How to improve market data quality?

Case study on improved data collection methods in Germany

Diana Schaack - AMI
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

4,23

0,61

0,61

0,65

4,50

2,21

2,07

Others (butchers, bakeries, fruit & vegetable stores, direct sales, farmer’s markets, Online Shops)

Supermarkets, Discounters, drugstores

Natural food stores (incl. big farmer’s shops)

Source: Arbeitskreis Biomarkt based on GfK, Nielsen, BioVista and Klaus Braun
Sales values and volumes changes 2013 in %

- Red Meat: -7.2% sales volume, -6.4% sales value
- Bread: -7.8% sales volume, -5.9% sales value
- Cheese: -6.5% sales volume, -5.8% sales value
- Eggs: -7.1% sales volume, -5.7% sales value
- Poultry: -2.7% sales volume, 3.6% sales value
- Yoghurt: -1.3% sales volume, 1.4% sales value
- Cream cheese: -2.2% sales volume, 2.5% sales value
- Butter: +0.7% sales volume, 4.6% sales value
- Cream products: +0.6% sales volume, 5.6% sales value
- Fresh vegetables: +2.0% sales volume, 6.7% sales value
- Fresh fruit: +2.0% sales volume, 4.5% sales value
- Meat products: +2.0% sales volume, 7.6% sales value
- Milk: +2.0% sales volume, 6.0% sales value
- Potatoes: -4.8% sales volume, 17.1% sales value

Source: AMI- Analysis based on GfK household panel
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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
Potato prices (whole sale level) in different European countries

- FR - SNM
- DE - AMI
- IT - Ismea
- UK - Soil Association
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