



Data network for better European organic market information

# The case studies of the Organic Data network

Susanne Padel, Catherine Gerrard and Anja Vieweger

# Introduction

- ✓ Testing/improving data collection procedures
- ✓ Publishing better market reports in six countries/regions



UK (**ORC/SA**)



France (**AgenceBio/FIBL**)



Germany (**AMI/UKNA**)





Czech Republic (**CULS/external**)



Italy (**UPM/IAMB/external**)

Mediterranean (**IAMB/** MOAN-Partners, IMO-TR)



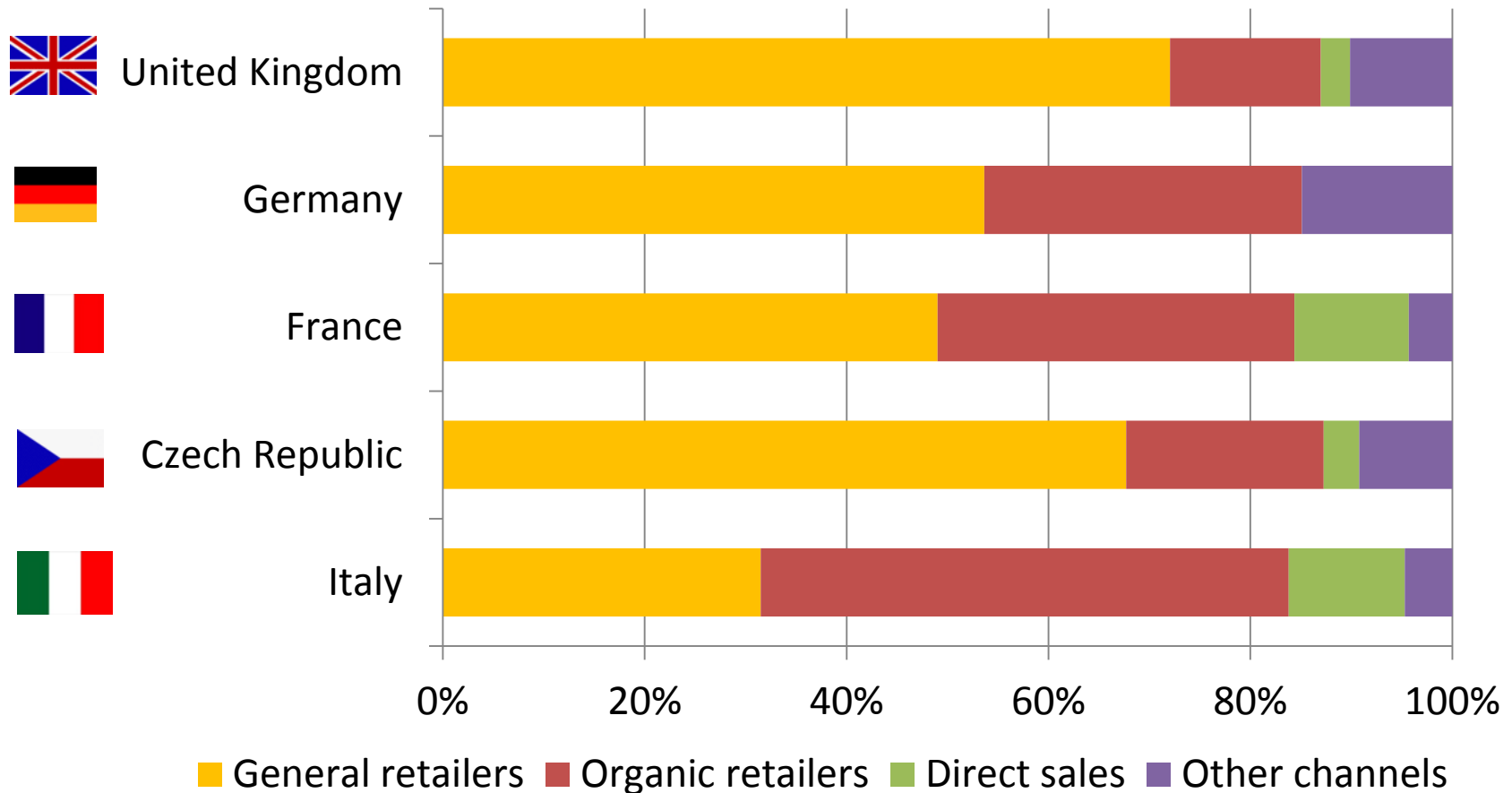
	UK 	DE 	FR 	CZ 	IT 	MOAN
<b>Production (volume and value)</b>	Timeliness Producer survey		Missing sectors (e.g. wine)	FADN data for cross checking	Data harmonisation to provide volume and value estimate	Consolidate countries
<b>Domestic market/retail</b>	Panel data sources Other sales channel surveys	Task force Other sales channel surveys	Sector –body approach Cross checking		Cross checking two data sets	
<b>International trade</b>		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
<b>Price</b>		International comparison of		Analyse and publish non-	[Cross check prices between	

# 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)

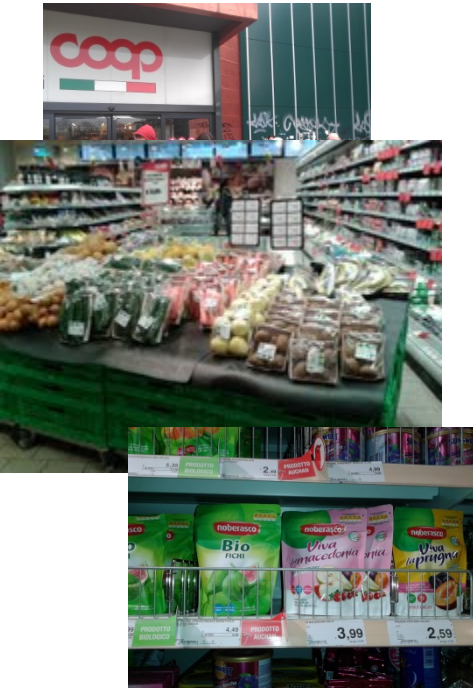


# Domestic Retail: Sales channels (2011)



# Domestic 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 with other sources



# 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 for organic shops in France and Germany











# Estimating domestic retail market



- ✓ No single data source covers the whole organic market
- ✓ Different data sources combined in a piecemeal or “jigsaw puzzle”
- ✓ Cross checking
  - ✓ Sector experts, Control body data
  - ✓ Production data
- ✓ Collaboration
- ✓ Third part brokerage between competitors



# Farm-level price comparison: Germany

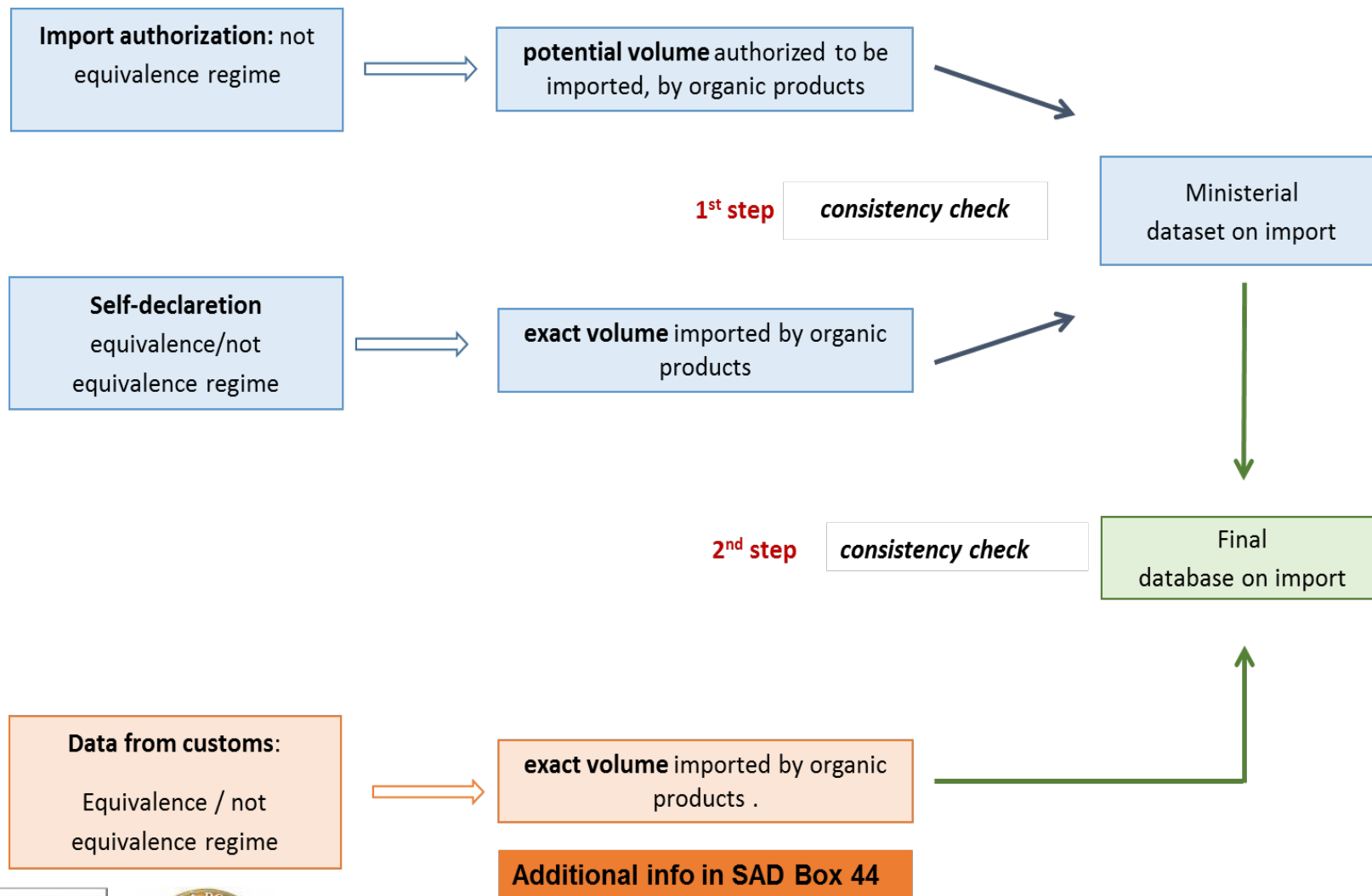
		Data provider	Product	Level of processing/ packaging	Transport costs	VAT
DE		AMI	All	Sorted and cleaned but not packed	Carriage free processor	Excluded
UK		Soil Association	All	unknown	Farm-gate	Excluded
FR		RNM	Fruit, vegetables, potatoes (non-processed)	Retail	Carriage free processor	included
				Wholesale		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 carcasses	Ex Slaughterhouse	Excluded

# Price data collection issues and questions

- ✓ Different publishing dates and frequencies
- ✓ Different product categorisation
- ✓ Data collection level
  - ✓ Farm-gate, whole sale, retail,
- ✓ Farm data
  - ✓ Commodity raw material or packed/processed
  - ✓ Transport/delivery costs included
- ✓ Retail data
  - ✓ Inclusion or exclusion of VAT (VAT rate)



# Third country import data: e.g. Italy



# Different data sources for import data

Methods (example)	Trade type	Comments
Estimating volume using important authorisations (DE, CZ)	Import data countries not on third country list (no longer relevant)	No accurate prediction of volume/value
Customs declarations (FR, IT)	Import from third country list	Collaboration from customs authorities essential Box 44 used in some countries
Self-declaration (IT)	Import from all third 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, FR)	All foreign trade	Only published in DK No common organic identifier in general

# Publication of six market reports



# Making changes for improved quality

- ✓ Direct exchange of experience between various bodies involved directly or indirectly
- ✓ Greater awareness of quality issues
  - ✓ Using international classification systems
  - ✓ Importance of sampling and coverage
  - ✓ Data checks and cross-checking
- ✓ Awareness of the need for doing more
- ✓ Slowly filling some data gaps



# Conclusions

- ✓ Many different organisations are involved in data collection
  - ✓ Who has overall responsibility for collecting 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
- ✓ Coherent and durable national platforms
- ✓ Need for cross borders exchange to improve the data collection system and data quality





# Acknowledgements

- ✓ Thanks to the case study teams in Czech Republic, France, Germany, Italy, MOAN and UK
- ✓ This project has received funding from the European Union<sup>3</sup> Seventh Framework Programme for research, technological development and demonstration under grant agreement No. 289376. The opinions expressed in this contribution are those of the author and do not necessarily represent the views of the European Commission .





Data network for better European organic market information

Thank you!

[www.organicdatanetwork.net](http://www.organicdatanetwork.net)