Data network for better European organic market information

How to improve market data quality?

Case study on improved data collection methods in the UK

Current status market data collection

- ✓ Production data
  - ✓ Collected by CBs as part of inspection process, collated by Defra (submitted to Eurostat and publication).
  - ✓ Scotland (SRUC) and Wales (Aberystwyth University and Organic Centre Wales) carry out annual surveys of organic producers
  - ✓ No production volume (e.g. yields) and value data
- ✓ Domestic trade/market data
  - ✓ Retail values published in the Soil Association Organic Market Report based on panel data and additional surveys of Soil Association certified businesses.

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Data gaps and issues

- ✓ There is no **producer survey** carried out in England and the Welsh survey may be at risk due to funding constraints.
- ✓ Time delay in publication of **production data** (due to lack of harmonisation in reporting) limits usefulness to stakeholders.
- ✓ Limited data on **retail sales** through non-multiple sales channels such as independent retailers, box schemes, farm shops, and farmers' markets.
- ✓ There is limited data on **catering** sales.
- ✓ Very limited (if any) data on **organic imports** to the UK and **exports** from the UK.
- ✓ Limited **price data** at farm and retail level

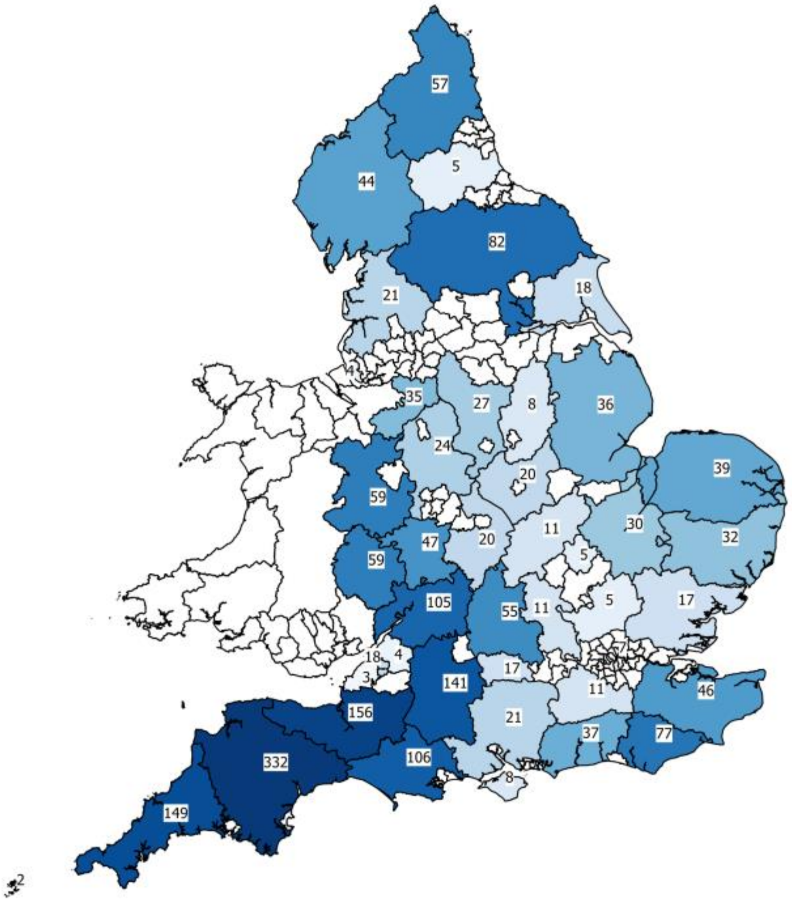
Areas of improvement: UK case study

The Organic Research Centre and the Soil Association together aim to:

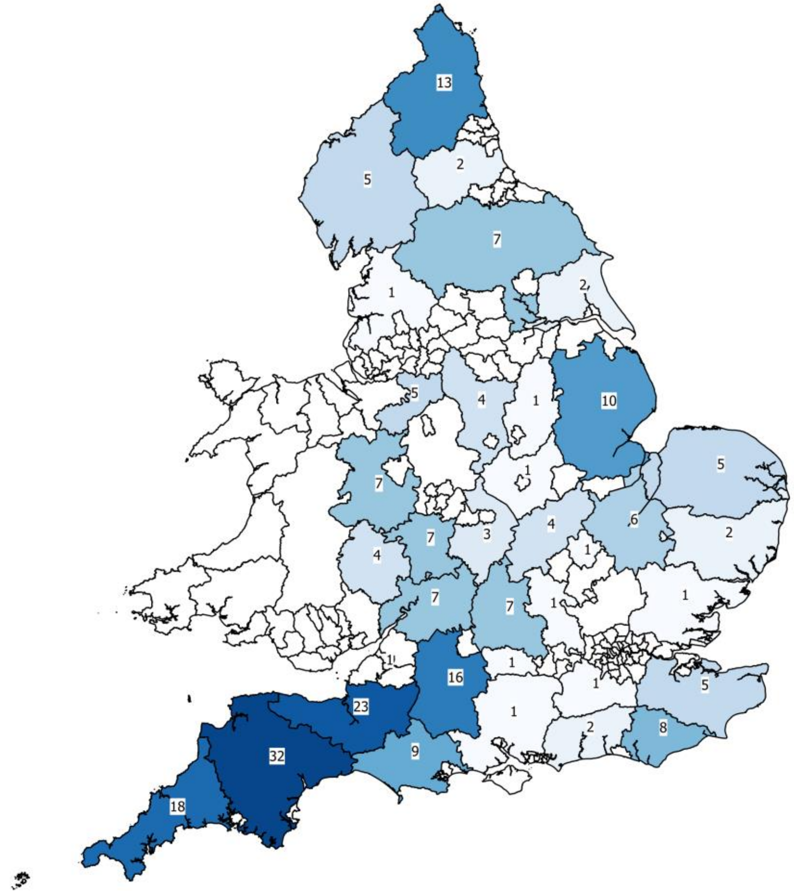
- ✓ Carry out activities to improve forecasting of **production** trends:
  - ✓ Improving timeliness of publication of production data
  - ✓ Carry out a producer survey in England.
- ✓ Improve data collection to obtain greater coverage of **retail sales** through non-multiple channels (independent retailers, box schemes, farmers’ markets, farm shops, catering).
- ✓ Further analysis of **retail panel data** from Nielsen.

First results – English producer survey

- ✓ 2589 producers and 135 producer/processors in England (Defra's "Organic Statistics 2012 United Kingdom" publication).
- ✓ Contact lists (over 2000 producers) were obtained from the Soil Association and OF&G.
- ✓ An initial sample of 1,000 was selected at random and contacted about participation in the telephone survey.
- ✓ 8.2% (223) of producers completed the survey.



SA and OF&G contacts (2000)

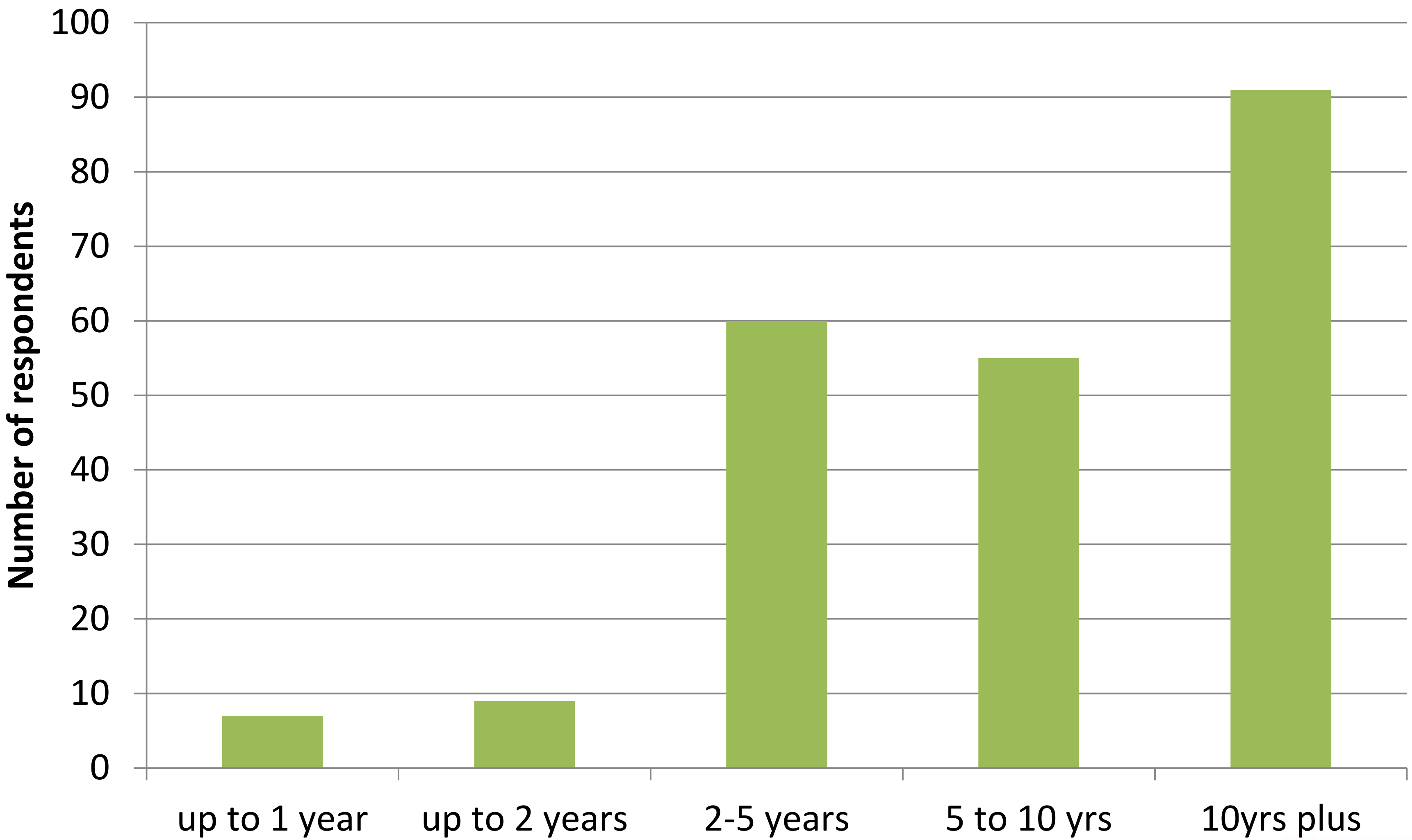


Final sample of 223 farms

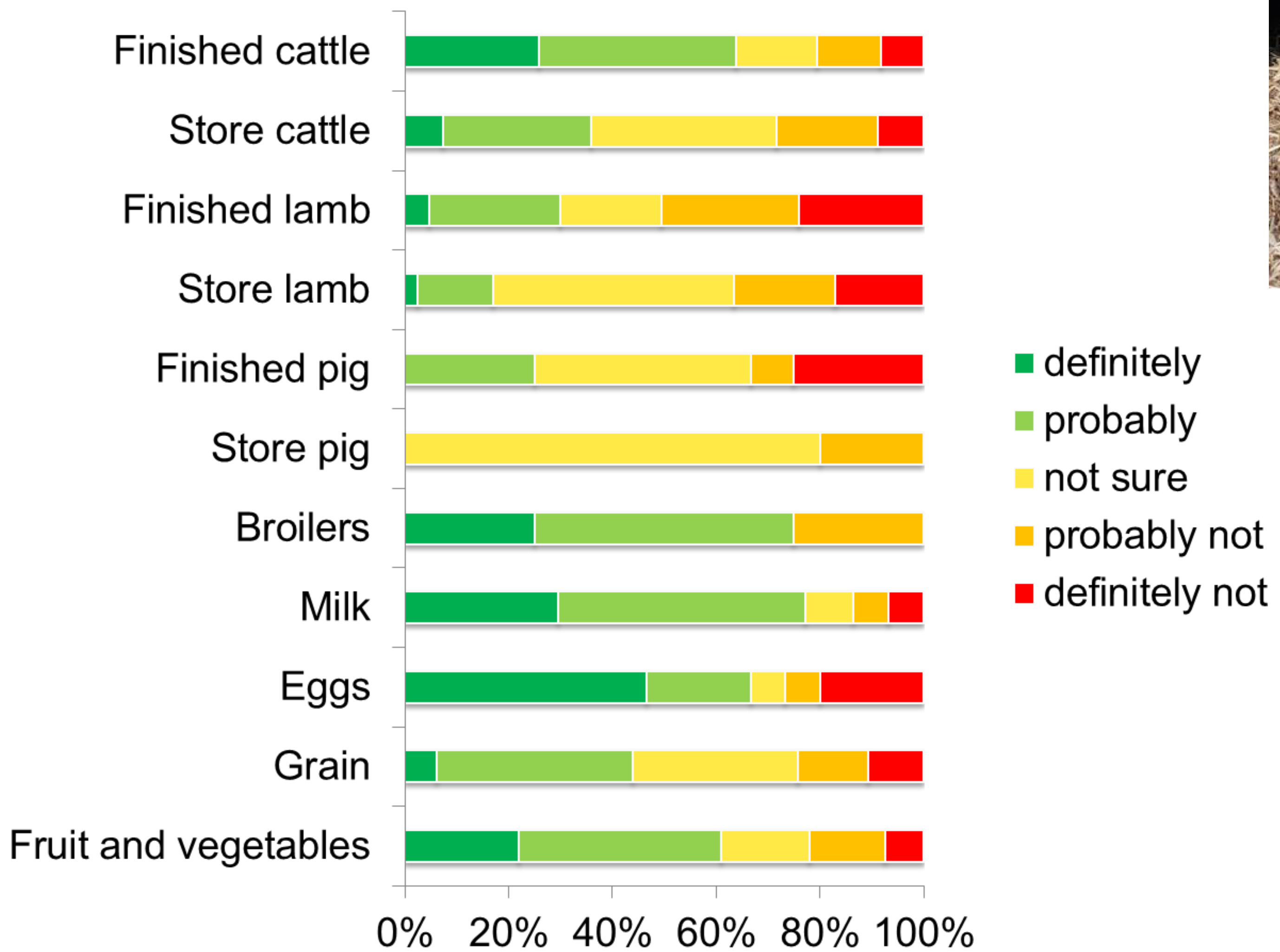
Producer survey questions

- ✓ General farm information
  - ✓ Total land area and breakdown.
  - ✓ Numbers of livestock (head) within categories.
  - ✓ Related activities such as processing, tourism, renewable energy.
- ✓ Future intentions
  - ✓ Whether remaining organic
  - ✓ Whether retiring from farming
- ✓ Production levels
  - ✓ Numbers of head of livestock sold; amount of milk, eggs sold; tonnage of crops sold
- ✓ Prices for milk, eggs, arable crops
- ✓ Opinion on organic prices
  - ✓ High enough to continue in organic production
- ✓ Production intentions within the next 2 years
  - ✓ Plans to increase, decrease or remain at similar levels
- ✓ Direct sales
- ✓ Export outside the EU

How long do respondents intend to remain organic



Are prices sufficient to remain in organic production?



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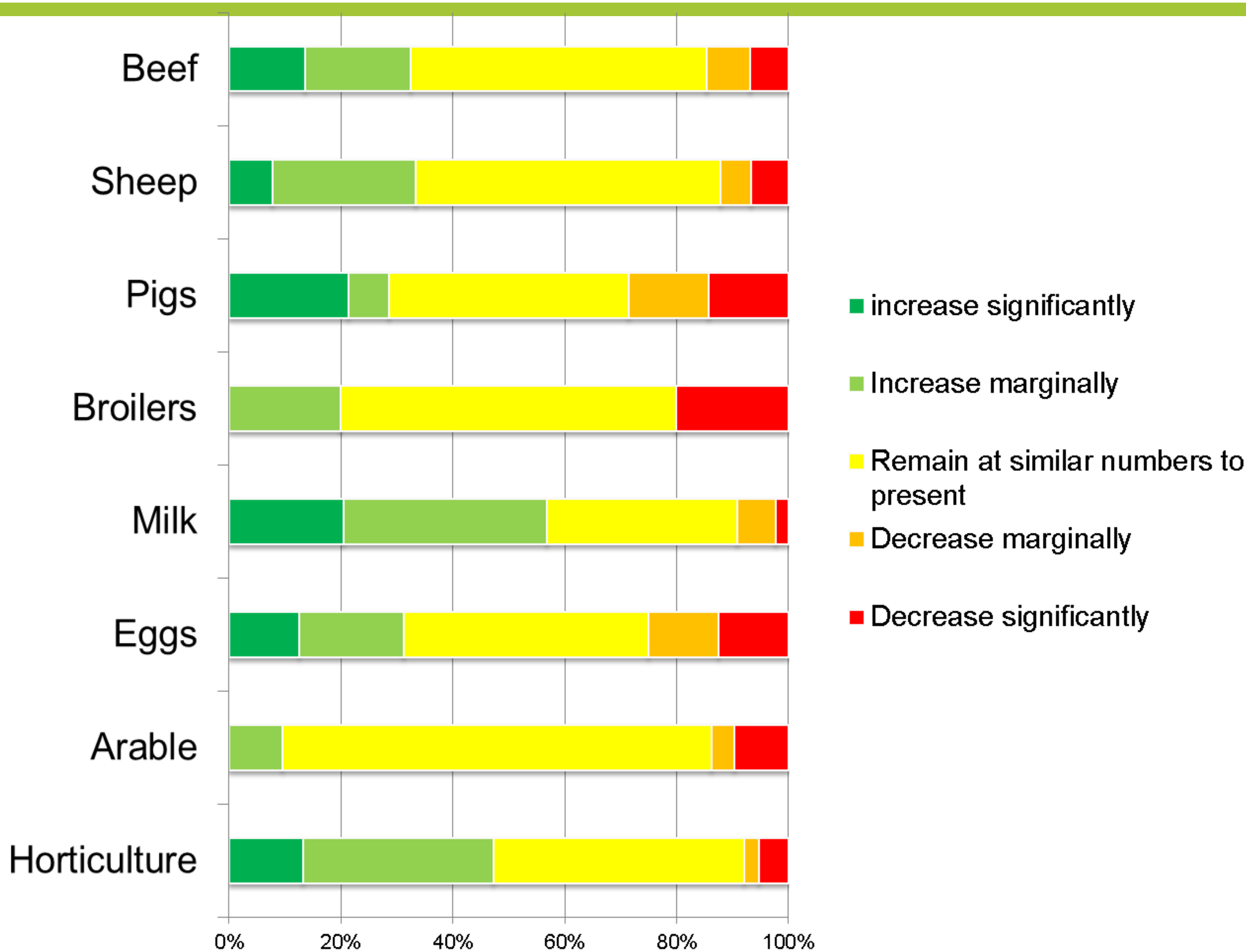
What are the plans for production in the next two years?



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Progress of work

- ✓ Continue analysis of the producer survey data
- ✓ Analysis of EPOS (electronic point of sale) data from Nielsen
- ✓ Analysis of survey of farm shops and farmers' markets
- ✓ **2014 Organic Market Report from the Soil Association is expected on 12th March.**
- ✓ **www.soilassociation.org/marketreport**