



Data network for better European organic market information



How to improve market data quality?

Case study on
improved data collection methods in France

The present data collection system

Data providers

- 9 Certifying Bodies
 - ✓ Data bought from CBs and managed by Agence Bio
 - ✓ Adequacy to Agence Bio specifications
 - ✗ No typology of the processors, distributors
 - ✗ No data on certified processed products
- Inter-professional organisations
 - ✓ Organic committee in almost each branch
 - ✗ Not the same level of market knowledge, investment
- Administration (FranceAgriMer, SNM, SSP)
 - ✓ Compulsory survey, census every 10 year, price report
 - ✗ Not fully adapted to the organic sector

The present data collection system

Agence Bio — French observatory for organic farming

- Annual Organic market evaluation
- 5 periodic sectoral reports (data gathering)
- Managing the notification system enriched with basic questions
 - ✓ Classified contacts list for survey
 - ✓ Real time follow up of the operators
- Consumers' barometer
- Specific organic committee (Pork, wine)
- Studies on specific issues
- Annual report on organic sector

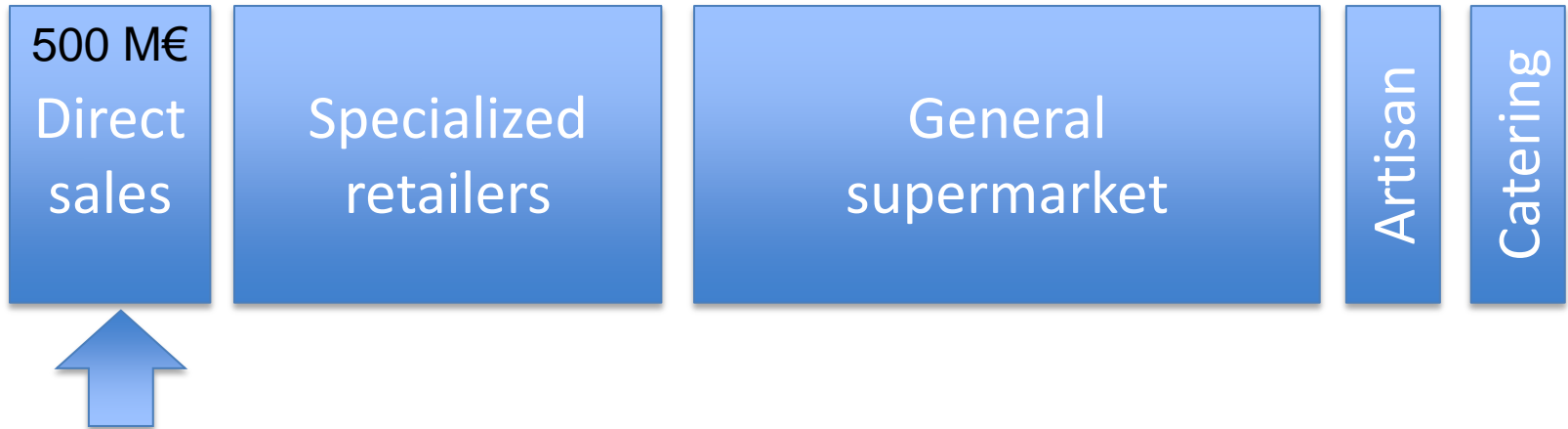
➔ Trying to fill the gaps and solve issues

Focus on the French market evaluation

- ✓ Direct data collection from
 - ✓ General supermarkets and Specialized retailers (15 brands) exhaustive mail – phone survey
 - ✓ Processors 2500 operators (online– phone survey)
 - ✓ Wholesaler (wine and F&V survey)
 - ✓ Import/Export value by sectors (incl. EU trade)
 - ✓ Processor survey
- ✓ Other data sources
 - ✓ Panels (IRI, Biolinéaire, Kantar)
 - ✓ Sectoral data from all providers

Focus on the French market evaluation

- ✓ A 4200 M€ organic market in 2012



Direct sales 492 M€

2012 and 2014 online survey to 7500 producers.

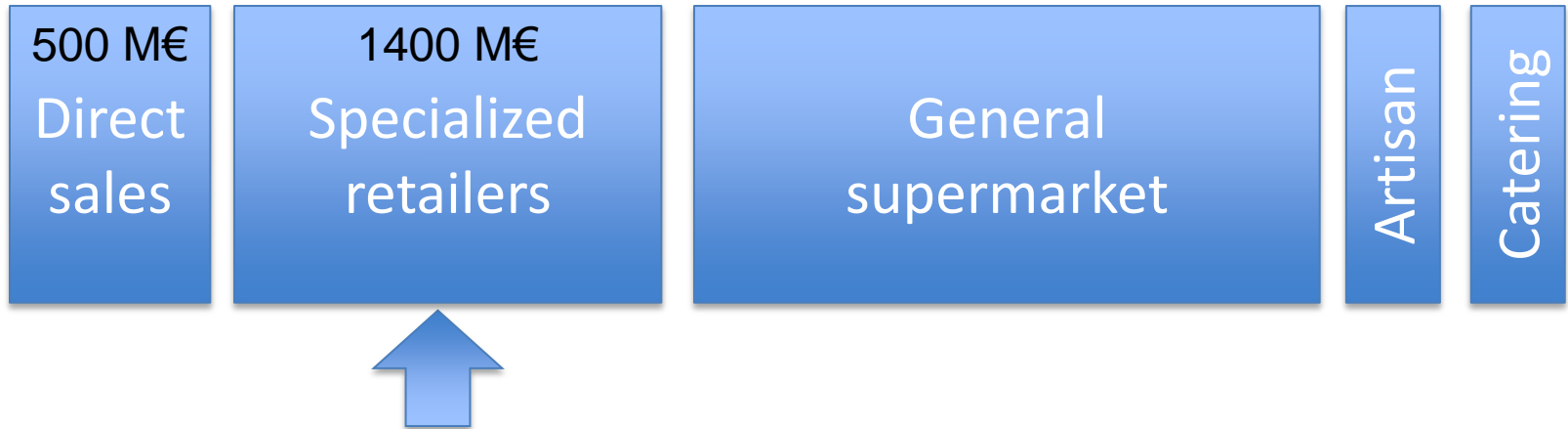
Extrapolated on the notification basis

✗ Out of scope sales

Coverage : representative sample

Focus on the French market evaluation

- ✓ A 4200 M€ organic market in 2012



Specialized retailers 1 425 M€

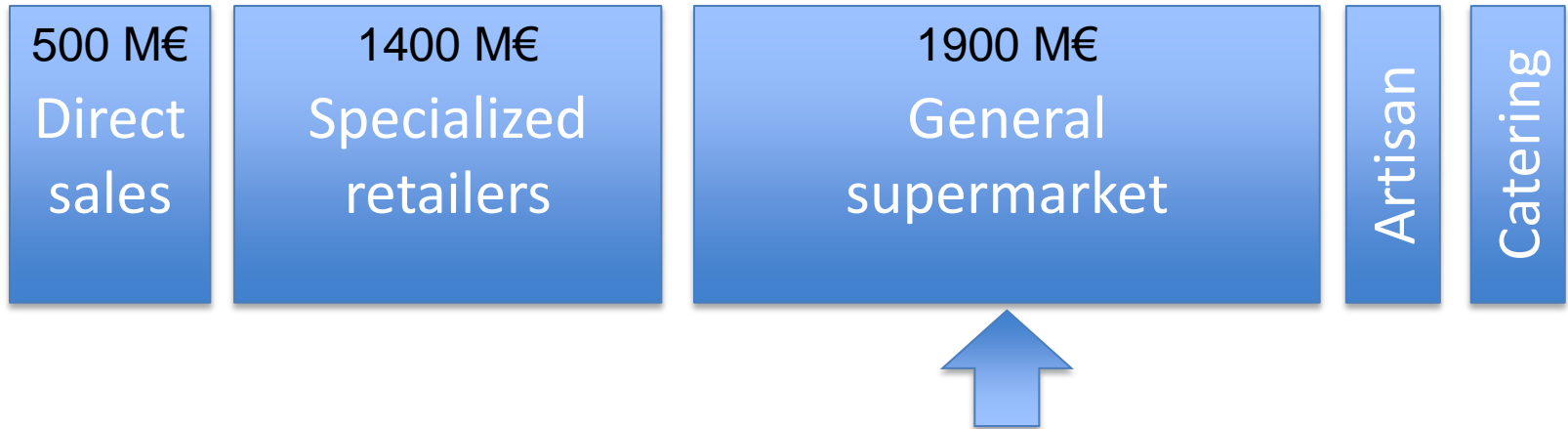
“Biolinéaire” database (shop size and turnover)
email - Phone survey

✗ No data on sales volumes

Coverage : 85% of the global turnover

Focus on the French market evaluation

✓ A 4200 M€ organic market in 2012



General supermarkets : 1 903 M€

IRI Symphony census

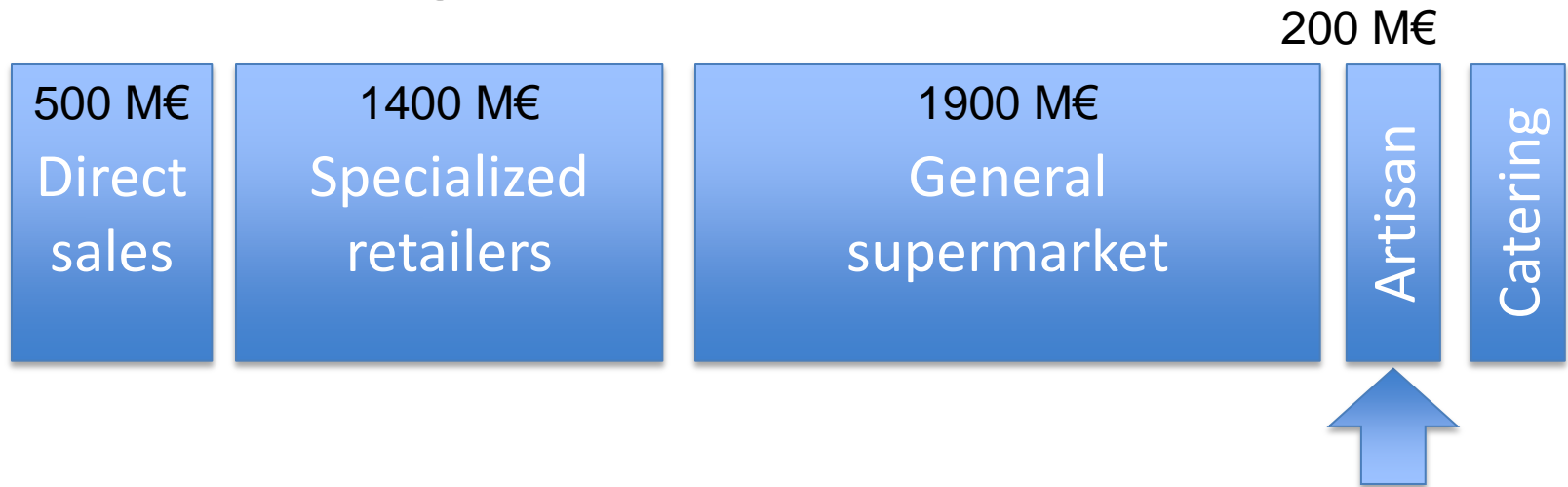
email - phone survey

Hard discount prices and references reporting

Coverage : 60% of the global turnover

Focus on the French market evaluation

✓ A 4200 M€ organic market in 2012



Artisans and merchants : 184 M€

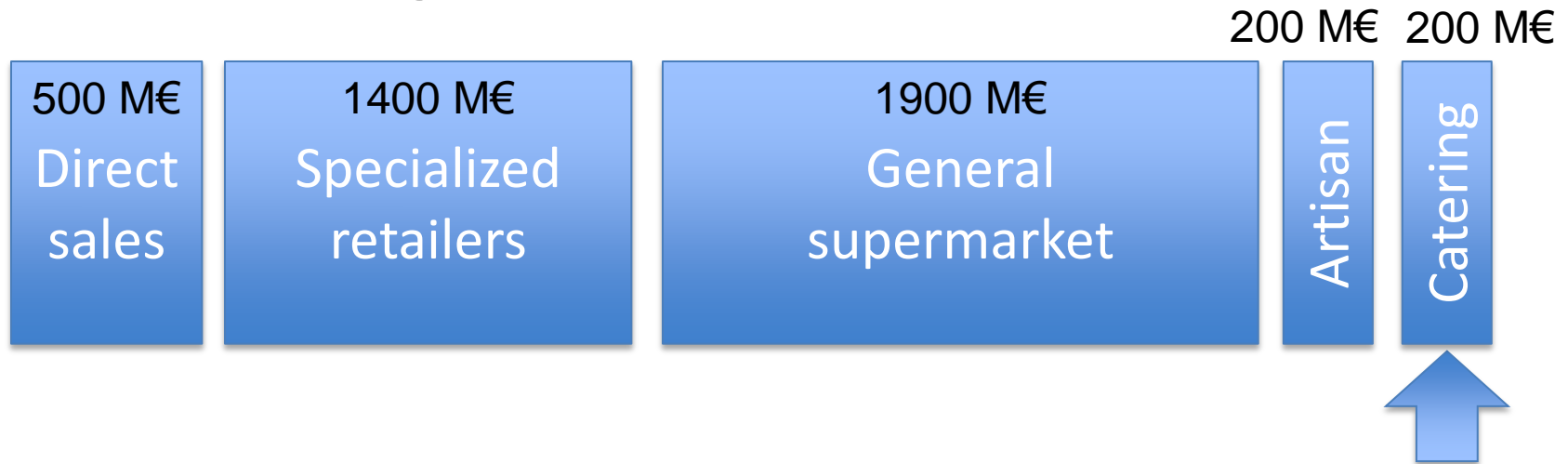
Slaughter houses interprofessional survey → Butchery

Mills compulsory administrative survey → Bakery

Coverage : exhaustive

Focus on the French market evaluation

✓ A 4200 M€ organic market in 2012



Catering : 169 M€

Phone survey 400 restaurants
Volume, type of ingredients,

Coverage : representative sample

Identifying data gap and issues

- ✓ Time delay of publication of processed data
- ✓ Harmonisation of CBs collection methods
- ✓ Very limited sales volume assessment
 - Only global supermarkets sales (IRI symphony)
- ✓ Limited data on restaurant sales
- ✓ Limited data on Import-export volume
- ✓ Limited price data at farm level or retail level
- ✓ Reported needs from different sectors

Data collection improvement

- ✓ Specific market studies carried out in 2013
 - F&V visibility in general supermarkets
 - Wine production and export volumes
 - Marketing pork meat products
- ✓ Improved survey for the 15 major retailers
 - More detailed nomenclature for some products (fruit, vegetables, groceries)

Data collection improvement

Working with the French customs to assess the French imports / exports

- ✓ Imports from third countries
CANA R058 equiv. CACO C644
- ✓ Introductions from EU
Threshold of 460 000 € introduction purchase
- ✓ Export – Expeditions : No additional organic code

Detailed market survey for intra/extra EU trade

- ✓ Processors survey

Data collection improvement

✓ Assessment of production volumes

- Surface and yields assessment
- Slaughter houses survey linked with market survey
- Cereals, eggs, fruits and wine

✓ Assessment of sales volumes

- Low survey completion
- Sold as non-organic
- On-farm consumption (grain and fodder)
- Losses

Thank you

See you on the
Paris international
agricultural show.



And keep an eye on :

www.agencebio.org