

Trans-Local Food Coalitions in Germany, Switzerland and Austria

Summary of survey results

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January 2026

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Please cite as: Espinosa Flor, S., Hennchen, B., Kaiser, A., López Cifuentes, M., Bornemann, B. (2026). Trans-Local Food Coalitions in Germany, Switzerland and Austria, Summary of survey results. Basel: University of Basel.

Cover

Logo design: Lukas Höllebauer

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The survey was conducted as part of the research project 'Food coalitions beyond the local scale: spaces for a democratic sustainability transformation' (SNSF Grant No. 219769), funded by the Swiss National Science Foundation (SNSF), the Austrian Science Fund (FWF), and the German Research Foundation (DFG).

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1. Background and participating organizations

In recent years, new forms of collaboration between food producers, consumers and other key actors across national borders have emerged. These initiatives seek to provide an alternative to today's globalized food system by creating closer, more transparent relationships between the people involved in producing and consuming food. We refer to these initiatives as **Trans-Local Food Coalitions (TLFCs)**. TLFCs are organizations that trade food across countries while actively strengthening social, economic and ethical connections between producers, consumers and other partners in different locations.

This report summarizes the **results of a survey among 63 TLFCs in the Germany–Switzerland–Austria (GSA) region**. The survey is part of the broader research project “Food coalitions beyond the local scale: spaces for a democratic sustainability transformation” and contributes to the further development of the concept of TLFCs. By exploring existing TLFCs in the GSA region, the report provides an overview of what these organizations look like in practice, the strategies they employ to promote sustainability and fairness and how they collaborate with other actors, particularly producers in other countries.

To this end, we first identified 262 TLFCs using publicly available information from websites and documented them systematically in a shared research framework. All 262 organizations were subsequently invited to take part in an **online survey conducted in June and July 2025** via LimeSurvey. Invitations were sent by email and followed up by phone calls to increase participation. In total, 63 organizations took part in the survey, and this report presents selected results based on their responses.

Most survey responses were provided by individuals in senior leadership roles within their organizations. Of 52 respondents, CEOs accounted for 36% of respondents, followed by (co-)founders (15%) and employees in various operational roles (17%). Other respondents were sustainability and marketing managers, members of executive or supervisory boards, and (co-)owners, each representing around 8% of respondents.

Participating TLFCs at a glance

For this study, TLFCs are understood as organizations involved in **food provision or commercialization** based in the GSA region and **operating across national borders**. A central aspect of these TLFCs is their **direct engagement with producers**: while almost 60% of surveyed organizations trade directly with farmers or farmer groups, about 40% alternate between direct purchasing and working through intermediaries (N=56).

Almost all participating TLFCs (98%) are active in marketing and distributing food products (Fig. 1). In addition, a large share (75%) carries out activities such as transportation and dispatch, storage, packaging, and processing or refining. However, between 17-38% of TLFCs fully outsource these activities to external partners. Only 25% of the surveyed TLFCs are directly involved in food production.

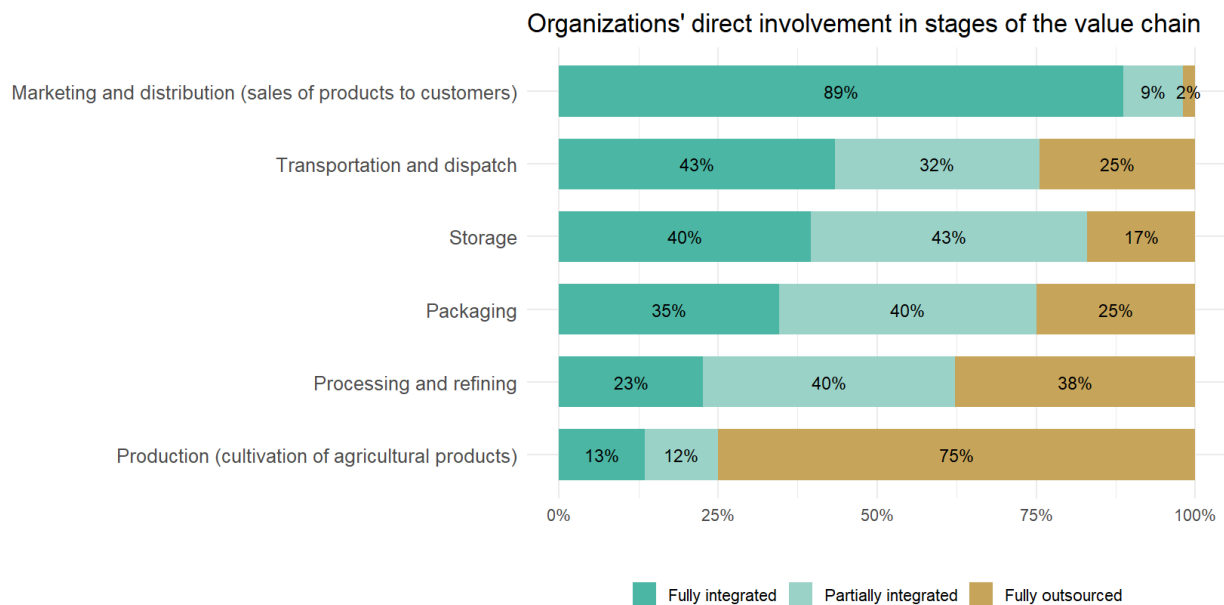


Figure 1: Involvement of TLFCs in different stages of the value chain. Respondents indicated the degree of integration into their organization for each of the displayed stages of the value chain (N=52-53; varies by item).

The participating **TLFCs vary widely in legal form, size, and financial structure**. About 17% operate as cooperatives or associations, while the majority (83%) are incorporated entities such as limited liability companies, joint-stock companies or sole proprietorships. Most TLFCs represented in the survey are relatively small: 72% employ fewer than ten full-time equivalents (FTEs), while 21% have between 10 and 100 FTEs. Only 7% employ more than 100 FTEs (total N=53). Annual net revenues also differ widely. 61% of the organizations report annual net revenues of up to 1 million EUR/CHF, 28% between 1 and 10 million, 9% between 10 and 100 million, and 2% exceed 100 million (total N=46).

The range of products traded by the surveyed TLFCs is also diverse. The **most common product categories** include coffee (43%), cacao and chocolate (38%), herbs and spices (29%), tea (25%), as well as nuts and seeds, and fruit and vegetables (each 19%)¹. Their **sourcing networks span multiple world regions**, with the highest shares of production located in South America (43%), Central America and the Caribbean (41%), East and Southern Africa (32%), Southern Europe (27%), South Asia (24%), and the GSA region itself (21%).

A strong social and environmental orientation (usually, next to an economic orientation) is another defining characteristic of TLFCs. The vast majority of participating TLFCs described themselves as mission-driven. Nearly all respondents (95%) reported pursuing at least one democratic purpose such as transparency, social justice, or fairness. Sustainability-related objectives—such as ecological production, health, or resilience²—were highlighted by 86% of the organizations.

¹ In some cases, multiple product categories are traded.

² Purposes were coded by the researchers based on mission/value statements published on the TLFCs' websites.

2. Results

2.1 Strategies and measures for sustainable, fair supply chains and food systems

Sustainability and democratic measures and strategies

Most of the TLFCs pursue sustainability and democratic measures and strategies (Fig. 2). Almost all TLFCs (93%) reported that measures guaranteeing healthy and high-quality products are fully or rather implemented. Transparency measures regarding the visibility of actors involved in the supply chain (81%) or product-related information on origin, prices, and production conditions are also frequently mentioned (83%).

A majority of the TLFCs stated that they purposefully collaborate with smallholder farmers and disadvantaged groups (73%, fully or rather applies) as well as with artisanal and traditional producers (81%). In these collaborations, many focus on sharing risks with producers (71%) and supporting the development of (agro)ecological production methods (81%). As part of their general direction, the majority of TLFCs (75%) pursue an economically viable strategy that considers all actors involved. Slightly less emphasis is put on measures that enable inclusive decision-making and participation of production partners (48%) or promote personal encounters between them and consumers (54%).



Figure 2: Sustainability and democratic measures and strategies implemented (N=62-63; varies by item).

Measures for fairness in supply chains

The promotion of fairness in supply chains is a key aspect of TLFCs and their engagement (Fig. 3). The survey results show how the TLFCs promote fairness in partnership with their producers. Most TLFCs (91%) stated that they fully or rather pursue measures to directly support smallholder structures and cooperatives in the producing countries. Much attention is also paid to measures that guarantee producers a living income (89%) and to those that eliminate exploitative child labour and forced labour (83%). In comparison, a smaller proportion of TLFCs (50%) have implemented measures to include or empower marginalized groups.

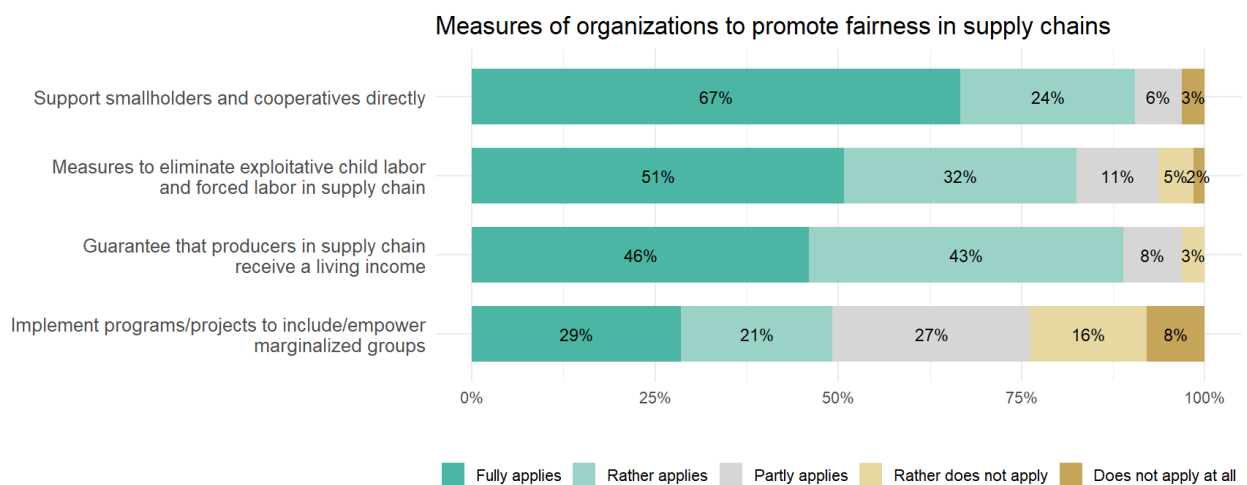


Figure 3: Measures for fairness in supply chains (N=63).

Measures for resilience of supply chains

A large share of the TLFCs reported to focus on enhancing the resilience of the supply chain but the prioritized measures vary (Fig. 4). The survey shows two commonly used measures: first, maintaining long-term partnerships with suppliers (97% in total, i.e. “fully applies” and “rather applies”), and second, generating transparency and traceability in the supply chain (87%). About half of the TLFCs reported relying on flexible pricing and long-term financial strategies (46%) as well as on the diversification of their suppliers (51%). On the contrary, only few TLFCs are considerably engaged in developing contingency plans (27%) or in investing in critical infrastructure and storage solutions (37%).



Figure 4: Measures for resilience of supply chains (N=62).

Strategies for food system change

Many of the TLFCs pursue food system change in their strategic orientation. Less than a quarter of them (22% strongly or very strongly agree) reported that their efforts are solely directed toward their core activities (Fig. 5). The most frequently mentioned strategy was to act as a role model (66%). To a somewhat lesser degree, TLFCs stated that expanding own activities (55%) and encouraging others to replicate their model (53%) are part of their core strategies for driving food system change. In contrast to that, a substantial lower number of TLFCs considered advocacy and policy work as a strong priority (16%).

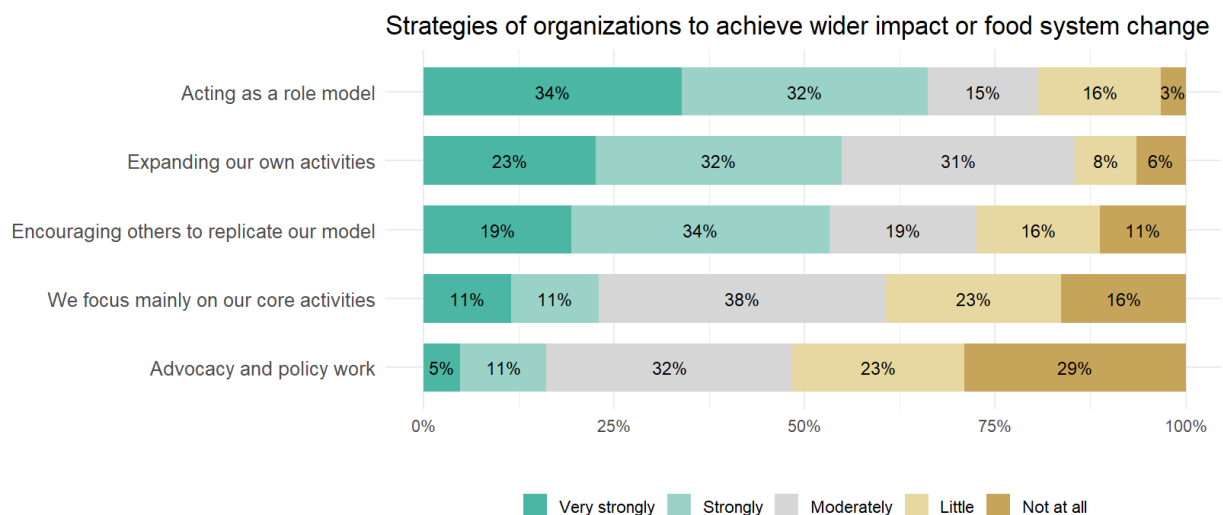


Figure 5: Strategies for food system change (N=61-62; varies by item).

2.2 Relationships and collaboration

Frequency and means of communication with production partners

Communication with production partners appears to happen quite densely (Fig. 6). Most TLFCs are in daily or weekly contact with their partners via email or messaging services such as WhatsApp (63%), and to a somewhat lesser extent via phone calls or online meetings using tools such as Zoom or Skype (36%). Additionally, nearly one third of TLFCs communicate with their production partners via phone or online calls on a monthly basis (30%).

Personal visits to production sites are common. For almost half of the TLFCs, these visits take place once a year (49%), while a smaller share visit their partners once every few years (25%). In contrast, visits by production partners to the core organizations are less frequent on an annual basis (32%), with an even larger share occurring only once every few years (39%). Notably, 25% of production partners have never visited their partners abroad.

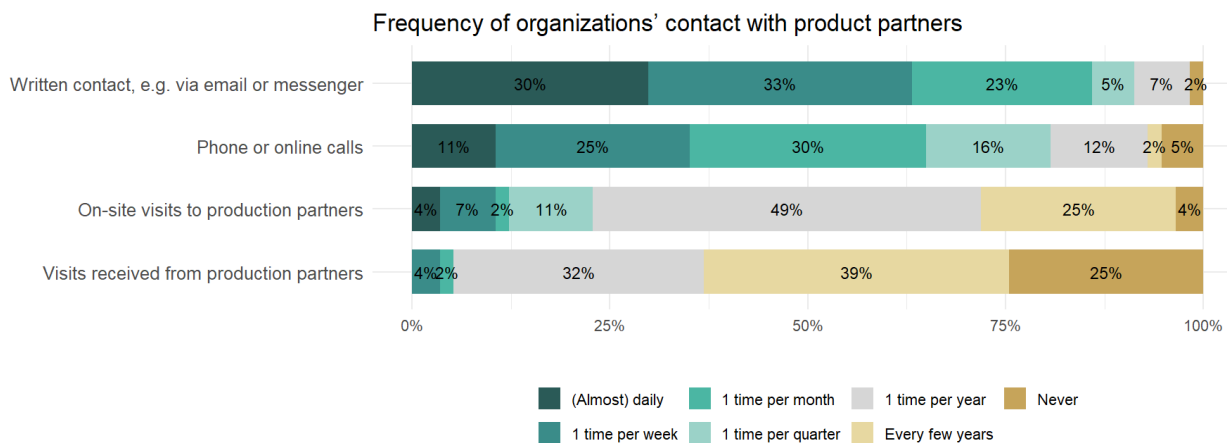


Figure 6: Average frequency of contact with production partners (N=57).

Production partners' involvement in shaping the value chain

Figure 7 shows that **production partners are fully or partially involved in a wide range of activities along the value chain**. While decisions on strategic goals remain largely within the authority of the core organization (45% do not involve production partners at all), production partners play a significant role in operational and developmental activities.

In particular, production partners are fully or partially involved in improving cultivation methods and/or harvesting techniques (86%). A majority also participates in strategies aimed at minimizing risks along the value chain (89%). Furthermore, production partners are involved in contract negotiations (86%), with the majority reporting full involvement (56%). High levels of involvement are also observed in the definition and development of quality or sustainability standards (85%), as well as in strategies to control these standards. To a similar extent, production partners contribute to the development of new products (79%).

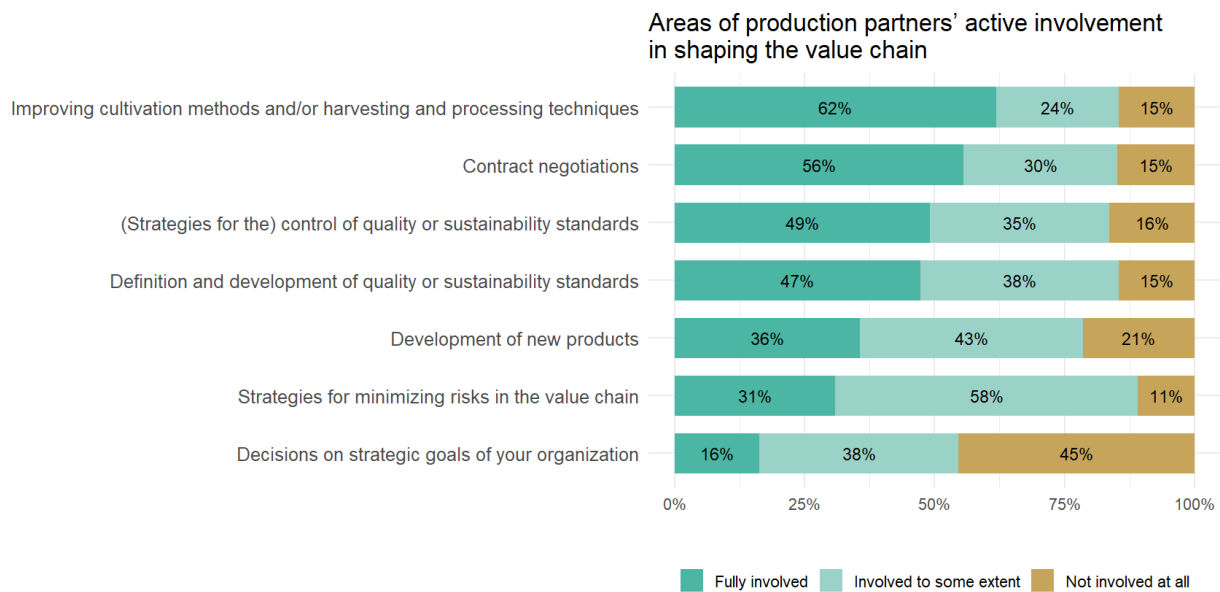


Figure 7: Production partners' involvement in shaping the value chain (N=54-56; varies by item).

Occasions and mechanisms of involvement of production partners

Although **partners are mainly involved in production**, Figure 8 shows that **their participation and involvement in the value chain also occurs through situation-specific occasions and mechanisms**. More than half of the TLFCs at least partly involve production partners in specific projects (74%) and have established feedback loops to incorporate partners' perspectives into decision-making processes (60%).

By contrast, for most TLFCs, other approaches that enable production partners to participate more systematically do (rather) not apply. This is true for participation in organizational decision-making (69%), broader programs or guidelines to support such participation (67%), or initiatives to strengthen production partners' political positions through interest groups in producer countries (60%).

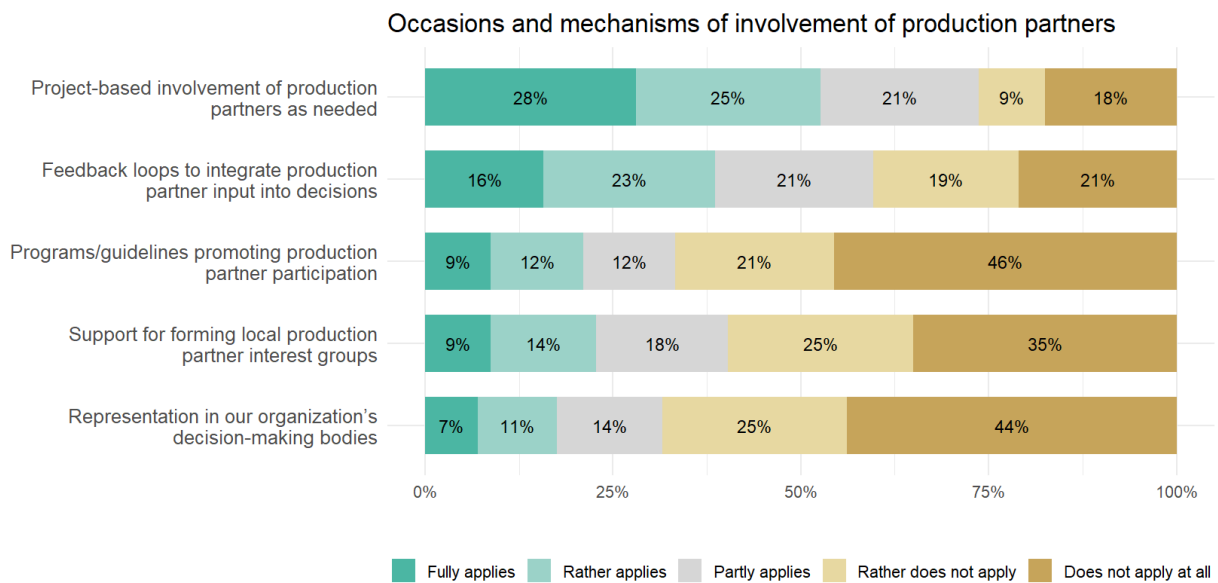


Figure 8: Occasions and mechanisms of involvement of production partners (N=57).

Price setting

Almost 90% of the organizations either negotiate prices collaboratively with their production partners (54%) or have prices determined directly by them (34%) (Fig. 9). By contrast, a small minority of core organizations set prices unilaterally (5%), determine them in consideration with their production partners (4%), or base them exclusively on market prices (4%). In addition, a few TLFCs reported other practices (not listed in Fig. 9) such as committing from the outset to pay prices that exceed prevailing market or reference levels by 10%-15%.

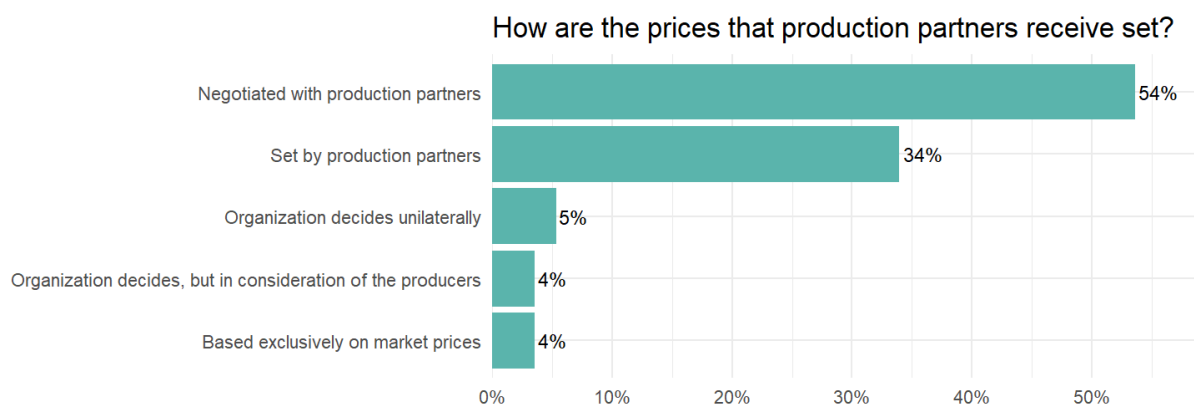


Figure 9: Price setting (N=53).

Facilitation of consumer-producer relationship

TLFCs engage in a variety of practices to facilitate closer relationships between consumers and production partners. Figure 10 illustrates that the vast majority of organizations (93%) strengthen this connection primarily by sharing stories about production partners or providing insights into their supply chains. Closely related, some organizations also use social media for this purpose (44%).

Another important means of fostering closer connections is the creation of transparency (82%), followed by offering behind-the-scenes insights into production processes or company decision-making (62%). In contrast, events that bring consumers and production partners together, such as farm visits or open days at production sites, are organized less frequently (32%).

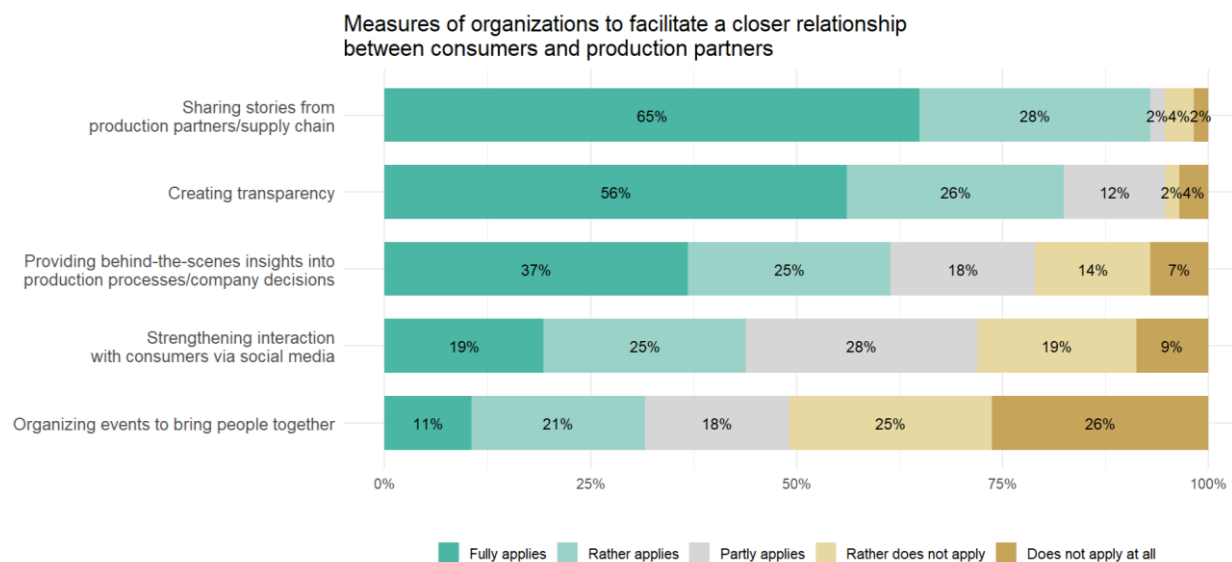


Figure 10: Facilitation of consumer-producer relationship (N=57).

2.3 Organizational performance and challenges

Developments in regulatory environment

The majority of organizations believe they could **benefit from public policies particularly from tax incentives for sustainability practices (73%)** and environmental taxes (52%), stronger sustainable public procurement (67%), stricter supply chain laws (54%) and measures to reduce food waste (55%). At the same time, a majority (69%) thinks that **changes in customs policies could negatively affect them** (Fig. 11).

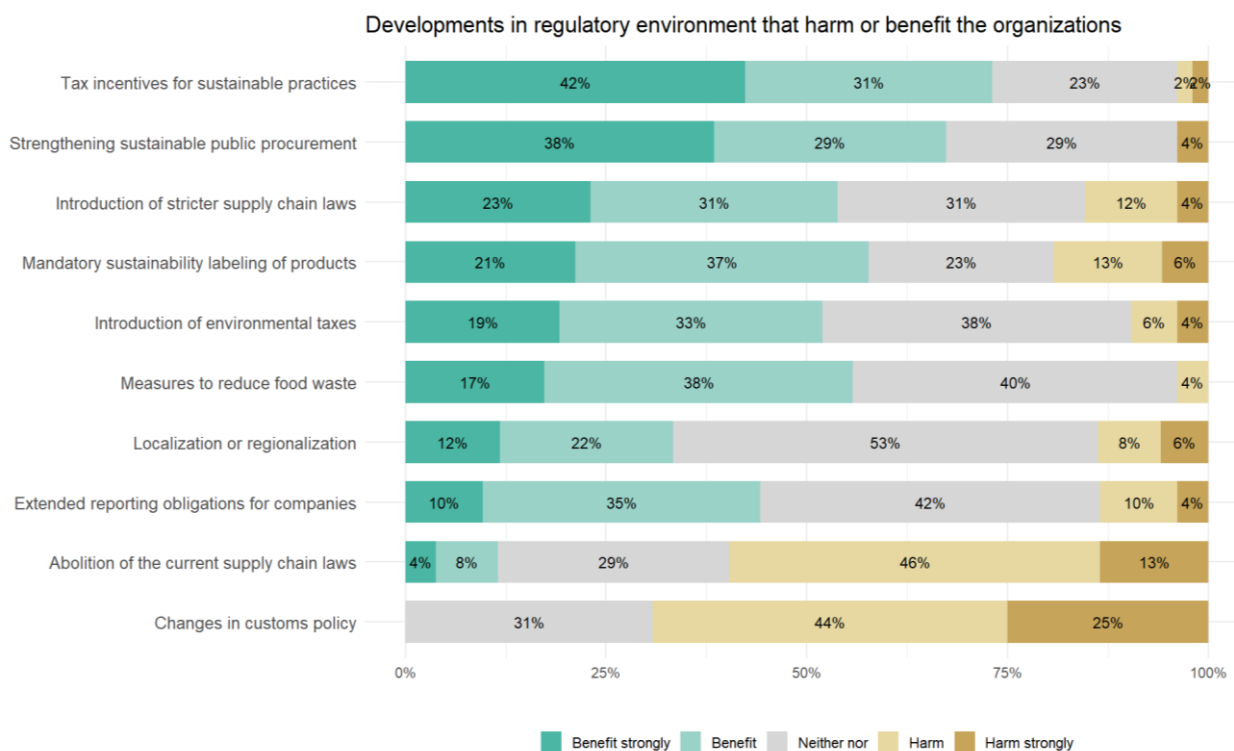


Figure 11: Developments in regulatory environment (N=51-52, varies by item).

Challenges for TLFCs

The majority of TLFCs (80%) consider limited resources as (somewhat) challenging. Environmental changes (77%), excessive bureaucracy (69%), pricing pressures (64%), and creating consumer understanding (59%) are also seen as major challenges. Balancing the interests of producers and consumers is considered less challenging, with 27% of organizations reporting it as (rather) not challenging (Fig. 12).



Figure 12: Challenges for the organizations (N=51-52; varies by item).

Biggest successes of the organization

The TLFCs emphasized various achievements as their biggest success³. Figure 13 shows that for some TLFCs, the biggest success was to **establish personal and trustworthy partnerships** (13 mentions). Economic success (9) and the continued existence of the organization (while adhering to core values) (9) was also considered were also highlighted. Others defined their biggest success through their generated environmental (6), economic (5) or social impact (4) in producing countries (6) such as forest preservation, higher income or improved wellbeing for farmers.

Biggest failures of the organization

Most of the failures mentioned in the survey are related to production and supply chain issues (9 mentions) including unexpected challenges such as pest infestations, insufficient supply, or missing processing capacities. Market and customer base issues were also frequently listed (9), with failures covering the loss of (price-sensitive) customers or failed product launches. Some TLFCs also reported failures related to the internal organization or their business model (6) (e.g., lacking success in terms of scaling), partnerships (6) (e.g. loss of many B2B partners) and financial challenges (6) (e.g. liquidity problems) (Fig. 14).

³ Respondents' answers to the open question about biggest successes and failures have been coded by the researchers and condensed into the categories displayed.

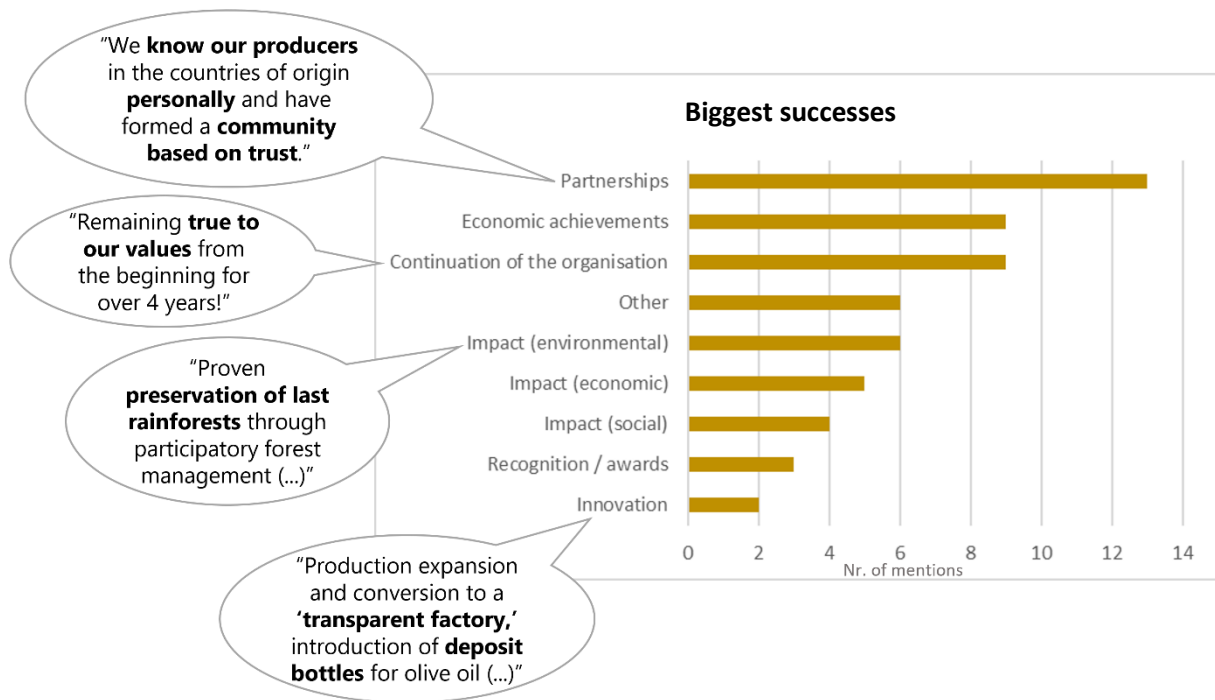


Figure 13: Biggest successes of the organizations (N=57).

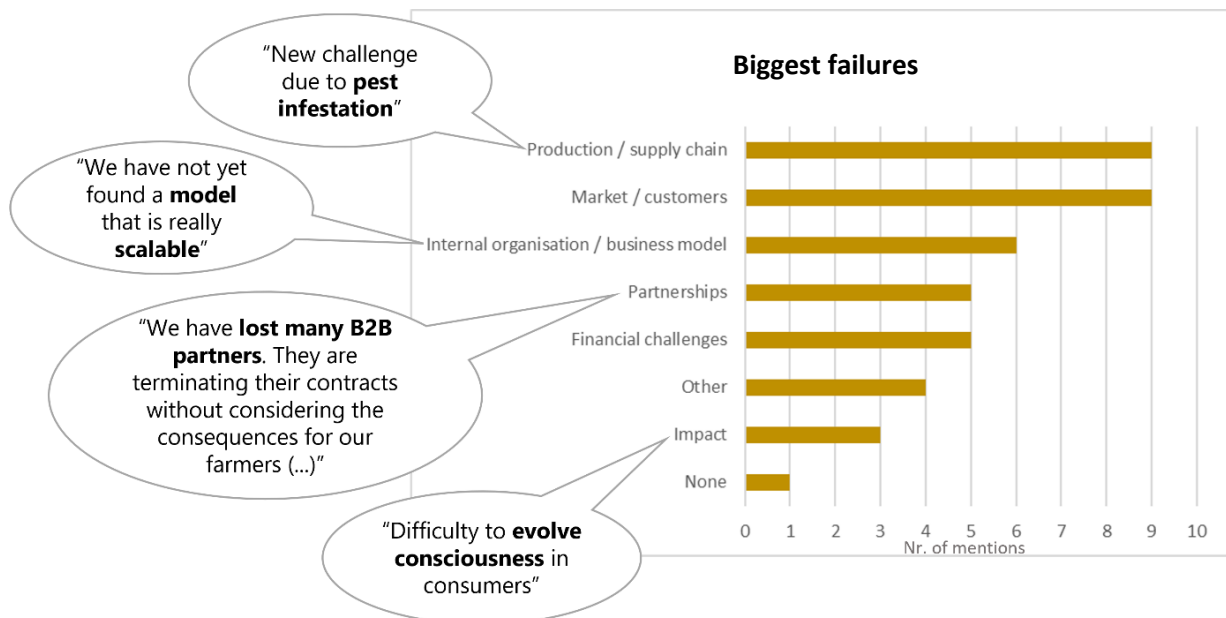


Figure 14: Biggest failures of the organizations (N=42).

3. Summary

The survey shows that Trans-Local Food Coalitions (TLFCs) in the Germany–Switzerland–Austria region are highly mission-driven organizations that combine economic activity with strong social and environmental goals. Most TLFCs focus on marketing and distributing food products across borders and work closely—often directly—with producers in multiple world regions, particularly in Latin America, Africa, Southern Europe, and South Asia.

TLFCs mainly promote sustainability, fairness, and resilience through **long-term partnerships, transparency, and trust-based relationships** with production partners. Fairness is most often addressed through direct collaboration with smallholder farmers and cooperatives, living-income approaches, and efforts to prevent exploitative labor practices. Resilience is largely built through stable relationships rather than through formal risk management tools such as diversification strategies, contingency planning, or infrastructure investments.

Production partners are in **frequent communication** with TLFCs and are most likely involved in operational activities or specific projects. However, strategic decision-making usually remains with the core organization, and deeper forms of shared governance are still limited. Prices are most commonly set through negotiation or determined by producers themselves, usually above market reference prices.

Most TLFCs aim to contribute to broader food system change primarily by **acting as role models, scaling their own activities, and inspiring others to replicate their approaches**, rather than through political advocacy. Connections between consumers and producers are mainly fostered through storytelling and information sharing, while direct encounters remain rarer.

Finally, TLFCs face significant challenges, especially **limited financial and material resources, administrative burdens, environmental pressures, and pricing constraints**. At the same time, many organizations view their biggest successes in the stability of their partnerships and their continued economic viability. Public policies—particularly those supporting sustainable practices and procurement—are widely seen as important levers to strengthen their work, while changes in customs regulations are perceived as a potential risk.