ORGANICDATA NETWORK

Data network for better European organic market information

The case studies of the Organic Data network

Susanne Padel, Catherine Gerrard and Anja Vieweger

ORGANIC RESEARCH CENTRE ELM FARM

Introduction

- ✓ Testing/improving data collection procedures
- ✓ Publishing better market reports in six countries/regions
  - UK
  - France
  - Germany
  - Czech republic
  - Italy
  - Mediterranean
- ✓ Reporting on experience
  - ✓ Cross country comparisons
  - ✓ Advice for future

ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK

	UK	DE	FR	CZ	IT	MOAN
Production	Timeliness Producer survey		Missing sectors (e.g. wine)	FADN data for cross checking	Production value	Consolidate countries
Domestic market/retail	Panel data sources Other sales channel surveys	Task force Other sales channel surveys	Sector –body approach Cross checking		Cross checking two main data sets	
International trade		Experience from national project	Customs data International comparison	Explore use of customs data	Integration and cross-checking of sources	Combining sources to estimate exports Cross checks
Price		International comparison of farm level prices		Analyse and publish non-current retail price data		

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)

ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK

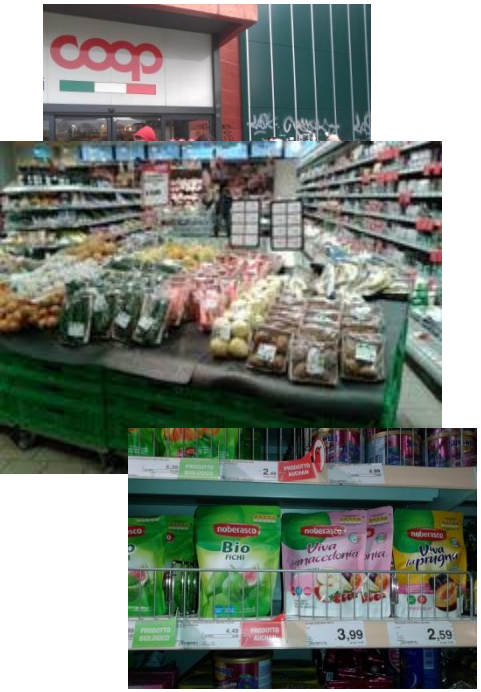
Estimating domestic retail market

- ✓ No data sources covers the whole organic market
- ✓ Different data sources combined in a piecemeal or “jigsaw puzzle”
- ✓ Cross checking
- ✓ Collaboration
- ✓ Third part brokerage between competitors

ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK

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

ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK

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

ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK

Farm-level price comparison: Germany

	Data provider	Product	Level of processing/ packaging	Transport costs	VAT
DE	AMI	All	Sorted and cleaned but not packed	Carriage free processor	Excluded
UK	Soil Association	All	unknown	Farm-gate	Excluded
FR	RNM	Fruit, vegetables, potatoes (non-processed)	Retail	Carriage free processor	included
			Wholesale		Excluded
	La Depeche	Cereals, protein crops, oil seeds	Loose, and cleaned	Carriage free processor	Excluded
IT	ISMEA	All	loose and packed Depending on products	Carriage free processor	Excluded
	Stock Exchanges Bologna	Cereals, protein crops	Loose, in bulk	Ex exchange	Excluded
NL	Stock Exchange Emmeloord	Onions, Carrots	Onions raw, Carrots packed in parings	Ex exchange	Excluded
DK	Friland	Pigs and Beef	Animal carcases	Ex Slaughterhouse	Excluded

ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK

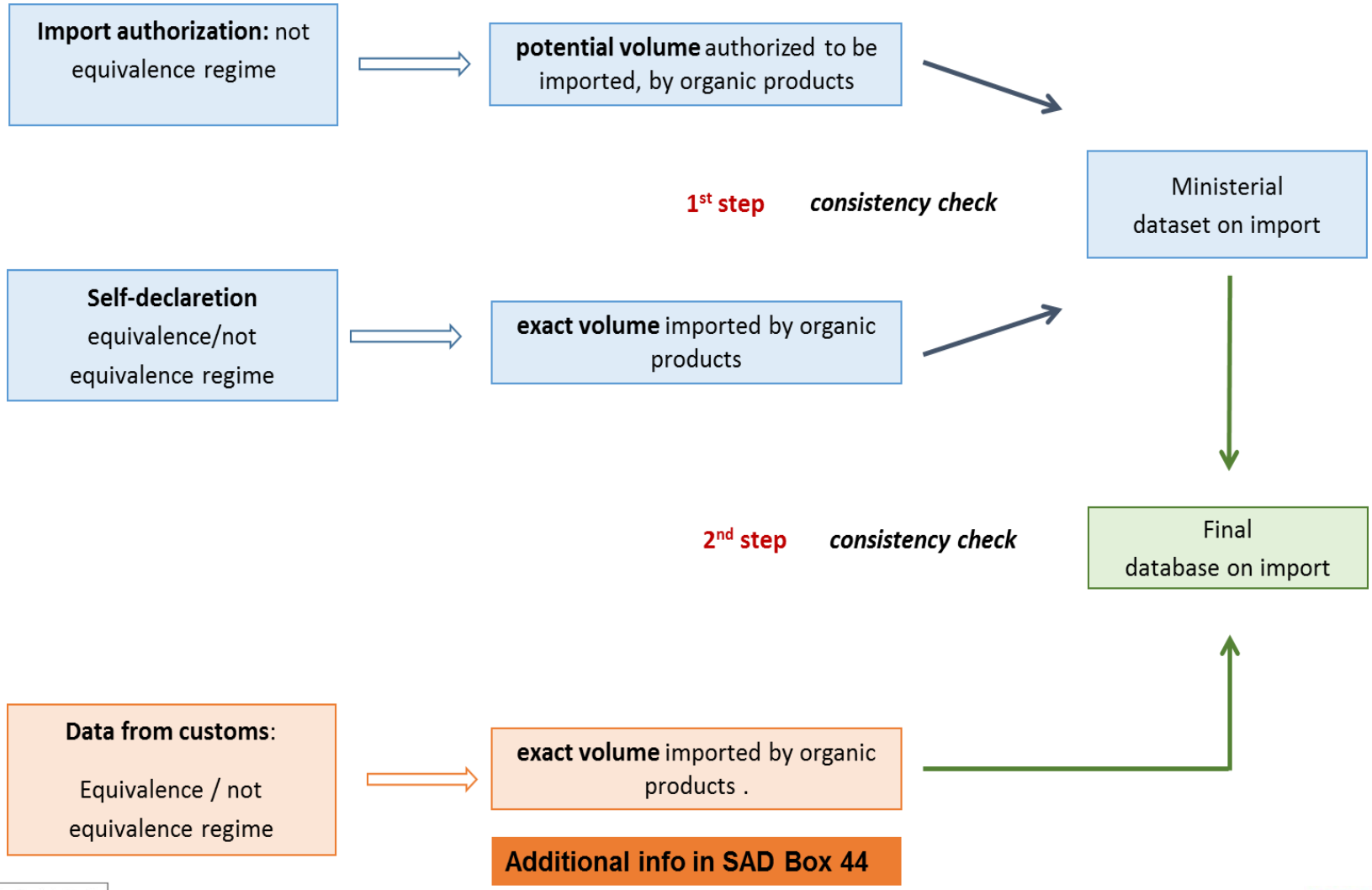
Comparing farm level prices

- ✓ 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

ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK

Import data: Italy



ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK

Different import data sources

Methods (example)	Trade type	Comments
Estimating volume using important authorisations (DE. CZ)	Import from non-compliant countries	No accurate prediction of volume/value
Customs declarations (FR, IT)	Import from non-compliant countries	Collaboration from customs authorities essential
Self –declaration (IT)	Import from compliant countries/ non-compliant countries	So far only one country
Surveys (DE)	All foreign trade	Sampling, response rate
Panel data (DE)	All foreign trade	If country of origin declared
Foreign trade statistics (DE, DK)	All foreign	Published Data in DK No common organic identifier Box 44 used

ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK

Making changes for improved quality

- ✓ Direct exchange of experience between various bodies involved directly or indirectly
- ✓ Six market report publications
- ✓ Greater awareness of
  - ✓ Need for doing more
  - ✓ International classification systems
  - ✓ Importance of sampling and coverage
- ✓ Data checks and cross-checking
- ✓ Slowly filling some data gaps

ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK

Conclusions

- ✓ *"Many cooks spoil the broth"*
  - ✓ Many different organisations are involved in data collection
  - ✓ Which body has it as a 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 arrangements/ platforms
- ✓ Exchanging ideas and sharing experiences across borders can improve the data collection system and data quality

ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK

Acknowledgements

- ✓ Thanks to the teams
- ✓ in Czech Republic, France, Germany, Italy, MOAN and UK

Co-funded by the European Union

FP 7 Grant agreement 289376

Thanks for listening

Any questions?

ORGANIC RESEARCH CENTRE ELM FARM

ORGANICDATA NETWORK