

## Results of surveys of organic market data collectors and end users in Europe

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### Abstract

*Despite the continuous growth of the organic market in Europe, in most countries only very basic statistics exist. Data and market information are needed by private and public actors to make correct decisions. To assist in improving data quality and availability, it is first necessary to be aware of who collects, analyses, and/or disseminates such data and their methods. It is also necessary to identify the needs and demands of end users of organic market data, and to find areas of information asymmetry. The results of two surveys carried out in Europe: one of data collectors and one of end-users are presented. The results have shown that recent claims regarding a lack of organic market data are justified. There was an almost universal expression by end users of feeling at a competitive disadvantage because of lack of available data. This is problematic, as without good quality information it is difficult for stakeholders to make decisions about the risks and benefits of investment.*

### Introduction

Despite the growth of the organic market in Europe, in most countries only basic statistics exist. Individual country governments collect data which are published by EUROSTAT (the statistical office of the European Union), on the number of certified holdings, land areas and livestock numbers. Market statistics such as the amount of production, consumption, retail sales, international trade and prices are lacking in most countries. Lampkin and Rippin (2005) have given a number of reasons for the need for reliable data. Data and market information are needed by members of the organic supply-chain to make investment decisions, and by policy makers to calibrate measures targeted to the sector. To understand the availability of data, it is necessary to be aware of the organisations that collect, analyse and/or disseminate them and the methods that they use. It is also necessary to identify the needs and demands of end users of organic market data, and to find areas of information asymmetry.

### Material and methods

Two separate surveys were carried out (Gerrard et al. 2012; Home et al. 2013). To assess the current status of organic market data collection in the EU and its neighbours, an online survey was developed and nearly 600 organisations within the EU27, EFTA, the rest of Europe and the Mediterranean were invited to participate. The useable response rate was 28%: based on 112 useable responses from organisations within the EU, EFTA (Norway, Switzerland, Iceland and Liechtenstein), the rest of Europe and the Mediterranean (MOAN); 51 e-mails explaining that such data were not collected by the respective organisation; and removal of insufficiently complete responses from the sample.

To assess the needs of end users, a survey was undertaken to evaluate the quality of the existing available data that is used. In an online questionnaire, 390 people from 36 European countries were surveyed. Most of the responses (40%) came from France, Germany, Italy, the Netherlands, Spain and the UK, which are all countries with a more developed organic market corresponding with a higher number of organic operators and thus a higher number of potential end users of organic data.

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## Results

### Respondents

The majority of the organisations who responded to the data collectors' survey are government bodies (29%), followed by control/certification bodies (20%). Of the 23% who selected 'other', some of the organisation types included: private and state research institutes, not for profit organisations, non-governmental organisations and advisory services.

Of the respondents to the end users survey, 39% worked for organic producers, 29% for distributors of organic produce/products, and 22% for processors of organic products. 46% of the respondents were engaged in executive/management, 27% in sales, and 22% in marketing. The regions described by the data that are used are primarily national data (62%), and also to a large extent regional data (41%). Approximately 32% of the respondents use international European data or whole of Europe data, while 20% of the respondents use data from non-European countries or data on world level respectively.

The data collectors reported that the collected data are generally used for statistics (32%) and market information (19%). When comparing different groups of European countries, the results for 'EU15' (e.g. the older EU states such as the UK) show a slightly higher proportion using the data for market information (26%) compared with 'newer EU states' (14%); and a lower proportion using the data for the purposes of subsidies/governmental support programmes (4%) in the 'EU15' group than in the 'newer EU states' (14%). End users of organic market data reported that the primary uses for organic market data are marketing strategy formulation (41%), decision support (39%), strategy/policy development (34%), research (26%), and forecasting (23%) (note: these total more than 100 percent as each respondent was allowed to indicate more than one use).

### Data quality

Data collection methods vary with the type of data collected, but surveys are a commonly used method across data types. Censuses are often used to collect production volume data and other types of data such as international trade data (they are not used to collect data in non-European countries). Expert estimates are occasionally used across most of the country categories. For retail data and consumer price data, consumer/household panels or retail panels (scanner data) are likely to be used, whereas catering sales data are collected by surveys. Import and export data are generally collected using surveys and sometimes censuses but some reliance is also placed on expert estimates. The data analysis carried out in the different countries (across all of the categories) tends to be compilation or basic analysis (such as averages, and ranges). Other methods mentioned include time-evolution, comparison to averages or totals, and sense-checking with other data (particularly for export data).

The data types that are most commonly collected are production data, especially land area, followed by production volume; whereas production value is much less commonly collected. Price data and retail sales data are the next most commonly collected market data. Export data are more commonly collected in non-European countries than in the EU, perhaps reflecting a higher importance to their economies. The product categories most often represented in EU27+EFTA market data collection are meat, milk and dairy products, fruit and vegetables. Across the other groups of countries (e.g. other European, non-European) the pattern of data collection of individual product categories varies with regards to the most popular products. Data on non-food products are rarely collected. From an end users perspective, the quality of the collected data is shown in figure 1.

The end users of organic market data expressed that 'relevance' is always the main quality need for existing data that they used, with other quality indicators ranked about equal: namely that data should be affordable, available as often as needed, accurate, up to date, easily accessible, comparable with other data that respondents use, of high quality, and sufficient for the respondents' needs. The most common criticisms of organic market data were with regard to accessibility, availability as often as needed, and whether it is up to date. Data on organic import volumes were also criticised as being inaccurate and incomparable with other used data, while retail consumer price data for organic food and organic sales data at retail level were both criticised on their affordability. When asked about available data that is not used, the main reason was lack of relevance. Price and comparability were rarely the reason, and infrequency and inaccuracy were almost never the reason. The majority of respondents reported however that they continue to use poor quality data if that is all that is available.

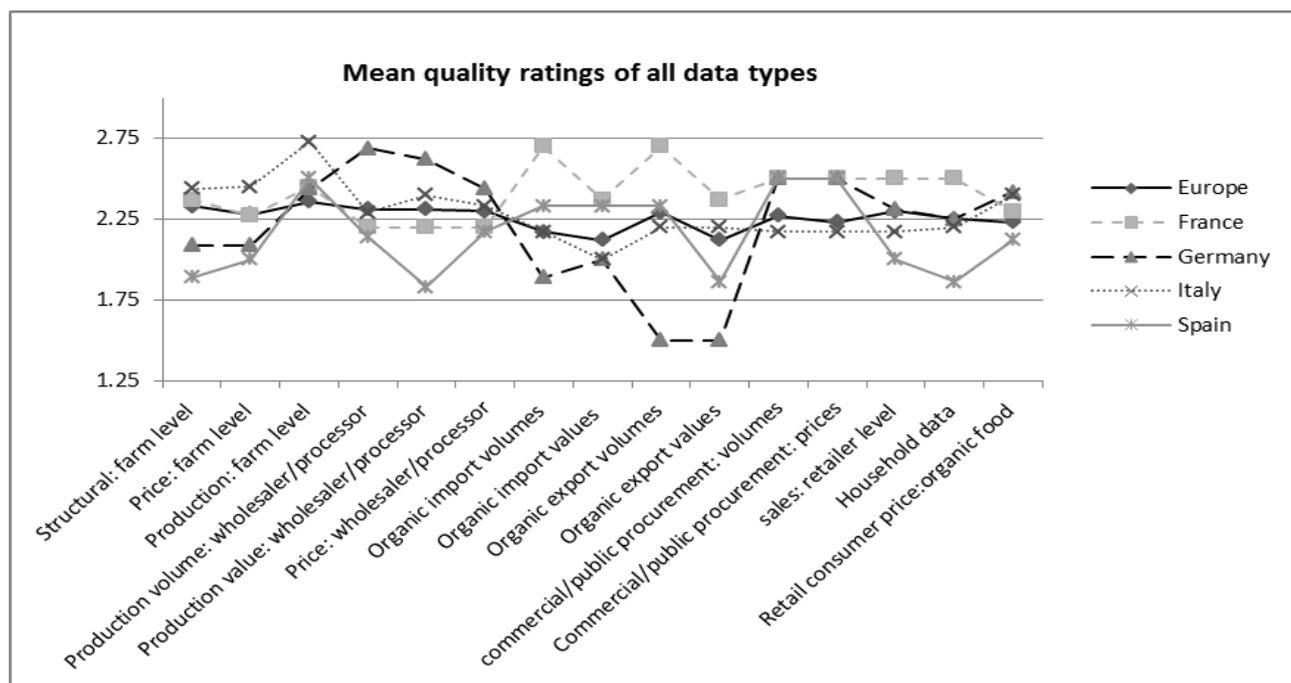


Figure 1: Mean ratings of overall quality for specific data types

(1 = poor quality; 5 = good quality)

### Data publication

The responses by data collectors to the question about data publication frequencies suggest generally low publication rates (especially for data other than production data); with less than 50% in each group of countries giving a positive answer. Of all the data types that were asked about, production data are most likely to be freely available, but not all production data that are collected are also published. Data are usually published annually; price, retail or export data are occasionally published more frequently. When end users were asked about data that is unavailable, about 30 respondents (up to 25% of respondents) could not access each data type, although most would use the data if available and would wish for monthly or annual data to be available for all data types.

### Discussion

The purpose of these surveys was to produce an overview of collectors of organic market data and the needs of end users. In many cases, the quality evaluation responses and data needs expressed by end users to export volume and value data were very similar (or the same) against all of the quality criteria. Using the same means of comparison, import volume and value data, and commercial /public organic procurement price and volume data were evaluated very similarly. These data types are all considered to be quite different from the data collection perspective, but seem to be bundled from the end user perspective.

The market data collection effort remains varied across Europe. The surveys may not have detected all activities that are carried out, however, there was an almost universal expression by end users of feeling at a competitive disadvantage because of lack of data. This is problematic, as without good quality information it is difficult for stakeholders to make decisions.

### Disclaimer:

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