The case studies of the Organic Data network

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Introduction

✔ Testing/improving data collection procedures
✔ Publishing better market reports in six countries/regions

- UK (ORC/SA)
- France (AgenceBio/FIBL)
- Germany (AMI/UKNA)
- Czech Republic (CULS/external)
- Italy (UPM/IAMB/external)
- Mediterranean (IAMB/ MOAN-Partners, IMO-TR)
<table>
<thead>
<tr>
<th>Production (volume and value)</th>
<th>UK</th>
<th>DE</th>
<th>FR</th>
<th>CZ</th>
<th>IT</th>
<th>MOAN</th>
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<td>Timeliness Producer survey</td>
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<td>MOAN Data harmonisation to provide volume and value estimate</td>
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<td>Missing sectors (e.g. wine)</td>
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<td>MOAN Cross checking two data sets</td>
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<td>Panel data sources Other sales channel surveys</td>
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<td>International trade</td>
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<td>MOAN Combining sources to estimate exports Cross checks</td>
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<td>Experience from national project</td>
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<td>Explore use of customs data</td>
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<td>MOAN Cross checks</td>
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<td>International comparison of prices</td>
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<td>[Cross check prices between two countries]</td>
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Production data (area, volume, value)

✔ CB data for crop & livestock data
  ✔ Common classification systems (Eurostat) may need expanding

✔ Combination of approaches 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)
Domestic Retail: Sales channels (2011)

United Kingdom

Germany

France

Czech Republic

Italy

General retailers | Organic retailers | Direct sales | Other channels

0% 20% 40% 60% 80% 100%
Domestic retail data - multiples

- 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
- Product classifications not harmonised between data providers
- Cross-checking with other sources
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 for organic shops in France and Germany
Estimating domestic retail market

✓ No single data source covers the whole organic market

✓ Different data sources combined in a piecemeal or “jigsaw puzzle”

✓ Cross checking
  ✓ Sector experts, Control body data
  ✓ Production data

✓ Collaboration

✓ Third part brokerage between competitors
## Farm-level price comparison: Germany

<table>
<thead>
<tr>
<th>Data provider</th>
<th>Product</th>
<th>Level of processing/packaging</th>
<th>Transport costs</th>
<th>VAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>DE AMI</td>
<td>All</td>
<td>Sorted and cleaned but not packed</td>
<td>Carriage free processor</td>
<td>Excluded</td>
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<tr>
<td>UK Soil Association</td>
<td>All</td>
<td>unknown</td>
<td>Farm-gate</td>
<td>Excluded</td>
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<tr>
<td>FR RNM</td>
<td>Fruit, vegetables, potatoes (non-processed)</td>
<td>Retail</td>
<td>Carriage free processor</td>
<td>included</td>
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<td></td>
<td></td>
<td>Wholesale</td>
<td></td>
<td>Excluded</td>
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<td>La Depeche</td>
<td>Cereals, protein crops, oil seeds</td>
<td>Loose, and cleaned</td>
<td>Carriage free processor</td>
<td>Excluded</td>
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<tr>
<td>IT ISMEA</td>
<td>All</td>
<td>loose and packed Depending on products</td>
<td>Carriage free processor</td>
<td>Excluded</td>
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<tr>
<td>Stock Exchanges Bologna</td>
<td>Cereals, protein crops</td>
<td>Loose, in bulk</td>
<td>Ex exchange</td>
<td>Excluded</td>
</tr>
<tr>
<td>NL Stock Exchange Emmeloord</td>
<td>Onions, Carrots</td>
<td>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>Animal carcases</td>
<td>Ex Slaughterhouse</td>
<td>Excluded</td>
</tr>
</tbody>
</table>
Price data collection issues and questions

- Different publishing dates and frequencies
- Different product categorisation
- Data collection level
  - Farm-gate, whole sale, retail,
- Farm data
  - Commodity raw material or packed/processed
  - Transport/delivery costs included
- Retail data
  - Inclusion or exclusion of VAT (VAT rate)
Third country import data: e.g. Italy

Import authorization: not equivalence regime

potential volume authorized to be imported, by organic products

Self-declaration equivalence/not equivalence regime

exact volume imported by organic products

1st step consistency check

Ministerial dataset on import

2nd step consistency check

Final database on import

Data from customs:

Equivalence / not equivalence regime

exact volume imported by organic products.

Additional info in SAD Box 44
## Different data sources for import data

<table>
<thead>
<tr>
<th>Methods (example)</th>
<th>Trade type</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimating volume using important authorisations (DE, CZ)</td>
<td>Import data countries not on third country list (no longer relevant)</td>
<td>No accurate prediction of volume/value</td>
</tr>
<tr>
<td>Customs declarations (FR, IT)</td>
<td>Import from third country list</td>
<td>Collaboration from customs authorities essential Box 44 used in some countries</td>
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<tr>
<td>Self –declaration (IT)</td>
<td>Import from all third countries</td>
<td>So far only one country</td>
</tr>
<tr>
<td>Surveys (DE)</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>
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<tr>
<td>Foreign trade statistics (DE, DK, FR)</td>
<td>All foreign trade</td>
<td>Only published in DK No common organic identifier in general</td>
</tr>
</tbody>
</table>
Publication of six market reports
Making changes for improved quality

✓ Direct exchange of experience between various bodies involved directly or indirectly
✓ Greater awareness of quality issues
  ✓ Using international classification systems
  ✓ Importance of sampling and coverage
  ✓ Data checks and cross-checking
✓ Awareness of the need for doing more
✓ Slowly filling some data gaps
Conclusions

✓ Many different organisations are involved in data collection
  ✓ Who has overall responsibility for collecting 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
✓ Coherent and durable national platforms
✓ Need for cross borders exchange to improve the data collection system and data quality
Acknowledgements

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Thank you!

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