Mass catering as a driver for Austrian organic agriculture

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The importance of mass catering in Austria

Mass catering is defined by “price-limited meals for a limited group of people in a place where a longer stay of these people is necessary due to organizational reasons” (BMLFUW 2010)

→ public and private and via full or partial catering

→ such as in childcare facilities, schools, hospitals, nursing and senior homes, penal institutions, company kitchens, cafeterias of colleges and universities as well as canteens in training centers of the Federal Army…

→ These institutions serve around 1,847,300 meals per day! (2017)

estimations: 2%-3% increase per year
Mass catering is not an easy topic

- Poor availability of data
- No clear distinction between public and private catering
  
  In 2010, the proportion of communal facilities run by third-party companies was around 20% (percentage still growing). (BMLFUW 2010)

- Price plays a critical role
  
  3,55€ per person is available for large public companies for food purchase, which includes costs for daily five meals and beverages (Gruber und Holler 2017)
The aims of this study was

(1) to show and assess the current status of (public) mass catering procurement in Austria

(2) to calculate the potential regarding Austrian organic food.

→ two scenarios:

a monetary organic share of 60% and 100% in food procurement.
Systematic approach of modelling the status quo

Modelling the status quo and scenarios of the Austrian organic and conventional land consumption by mass catering institutions.

Needed Data:

(1) Land use per product
(2) Organic and conventional prices
(3) Required quantities:
   Quantities of each product group, organic/conventional & origin
Systematic approach of modelling the statues quo

**Conditions**

(1) Statistical organic and conventional yield values for Austrian conditions

→ Average land demand for each product group

(2) Price survey for C+C markets for the year 2017

organic & conventional

→ Average purchase prices
Systematic approach of modelling the statues quo

Conditions

(3) Required quantities:
  – daily consumed meals extrapolated to yearly quantities
  – based on the nutritional recommendation of the 'The German Nutrition Society' (DGE) for children and adults
  – plus actual per capita consumption of meat
  – plus the avoidable food waste of Austrian canteen kitchens

➢ AT / non-AT and organic / conv. shares were taken from the UMBESA study (RMA 2013), a Bio-Austria study (GRUBER & HOLLER 2017) and expert knowledge
Status Quo:
Required quantities for mass catering sourced from Austria (per product group)

<table>
<thead>
<tr>
<th>Product Group</th>
<th>Demand Sourced from Austria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meat*</td>
<td>47%</td>
</tr>
<tr>
<td>Eggs</td>
<td>38%</td>
</tr>
<tr>
<td>Milkproducts</td>
<td>75%</td>
</tr>
<tr>
<td>Vegetables</td>
<td>55%</td>
</tr>
<tr>
<td>Fruits</td>
<td>15%</td>
</tr>
<tr>
<td>Sugar</td>
<td>65%</td>
</tr>
<tr>
<td>Fat and oils</td>
<td>10%</td>
</tr>
<tr>
<td>Grains</td>
<td>43%</td>
</tr>
</tbody>
</table>

* incl. animal fat, excl. fish
Status Quo:
Required quantities for mass catering sourced from Austria (per product group)

Results

7% 8,4% 19% 23% 3% 20% 1% 10% 0%

Meat* Eggs Milkproducts Vegetables Fruits Sugar Fat and oils Grains

Demand Sourced from Austria

Organic demand sourced from Austria

* incl. animal fat, excl. fish
Status Quo: needed land for organic products sourced from Austria (per product group)
Status Quo:
Agricultural Area consumed by mass catering

Agricultural land used for mass catering:

132,139 ha (+/-2%)
Status Quo: Agricultural Area consumed by mass catering

Agricultural land: **2,671,174 ha**

Agricultural land used for mass catering:

**132,139 ha** (+-2%)  
(5% of total agr. area)

Organic Agricultural land used for mass catering:

**35,364 ha** (+-2%)

https://i.imgur.com/sjngsUe.jpg
What would happen if the organic share would be increased?

agricultural land total

5% for mass catering.
What would happen if the organic share would be increased?

agricultural land total

5% for mass catering
1,3% organic
What would happen if the organic share would be increased?

22% organic agricultural area
What would happen if the organic share would be increased?

- **agricultural land total**
  - 22% organic agricultural area
  - 6% for mass catering
What would happen if the organic share would be increased?

60% organic in mass catering

agricultural land total

22% organic agricultural area
9% for mass catering
What would happen if the organic share would be increased?

100% organic in mass catering

agricultural land total

22% organic agricultural area
24% for mass catering

3,8 times more!
What would happen if the organic share would be increased?

- Additional need of ~19,600ha / 100,000ha agricultural land
- Costs of goods would increase 9% / 24% for mass catering institutions

...what about:
- Demanded quantities that are imported to Austria?
- Feedback and market effects due to increased demand?
- Further impacts for land use change?
- Changes in diet and mass catering systems?
- Availability of organic food?
...it's just the beginning

Additional Research

• for a better database for required quantities of the public catering
• Feedback and market effects
• Analyzes for the further value chain, e.g. increasing demand for processing, inputs for organic farming, etc.
THANK YOU!

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For more Information go to:
https://www.fibl.org/de/projektdatenbank/projektitem/project/1440.html
https://presse.greenpeace.at/studie-zeigt-gemeinschaftsverpflegung-k%C3%B6nnte-bio-landwirtschaft-deutlich-ankurbeln/