GYANBODH
ISSN:3048-9792
Volume: 2
Issue: 3
May-June:2025

To Study the Demand of Frozen Foods in Foreign and Indian Market and Consumer Preference in Indian Market

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Abstract

In the context of this research, frozen food serves as a focal point for examining evolving consumer behavior in both global and Indian markets. While foreign markets, particularly in developed nations, have long embraced frozen food as an integral part of daily life, the Indian market is witnessing a gradual but significant shift toward its adoption. This shift, influenced by urbanization, changing family structures, and exposure to global food habits, highlights the growing relevance of frozen foods as an area of study. Understanding what frozen food entails is essential to explore its role in shaping consumer preferences, purchasing decisions, and overall market dynamics. This paper delves into the growing demand for frozen foods in foreign and Indian markets, emphasizing the cultural, economic, and technological factors that influence consumer preferences.

Keywords: Indian frozen food market product, frozen fruit market product, Consumer penetration, Urbanization, Cold chain infrastructure, Consumer perception, Product diversification.

Introduction

Foreign Market of Frozen Foods:

The foreign market for frozen foods has experienced remarkable growth over the decades, becoming a dominant segment of the global food industry. Driven by advancements in technology, evolving consumer preferences, and the globalization of food supply chains, frozen foods have established themselves as a staple in households, restaurants, and institutional food services across the world.

Consumer Behaviors in Foreign Market

Consumers in foreign markets typically perceive frozen foods as reliable, high- quality, and time-efficient meal solutions. The acceptance of frozen foods is influenced by:

- High trust in the freezing process to maintain freshness and quality.

- Preference for pre-packaged, portion-controlled products that reduce food waste.
- Willingness to pay a premium for premium-quality frozen food brands.
- Growing interest in healthier options like frozen organic vegetables, plant-based meals, and low-calorie snacks.

Indian Market of Frozen Foods

The frozen food market in India is a burgeoning sector, reflecting changing consumer lifestyles, increasing urbanization, and a growing appetite for convenient and diverse food options. While traditionally, Indian households have relied on fresh and home- cooked meals, the perception of frozen foods has evolved significantly over the past two decades. This shift is driven by a blend of socio-economic, cultural, and technological factors, making frozen foods an increasingly viable choice for Indian consumers.

Consumer Preference in India

Indian consumers' preferences for frozen foods are influenced by a mix of traditional values and modern needs:

- **Convenience without Compromise:** Consumers look for frozen foods that offer convenience while maintaining the Flavors and authenticity of traditional Indian dishes.
- **Health and Nutrition:** There is a growing demand for frozen products made with natural ingredients, no preservatives, and minimal processing, aligning with health-conscious consumption trends.
- **Affordability:** Price sensitivity plays a significant role in purchasing decisions, with consumers often seeking value-for-money products.
- **Taste and Quality:** Indian consumers prioritize taste and freshness, even in frozen foods. Products that replicate the taste of homemade dishes tend to perform better in the market.

The study is novel in terms of its intention to develop a deeper understanding of changing food consumption habits by delving into the factors responsible and their respective effects in a specific context. Historically, the antecedents of frozen food purchase decisions have seldom been studied. Many studies have been conducted in developed economies, but an indisputable study in the Indian context has not been carried out. Focusing on elements influencing eating habits contributes to the ongoing discussion about the aspects that could influence how young

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shoppers feel and why they plan to buy RMFF meals. This study extends the body of knowledge by conceptualizing consumers to include millennial consumers of RMFF food. We may learn more about emerging market economies by focusing on India, a typical developing market in Southeast Asia.

Literature Review

(Shuvro, Neel, & Shusmita, 2019) The study found that both intrinsic factors (like perceived value and quality) and extrinsic factors (such as pricing and branding) significantly influence consumer purchasing decisions for Ready-made Frozen Food (RMFF). Socio-demographic variables, including age, education, and income, also play a critical role. Consumers are increasingly willing to pay a premium for RMFF due to its convenience, taste, and perceived quality, highlighting the need for targeted marketing strategies in this growing market.

(Utami & Chaldun, 2019) The conclusion of the paper emphasizes the importance of aesthetic experience in influencing customer loyalty towards frozen food products. It highlights that while taste is a significant factor, the overall experience of meaning—encompassing product conceptualization, functionality, and associated symbols—plays a more critical role in fostering customer loyalty. The findings suggest that companies should focus on enhancing the aesthetic aspects of their products, including flavor innovation, attractive packaging, and sensory appeal, to create positive customer experiences that encourage repeat purchases. Additionally, the study calls for further research with larger sample sizes to validate and generalize the results more effectively.

(Alsailawi, Mustafa, & Mustafa M., 2020) The conclusion of the paper emphasizes the critical importance of proper refrigerated storage conditions to maintain the quality of frozen foods. It highlights that incorrect storage temperatures can lead to significant quality loss, affecting factors such as texture, flavor, and overall safety of the products. The study also notes that certain additives, like HSA and glycerol, can enhance the shelf-life of extracts at room temperature, but repeated exposure to room temperature may lead to degradation. Overall, the findings underscore the need for careful management of storage conditions to preserve the quality and safety of frozen foods effectively.

(Aakriti & Adeesh, 2022) The conclusion of the research paper underscores a significant transformation in food consumption behavior, illustrating a shift from traditional cereal-based

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products to high-value food items, as well as a movement away from fresh, unprocessed foods towards processed, packaged, and branded alternatives. This evolution is driven by various socio-demographic factors, including the increasing number of working women and single-person households, which have heightened the demand for convenience foods. Additionally, the paper highlights the impact of intrinsic factors, such as product quality and health benefits, alongside extrinsic factors like branding and marketing strategies, which play a crucial role in shaping consumer preferences. The findings suggest that the frozen food market is experiencing robust growth, fueled by changing lifestyles and consumer expectations for quality and convenience. This presents a promising landscape for new entrants looking to capitalize on the expanding opportunities within the frozen food sector, as consumers increasingly seek accessible, affordable, and high-quality food options that align with their busy lifestyles and evolving dietary preferences.

(Aybuke, 2023) This study examines the attitudes and thoughts of individuals towards frozen foods in the Eastern Mediterranean Region. Data from 484 individuals was collected through face-to-face interviews from Jan-2023. Factor analysis was used to identify factors affecting consumption. Most people prefer frozen foods due to their long storage life, practicality, and easy access. Factors such as production, expiry date, brand, and storage conditions were considered when purchasing frozen foods. Meat and chicken meatballs were the most frequently prepared frozen food products at home. Consumers view frozen foods as easy to use and safe. The development of the frozen food sector is expected to increase welfare in rural areas and provide new employment opportunities for women.

Literature Review Gap

There is a research gap regarding the factors that promote long-term customer loyalty beyond the initial purchase, particularly with regard to the experience of meaning and aesthetic elements and how these specifically resonate across India's diverse consumer base, even though existing research identifies key drivers for frozen food consumption in India, such as socio-demographic shifts, convenience, and perceived quality. Additionally, despite the fact that cold chain infrastructure is crucial, especially in rural regions, there aren't many workable, scalable, and regionally relevant techniques for filling these infrastructure gaps and increasing consumer awareness at the same time to encourage broader adoption. To fully realize the

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potential of the Indian frozen food business, more research should be conducted on these important facets of consumer psychology and useful logistics.

Significance of the Study

1. India's frozen food market is rapidly growing, driven by convenience and rising disposable incomes in both domestic and export markets.
2. Indian consumers increasingly favor frozen foods for convenience, taste, and quality, with a growing demand for ready-to-eat and ready-to-cook options.
3. Urbanization, busy lifestyles, and a rising focus on health are driving demand for quick, nutritious, and diverse frozen food options, including plant-based alternatives.
4. Improved cold chain infrastructure and advanced freezing technologies (like IQF) are crucial for maintaining quality, extending shelf life, and expanding market reach.
5. Manufacturers are innovating with new products, healthier options, and better packaging to cater to evolving tastes and overcome consumer perceptions about frozen food freshness.

Objectives of the Study

1. To know the purchase decision of frozen food according to their Gender.
2. To know the quality of frozen food in India as compared to the fresh alternatives.
3. To know the quality of frozen food available in India at different location.
4. To know the willingness of customers who are ready to pay premium price for frozen foods available in India.
5. To know the future demand of frozen food.
6. To know if there are some health-related issues in consuming the frozen food.
7. To know the factors affecting the buying behaviour of the customers in purchasing decision of Frozen foods.

Research Methodology

Research Design: Descriptive research and hypothesis testing.

Data Sources:

- Secondary Data: Secondary data sources are journals, Web portals, etc. of past years.
- Primary Data: Individuals from different regions of Gujarat state via, Google form.
- Research Approach: Survey method

Research Instrument: Structured questionnaire

Data Collection Tool: Google Form for Questionnaire Distribution

Sampling Design:

- Sampling Frame: Buyers of frozen Foods
- Sampling Unit: Age group starting from 18 years and above.
- Sample Size**:** 438
- Sampling Technique: Simple Random Sampling Method

Scope of the Study

1. **Market Demand & Growth:** Analyses the demand for frozen foods in foreign and Indian markets and identifies key growth factors.
2. **Consumer Behaviour & Preferences:** Studies purchasing patterns, preferences, and factors influencing consumer choices in India.
3. **Technological & Retail Impact:** Evaluates the role of freezing technology, cold storage infrastructure, and e-commerce in expanding the market.
4. **Challenges & Barriers:** Identifies obstacles like supply chain issues, cultural perceptions, and regulatory constraints affecting market growth.
5. **Future Trends & Business Opportunities:** Explores emerging trends, potential innovations, and strategic recommendations for market expansion.

Limitations of the Study

1. Enough responses are not collected from outside Ahmedabad, so not able to see the future demand of other areas
2. Enough responses are not collected from NRI's so not able to study the consumer preference of the NRI's.
3. The more of responses are of the category of students so don't able to study the demand and the consumer preferences in other groups.
4. The study primarily focuses on urban areas, with less representation from rural regions.
5. The affordability and willingness to pay for frozen foods vary across different income groups.

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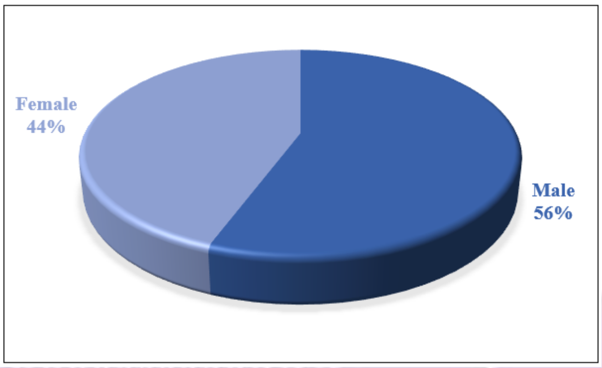
Data Analysis and Interpretation

Objective 1: To know the purchase decision of frozen food according to their Gender.

Gender	Frequency	Percentage
Male	244	56%
Female	194	44%
Total	438	100%

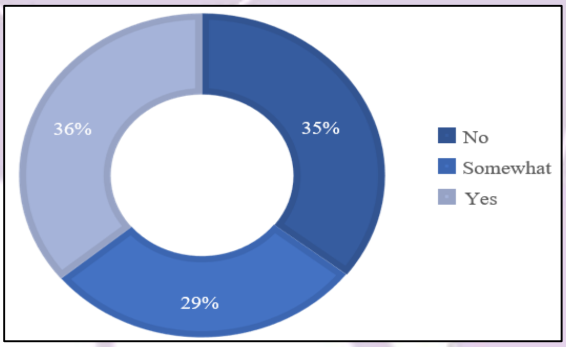


Interpretation:

Male respondents make up 56% (244), while females account for 44% (194). This indicates a slight male dominance in the sample group.

Objective 2: To know the quality of frozen food in India as compared to the fresh alternatives.

Particulars	Frequency	Percentage
Yes	140	36%
No	138	35%
Somewhat	111	29%
Total	389	100%

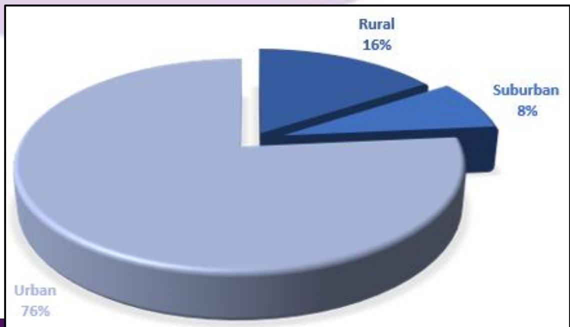


Interpretation:

Responses are quite balanced: “Yes” (140), “Somewhat” (111), and “No” (138). Consumers are still divided on the quality of frozen foods compared to fresh alternatives.

Objective 3: To know the quality of frozen food available in India at different location.

Location	Frequency	Percentage
Urban	335	76%
Rural	69	16%
Sub urban	34	8%
Total	438	100%



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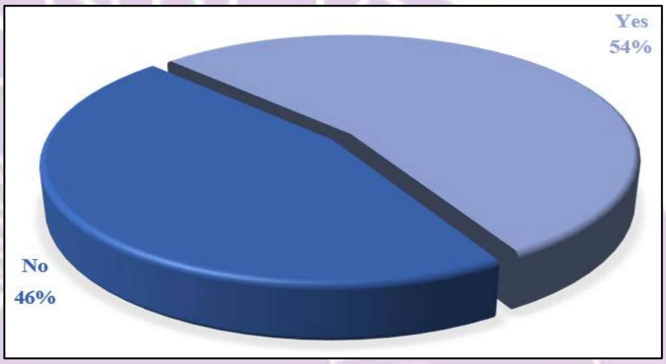
Interpretation:

Urban residents dominate the sample (335), followed by rural (69) and suburban (34). This suggests that frozen food consumption is more prevalent in urban areas.

Objective 4: To know the willingness of customers who are ready to pay premium price for frozen foods available in India.

Particulars	Frequency	Percentage
Yes	211	54%
No	178	46%
Total	389	100%

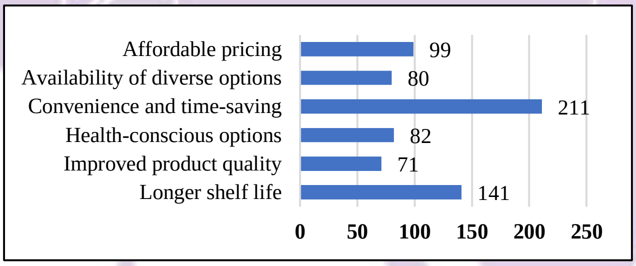


Interpretation:

211 respondents indicated they would continue purchasing frozen foods, while 178 said no. This suggests a strong future market, though some remain hesitant.

Objective 5: To know the future demand of frozen food.

Particulars	Frequency	Percentage
Longer shelf life	141	21%
Improved product quality	71	10%
Health-conscious options	82	12%
Convenience and time-saving	211	31%
Availability of diverse options	80	12%
Affordable pricing	99	14%
Total	684	100%

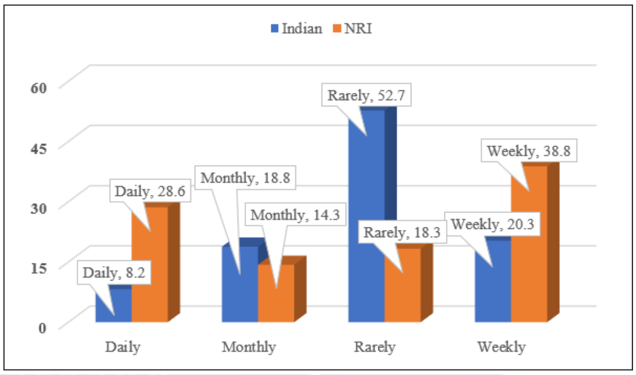


Interpretation:

Convenience and time-saving” is the top factor (211), followed by longer shelf life (141), affordable pricing (99), and health-conscious options (82). This highlights convenience as the primary driver.

How often do you purchase frozen food product?

Particulars	Indian (%) (389)	NRI (%) (49)
Daily	8.2	28.6
Monthly	18.8	14.3
Rarely	52.7	18.3
Weekly	20.3	38.8
Total	100	100

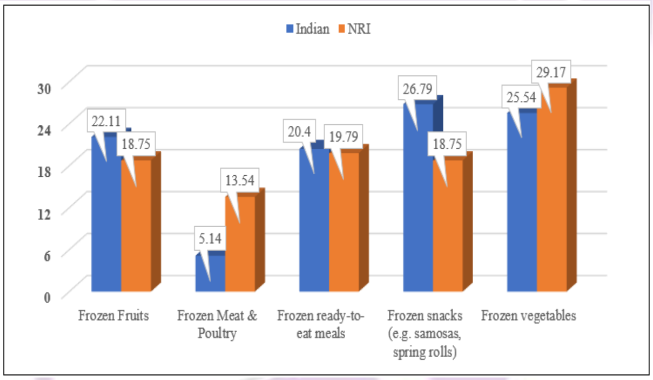


Interpretation:

The chart shows that NRIs purchase frozen food more frequently than Indians, with higher daily (28.6%) and weekly (38.8%) consumption. In contrast, a majority of Indians (52.7%) rarely buy frozen food. It indicates that frozen food is more regular part of NRIs' diets compared to Indians.

What type of frozen food products do you prefer?

Particulars	Indian (%) (642)	NRI (%) (96)
Frozen Fruits	22.11	18.75
Frozen Meat & Poultry	5.14	13.54
Frozen ready-to-eat meals	20.4	19.79
Frozen snacks (e.g. samosas, spring rolls)	26.79	18.75
Frozen vegetables	25.54	29.17
Total	100	100



Interpretation:

The chart shows that Indians prefer frozen snacks (26.79%), while NRIs Favor frozen vegetables (29.17%) the most. Frozen meat & poultry consumption is low among both groups. Overall, preferences vary, but frozen vegetables & snacks are the most popular choices.

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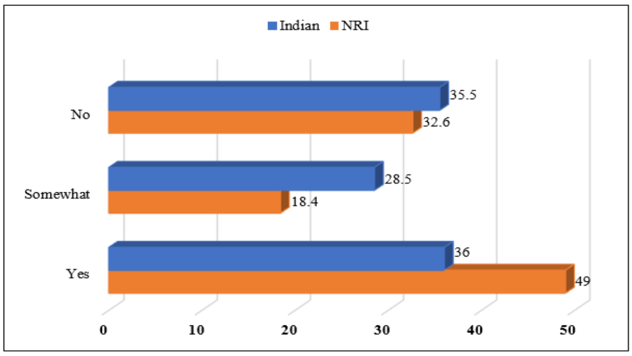
Do you think the quality of frozen foods are good as compared to fresh alternatives?

Particulars	Indian (%) (389)	NRI (%) (49)
Yes	36	49
Somewhat	28.5	18.4
No	35.5	32.6
Total	100	100

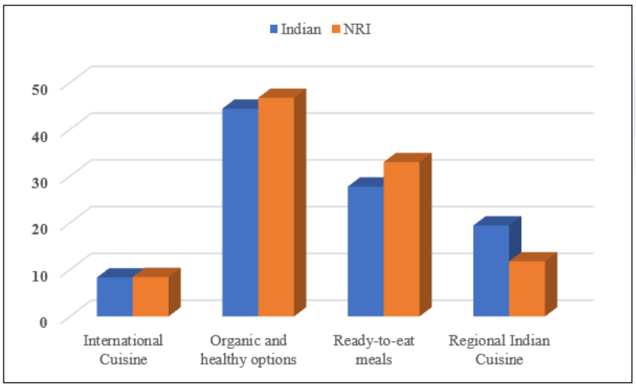


Interpretation:

The chart shows that NRIs (49%) believe frozen food is of good quality more than Indians (36%). However, Indians are more sceptical, with 35.5% saying "No" compared to 32.6% of NRIs. Overall, NRIs have a more positive perception of frozen food quality.

What type of frozen food products would you like to see more of in the future?

Particulars	Indian (%) (509)	NRI (%) (72)
International Cuisine	8.33	8.44
Organic and healthy options	44.44	46.76
Ready-to-eat meals	27.78	33.01
Regional Indian Cuisine	19.45	11.79
Total	100	100



Interpretation

Both Indians (44.44%) and NRIs (46.76%) prefer more organic and healthy options in frozen foods. NRIs (33.01%) also favour ready-to-eat meals more than Indians (27.78%), while Indians (19.45%) prefer regional cuisine more than NRIs (11.79%).

Chi-Square Test

$H0$: There is no association between purchasing frozen foods product according to their Gender.

$H1$: There is association between purchasing frozen foods product according to their Gender.

			Frequency of purchase of Frozen Food in India.				Total
			Daily	Monthly	Rarely	Weekly	
Gender	Female	Count	11	36	99	32	178
		Expected Count	14.6	33.4	93.8	36.1	178.0
	Male	Count	21	37	106	47	211
		Expected Count	17.4	39.6	111.2	42.9	211.0
Total		Count	32	73	205	79	389
		Expected Count	32.0	73.0	205.0	79.0	389.0

Chi-Square Tests			
	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	3.451[a]	3	.327
Likelihood Ratio	3.493	3	.322
N of Valid Cases	389		
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 14.64.			

As p (0.327) > 0.05, we accept $H0$ so we conclude that there is no association between purchasing frozen foods product according to their Gender.

Chi-Square Test

$H0$: There is no significant difference in quality of frozen foods in India compared to fresh alternatives, regardless of gender.

$H1$: There is significant difference in quality of frozen foods in India compared to fresh alternatives, with gender influencing the perception of frozen food quality.

			Frozen foods in India are of good quality compared to fresh alternatives			Total
			No	Somewhat	Yes	
Gender	Female	Count	60	60	58	178
		Expected Count	63.1	50.8	64.1	178.0
	Male	Count	78	51	82	211
		Expected Count	74.9	60.2	75.9	211.0
Total		Count	138	111	140	389
		Expected Count	138.0	111.0	140.0	389.0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	4.424[a]	2	.109
Likelihood Ratio	4.417	2	.110
N of Valid Cases	389		

a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 50.79.

As p (0.109) > 0.05, we accept $H0$ so we conclude that there is no significant difference in quality of frozen foods in India compared to fresh alternatives, regardless of gender.

Chi-Square Test

$H0$: The quality of frozen food in India is independent of location compared to fresh alternatives.

$H1$: The quality of frozen food in India is dependent of location compared to fresh alternatives.

			Frozen foods in India are of good quality compared to fresh alternatives			Total
			No	Somewhat	Yes	
Location	Rural	Count	20	11	33	64
		Expected Count	22.7	18.3	23.0	64.0
	Suburban	Count	8	11	6	25
		Expected Count	8.9	7.1	9.0	25.0
	Urban	Count	110	89	101	300
		Expected Count	106.4	85.6	108.0	300.0
Total		Count	138	111	140	389
		Expected Count	138.0	111.0	140.0	389.0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	11.406[a]	4	.022
Likelihood Ratio	11.232	4	.024
N of Valid Cases	389		

a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 7.13.

$p - value$ (0.022) < 0.05, We reject $H0$ and conclude that the quality of frozen food in India is dependent of location compared to fresh alternatives.

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Chi-Square Test

$H0$: Age and willingness to pay a premium price for higher-quality frozen food products in India are independent.

$H1$: Age and willingness to pay a premium price for higher-quality frozen food products in India are dependent.

			Willing to pay a premium price for higher-quality frozen food products in India		Total
			No	Yes	
Age	18-24	Count	136	139	275
		Expected Count	125.8	149.2	275.0
	25-34	Count	25	31	56
		Expected Count	25.6	30.4	56.0
	35-44	Count	6	13	19
		Expected Count	8.7	10.3	19.0
	45 Above	Count	1	13	14
		Expected Count	6.4	7.6	14.0
	Under 18	Count	10	15	25
		Expected Count	11.4	13.6	25.0
Total		Count	178	211	389
		Expected Count	178.0	211.0	389.0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	11.826[a]	4	.019
Likelihood Ratio	13.725	4	.008
N of Valid Cases	389		

a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 6.41.

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$p - value$ (0.019) < 0.05, We reject $H0$ and conclude that the age and willingness to pay a premium for higher-quality frozen food products in India are dependent.

Chi-Square Test

$H0$: Trust in the quality of frozen foods in India and willingness to pay a premium for them are independent.

$H1$: Trust in the quality of frozen foods in India and willingness to pay a premium for them are dependent.

			Willing to pay a premium price for higher-quality frozen food products in India?		Total
			No	Yes	
Do you trust the quality of frozen foods available in India?	Not trustworthy	Count	44	16	60
		Expected Count	27.5	32.5	60.0
	Somewhat trustworthy	Count	116	98	214
		Expected Count	97.9	116.1	214.0
	Yes, very trustworthy	Count	18	97	115
		Expected Count	52.6	62.4	115.0
Total		Count	178	211	389
		Expected Count	178.0	211.0	389.0

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Chi-Square Tests			
	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	66.530[a]	2	.000
Likelihood Ratio	71.938	2	.000
N of Valid Cases	389		
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 27.46.			

$p - value$ (0.000) < 0.05, We reject $H0$ and conclude that the trust in the quality of frozen foods in India and willingness to pay a premium for them are dependent.

Chi-Square Test

$H0$: Future demand of frozen food in India is related to the Gender.

$H1$: Future demand of frozen food in India is not related to the Gender

			Frozen foods becoming more popular in the Indian market in the future.				Total
			No, it will decline	No, it will stay the same	Yes, moderately more popular	Yes, significantly more popular	
Gender	Female	Count	8	28	84	58	178
		Expected Count	11.9	25.2	75.5	65.4	178.0
	Male	Count	18	27	81	85	211
		Expected Count	14.1	29.8	89.5	77.6	211.0
Total		Count	26	55	165	143	389
		Expected Count	26.0	55.0	165.0	143.0	389.0

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Chi-Square Tests			
	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	6.262[a]	3	.100
Likelihood Ratio	6.346	3	.096
N of Valid Cases	389		
a. 0 cells (0.0%) have expected count less than 5. The minimum expected count is 11.90.			

$p - value$ (0.100) > 0.05, We accept $H0$ and conclude that the future demand of frozen food in India is related to the gender.

Findings

1. Younger Consumers Dominate – Majority of frozen food buyers are aged 18- 24 years (68%), indicating a preference among young individuals.
2. Urban Market Leads – 76% of buyers are from urban areas, while rural adoption remains low due to infrastructure limitations.
3. Frozen Snacks & Vegetables Preferred – Frozen snacks (27%) and vegetables (26%) are the most popular, while frozen meat & poultry have the least demand.
4. Convenience Drives Demand – 31% of consumers prioritize convenience, while 21% value longer shelf life in frozen foods.
5. Trust & Quality Concerns – Only 30% fully trust frozen food quality, while 35% feel it is not as good as fresh alternatives.
6. Future Growth Expected – 42% believe frozen food will become moderately popular, and 37% expect significant growth.
7. Willingness to Pay More Linked to Trust – Chi-square tests confirm that consumers who trust frozen food quality are more willing to pay a premium.

Recommendations

1. Expand Rural Market Reach – Improve cold storage infrastructure and awareness campaigns to boost frozen food adoption in rural areas.

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2. Enhance Consumer Trust – Educate consumers on freezing technology and product safety to address concerns about frozen food quality.
3. Increase Healthy & Organic Options – Introduce more organic, preservative-free, and nutritious frozen foods, as 73% of consumers demand healthier choices.
4. Improve Product Variety – Develop regional Indian cuisine and international flavours to cater to evolving taste preferences.
5. Strengthen Marketing & Branding – Highlight convenience, quality, and health benefits through digital marketing and influencer promotions.
6. Make Pricing More Competitive – Offer affordable frozen food options and target price-sensitive consumers with discounts and bulk offers.
7. Leverage E-commerce Growth – Expand online sales and direct-to- consumer delivery to tap into the rising demand for digital grocery shopping.

Conclusion

The study on the demand for frozen foods in both foreign and Indian markets, along with consumer preferences in India, reveals significant trends and challenges. The research indicates that convenience, busy lifestyles, and longer shelf life are the primary drivers of frozen food adoption, particularly among younger consumers (18- 24 years) and urban residents (76%). However, rural areas still face barriers due to limited cold storage infrastructure and a preference for fresh food. Despite the increasing popularity of frozen foods, consumer trust in quality remains a major concern, with only 30% fully trusting frozen products, while 35% feel they are not as good as fresh alternatives. The willingness to pay a premium is directly linked to consumer trust, as confirmed by the chi-square test. Additionally, the study finds a growing demand for healthier, organic, and preservative-free frozen food options (73%), signalling a shift towards health-conscious eating habits. To bridge the existing gaps, the frozen food industry must focus on product diversification, consumer education, and improved distribution channels. Companies should invest in expanding rural market reach, leveraging e-commerce growth, and developing pricing strategies to attract price-sensitive consumers. Strengthening branding and marketing through digital platforms and influencer collaborations can also enhance consumer trust. With rising urbanization, increasing disposable incomes, and evolving dietary habits, the future of the frozen food industry in India looks promising. By addressing

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quality concerns, offering healthier choices, and improving affordability, businesses can capitalize on this growing sector and ensure long-term market expansion.

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