



Data network for better European organic market information

# How to improve market data quality?

Case study on improved data collection methods in Germany

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# Current status market data collection

## ✓ Production data

- ✓ Land use and number of animals data is collected by AMI among most of the CB (10 to 11 of 14 ) since 1999
- ✓ 2012 the federal statistical office the first time collected land use and production data of fruit and vegetables, also area data for arable crops
- ✓ Milk delivery and number of laying hens collected by the federal agency for agriculture

## ✓ Domestic trade/market data

- ✓ Domestic market value estimated annually by a task force of panel institutions, scientists and AMI



# Data gaps and issues

- ✓ Data on **animal production** for meat (pigs, cattle, poultry) is not detailed enough for estimating for example the need of forage
- ✓ Time delay in publication of **production data** (voluntary reporting) limits usefulness to stakeholders.
- ✓ Limited data on **retail sales** through non-multiple sales channels such as bakeries, butchers, box schemes, farm shops, and farmers' markets.
- ✓ Sales values for all sales channels are reported by a household panel (GfK) with an uncertain coverage gap that makes market estimations very hard
- ✓ There is nearly no data on **catering** sales.
- ✓ Very limited (if any) data on **exports** from the Germany.



# Areas of improvement: DE case study

The AMI aims to:

- ✓ Improve the annual survey among the CBs by making this survey compulsory for the CBs (coverage 100 %)
- ✓ Improve the **annual market estimation** among the panel institutions and scientists
  - ✓ the 2013 estimation again has shown the uncertainties especially for all non-multiple channels
- ✓ Improve data collection to obtain greater **coverage** of sales through non-multiple channels (bakeries, butchers, box schemes, farmers' markets, farm shops).
- ✓ Compare **producer price** data with other European countries



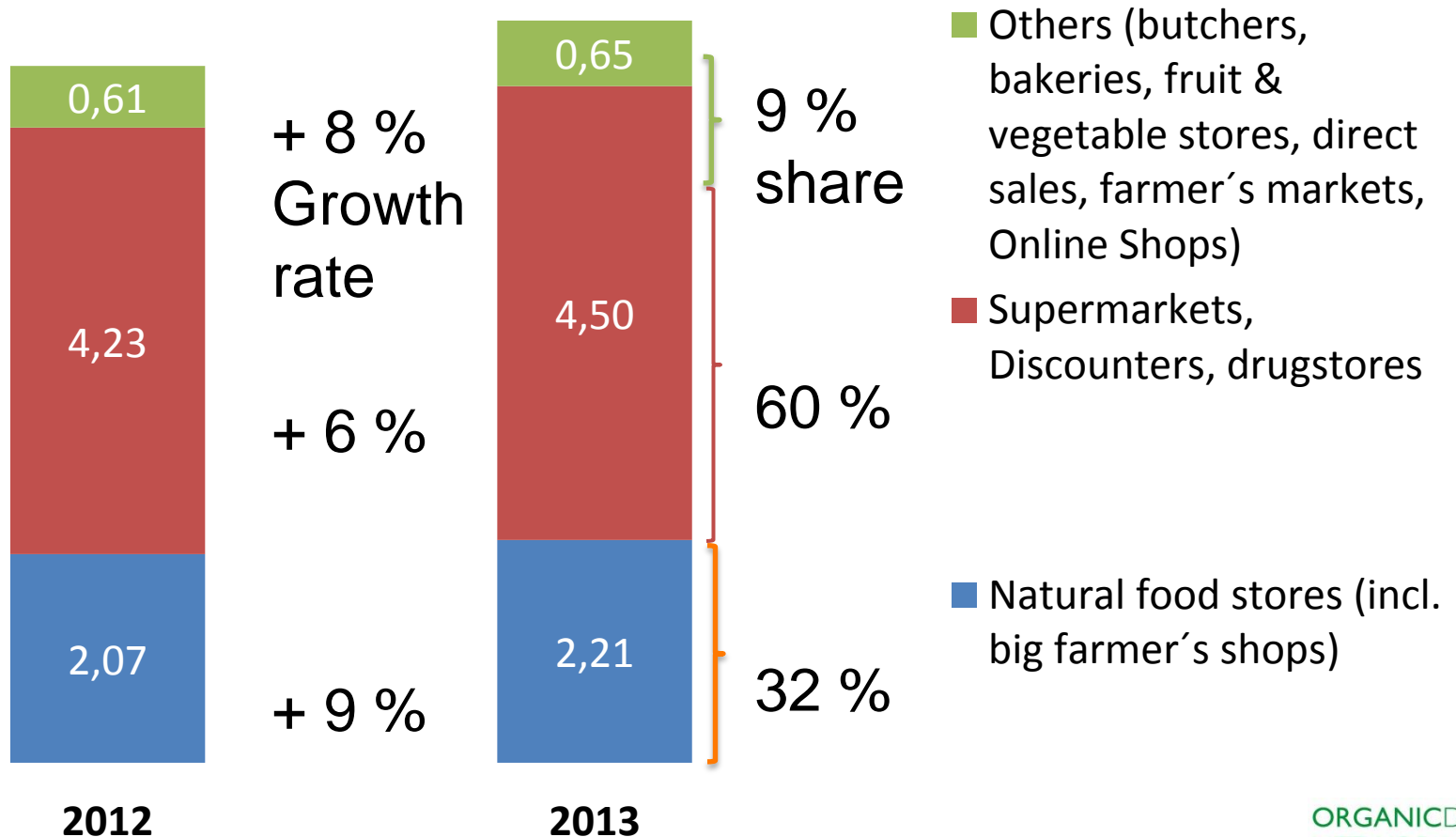
# First results – Market estimation 2013

- ✓ Carried out in January 2014 – in a puzzle of
  - ✓ household panel data (GfK),
  - ✓ trade panel data (Nielsen),
  - ✓ Natural food stores panels (BioVista and Klaus Braun)
- ✓ German market 2013 grew by 7 % up to 7.55 billion EUR
  - ✓ 60 % multiples, 32 % natural food stores, 9 % others



# German organic market grew by 7 %

**7.04 billion EUR      7.55 billion EUR**



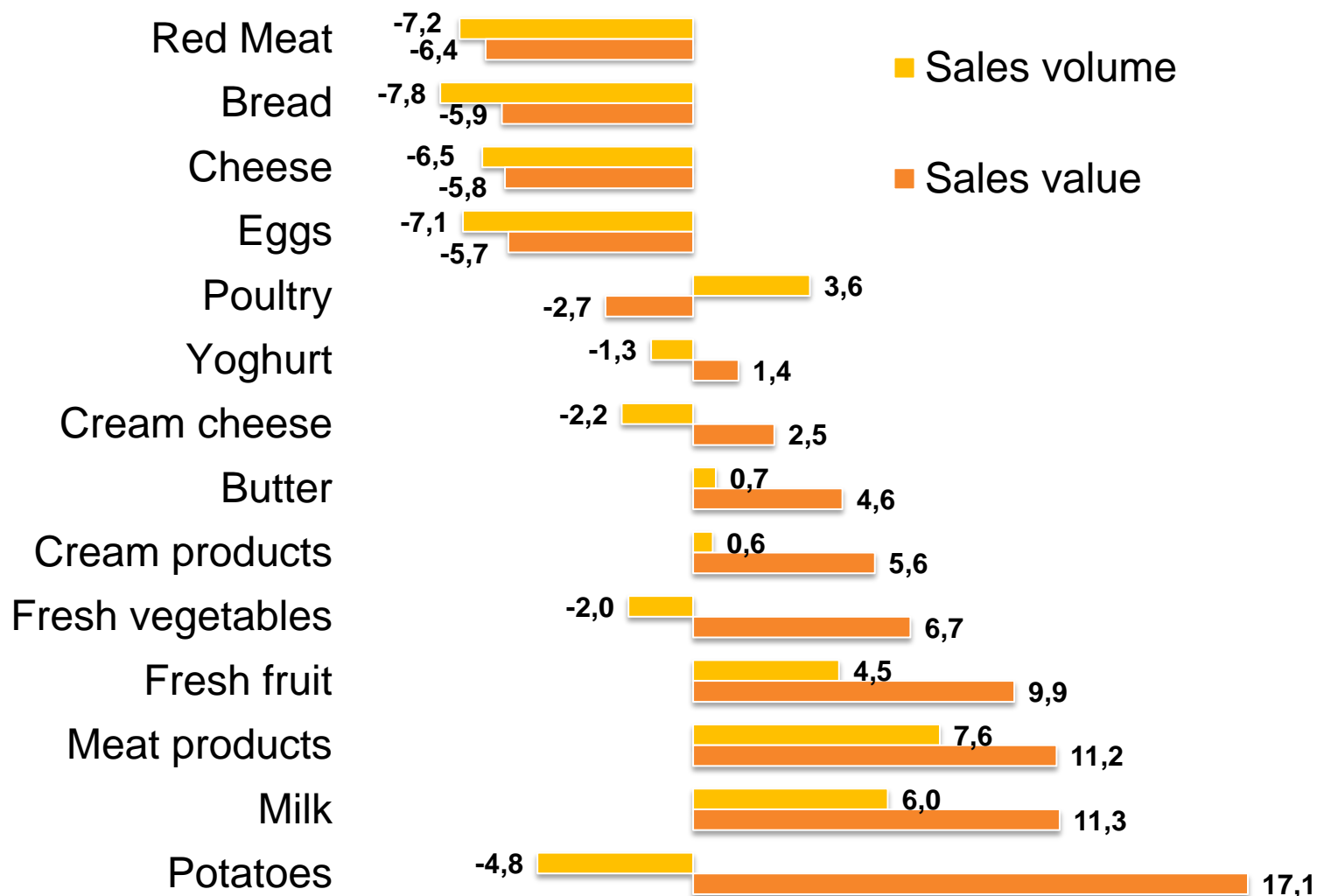
**2012**

**2013**

Source: Arbeitskreis Biomarkt based on GfK, Nielsen, BioVista and Klaus Braun



# Sales values and volumes changes 2013 in %



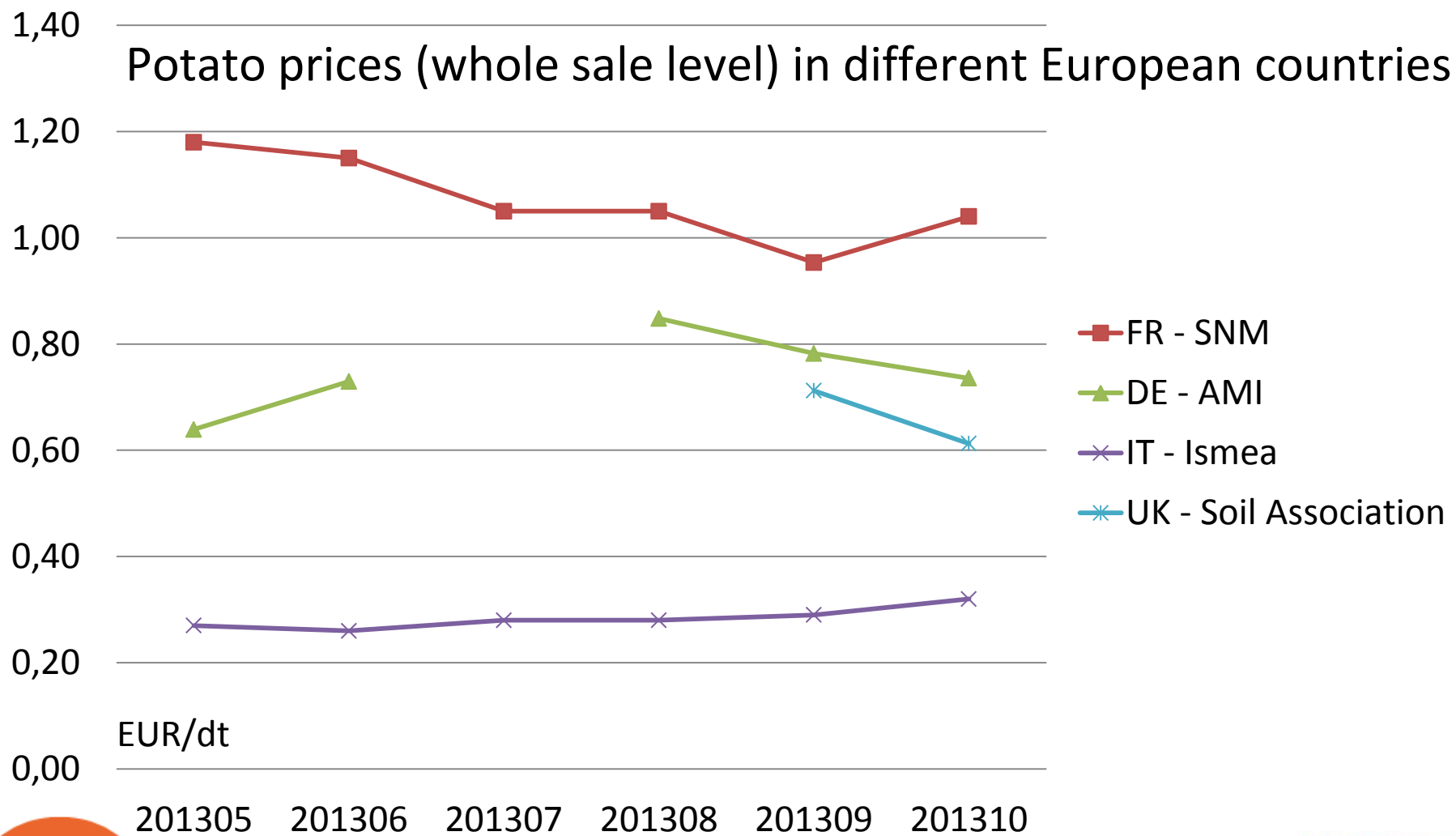
# Price comparison

- ✓ AMI started price data selection with selected vegetables and fruit, cereals, milk, eggs, meat
- ✓ From different data sources
  - ✓ La Depeche, SNM (FR), AMI (DE), Friland (DK), Borsa Bologna, Borsa Milano, Ismea (IT), Emmeloord Veiling (NL), Soil Association (UK)
  - ✓ Validation, quality check together with Ancona University
  - ✓ Probably AMI launches an organic price report in 2014





# Producer Price comparison - example



# Progress of work

- ✓ 2014 AMI Market report will be published in March 2014
- ✓ New European price report could be started
- ✓ AMI and Uni Kassel try to find fundings for a project determining the coverage gap for GfK household panel data for retail sales and other sales channels

