Strategic Alternatives for Fruits and Vegetables
Short Value Chains

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Health

The joy of veg-maxxing: how to eat many, many more plants – without really trying



Lucy Knight

Share



Lucy Knight embarks on her veg-maxxing journey. Photograph: Harriet Cachia/The Guardian

A new report has found many crops are far less nutritious than they once were, so we need to eat more of them. Here is how to get your five portions of fruit and veg a day, easily and affordably – and potentially increase that to ten

When Eva Humphries first started working as a nutritionist, she met a client who had just found out he had high blood

Most viewed



US
Iran targets Bahrain airbase as strikes resume in Gulf – Middle East crisis live

https://www.theguardian.com/society/2026/oct/25/the-joy-of-veg-maxxing-how-to-eat-many-many-more-plants-without-really-trying



Nutrient Maxxing Soups

„Where I buy a ton of frozen veggies.
I don‘t have to wash or cut anything.
I just dump it into a pot and cook“.

55

2

Power structures & market failure

101.000 Farmers
in Austria



Agricultrual
Production Value
€ 10,9 Mrd.

3 dominant
Supermarketchains
with 90% Marketshare

Sales Supermarket
chains
€ 30 Mrd.



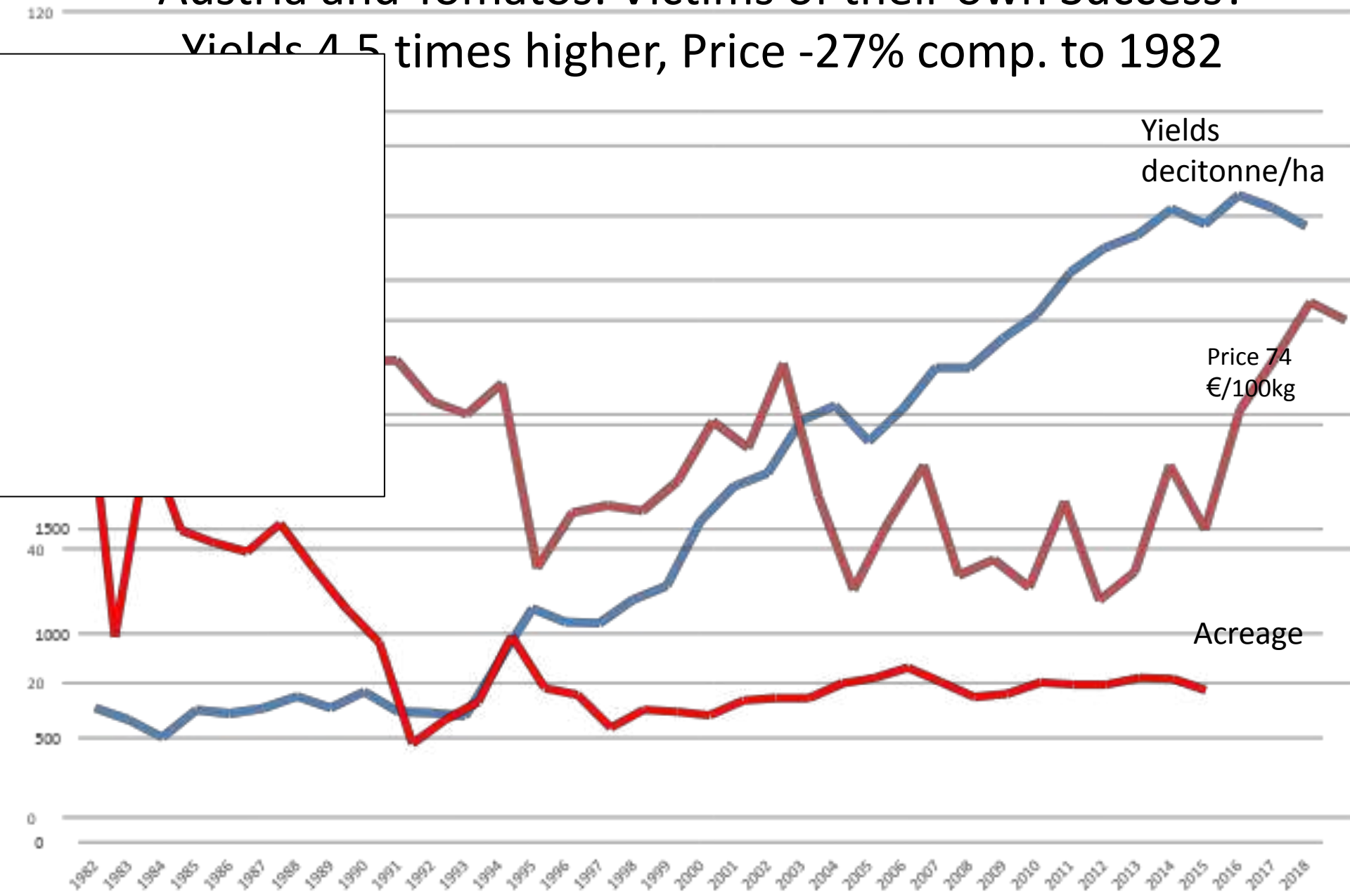
>80% Urban Consumers with
preference for regional food

markta

Quellen: STATISIK AUSTRIA - http://www.statistik.at/web_de/services/publikationen/8/index.html?includePage=detailedView&sectionName=Land+und+Forstwirtschaft&pubId=376
SENAT DER WIRTSCHAFT ÖSTERREICH - http://www.senat-oesterreich.at/plaedoyer/2018-nr-3-lebensmitteleinzelhandel-die-macht-begrenzen // MARKTA market survay 2018 n=766

Austria and Tomatos: Victims of their own Success?

Yields 4.5 times higher, Price -27% comp. to 1982



Quelle: AMA (2023): Annual Fruits and Vegetables Report.



Alternative Food Networks circumvent Supermarkets.
Higher Margins but lower Volume!

Examples of Alternative Short Food Supply Chains:

- Community Supported Agriculture
- Market Gardens
- Food Coops
- Food Box Systems (Adamah)
- Participatory Supermarkets (MILA)
- Food Assembly Networks (La Ruche qui dit qui)
- …

Short Food Supply chains define Producer-Consumer Relationsships new by clear Signals about the Origin of the Food Product!
(Marsden et al., 2000)

3 Forms of Short Food Supply Chains:

- Face-to-face
- Spatially near
- Spatially distant

→ Agricultural Directmarketing

→ Produced and distributed over gastronomy, specialty stores and supermarkets





Serrano, Parma





Two Farmers produce 24% of the Austrian Tomatos.



24% des österreichischen Tomatenmarktes

- Through Economies of Scale lower fix costs and higher competitiveness.
- Disadvantage: High need for dept capital
- Frutura: 70 and 92 Mio. Euro investment
- Zeiler (REWE): 21 Mio. Euro

www.frutura.com, www.tomaten.at

Most farms are average! Which strategy for an average farm?





24% des österreichischen Tomatenmarktes

For smaller farms the strategy has to be Quality Leadership!

- Price Leadership is only possible through Economies of Scale, and permanent growth in size.
- Examples in Austria: Futura and Zeiler

Fruchtige Frieda

DAS ORIGINAL VON ZEILER



Food Spending

€ 1,89



€ 4,80

Food Pioneers

+ 637%

€ 0,76

€ 1,19



Gourmets

FOODIES



Sensible Eaters



Convenience Eaters

Eat the Fillers

Price per kg

Relationship to Food

Food Spending

€ 7,00

€ 8,40
Chia
Seeds





+ 750%



€ 5,20
Free
from

Classical
Gourmets

Food
Pioniere

FOODIES

€ 1,10

Sensitive
Eaters



Convenience
Esser

Sattesser

Price per kg

Relationship to Food

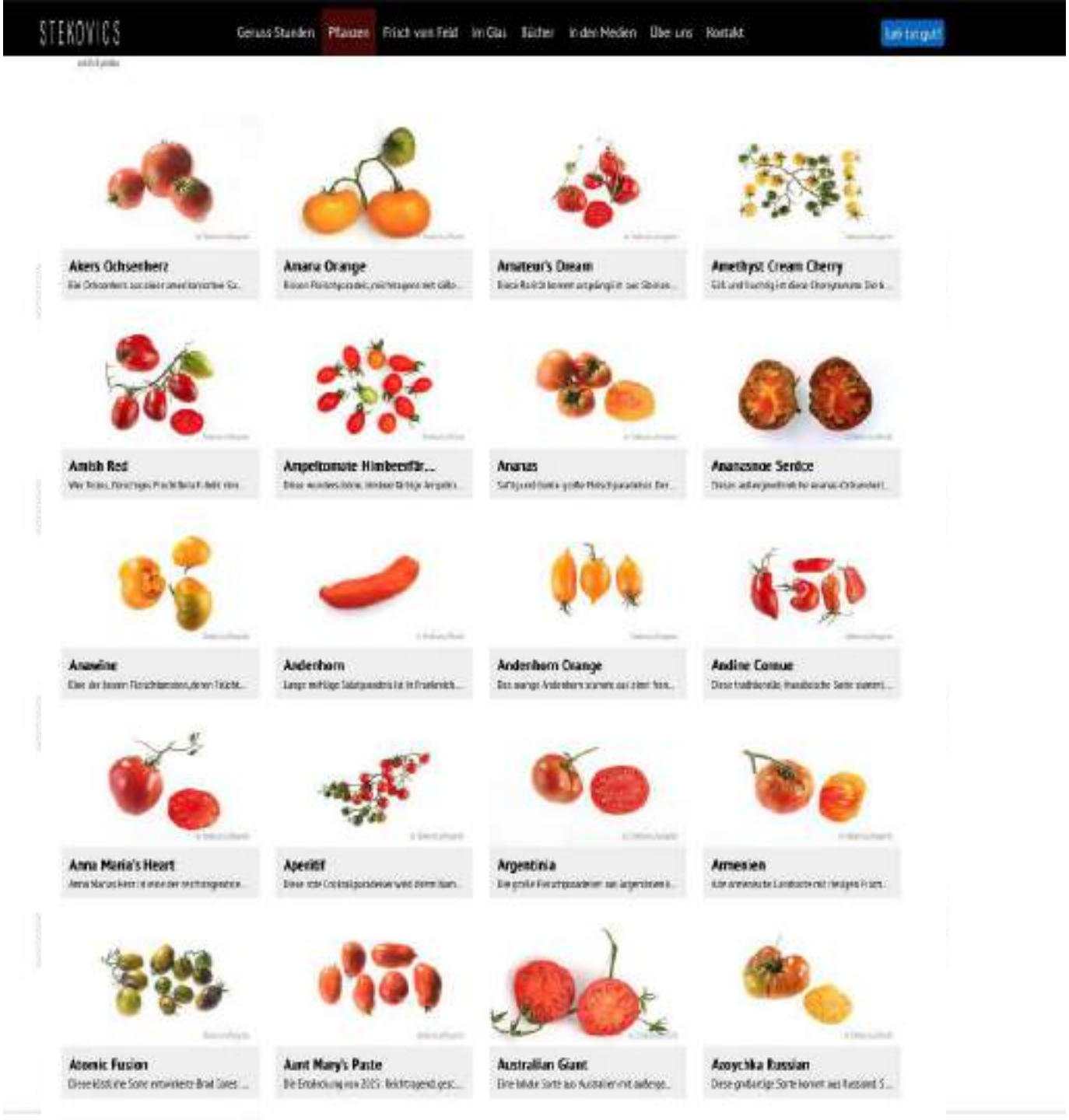


Josef Zotter:
„Look for a mass market and then create your niche!“

www.zotter.at

When everybody produces Tomatoes, how can you be different?
Stegovic occupies the niche of Heritage varieties!





In Short Food Supply Chains the Farmer is the brand.

Personality
Knowledge
Tradition
Heritage

Stegovics offers 232 different tomato varieties

Plants to EAT



Plants to READ



A BRAND offers a whole world, not just products!!!

Plants to PRESERVE



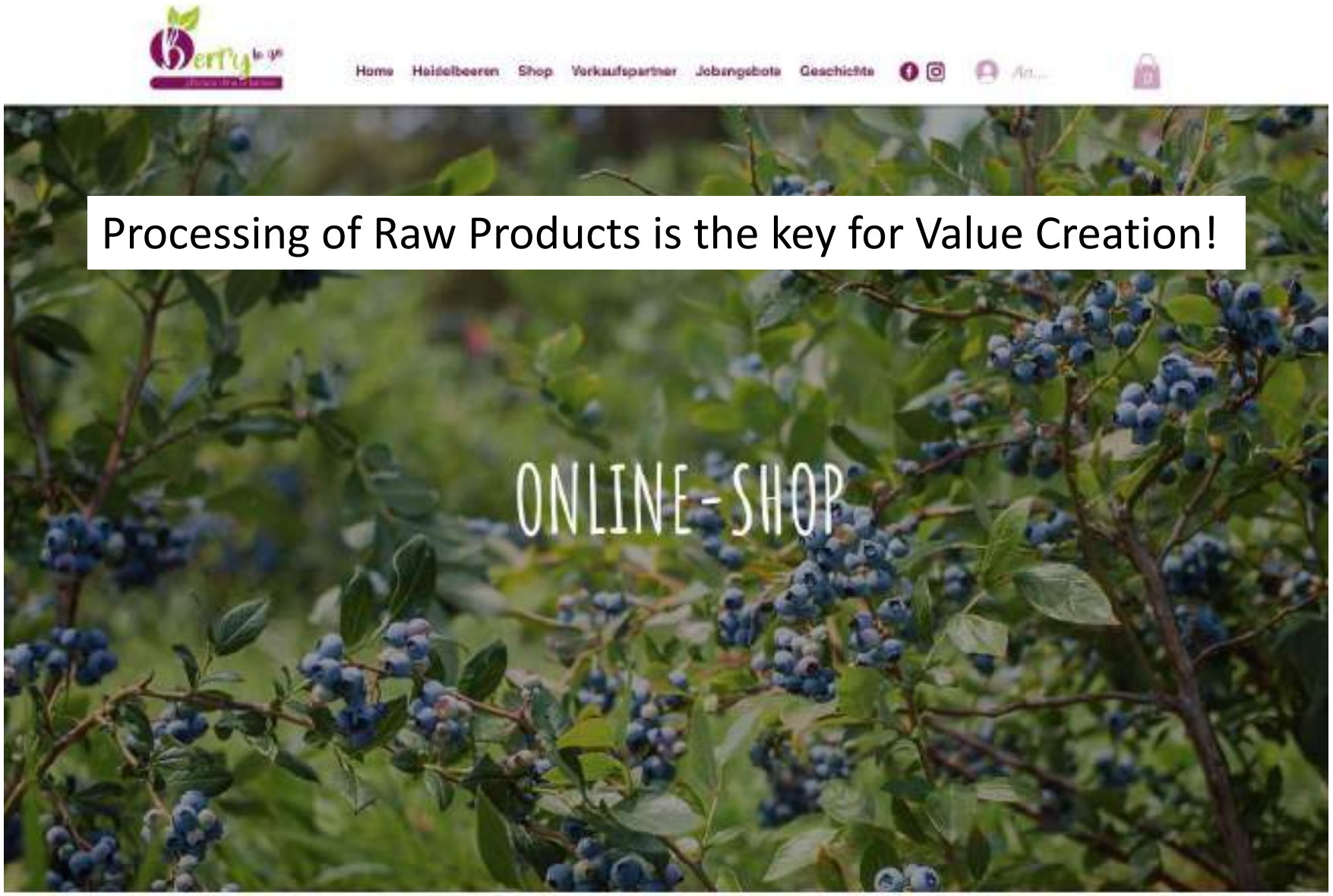
Plants to PLANT



Mega Trend Health

- Fiber will be the next Mega Trend (after High Protein)
- Opportunity for Berries and Nuts





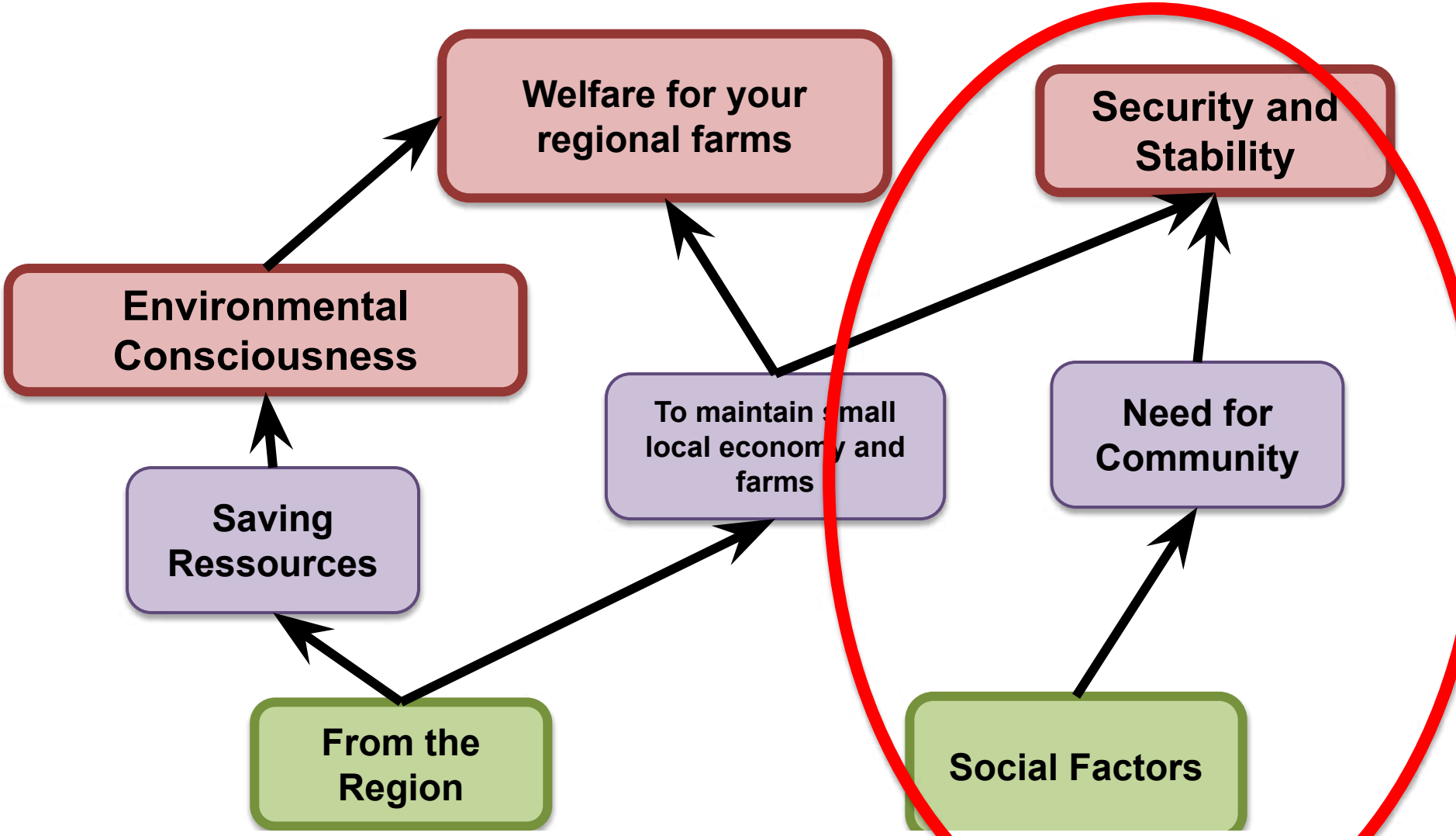
https://www.berrytogo.at

Dried Berries Liquor Jam Powder Chocolate Juices/Sirup Spices Gift Boxes

The Fruits and Veggies Consumer



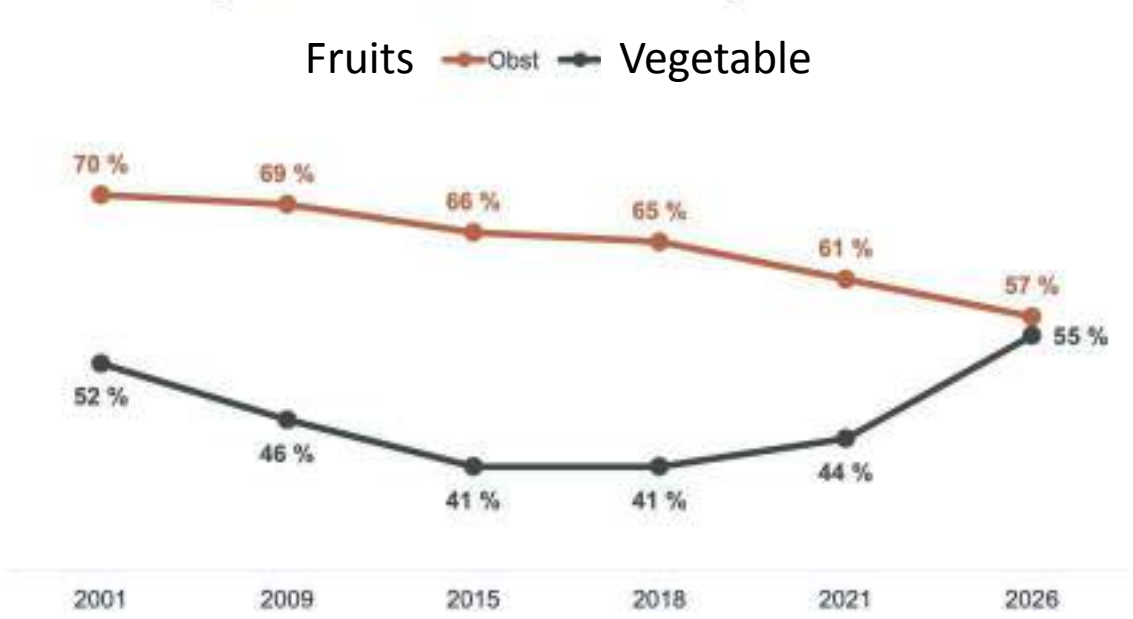
Motives to buy directly from the Farm: Regional origin and community.



Sterkl Paul (2016): Motive von Frischgemüsekonsumenten zur der Einkaufsstättenwahl bei Frischgemüsekonsumenten. Eine Wertkettenanalyse von KonsumentInnen in Niederösterreich und Wien

Veggies are the new Fruits in Austria

Share of „at least daily consumption“ Fruits and Vegetables



Fruits

–13 Pp.

seit 2001 (70 % → 57 %)

Vegetables

+14 Pp.

seit 2018 (41 % → 55 %)

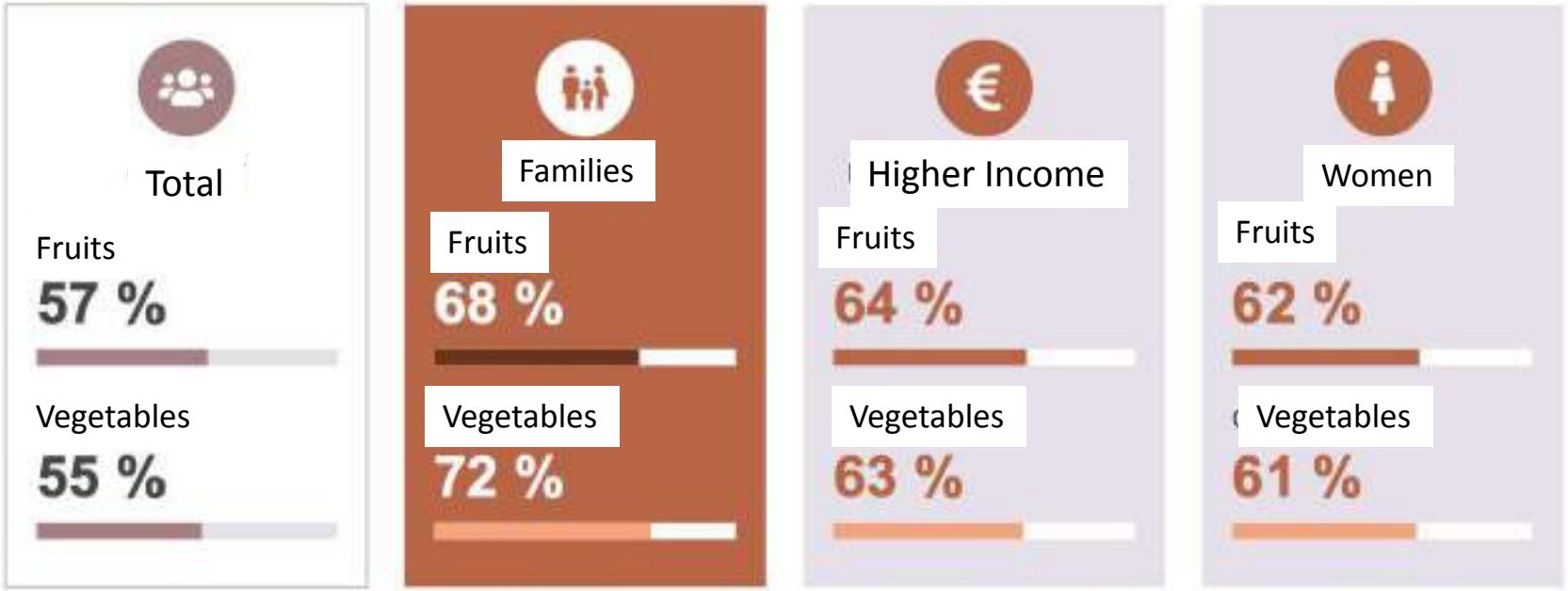
Angaben in %; mind. täglich = mehrmals täglich + ca. einmal täglich; 2026: n=1.827, 2021: n=1.880; bis 2021 auf den Haushalt bezogen gefragt („Wie oft wird in Ihrem Haushalt ... gegessen?"), 2026 persönlicher Konsum

Quelle: RollAMA Meinungsbild Juli 2025 / AMA-Marketing

RollAMA

Main target groups are families, higher income groups or (urban) women!

Share of „at least daily consumption of fruits and vegetables“ by target groups



Gesamtstichprobe; Angaben in %; n=1.827; mind. täglich = mehrmals täglich + ca. einmal täglich; Familien = Haushalte mit 4+ Personen (n=311); Hohes Einkommen = über 3.500 EUR HH-Nettoeinkommen (n=697); Frauen (n=1.304)

Quelle: RollAMA Motivanalyse Juli 2020 / AMA-Marketing

RollAMA

Price most frequent barrier to consume more Fruits & Veggies

Warum fällt es Ihnen manchmal schwer, ausreichend frisches Obst und/oder Gemüse zu konsumieren?
(Mehrfachnennungen möglich)

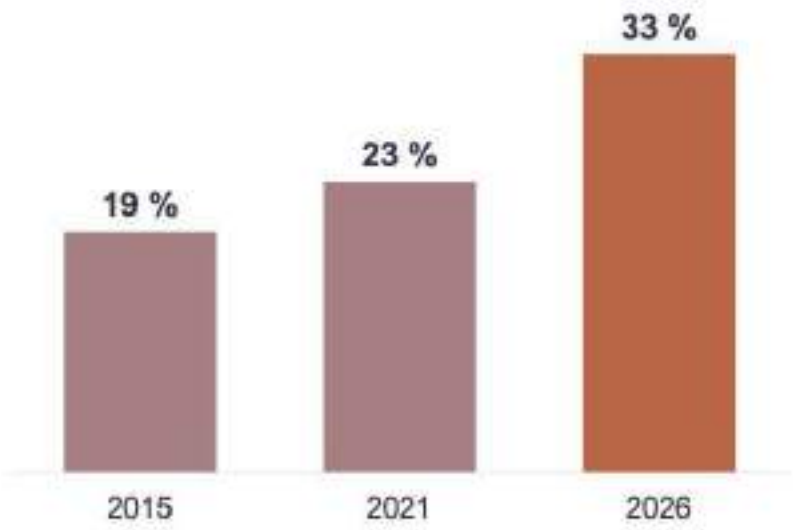


Basis: Personen, denen es manchmal schwerfällt, ausreichend frisches Obst und/oder Gemüse zu konsumieren (31 % aller Befragten); Angaben in %, n=954
Quelle: RollAMA Motivanalyse Jan 2026 / AMA-Marketing

Peeling of Pomegranate or Ananas, cleaning of Artichokes, peeling of Asparagus …

Snack Trend: Snack Vegetables / Raw Veggies

Veggies are increasingly eaten as a Snack!



61 % often eat raw fruits as snack

37 % look for more Snack Fruit/Veggies

43 % Of the 30 to 49 year old want more Snack offers

Basis: Personen, die zumindest selten Obst und Gemüse konsumieren; Angaben in %; 2026: n=1.815, 2021: n=1.853; Wert = „häufig"

Quelle: RollAMA Marktanalyse Juli 2026 / AMA-Marketing

RollAMA

From Sprouts to Bar – Rauer‘s Ernte www.rauersernte.at



https://www.sprossengarten.at/

Health Food
Superfood
Clean Food



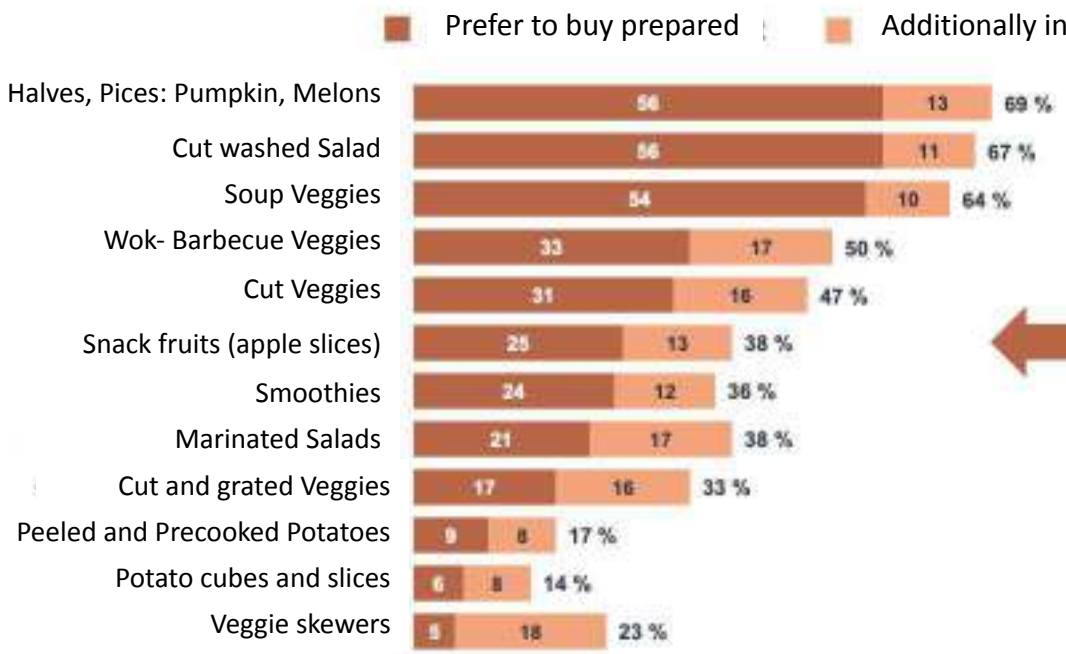






https://www.obst-oswald.at/de/product-category/schofrulade/?v=7d0db380a5b9

Potential for Convenience Fruits and Veggies



21% buy convenience fruits and veggies!

Basis: Personen, die bestimmtes Obst/Gemüse gerne vorbereitet kaufen; Angaben in %, n=384 bzw. n=382 (Interesse nur, wenn nicht bereits gekauft); Summe = Gesamtpotenzial: 21 %; n=1.815

Quelle: RollAMA Motivanalyse Jul 2020 | AMA-Marketing

RollAMA

HIGHLIGHTS



Smoo ist das trendige Smoothie-Pack mit frischen Früchten & Gemüse im Tiefkühlregal!

https://www.obst-oswald.at/de/product-category/schofrulade/?v=7d0db380a5b9

Waldland is Europe‘s biggest Chopped Chive Producer!

How to create Added Value with Chive?!

- 100 ha Acreage
- 250 tons Dried Chopped Chive per Season
- Value Creation: 3 Mio €





Conclusion

- Price is the biggest barrier
- Quality and Premium is the only way forward
- Processing is key for Value Creation
- Health, Convenience and Snacking Trends offer new Market Opportunities

Thank you for your attention!

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http://www.wiso.boku.ac.at/mi_haas.html