



Data network for better European organic market information

# The case studies of the Organic Data network

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OrganicDataNetwork Workshop, Bari, July 10 & 11, 2014

# Introduction

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

UK



France



Germany







Czech republic



Italy

Mediterranean

- ✓ Reporting on experience
  - ✓ Cross country comparisons
  - ✓ Advice for future

	UK	DE 	FR 	CZ 	IT 	Mediterranean Region
<b>Production</b>	Producer survey	Control body data	Missing sectors (e.g. wine)	FADN data for cross checking	Production value	Consolidation in several countries
<b>Domestic market/retail</b>	Data sources Other sales channel surveys	Task force Other sales channel surveys	Sector –body approach Cross checking		Two main data sets cross checked	
<b>International trade</b>	NA	National project	Customs data International comparison	Customs data	Integration of sources Cross-checking	Combining sources Cross checks
<b>Farm level Price</b>	(producer survey)	International comparison		FADN	Harmonise and cross-check	
<b>Retail prices</b>	NA	(collected)		Publish non-current		

# Production data

- ✓ CB data for crop & livestock data
  - ✓ Common classification systems
- ✓ Different ways 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)



# Retail data - multiples

- ✓ Product classifications not harmonised
- ✓ 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
- ✓ Cross checking



# 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
- ✓ Publication may improve future response rates








# Overall market estimate



- ✓ Combining a number of data sources in a piecemeal or “jigsaw puzzle”
- ✓ Cross checking
- ✓ Collaboration
- ✓ Third part brokerage between competitors

# Farm level price data

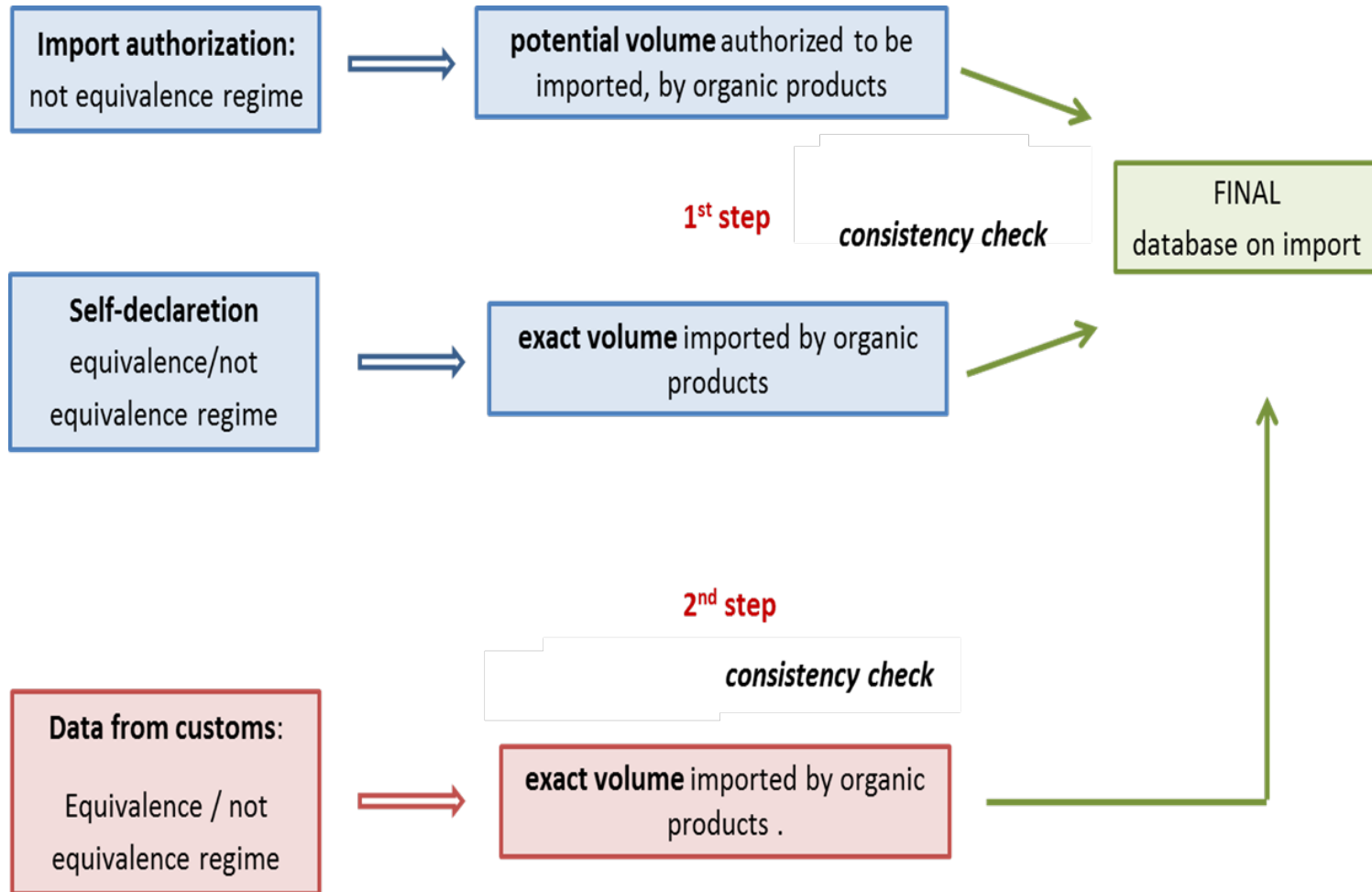
	Products	Level of processing/ packaging	Transport costs	VAT
<b>DE: AMI</b> 	All	Sorted and cleaned but not packed	Carriage free processor	excluded
<b>UK: Soil Association</b>	All	unknown	Farm-gate	excluded
<b>FR: RNM</b> 	Fruit, vegetables, potatoes	Retail and wholesale stage for non-processed fruits & Vegetables	Carriage free processor	VAT excluded
<b>FR: La Depeche</b>	Cereals, protein crops, oil seeds	Loose, and cleaned	Carriage free processor	excluded
<b>IT: ISMEA</b> 	All	loose and packed Depending on products	Carriage free processor	excluded
<b>IT: Stock Exchanges Milano and Bologna</b>	Cereals, protein crops	Loose, in bulk	Ex exchange	excluded
<b>NL: Stock Exchange Emmeloord</b> 	Onions, Carrots	Onions raw, Carrots packed in parings	Ex exchange	excluded
<b>DK: Friland</b> 	Pigs and Beef	Animal carcasses	Ex Slaughterhouse	excluded



# Comparing farm level prices (DE)

- ✓ Different publishing dates and frequencies
- ✓ Different product categories
- ✓ Inclusion or exclusion of VAT (and the rate of VAT where it is included)
- ✓ Whether prices are “farm-gate” or include transport/delivery costs

# For example import data Italy



**Additional info in SAD Box 44**

# Import data

Methods (example)	Trade type	Comments
Foreign trade statistics (DE, DK)	All foreign	Published Data in DK No common organic identifier Box 44 used
Self –declaration (IT)	Import from compliant countries/ non-compliant countries	So far only one country
Surveys (various)	All foreign trade	Sampling, response rate
Panel data (DE)	All foreign trade	If country of origin declared
Organic import authorisation from customs declarations (DE, FR, CZ, IT)	Import from non-compliant countries	Collaboration from customs authorities essential  No accurate prediction of volume/value

# Supply chain balances attempted

- ✓ Used in agricultural statistics
- ✓ *Basic equation: organic production + organic imports – organic exports = organic produce brought to the market*
- ✓ Biggest problem is data gaps
- ✓ Easier for products eaten mainly raw (e.g. carrots) than for processed products
- ✓ Further work in Organic Data Network

# Making changes for improved quality

- ✓ Direct exchange of experience
  - ✓ Those directly involved in producing market reports
  - ✓ With researchers at workshops
- ✓ Six publications (some later this year)
- ✓ Continued and increased use of international classification systems
- ✓ Much more cross-checking
- ✓ More awareness of sampling and coverage
- ✓ Slowly filling some data gaps

# Conclusions

- ✓ *“Many cooks spoil the broth”*
  - ✓ Many different organisations
  - ✓ But of none has main task to collect 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
- ✓ At national level aim for coherent and durable cross collection platforms
- ✓ Exchanging ideas and sharing experiences across borders can improve the data collection system and data quality