & Potter 2011). Plant-based meat makes several specific ethical claims including animal welfare, climate change prevention, and general human wellbeing that allow it to fall under this broad ethical umbrella. This previous work and critiques of the ethical consumption movement frame the way new ethical product markets, like as plant-based meat can be understood.

Central to understanding why ethical consumption has grown as a consumer movement is the idea of status, which is both created and motivated by the practice of ethical consumption. Bourdieu's ideas on taste and distinction illustrate a social perspective on this idea. Bourdieu describes taste as a series of habits that develop through experiences in a unique social context. These tastes when applied to new contexts enable members of classes to distinguish themselves and demonstrate status (Bourdieu 1984). Distinction applied means that goods deemed ethically correct to consume are both defined and restricted by economic and culturally defined class barriers (Littler 2009, Bourdieu 1984). Scholars Lewis & Potter, in their critique of ethical consumption, argue that it is these structural inequities and disharmony surrounding cultural values that prevent consumption from being a 'one size fits all model' for consumers (2011).

Ethical Food

Because of foods' clear and unavoidable involvement in everyday life, it is an essential component to understanding taste and the ethical consumption movement more generally

(Gheihman 2021). Recent work has additionally established that high-status consumers increasingly factor ethical concerns into traditionally aesthetically motivated food choices (Johnston et al. 2011, Kennedy et al. 2018). While the significance of food as a ground for ethics has been considered broadly, there has been less focus on the role of actors in constructing ethical foods specifically. This work suggests that restaurants in particular, as social eating grounds, could be an ideal location for these tastes to be melded and displayed.

Recently, ethical consumption has been used to study plant-based eating specifically. The vegan movement's historically consistent ethical preoccupation across distinct cultural threads of "healthism, environmentalism, and speciesism" exemplify its involvement in ethical consumption (Gheihman 2021). Given these core values, Gheihman establishes veganism firmly in the realm of ethical consumption and classifies it as a 'lifestyle movement'.

The United States provides a unique cultural context to understand veganism within. Previous research on United States food systems has emphasized the prominence of meat in United States society noting meat-centric narratives in media and the idea of 'meat-as-essential' (Luck et. al 2007). Other work has investigated the ways meat has gained status and meaning through United States specific cultural contexts such as "religious, gender, communal, racial, national, and class identity" (Chiles & Fitzgerald 2018). Understanding the specific role of meat in the United States cultural setting raises questions about the role of new meat-emulating vegetarian options.

In undertaking this project though, it is important to acknowledge that plant-based eating has been practiced for a variety of reasons historically and globally. In the United States, the eastern religious traditions like Jainism, Hinduism, and Buddhism have some hold on plant-based culture (Spencer 1995). Veganism in the west though has spread further through "a

complex process of cultural diffusion including colonial cooptation" (Gheihman 2018, Stuart 2012). It is only more recently that plant-based diets have gained distinguished status. Spencer describes how meat has traditionally conferred higher status due to its relative high price point (Spencer 1995). Despite this history and its ability to be affordable, "today veganism is often portrayed in the media as a white and wealthy phenomenon" (Greenebaum 2016, Gheihman 2021). While this work is helpful in placing plant-based meat into the ethical consumption movement, the assertions and critiques the lifestyle movement argument makes neglects the point that ethical is broad and multifaceted. Literature on ethical consumption has overwhelmingly critiqued the broadness of the ethical consumption category which allows appeals to many, sometimes contradictory, projects to fall under the ethical domain (Lewis & Potter 2011). Particularly because meat consumption is presented in direct conflict to several ethical principles, an analysis of the multi-dimensional aspect of ethics in the plant-based meat market is warranted.

Social Consumption

Much of the ethical consumption literature is focused on the consumer side ethical markets. Well-established in the economic sociology literature though is the role of social cues in consumption patterns (Wherry 2013). Social networks and the shared meanings that develop within networks have the ability to reinforce commitment for a specific product and even create 'brand communities' that intentionally protect the integrity of certain product types. Producers and intermediary actors such as restaurants, involved in constructing product identity, have been shown to play an important role in developing meanings and symbols that make a product or

service appealing for various demographic groups. These meanings can then work to generate and maintain market demand (Wherry 2013).

Scholars have suggested how the creation of the 'ethically motivated consumer' has been an intentional project. Barnett et al., in their work on the relationship between consumerism and activism, suggest that the consumer has increasingly been reflected in media as a 'privatized and informed individual', pressuring individualism and conformity to that identity (Barnett et al. 2005, Lewis & Potter 2011). This effort individualizes and moves politico-cultural change to the home, diverting efforts to activities like consumption (Lewis & Potter 2011). While political actors and the media have been shown to effect consumer choices, producers themselves have not been studied.

Producers are inevitably reactive to these shifts in consumer preferences towards ethical considerations, but also may have a role in shaping these movements. Scholars have noted the recent turn towards social-welfare oriented businesses in an attempt to make consumption a more communal act. To describe this phenomenon, the term 'caring capitalism' has emerged in the literature and highlights the new turn towards corporations specifically to provide social goods (Barman 2016). Similar to on the consumer side, it has been acknowledged that establishing an all-encompassing term like 'social goods' is flawed because of the multitude of social projects appealing to different orders of worth that exist under the caring capitalism framework (Barman 2016, Boltanski & Thevenot 2006).

To explain the disjuncture between multiple orders of worth and the more general phenomena of caring capitalism, Barman argues that the different ways social impact is measured depends on the communicative purpose of the social project and the firm's own professional expertise (Barman 2016). Different ethical appeals are justified depending on these

two factors. While the multitude of social projects existing has been acknowledged though, there has been little work done on how differing social projects influence the establishment of a product's legitimacy.

Establishing Legitimacy

Previous research has shown that a product must be considered legitimate to be considered at all for consumption in market (Zuckerman 1999). This idea is based on the idea that consumers make consumption decisions in two stages. Consumers first examine the category as a whole by eliminating products that do not meet the minimum criteria for acceptability. Second consumers will look within this set and choose the best product, or product that stands out the most (Payne 1976, Urban et al. 1996). The important takeaway from this process is that a product must first be considered legitimate within a market to be considered an option at all. Zuckerman in his work in financial markets elaborates on this to show that products spanning multiple product categories can risk legitimacy (1999).

Research on product categories has shown that when some market categories emerge, they are viewed as illegitimate both due to the inherent newness in the market realm, or to the unique addition they contribute (Jenson 2010). Jenson describes this illegitimate identity specifically as violating "important social norms and values" (Jenson 2010, Scott 1995). The oxymoron of plant-based meat, alongside the deeply rooted existence and cultural significances of animal-meat, make plant-based meat an illegitimate product by definition. Actions such as pushback from non-vegans and stakeholders in meat markets through legislation to restrict how these products are labeled illustrate the ways in which plant-based meat continues to come into conflict with established norms in the context of food culture (Silverman 2021).

Legitimacy of new products is developed through the interplay between internal category actors, such as producers and their active marketing and distribution efforts, and 'interested audiences' as they judge the "feasibility, credibility, and appropriateness" of the product (Navis & Glynn 2010). As internal and external actors learn to interact within the market category, creating a coherent image of the other's tastes and behaviors, the market category will become legitimate. The literature shows that once though a category is able to achieve legitimacy, the focus on this market category shifts from its identity as a whole, to the differentiation within it (Navis & Glynn 2010). Further, as market categories mature and become legitimized, they become more difficult to change by various market actors.

Market Categories

Can plant-based based meat be considered a new market? What defines what market boundaries are? Work from organizational sociology defines market categories using two straightforward characteristics: having members who are linked to a common type of product by a set of "rules or boundaries" and having an identity that reflect the member's commonalities (Navis & Glynn 2010). In the plant-based meat market, these members could include producers and restaurants who all commit to the rules of a product that is vegan but that try to emulate the meat experience and share the identity of being a 'meat substitute' While scholars disagree on the precise nature of how products in a category relate, for example as substitutes or as points along an array of ordered quality, they agree that market categories are established when these products together create a joint identity that others recognize (Navis & Glynn 2010). These market categories are then recognized and communicated between producers and 'interested audiences' which include secondary actors and consumers (Rosa et. al 1999, Navis & Glynn 2010).

The Formation of Market Categories

The important role of both internal and external factors in the development of a new category is well-established in the literature. Internal factors are understood as the 'entrepreneurial ventures' or innovation behind ideas that motivate the category (Jenson 2010). Currently this component of market development is viewed as the actual ideas that drive the category; in other words, the novel advancements that allow new products and markets to tangibly exist. External factors, also called 'interested audiences', include the cultural context the product is being developed in (Navis & Glynn 2010). These can include social movements motivating consumption or factors that are defining taste in the social environment.

Also emphasized in this discussion is the role of powerful producers in shaping the existing or new structures of categories. While market level changes can occur as technical features develop, markets are political in that category structures can remain durable with powerful producer involvement. Eventually, once a large producer becomes well-established in a market, they may become a part of how a product is defined and structured acting as a standard of comparison (Navis & Glynn 2010). Plant-based meat's position as a relatively new and unestablished market approaching legitimacy and influenced by a multitude of ethical projects makes it an ideal empirical case to understand how markets are established in the context of the ethical broader ethical consumption movement.

METHODS

This study adopts a multi-method approach combining qualitative interview and ethnographic data from actors involved in plant-based meat product development and

distribution combined with analysis of marketing materials and other publicly available data released by plant-based meat suppliers. Three producers in particular are focused on: Impossible Foods (I), Beyond Meat (B), and Bloodless Meatery (M).

Ethnographic data used comes from a collection of observations conducted at a vegan plant-based meat shop, Bloodless Meatery. Site visits were done three times a week for four-hour blocks during shop hours, spread over the course of eight weeks. Field notes provide information from three distinct settings, including the front-of-house customer area, back-of-house kitchen, and from conversations with the online content office. These observations provide insight into how staff and customers understand the products the shop produces and sells, and also the business itself more generally, a self-identifying butcher shop that is unique in the plant-based industry.

To gain insight on how plant-based meat is understood and portrayed to consumers, I used interview data from conversations with six local restaurants featuring plant-based meat products on their menu. Restaurants selected included those both with solely plant-based menus, and those that also sold animal-meat products. I selected some restaurants after I began the ethnographic portion of the research through a snowball sampling approach after learning that they featured products from the plant-based meat producer being observed. Interviews were conducted in-person in all cases but one and were semi-structured lasting between 20-30 minutes. Interviews were with the owner of the restaurant in all cases excluding one with the head chef. Interviewees shared information related to how they use plant-based meat products and what these products mean in the context of their menu and goals.

Lastly, publicly sourced materials including company annual reports, restaurant and producer social media pages, and advertisements were analyzed to understand the cultural

context around the product and who is being targeted. Social media also provides the opportunity to see how consumers react to and view plant-based meat products, show the sub-communities businesses are associating with, and observe interactions in the digital market. Qualitative data was analyzed by sorting for themes within and across field notes, interview transcripts, and sources.

FINDINGS

 I separate my findings into a producer and a restaurant section to illustrate the different yet interacting ways these actors understand the plant-based meat category. Within these two sections I first show how the category is established and unified by each actor, and then into how products are distinguished within each category.

Producers

 Establishing the Category

 Plant-based meat, even more intentionally than other new, emerging products, is framed as a solution to a problem. The specific problem plant-meat seeks to solve is two-pronged. First, there is an echoing call for less meat consumption for a variety of ethical reasons. Second, in direct contrast with this, is the idea that many people enjoy eating meat. By participating in the plant-based meat category, all plant-based meat producers seek to answer this fundamental call.

 All plant-based meat producers studied in this project embrace and market this overarching idea of ethics and activism achieved through the consumption of their products. After establishing a call-for action against climate change and the inhumane treatment of animals

in their mission statement, Bloodless Meatery explains how through their food, and by consuming their products, "together we can all change the world one meal at a time!".

Beyond Meat shares a strikingly similar sentiment on their website, illustrating the belief that "the positive choices we make every day – no matter how small – can have a great impact on our world." Upon entering Beyond Meat's website, visitors are additionally prompted with an option to sign up for their email list and 'join the movement', further emphasizing that consuming these plant-based meat products is more than simply another consumption choice but rather participation in a larger ethical project.

Put alongside these two producers, Impossible Meat does not say anything unique in their mission statement. On their main page they proudly state: "With Impossible Burger, it's never been more delicious to save the planet." Impossible Meat with this statement implies that by simply eating an Impossible Burger, one can make a positive difference and contribution to the climate crisis.

All of these sentiments regarding that an individual will feel better and *is better* by purchasing these products, root plant-based meat in the broader ethical consumption movement. From its formation, the plant-based category has been a reaction to a set of needs. This primary motivation still exists and has allowed a blanket understanding of how plant-based meat exists to, what it is, and what it seeks to accomplish to emerge.

Differences Within the Category

Despite this overall broad unity in the thinking about the plant-based category, there are several significant distinctions between plant-based meat producers and their products. These differences range from the size of the producer to the protein sources used and the level of

production technology. Yet, the differences are not overly emphasized as individual differences in each product. I instead find that overall differences within the plant-based meat category stem from differences in associations to specific ethical movements producers identify with.

In this analysis I identify four movements all related to the ethical consumption broadly, that are reflected in some way by these producers. These movements include anti-large corporate enterprise, human health, animal rights (and alignment to the original vegan movement), and climate change. Overall, all the producers looked at emphasized the idea of climate change in similar ways, so this movement distinguished producers less from one another. The extent to which producers identify with these other individual movements determine specific qualities of their products and explains why there is so much variation between producers.

A Local Small-Business

Previous scholastic work has shown that specialty markets have emerged more recently in reaction to larger corporate mass production. Anti-corporation sentiment in America portrays larger corporations as disconnected, selfish, and as only serving their shareholders (Barman 2016). In contrast, the small-businesses are portrayed to be community-serving and more ethical. Recently this sentiment has manifested in specialty, artisanal markets. These markets are distinguished and shown to appeal to higher status consumers thus linking themselves to the ideas of ethical consumption (Ocejo 2017). Bloodless Meatery appeals to this artisanal business model.

Bloodless Meatery's projected image as a small, artisanal business is present directly in their marketing materials. On their website they describe their product model as 'small-batch' made from 'scratch' and emphasize their trajectory to business from starting at a farmers'

market. These tropes are furthered in casual language like 'organically' to describe how the business started.

The way the shop is set up and food is sold is also in line with this model. The shop is a mix of white tiles and hard wood and is set up with a glass case that models that of a butchershop. This butchershop image is apparent to customers who are not even familiar with the shop and is emphasized by the small selection and the nature of locality emphasized by employees.

Human Health

While Bloodless Meatery embraces this idea of 'small-batch' production and more traditional plant-protein production methods, it seems that the extensive technological resources inherent to the innovation of more scientific products can only be done on a larger corporate level. Along this line, simultaneous to the rise in specialty markets, is the obvious continuous innovations in food production and technology. This further contrasts with the idea of small-business, and also highlights the theme of human health present in these discussions. Impossible Foods and Beyond Meat both embrace this concept of innovation, but to varying degrees depending on their stance on this argument of 'naturality'.

Impossible Meat specifically embraces the idea of technology and science in describing what makes their products unique. This is displayed on Impossible Meat's blog page's extensive 'science' section. This section features articles primarily focused on Impossible's innovation and scientific recipe development process. In a recent blog post categorized under this science category, Impossible Meat has an article titled 'How GMOs Can Save Civilization and Probably Already Have'.

This finding is interesting because in contrast, Beyond Meat on their website explicitly states that they "combine expert innovation with simple, non-GMO ingredients to deliver the meaty experience you crave without the compromise". This appeal to non-artificiality combined with scientific innovation, shows its position in the middle of Bloodless Meatery and Impossible Meat. The appeals of these two producers illustrate that distinction between products occurs at the level of values, not on the level of actual product qualities.

Veganism

Looking first at how producers self-identify, it is very clear to what extent each business positions themselves with the vegan movement. Bloodless Meatery self-identifies as a vegan shop in many ways including how they directly identify their products, through their mission statement, and through their direct support for animal sanctuaries. Beyond Meat similarly identifies their products as vegan it is not emphasized as much in their mission statement. Impossible Foods on the other hand makes no reference to veganism and instead refers to all of their products only as 'plant-based'. The company's mission statement makes no reference to animal rights in describing what motivates their product.

Past these producer's commitments though, the products themselves reveal these values. A recognizable aspect of Impossible Meat's burger products is the fact that they 'bleed' and have raw-meat qualities to them. When a consumer eats an Impossible Burger the fact that they are supposed to be eating animal-meat is made very clear by this experience. While this meat is still entirely plant-based, the experience of eating this bleeding meat could be understood as an act that connects to animal cruelty and suffering.

A primary difference in the products from Bloodless Meatery and Impossible and Beyond Meat are the form through which these products are sold. Plant-based meat products at the butchershop are sold in their final edible form. This is different than Impossible and Beyond Meat in which the cooking and recipe development process is imposed onto the products, just as animal meat is. By putting forward a complete product, Bloodless Meatery avoids the idea that traditionally meat comes from the animal's raw meat. The fact that these products are final form distances them from the physical animal-meat while still embracing the experience of it, and again importantly supports the philosophy of 'no suffering' central to veganism.

In the last stage of the producer process is where these products are sold. Emphasized throughout Beyond Meat's annual report to investors is the fact that they have "secure placement in the meat case for [their] products…where meat-loving consumers are accustomed to shopping for center-of-plate proteins". Impossible Meat similarly places their products in these animal-meat dominated cases, providing a direct substitute for consumers.

Bloodless Meatery describes their products as tasting like "no other vegan product on the market". While this producer is perhaps assuming that this vegan product might appeal to consumers who previously have not liked the taste of vegan products, this statement still places Bloodless Meatery's products in a different physical place, and consumer space than Beyond and Impossible Meats.

The solution to the problem proposed is to individually address different consumer markets. It is obvious that even though all of these products are considered plant-based meat, different producers within the plant-based meat market intentionally appeal to different consumers. Unlike in other emerging product markets previously studied, the plant-based meat

market is unique in that it has been differentiated from the beginning due to the various specific movements it was motivated by.

Restaurants

Restaurants are both active actors in the construction of plant-based meat consumer perceptions and receptive to the ways that producers market their products. Due to this dual-identity, there are similarities and differences to the ways plant-based meat manifests in the restaurant space compared to with producers.

Why Adopt Plant-Based Meat?

Restaurants began including plant-based meat on their menus as consumer demand for plant-based products generally increased. We see restaurants, and their associated consumers, driven by the same problem plant-based meat producers had: the call for less-meat consumption and the need for alternatives.

One burger restaurant which adopted Impossible Meat, states this motivation to include plant-based meat on their menu directly:

> As we were following the trends in 2016 and 2017 obviously plant-based became a bigger idea and more people were enjoying them and were wanting them. … So we really were identifying a trend in knowing that yes, people still do want burgers and sandwiches but also there is a growing population of people, such as myself, that want vegan food as well. (Rest. #1, omniv., I).

This restaurant describes how they began including Impossible Meat because their consumers wanted it. By making this change, this restaurant also shows that this drive for plant-based products was large enough for them to make somewhat of a drastic change and modify their traditional hamburger, beef-meat model. This restaurant owner's own identity as a person who likes burgers, but now also wants 'vegan food as well' also highlights some of the demographics the plant-based meat market began to attract. The owner exemplifies how this broader change in cultural context enabled plant-based meat to gain traction among a broader group of consumers.

Quality and Innovation

While restaurants reacted directly to consumer demand though, we also see that producers themselves motivated this increase in demand by innovating higher-quality products than had previously existed on the market. In this section I show that plant-based meat quality is defined solely on its relationship to meat. This relationship is one that comes from the product identity developed initially by plant-based meat producers.

One restaurant owner highlights how amazed they are by Impossible Meat by describing how Impossible Meat tastes 'just like' the animal-meat alternative.

> Now that vegan is at the forefront, my brother can go anywhere and eat a burger and it's vegan but it tastes just like it… the Impossible and Beyond Meat are so similar sometimes people are like, "I know this is a burger" and we're like "look I promise you this is the Impossible Burger". I swear I'll make them another one but it just tastes just like it. Which is cool. Like we didn't have those products 10-15 years ago. (Rest. #1, omniv., I)

This same restaurant owner when asked to explain the differences between animal-meat and plant-based meat attributes this product's quality as an improvement in the scientific technology behind Impossible Meat.

> The only feedback I've really heard from meat eaters when they eat Impossible Meat is they think it's a little grainy or minerally. Which it is a little bit more, because in order to bind the meat and in order to make it taste and hold together like a burger, they do use like strains of wheat. It's still gluten-free but they use like different strains of things in order to hold it together because a vegan burger does not hold together like meat. It just doesn't have the scientific chemicals in it to hold it together. (Rest. #1, omniv., I)

In this quote, the restaurant owner discusses some of the drawbacks of Impossible Meat's imitation technology, but in doing so, places value and priority on the Impossible Burger's ability to substitute for the real meat. To this restaurant, the unique thing that allowed plant-based meat to gain traction right now was the technological innovation that improved the product.

This idea of innovation underlying improvement is not only seen technologically though. Several restaurants interviewed specifically discussed Morning Star, which is another plant-based meat company that has existed since 1974. In their discussions of Morning Star products, they illustrated that while they were aware of them, this product did not take in the way other plant-based meat products did. Comparing more relevant, current plant-based meat products illuminates the other types of innovations that drove the emergence of plant-based meat in the restaurant industry. One restaurant owner, when asked about why they started including plant-based meat on their menu when they did, specifically drew a comparison to Morning Star to discuss quality.

And truthfully the products such as Impossible and Beyond were not really products
either. There was Morning Star and some other ones but Impossible and Beyond really
kind of upp-ed the game. (Rest. #1, omniv., I)

Another restaurant serving products from Bloodless Meatery, used Morning Star as a comparison
again and described how current plant-based meat options are now of a new 'restaurant' quality.
This restaurant could now use plant-based meat products in a way that elevated the culinary
experiences of consumers who want plant-based meals.

People really enjoy it and really are thankful to the fact that I am creating vegan options
and that they have a place where they can get that. So they're not just eating like Morning
Star fake burgers at home. They enjoy being able to have a favorite sandwich or having
options as opposed to just going to a restaurant and their option is like steamed
vegetables and white rice. (Rest. #5, omniv., M)

The comparison of Morning Star to Beyond Meat, Impossible Meat, and products from
Bloodless Meatery is an interesting comparison particularly because it exemplifies the fact that
Morning Star did not prompt the plant-based meat market to take hold. We can look at several
differences at why Morning Star didn't spark the emergence of the plant-based meat category
from the changing cultural context, to the fact that current products have been improved so that
they might just taste better, or to who the product was marketed to.

How one of these original plant-based meats was reimagined and improved is shown in a
statement describing the differences between Impossible and Beyond Meat. Even though this

comparison is not to Morning Star, it exemplifies some of the problems Morning Star might have had.

> The more important reason we chose Impossible, and this has also changed over time, is when Beyond first came into the market, they only offered patties. And Impossible actually came in five-pound big brown bags. And one of our things as a burger joint is that we don't buy frozen patties, we buy certified angus beef that we ball ourselves and add flavors to in order to make it a great burger. So really the Impossible meat itself represented our brand better because we could ball it to what we wanted it to be for the size and we could add flavors to it and what not. (Rest. #1, omniv., I)

This quote exemplifies how innovation is not limited to technological advance but can also take the form of reimagination. Producers like Impossible Foods were able to imagine plant-based meat in a way that was more engaging and flexible for restaurants. This idea exemplifies the important role of secondary actors in this process. Thinking again about Morning Star, because it only came as complete products, was not a product that restaurant owners could make their own and incorporate into their menus. Impossible Foods, by making their beef product available for restaurants to use as an ingredient, as animal meat is, transformed how plant-based meat could be viewed. Lastly, this idea of quality can be seen as relating to the idea of innovation discussed in the literature. These examples show how we can expand innovation to think about technology, extending boundaries, and reimagining the ways products are presented to secondary actors and consumers.

The Need for a Substitute

One difference between restaurants and producers in addressing the plant-based meat motivating problem is that restaurants act as the participants who do include meat on their menus

and need to be convinced. Restaurants that were presented with a demand for plant-based products but that had meat on their menus, exemplify perfectly the problem motivating the creation of plant-based meat.

One pizza restaurant describes the 'need' for a substitute that addressed the specific topping needs they had. Utilizing plant-based meat products, this restaurant was able to completely replicate their pizzas that included meat with a vegan option.

> Yeah, so we needed to substitute things that we already had on our pizzas like pepperoni, sausage, and chicken. Like we have those on all of our main pizzas, so we wanted to specifically focus on those and bring those in. So, we have vegan pepperoni, vegan sausage, vegan hamburger, and vegan capicola to substitute for Canadian bacon. (Rest. #4, omniv., M).

Within the context of broader plant-based demand, this pizza restaurant wanted a way to accommodate consumers without changing the themes and options on the menu. Using plant-based meats enabled the restaurant to maintain the same type of products.

Another chef at a restaurant serving products from Bloodless Meatery described how he uses plant-based meat products in a way that 'reinterprets' menu items that fit into the restaurant's general visions.

> We use [the plant-based meat] where it still follows along with the ethos of the restaurant. But doing it with a vegan approach. As a chef, you can take an idea or a classical dish as we've done during vegan week, and try and reinterpret that with the products available or just go completely from scratch, while still try to produce a classic dish but without the fats or the meat. (Rest. #5, omniv., M).

These restaurants found ways to incorporate plant-based meat in a way that made sense on their menus. For the restaurants highlighted, this was only made possible with the creation of a product that intentionally and closely imitated meat products. Even if the product wasn't necessarily the closest substitute, by labeling it as plant-based meat, this product was able to act in place of a meat product. Further, the ways these meat-serving restaurants use plant-based meat exemplifies how plant-based meat producers have been broadly successful in driving plant-based eating despite the continuous desire for meat products.

Restaurants and producers work together to develop the plant-based meat category in a cyclical way. While producers helped motivate consumer demand, restaurant involvement in making these products better and into more legitimate food items helped these products be seen as a complete category, something Morning Star was not able to previously achieve on its own.

Making Sense of Plant-Based Meat

Once a restaurant decides to incorporate plant-based meat on their menu, they seek to understand how to use the product and which products to choose. Plant-based meat is understood relationally both within the category to products made by other producers, and to the broader plant-based category itself, reinforcing the idea of one overarching product.

As exemplified in the producer section, there are several fundamental variations among plant-based meat products. Similar to how producers differentiated their products in accordance to different movements, restaurants choose products based on these same distinctions. Variation is determined again overall by specific movements and values that each restaurant identifies with or what their consumer base identifies with.

One self-identifying 'plant-based' restaurant discussed their reasons for not choosing Impossible Meat sharing why this product did not align with the values of their restaurant.

> Impossible will never be kosher just because of the way it's made. They'll just never be able to meet kosher certification standards. And, well, think what you may of kosher eating, whether you have that belief system of not...kosher certification really is a certification of cleanliness. I think that was the original intention. And that kind of says something about Impossible…hahah. It's kind of the in the middle between...yeah like it's just one of those Frankenstein foods. (Rest. #6, veg., B)

This first restaurant emphasizes the themes of 'health' and 'natural eating'. To them, it is more important to have a healthier, 'cleaner', less corporate and scientific product than something that is may come across as a more realistic animal-meat. The restaurant's identity as a solely plant-based restaurant exemplifies that these strong sentiments towards Impossible Meat may exist because their consumer base does not necessarily want a strong substitute.

A similar idea is shared by another restaurant that serves Beyond Meat.

> We started with different patties like Impossible too. But for me as a chef it didn't make sense to bring a patty that looks like meat and tastes like meat… the people didn't like it. It was too much because it's red and there's blood in there. And the people were like no I will not eat it this, because I am vegetarian and I am vegan. And we discovered the Beyond. Like okay, different flavor and different texture and everything. (Rest. #2, omniv., B)

This restaurant appeals to the idea of their consumer base, choosing their products based on the existing vegetarian population, who presumably has distanced themselves from the idea of meat

already. Appealing to ideas from the vegan movement, this restaurant owner chose products that

aligned with his customer bases' values.

Other restaurants chose to appeal to the small-business model of Bloodless Meatery.

Emphasizing the importance of locality in their decision to have Bloodless Meatery supply their

products, this restaurant illustrates their anti-corporate sentiment.

> Local. So as a northeast business out of the products available, they're the best because
> fake meats and fake cheeses, all the stuff that we've tried coming from...because none of
> us are actually vegan… those we felt just represented the real thing the best. Yeah. And it
> was just the best option. They're fun, they're great people, we support them like we're
> always trying to feature stuff using their products even when we're not doing vegan
> week, and it's not a corporate entity either. (Rest. #5, omniv., M)

As this restaurant unpacked this idea, they pointed to other qualities of small-business including

personal qualities 'fun' and 'great people' illuminated by the personal relationships that exist

between the two businesses. Restaurants base their decisions on ethical priorities and then use

their understandings of these products to incorporate them into their restaurant model and menu.

These broad understandings created by producers on the basis of ethics allow create a foundation

of meaning that restaurants can build on.

DISCUSSION AND CONCLUSION

This research works to develop a comprehensive picture of how restaurant-producer

interaction has influenced the development of the plant-based meat market. In doing so though, I

illuminate the many differences between products, and immense heterogeneity within the plant-

based meat category. The fundamental puzzle of plant-based meat is then how the product

category is able to maintain a cohesive product identity despite the variety in claims and understandings actors make about various products.

To summarize my findings, I first show how plant-based meat is unified and differentiated along ethical lines. This framework is what both producer and restaurants act within and allows for an interactive relationship between restaurants and producers to emerge. Producers present a desirable product for consumers, consumers demand this product from restaurants, restaurants choose products that align with their consumer's preferences, and further develop this product in the context of their menus to redefine what plant-based meat means. Allowing restaurants to choose and make sense of these products is as important as the product put out by producers and allows for different understandings of use for the product to emerge.

The foundation of both specific ethical movements and the broader idea of ethics itself have actively motivated, and continually work, to define the plant-based meat category. This idea is seen in three main ways. First, producers frame products to fit new consumer values in alignment with specific social movements. Secondly, producers are indirectly motivated by this ethical problem to innovate and create solutions for these ethical consumption in ways unique to innovations done in any previous cultural and social contexts. Lastly, restaurants who have been motivated to include plant-based meat by an ethical call from their consumers, identify and choose products from producers that fit both their client's needs and the needs for their restaurant.

Restaurants understand the associations to these ethical movements and exemplify the importance of these associations though their intentional choice of products. As restaurants work with the plant-based meat products they've selected, they provide these products a new venue to further grow and establish their individual and collective product identities. This role is

important because it establishes restaurants as active 'tastemaker' participants in this market that help products establish legitimacy. Plant-based meat producers to this end intentionally develop products so that restaurants can fit them into their menus and solidify and unify their product's identity.

My overall findings reinforce the larger concept in the literature that market categories are developed though innovation and interested audiences. This work though bridges the existing ethical consumption and economic sociological literature by contributing three insights.

First, my research contributes insight into how values and status manifest when there are competing ethical projects in a category. The findings show that products from different plant-based meat producers are still seen as a unified market. Unlike other unified product categories that have clear orders of quality within the category though, plant-based meat is organized based on value designations that are assigned based on sub-product's identification to ethical projects. This idea can be seen in how restaurants choose which products to include on their menu. Considering them all under the plant-based meat category, they make their decisions about which products to use not by comparing them by quality directly but instead on their own restaurant's values. Producers in their self-identification of products similarly compared themselves to competitors on the basis of ethics and movements they were connected to. This framework provides a way to understand products in a category that on first glance appear incohesive.

Second, through examining the work of restaurants alongside producers, this research emphasizes the role of intermediaries in creating newly emergent product categories. I show that restaurant actors, through their immediate connection to consumers and role in transforming ingredients, are not only receptive to information from producers but also influence what producers put out and meld product messaging to directly influence the plant-based meat product

identity. For example, the desire for plant-based meat to act more as an ingredient than a finished product motivated and dispersed the Impossible Meat brand and ethical product through hamburger restaurants. Beyond simply bringing exposure to products on menus, restaurants were involved in showing consumers how these products should be used and eaten, modeling a product that acted more like a meat-substitute and unifying the category. The powerful role of these actors in their efforts to demonstrate product features deserves more attention in the literature and carries implications on how firms can more effectively advertise and disperse product information.

Lastly, this work outlines the process of how a product moves towards legitimacy. I argue that that process of legitimacy develops through the intersection of various appeals to value and the work of intentional actors involved. I present the example of Morning Star to show a product that did not reach fully legitimize arguing Morning Star did not establish the plant-based meat category due to its weak ethical appeals and ineffective marketing towards restaurant industry participants. The need for a specific ethical agenda and actors that understand and show the public how products can be understood, is an underexplored part of the process in establishing legitimacy. This framework holds potential implications for companies and policymakers in efforts to create traction and success for new products and ideas.

Overall, this project begins research on the increasingly relevant and growing new plant-based meat industry. There are implications for these results. A thread running through my findings is the importance of broadening the concept of innovation. This work shows that recognizing and embracing innovation may be part of a process that opens up many new product opportunities to solve a variety of problems. Meat-based eating has begun to be questioned more broadly and the ways the plant-based meat category has had success in catering to new groups of

consumers shows that re-labeling perhaps 'science project'-y or traditionally eaten products like seitan can traction in our current cultural context. As we think about replacing less-sustainably produced food products or addressing needs like food security moving into the future, marketing even more radical products like lab-meat seems doable. These unique implications serve to motivate future research on this topic.

Plant-based meat is in many ways a unique and niche market but, its qualities do resemble other emerging appeals to social agendas. The findings from this research on product differentiation and the roles of actors in constructing legitimate markets motivate future research in the realms of category formation and social movements. In a moment increasingly attracted to the profitization of social movements, this research begins to suggest reasons these might succeed or fail. Future work investigating other growing trends and movements should be done to understand the viability of long-term impact of the 'ethical' model. Additionally, this work brings attention to the different audiences reached when there are differences in ethical appeals. Future research should investigate whether this differentiation can complexify the role of status in critiques of ethical consumption and investigate whether this impacts who is excluded from these current movements. Looking beyond plant-based markets, the ideas this research presents on the existence of product differentiation in emerging markets in addition to developed markets should be tested for different, less segmented markets. Lastly, because plant-based meat currently holds novelty as an 'ethical product', whether restaurants integrate other products in the way this paper suggests is an important potential area for future research.

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