Data network for better European organic market information

The case studies of the Organic Data network

Susanne Padel, Catherine Gerrard and Anja Vieweger

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Introduction

✓ Testing/improving data collection procedures
✓ Publishing better market reports in six countries/regions
   • UK
   • Germany
   • Italy
   • France
   • Czech republic
   • Mediterranean

✓ Reporting on experience
   ✓ Cross country comparisons
   ✓ Advice for future
<table>
<thead>
<tr>
<th>Production</th>
<th>Domestic market/retail</th>
<th>International trade</th>
<th>Farm level Price</th>
<th>Retail prices</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>UK</strong></td>
<td>Producer survey</td>
<td>Control body data</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td><strong>DE</strong></td>
<td>Data sources</td>
<td>Task force</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td><strong>FR</strong></td>
<td>Other sales channel surveys</td>
<td>Other sales channel surveys</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td><strong>CZ</strong></td>
<td>Missing sectors (e.g. wine)</td>
<td>Sector –body approach Cross checking</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td><strong>IT</strong></td>
<td>FADN data for cross checking</td>
<td>Customs data International comparison</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td><strong>Mediter Region</strong></td>
<td>Production value</td>
<td>Integration of sources Cross-checking</td>
<td>NA</td>
<td>Harmonise and cross-check</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Combining sources</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| **UK**     | Control body data   | Control body data   | Control body data   | Control body data   |
| **DE**     | Task force          | Task force          | Task force          | Task force          |
| **FR**     | Sector –body approach Cross checking | Sector –body approach Cross checking | Sector –body approach Cross checking | Sector –body approach Cross checking |
| **CZ**     | FADN data for cross checking | FADN data for cross checking | FADN data for cross checking | FADN data for cross checking |
| **IT**     | Production value | Integration of sources | Integration of sources | Integration of sources |
| **Mediter Region** | Consolidation in several countries | Combining sources | Combining sources | Combining sources |

**International trade**
- Data sources: NA
- Other sales channel surveys: NA
- National project: NA
- Customs data: International comparison
- FADN: Harmonise and cross-check
- Integration of sources: NA
- Combining sources: NA
- Cross checks: NA

**Farm level Price**
- (producer survey): NA
- International comparison: NA
- FADN: Harmonise and cross-check
- Integration of sources: NA
- Combining sources: NA
- Cross checks: NA

**Retail prices**
- (collected): NA
- Publish non-current: NA
- Harmonise and cross-check: NA
- Integration of sources: NA
- Combining sources: NA
- Cross checks: NA
Production data

- CB data for crop & livestock data
- Common classification systems
- Different ways to estimate yield
  - Expert estimates
  - Trade body data (slaughterhouse, milk)
  - FADN data (consistent sample, size)
  - Producer surveys (also amounts sold as organic, farm prices, future intentions)
Retail data - multiples

- Product classifications not harmonised
- Panel data most commonly used
- Household *versus* point of sale
- Coverage < 100% of market *out of house consumption*
- Non-bar coded products
- Organic status of product lines
- Cross checking
Retail data – non multiples

✓ Remain problematic – not one approach for all sales channels

✓ Approaches used
  ✓ Survey of members of umbrella organisation (e.g. of farmers’ markets and farm shops)
  ✓ Collaboration with trade/sector bodies
  ✓ Specialist panels

✓ Publication may improve future response rates
Overall market estimate

✓ Combining a number of data sources in a piecemeal or “jigsaw puzzle”
✓ Cross checking
✓ Collaboration
✓ Third part brokerage between competitors
## Farm level price data

<table>
<thead>
<tr>
<th>Products</th>
<th>Level of processing/packaging</th>
<th>Transport costs</th>
<th>VAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>DE: AMI</td>
<td>All, Sorted and cleaned but not packed</td>
<td>Carriage free processor</td>
<td>excluded</td>
</tr>
<tr>
<td>UK: Soil Association</td>
<td>All, unknown</td>
<td>Farm-gate</td>
<td>excluded</td>
</tr>
<tr>
<td>FR: RNM</td>
<td>Fruit, vegetables, potatoes, Retail and wholesale stage for non-processed fruits &amp; Vegetables</td>
<td>Carriage free processor</td>
<td>VAT excluded</td>
</tr>
<tr>
<td>FR: La Depeche</td>
<td>Cereals, protein crops, oil seeds, Loose, and cleaned</td>
<td>Carriage free processor</td>
<td>excluded</td>
</tr>
<tr>
<td>IT: ISMEA</td>
<td>All, loose and packed Depending on products</td>
<td>Carriage free processor</td>
<td>excluded</td>
</tr>
<tr>
<td>IT: Stock Exchanges Milano and Bologna</td>
<td>Cereals, protein crops, Loose, in bulk</td>
<td>Ex exchange</td>
<td>excluded</td>
</tr>
<tr>
<td>NL: Stock Exchange Emmeloord</td>
<td>Onions, Carrots, Onions raw, Carrots packed in parings</td>
<td>Ex exchange</td>
<td>excluded</td>
</tr>
<tr>
<td>DK: Friland</td>
<td>Pigs and Beef</td>
<td>Ex Slaughterhouse</td>
<td>excluded</td>
</tr>
</tbody>
</table>
Comparing farm level prices (DE)

- Different publishing dates and frequencies
- Different product categories
- Inclusion or exclusion of VAT (and the rate of VAT where it is included)
- Whether prices are “farm-gate” or include transport/delivery costs
For example import data Italy

**Import authorization:**
- not equivalence regime

**Self-declaration**
- equivalence/not equivalence regime

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**potential volume**
- authorized to be imported, by organic products

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**exact volume**
- imported by organic products

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**Final database on import**

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**2nd step**
- consistency check

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**Additional info in SAD Box 44**
<table>
<thead>
<tr>
<th>Methods (example)</th>
<th>Trade type</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign trade statistics (DE, DK)</td>
<td>All foreign</td>
<td>Published Data in DK</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No common organic identifier</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Box 44 used</td>
</tr>
<tr>
<td>Self –declaration (IT)</td>
<td>Import from compliant countries/ non-compliant countries</td>
<td>So far only one country</td>
</tr>
<tr>
<td>Surveys (various)</td>
<td>All foreign trade</td>
<td>Sampling, response rate</td>
</tr>
<tr>
<td>Panel data (DE)</td>
<td>All foreign trade</td>
<td>If country of origin declared</td>
</tr>
<tr>
<td>Organic import authorisation from customs declarations (DE, FR, CZ, IT)</td>
<td>Import from non-compliant countries</td>
<td>Collaboration from customs authorities essential</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No accurate prediction of volume/value</td>
</tr>
</tbody>
</table>
Supply chain balances attempted

✓ Used in agricultural statistics

✓ Basic equation: \(\text{organic production} + \text{organic imports} - \text{organic exports} = \text{organic produce brought to the market}\)

✓ Biggest problem is data gaps

✓ Easier for products eaten mainly raw (e.g. carrots) than for processed products

✓ Further work in Organic Data Network
Making changes for improved quality

✓ Direct exchange of experience
  ✓ Those directly involved in producing market reports
  ✓ With researchers at workshops
✓ Six publications (some later this year)
✓ Continued and increased use of international classification systems
✓ Much more cross-checking
✓ More awareness of sampling and coverage
✓ Slowly filling some data gaps
Conclusions

✓ “Many cooks spoil the broth”
  ✓ Many different organisations
  ✓ But of none has main task to collect organic market data

✓ Collaboration and data sharing likely to increase quality and prevent over-sampling of organic operators
  ✓ Tension between market transparency and the need to protect commercially sensitive data
  ✓ More active involvement of sector/trade organisations

✓ At national level aim for coherent and durable cross collection platforms

✓ Exchanging ideas and sharing experiences across borders can improve the data collection system and data quality