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EISfOM European Information System for Organic Markets
A European Commission funded Concerted Action Project

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QLK5-2002-02400

Annex 1 of the Deliverable D2

Country Reports

on

Data Collection and Processing Systems (DCPSs) in 32 European Countries

May 2004

This report has been carried out with financial support from the Commission of the European Communities under Key Action 5 of the Fifth Framework Research and Technological Development Programme for the concerted action "European Information System for Organic Markets". The views expressed are those of the authors and do not necessarily reflect the views of the European Commission, nor do they in any way anticipate the Commission's future policy in this area.

Contents

1 Austria

Country Report

AUSTRIA

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1.1 National relevance of organic farming

As Austria is one of the pioneers in the development of organic farming the production and retailing structures are well developed. Therefore in 2002 the number of organic farmers was accounted with 17.891 (taking part in the Austrian environmental program ÖPUL), which in relation to the total number of farmers makes up a percentage of 8,2 %. Concerning the organic area in 2002 201.284 ha of grassland and 92.115 of arable land were under organic management. In total the organic area was about 296.154 ha (8,73 %). (Grüner Bericht 2002)

According to recent estimations the market volume for organic products in Austria accounts for about 300 million Euro. The main sales channels are big retailer chains with about 75 % of the market volume, followed by direct marketing and special organic shops (15 %) and sales to public canteens (10 %).
As for import level mainly fruits and vegetables as well as processed cereals are imported from Italy or other southern European countries. Main export partners are GB, D and FR, especially concerning meat (both beef and pork) and milk products (Lebensmittelbericht 2003).

Table 1-1: Organic Agriculture in Austria

Number of organic farms	18.576
Organic area in ha	296.154 ha

1.2 Structure of national statistic/data providers in agriculture

Table 1-2: Structure of surveyed institutions in Austria

Type of Organisation						
	Governmental	Semi-Governmental	Non-Governmental	Private (non profit)	Privat (Profit)	***TOTAL***
Contacted	1	2	4	1	3	11
Responded	1	2	1		2	6
Overall response rate						*54 %*

Field of Activity							
	Market research	Primary statistical DC	Secondary statistical DC	Public administration	Certification	Research	Specialist interest group
Responded (multiple entry possible)	1	3	2	1	1	1	2

1.3 Information about the surveyed institutions

1.3.1 Statistik Austria

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Statistik Austria is a semi-governmental organisation, which is financed by public funds. The main assignment of the organisation is to provide data on demographics, economic development, spatial economics and political economics in Austria. The directory of spatial economics is mainly dealing with all aspects of agriculture and agricultural production in Austria as well as with statistics on tourism or energy use. Additionally to production Statistik Austria also provides data on trade (import/export) of agricultural products as well as on consumption. Primary statistical data for analysis are mainly provided by the Ministry of Agriculture as well as the Agrar Markt Austria (INVEKOS). Regarding all agricultural statistics there is no distinction made between organic or conventional products. By EU-legislation and by order of the Ministry of Agriculture the Statistik Austria is also obliged to implement the Farm Structure survey.(FSS)

1.3.2 Agrar Markt Austria

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The Agrar Markt Austria is a semi-governmental organisation, which is financed by public founds and partly by membership fees. The main challenge of the organisation is to promote agricultural products with Austrian origin. Besides one main task is the execution of the market regulations since Austria joined the European Union in 1995. One main instrument therefore is the implementation and control of the national program for environment and agriculture (ÖPUL), from which the main structural agricultural statistics (agricultural area, land use, number of animals, etc.) can be derived. Regarding statistics on organic farming there are two main DCPS integrated: INVEKOS and ROLL-AMA;
INVEKOS (Integrated system for administration and control) is a data pool, which contains data on EU specific support measures for agriculture. As most (95%) of all

farms in Austria take part in the ÖPUL (Austrian environmental programme), which is partly financed by the EU, the INVEKOS data give detailed information about the structural situation of organic farms in AUSTRIA.
ROLL-AMA in general gives information on the consumption of food in Austria, also integrating a special part about organic. Besides a household panel, which is done at regular intervals (4 times a year), it also contains statistics on organic food sold through the main retailer chains in Austria.

1.3.3 LBG-Wirtschaftstreuhand

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LBG –Wirtschaftstreuhand is a private business management consulting firm, which besides other activities is also involved in the analysis of voluntary bookkeeping farms in Austria. By order of the ministry of agriculture the economic situation of a representative number of farmers is analysed and published yearly in the "Grüner Bericht", a compilation of the main relevant data concerning agriculture in Austria.

1.3.4 Ministry of Agriculture, Forestry, Environment and Water Management

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The Ministry of Agriculture, Forestry, Environment and Water Management acts mainly as an coordinator in collecting statistical data in respect of agriculture than primary data collection. A yearly report (Grüne Bericht) provides a compilation of all relevant agricultural data.

1.4 Institutions which run "Organic DCPS"

Most important institutions:

- AMA Marketing GMBH
- LBG Wirtschaftstreuhand
- Ministry of Agriculture

Other DCPS (which acquire only data segments):

- BIO ERNTE AUSTRIA: statistics on number of farms, estimations on marketed product volumes for milk, eggs, pigs, beef, and some sorts of vegetables and fruit.

1.5 Results of the second stage inquiry

Table 1-3: Number of surveyed institutions/respond rate/respond structure AUSTRIA

Number of contacted institutions	Number of Responses	Response rate	Respond structure
11	2	18%	Agrar Markt Austria (semi governmental, public administration) LBG Wirtschaftstreuhand private (Profit), primary statistical data

Table 1-4: Overview about existing DCPS by actor level

DCPS	Institution	Actor level	Total	Org.
INVEKOS	AMA Marketing GMBH	Farm level	X	X
ROLL AMA	AMA Marketing GMBH	Consumer level	X	X
FADN	LBG Wirtschaftstreuhand	Farm level	X	X
Price Statistics	LBG Wirtschaftstreuhand	Farm level	X	X
FSS (Agrarstrukurerhebung)	Statistik Austria	Farm level	X	(X)
	Statistik Austria	Import/Export level, Retailer level, Wholesaler/Processor level	X	
ALFIS	Ministry of Agriculture	Farm level, production statistics, price statistics, labour force, import/export	X	

1.6 Detailed information about DCPS, which include organic data collection

1.6.1 Farm Level

FADN (Grüner Bericht)

The DCPS shows the development of farm incomes and agricultural financial ratios for farms in Austria. By order of the ministry of agriculture a representative sample is

conducted yearly by a private firm (LBG) and the results are presented in a yearly report called “Grüner Bericht”, where all the main figures concerning the development of the agricultural sector in Austria are illustrated. The report is openly available. The integration of organic farms into the sample took place firstly in 2000, since then particular income statistics on organic farms in Austria are available.

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Name of the DCPS: FADN (Grüner Bericht)
- Statistical Scope: income statistics, agricultural financial ratios
- Segmented by: farm type/size and product group

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

The DCPS covers both organic and total data, a distinction between organic and conventional is possible;

Does the DCPS promise relative valid and reliable results?

The data collection is done as a representative sample of 2264 conventional (1% of the total farms) and 402 (2,1 % of total organic farms) organic farms (sample size for 2002). The sample is for a bigger part composed of voluntary book-keeping farms as well as compulsory ones. As for conventional farms the sample is representative for farm types/size, product groups as well as regions. As for the sample organic farms it should be mentioned, that the sample is not representative, because the selection of farms is not harmonised with the types of organic farms in Austria. Although the DCPS gives clear indications about the economic development of organic farms.The system allows a direct comparison between organic and total farm data. The data collection is done permanently during the year, with a final analysis once a year. As for quality management besides computerised plausibility checks also visual checks by experts are conducted.

How are the results disseminated?

- The results are disseminated once a year in the overall agricultural report of the ministry of agriculture called “Grüner Bericht”. All data and analysis are also available on a web-page www.gruener-bericht.at. All information is openly available.

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is harmonized with FADN.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- In total for the DCPS as strengths were mentioned its representatives, its long running (since the 60ies) and its weighted results. As for organic farms the high number of involved farms as well as the possibility to weight the results were seen as special strengths.
- The steadily improvement (especially concerning the representatives of organic farms in the sample) was seen a plan for further development.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

- Yes, the DCPS is already well known and internationally standardised.

Production Statistics

In combination with the FADN ("Grüner Bericht"), which is conducted by the LBG, the same sample of 2264 total and 402 organic farms is used for a production statistics assessment. Production statistics are conducted by a representative sample with on farm questionnaires.
The DCPS is not harmonized to an international DCPS and gives indications on the value of production on organic farms. As for quality management computerized plausibility checks and expert checks. The dissemination of results is done yearly by the ministry of agriculture in the report "Grüner Bericht."

Price Statistics

In combination with the FADN ("Grüner Bericht"), which is conducted by the LBG, the same sample of 2264 total and 403 organic farms is used for a price statistics assessment. Price statistics are conducted by a representative sample with on farm questionnaires.

The DCPS is not harmonised to an international DCPS and gives indications on the average price level of producer prices on organic farms. As for quality management computerized plausibility checks and expert checks. The data on organic farming are not available openly and not included in a public report.

Agrarstrukturerhebung (Farm Structure Survey) Austria

The Farm Structure Survey in Austria is on important survey on agricultural statistics, which is conducted every 2 or 3 years as a representative sample and every 10 years as a full census. The DCPS provides information on the number of farms, the husbanded area, the allocation and size of animal stocks as well as the agricultural labour. The DCPS is conducted by the office of national statistics (Statistik Austria), the implementation and methodological coordination is done by EUROSTAT. Since 1990 organic farming is included into the DCPS.

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Name of the DCPS: Agrarstrukturerhebung
- Statistical scope: farm structure data
- Segmentation criteria: types/size of farms, husbanded area, production types, Grades of husbandry difficulties, main production areas

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- Yes, data on organic farms are included into the DCPS.

Does the DCPS promise relative valid and reliable results?

- The Farm Structure Survey is a total census done in strong cooperation with EUROSTAT, the methodological approach is also elaborated in strong cooperation with EUROSTAT;
- Although in the official report of the farm structure survey there is no data on organic farms included, it is possible to make a direct comparison between organic and a and total farm data. This kind of analysis is not done until now, but theoretical it would be possible.
- As for quality management a computerized plausibility check as well as expert check are used. The full census is conducted every 10 years, an update of the data is done by random samples every 2-3 years by the Statistic Austria.

How are the results disseminated?

- The results of the farms structure survey are available as a public report. Although data on organic farming are not represented in the survey, it is possible to get a special analysis on them, but not openly available.

How is the DCPS harmonised or related to other superior DCPS?

- The "Agrarstrukturerhebung" of the Statistic Austria is harmonized to the FFS. Methodology and implementation is done in close cooperation with EUROSTAT.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- Strengths: Total census of all farms in Austria every 10 years
- Weaknesses: Up-to- dateness of the data

INVEKOS (Integrated administration and control system)

The INVEKOS system is a data pool especially created for the execution and control of agricultural EU support measures. All relevant data are collected in cooperation with regional chambers and the Agrar Markt Austria, an organisation especially responsible for the administration and control of agricultural market regulation. As for the fact that in Austria about 95 % of all farms take part in the environmental programme ÖPUL (Austrian Programme for Environment and Agriculture) it is the mayor base for agricultural statistics on farm level in Austria. The data are administrated and analysed by the AMA.

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Name of the DCPS: INVEKOS
- Statistical scope: farm structure data
- Segmentation criteria: Farm type/size, product group/area, region

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS covers both organic and total data. As within the ÖPUL –program organic agriculture is on separate task, it is possible to analyse exactly the structure and size of the farm, the number of livestock (only for cattle);the

husbanded area concerning grassland/arable land as well as the planted product groups.

Does the DCPS promise relative valid and reliable results?

- The method of data collection is done as a yearly census through the analysis of the support applications of farmers, which take part in market regulation measures supported by the European Union. The collection of the applications is either done by the regional agricultural chambers or since 2002 online via a new installed system called EAMA. (www.eama.at). Besides structure and size of the farms also data on number of animals (only for cattle is) registered.
- All in all in 2003 155.600 farms are registered in the INVEKOS system, which means that 99% of the total arable land, 94% of total permanent grassland and 80 % of the total vine and orchards are covered. The missing percentage of farms is mainly due to the too small size of the farms (a minimum of 2 ha is required to participate in the program), so the significance of the DCPS is only partly shortened.
- As for supported organic farms in Austria, which makes about 98% of the total, the DCPS gives clear figures on the structure, production and animal number (only for cattle) of organic farms. The DCPS therefore allows a direct comparison of organic farms and the total.
- For quality management data are checked by computerised plausibility checks as well as expert checks. Data are collected in yearly frequency.

How are the results disseminated?

- Although the major part of the data is reported in the “Grüner Bericht” from the ministry of agriculture, data in general are not public. The database is mainly used for reporting EU-support measures and for national analysis by the authorized national institutions.

How is the DCPS harmonised or related to other superior DCPS?

- INVEKOS is based on the EU regulation 3508/92 and 3887/92 with the aim to administer and control agricultural EU-support measures.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- No information on that point available

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

- Yes, through the environmental support measures (with organic farming included) it is possible, to get very reliable data on the structure of nearly all of the organic farms up to date, with the possibility to observe yearly changes.

1.6.2 Consumer Level

ROLL AMA household panel

The ROLL AMA household panel is conducted by AC Nielsen AUSTRIA by order of the Agrar Markt Austria (www.ama.at).

Which types of data are collected?

- Name of the DCPS: ROLL-AMA
- Types of data, which are collected: penetration of products, consumer expenditures, consumption volume, purchase frequency
- Segmentation criteria which can be used:
  - socio-demographic criteria (age, family types, household income, education, sex)
  - spatial criteria (AC Nielsen regions),
  - product groups (fruits, vegetables, beef (incl.veal), pork, poultry, milk, milk products, cheese, eggs, oil
  - food retailers (distribution channels)

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS covers both organic sector data as well as total, a direct comparison between total and organic consumption is possible.

Does the DCPS promise relative valid and reliable results?

- Concerning the methodology a representative consumer household panel and a household dairy are used. Starting in 1998 4000 households had to report on their consumption behaviour every 8 weeks, since mid of 2002 the number of households was reduced to 1400 with a report delivered once a year. Out of this analysis an extrapolation is made for Austria.
- The sample of households is representative for all consumer households.
- As for quality management computerized plausibility checks are used.
- Data are updated 3 times a year.

How are the results disseminated?

- In general data are not available openly, except some very general data on distribution channels (only retailers) and purchased products, which are available as a report. Most of the data are confidential and used for internal marketing purposes.

How is the DCPS harmonised or related to other superior DCPS?

- No information available

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- Strengths: The DCPS gives a general overview on the organic market in AUSTRIA, although only retailer purchases are analysed. As strength is also seen that family types are included in the DCPS.

- Weaknesses: The DCPS does only include household purchases, without gastronomy.
- At the moment there are no plans for any improvement.

1.7 Conclusion

In general the demand for data on organic farming in Austria is quite high, especially in the field of marketed volumes and consumer demands.

Regarding the farm level data on organic farms in general are sufficiently available through the publications of the ministry of agriculture, where the main elaboration of data out of various DCPS takes place. Through the combination of different data sources and yearly up dates the data quality on farm level is reliable and sufficient.

Besides structural data on organic farms in Austria, the availability of data concerning all other actor levels necessarily has to be improved. Especially data on the market volumes, imports and exports as well as price statistics (on production level as well as on points of sale) are not availably until now. Although in the recent past there are some new approaches to gather import/export data and assess the national market volumes, it seems to be very difficult to combine the existing but confidential market data (organic producer associations, retailers, wholesalers, control bodies) to one coherent DCPS. The main reasons for that on one hand can be seen in the lack of interest from the official side responsible for statistics as well as the disinterest of relevant market partners to create a more transparent market situation.

In the restructuring process of all organic producer associations in Austria, which is taking place at the moment by building an overall producer association for organic farms called BIO AUSTRIA, it is planned to somehow consolidate data form the various control bodies to one major DCPS, which covers the main actor levels. Although these plans are still vague until now, there seems to be a strengthened interest from the ministries side to get better information on the market situation.

2 Belgium

Country Report

BELGIUM

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2.1 National relevance of organic farming

At the end of 2002 Belgium had a little more than 700 certified organic farmers. Together they represent about 25.000 hectares which represents about 1, 75% of the Belgium national agricultural area.
Belgium is divided in two parts: Flanders in the North en the Walloon region in the south. For a long time organic farming in the Walloon region was on a significant larger scale. More than 20.000 hectares of the organic area in Belgium is in the Walloon region. At this time the importance of organic farming is decreasing in the Walloon region and increasing in Flanders.
Most organic farms in the Flanders region practice rather intensive agriculture on very few hectares (vegetable and fruit crops).The implementation of the European subsidies for organic agriculture in 1994 and the lack of consumer confidence in the quality of agricultural products due to well-known crises (e.g. dioxin, BSE, OGM) are the decisive factors for the increasing number of conversions.

Illustration 2-1: Logos for organic products in Belgium

Since 1987, after the Biogarantie logo replaced former logos, the only logos for organic agriculture that are left in Belgium are Nature & Progrès and Biogarantie.

2.2 Structure of national statistic/data providers in agriculture

Main level	BIOFORUM (National) http://www.bioforum.be
Farmer level	BELBIOR (Flanders) info@belbior.be UAB (Walloon region) Union Nationale des Agrobiologistes Belges http://www.unab.be CLE/CLO/VOLT (Flanders) http://www2.vlaanderen.be/ned/sites/landbouw
Processor and Wholesaler level	BIOGARANTIE (Flanders) http://www.biogarantie.be PROBILA-UNITRAB (National) http://www.probila-unitrab.be

Consumer level	Nature Et Progrès (Walloon region) http://www.natpro.be VELT (Flanders) http://www.velt.be
Retail level	NAREDI http://www.naredi.be
Export level	AWEX (Agence Wallonne à l'Exportation) http://www.awex.be EXPORT VLAANDEREN http://www.export.vlaanderen.be
Information and Research	BLIVO vzw (Flanders) blivo@agris.be CARAB asbl (Walloon region) http://users.swing.be/carab/
Inspection bodies	BLIK http://www.blik.be ECOCERT BELGIUM http://www.ecocert.be
Promotion and information	VILT (Flanders) http://www.vilt.be VLAM (Flanders) http://www.vlam.be
Foods Safety	FAVV (Flanders) http://www.favv.fgov.be

2.3 Information about the surveyed institutions

As a part of the government, VOLT, for one thing, is involved in monitoring the biological sector. They evaluate government policies and study on impacts.

Within the agricultural sector they fulfil the role to report the effects of policies and there strategic cycles. On a country level Bioforum is also monitoring the biological sector on a farm level. Difference is that Bioforum is doing this for the total of Belgium. They both disseminate through internet.

For Belgium only VOLT returned a questionnaire with what they are covering the region of Flanders. This organization can be found through the portal that is mentioned above. They are capable to deliver information about the farm level with the variables area and number of farms. Also the segmentation of biological and in conversion is possible. This information is quick and easy obtained through the internet. As for the Walloon region it's very difficult to find data. Till now nothing could be obtained. Structure data that is mentioned in part 1 of this country report is obtained through the internet at the site of Bioforum. Although this information is covering the year 2002 and has therefore some delay, it implicates the possibilities to obtain data on at least the level of organic farming.

2.2.1 Consumer Associations

Nature and Progrès and VELT were originally associations of both consumers and farmers. Today VELT promotes organic agriculture for consumers and hobby gardeners. Nature and Progrès is not officially recognised as a producer association because consumers can be members as well. In fact, it also defends farmer's interests. The label Nature & Progrès is still used by a certain number of farmers (for direct marketing) and by many small organic shops.

2.2.2 Retailers Associations

NAREDI is the association of the retailers in organic foods and reform-shops.

2.2.3 Processors Associations

The processing firms are represented by Probila. This association informs its members, promotes organic products and represents its members' interests at ministries and in the BIOFORUM, who has replaced the former umbrella organisation Biogarantie.

2.4 Institutions which run "Organic DCPS"

For the Flanders region VOLT is covering the major figures. With the DCPS "Bio-indicatoren" they are capable of bringing in the searched variables on the farm level. Within the Walloon region things are much harder to find. On the level of Belgium it is possible to get some more information. Through the DCPS of NIS with the name Agricultural Statistics it's possible to get areas and number of farms for the whole country. But however things are rather late. For now, 2001 is the youngest period available. Other interesting sources seems to be the organizations: BLIVO vzw (Flanders), CARAB asbl (Walloon region), BLIK, ECOCERT BELGIUM, VILT (Flanders) and VLAM (Flanders).

2.5 Results of the second stage inquiry

The response of the second questionnaire was too poor to give a good image of the Belgium situation on the collection of organic agricultural data. The response of relevant parties is almost none.

The information about the surveyed institutions is equal to part 2.1 of this country report. See section 2.6 for the only known DCPS. Be aware that there should be other sources to collect organic data for the Belgium region.

2.6 Detailed information about DCPS, which include organic data collection

Farm level organic DCPS by VELT

The name of Volt's DCPS is Bio_indicators.xls. This DCPS covers Flanders, the Dutch speaking part of Belgium. This DCPS is started in 2000 as a monitoring instrument for the Rural Development Plans in which organic farming was included. The monitoring started on a policy and/or research demand. The scope is on a farm structural level with the following variables: Areas in hectares of organic farm structure, number of organic farms and the number of organic animals. It is possible to segment different types of data for product groups, several kinds of animals, and for regions into the Nuts level 2.

1. The data in this DCPS covers only the organic farm structure of the Dutch speaking part of Belgium and is used for statistic purposes only. It is also not possible to make a correct comparison between organic and total agricultural.
2. The used methods of collecting data is yet unknown.
3. There is a general and free of charge access to the data through Internet and through reports.
4. The DCPS is not harmonized because there is already another DCPS that should be harmonized. (No q2 available for that DCPS). Therefore there is no request to deliver harmonized data and on top of that the organizational effort is not provided at this moment.
5. No strength and weakness are mentioned.
6. This DCPS could be interesting because of the case study effect. Potential possibilities to create a two ways winning situation.

2.7 Conclusion

At this moment the only known DCPS is named Bio-indicators and it covers a DCPS about the organic farm level in the Flanders region. On a country level it's possible to find some late figures at Bioforum. For all other levels the appearance of a DCPS is unknown. Further investigation is therefore necessary to gather information about ways to find additional sources. The questionnaires did not produce the necessary information to find these sources but it is possible to use desk research and to contact relative parties

3 Bulgaria

Country Report

BULGARIA

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3.1 National relevance of organic farming

Basically the situation of agriculture in Bulgaria is more than worse. Due to the breakdown of communism in 1992 and the following “reconstruction phase”, farmland was given back to the original owners as far as possible. The rest was divided among the whole population, which now effects a very small-scale structure of farms with small and non interrelated parcels of land, which inevitably results in problems for land cultivation. It also effected that due to unclear property and the missing of a land reform about 30 % of the agricultural land lies idle. Unclear property conditions also make it nearly impossible for farmers to raise a credit for necessary investments, which stables the vicious circle.

Concerning organic agriculture the development in Bulgaria is still in its infancy. Although in 2001 two ordinances on organic farming according to EU-regulations were enacted by the government, until now an adequate implementation was not conducted. Positively mentionable is the establishment of an national certification body in 2003, which seems to be almost functioning.

The structure of organic farms as well as the one of conventional ones is quite small. Out of traditional reasons the main products are fruits and vegetables and herbs (both cultivated and wild) as well as honey and wild berries. Due to missing mechanisation organic cereal production is nearly unimportant. According to current estimations about 50 organic farmers husband an area of 500 ha. Not included in this data is the organic area certified by foreign certification bodies like SKAL, IMO and Biosuisse.

From a market perspective the domestic market for organic products is more or less not existent. Therefore almost the whole volume of certified products is exported as raw material mainly to the NL, CH, and Germany.

Table 3-1: Organic farming in Bulgaria

Number of organic farms	50
Organic area in ha	500 ha

3.2 Structure of national statistic/data providers agriculture

Table 3-2: Structure of surveyed institutions in Bulgaria – Type of Organisation

Type of Organisation						
	Governmental	Semi-Governmental	Non-Governmental	Private (non profit)	Privat (Profit)	***TOTAL***
Contacted	4	2		2		8
Responded	3			2		5
Overall response rate						62,5 %

Table 3-3: Structure of the surveyed institutions – Field of Activity

Field of Activity							
	Market research	Primary statist. DC	Secondary statist. DC	Public admin.	Certification	Research	Spec. interest group
Respond. (multiple entry possible)	1	1	1	1	1	3	2

3.3 Information about the surveyed institutions

3.3.1 Ministry of Agriculture and Forestry

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The Department of Agri-Statistics is a governmental organisation integrated in the Ministry of Agriculture and Forestry. The department is in strong cooperation with the National Statistical Institute responsible for primary statistical data collection as well as for tasks of public administration. Data are collected exclusively on farm level, including both crop and livestock products. Reports in general are available publicly and free of charge and published either via paper reports or the ministries homepage (http://www.mzgar.government.bg/). In cooperation with the department of Agri-environment (responsible person: Viara Stefanova) agricultural statistics are based on already harmonized DCPS including FADN, FSS, Supply Balance sheet as well as production statistics. Although data specifically on organic agriculture are not included until now, there are very concrete plans to integrate statistics on organic agriculture both in FADN, Production statistics and FSS with beginning in 2005.

3.3.2 National Statistical Institute

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The Department of Agricultural Statistics within the National Statistical Institute is a governmental organisation, which main purpose is to collect and analyse data on

agriculture in Bulgaria. Although until now not involved in data collection on organic production and markets the department reports on crop products, livestock products, non-alcoholic and alcoholic beverages as well as on processed and non food products. Concerning the covered market levels of data collection besides the farm level the whole production sector, processing, wholesalers, import/export, retailers as well as the consumer level is investigated. Results are prepared as reports, newsletters and for a smaller part publicly available on the website www.nsi.bg.

3.3.3 SGS Bulgaria

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SGS Bulgaria is the first (and until now the only) private national certification body in Bulgaria. Established in 2003 besides certification the organisation is also responsible for the collection of data concerning organic agriculture. Besides the farm level, where number and structure of farms is acquired, also data on import and export of organic products are collected in cooperation with foreign certification bodies. The control body is obliged to make the gathered data available for the ministry of agriculture and forestry.

3.3.4 Association Agrolink

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Voluntary efforts in the direction environmentally friendlier agriculture in Bulgaria have concluded in the creation of the Association of sustainable environmental solutions AGROLINK. The organisation was founded in the middle of 1999 by a team of agronomists, botanists, physicians, scientists and experts and farmers who have been involved in the related field with the aim to promote organic farming in Bulgaria. AGROLINK is also involved in projects concerning environmental legislation on organic agriculture. Concerning data collection on organic farming the organisation is running a DCPS on consumer level called COICOP.

3.4 Institutions which run “Organic DCPS”

Most important institutions:

- SGS Bulgaria
- Ministry of Agriculture and Forestry (Variables on organic farming are already included in FADN, FSS and Production Statistics so to say as a test, but the first reliable data will be not available before 2005)
- Agrolink Association

3.5 Results of the second stage inquiry

Table 3-4: Number of surveyed institutions/respond rate/respond structure

Number of contacted institutions	Number of Responses	Response rate	Respond structure
8	3	37,5 %	Ministry of Agriculture and Forestry SGS Bulgaria (certification body) Association Agrolink (special interest group)

Table 3-5: Overview about existing DCPS by actor level

DCPS	Institution	Actor level	Total	Organic
FADN	Ministry of Agriculture and Forestry	Farm level	X	(X) in 2005
FSS	Ministry of Agriculture and Forestry	Farm level	X	(X)in 2005
Supply Balance sheet	Ministry of Agriculture and Forestry	Farm level	X	
Production Statistics	Ministry of Agriculture and Forestry	Farm level	X	(X) in 2005
Farmers engaged in organic agriculture	SGS Bulgaria	Farm level		X
Processors engaged in organic agriculture	SGS Bulgaria	Wholesaler/ Processor		X
Exporters of organic products	SGS Bulgaria	Trade/Import/Export		X
COICOP	Association Agrolink	Consumer		X

3.6 Detailed information about DCPS, which include organic data collection

3.6.1 Farm Level

SGS Bulgaria- Farmers engaged in organic agriculture

The DCPS is hosted by the national certification body and includes only farms certified by this organisation. The data provided are similar to a farm structure survey including data on number of farms, size, animal numbers and product groups. As for the fact, that SGS Bulgaria was established as recently as 2003, the database is still in development. The collected data are reported to the ministry of agriculture and food and build the bases for statistics on organic farming in Bulgaria.

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Name of the DCPS: Farmers engaged in organic agriculture
- Statistical scope: farm structure data
- Segmentation criteria which can be used:
  - product groups: cereals, vegetables, fruit and berry, bovine animals, dairy products, honey
  - farm type/size

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS does only cover organic sector data (certification body).

Does the DCPS promise relative valid and reliable results?

- The data collection is done within the certification process as a census of all farms certified by SGS Bulgaria. Concerning the representativeness of the DCPS it can be mentioned, that besides farms/organisations, which are certified by foreign certification bodies, all organic farms in Bulgaria are included. The percentage of farms certified by SGS-Bulgaria in relation to the total number of organic farms could not be elicted, because the total number of organic farms is not available (due to the fact, that until 2003, all organic farms were certified by foreign certification bodies, which are not obliged to deliver any data to the responsible national authorities).
- The DCPS does not allow a direct comparison between organic farm data and total farm data.
- At the moment there are only visual checks by experts as quality management systems used, a software for adequate data storage and analysis is still in development. (The DCPS is still based on MS-EXEL sheets)
- The data are collected yearly in combination with the inspection process.

How are the results disseminated?

- Data are not openly available; only a yearly report has to be sent to the ministry of agriculture.

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is not harmonized to other superior DCPS. The aim of the DCPS is to provide data on the structure of organic farms to the Ministry of agriculture. No networking activities (e.g. with other certification bodies) were mentioned.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- Strengths: The range of the DCPS covers the major part of organic farms in Bulgaria
  Weaknesses: The system of data storage and analysis is still done with excel sheets.
- Particularly the development of an adequate software solution for easier data management was mentioned as a challenge for the next year. Also, in preparation to the possible accession to the EU in 2007 the harmonisation of the DCPS to the requests of the EU is planned.

SGS-Bulgaria- Production Statistics

The DCPS is hosted by the national certification body SGS-Bulgaria.

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Specific name of the DCPS: production statistics
- Statistical scope: production statistics
- Segmentation criteria which can be used:
  - product groups: cereals and protein crops, vegetables, fruit and nuts, oil seeds and oleaginous plants, beverages and spice crops, sheep and goats

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS does only cover organic sector data.

Does the DCPS promise relative valid and reliable results?

- The data collection is done with questionnaire on farm level for farms certified by SGS-Bulgaria. The data collection is done as a census (with the clients of SGS).The percentage of the organic farms covered by this DCPS is not elictable, because the total number of organic farms in Bulgaria is not acquired yet.
- As quality management system visual checks by experts are used, the data collection in done yearly in combination with the individual certification procedure.

How are the results disseminated?

- Data are not openly available; A report on production statistics is sent to the ministry of agriculture.

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is not harmonised or related to other superior DCPS, because until know due to the negligible number of organic farms in Bulgaria there was no administrative or political need for reporting on organic farming. Also internationally the request for data was not existent.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- Strengths: The DCPS provides some indicative data on the production of organic goods in Bulgaria.
- Weaknesses: The system of data storage and analysis is still done with excel sheets.
- Particularly the development of an adequate software solution for easier data management was mentioned as a challenge for the next year.

3.6.2 Wholesaler / Processor Level

SGS Bulgaria: Processors engaged in organic farming

Which types of data are collected relating to different levels in the supply chain?

- Specific name of the DCPS: Processors engaged in organic farming
- Statistical scope which is related to the DCPS: food processing
- The segmentation criteria: size, important markets

At which level are data collected?

- Data are collected on the level of processing industry, farmers and control institutions.
- The product groups covered are: Bread and cereals, Fruit and fruit products, Vegetables and vegetable products, sheep and goat, milk/products, herbs, baby foods

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS covers only organic data.

Does the DCPS promise relative valid and reliable results?

- Due to the fact that only SGS clients are included the DCPS is not based on a representative sample of organic food processors in Bulgaria. The data collection is done as a census, with weekly (?) data collection.
- There was no information available, which percentage of the total organic processors in Bulgaria is covered by the DCPS.
- The DCPS does not allow a direct comparison between organic product and total product data
- The data quality management is done by visual expert checks.

How are the results disseminated?

- The results are summarised in a report, which is not openly available.

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is not harmonised or related to other superior DCPS. Until now the lack of demand for this data, either national or international, and the small relevance of organic farming in Bulgaria did not foster an adequate development of statistical data collection.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist ?

- Strengths: The DCPS provides some indicative data on the number of organic processors in Bulgaria.
- Weaknesses: The system of data storage and analysis is still done with excel sheets.
- Particularly the development of an adequate software solution for easier data management was mentioned as a challenge for the next year.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

- No, the sample is neither representative nor complete.

3.6.3 Import / Export Level

SGS BULGARIA –Export/Import of organic products

Which statistical scopes are covered by the DCPS and which differentiation does the data set allow?

- Specific name of the DCPS: Export/Import of organic products
- The DCPS is used for imports as well as for exports of organic products
- The data collection concentrates on EU trade as well as on third country trade.
- Segmentation criteria: product, product group, country of origin, country of destination

At which level are data collected?

- Data are collected on the level of ports and borders, farmers organizations and processors and packers.

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS does only cover organic sector data (certification body)

Does the DCPS promise relative valid and reliable results?

- The questionnaire indicates, that the data are collected in the course of the certification process of the own clients as well as in cooperation with other certification bodies and NGOs acting in the country. There is no information available, how the data collection is done in detail. Therefore the DCPS can not be seen representative for the whole import/export sector.
- There was no information available. what percentage of import / export volumes is represented in the sample.
- The DCPS does not alllows a direct comparison between organic product and total data.
- As for quality management systems a visual check by experts is used.

- The data collection is done permanently, this means, in the course of certification.

How are the results disseminated?

- The results are provided as a report, which is to a bigger part is available openly, although some information is kept confidential.

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is not harmonized to a international/superior DCPS. Definition of product groups is not harmonized to EUROSTAT or FAO and therefore there are no data provided to international DCPS. Also within the country no networking activities were reported.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- Strengths: The DCPS provides some indicative data on the volume of organic imports/exports in Bulgaria.
- Weaknesses: The system of data storage and analysis is still done with excel sheets.
- Particularly the development of an adequate software solution for easier data management was mentioned as a challenge for the next year.

3.6.4 Consumer Level

Association AGROLINK: COICOP

Which types of data are collected?

- Specific name of the DCPS: COICOP

- The types of data, which are collected: penetration of products, consumer expenditures, purchase frequency,
- Segmentation criteria
  - Buying behaviour: purchase frequency, choice of sales channel
  - Socio-demographic criteria: Age groups, Family types, Household income, Education level, Gender, Occupation
  - Differentiation by product groups possible; product groups included: Bread and cereals, Fruits, Vegetables, Beef (incl. Veal), Sheep and goat, Pork, Poultry, Fish and fishery products, Milk, milk products, Cheese, Eggs, Edible fat and oil, Sugar, jam, honey, chocolate and sweets, Sauces, salt, herbs, soups and others, Coffee, tea, cocoa, water, lemonade, juice, Baby foods

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS does only cover organic data. As reason for establishing the DCPS in 1997 was mentioned research demand.

Does the DCPS promise relative valid and reliable results?

- The DCPS is based on a representative sample of the population; There was information available, for what currently the DCPS is representative or which percentage of the total population is covered. As methodology for data collection a consumer survey as well as a retailer survey is used.
- The DCPS does not allow a direct comparison between organic product and total product data.
- There was no data quality management indicated for the DCPS
- Data are collected at least once per year.

How are the results disseminated?

- The results of the DCPS in general are openly available, with some exceptions. The dissemination is done in form of a report. As most relevant publication the "Opportunity for local organic market in Bulgaria" published by National Forum Ecotourism was mentioned.

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is harmonised to the international standards of the COIOP database, although the moment there is neither a data supply on national nor international level.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- There was no information on this task.

3.7 Conclusion

In general the importance of organic farming and therefore the necessity for statistical analyses was more or less not existent. As organic farming is seen a realistic chance (especially for export) for the further development of agriculture in Bulgaria, it getting more and more important to develop also statistical systems In preparation for the accession to the EU in 2007 the Ministry of Agriculture has seen the necessity to deal with the topic and integrated the variables on organic farming into already existing DCPS like FADN, FSS and Production statistics with first results available in 2005. With the establishment of the first national certification body SGS Bulgaria in 2003 for the first time there are some more reliable data on farm level available.

The major focus in the development of adequate DCPS is first of all seen on farm level, all other levels will continuously be developed by SGS Bulgaria. The most difficult task for sure will be the integration of data from foreign control bodies, which, until 2003, certified all of the organic farms in Bulgaria.

4 Cyprus

Country Report

CYPRUS

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4.1 National relevance of organic farming

Only recently organic agriculture has been introduced in Cyprus. It started in 1988 with two farmers involved in the production of several kinds of vegetables, including potatoes, cereals and livestock products (dairy products, meat). The farm size was approximately 3 hectares, and only a small part of the land was irrigated. In general, the whole production, processing, packaging and labelling systems used were in line with IFOAM's basic standards. Their production was sold locally. Distribution and marketing problems were faced. During the 1990s, the area of land under organic management as well as the number of farmers increased, although at a slow rate. New products have been added to the list of organic products, such as dessert grapes, carob, wine, herbs, pulses and others.

In 1999, there were 13 hectares and 15 farms under organic management, whereas in 2002 there were 45 farms which represent 0.009% of the total number of agricultural farms and 166 hectares (0.12% of total land). With the exception of one dessert grape farm and one vineyard, each of the other farms are less than 0.5 hectares in size. Apart from the Cyprus Organic Producers Association, which was founded in early 2000,there are no organic agriculture organisations so far, and no country logos are used for organic produce.

4.2 Structure of national statistic / data providers in agriculture

An introductory questionnaire was sent to the Ministry of Agriculture, Natural Resources and Environment, Department of Agriculture and to the Lacon GmbH Cyprus but they did not reply.

4.3 Conclusion

We do not have any information about data collection.

5 Czech Republic

Country Report:

CZECH REPUBLIC

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5.1 Brief introduction about the national relevance of organic farming

In general the importance of the agricultural sector in the Czech Republic measured with economic indicators can be compared with the EU states. The share of agriculture in the gross domestic product is about two percent and declining.

In 2002 the agricultural area of the Czech Republic was about 4.3 million hectares and more than 5 % was organic. About 90 % of the organic farm land was permanent grassland and 8 % was arable land. 157.360 hectares (473 farms) were registered and 77.776 hectares (244 farms) were in conversion. The 235.136 ha were farmed by 717 farmers (Table 5-1). Besides this, 92 producers and 146 distributors were registered (Table 5-2).

The Ministry of Agriculture introduced an agri-environmental programme, including direct support for organic farming, which started in 1998. The system is based on points for each organically farmed hectare (including land in conversion). This policy has resulted in a great increase in organically cultivated land since 1998.

More than 400 agricultural enterprises are members of PRO-BIO. It is the greatest national non-governmental organization associating organic farmers, processors, traders and consumers founded in 1990. PRO-BIO is a member of IFOAM and a partner of Bioland in Germany.

KEZ is the national certification and inspection body founded in 1998. Since 1 April 1999 KEZ has been authorised to carry out the organic farming control in the Czech Republic. KEZ has fulfilled all requirements for accreditation at IFOAM since February 2003. The Czech Republic has been on the equivalence list of third countries according to the EC Reg. 2092/91 since 4 February 2000. In the year 2002 425 certificates for exports which are almost 3.579 tons were granted. In 2002 the highest amount was exported to Germany (2.171 tons). In 2003 the total amount increased to 9.254 tons and 911 certificates. Most of it is exported to Austria (6.304 tons). There are very few organic imports, and these are mainly from EU member states. Concerning domestic market conditions the main part of the products is sold as conventional without being labelled. (Literature: http://www.organic-europe.net/country_reports/pdf/2000/czech_republic.pdf, www.kez.cz (annual reports 2002/2003))

Table 5-1: Organic farming in the Czech Republic (2002)

	Year 2002
Number of organic farms	717
Registered	473
Applicant	244
Organic area in ha	235.136

Source: Annual report of KEZ

Table 5-2: Number of companies registered for organic farming (2002)

	Year 2002
Organic farms	717
Organic Producers	92
Organic Distributor	164
Total	973

Source: Annual report of KEZ

5.2 Structure of national statistic/data providers in agriculture

Table 5-3 shows that 13 institutions were contacted and 5 filled in the first questionnaire. The overall response rate is about 38 %. 50 % of the contacted persons in governmental and semi-governmental institutions responded but only 28 % of the contacted persons of private institutions or enterprises.

Table 5-3: Structure of surveyed institutions in Czech Republic

Type of Organisation						
	Governmental	Semi-Governmental	Non-Governmental	Private (non profit)	Privat (Profit)	TOTAL
Contacted	4	2			7	13
Responded	2	1			2	5
Overall response rate						38 %

Source: Own calculations

Table 5-4 gives an overview about the main functions of the institutions which responded. It shows that a wide range of functions from statistical data collection to research and education is represented by the institutions which have responded.

Table 5-4: Main function of the institutions which responded

Main function of the institution which responded (Multiple answers possible)	Number of institutions
Market research/intelligence (qualitative/quantitative)	1
Primary statistical data collection	1
Secondary statistical data collection	1
Public administration	1
Certification	1
Research	2
Education	2
Specialist interest group	2
Media	1

Source: Own calcultaions

5.3 Information about the surveyed institutions

5.3.1 Statistical Office of the Czech Republic

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The Statistical Office of the Czech Republic is public founded. It is the main institution for data colletion and processing. It is a governmental institution. In addition to linking and harmonising the statistical system, its most important tasks are international co-operation, determination of methodological and classification standards, anticipation of users' needs, collection, processing and dissemination of data. Until now data on organic agriculture is only limitedly available and is collected by the Department of Agricultural, Forestry and Environmantal Statistics in co-operation with the Ministy or Agriculture to fulfill the requirements of Eurostat. The DCPS for Farm Accoutancy data network is prepared with the Research Institute of Agricultural Economics. The DCPS for Price statistics is administered at the Department of Price Statistics.

5.3.2 Ministry of Agriculture

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The Ministry of Agriculture together with the Czech Statistical Office are the main institutions collecting organic production and market data. It is financed by a state budget. Data collection and dissemination are important with respect to statistical data but not the major task of the Ministry of Agriculture. Data of all product groups for all levels with the exception of the consumer level are collected, processed and disseminated. Organic data collection is organised in a separate department. The information is disseminated in e-mail newsletters, websites and reports. The reports are available publicly and free of charge. Further details about data collection and processing are not available because the second questionnaire was not filled in.

5.3.3 KEZ

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KEZ is the national certification and inspection body founded in 1998. Since 1 April 1999 KEZ has been authorised to carry out the organic farming control in the Czech Republic. Data collection is the major focus with respect to statistical data but not the major task of KEZ. Organic production and market data is organised in a separate department. Organic data of several product groups (crop products, livestock products, non-alcoholic and alcoholic beverages, processed products, non-food products and feeding stuff) are collected on the farm level, the whole production sector and on the wholesaler level. The information is disseminated in newsletters and websites and is available publicly and free of charge. Further details about data collection and processing are not available because the second questionnaire was not filled in.

5.3.4 PRO-BIO

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It is the largest national non-governmental organisation associating organic farmers, processors, traders and consumers. PRO-BIO provides complex services to its members: it assists them in the process of transition from conventional to ecological farming, helps them solve their technical as well as administrative problems, and supports the sales and promotion of organic products. The Association participates in organising educational programmes and defends its members' interests when dealing with inspection authorities and state administration bodies. PRO-BIO is represented by regional centres covering the whole territory of the Czech Republic. PRO-BIO has 500 members, of which 400 are agricultural enterprises cultivating 115,000 hectares of farmland. PRO-BIO is a member of the international organisation IFOAM and a partner of "Bioland", the German association of ecological farmers. Data is collected mainly for administrative use. Details about data

processing and dissemination are not available because only one person has described a small project done for PRO-BIO where data of 40 specialised health shops on a retailer level were collected.

5.3.5 Other institutions

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Ladislav Hanus has been collecting data about import and export notifications of organic products for the Pro-Bio report. This has been done since 1990. Further details about the data collection and processing are not available.

5.4 Institutions which run "Organic DCPS"

The following list gives an overview about the Institutions which run an organic DCPS:

- Statistical Office of the Czech Republic
- KEZ, mainly for administrative use
- PRO-BIO, mainly for administrative use
- Ministry of Agriculture
- Mendel University of Brno, for research

5.5 Results of the second stage inquiry

The results of the second questionnaire are given in Table 5-5. 3 institutions filled in the second questionnaire. The response rate is 60 %.

Table 5-5: Number of surveyed institutions/response rate/response structure Czech Republic

Number of contacted institutions	Number of responses	Response rate	Response structure
5	3	60 %	Minstry of Agricultural Statistics Mendel University of Brno (only little information) Pro-Bio (not representative)

Source: Own calculations

Table 5-6 gives an overview about existing DCPSs by actor level. Most of the DCPS are managed by the Department of Agricultural Statistics in co-operation with the Ministry of Agriculture which is responsible for the DCPS Farm Structure Survey (FSS), production statistics and supply balance sheets. Organic data collection exists at the Ministry of Agriculture.

Table 5-6: Overview about existing DCPS by actor level

DCPS	Institution	Actor level	Total	Organic
FSS	Statistical Office (Dept. of Agricultural Statistics) in co-operation with the Ministry of Agriculture	Farm level	X	X
Production statistics	Statistical Office (Dept. of Agricultural Statistics) in cooperation with the Ministry of Agriculture	Farm level	X	
Supply balance sheet	Statistical Office (Dept. of Agricultural Statistics) in cooperation with the Ministry of Agriculture	Farm level	X	
Adminstrative Data	Consultant for Pro-Bio	Retailer level		X
Administrative Data	Mendel University for Pro-Bio	Trade		X

5.6 Detailed information about DCPS, which include organic data collection

5.6.1 Farm Level

Czech Statistical Office of Agricultural Statistics, Dagmar Binova

This Data Collecting and Processing System (DCPS) is a Farm Structure Survey and was started in 2000. The statistical scope is farm structure data segmented to farm type and size. The DCPS covers total data and includes variables so that organic farms can be identified. 80 % of the organic area and almost 65 % of the organic farmers are represented. Because the definition of organic farming however was not exact, there might have been the problem of over-estimation of organic farming. Computerised plausibility and visual checks by experts are used as instruments for the data quality management. This DCPS is harmonised to EUROSTAT and its requirements. In accordance to EUROSTAT a national census approach is used. The data is collected every 2-3 years. The data are disseminated via Internet, CD ROM and on Agrocensus 2000. The strength of this DCPS is that a revised farm register exists. The long time demanding is a weakness. With regard to the organic area, the organic data are not separated and compared with data of conventional farms because there was no exact definition of organic farming. In future it has been planned to include specialised codes for organic farms in the farm register so that the recording of organic farms can be separated. At the moment this DCPS cannot be taken as a positive reference for a case study because until now organic data cannot be separated from conventional data. But if it is developed this will be a positive case study.

5.6.2 Retailer Level

PRO-BIO, Tom Vaclavik

This DCPS started in 2003 and focuses on research among PRO-BIO members and on a retailer level. The sales of retailer, national consumer prices and market shares of organic products in relation to total sales have been collected. It is not possible to segment the different types of data. The data collected is not representative because only 0.01 % of the total population of the retail sector is represented. The data collection covers only about 40 specialised health food shops selling organic food which are members of PRO-BIO. A questionnaire is used for data collection and the data is collected at least once per year. No quality management is used and there is no comparison possible between organic and total data. This DCPS is not harmonised or related to other superior DCPS. Some data are confidential and most are available free of charge. The main strength of this DCPS is the close contact with retailers. One important weakness is the lack of methodology for data collection and management. Because of limited funds a more fundamental data collection is not possible. At the moment this DCPS cannot be taken as a positive reference for a case study because it is not representative but maybe it can be developed and on the basis of a representative data basis it can be a positive case study.

5.7 Conclusion

In general the availability of data concerning organic agriculture is not good because of limited resources of the main data collecting and processing institutions. The Statistical Office of the Czech Republic and the Ministry of Agriculture are collecting data in accordance with the EU needs. The Ministry of Agriculture did not fill in the second questionnaire, so that the information about data collection and processing is limited. Besides PRO-BIO and KEZ are collecting data for their administrative use. At least some departments at the universities and private enterprises are collecting data for research or doing it for PRO-BIO. Although organic farming has made a rapid development since 1998, the official side will not provide people with a good database about organic data because of limited resources. Concerning the data quality it is not possible to make a statement due to lack of information.

6 Denmark

Country Report

DENMARK

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6.1 National relevance of organic farming

According to the Plant Directorate, which certifies and controls all organic farms in Denmark, there were in 2002 3714 organic farms with a total production area of 178.360 ha of which, 148.301 ha were certified organic and 26.049 ha were in conversion (1st and 2nd year). In Table 6-1 some key statistical figures for organic agriculture are presented http://www.pdir.dk/Files/Filer/Oekologi/Statistik/02/Statistik_2002.doc.

Table 6-1: Number and area of organic farms in Denmark in year 2002.

	Organic farms		All farms[1)]
	Total	In % of all farms	
Number of farms	3714	7,3	50.531
Total production area, ha	178.360	6,7	2.665.507
Certified organic area, ha	148.301	5,6	
Total production area per farm, ha	48,0		52,7

1) Statistics Denmark, Agricultural Statistics 2002

The former rise in conversion to organic farming peaked in 2002 and in 2003 more organic farmers returned to conventional farming than conventional farmers converted to organic farming. According to the Ministry for Food, Agriculture and Fisheries electronic newsletter, Externt Forum no. 15 there are in 2004 2965 organic farmers, who are subsidized for farming 156.618 ha of land.

In 2002 over 41 % of all organic farms were cattle farms (mainly dairy herds), which is a considerably higher figure than for conventional farms. The opposite is the case for pig producing farms. In table 6-2 is presented an overview of organic farms classified according to type of animal production (News from Statistics Denmark, No. 204, May 12, 2003).

Table 6-2: Organic farms classified according to type of production.

	Organic farms	All farms	Organic farms	All farms	% of all farms
	No.		%		
Total	3.594	50.531	100	100	7
Cattle farms	1.485	12.511	41	25	12
Pig farms	103	7.714	3	15	1
Poultry	109	384	3	1	28
Other animal farms	512	1.778	14	4	29
Arable farms[1)]	1.385	28.144	39	56	5

1) Arable farms defined as farms with less than 0,5 Animal Unit per ha.
2) Source: the Danish Plant Directorate.

The Danish Plant Directorate also certifies and controls companies marketing certified organic feedstuffs, fertilizers, plant protection products, seed and propagation materials.

Companies processing and marketing organic food products are certified and controlled by the Danish Veterinary and Food Administration. In 2002 there were 238 retailers and 418 wholesalers (totally: 656 marketing organic food products), which were controlled according to the Regulation on marketing of organic products. Compared to 2001 the number of controlled retailers has decreased by 12 % while the number of controlled wholesalers has increased by 6 % resulting in a total decrease of 1 % for firms processing and marketing organic products in 2002 (the Danish Veterinary and Food Directorate, 2003). In table 6-3 is shown the development in market share for some of the most important organic products in the period 1999 – 2002.

Table 6-3: Market share in Denmark of some important organic products.

Product	Market share in %	
	1999	2002
Fresh milk	21	24
Full-milk products	8	5
Eggs	18	17
Meat	< 1	< 1
Wheat flour	11	8
Rolled oats	25	27
Dark (rye) bread	8	5
Carrots	15	13

Source: GfK / Organic Denmark, April 2003.

At the moment there is an overproduction of organic food and feed products. Besides, the import of organic feed and food increases the competition on the Danish market resulting in lower prices and lower income to the Danish organic farmers.

The organic products are mainly marketed in Denmark, and the annual export of organic food products is small, about 30 million EURO compared to 7.640 mill EURO for the total Danish agricultural export in 2002. The export of organic products corresponds to about 10 % of the value of the sale on the home market, which has been rather constant in recent years. The most important export markets are the UK, Germany and Sweden. However, in 2002 the export to the British market fell by almost 50 % due to the British consumers preference for British produced organic products. The most important organic food products for export are dairy products (about 1/3) followed by meat products (Oekologisk Landsforening, 2003) http://www.alt-om-okologi.dk/distribution/eksport.htm.

6.2 Structure of national statistic/data providers in agriculture

The EISfOM introductory questionnaire was sent out to 13 public and private institutions in Denmark collecting and/or processing statistical data on organic agriculture and food products on a regular or irregular basis. 8 institutions (61,5 %) returned the filled in introductory questionnaire. 5 of these were governmental

institutions while the rest were private non-profit and for profit institutions. An overview of the respondents is presented in table 6-4.

Table 6-4: Overview of date collecting and/or processing Danish organizations, which returned the introductionary EISfOM questionnaire.

Name:	Type of organization	Level of data collection	Collection of "organic" data separately?
Statistics Denmark (DS) http://www.dst.dk/HomeUK.aspx	Governmental data collection and processing	Farm level Processing / input manufacture Wholesaler Retailer Import/export	Yes, secondary and primary data collector of organic and conventional data on farm level Retailer prices on certain organic food products
The Danish Plant Directorate http://www.pdir.dk/Default.asp?ID=2228	Governmental certifier and inspection body for control of organic farms and input manufacturers	Farm level Processing / input manufacture Trade (import)	Yes, primary data source for organic data on farm level. Primary data collector for registered processors and manufacturers of organic feedstuffs, fertilizers, plant protection products, seed and plant propagation materials
The Danish Veterinary and Food Administration http://www.uk.foedevaredirektoratet.dk/forside.htm	Governmental certifier and inspection body for control of wholesalers, retailers and importers	Processing / input manufacture Wholesale / distribution Trade (import) Retail	Yes, on number of organic processors, wholesalers and retailers covered by "organic" inspection; Organic egg laying hens and eggs
Danish Research Institute of Food Economics http://www.foi.dk/engelsk/index.htm	Governmental research institute	Farm level: Crop and animal production (dairy), Profit and loss account	Yes, crop and animal production plus profit and loss account for organic farms and conventional farms.
Department of Manufacturing, engineering and Management, Technical University of Denmark http://www.ipl.dtu.dk/index/gb/	Governmental research institute	Mainly processing, marketing and consumer	Yes, for specific research projects
Organic Denmark http://www.organic-denmark.com/	Private non-profit organic interest group	Farm level, Processing / input manufacture, Wholesale /distribution, Trade (import/export), Retail, Consumer, Policy	Yes, only organic data, Market surveys, Policy issues, export
Department of Organic Farming, Danish Agricultural Advisory Service, National Centre http://www.lr.dk/applikationer/kate/viskategori.asp?ID=lr00300002000010000301	Private, farmer owned non-profit consultancy company	Processing /input manufacture Wholesale /distribution	Yes, organic seed and propagation materials, certain crop and animal product prices
Institut for Konjunktur-Analyse (IFKA) http://www.ifka.dk/english/	Private for profit market researcher	Consumer	Yes, organic crop and livestock products, processed products and non-food products

Besides the responding organisations there are the following institutions, which collect or process organic data.

Table 6-5: Other relevant "organic" data collecting and / or processing organisations in Denmark

Name:	Type of organization	Level of data collection	Collection of "organic" data separately?
Centralt Husdyrbrugs Register (Central Livestock Register) CHR http://www.fvm.lec.dk/pls/chr/chr$.menu	Governmental register	Farm level Processing	Yes, organic beef cattle, slaughtered organic cattle
The Danish Dairy Board	Private NGO, dairy interest group	Farm level Processing	Yes, delivery of organic milk to the dairies and sale of milk, butter and cheese
MAPP Centre, Aarhus Business School http://www.asb.dk/centres/mapp/default.htm	Governmental research institution	Mainly marketing and consumer	Yes, in specific research projects.
GfK http://www.gfk.dk	Private for profit market researcher	Consumer	Analysis of consumer panel of 2000 households as regards their buying habits concerning organic products. Collection of data on sale of organic food products on domestic markets http://www.organic-denmark.com/ramme/danish-organic.asp?side=2
A.C. Nielsen http://www.acnielsen.aim.dk/	Private for profit market researcher	Retailer	Yes, sale of organic products in supermarket chains based on Scan Track data. From 2003 several of the largest super market chains have withdrawn from the survey
Institute of Local Government Studies http://www.akf.dk/index_eng.html	Public independent research institution	Consumer, but other levels may also be relevant	Yes, for specific research projects, e.g. consumer attitudes

6.3 Information about the surveyed institutions

6.3.1 Statistics Denmark http://www.dst.dk/HomeUK.aspx

Statistics Denmark under the Ministry of Economics, is the government agency responsible for collection, checking, processing and dissemination of statistical data in Denmark and for collaboration on statistical matters internationally. Agricultural and horticultural statistics on farms, areas, production etc. is published every year in the Agricultural and horticultural survey report, which include Farm Structure Survey (FSS) and Farm Accountancy Data Network (FADN) data and data on organic farming. The information is based mainly on questionnaires which are sent out to all farmers with more than 0,5 ha of land, and which are mandatory to fill in and return to Statistics Denmark. Besides, the survey is based on secondary statistical data collection from other sources (see below). Since 2001 Statistics Denmark has also collected and published consumer prices for eight selected organic products (whole

milk, 0,5 % fat milk, skimmed milk, eggs, size L, carrots, potatoes, minched beef and minched pork with max. 12 % fat) on a monthly basis. At present Statistics Denmark carries out data collections that specifically cover the organic sector only to a limited degree. An overview of the data collected on agriculture can be found in the Statistical Yearbook 2003: http://www.dst.dk/HomeUK/Statistics/Publications/Yearbook/2003.aspx (see under "Agriculture"). Statistics Denmark also produces quarterly detailed surveys in manufacturing industries and bi-monthly surveys in retailers on sales in value and volume, but these surveys do not distinguish between conventional and organic products. Besides, monthly surveys on foreign trade are carried out, but they do not differentiate between conventional and organic products.

In 2001 the Directorate for Food, Fisheries and Agribusiness asked Danish statistics to carry out an analysis for a critical examination of user needs, mapping of existing data capture and recommendations for new potential data collections within organic farming, processing and consumption. Mr. Poul Henning Larsen from Danish Statistics has been responsible for this work, and in 2003 two reports were published (in Danish). The first gives a brief data needs assessment and a detailed mapping of existing data capture possibilities plus proposals for new statistics within the organic sector. The second report contains detailed statistical models for selected domains as proposed in the first report. Mr. Poul Henning Larsen presented the paper, “Statistics on organic Farming and organic products in Denmark” based on these reports at the EISfOM seminar in Berlin, April 26-28, 2004.

These investigations will be followed up on these investigations by carrying out a survey in 2004 on turnover in 2003 of organic products from retailer shops (3 of the largest super market chains in Denmark). Besides, the information of the Danish Plant Directorate on certified companies marketing organic feedstuffs, fertilisers, plant products, seeds and plant propagation materials and the information from the Danish veterinary and Food Administration on processors, packers, wholesalers and retailers will be matched with the information on foreign trade from Statistics Denmark for the year 2004 in order to calculate the share of organic products involved in the foreign trade. Mr. Poul Henning Larsen is responsible for this study.

6.3.2 *Danish Plant Directorate* http://www.pdir.dk/Default.asp?ID=2228

The Danish Plant Directorate is a governmental agency under the Ministry of Food, Agriculture and Fisheries. Among other things it is responsible for the certification and control of all organic farms and wholesalers and retailers (117 in March 2004) dealing with certified organic feedstuffs, fertilisers, plant protection products and/or seed and plant propagation materials, and for the control of the EU agricultural subsidy schemes. The Danish Plant Directorate is responsible for yearly collection of statistical information from all certified organic farms. The Questionnaire contains information on areas of various crops in ha at a two digit level. For each crop it is indicated whether the area is fully converted, partly converted (conversion year 1 or 2) or not yet converted (conventional). For husbandry farms the information also covers the actual number and production of animals for the various animal species and types of production.

The Danish Plant Directorate is also responsible for the data in the database on organic seed and plant propagation materials, which it has been mandatory to establish and maintain for all member states since January 2004 according to the Commission Regulation (EC) No 1452/2003 of 14 August 2003 maintaining the derogation provided for in Article 6(3)(a) of Council Regulation (EEC) No 2092/91 with regard to certain species of seed and vegetative propagating material and laying down procedural rules and criteria relating to that derogation. The database is hosted by the Department of Organic Farming, Danish Agricultural Advisory Service, National Centre (see below).

6.3.3 Danish Veterinary and Food Administration
http://www.uk.foedevaredirektoratet.dk/forside.htm

The Danish Veterinary and Food Administration is a governmental agency under the Ministry of Food, Agriculture and Fisheries. Among other things it is responsible for the certification and control of all processors, wholesalers, retailers and catering centres dealing with organic food products (656 end of 2002) plus control of imports of food products from third countries (outside the EU). The Danish Veterinary and Food Administration collects statistical information on the number of registered and controlled processors, wholesalers and retailers, but no information from the individual companies on e.g. type and size of production, financial turnover etc. is collected. However, information on sales in kg. of organic and conventional eggs for consumption are collected and delivered to Statistics Denmark on a quarterly basis.

6.3.4 Central Livestock Register **http://www.glr-chr.dk/pls/chr/chr$.menu**

The Central Livestock Register is placed under the Danish Veterinary and Food Administrtion. It contains information on the various types of livestock on the farms. The information on cattle is very reliable and it should be possible to discriminate between organic and non-organic animals, but until now such data have not been available from the register. However, it is at present possible to identify the number of slaughtered organic cattle, including the weight of the animals. The data on other animal species are less reliable.

6.3.5 Danish Research Institute of Food Economics
http://www.sjfi.dk/engelsk/index.htm

Since 1997 the Danish Research Institute of Food Economics has produced a yearly accounts statistics for organic agriculture (with English summary and translation of words used in the table texts) as paparts. The accounts statistics are based on a representative sample of about 13 % of the total Danish organic farms. The survey gives very detailed information on input and output, labour consumption profit and loss accounts for organic and conventional farms compared to conventinal farms.

6.3.6 Department of Organic Farming, Danish Agricultural Advisory Service, National Centre

http://www.lr.dk/applikationer/kate/viskategori.asp?ID=lr00300002000010000301

Department of Organic Farming, Danish Agricultural Advisory Service, in collaboration with the Danish Plant Directorate, hosts the online database, where suppliers of seed can register seed and seed potatoes, produced by the organic production method, which they want to put on the market: http://www.lr.dk/applikationer/oekosortsdb/index.asp .

6.3.7 Other Institutions regulary collecting organic data:

- ***The Danish Dairy Board*** collects data on volumes of organic and conventional milk delivered to Danish dairies and volumes of milk, butter and cheese sold from Danish dairies on a quarterly basis.

- ***Organic Denmark*** (Non-govenmental organization for farmers, producers and consumers) has over the last years carried out a survey on export of certified organic products. The population of this survey is the processors, wholesalers and retailers certified by the Danish Veterinary and Food Administration and the the survey contains 16 categories of food. http://www.organic-denmark.com/ramme/danish-organic.asp?side=2. Organic Denmark also collects some information on consumer behaviour http://www.organic-denmark.com/ramme/danish-organic.htm.

6.4 Results of the second stage inquiry

The 2nd stage questionnaires for collection of detailed information on Danish DCPSs on data relevant to organic agriculture were sent out to the organisations having responded on the introductory questionnaire which has been sent out in the 1st phase. The questionnaires were differentiated according to the following stages in the production - consumption chain: Farm level, Processing/Wholesale level, Retail level, Consumer level and Import / Export.

3 organisations returned 7detailed questionnaires (one for each DCPS). An overview is presented in table 6-6.

Table 6-6: Overview of institutions and returned 2nd stage questionnaires

Institution	Level of DCPS	Name of DCPS	Harmonized to international database?	Covering total and/or organic production?
Statistics Denmark	Retailer	Turnover in retail shops	Yes, EU	Total production only
	Consumer	Household survey	Yes	Total production only
	Import /Export	Foreign trade	Yes, EU	Total production only

Danish Plant Directorate	Farm	Unique	Yes, to EEC Reg. 2092/91	Organic production only
Danish Veterinary and Food Administration	Retailer	Scanjour	Yes, EEC Reg. 2092/91	Yes, both conventional and organic data (organic data distinguishable since 2003-4)
	Import / Export	Scanjour	Yes, EEC Reg. 2092/91	Yes, both conventional and organic data (organic data distinguishable since 2003-4)

Statistics Denmark holds 3 internationally harmonised DCPSs at retailer, consumer and import/export level, which however, do not discriminate between total and organic products at the moment (see also description of Statistics Denmark). Statistics Denmark and their new survey on turnover of organic products in retailer shops and foreign trade with organic products has been suggested as possible Scandinavian case study in the EISfOM project.

As certifier and control authority for processors/wholesalers, retailers and importers of organic food products, the Danish Veterinary and Food Administration has the "Scanjour" database. All companies handling food products are registered in this database and all companies covered by organic inspection are registered separately according to the requirements of the EEC 2092/91. No details on organic product quantities, prices etc, are collected except for egg laying hens (average) and number of produced, packed and sold eggs. The data of "Scanjour" are quality checked currently.

6.5 Conclusion

Two organic DCPSs can be found at the Danish Plant Directorate. One covering FSS information for all certified organic farms, and one covering all Danish companies delivering certified organic input materials to the organic farmers. The Danish Research Institute has the FADN DCPS harmonised with the EU covering all farms and organic farms separately. The FADN is based on FSS information from Statistics Denmark and the FSS information from the Danish Plant Directorate. The FADN on organic farms covers accounts statistics on a yearly basis for a sample of 13 % of the organic farmers (in year 2002). The data collection and processing on farm level is therefore well covered and coordinated for organic farming statistics in Denmark.

At the other levels in the chain from primary production to final consumption very little information on organic products is available on a regular basis. For these levels there are no institutions with separate organic DCPS.

7 Estonia

Country report

ESTONIA

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7.1 National relevance of organic farming

In 2003 there were 765 managed organically (288 certified farms and 477 farms in conversion) in Estonia (1,1% of total farms number in Estonia). They covered 40890,41 ha (4,59% of UAA). Respectively - 16224,09 ha certified farms and 13658,86 ha in first year of conversion and 11007,46 ha in second year of conversion. (Situation on 10.11.2003, source: Estonian Plant Production Inspectorate www.plant.agri.ee)

There are no estimates about the size of organic market in Estonia that is at a very early stage of development (if we can consider it as functioning market). The supply is low. The most important products are the plant products. Due to insufficient number of organic processors (till 2003 only one milk processing facility, slaughter house, on-farm mill and on-farm bakery) only 20% of organic food is sold as organic. Almost no organic animal products are sold. Main distribution channel is direct sale (farmers are delivering organic products to consumer but also kindergartens, hospitals) Some products are sold through farmers markets.

The premium price depends on type of distribution. Price is 10-15% higher in direct sale, up to 50% in box scheme and up to 100% in case of import.
The export is very low (mainly Scandinavian countries) and the import hardly exist (one importer).

7.2 Structure of national statistic data providers in agriculture

The introductory questionnaires were sent to 6 institutions including certifying units and NGOs that were active in organic farming. There were 4 questionnaires returned.

7.3 Information about the surveyed institutions

Statistical Office of Estonia (SOE)

Agricultural Statistics Division is governmental organization financed by taxes with main aim on primary and secondary statistical data collection. Data collection, processing, analysis, archiving and dissemination are among main activities of SOE

7.4 Institutions which run "Organic DCPS"

Plant Production Inspectorate is other governmental organization (financed by taxes). Main purposes include: certification and control of organic farming, primary statistical data collection, specialist interest group of organic movement, public administration, media (in farming sector). Data collection, archiving and dissemination are main activities in statistical issues.

Centre of Ecological Engineering is a private non-profit organization financed by user-paid service. The main purpose of activity is research and education as well as specialist interest group of environment and organic movements.

Estonian Organic Farming Foundation is private non-profit organization, financed by users (service paid). Main purpose is research and education as well as specialist interest group of organic movement.

7.5 Results of the second stage inquiry: Farm Level

The set of second questionnaires was sent to all the institutions that responded to Q1 and the Statistical Office of Estonia. There were 3 questionnaires returned that describe the data collection at farm level but there is no information on other levels of data collection.

Plant Production Inspectorate, Organic Agriculture Department

There is no specific name of the DCPS. It is run by Plant Production Inspectorate, Organic Agriculture Department. Only organic data is collected and covers all organic farms. It is related to Reg. 2092/91 structural and control data or equivalent national regulation. It covers number of holdings, crop areas, livestock numbers, number of processors and importers. Segmentation by NUTS is possible. Specific quality management system does not exist, however there is visual check by experts. Data is published in Internet and by reports. The DCPS has no relation to others DCPS's.

Statistical Office of Estonia, Agricultural Statistics Division

FSS based on national census, carried out in 2003. It covered 100% of Estonian farms. Data on organic products was recorded together with conventional one and is comparable. Quality management system is based on computerised plausibility check; visual check by experts; triangulations. Data will be reported on internet - "Farm Structure Survey 2003". There is some relation between this data and FADN carried out by Janeda Advisory and Training Centre. Problems with definitions are mentioned as weakness and as strengths are seen possibilities of this data comparison with administrative data. The DCPS plans to use Organic Farming Register for organic variables in 2005.

Janeda Advisory and Training

Janeda Advisory and Training Centre carries out FADN. It is newly implemented data gathering system, which started in 2003. Cover both organic and total data, sample is not representative – consists of total 500 farms including 40 organic ones. Total and organic data are directly comparable. Quality management system consists of visual check by experts. Some information is disseminated by Internet, but no results are prepared yet.

7.6 Conclusions

There is still poor data availability because the system needs to be developed. Plant Protection Inspectorate is the main institution that run administrative database of organic farms for the future needs of 2092/91 regulations. However, the data gathered by Plant Protection Inspectorate is being verified by the FSS that covered all the farms (census based) but the FSS was run for the first time in 2003 and the results are going to be published in 2004. The farm level data collection system that includes organic farms could be an interesting example for CEE accession countries which are undergoing the same processes of adjustments. Unfortunately, there was no information on other levels of data collection provided.

8 Finland

Country Report

FINLAND

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8.1 National relevance of organic farming

According to the Plant Production Inspection Centre (KTTK), there were in 2003 4.983 organic farms with a total production area of 159.987 ha of which, 142.054 ha were certified organic and 17.933 ha were in conversion (1st and 2nd year). In table 8-1 some key statistical figures for organic agriculture are presented (Heinonen, KTTK, 2004: Organic Farming in Finland).

Table 8-1: Number and area of organic farms in Finland year 2002

	Organic farms		All farms
	Total	In % of all farms	
Number of farms	4.983	6.8	72.000
Total production area, ha	159.987	7.2	2.200.000
Certified organic area, ha	142.054	6.5	
Total production area per farm, ha	32,1		31

Source: Heinonen, 2004

The number of organic farms peaked in 2000 with 5.225 organic farms, but since then it has been stable around 5.000 farms. However, the area of organic farming is still growing as is the average production area of the organic farms, which is higher than for conventional farms.

In 2002 about 45 % of all organic farms were husbandry farms, but only 411 farms had certified animal production, because it is not a prerequisite to convert the animal production in order to get organic farming subsidies and the market for organic animal products is not well developed. Of the certified husbandry farms 41% had dairy cows, 63% beef cattle, 17% sheep or goats, 15% poultry and 7% pork (a farm may have more than one type of animal production).

The state authority in charge of the inspection system laid down in the Council Regulation EEC 2092/91 is the Plant Production Inspection Centre (KTTK), http://www.kttk.fi/en/default_en.htm, which keeps a register of all organic farm operators and co-ordinates the inspection work of the 15 Rural Department of Employment and Economic Development Centres. KTTK certifies according to the State Regulation, while the 2 private certification bodies, Luomuliitto ry http://www.luomu-liitto.fi/ and the Finnish Bio-Dynamic Association http://www.biodyn.fi/english.htm certify according to their own organic standards but based on inspection reports generated by the public authorities.

In December 2002 there were 503 registered food processors, packers and third country importers covered by the certification systems. A detailed overview is presented in table 8-2.

The National Food Agency http://www.elintarvikevirasto.fi/english/ certifies processors, packers and third country importers, while the National Product Control Agency control the processing and marketing of organic alcoholic beverages.

In January 2003 657 operators (farmers and processors) – mostly food processors were using the State Certification label “Luomu – Valvottua tuotantoa” (Certified organic production) on 3000 products.

Table 8-2: Overview of certified processors, packers and third country importers of organic products in December 2002.

Type of production	Number of operators
Processors of animal products	88
Bakeries	72
Mills	41
On-farm processors	74
Other types of processors	95
Supermarkets	24
Granaries	25
Packers	26
On-farm packers	20
Re-packers and re-labelers	7
Whole salers of collected wild products	22
Third country importers	9
	503

Source: National Food Agency

The market share of certain organic products in supermarkets has been calculated since August 1999 by A.C. Nielsen. The total market share of organic products was about 1.5 % in 2002 corresponding to a retail sale of about 250 million EURO. Since 1997 Finland has exported cereals and peas to France, Italy, the UK, Germany and Canada, and in 2000 the exports of cereals (mainly oats) was about 25.000 t.

8.2 Structure of national statistics/data providers in agriculture

The EISfOM introductory questionnaire was not sent out separately to Finnish statistics/data providers, as it was agreed with EUROSTAT, that questionnaires should not be sent out to their statistical partners, until they had been informed by EUROSTAT. In Finland 6 of the most important statistical sources on organic statistics (Ministry of Agriculture and Forestry, Information Centre of the Ministry of Agriculture and Forestry (TIKE), Statistics Finland, Plant production Inspection Centre (KTTK), Consumer Agency and National Food Agency (EVI) were partners of EUROSTAT for which reason it was decided not to send out the introductory questionnaire to the 5 other identified potential sources of organic statistical information in Finland (National Product Agency (STTV), University of Helsinki, the Mikkeli Institute for Rural Research and Training, A.C. Nielsen Oy, Finnish Food and Drink Industries and Finfood Luomu).

The introductory questionnaire (Q1) was sent out by EUROSTAT together with the detailed questionnaires (Q2) to the above mentioned statistical information sources. 2 filled in introductory questionnaires were returned, one from the Information Centre of the Ministry of Agriculture and Forestry (TIKE) and one from the Plant Production Inspection Centre (KTTK).

In table 8-3 is given an overview of these two organizations together with the most important other sources on statistical information on agricultural production.

Table 8-3: Overview of the most important data collecting and/or processing Finnish organizations.

Name:	Type of organization	Level of data collection	Collection of "organic" data separately?
Information Centre of the Ministry of Agriculture and Forestry (TIKE) http://tike.mmm.fi/Default_se.htm	Governmental data collection and processing	Farm level, FSS, FADN Whole production sector Processing/ Input manufacture Import/export	Yes, in co-operation with KTTK
Plant Production Inspection Centre http://www.kttk.fi/en/default_en.htm	Governmental certifier	Farm level	Yes, primary data source for organic data on farm level.
Statistics Finland http://www.tilastokeskus.fi/index_en.html	Governmental data collection and processing	Secondary data collector/processor Whole sector	No
Ministry of Agriculture and Forestry http://www.mmm.fi/english/	Governmental	Secondary data collector/processor Farm level	No
National Food Agency (EVI) http://www.elintarvikevirasto.fi/english/	Governmental certifier	Processing Wholesale level Retail level Import	Yes, number of processors, wholesalers and retailers
Agrifood Research Finland http://www.mtt.fi/english/	Governmental research institute	Farm level, FADN	Yes, organic farms earmarked
Consumer Agency http://www.kuluttajavirasto.fi/user_nf/default.asp?tmf=0&lmf=0&id=0&site=36	Governmental agency	Retail level Consumer level	Yes, but not on a regular basis
National Product Agency (STTV) http://www.sttv.fi/	Governmental agency	Processor level	Yes, organic processors of alcoholic beverages
A.C. Nielsen Finland Oy http://www.acnielsen.fi	Private for profit organisation	Wholesale level Retail level Consumer level	Yes, share of retail sale for some organic food products
Finfood – Luomu http://www.finfood.fi/finfood/ff.nsf/pages/finfood_english	Private non profit agriculture and food promoting organization	Farm level	No, but dissemination of organic data based on TIKE and KTTK http://www.finfood.fi/finfood/ff.nsf/f5bfdd900b7de792c22568e900687e49/37e5363d2ad55abcc225691c002a62a2?OpenDocument&Start=1&Count=1000&Expand=1

8.3 Information about the surveyed institutions

8.3.1 Information Centre of the Ministry of Agriculture and Forestry (TIKE)

http://tike.mmm.fi/Default_se.htm

TIKE is a department under the Ministry of Agriculture and Forestry, which is responsible for the collection and processing of the main part of the Finnish agricultural Statistics. It is one out of 4 statistical authorities in Finland. TIKE runs an information service on agricultural statistics, "Matilda", which may be accessed in English at http://matilda.mmm.fi/servlet/page?_pageid=115,193&_dad=portal30&_schema=PORTAL30. TIKE is responsible for the FSS in Finland.

8.3.2 Plant Production Inspection Centre (KTTK)

http://www.kttk.fi/en/default_en.htm

The Plant Production Inspection Centre is a governmental agency under the Ministry of Agriculture and Forestry. KTTK is in charge of the inspection system laid down in the Council Regulation EEC 2092/91 and keeps a register of all organic farm operators and manufacturers and wholesalers trading with certified input products for the organic farmers. Besides, KTTK co-ordinates the inspection work of the 15 Rural Department of Employment and Economic Development Centres, which carry out the inspection of the certified organic farms and input manufacturers etc. KTTK is responsible for the collection of FSS data on organic farming in close co-operation with TIKE. KTTK also makes an annual crop yield survey based on a sample of 700 organic farms.

8.3.3 National Food Agency (EVI) http://www.elintarvikevirasto.fi/english/

The National food Agency is responsible for the inspection of all processors, wholesalers, retailers and catering centres dealing with organic food products plus control of imports of food products from third countries (outside the EU). The National Food Agency collects statistical information on the number of registered and controlled processors, wholesalers and retailers, but no information from the individual companies on e.g. type and size of production, financial turnover etc. is collected.

8.3.4 Agrifood Research Finland http://www.mtt.fi/english/

Agrifood Research Finland collects FADN farm level data continuously on about 800 farms of which 74 farms are organic.

8.3.5 A.C. Nielsen Finland Oy http://www.acnielsen.fi

A.C. Nielsen, a private, for profit marketing information company has since 1999 made regular calculations of the market share (value and volume) of certain organic products in supermarkets. It covers fresh bread, flakes, flour, pasta, fresh milk, yoghurt and eggs plus the following vegetables: carrots, onions, potatoes, cabbage,

tomatoes and cucumber. The service is provided by A.C. Nielsen Scantrac In Store Conditions Service,
http://www.acnielsen.com/products/reports/scantrack/instoreconditions/

8.4 Results of the second stage inquiry

2 organizations returned 7 2nd stage questionnaires for collection of detailed information on DCPS.

The Plant Inspection Centre (KTTK) returned a filled in Q2 for the farm level DCPS, Register of organic farming, which is harmonized to Regulation 2092/91 Structural and control data. It contains only organic data, and the data collection is done in close collaboration with the Information Centre of the Ministry of Agriculture and Forestry (TIKE), which is responsible for the FSS. Data are collected for all certified organic farms and it contains data on all crop products plus number of animals of all types. The reports are available free of charge.

From the Information Centre of the Ministry of Agriculture and Forestry (TIKE) was received 6 filled in Q2s, 5 on farm level and one on wholesaler and processor level. All the DCPS' are harmonized to international database systems except for one DCPS at wholesaler/processor level on milk and milk products. The other 5 DCPS are on farm level covering data on production statistics, price statistics, supply balance sheet and FSS. However, none of these DCPS contain separate organic data.

8.5 Conclusion

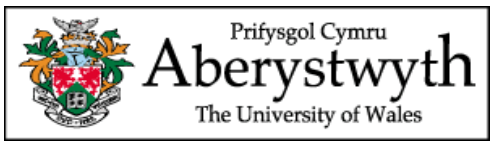
The data collection and processing on farm level is reasonably well covered for organic farming in Finland as concerns Farm Structure Survey (FSS) data, which are collected by the Plant Inspection Centre (KTTK). KTTK also makes an annual survey on organic crop yields based on a sample of 700 organic farms. There are statistical data for organic farming in the Farm Accountancy Data Network (FADN), but they have not been published since 1996.

At the other levels in the chain from primary production to final consumption very little information on organic products is available on a regular basis. For these levels only the market information company, A.C. Nielsen is carrying out regular analyses on certain organic food products in the supermarket chains.

9 France

Country Report

FRANCE



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9.1 National relevance of organic farming

According to the report *L'Agriculture Biologique Française – Chiffres 2002* (Agence BIO), 517,965 hectares of land were under organic management in France at the end of 2002. This represents 1.75% of the French UAA. Of these, 175,559 ha were in conversion and 342,406 ha were certified. The number of production units in organic agriculture was 11,288 at that date.

Organic production is more concentrated in some French regions than in others. The proportion of land area that is organically managed is highest in the [North-] West, [North-] East and the South. The proportion of organically managed land is considerably lower in the North and Centre of the country.

Table 9-1: Regional distribution of Organic Land Area in France (2002)

Region	Organic (ha)	In-conversion (ha)	Total (ha)	% UAA
Alsace	7758	2877	10635	3.1
Aquitaine	14597	9690	24287	1.5
Auvergne	19948	10914	30862	2
Basse-Normandie	21895	6317	28212	2
Bourgogne	16470	8576	25046	1.3
Bretagne	25826	8419	34245	1.9
Centre	10051	6757	16808	0.7
Champagne-Ardenne	4538	2961	7499	0.5
Corse	2072	911	2983	1
Franche-Comté	15407	8778	24185	3.3
Haute-Normandie	2427	826	3253	0.4
Ile-de-France	1472	1408	2880	0.5
Languedoc-Roussillon	31275	13767	45042	4.2
Limousin	12076	8035	20111	2.3
Lorraine	13085	7553	20638	1.8
Midi-Pyrénées	32985	25172	58157	2.3
Nord/Pas-de-Calais	2435	845	3280	0.4
Pays de la Loire	41455	16957	58412	2.5
Picardie	2325	1891	4216	0.3
Poitou-Charentes	14282	8433	22715	1.3
Provence-Alpes-Côte-d'Azur	22358	10657	33015	3.6
Rhône-Alpes	27589	13801	41390	2.5
Outre-Mer	80	14	94	-
France	**342406**	**175559**	**517965**	**1.75**

(Source: Agence BIO, L'Agriculture Biologique Française – Chiffres 2002)

The land area managed organically more than doubled in France between 1998 and 2002, with significant increases taking place especially in the period from 2000-2002. Preliminary figures recently publicized indicate that, at the end of 2003, the land area under organic management had reached 550,000 hectares.

Table 9-2: Evolution of French organic land area, 1998-2002

Year	1998	1999	2000	2001	2002
Total Organic Land Area (in-conversion + fully-converted) – in hectares	218,800	315,917	370,742	419,750	517,965

9.2 Structure of national statistic/data providers in agriculture

Table 9-3: First Stage Questionnaire Responses – France

Type of institution	Contacted	Responses
Governmental	2	2
semi-governmental	1	1
non-governmental	2	
private (not for profit)	2	1
private (for profit)		
Total	7	4

The response rate for the first stage questionnaire was 62.5% in France. As shown in the table above, of the organizations which responded to the first stage questionnaire none were 'for profit' private sector organizations. The organizations which completed the questionnaire were involved in data collection mostly on a project-by-project basis. Only one organization (L'Agence Française pour le Développement et la Promotion de l'Agriculture Biologique - Agence BIO) responded to the second-stage questionnaire, providing information on three DCPSs. This organization was identified by other first-stage questionnaire respondents as the most important organization involved in organic sector data collection in France. The web site address is http://www.agencebio.fr .

In addition to Agence BIO, there exist a number of organizations in France which are responsible for regional *observatories*. Many of these organizations report on organic sector developments and trends in their respective regions, and in some cases make reports and statistics available via their web sites. Relevant regional organizations include:

Confédération des Groupements des Agrobiologistes de Bourgogne
http://www.biobourgogne.fr/

Inter Bio Bretagne
http://www.interbiobretagne.asso.fr

Centre Régional de Ressource en Agriculture Biologique des Pays de la Loire
http://www.qualite-pdl.com/bio/index.htm

Association de l'Agriculture Biologique en Picardie
http://www.bio-picardie.com/

GABNOR (Groupement des Agriculteurs Biologiques du Nord-Pas-de Calais)
http://www.agriculturebio.com/gabnor/index.htm

Centre des Groupements des Agrobiologistes de Lorraine
http://www.nature-en-lorraine.net/cga.htm

Table 9-4: Level of Data Collection in France

Level of Data Collection – First Stage Questionnaire Responses	
Farm	2
Production	3
Wholesaler / processor	2
Trade	1
Retailer	
Consumer	2
Policy	

9.3 Institutions which run "Organic DCPS"

All the DCPSs described below relate exclusively to organic data. The four organisations in France which responded to the first-stage questionnaire were contacted in relation to the second-stage questionnaire. Of these, only one, Agence BIO, responded - covering three DCPSs.

9.3.1 Observatoire national de l'agriculture biologique

→ farm-level
→ wholesaler/processor level

The collection of statistical data on organic farming within this DCPS commenced in 1995. However, Agence BIO has been the agency responsible for the management of the *Observatoire national de l'agriculture biologique* and information relating to

organic farming notifications in France since 2001/02. As part of this work Agence BIO produces the annual statistical report *L'Agriculture Biologique Française – Chiffres*. This report contains data on land area by crop type, at national and regional level, as well as data on livestock numbers. The same report also contains data on processing activities.

9.3.2 Baromètre de la perception et la consomation des produits biologiques

→ consumer level

Agence BIO has been collecting consumer-level data since 2003. The *Baromètre de perception et de consommation des produits biologiques* en France is an annual to study on the French consumers' perceptions of organic products. Using a representative sample of the French population, a survey is conducted to obtain information on – for example – patterns of consumption of organic products, profiles of consumers of organic products, the image of organic agriculture, and recognition of the AB logo. The report from the study conducted in 2003 is available on-line: http://www.agencebio.fr/actualites.asp?FK_categorie=1&pk_actualite=10&n1=3

10 Germany

Country Report

GERMANY

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Department for Organic farming
Rochusstr. 2
53123 Bonn
Germany
Tel: +49-228-9777-363

10.1 National relevance of organic farming

In 1999 10.400 farms and 452.279 ha were under organic management. This makes up for 2,42 % of the total farms and 2,64 % of the total agricultural area in Germany. The organic land area could be divided in 215.000 ha grassland and 225.000 ha arable land. *(Estimate of organic production in Germany, 31.12.1999, Source: ZMP, 2001)*

Currently (31.12.2002) 696.978 hectares of agricultural land are managed organically by 15.626 farms. The organic share of 4,1 % of the total agricultural area and 4,0 % of the total number of farms exceeds the European average (31.12.2001*). (ZMP 2004, BLE Bundesanstalt für Landwirtschaft und Ernährung 2003)*

In 2002, the share of organic products of the entire food market was about 2,3 %, corresponding to approximately 3 billion Euro *(Source: ZMP, 2004)*. The different outlets had the following market shares:

Retail sales account for 35% of the food market, natural food shops for 26%, while „Reformhaeuser" (health food shops) represent 9 %. Direct marketing sales make up for 18 %, the market share of butchers and bakers is 7 % and other business types sum up to a market share of 7 % of the total food market. *(The data of Hamm is based on statistics as well as estimates of numerous market players. There are also other estimates, saying that the German organic food market amounts to 3.5 billion Euro). (Source: ZMP, 2004)*

Table 10-1: Organic agriculture in Germany in 2002

	2002
Number of organic farms	15.626
Organic area in ha	696.978 ha

Source: ZMP, Ökomarkt Jahrbuch, 2004)

10.2 Structure of national statistic/data providers in agriculture

Table 10-2: Structure of surveyed institutions in Germany

Type of Organisation						
	Govern-mental	Semi-Governmental	Non-Govern-mental	Private (non profit)	Private (profit)	TOTAL
Contacted	Ca. 10	Ca. 10	Ca. 5	Ca. 110	Ca. 40	275
Responded	5	3	2	6	8	24
Overall response rate						Unknown

Field of Activity							
	Market research	Primary statistics DC	Secondary statistics DC	Public admini-stration	Certifica-tion	Research	Specialist interest group
Responded (multiple entry possible)	4	9	9	3	5	6	7

10.3 Information about the surveyed institutions

10.3.1 Statistisches Bundesamt (SBA):

Federal Statistical Office
Statistical Information Service
Gustav - Stresemann - Ring 11
65189 Wiesbaden

Tel.: ++49-(0) 611/75-2405
Fax: ++49-(0) 611/75-3330

The assignment of the Statistisches Bundesamt (Federal Statistical Office) is to provide and distribute objective, independent and highly qualitative statistical information to all, namely politicians, government, administrative agencies, business and industry as well as the citizens in general. Besides the Farm Structure Survey the Federal Statistical Office also provides different statistics about import/export of agricultural products, salary of farmers and food expenses. Responsible for these data are the statistic groups foreign trade (import/export statistics), salary and wages, labour costs as well as accounts and time budget (income and consumption sample).

According to the federal state and administrative structure of the Federal Republic of Germany the country wide official statistics ("federal statistics") are accomplished in co-operation between the Federal Statistical Office and the statistic offices of the 16 countries. The federal statistics is thus to a large extent decentralised organised. In the context of this division of labour the Federal Statistical Office has a co-ordinating function primarily. Most important task is to ensure that the federal statistics are accomplished in time non-overlapping, according to uniform methods and in a timely manner.

10.3.2 BMVEL

Bundesministerium für Verbraucherschutz, Ernährung und Landwirtschaft
Rochusstr. 1
53123 Bonn
Tel. ++49-(0) 228-529-3837
Rainer.Meyer@bmvel.bund.de
www.verbraucherministerium.de

The three main objects of BMVEL are precautionary consumer production, quality control and non-polluting and animal friendly production. These grant an economic perspective for a competitive. Quality-orientated and enterprising agriculture.

Safety with food, healthy nourishment, protection of animals, nature and environment have to be the guiding principle of our thinking and our policy. Other branches are the development of rural areas, fishery policy and forest programmes as well as the development of a European Agricultural Policy.

10.3.3 Zentrale Markt- und Preisberichtstelle (ZMP)

ZMP Zentrale Markt- und Preisberichtstelle für Erzeugnisse der Land-, Forst- und Ernährungswirtschaft GmbH
Rochusstraße 2
D-53123 Bonn
E-mail: info@zmp.de
Tel.: ++49-(0)228/9777-0
Fax: ++49-(0)228/9777-300

ZMP is a semi-governmental company, which is financed by compulsory fees of farmers. Objectives of the company are the permanent collection and dissemination of information on agricultural, food, forestry and timber markets. With the means of modern editorial and communication techniques, ZMP has to provide neutral and up-to-date information services to all audit groups of the agricultural marketing chains. Fields of Action: On behalf of the Absatzfonds (German Agricultural Marketing Fund) ZMP is monitoring the market and prices of arable crops and livestock production. On behalf of the Holzabsatzfonds services are provided for the forestry and timber industry. Procedures and Results: Collecting, processing, description and evaluation of facts, figures, tendencies and trends in agricultural markets, particularly on supply, demand and prices. Presentation in articles, comments, tables and graphs. Dissemination in own newsletters, online services, fax mailings and as contribution to other media. Publishing of annual reviews. Consulting and research on request.

10.3.4 Control bodies

Control bodies have to report (quarterly or yearly) the number of organic enterprises as well as the organic area cultivated and livestock numbers to their regional control authorities (Länderbehörden). Once a year the regional authorities have to report these data to their superior authority BLE (Bundesanstalt für Landwirtschaft und Ernährung) where these data are summarized for Germany and published differentiated according to the federal states (Bundesländer) and compared to total area and farm gates by ZMP.

Some control bodies record yield data to the ZMP as well (mostly for cereals, fodder, potatoes, maize, fruits). For the production data (organic area and livestock numbers) the ZMP has to pay the control bodies a yearly amount of about 18.000 Euro.

The data may not always be uniform. Errors may occur during data recording or database retrieval. Another problem are the different categories and methods the control bodies are using. Also, some control bodies have no electronic database. One example for a control body is the “Kontrollstelle für ökologischen Landbau GmbH”, wich collects data of physical quantities. The data are collected at the whole sale and processor level and forwarded to the BLE. The data collection is conducted yearly by a special questionnaire in several federal states (NUTS 1). In the federal state Thüringen the collection covers 100 % of the production. A data quality check is done by comparison with other sources.

10.3.5 AC Nielsen

A.C. Nielsen
Ludwig-Landmann-Str. 405
60486 Frankfurt/Main
Tel.: ++49-(0)69/79385-23

ACNielsen is a worldwide operating company doing research for retail sales to consumers. ACNielen collects scanning data from (a sample of about 750) supermarkets and offers producers and retailers a detailed insight in the sales of products. Information is collected of retail channels like supermarkets, hypermarkets and discounters. Usually ACNielsen retail panel reports are confined to packaged goods at multiple retailers and drug discounters. Beverage shops are included when necessary. ACNielsen offers information about all kinds of development in retail per area, type of supermarket, size of supermarket. For many product characteristics ACNielsen delivers facts like volumes, sales, prices and distribution level.

10.3.6 GfK/IRI

GfK Panelservice
Nordwestring 101
90319 Nürnberg
Tel.: ++49-(0)911/395-3363
Fax: ++49-(0)911/395-4009

GfK conducts a consumer panel with 13.000 households. These households continuously register data about their product purchase behaviour for fast moving consumer goods using in-home scanners. In order to register products without EAN (like fresh vegetables) GfK provides their households with a detailed code book where codes for many fresh products are available. GfK-split for fresh food is much more detailed than the one of ACNielsen Homescan. After scanning a fresh food item in the code book the panelists are conducted to a scanner dialogue in order to record further product characteristics like country of origin, package type and organic / non organic classification. The purchase data of the households are pulled by GfK via modem once a week.

GfK offers information about all kind of development in retail per area and shop types. For many product characteristics GfK is able to deliver facts like volumes, sales, prices and penetration, purchase frequencies, loyalty, buyer demographics and attitudes, etc.

10.4 Institutions which run “Organic DCPS”

- (Federal) Statistical Offices
- BMVEL
- ZMP
- ACNielsen
- GfK (testing)

- Bio Vista
- Several agricultural chambers

10.5 Results of the second stage inquiry

Table 10-3: Overview about existing DCPS by actor level

DCPS	Institution	Actor level	Total	Organic
Farm level				
Geschlossene Benutzergruppe ökologischer Landbau	Bayerischer Bauernverband	Producer prices	X	X
Bayerische Buchführungsstatistik	Bayerische Landesanstalt für Landwirtschaft	Farm level	X	X
Beratungs- und Informationssystem Gartenbau	Arbeitskreis Betriebswirtschaft im Gartenbau e.V.	Farm level	X	X
Testbetriebsnetz	Bundesministerium für Verbraucherschutz, Ernährung und Landwirtschaft	FADN	X	X
InVeKoS	Bundesministerium für Verbraucherschutz, Ernährung und Landwirtschaft	FADN	X	X
Agricultural structure survey in Germany	Statistisches Bundesamt	FSS	X	X
Milchpreisvergleich	ZMP	Producer prices	X	X
ZMP structure data collection	ZMP	Farm level		X
ZMP FB Ökologischer Landbau	ZMP	Producer prices		X
Wholesaler/ Processor Level				
Verarbeitetes Getreide	Landwirtschaftskammer Rheinland	Wholesale / Processor		X
Umsätze Naturkosthandel	Bundesverband Naturkost Naturwaren Herstellung und Handel e.V.	Wholesale / Processor		X
ZMP-Whole sale level price reporting	ZMP	Wholesale / Processor	X	X
Retailer / Consumer Level				
Bio-Vista – Handelspanel	Bio Vista GbR	Retailer		X
ZMP-Handelspanel	ZMP	Retailer level	X	X
ZMP-Öko-Verbraucherpanel	ZMP / GfK	Consumer level	X	X
AC Nielsen	Retail Panel and Consumer Panel	Retailer/ Consumer Level	X	X
GfK/IRI Consumer Scan	GfK/IRI	Consumer Level	X	X

10.6 Detailed information about DCPS, which include organic data collection

10.6.1 Farm Level

Bayerische Buchführungsstatistik der landwirtschaftlichen Betriebe

Bayerische Landesanstalt für Landwirtschaft
Institut für Agrarökonomie
Dr. Eva-Maria Schmidtlein
Infanteriestrasse 1
80797 München
Email: eva-maria.schmidtlein@LfL.bayern.de
Tel. 089/12 13 –15 17/ 15 02
Fax: 089/12 13 – 14 44

The DCPS collects data of business accounting of individual farms in Germany. Data collection is coordinated by the "Bundesministerium für Verbraucherschutz, Ernährung und Landwirtschaft" (BMVEL). Motivated by administrative, policy and research demand, data are surveyed yearly. The results are published in Bavarian accounting statistic . The integration of organic farms into the sample exists about 5 to 10 years. Organic data can be distinguished from the total data for nearly 3 years.

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Name of the DCPS: Bayerische Buchführungsstatistik
- Statistical Scope: accounting of individual farms, number of farms
- Segmented by: ?

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

The DCPS covers both organic and total data. A distinction between organic and conventional farming is partially possible.

Does the DCPS promise relative valid and reliable results?

- The data collection is done as a non representative sample of nearly 3000 to 3500 conventional and 110 organic farms.
- The data collection is done once a year.
- Plausibility of data is checked by experts and a computerised plausibility check
- The system does not allow a direct comparison between organic and total farm data, because the number of farms is too low.

How are the results disseminated?

- The results are published once a year in a report and included in the accountancy statistics.

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is harmonized with the DCPS „Bayerische Buchführungsstatistik der landwirtschaftlichen Betriebe".

What were the main opportunities, barriers, strengths and weaknesses for the DCPS? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? If yes, which plans do exist?

- Weaknesses: Not all data can be collected caused by a specialized data collection system (e.g. figures for fiscal analysis). The possibilities to categorise collection are too few.
- Strengths: The DCPS is standardised for Germany and the results include several years.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

- No

Testbetriebsnetz

Bundesministerium für Verbraucherschutz, Ernährung und Landwirtschaft
Herr Rainer Meyer
Rochusstr. 1
53123 Bonn
Tel. ++49-(0)228/529-3837
Rainer.Meyer@bmvel.bund.de
www.verbraucherministerium.de

The German Federal government has to submit a report to the German Bundestag and the Bundesrat every year the 15th of February about the situation of agriculture in Germany. For many years organic farms and processors are presented separately.

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- The results of test farm network of the ministry of consumer protection, nutrition and agriculture (BMVEL) of the agricultural accountancy (TBN) are published every year in the agricultural report, now nutritional and agricultural politics report, of the German Government on approx. 20 pages. One page describes the situation of organic farms. Besides the number and area of the organic farms are shown, the profit and loss account of selected forms of organic farms are represented as well as their income and a comparison with similar conventional farms.

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- Because of the sufficient number of farms the farms now can be differentiated between the three types of farms: tillage, forage growing and mixed farming can be compared with their conventional comparison group.

Does the DCPS promise relative valid and reliable results?

- The approx. 15 500 organic farms in Germany are represented by 264 test farms, these are 1,8 %. A larger number of test farms is demanded by the federal states and promoted by the Federal government. Unfortunately there is

no grouping for regions or states yet because of the low number of farms. Plausibility tests are checking the quality of data.

How are the results disseminated?

- Data are annually published by the 15th of February in the nutritional and agricultural politics report. They are also used for preparation of political actions. The report is sent to public authorities, specialists and interested parties and is represented at the homepage of the ministry.

How is the DCPS harmonised or related to other superior DCPS?

- The agricultural accountancy systems exist for many years, but are enhanced continuously. The farm systems are adopted from the EU and the whole test farm net is compatible to the INLB. Trainings for the farms assure a high quality level.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- A stringent quality control with the assortment of the farms and their trainings assure, especially if there are improvements. Continuously working staff in all spheres (farms, accountancy, states, staff) assures continuity and quality. Data are publicly available and in professional and political discussion. All spheres of the TBN, professional and political, are compatible with the INLB.
- The TBN and the INLB and within the part of the organic farms can used as a model for other countries. Experts inform about it in the EU-accession countries and meet continuously in Germany for enhancing the system.

Geschlossene Benutzergruppe ökologischer Landbau

Bayerischer Bauernverband
Agrarmärkte und Marktpolitik
Willi Zellner
Max-Joseph-Str. 9
D-80333 München
E-mail: willi-zellner@bayerischerbauernverband.de
Tel.: ++49-(0)89/55873-104
Fax: ++49-(0)89/55873-292

The DCPS collects the output and input prices for the federal state Bavaria. The Data are collected monthly and are not available for a fee. Motivated by political demand and the interest of the organic farmers the integration of organic data was started in 2003.

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Name of the DCPS: Geschlossene Benutzergruppe ökologischer Landbau
- Statistical Scope: Prices of outputs and inputs
- Segmented by: A segmentation by product groups is possible

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?
The DCPS covers both organic and total data. A distinction between organic and conventional data is possible since 2003.

Does the DCPS promise relative valid and reliable results?
- The non representative sample covers 79 farms or 2 % of the organic farms.
- The data collection is done monthly.
- The data are checked by experts and triangulation method.
- The system does not allow a direct comparison between organic and total farm data.

How are the results disseminated?
- The results are not disseminated. They are only available for the members of the closed user group “ökologischer Landbau”.

How is the DCPS harmonised or related to other superior DCPS?
- The DCPS is harmonized with ZMP DCPS for the organic sector.

What were the main opportunities, barriers, strengths and weaknesses for the DCPS? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? If yes, which plans do exist?
- Strengths: Exclusivity of data and close to market. Quality will improve.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?
- Yes, as the method is similar to that of the ZMP.

Beratungs- und Informationssystem Gartenbau

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The DCPS collects accounting data of individual farms in horticulture. The data collection started in 2001 and is motivated by administrative, political and research demand. Data are collected yearly. They are disseminated in a report. The data are partially confidential. Reports are available for a fee.

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?
- Name of the DCPS: Beratungs- und Informationssystem Gartenbau
- Statistical Scope: accounting of individual farms, the hectares of farms, labour
- Segmented by:

- Data are segmented by size and type of the farms.
- Data are segmented by the product groups: “fresh vegetables, melons and strawberries” and “fruits and berries”.
- Data are segmented by NUTS 1

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?
The DCPS specially collects organic data. A separated DCPS collects data for conventional farming.

Does the DCPS promise relative valid and reliable results?
- The data are collected by a non representative sample.
- The system allows a direct comparison between organic and total farm data. Due to the small sample, in some parts no comparison is possible.
- The data collection is done once a year.

How are the results disseminated?
- The results are published once a year in the report “Datensammlung Ökologischer Gemüsebau”.

How is the DCPS harmonised or related to other superior DCPS?
- The DCPS is not harmonized with superior DCPS.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?
- Chance: Technical improvement of the DCPS.
- Barriers: Problems of organisation.
- Strengths: Data are used for statistical analysis. Additionally, they can be used as decision support in farm consulting. Data exists for several years.
- Weaknesses: Small sample caused by a voluntary participation, time lag of data collection.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?
- Yes

Milchpreisvergleich (milk price reporting)

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The total system started in 1994. The milk price reporting on organic milk started in 1999. At the beginning, only data for 7 specialised dairies were reported. Today,

there are also data of dairies available, which produce organic milk/ milk products (Milchunion Hocheifel, Campina).

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Name of the DCPS: Milchpreisvergleich
- Statistical Scope: Net Farm prices for milk as well as for some production cost data.
- Segmentation: Regional segmentation is possible for Nuts1 (federal states).

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- It covers both, a distinction is possible.

Does the DCPS promise relative valid and reliable results?

- 500 conventional as well as 60 organic producing farmers send their milk account monthly. The observed dairies account for 95% of the German conventional milk production as well as 80% of the organic milk procession. The farm sample itself is not based on a representative approach.
- Data are collected monthly.
- A direct comparison of total data and organic data is possible.

How are the results disseminated?

- Aggregated data are freely accessible by agricultural press. Data are evaluated once per year.

How is the DCPS harmonised or related to other superior DCPS?

- It is not harmonized to any superior system.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- If possible, data evaluation should take place at least every six month.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

This approach covers almost 100% of German milk production. It's a very valuable system for German farmers.

ZMP-producer price reporting for organic markets

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The ZMP price reporting covers all important product groups and most marketing levels. The collection is done by the organic department: fruit and vegetables; animals / meat; milk and eggs (only direct sales); cereals and potatoes. Usually, prices are collected. For some product groups, quantities are collected as well.

Which types of data are collected relating to different levels in the supply chain? Specific name of the DCPS:

- Producer prices for fruit, vegetables, potatoes and cereals on the different sale levels direct, retailer and wholesaler are collected.
- Producer prices for meat in direct sale, to butchers and slaughter houses.
- Milk and eggs only for producer prices in direct sale. A separate milk price reporting system is run by the conventional milk department.
- The segmentation criteria: Depending on the product: quality, size.

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- Only organic data are collected/ reported separately.
- Reasons for not integrating organic data collection into total data collection were:
  - A low market share of organic products (< 2%) and at the beginning of the DCPS no interest by conventional departments.
  - Organic products are not traded by traditional whole sale markets / producer organisation. Usually, organic markets have an own distribution structure.
  - Limited human resources did not allow to extent activities on organic markets

Does the DCPS promise relative valid and reliable results?

- It is the only relevant open resource for price data at the producer level in Germany

How are the results disseminated?

- For organic market data there is an online data base and a report is printed weekly.

How is the DCPS harmonised or related to other superior DCPS?

- In most product groups, it is possible to compare conventional and organic data.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist ?

- Limited human resources.
- Harmonizing the product systematic to EUROSTAT systematics.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

- Yes.

ZMP data collection for detailed structure of the organic agriculture (Strukturdatenerhebung für den Öko-Landbau)

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The ZMP structure data collection covers data of all important product groups at the production level. The collection is done by the organic department for fruit and vegetables; cereals and potatoes, oilseeds, fodder, , animals / meat; milk and eggs.

Which types of data are collected relating to different levels in the supply chain? Specific name of the DCPS:

- Data on farm structure (number of farms, production area, number of cattle).
- yield data / data on animal production:
- Segmentation by product groups:

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- Only organic data are collected / reported separately. Nevertheless, a direct comparison with total data is possible, even though there are some differences in category definitions.

Does the DCPS promise relative valid and reliable results?

- Yes. Data are based on control institution information. It covers about 90% of the organic area as well as 94% of all producers.

How are the results disseminated?

- The data are published in the annual book “ÖKOMARKT-Jahrbuch”.

How is the DCPS harmonised or related to other superior DCPS?

- So far, there was no request from any international DCPS.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist ?

- No obligatory data delivery, categories vary, data delivery costs.
- Not all control bodies do cooperate
- Time series since 1998.
- Harmonisation shall be realised during EISfOM Project

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

- Yes

InVeKoS

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InVeKoS (Integrated system for administration and control) is a data pool, which has to be applied for controlling certain measures of CAP. In Germany this survey is combined with data collecting systems for other support measures in agriculture offered by individual Bundesländer too.

Which types of data are collected relating to different levels in the supply chain? Specific name of the DCPS:

- This system provides data of organic farm structure.

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- Only organic sector

Does the DCPS promise relative valid and reliable results?
Concerning data and area it offers a quite useful, but incomplete database. Only as far as the farmers are beneficiaries of measures supporting organic farming they are included. Organic farmers that claim only support measures outside organic farming supporting schemes are not identified as organic. Looking for the number of animals the value of InVeKoS is rather poor among other things because only beneficiaries of cattle and sheep premiums are subject to registration. Furthermore, InVeKoS data are only aggregated up to the level of individual federal states and not for Germany in total. The latter is rather difficult due to more or less differences in breakdown and classification of facts in each federal state.

How is the DCPS harmonised or related to other superior DCPS?
More reliable and representative data of structural situation of organic farms are available by the farm structure survey carried out the last time in the year 2003. This survey provides data on areas and number of animals but not on yields.

Agricultural structure survey in Germany (FSS)

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The agricultural statistics of the Statistisches Bundesamt are dealing with selective aspects of agricultural structure and production in Germany. These statistics, especially the agricultural structure survey, have always been the most comprehensive sources of information for observing and assessing medium and long-term changes in the production capacities and structure of agricultural holdings. Legal basis for the farm structure survey is the Council Regulation (EEC) No571/88, the Federal Statistics Law and the law on agricultural statistics. Since 1999 organic farming is part of the farm structure survey. The "type of farming" is a character of the general survey part (determination of the holding units). Organic farming means holdings, in which organic production methods are applied according to European Community rules (Council Regulation (EEC) No 2092/91). The question, whether the farm is licensed by a board of control according this regulation or not, is the key for the type of the holding. Then all characteristics, that are important in economic terms, can be assessed separately for "conventional holdings" and those that use organic methods. To improve the quality of the information about land use and livestock, the questions for organic farming were extended in farm structure survey 2003. Now it is also possible to give information on agricultural area of the holdings which is under conversion to organic farming production methods and on animal production which is totally or partly applying organic production methods.

Which statistical scopes are covered by the agricultural structure survey and which segmentation does the data set allow?

- Statistical scope: farm structure data
- Segmentation criteria: farm land, livestock, property and ownership, labour force, production types

Does the agricultural structure survey cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?
The agricultural structure survey covers data on organic and total farming. The question of "type of farming" distinguishes between holdings, that are "conventional" and those that use organic methods. With the aid of this question, characteristics can be assessed separately for both groups of holdings.

Does the agricultural structure survey promise relative valid and reliable results?
The agricultural structure survey promises valid and reliable data. So the survey methods are comprehensible as conducting the survey, sample, obtaining and inputting data as well as processing and analysing the data. Every holding (also organic farms) up the lower recording limits has to answer the general survey part of

the agricultural structure survey. In the representative part of the agricultural structure survey 100 000 agricultural holdings are surveyed. The sample is designed as a multi-purpose random sample. The sample survey holdings were selected purely at random by mathematical and statistical principles. The data were entered into a processing and plausibility program. After that the data were checked for completeness and coherence with the aid of an extensive test program standard.

How are the results disseminated?
The results of the organic farming in the agricultural structure survey, broken down in detail by subject matter and region, are available to everyone after they have been processed in the Statistical Offices of the federal states and after the results for Germany have been published by the Federal Statistical Office. The results of the farm structure survey were published in the form of press releases and subject-matters (Fachserien). Further publications are available at the homepage of the Federal Statistical Office.

How is the agricultural structure survey harmonised or related to other FSS in the EC?
In the Council Regulation (EEC) No 571/88 on the organisation of Community surveys on the structure of agricultural holdings the EC list all characteristics for the farm structure survey (FSS). For each survey regulation also says whether it should be taken generally or representatively or come from sources other than statistical surveys. There is also the designation whether survey characteristics for the individual Member State do not exist, are non-significant or optional. The EC's list of characteristics can therefore be more extensive than that of the national survey.

10.6.2 Wholesaler / Processor Level

Landwirtschaftskammer Rheinland

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The DCPS collects price data of of processed cereals based on organic raw material in the federal state Nordrhein-Westfalen. Data collection was started in the 90th. It was initiated by commercial demand. Data are collected weekly. Results are presented in a weekly farmers' magazine "Landwirtschaftliches Wochenblatt Westfalen-Lippe", where whole sale prices of processed cereals in Nordrhein-Westfalen are published.

Which types of data are collected relating to different levels in the supply chain?

- Specific name of the DCPS: Verarbeitete Getreideprodukte
- Statistical scope which is related to the DCPS: wholesale prices
- The segmentation criteria: region of origin, quality, weight

At which level are data collected?

- The data are collected at the wholesale level.

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS covers only organic data.

Does the DCPS promise relative valid and reliable results?

- The data collection is based on an sample and covers 30 % of wholesalers and processors in that region.
- The data are collected weekly.
- There exists no system for data quality management.
- The DCPS does not allow a comparison between organic and conventional data.

How are the results disseminated?

- The results are summarised exclusively in the "Landwirtschaftliches Wochenblatt Westfalen-Lippe".

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is not harmonised or related to other superior DCPS.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist ?

- Strengths: actuality of data, data are customer-oriented.
- Weaknesses: data cover only a small share of the market

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

- Yes, for similar systems in other federal states of Germany.

Bundesverband Naturkost Naturwaren Herstellung und Handel e.V.

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By the DCPS the turnover of organic wholesalers is reported, trends and forecasts for natural food are generated for Germany. Initiated by commercial demand, a sample is conducted monthly. The results are presented in reports, newsletters and in the internet. The data are confidential. Only summaries of the data are available. Data collection was started 1990.

Which types of data are collected relating to different levels in the supply chain?

- Specific name of the DCPS: Umsätze Naturkostgroßhandel
- Statistical scope which is related to the DCPS: turnover, trends and forecasts
- The segmentation criteria: non food, fresh food and dry food

At which level are data collected?

- Wholesale level

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS covers only organic data.

Does the DCPS promise relative valid and reliable results?

- The data represent 90 % of the wholesalers of natural food.
- Data are collected monthly.
- The data quality management is done by visual expert checks.
- The DCPS does not allow a direct comparison between organic product and total product data.

How are the results disseminated?

The results are summarised in reports ("Trendbericht" once a year, "BNN-Nachrichten", quarterly), Newsletter (BNN-Mail, fortnightly) and are available free of charge

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is not harmonised or related to other superior DCPS.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist ?

- Strengths: The DCPS is a continuous and exact measure of sales volume .
- Weaknesses: The data collection is restricted to value-adds.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

- Yes, for natural food stores

ZMP-Wholesale level (price) reporting (for total markets) (see table at the end)

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The ZMP whole sale market price reporting covers all important product groups. The collecting is done by separate departments (fruit and vegetables; animals / meat; milk and milk products; cereals and potatoes. Usually, prices are collected. For some product groups, quantities (e.g. on processed products or of storage) are collected as well.

Which types of data are collected relating to different levels in the supply chain?

- Whole sale prices on various levels
- Production volumes for some product groups (e.g. on processed products)
- Storage volume (e.g. on apples)

Specific name of the DCPS:

- "Apfellagerbestandserhebung", "Großmarktabgabepreisevergleich", "Erzeuger- und Handelspreise aus dem Ausland", "Möhrenmarkt Spezial", "Kernobstvorräte", "Verkaufspreise deutscher Schlachtereien", "Erzeugerpreise für Lebendgeflügel"

Statistical scope which is related to the DCPS:
Different levels are involved, depending on the market structure. Besides wholesale markets there are systems involving producer organisations, packaging stations, slaughter houses, mills or dairies.
The segmentation criteria: Depending on the product: quality, size, regions, product groups

At which level are data collected?

- Sometimes spatial criteria as federal states, producer, processor, wholesaler
- Depending on the product: quality, size

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- Organic data are usually collected / reported separately.
- The whole sale market reporting usually does not cover both conventional and organic markets. There are some exceptions where data on organic markets are gathered by conventional systems as well (apples, carots, meat 4. DVO, chicken).
- Organic data are not integrated into total DCPS nor distinguishable from total data. For most product groups, a separate system exists in the organic department of the ZMP. There is one exception – this is the fax report on carots / onions.
- Organic data are collected for the following reports
  - Pipfruit (Kernobst), apples, carrot, onions
  - Livestocks : poultry (Geflügel)
- Reasons for not integrating organic data collection into total data collection were:

- A very low market share of organic products (< 2%).
- Organic products are not traded on traditional whole sale markets / producer organisation. Usually, organic markets have an own distribution structure.
- Conventional market participants are not interested in organic market data.
- Not enough human resources in the conventional departments.
- Organic market participants are not interested providing data to the conventional market. They fear a price decline when having to compete to conventional markets.

Does the DCPS promise relative valid and reliable results?

- For some products (e.g. fruits and vegetable), the coverage is low. For others, almost 100% of the market is covered. (Almost) 100% market coverage are reached for slaughtered meat or early potatoes, apple storage, fruit and vegetable price reporting from producer organizations. For other products like chicken, between 80 and 90% of the population are covered.
- For most product groups, there is no direct possibility to compare data of organic and conventional products.
- Usually expert checks are used to ensure data quality.
- For most product groups, data are gathered weekly on conventional markets.
- The frequency for some organic products is rather monthly or quarterly.

How are the results disseminated?

Usually by a print medium or by fax report. For organic market data and some conventional data exists an online data base.

How is the DCPS harmonised or related to other superior DCPS?

- Most of the systems are not harmonized to superior DCPS (on European level).
- In some product groups it is possible to compare conventional and organic data.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

- Yes, some systems can be taken into account.

10.6.3 Retailer Level

Bio Vista

Bio Vista GbR– Handelspanel
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Which types of data are collected relating to different levels in the supply chain?

- Specific name of the DCPS: Bio-Vista – Handelspanel
- Statistical scope which is related to the DCPS: retail sales, retail volumes per product group, retail volumes per market type, consumption frequencies, market share of single product groups, national consumer prices. Data related to brands.
- Data are collected for: bread and cereals, fruit, vegetables, beef incl. veal, sheep and goat, pork, poultry, fish and fishery products, milk, milk products, cheese, eggs, edible fat and oil, sugar, jam, honey, chocolate and sweets, sauces, salt, herbs, soups, coffee, tea, cocoa, water, lemonade, juice, baby foods, alcoholic beverages, wine, beer
- The segmentation criteria: sales channel, market size, spatial criteria

At which level are data collected?

- Retailer-Level

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The panel covers only organic sector data. Its focusing on organic retail shops. (Naturkostwarenhandel). Data collection started in 2003.

Does the DCPS promise relative valid and reliable results?
Yes, comparison to other methods like BNN showed similar results

How are the results disseminated?
The report is not openly available.

How is the DCPS harmonised or related to other superior DCPS?

- price-volume-correlation, market basket analysis (in preparation), price development
- It is planned to extend the segmentation criteria by differentiating three regions starting mid of 2004. A differentiation according Nielsen-regions is planned, starting 2006.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

- Yes for the natural food segment

ZMP- Handelspanel

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Which types of data are collected relating to different levels in the supply chain?

- Specific name of the DCPS: ZMP Handelspanel
- Statistical scope which is related to the DCPS: The system covers retail prices for conventional as well as organic products.
- The segmentation criteria: data are segmented according to sales channel and spatial criteria (Nielsen).

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- It covers both data.

Does the DCPS promise relative valid and reliable results?
Data collection is based on a representative sample of German food sales channels. 500 to 600 retail shops are visited weekly. Data for organic products are collected monthly. 500 to 600 questionnaires are filled in by people visiting stores. About 70.000 prices are collected every week. Each price is checked automatically twice (price barriers per product, statistical test).

How are the results disseminated?
Data are accessible via internet.

How is the DCPS harmonised or related to other superior DCPS?
The system is not harmonized to any superior DCPS.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?
Yes, for price reporting in supermarkets / food retail stores in general.

ACNielsen

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*Retail Panel "Market*Track": General Data Approaches*

ACNielsen is a worldwide operating company doing research for retail sales to consumers. ACNielen collects scanning data from (a sample of about 750) supermarkets and offers producers and retailers a detailed insight in the sales of products. Information is collected of retail channels like supermarkets, hypermarkets and discounters. Usually ACNielsen retail panel reports are confined to packaged goods at multiple retailers and drug discounters. Beverage shops are included when necessary. ACNielsen offers information about all kinds of development in retail per area, type of supermarket, size of supermarket. For many product characteristics ACNielsen delivers facts like volumes, sales, prices and distribution level.

Retail Panel: Organic Data Approaches

ACNielsen has no database with EANs of all organic products. They analyse trade texts and price lists of manufactures to generate organic product information. In addition ACNielsen's field service examines all products of a category in a sample of shops and divides them into organic or not. Up to now this field research is only realised for milk and yoghurt. In May 2004, the shop audits will take place for milk, yoghurt, butter and curd cheese. Next year we intent to cover about 10 further product categories.

10.6.4 Consumer Level

ACNielsen

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Consumer Panel "Homescan": General Data Approaches

ACNielsen conducts a consumer panel with 8400 households. These households continuously register data about their product purchase behaviour for fast moving consumer goods using in-home scanners. In order to register products without EAN (like fresh vegetables) ACNielsen provides their households with a bar code manual where codes for certain product categories are available. The ACNielsen product split for fresh food is not very detailed.

Consumer Panel "Homescan": Organic Data Approaches

ACNielsen Homescan and Market*Track use the same product databases, i.e. when the organic product identification is realised for Market*Track the information is also available in Homescan. For fresh food (without EAN), ACNielsen does not distinguish between organic and conventional food.

GfK/IRI in Germany

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GfK Consumer Scan: General Data Approaches

GfK conducts a consumer panel with 13.000 households. These households continuously register data about their product purchase behaviour for fast moving consumer goods using in-home scanners. In order to register products without EAN (like fresh vegetables) GfK provides their households with a detailed code book where codes for many fresh products are available. GfK-split for fresh food is much more detailed than the one of ACNielsen Homescan. After scanning a fresh food item in the code book the panelists are conducted to a scanner dialogue in order to record further product characteristics like country of origin, package type and organic / non organic classification. The purchase data of the households are pulled by GfK via modem once a week.

GfK offers information about all kind of development in retail per area and shop types. For many product characteristics GfK is able to deliver facts like volumes,

sales, prices and penetration, purchase frequencies, loyalty, buyer demographics and attitudes, etc.

Organic Data Approaches

GfK has no database with EANs of all organic products. Thus they have to analyse trade texts and price lists of manufactures in order to generate organic product information for EAN-products. For fresh food without EAN the scanner dialogue asks the panelist to classify between organic and other food products. ZMP is planing to buy GfK Consumer Scan data for the fresh food categories bread, cheese, sausage, meat, fruit, vegetables, potatoes and eggs.

IRI Retail Panel: General Data Approaches

IRI is a retail panel research company doing research for retail sales to consumers. The technique is similar to the approach of ACNielsen retail panel "Market Track".

IRI Retail Panel: Organic Data Approaches

IRI has no database with EANs of all organic products. They are not planning to build up any organic product classification databases.

GfK-ZMP- Öko-Sonderpanel

ZMP Zentrale Markt- und Preisberichtstelle für Erzeugnisse der Land-, Forst- und Ernährungswirtschaft GmbH
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Tel.: (0228) 9777-0
Fax: (0228) 9777-300

The GfK Öko-Sonderpanel is conducted by GfK Gesellschaft für Konsumforschung by order of ZMP (www.zmp.de).

Which types of data are collected?

- Name of the GfK mail panel: Öko-Sonderpanel
- Types of data, which are collected: market penetration, consumer expenditures, consumption volume, purchase frequency
- Segmentation criteria which can be used: socio-demographic criteria (age, family types, household income, education), spatial criteria (federal states), product groups (fruit, vegetables, meat and meat products, milk and milk products, cheese, eggs, oil, bread, flour and flour products etc.), food retailers (distribution channels)

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

The DCPS covers only organic sector data. A direct comparison between total and organic consumption data is not possible.

Does the DCPS promise relative valid and reliable results?

- Concerning the methodology a representative mail sample and a household dairy are used.
- Based on a representative mail sample with 20.000 households reporting on their consumption behaviour (sample is representative for 33,8 mio consumer households in Germany), the Öko-Sonderpanel covers 5.000 households of this sample. These households were asked to judge their organic consumption. They had to fill in written forms on a quarterly base.
- Out of this sample, target groups for a second step were selected. Criteria for the selection was a minimum of one purchase of organic products per month. During the second step, 500 households got dairies to note their monthly purchases. This covered amount as well as value per product and retailer..
- As for quality management plausibility experts checks were used.
- Data collection took place between October 2002 and December 2003. Altogether, 2.500 dairies with true bio purchases were analysed.

How are the results disseminated?

- Data are accessible publicly. Some layouted and aggregated data on distribution channels and purchased products are available on the internet.

How is the DCPS harmonised or related to other superior DCPS?

- Harmonised with GfK systematics

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- Strengths: The DCPS gives a general overview on the structure of the organic market in Germany.
- Weaknesses: The DCPS does not report about absolute amounts and volumes
- This panel will not be prolonged. Instead of this, it is planned to use a combination of normal household panel and retail panel.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

- Yes

Table 10-4: ZMP-whole sale and processor level reporting:

	Names (conventional markets)	Data	Organic	Can be integrated
Fruits and vegetables	Großmarktberichterstattung	Prices	Großmarktabgabe preisvergleich	No, different level
	Erzeugergroßmarktberichterstattung	Prices	Ausländ. Erzeuger-u Handelspreise	?
	Kernobstvorräte	Quantities	Apfellagerbestands erhebung	Theoretically, but organic is closed user group
	Erdbeerfax	Prices		
	Spargelfax	Prices		
	Heidelbeerfax	Prices (quantities)		
	Möhrenmarkt Spezial / Zwiebelfax	Prices (quantities)		Some organic data are integrated
Milk	Großhandelspreise für inländische Milchprodukte	Prices		
	Großhandelspreise für ausländische Milchprodukte	Prices		
	Schnellberichterstattung Rohmilcheingang der Molkereien bzw. ausgewählte Verarbeitungsprodukte (Butter, Käse (Ohne Frischkäse) und Milchpulver)	Quantities		
Pork/ Beef	Schweinepreisvergleich	Prices		
	Erzeugerpreis der Vereinigung von Erzeugergemeinschaften von Vieh und Fleisch	Prices		
	Meldungen nach der 4.ten DVO nach dem Fleischgesetz	Quantities		Organic data are integrated but not distinguishable
Chicken / Eggs	Verkaufspreise deutscher Schlachtereien	Prices		
	Erzeugerpreise für Lebendgeflügel	Prices		
	Eierrückbericht – Packstellenabgabepreise	Prices		
	Marktexpress Eier: Notierungen	Prices		
Potatoes	Kartoffelbericht	Prices		
	Frühkartoffelbericht	Prices		
	Warenterminbörse Kartoffeln	Prices		
Grain	Kammerprogramm	Prices		

10.7 Conclusion

In general the demand for data on organic farming in Germany from stakeholders as well as for administration and research organisations is quite high.

Farm level data concerning the number of organic farms and cultivated area are available in general. They are collected by the BLE and published by the ZMP.

Every 4 years the statistical office (Statistisches Bundesamt) generates data on the farm structure, which is more detailed than the one of BLE. But these data do not

inherit information about farms smaller than 2 ha. As there are especially in the organic sector a lot of farms under 2 ha, which have significant influence on the market, ZMP is generating every year a farm structure survey by collecting data from the control bodies. As some of these private enterprises do not collaborate even these data do not cover 100 % of the organic farms and area cultivated until now.

The ZMP publishes a weekly report including producer and consumer prices on different marketing levels and different shop types.

Besides structural data on organic farms and prices in Germany, the availability of data concerning other actor levels has to be improved. Especially data on the market volumes, imports and exports on production level as well as on points of sale are not sufficiently available until now. Although in the recent past there are some new approaches to gather consumer data by CMA/ZMP/GfK and ACNielsen. Import and export data are not available at all.

Although there is only little progress in improving data availability there seems to be a strong interest from the ministries to get better information on the market situation.

11 Greece

Country Report

GREECE

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11.1 National relevance of organic farming

In 2002 there were 6.047 farms which represent 0,7% of the total number of agricultural farms and 28.944 hectares (0.86% of total land).

The main organic products of Greece are olive oil and olives, followed by other tree crops, especially citrus fruits, arable crops and wine. Organic olive production is not very different from extensive, rain-fed, conventional olive production. The difference is in fertilising practice (green and animal manure) and Dacus fly protection (traps instead of spraying). There is enough know-how for this crop and organic cultivation practices costs are not much higher than the conventional, and the hectare subsidy is at a high level.

Demand for organic olive oil is high, especially from foreign countries; in the last years, marketing olive oil has become more difficult due to the increase in the number of producers. Wine is the second major product after the olive. Marketing organic wine depends not only on the organic certification of the product but especially on the know-how involved in the wine-making process.

Organised marketing of organic products is just starting with marketing organisations coming up and expanding during the last few years. Most products are exported, especially fresh fruit, olives, olive oil and wine. Organic food shops have opened during the last few years in the large cities of Greece (Athens, Thessaloniki). As the production in Greece is limited (small quantities, seasonal, small variety of products), many organic products are imported. A small number of specialised stores buy and sell organic products on a wholesale basis, too. A big chain of supermarkets started some time ago to sell organic products in a special „organic“ section in co-operation with different groups and individual producers and presents organic products in the company’s advertisement journal . Many farmers, however, sell their products among conventional farmers at the local weekly markets in their districts or directly from the farm.

11.2 Structure of national statistic / data providers in agriculture

An introductory questionnaire was sent to eight institutions see in following table, but only one of these answered (Aristotle University of Thessaloniki)

Table 11-1:: Structure of surveyed institutions

Name of Organizations	Type of organization	Responded
Agrocert - Greek Organization for Certification and Inspection of Agricultural Products	private	No
Biotos - Hellenic organic products S.A.	private	No
DIO-Certification & Inspection Organization	private	No
Fysiologiki, Inspection - Certification and Organic Farming Dev	private	No
SOGE, Association of Ecological Agriculture of Greece	private	No
AGESRI - Agricultural Economics & Social Research Institute	private	No
Agricultural University of Athens	Semi-governmental	No
Aristotle University of Thessaloniki	Semi-governmental	Yes

11.3 Information about the surveyed institutions

11.3.1 Aristotle University of Thessaloniki (Dept. of Agricultural Economics)

The University of Thessaloniki is a Semi-governmental institution financed by taxes. Its main functions are primary and secondary statistical data collection, research, education Specialist interest group and media. Statistical data, collection and analysis are the principal objectives of this institution, integrated in each department. The Department of Agricultural Economics collects data on crops, livestock and processed products at different levels: farm, whole production sector, processing, wholesale, trade, retail, consumer and policy-relevant non market indicators.

11.4 Conclusion

Organic data are collected by the Ministry and other organizations, but we did not receive any information about collection and processing data.

12 Hungary

Country Report

HUNGARY

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12.1 National relevance of organic farming

In general, the importance of the agricultural sector in Hungary measured with economic indicators is slightly higher compared with EU countries. The share of agriculture in the gross domestic production in 2000 was 3.9 percent.

In 2002 the agricultural area of Hungary was about 5.8 million ha and more than 1.7 % (103.672 ha) was inspected organic area. Over 50 % was arable land. From the inspected area 54.497 ha had organic status and 49.175 ha were 'in conversion' land. The 103.672 ha were farmed by 995 farmers (Table 12-1).

The number of inspected partners (enterprises) is summarised in Table 12-1 using categories according to the EC Reg. of 2092/91. 1116 farmers, 100 processors, 92 traders and 5 importers were inspected.

Table 12-1: Number and distribution of inspected partners in 2002

Categories	Activity of enterprises	No. of enterprises:
Category A	Farmers Small-scale farmers	995 121
	Bee-keepers	193
	Producers collecting wild fruits, herbs	10
Category B	Processors, partners dealing with packaging	100
	Traders	92
Category C	Importers	5
Total:		**1.516**

Source: Biokontroll Hungária Kht, annual report (2002)

Table 12-2 shows that most of the land was utilised with arable crops.

Table 12-2: Size of inspected areas according to utilisation (2002)

	Organic area (ha)	'In conversion' area (ha)	Total inspected area (ha)
Grasslands	21.777	20.867	42.644
Herbs and spices	494	372	866
Fruits	708	78	1.494
Arable crops	25.050	20.813	55.863
Fallow	910	2.345	3.254
Vegetables	694	311	1.004
Others (forests, lakes)	4.864	3.683	8.547
Total:	**54.497**	**49.175**	**103.672**

Source: Biokontroll Hungária Kht, annual report (2002)

Organic farming in Hungary is supported by the government: Farmers get subsidies for the conversion of farms to organic agriculture. Subsidies are lower for continuing with organic farming.

Biokultúra is the biggest farmer association in Hungary. Biokultúra became a full member of IFOAM (the International Federation of Organic Agriculture Movements) in January 1987. Biokultúra has forty-eight regional sub-organisations.

Biokontroll Hungária is the biggest national certification and inspection body. Since 1996 inspections and certifications have been carried out by the inspection body "*Biokontroll Hungária* Company for the Public Benefit," which was set up by Biokultúra. The accreditation of "*Biokontroll Hungária*" as a private inspection body according to EU-regulation 2092/91 by the Hungarian government gave this body an advantage over the foreign inspection bodies. Ninety per cent of the Hungarian organic producers and processors were inspected by "*Biokontroll Hungária*" in 1998.

About 90 % of the organic produced goods are exported. Since 1990 the importance of the export countries has changed. In the early years most of the exports went to The Netherlands and over the last few years most of them went to Germany. In 2000, Hungary exported $8.2 million in organic exports, approximately 80 percent of production, to markets in Western Europe. The largest amount of crops include wheat, corn, sweet corn, sunflower-seed, apricots, and honey. Hungary's domestic market for organics remains small at approximately $1 million. About half of domestic consumption is taken for baby food. Suppliers to Hungary include mainly EU countries and a few others from Western Europe. Hungary has been on the equivalence list of third countries according to the EC Reg. 2092/91 since 1996.

Literature: http://www.organic-europe.net/country_reports/pdf/2000/hungary.pdf, www.biokontroll.hu (annual report 2002), http://europa.eu.int/comm/agriculture/external/enlarge/publi/ countryrep/hungary.pdf), http://www.fas.usda.gov/gainfiles/200005/25677682.pdf (gain report for Hungary of the USDA, 2002).

12.2 Structure of national statistic/data providers in agriculture

Table 12-3 shows that 11 institutions were contacted and 4 filled in the first questionnaire. The overall response rate is about 36 %. 57 % of the contacted persons in governmental and semi-governmental institutions responded but none of the contacted persons of non-governmental private institutions or enterprises.

Table 12-3: Structure of surveyed institutions in Hungary

Type of Organisation						
	Govern-mental	Semi-Governmental	Non-Governmental	Private (non profit)	Privat (Profit)	TOTAL
Contacted	4	3	3		1	11
Responded	1	3				4
Overall response rate						36 %

Source: Own calculations

Table 12-4 shows that a wide range of functions from statistical data collection to research and education is represented by the institutions which have responded.

Table 12-4: Main function of the institutions which responded

Main function of the institution which responded (Multiple answers possible)	Number of institutions
Market research/intelligence (qualitative/quantitative)	2
Primary statistical data collection	2
Secondary statistical data collection	2
Public administration	1
Certification	0
Research	3
Education	2
Specialist interest group	1
Media	1

Source: Own calculations

12.3 Information about the surveyed institutions

12.3.1 Hungarian Central Statistical Office

Contact details:
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Internet: www.ksh.hu

The Hungarian Central Statistical Office of the Czech Republic is a professionally independent administrative organ of nation-wide authority operating under the direct supervision of the government. It is the main institution for primary data collection and processing, doing it in close cooperation with other institutions. It is financed mainly by taxes. Data is collected for all product groups on every level. The information is mainly disseminated by paper reports and websites. Reports are available for all products for closed user groups, paying clients, publicly and free of charge and publicly on payment. The DCPS on the farm level (Table 12-6) is harmonised. Until now data on organic agriculture is only limitedly available.

12.3.2 Ministry of Agriculture and Regional Development

Contact details:
Minstry of Agriculture and Regional Development
PO – Box 1

1860 Budapest
Hungary
Internet: www.fvm.hu

The Ministry of Agriculture and Regional Development in co-operation with the Hungarian Central Statistical Office are the main institutions collecting organic production and market data. Information about data collection and processing are not available because no person of the ministry was willing to participate and fill in the questionnaires.

12.3.3 Resesarch and Information Institute for Agricultural Economics (AKII)

Contact details:
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AKII is a background institute of the Ministry of Agriculture and Rural Development which contributes to the needs of the ministry and is in addition an independent research institute. The most important tasks are primary statistical data collection, processing, analyses and dissemination. This is done for Hungary on the farm, wholesaler/processor and consumer level. AKII is mainly financed by taxes. Data collection and dissemination are important with respect to statistical data but not the major task of the Ministry of Agriculture. Data of almost all product groups for all levels with the exception of retailer and import/export level are collected, processed and disseminated. The DCPS information is disseminated in paper reports, websites and weekly papers. The reports are available for closed user groups, paying clients and publicly on payment. A Market Price Information System is available for total data on the farm, wholesaler/processor, and consumer level. The DCPS is not yet harmonised to international databases. Besides AKII operates on FADN, Sector Level Cost-Income and external trade data. Organic data is not collected and processed.

12.3.4 Biokontroll Hungaria Kht

Contact details:
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1027 Budapest
Hungary

Tel.: (36-1) 336-1122
Fax: (36-1) 315-1123
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Internet: http://www.biokontroll.hu

Biokontroll is the national certification and inspection body. Since 1996 inspections and certifications have been carried out by the inspection body "*Biokontroll Hungária* Company for the Public Benefit," which was set up by *Biokultúra*. The accreditation of "*Biokontroll Hungária*" as a private inspection body according to EC Reg. 2092/91 by the Hungarian government lead to the result that more than ninety percent of the Hungarian organic producers and processors were inspected by "*Biokontroll Hungária*" in 2002. Information about data collection and processing dealing with inspection, certification and the export of organic products are available on the webpage.

12.3.5 Biokultúra

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It is the largest national non-governmental organisation associating organic farmers, processors, traders and consumers. Biokultra provides several services to its members: It assists them in the process of transition from conventional to ecological farming, helps them solve their technical as well as administrative problems, and supports the sales and promotion of organic products. Information about data collection and processing was not available.

12.3.6 Other institutions

At the universities of Gödöllö and Budapest researchers are working on organic issues. Details about data collection and processing were not available. The data is mainly collected for the special needs of research, education and for project use.

12.4 Institutions which run an "Organic DCPS"

The following list gives an overview about the Institutions which run an organic DCPS:

- Hungarian Central Statistical Office
- Biokontroll Hungária, mainly for administrative use
- Ministry of Agriculture and Regional Development
- University of Gödöllö, for research

12.5 Results of the second questionnaire

The results of the second questionnaire are given in Table 12-5. 2 institutions filled in the second questionnaire. The response rate was 50 %.

Table 12-5: Number of surveyed institutions/response rate/response structure Czech Republic

Number of contacted institutions	Number of responses	Response rate	Response structure
4	2	50 %	Hungarian Central Statistical Office - Department of Agricultural Statistics AKII

Source: Own calculations

Table 12-6 gives an overview about existing DCPS by actor level.

Table 12-6: Overview about existing DCPS by actor level

DCPS	Institution	Actor level	Total	Organic
FSS	Central Statistical Office (Dept. of Agricultural Statistics) in co-operation with the Ministry of Agriculture and Regional Development (MARD)	Farm level	X	X
Production statistics	Central Statistical Office (Dept. of Agricultural Statistics) in co-operation with MARD	Farm level	X	
Supply balance sheet	Central Statistical Office (Dept. of Agricultural Statistics) in co-operation with MARD	Farm level	X	
Price statistics	Central Statistical Office (Dept. of Agricultural Statistics) in co-operation with MARD	Farm level	X	
Market Price Information System	AKII	Farm level	X	
Market Price Information System	AKII	Wholesaler/processor level	X	
Market Price Information System	AKII	Consumer level	X	

12.6 Detailed information about DCPS which includes organic data collection

Farm level: Agnes Polgar, Hungarian Central Statistical Office

This Data Collecting and Processing System (DCPS) is a Farm Structure Survey (FSS) and it started in 2000. The statistical scope is farm structure data segmented to farm type and size. The DCPS covers total data and includes variables so that organic farms can be identified. Separation of organic data however is difficult because data for animal production were not collected in 2000. Organic products cannot be separated in this DCPS. 99 % of the organic area and almost 99 % of the organic farmers are represented by the FSS. This DCPS is harmonised to Eurostat

and its requirements. In accordance to Eurostat a national census approach is used. The data are collected every 2-3 years. There is no information available about quality management systems. Total data are disseminated by reports, the Internet and CD-ROM whereas organic data are disseminated only by reports. The DCPS is still under construction but it has been planned to finish the data basis in future. This DCPS cannot be taken as a positive reference because it is difficult to distinguish the different products and because in the year 2000 organic data for animal production were not collected.

12.7 Conclusion

In general the availability of data concerning organic agriculture is not good because of limited resources of the main data collecting and processing institutions. The Hungarian Central Statistical Office is collecting data in accordance with the EU needs. The Ministry of Agriculture and Rural Development does not participate so that there is no information about data collection and processing available. AKII is so far only working on total statistics and is not sure that they will work on organic data over the next few years because of financial restrictions. Besides, Biokontroll is collecting data for their administrative use. There is no information about data collection and processing available from Biocultura. At least organic data is collected at the Universities of Gödöllö and Budapest. Although organic farming has made a rapid development, the official side will not provide people with a good database about organic data because of limited resources. Concerning the data quality, it is not possible to make a good statement due to lack of information.

13 Iceland

Country Report

ICELAND

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13.1 National relevance of organic farming in Iceland

In 2003 there were 30 certified organic farms corresponding to about 0,9 % of the total number of (approx.) 3344 farms in Iceland. 8 of those farms have geothermally heated glasshouses for production of several types of herbs and vegetables, as well as producers of flowers and other garden plants. The majority of organic farms are situated in the south and in the north of Iceland, while there are few organic farms in the west and east of Iceland. The organic land area (cultivated land plus range land) was in 2003 about 5460 ha corresponding to about 0,35 % of the total area used for agriculture. Agricultural area corresponds to about 15 % of the total area of Iceland. Table 13-1 shows an overview of the organic farms, classified according to main type of production. The development of organic farming has in recent years been very slow compared to other European countries, perhaps because the conversion support is very limited and there is no governmental policy nor action plan for the development of organic farming in Iceland. The expectations for the near future are modest.

Table 13-1: Organic farms classified according to type of production in 2003.

	Organic farms	All farms²)	Organic farms	All farms	% of all farms
	No.		%		
Total	30	3344*	100	100	0,9
Cattle farms	4	922	13	28	0,4
Sheep farms	10	2180	33	65	0,5
Other animal farms	1	60*	3	2	1,7
Arable farms[1)]	15	182*	51	5	8,2

3) Arable farms defined as farms with less than 0,5 Animal Unit per ha or whatever definition you have. Arable farms in Iceland are almost only potatoes, vegetable and garden plant producers.

4) There is overlap between types of farms (mixed farms), so the total figure is lower than indicated here, especially between cattle and sheep farming. But the extent of overlap is not known. (*) indicates that figure is an approximation and not a final figure.

It should be kept in mind that none of the wide ranging highland pastures (common land used for summer grazing of sheep) have been certified yet, although they are included in the baseline figures. A considerable part of total organic land area on livestock farms is uncultivated grazing land within the boundaries of those farms. The average size of organic farms as regards cultivated land is 29 ha compared to 39 ha for conventional farms. This is partly explained by the disproportionately high number of organic horticulture farms. The average size of organic livestock farms and horticulture farms in terms of cultivated land is 49 ha and 8 ha, respectively.

A total of 12 processing units, including 4 on-farm units, are certified to handle organic products. Four (4) of those are dairy processors, one bakery, two (2) vegetable processors, one (1) teas and food supplements, and three (3) packaging units. The largest certified organic producer in Iceland is a harvesting and processing unit of seaweed (laminaria and ascophyllum meal).

All organic farms and processing units are certified by the private, non-profit certifier and control organization Vottunarstofan TUN, which also certifies the 12 processors of organic products. Vottunarstofan TUN is accredited according to the standard EN45011 by the Icelandic Metrology and Accreditation Agency (ISAC). As a member of the European Economic Area (EEA) Iceland has now fully implemented the EU Regulation 2092/91, and recent amendments will be incorporated as soon as the EEA Joint Committee has approved their inclusion in the EEA treaty. Vottunarstofan TUN operates to the EEC 2092/91 as regards their certification and control.

The most important organic plant food products are carrots, potatoes, tomatoes and cucumber, as well as barley and herbs. The most important animal food products are cows´ dairy products (fresh milk, AB-milk and yoghurts) and meat from lamb. The total production of organic food products are sold on the home market, with the occasional exception of organic lamb. Organic seaweed meal is mostly exported and organic massage oils are to a small extend exported as well.

The majority of the conventional agricultural food products are also consumed at the home market, and the export of agricultural products is only about 1 % of the value of the annual export.

The market for organic products is increasing steadily and several wholesalers now import fresh and processed produce throughout the year, thus stabilizing the supply of all the basic horticulture products previously only available from local sources during the summer months. However, domestic production of plant produce appears to regularly fall far short of consumer demand as ever growing number of consumers favour organic to conventional. Import of organic food products is also growing, especially for grain-based products, baby-food and fruits.

13.2 Structure of national statistic/data providers in agriculture

The EISfOM introductory questionnaire was sent out to 6 public and private institutions in Iceland collecting and/or processing statistical data on agriculture and food products on a regular or irregular basis. 4 institutions (66,7 %) returned the filled in introductory questionnaire. 2 of these were governmental institutions while the other 2 were private non-profit institutions. An overview of the respondents is presented in table 13-2.

Table 13-2: Overview of data collecting and/or processing Icelandic organizations, which returned the introductionary EISfOM questionnaire.

Name	Type of organization	Level of data collection/ processing	Collection of "organic" data separately?
Statistics Iceland http://www.hagstofa.is/template40.asp?PageID=261	Governmental data collection and processing	Farm level Import/export Consumer	No
Agricultural Economics Institute http://www.hag.is/	Governmental research institute	Farm level Profit and loss account? Trade?	No, not in general, but some studies have been made. Responsible for collection of agricultural economic data from farming
The Farmers Association of Iceland http://www.bondi.is	Private, farmer owned non-profit organization	Farm level	No, collection of data on all farms
Vottunarstoffan TUN http://www.mmedia.is/tun/	Private, non-profit organic certifier and control body	Farm level Processor /wholesaler?	Yes, no. and area of organic farms, crop and animal production, no. and type of organic processors.

Besides the responding organisations there are the following institutions, which may collect or process data on agricultural prodction and trade.

Table 13-3: Other relevant "organic" data collecting and/or processing organisations in Iceland

Name	Type of organization	Level of data collection/ processing	Collection of "organic" data separately?
Ministry of Agriculture http://eng.stjornarrad.is/	Governmental	Farm level	No
Ministry of Foreign Affairs http://www.mfa.is/	Governmental	Import /export	No

13.3 Information about the surveyed institutions

13.3.1 Statistics Iceland http://www.hagstofa.is/template40.asp?PageID=261

Statistics Iceland is formally a government ministry under the prime minister. The section for Agricultural statistics is under the Division of National Accounts, and it is a secondary statistical data collection organization. Statistics Iceland collects information on farm level and reports data on crop products, livestock products and some processed products from Vottunarstofan TÚN.

13.3.2 Agricultural Economics Institute http://www.hag.is/

Besides research and education, the Agricultural Economics Institute is also a primary and secondary statistical data collector, processor and analyser. The Agricultural Economics Institute is responsible for agricultural economics statistics and report data to Statistics Iceland. Some studies have been done on organic production, but no regular surveys on primary organic production nor processing or marketing are carried out.

13.3.3 The Farmers Association of Iceland http://www.bondi.is

The Farmers Association of Iceland is the primary source of data at farm level for all farms, and they report these data to Statistics Iceland. They collect data on farm number and size, use of farm area, plant and animal stock and production on an annual basis. The most important data are published in an English annual report: Icelandic Agricultural Statistics.

13.3.4 Vottunarstoffan TUN http://www.mmedia.is/tun/

TUN is the certifier and controller of all organic farms and processors in Iceland. They collect some data on number of organic farms, area and production. It is the intention to increase the data collection on organic farms and processors in the near future in line with the framework provided by Eisfom.

13.4 Results of the second stage inquiry

The 2nd stage questionnaires for collection of detailed information on Icelandic DCPS on total or organic data relevant to organic agriculture were sent out to the organisations having responded on the introductory questionnaire sent out in the 1st phase. None of the 4 organisations returned any of the detailed questionnaires (Q2).

13.5 Conclusion

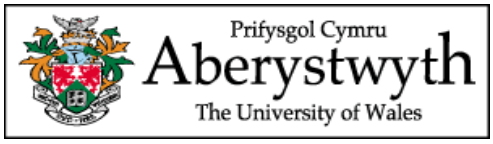
No Icelandic DCPS on agriculture are harmonised to an international DCPS, and Iceland does not participate in the Farm Structure Survey (FSS) and the Farm accountancy Data Network (FADN). Statistics on organic production is very limited at the farm level and there is no collection of data on the other levels, processor/wholesaler, retailer, import / export or consumer.

Vottunarstofan TÚN is planning to set up in 2004-2005 a database to cover these aspects within the framework of internationally recognized definitions, especially those used by EISfOM and similar projects.

14 Ireland

Country Report:

IRELAND



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14.1 National relevance of organic farming

There were 923 registered organic producers in Ireland in 2002, with 0.7 % of the agricultural land area in organic production. Organic farming is concentrated in the South and West of the country. The total land area under organic management in 2002 was 29,850 hectares, of which 6,418 hectares were in conversion. There were 573 organic beef producers and 23 organic dairy producers in Ireland in 2002. In the same year, only 16% of organic bovine animals were sold as conventional livestock. In 2002 there were 286 organic lamb producers in Ireland; the majority of finished lambs were sold to organic markets, while most store lambs were sold conventionally.

The Irish Organic Farmers and Growers Association (IOFGA) is the largest organic association in Ireland with over 650 registered farmers, growers and processors. In addition to being involved in inspection and certification, IOFGA also assists in efforts relating to the promotion and marketing of organic produce. The Organic Trust is another organization which provides inspection and certification services.

According to Bord Bia (Irish Food Board), the market for organic foods in Ireland is estimated to range between £20 and £25 million – under 1% of the total retail food market. Approximately 70% of organic food sold in Ireland is imported. Sales appear to be concentrated in the larger urban areas.

Illustration 14-1: Irish Organic Certification Symbols

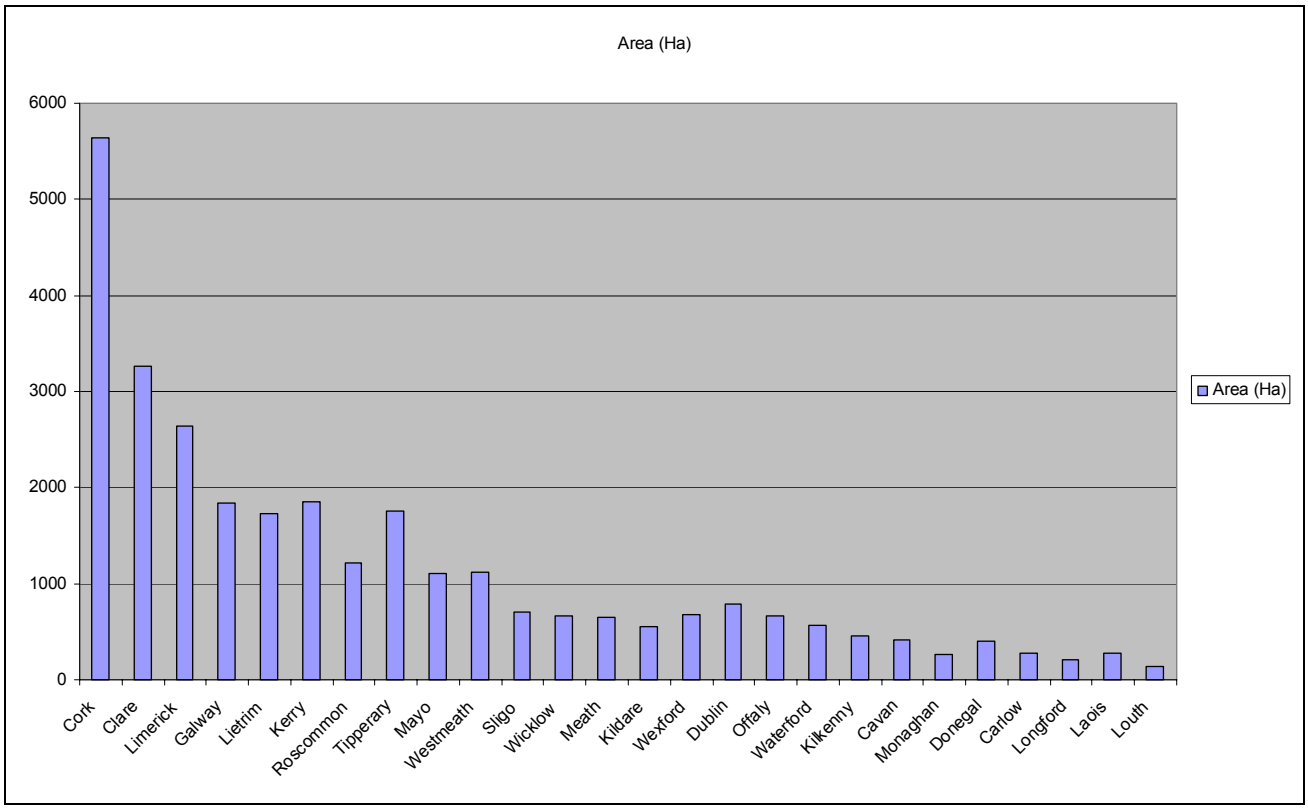

Figure 14-1: Regional distribution of organic production (land area) in Ireland (2002)

14.2 Structure of national statistic/data providers in agriculture

Table 14-1: First Stage Questionnaire Responses – Ireland

Type of institution	Contacted	Responses
Governmental		
Semi-governmental	1	1
Non-governmental		
Private (not for profit)	4	1
Private (for profit)		
Total	**5**	**2**

The response rate for the first stage questionnaire was of only 40% in Ireland. The two organizations which completed the questionnaire (Teagasc/National Food Centre and IOFGA) are involved in organic data collection on a project-by-project basis, and have declared that they do not have ongoing DCPSs.

Teagasc/National Food Centre is a semi-state organization dedicated to providing research, advisory and training services to the agriculture and food sectors. This organization is a partner in the EU-funded "Conversion" project (5th Framework Research Programme). Irish country reports from that project are available on-line: http://www.teagasc.ie/publications/2003/completefinalcompendiumreport.htm and http://www.agriculture.gov.ie/organics/Complete_Final_Marketing_Report.pdf. In the first-stage questionnaire response, Teagasc/National Food Centre indicated that all of its organic data collection is project-dependent – i.e., it only takes place when there are projects relating to the organic sector in progress.

The first-stage questionnaire response submitted by IOFGA indicates that data collection is not a major task of that organization, although it is a certification organization and it does collect data farm-level as well as production, processing, and wholesale/distribution data. IOFGA produces reports which are not available due to privacy/confidentiality issues.

The Organic Farming Unit of the Department of Agriculture and Food collects data on organic farming and has for the first time in 2003 published a Census of Irish Organic Production. This census of organic production in Ireland was carried out as result of a recommendation made by an Organic Development Committee, which is drawn from a wide range of organic sector stakeholders.

Bord Bia, the Irish Food Board, is dedicated to developing export markets for Irish food and drink companies. In 2003 Bord Bia produced a report, *Prospects for Organic Food in Ireland*, which contains key information on consumer issues relating to the Irish organic sector.

Table 14-2: Level of data collection and answers on the first stage questionnaire

Level of data collection	First stage questionnaire responses
Farm level	2
Production level	1
Wholesaler / Processor level	2
Trade level	1
Retailer level	1
Consumer level	1
Policy level	

14.3 Results of the second stage inquiry

Due to the fact that no responses were received for the second-stage questionnaire, it has not been possible to describe any DCPS from Ireland in detail. The brief description of one DCPS presented below is based on information gathered without use of the questionnaire.

Census of Irish Organic Production

The first Census of Irish Organic Production was conducted in 2003, with the data reflecting the situation as at the end of 2002. The organic census publication reports on numbers of producers and land area on a county-by-county basis, livestock numbers, numbers of livestock sold, and profiles of organic producers (including information on participation in agri-environmental schemes, for example). In addition, producers were asked to identify barriers to expansion of their organic business and the results are included in the report. The report is available on-line: http://www.agriculture.gov.ie/organics/Organic_Census-Launched_9_Oct_03.pdf

15 Italy

Country Report

ITALY

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15.1 National relevance of organic farming

Italy is a success story in organic production, taking advantage of favourable climate and agronomic conditions and close geographic access to major markets. Organic farming has been growth in Italy rapid and the domestic organic market is taking off. Relatively high financial support for organic producers has played an important role in the rapid development of production.

In Italy there are 49.489 organic farms that represent 2.14% of total agricultural farms comprising about one million hectares which is 8% of the total agricultural area. Fodder and cereals represent 70% of the cultivated area; followed by vegetables (10%) and olives (9%).

The economic value of the Italian organic market is about 1.38 billion € , with a very strong trend in growth; during the last few years it has never fallen below 20%. National companies and the Italian subsidiaries of multinational corporations have shown great interest in organic agriculture. The food trade, has launched new lines of organic products or taken over businesses operating in this sector.

The largest concentration of consumers buying organic products is in the northern regions of Italy, where the industrial and economic structure is stronger. Most of the organic products are however produced in the southern, more agriculturally oriented, and warmer parts of the country. A survey carried out by the marketing magazine “Largo Consumo” has shown that seventy out of every hundred Italian consumers know about organic products. Forty of those consumers have purchased them, and four do so regularly (at least twice a week).

The main products consumed are cereals with 58% of total organic volume and fruit (25%).

A very large share of organic fruit and vegetables is exported to other EC countries (mainly northern Europe) and Switzerland: 50 percent of the vegetables produced and 60 percent of the fruit.

The following table shows the distribution of import/export by product:

Table 15-1: Distribution of Italian import and export by product

	Import	Export
	%	
cereals	0,71	29,46
vegetables	15,13	2,14
fruit	44,19	19,59
wine		48,12
milk and milk products	38,88	0,69
beef	0,71	0,00
pork	0,39	0,00

Source: OMIaRD 2002, Analysis of the European Market for Organic Food

15.2 Structure of national statistic/data providers in agriculture

Surveys were sent to 28 institutions: 19 private, 2 private no-profit, 4 governmental and 3 semi-governmental, as shown in the following table. In spite of the lack of response (only 8 replied) all types of institutions are represented (2 for each group).

Table 15-2: Overview about surveyed institutions

Type of Organisation							
	Governmental	Semi-Governmental	Non-Governmental	Private (non profit)	Privat (Profit)	TOTAL	
Contacted	4	3	1	2	19	29	
Responded	2	2		2	2	8	
Overall response rate						28	
Field of Activity							
	Market research	Primary statistical DC	Secondary statistical DC	Public administration	Certification	Research	Specialist interest group
Responded (multiple entry possible)	1	6	3		1	3	2

15.3 Information about the surveyed institutions

In the table below are indicated the collected data of the 8 organizations which responded. After a brief presentation of each organization is given:

Table 15-3: Institutions which run DCPSs and level of data collection

Level:	IAM	ICEA	ISTAT	INEA	FIAO	PRAGMA	CONSORTIUM	ARM	ISMEA
Farm level	X	X	X	X	X			X	
Wholesale/processor		X			X		X	X	
Retail level						X	X	X	
Trade (import/export)						X	X		
Consumer level						X	X		
Whole production									
Policy relevant indicat.									X

15.3.1 IAM (Mediterranean Agronomic Institute)

IAM is a semi – governmental organization whose main functions are research and education. It carries out its activities in:

- Training high ranking officials
- Implementing applied scientific research
- Promoting local partnerships

It is funded by user-paid services and other kinds of funds.
Its principal aim is to collect and analyse data for distribution, through reports and web sites. Data are collected for crop products at the farm level.

15.3.2 ICEA (Ethical and Environmental Certification Institute)

ICEA is a certification body for organic farms. It is financed by voluntary subscriptions. Data collection is not its major task but it collects data at farm and processing levels for crop and livestock products.

15.3.3 ISTAT State Institute of Statistics

The State Institute of Statistics is a partner of Eurostat. It is a governmental organisation, financed by taxes, user paid services and other contributions from other organizations. Its main objectives are primary statistical data collection, checking/processing, storage, analyses and reporting. In addition it studies new methods for the collection and processing of data. Data are collected for crop products (fruit, vegetables, cereals, oil crops) and livestock products (meat and animals, milk, eggs, wool, hair, mohair) at farm level. Istat reports contain statistical graphs and tables on crop and livestock products.

15.3.4 INEA (National Institute of Agricultural Economics)

Inea is a semi-governmental organization, whose main purpose is primary statistical data collection and research on it. Inea acts as liason agency between the Italian State and EU for Italian FADN. It is financed by the Eu, Italian government funding and by research projects.
Inea's main aims are primary statistical data collection, checking/processing, storage, analyses and reporting.
Organic production and market data work is within a sub-sample of Organic Farms of the Italian Farm Accounting Data Network.
Data collected in co-operation with Italian Regions regard crop and livestock products at farm level and are distributed through reports and web sites. Data are available to the public and are free of charge.

15.3.5 FIAO (Organic Agriculture Italian Association)

Fiao is a private no profit organization, it's a representative organization of the main institutions in the organic agricultural sector (certification bodies, organic farmer associations, consumer associations, international exhibitions)
The main purpose is the collection of primary and secondary statistical data and it is an organic specialist interest group. Fiao is financed by voluntary subscriptions and by user-paid services, and it focuses on the collection, checking/processing, storage, analyses and reporting of data.
Organic data are collected for crop, livestock and processed products at farm and processing levels.

Distribution of data is through web sites and contains trends and statistical graphs and tables.

15.3.6 ARM

ARM is a special part of a CAMERA DI COMMERCIO of Rome financed by public funds. Its main function is primary statistical data collection and other farm services. The major focus of ARM with respect to statistical data are: data collection, data checking/processing, storage, analysis and reporting.
This organization collects data at farm, wholesale distribution and retailer levels, for crop, livestock and processed products.
Data are distributed trough web sites and Arm's reports contain market reports and analysis and text interpretation.

15.3.7 CONSORTIUM

Consortium is a private no-profit organization financed by taxes and is a specialist interest group with organic farms as its main interest. Organic production and market data are organized in a separate department where data are analysed at processing, wholesale, trade, consumer and retail levels.
Data are distributed trough web sites and the information is available to restricted user groups and only some of it to the public and is free of charge.

15.3.8 PRAGMA

Pragma is a private market research company. This organization collects and analyses data on crops and livestock products at wholesale, trade and consumer levels. Its data are not available due to the privacy laws.

15.3.9 ISMEA

Ismea is a non governmental financed by public founds and user paid servicies which main functions are market research, primary and secondary statitstical data collection. Data collection and data analysis are the major focus of ISMEA with respect to statistical data. Organic production and market data work is organized in a separate office.
Data are collected for crop products, livestock products, alcoholic beverages and processed products at farm level, processing, wholesale and consumer level. Ismea reports contain trends, market report and analysis, statistical graphs and tables and text interpretations. Data are available publicly and free on charge and publicly on payment.

15.4 Institutions which run 'Organic DCPS'

All organizations which replied run an organic DCPS a-part from Pragma.

15.5 Results of the second stage inquiry

The detailed second questionnaire was sent to the eight institutions, which answered the introductory questionnaire. Most of them completed the farm level questionnaire, whereas only two from the wholesaler/processor level, only one at import-export level and one at retailer level.

15.6 Detailed information about DCPS which include organic data collection

15.6.1 Farm Level

Italian FADN: INEA

The statistical scope of FADN comprises economic results (income, costs, price data, etc.)
of farms classified by size (UDE) and product (OTE). It covers both organic and total data. The FADN system is based on the representative approach, the sampling plan is theoretically representative, but actual farms are chosen on a voluntary basis. For the year 2001 the Italian FADN sample had 15.047 farms of which 13.914 used traditional agriculture and 352 were totally organic, 47 were in conversion and organic 41 were totally in conversion; 531 were partially organic 82 partially in conversion and 90 partially in conversion and organic. The sample is representative for specific types of farms and region. Data quality management system used is the computerised plausibility check. Results are distributed trough reports and Internet/homepage.

Strength: The Italian FADN data are the only economic accounting and structural data available at farm level collected with the same methodology for the whole country.

Weakness: The sample is not random; the sample is not selected with the intention of analyzing the organic sector. Thanks to an agreement among INEA, Italian regions and the national statistical office, from the year 2003, a random sample taken from the last census will take place.

Price database: Azienda romana Mercati

The scope of this DCPS is a collection of production prices of specific types of organic product. It covers only organic data.
The data collection method is based on representative surveys but lacks representation for area and type of farmer; there is a visual inspection by experts as a system for data quality management and monthly data are collected.
Strength: It is a unique data system;
Weakness: It lacks representative samples.

FIAO Database: FIAO

Statistical data collected regards farm structure and output: the segmentation criteria are the different group of product and region.
DCPS cover only organic data, and the method of data collection is a census for statistical purposes and estimation by experts based on a representative sample; 100% of area is represented; for data quality management and there is a visual inspection by experts and “triangulation”. Data are collected at least once a year and distributed trough reports.

Strength: Representative and the source of data is through authorized control bodies.
Weakness: Different type of data system collection through authorized control bodies. There is a project for a National Inspection Body in collaboration with different types of agricultural statistical institutions

Farm structure: ISTAT

ISTAT has two different types of DCPS: Total: Survey on the structure of agricultural holdings (1) and Organic: Survey on organic agriculture (2).
Regarding first DCPS which covers both organic and total data
The statistical data collected regards accounting of individual farms and farm structure; the segmentation criteria are according to farm size/type product group and region.

The data collection method is based on representative sample surveys covering 5% area and 3% of farms; it is possible to compare organic and total data. Data are collected less often and distributed trough reports, and internet/homepage
Regarding “second” DCPS which cover only organic data.

The statistical data collected regards accounting of individual farms and farm structure; the segmentation criteria are according to farm size/type product group and region. The method of data collection is a full administrative coverage survey, not based on a representative sample, the data quality management is a computerized plausibility check, visual inspection by experts and “triangulation” Data are collected at least once per year and distributed trough reports and internet/homepage.

Strength: Full coverage sample;
Weakness: Administrative data. They hope to harmonize their data with international organizations.

Winbio – ICEA

Statistical data collected regards farm structure and output: the segmentation criteria are the different groups of farm, product and region. DCPS cover only organic data.
The method of data collection is census by registration and data quality management I performed by visual inspection by experts Data are collected monthly and are distributed trough reports and newsletters.
Strength: Innovative system of DCPS;
Weakness: Lack of spatial representation.

IAM organic data collection: IAM

Data collected regards only accounting and farm structure but it isn't possible to segment different types of data.

15.6.2 Wholesaler Level

Organic database: Consortium

The name of the DCPS is Greenplanet Archives, it covers total and organic products related to both processors and wholesalers. Criteria applied to segment data are country/region of origin and many important markets
For different kinds of products data are collected relating to trends/forecasts in the different levels of the supply chain, except for stocks/reserves and storage volume.
the DCPS.

Data are collected weekly and cover whole the population and allows a direct comparison between total and organic products. Data quality is managed by a computerized plausibility check, and by visual by experts for total products and inspections by experts for organic products.

The principal barrier for integration is the **voluntary basis of DCPS.** The weaknesses are the source and the fact that it is free of charge. The strengths are the full coverage and the fact that it has about 18.000 subscribers;

Price database: Azienda romana Mercati

DCPS refers to data on prices for the wholesale market. Criteria applied to segment data is quality. Data are collected at the level of processing industry, and covers only the organic sector.

Data cover an egg sample of population based on a representative approach. Data are collected monthly, their quality is managed by expert and they are distributed trough Internet/homepage. The main advantage seems to be its unique system; its disadvantage is its lack of representation.

15.6.3 Import / Export Level

Database: Consortium

This DCPS is used for export data concerning the EU and Third World country trade, collected according to product group, country of destination and sales channel in the country of destination. Data are collected at the level of large wholesale markets and processors and packers and cover only the organic sector.

The method used is the collection of third party surveys, procedures and grey papers for both national and international trade. This method is not based on a representative sample or percentage and it does not allows any comparison with total products. The system for quality management is visual inspection by experts. Data are collected monthly and distributed trough Internet/homepage

15.6.4 Retailer Level

Price database: Azienda romana Mercati
It collects data on consumer prices, and there is no segmentation criteria. DCPS covers only the organic sector, and its data refer to a sample of population but it has a lack of representation, so it is impossible to allow direct comparison between organic and total products. The quality management system used is visual by experts. Data are collected monthly.

The main advantage seems to be its unique system; its disadvantage is its lack of representation.

15.6.5 Consumer Level

Panel Ismea – ACNielsen for food household purchase: ISMEA

Data collected are: penetration of products, consumer expenditures, consumption volume, and purchase frequency. It is possible to segment different types of data according to buying bheaviour, with the choise of sales channel like criteria, according to socio demographic criteria (age group, household income), number of family components, to spatial criteria and to produscts (differentation by products groups possible).

Organic data is non included and distinguishable in the DCPS because the survey was set up in 1995 for total food purchases and it is based on a methodology that makes quite difficult register separatly organic purchases. For this reason starting from 2000 it was completed with a different survey referred only to organic products with a EAN code.The panel is representative of the universe of Italian households. Data are collected monthly using the household panel like the method of collection. Systems for quality management are visual inspection by experts, computerized plausibility check and triangulation. Data are disseminated by newsletter and internet-homepage.

Strength: high quality data due to the collection system based on the EAN codes scanning; collection frequency.
Weakness: only EAN products collected; it does not cover all the food consumption, being excluded extra-domestic purchases and the purchases made in the second houses

15.7 Conclusion

One of the main obstacles for the development of organic agriculture in Italy is the lack of information due to difficulties for the access and collection of existing data, which is sometimes not available. There are different organizations that have data on organic sector, but only for their own needs without a unique system of representation. According to DL 220/95, the Ministry of Agriculture and Regions collect data which originate from two sources: farmers and different control bodies.

Nowadays there is a different information and organizing framework between regional, national and private organizations. Control bodies data could be considered more reliable due to their relationship with farmers and their different DCPS. In 1993 The Ministry set up a data bank “BIOL” made up of informative records but is unable to interface with Control DCPS Bodies.

Among Regions there is a heterogeneous situation because only a few of them are in possession of DCPS on organic data; so there are no basic conditions for obtaining homogeneous, audited and comparable data.

At present organic data referring to farm structure and income, crop areas and yield, are incomplete with no quality warranty. Regarding Import-export information there are only some private data bases at local level s and on the price situation there is an interesting DCPS.

During the last few years some interesting initiatives have been carried out like the establishment of a National Economic Inspection Body on the organic sector and a National Committee promoted by ISTAT aimed at finding solutions for a homogeneous and unique DCPS at a national level.

16 Latvia

Country report

LATVIA

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16.1 National relevance of organic farming

Organic farming in Latvia covers 24767 ha, which is 1% of UAA. (10217 ha of organic farms, 7115 ha in first year of conversion and 7435 ha in second year of conversion). Organic production is lead in 575 farms 0,46% of all farms number - (225 organic farms, 130 in second year of conversion and 220 farms in first year of conversion). Organic food market in Latvia is locally oriented. According Selegovska and Degola (2003)
1) demand and number of consumers in Latvia have grown, but;
2) prices of organic products are rather high;
3) entering into market of organic products is still complicated, marketing channels are not organized; and
4) majority of consumers do not recognize organic products.

The premium price hardly exist and the Latvian consumer express little interest in organic products (Data of "Environment Quality" on 1.08.2003 in Organic farming in Latvia, E. Selegovska and L. Degola http://www.safonetwork.org/publications/)

Almost all products are sold on domestic market, only few enterprises export their products. There were two enterprises – ''Zelta Klingeris" and "Kelmeni" that exported their products in 2002 (Barskina I., personal communication in 2002)

16.2 Structure of national statistic/data providers in agriculture

The introductory questionnaire was sent to contact person in Latvia and distributed within the country. There were 7 institutions that expresses interest in joining EISfOM.

Latvian Association of Organic Agricultural Organizations is a NGO's with broad scope of activities - market research, reporting to business, research, education, primary statistical data collection, specialist interest group (consumer, environment, organic), public administration, media (in field of farming, food industry and public). As NGO's is financed by membership fee.

Latvia University of Agriculture, Department of Economics is a semi-governmental organization which is financed by taxes. Main activity is research and in statistics comprises data analysis.

Zaubes kooperativs, Meat Production Unit is organization with main purpose of market research. Statistics research consists of data analysis. It is financed by user-paid service.

Latvian Association of Organic Agricultural Organizations (branch in Cesis) is a NGO's financed by voluntary subscriptions and donations. Main purpose is specialist interest group of organic farmers. Statistics issues contain only data collection.

Latvia University of Agriculture, Research Centre "Sigra" is a semi-governmental organization and financed by contracts with organizations and by scientific projects. Main purpose is research and specialist interest group of organic farmers. It covers data analysis and dissemination among statistical issues.

AMPC, Marketing Unit is a semi-governmental organization. Founds for activities are collected by projects and user paid service. They focus on market research, primary and secondary statistical data collection, research, education.

Food and Veterinary Service, Food Surveillance Department is a governmental organization financed by taxes. Main purposed is primary statistical data collection, which covers data collecting, analysis and dissemination.

16.3 Results of the second stage inquiry

We received the Q2 questionnaires back from Food and Veterinary Service (FVS), Food Surveillance Department with the information that they have internal database = a register of organic farms.

Additional information was obtained via e-mails:
FVS – database on Control and Surveillance Objects is a database that collects information provided by the certifying units about number of agricultural holdings, other organic operators, crops and livestock. FVS publishes only resume of that information and register of producers. FVS gathers data according to FSS. Statistical Bureau of Latvia (SBL) operates FADN that includes data from couple of organic farms and they could be separated but such information could not be valid for generalization.

16.3.1 Farm Level

Latvia University of Agriculture - Department of Economics
Economic and Financial Conditions of Organic Farming

The DCPS collect data on basic farm structure, size (ha), experience in organic farming (years), motivation to convert into organic, production, products groups. Organic data is integrated and distinguishable from total data. Sample survey *covers 60% of organic farms.* Farms which are not members of Latvian Association of Organic Farming Organizations (therefore did not have their addresses) are not included. Computerised plausibility check and visual check by experts are included in quality management system. Data dissemination undergoes by reports, newsletter, and conferences proceedings - mostly free of charge.
Thera are many difficulties in receiving addreses of organic farms for research needs from state institutions, certification bodies and even from Latvia Ministry of Agriculture. Other problem is low possibility to organizing survey that depends on the financial reseources of different projects. The next survey is planned for the end of 2004, but for next years it is under uncertainty.

16.4 Conclusions

The data collection system in Latvia is rather poor. Organic data collection is not included in the statistical research yet. The very basic administrative information on organic sector is gathered by the Food and Veterinary Service (FVS).

17 Liechtenstein

Country Report

LIECHTENSTEIN

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17.1 National relevance of organic farming

The Principality of Liechtenstein is the smallest country in Europe with a size of only 160km^2, but it is the country with the most organic agricultural area and organic farms (in %), compared to the total size of the agricultural sector. 26.4% of the total agricultural area is cultivated organically (984ha) by 41 organic farms (20.5% of all farms) (www.organic-europe.net/europe_eu/statistics.asp, 10/2003). Figures about the market size and the import and export values are not available. The organic market of Liechtenstein is closely connected with the one of Switzerland, as all farms are certified according to BioSuisse standards and a free trade agreement exists. Therefore a distinction of Liechtenstein`s organic market figures is not available. The organic volumes are small and foreign trade is marginal. Only a few organic products are "exported" (milk, meat, corn) to or imported from Switzerland (www.organic-europe.net/country_reports/liechtenstein/default.asp, 2002).

17.2 Structure of national statistic/data provider in agriculture

As Liechtenstein is a small country there are only a few institutions, which collect and process data: the Landwirtschaftsamt (Office of Agriculture), the Amt für Lebensmittelkontrolle und Veterinärwesen (Office of Food Control and Veterinary), the Vereinigung bäuerlicher Organisationen (Association of Rural Organisations), the Liechtensteiner Milchverband (Union of Liechtenstein`s Dairy Farmers) and the Hilcona AG. Hilcona AG is a processor for convenience food and ready meals.

Three of these institutions answered and send back the introductory questionnaire. The Amt für Lebensmittelkontrolle und Veterinärwesen (Office for Food Control and Veterinary) as well as the Hilcona AG only collect data for in-house purposes and therefore did not answer Q1.

17.3 Information about the surveyed institutions

The Vereinigung Bäuerlicher Organisationen (Association of Rural Organisations) and the Landwirtschaftsamt (Office of Agriculture) collect data on farm level about the agricultural volumes, accountancies, prices, etc. The Liechtensteiner Milchverband (Union of Liechtenstein`s Dairy Farmers) as well as the Vereinigung Bäuerlicher Organisationen collects data on processer level, especially on milk. There are only DCPSs on farm and processor level. Data collection on retail, import/export and consumer level and policy-relevant indicators are missing.

In the following these three institutions are described briefly.

17.3.1 Vereinigung Bäuerlicher Organisationen

The Vereinigung Bäuerlicher Organisationen (VBO) (Association of Rural Organisations) represents the interests of organic and conventional farmers in Liechtenstein and certifies organic farms for the special brand programme “BIO-Ländle”. The VBO is a non-governmental organisation with partly public financiation by taxes, voluntary subscriptions and user-paid services. It collects data on farm level and processor level (milk), especially about farm structure and income, but data collection is only a marginal purpose of the institution. Organic data is integrated in each department. The VBO is probably the most important data provider in Liechtenstein.

17.3.2 Landwirtschaftsamt

The Office for Agriculture in Liechtenstein is a governmental, tax financed organisation with the main purpose of public administration. Nevertheless data collection on farm level (agricultural area, crops) is an important task. Hereby organic data is integrated in each department. The results are disseminated by reports as status report about the agriculture in Liechtenstein.

17.3.3 Liechtensteiner Milchverband

The Union of Liechtenstein`s Dairy Farmers is synonymic with the dairy Schaan, which processes 99% of all milk, both organic and conventional in Liechtenstein. Therefore data collection is only a by-product of the main purpose of processing and trading milk and only for the company-intern statistics. As processing company, the the organisation is financed by trading. Organic products are integrated within each department.

17.4 Institutions which run ‘Organic DCPS’

The Vereinigung Bäuerlicher Organisationen, the Landwirtschaftsamt and the Liechtensteiner Milchverband run DCPSs, in which organic data are collected in special and distinguishable from total one.

17.5 Results of the second stage inquiry

The three institutions, which answered the first questionnaire have been contacted to give detailled information about their data collection and processing system by a second questionnaire. The Liechtensteiner Milchverband did not answer Q2, as data collection and processing is not a main purpose of the organisation. Both the Vereinigung Bäuerlicher Organisationen and the Landwirtschaftsamt sent back the questionnaire on farm level. DCPSs on other levels does not seem to exist in Liechtenstein.

17.5.1 Farm Level

Landwirtschaftsamt

The DCPS of the Landwirtschaftsamt (agricultural office) is called *Lawis* and collects data both on total and organic production. Organic data is integrated within the DCPS and distinguishable from total data since 2002. Therefore the DCPS offers a total overview about the production sector in Liechtenstein. Accountings of individual farms (e.g. income), the farm structure (hectares, animals), the physical quantities (output) are surveyed. A segmentation of data is possible according the size of the farm and product groups (relevant products). The data are collected at least one time per year by a census by registration and therefore a direct comparision of organic data with total data is possible. The quality of data is controlled by a computerized plausibility checks and by experts. All data are confidential but the information is disseminated by the annual report of the government. The DCPS is not awarely harmonized to an international DCPS. There are national data supply networks, the cantons also use this DCPS. The DCPS has several strengths: it is user-friendly, easy to handle and manifold printouts are possible. There are plans for the development of the DCPS, but details are not mentioned. Regarding the advantages of the DCPS (representativeness, quality management, user-friendly, …) it could be a case study example, but regarding the number of farms and the size of Liechtenstein it is not reasonable to choose it as case study.

Vereinigung Bäuerlicher Organisationen

The DCPS of the Vereinigung Bäuerlicher Organisationen (association of rural organisations) is an accountancy system both for organic and total data. Organic data is integrated in the DCPS and distinguishable since 2000. The accounting of individual farms (e.g. income), the farm structure (number, hectares, animals, labour) and the prices (input for total and organic products; output only for organic products) are registered. The data can be segmented according the size of the farm and the farm type. The method of data collection is a census for statistical purposes, at least once per year. It is a representative approach. A comparision between organic products / production and the total production is possible. Some information are confidential, but the most data are available freely and are disseminated in reports. The quality of data is controlled by a computerized plausibility check. The DCPS is not harmonized to an international DCPS because there is no demand of an international system and the organizational effort is too big. Further a national data supply network does not exist. The strength of the DCPS is the representativeness, the weakness is the number of farms which are covered: as Liechtenstein is a very small country and there are not many (organic) farms, only 125 conventional and 35 organic farms are covered in the DCPS. There are not any plans for a further development of the DCPS. This weakness – the small number of farms – makes the DCPS not suited as case study.

17.6 Conclusion

The availability of data on the organic market is limited. The production sector is covered well and information on organic and total agriculture is available. Regarding the processing sector, only milk is covered adequate. Other processing sectors are not respected by any data collection. On wholesale level, import/export, retail level, consumer level and policy-relevant indicators no DCPS exist. The quality of the existing data collection and processing systems on farm level is good. The method of data collection is representative (census) and the quality of data is controlled. Both DCPSs deliver valid information both on organic and total agriculture. The problem is of both is no own fault, it is more the small size of the country Liechtenstein. And this could also be the reason why other DCPSs on other levels do not exist. But for a holistic illustration of the organic sector in Liechtenstein except data on production, also data on trade, consume and retailing should be gathered. Here is room for improvement.

18 Lithuania

Country report

LITHUANIA

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18.1 National relevance of organic farming

In 2003 number of controlled organic farms in Lithuania reached 695 (0,26% of all farms), with area of 24280 hectares (0.7% of AUL). An increase in farm number and area in comparison with 2002 year is respectively 775 and 280%.

Organic food market is still at the very early stage of development and there are no estimates on the size of organic market in Lithuania. Major organic products are: cereals (40%), potatoes (25%), and vegetables (12%). According the estimates vegetables and potatoes constitute 60% of total organic production value in Lithuania. The most popular cereal crops are rye and wheat (rye, which is grown by 86% of the Lithuanian organic farms, is popular because rye bread is a traditional Lithuanian product).

In livestock production milk is considered as the main organic product. Almost all milk, beef and poultry is sold without organic label and price premium (Agriculture In Lithuania 2000. Development and Prospects). Only 45% of certified ecological products were sold as organic, with premium price about 20-40%. On the national market the main sale channels are various fairs and market-places (40 %).

Export of organic products is low and there is no data on the size of export. Main export products are berries and honey (www.tm-lt.lt). The domestic demand is higher than supply so there is a significant export of organic products.Imported products (mainly fruits, vegetables, flakes and others) form about 20% by value of organic products in supermarkets. Main countries of import are France and the Nederlands.

18.2 Information about the surveyed institutions

The introductory questionnaires were sent to 6 institutions including the certifying unit, Ministry of Agriculture and the producers associations but just one of them answered.

Statistics Lithuania is a governmental organization financed by taxes. Primary (and secondary – not stressed) statistical data collection is the main purpose and is focused on data collection, processing, analysis, archiving as well as dissemination.

Lithuanian Association of Ecological Agriculture "Gaja" is a producers' organization (NGO) that collects some data on organic farming. A voluntary subscriptions and donations are the source of funds for their activities.

18.3 Results of the second stage inquiry

Due to low respons the set of second questionnaires was sent to the same institutions as the introductory questionnaires. There were also telephone calls made to all the institutions that were identified as relevant data collectors. As a result there

were 7 questionnaires sent back from various departments of Statistical Office of Lithuania.

The existing system of data collection in Lithuania allows distinguishing only organic farm level data in FSS. However, the FSS started in 2003 so there was no much information on it in the questionnaire.

18.3.1 Farm Level

Statistics Lithuania

The DCPS carries out data collection in FADN, FSS, Production statistics, farm price statistics and supply balance sheet.

a) Farm Accountancy Data Network (FADN)
There is only total data collected and organic data is not distinguishable from it. It covers 1200 farms – no data is available about number of organic farms. This sample is representative for regions and farm types. Quality management system includes computerized plausibility check, visual check by experts and triangulation. Data is disseminated by reports.

b) Farm Structure Survey (FSS)
The DCPS started in 2003. Organic data is integrated, but is not distinguishable from the total data. Comparison organic and total data is possible. Methods are standardized for FSS. The survey covered 10% of area and 8% of farms but the share of organic farms is unknown but there were 300 organic farms included) Since the DCPS has just been initiated in Lithuania, there were no quality management system mentioned but computerised plausibility check; visual check by experts; triangulations. Data is segmented by product groups (except organic meat, dairy products, eggs and honey), farm type/size or region (NUTS 1,2,3). Results will be available at the end of 2004.

c) Production statistics
Data is collected on farm and processor level. 10% of farms area and 6% of farmers are covered. Organic data is not recorded separately. There is no defined system for data quality management. Information are disseminated by reports, newsletter and Internet – Yearbook “Agriculture”

d) Farm Price Statistics
Total data only is collected on processor and farm level. Organic data is not recorded separately. Organic data is not distinguishable. Information is disseminated by reports, newsletter and Internet - Yearbook “Agriculture”. Quality management systems includes computerized plausibility check, visual check by experts and triangulation

e) Supply balance sheet.
Only total data is collected on processor and farm level. Organic data is not recorded separately and is not distinguishable. Reports, newsletter and Internet - Yearbook “Agriculture” is main channels of information disseminations. Quality management

systems include computerized plausibility check, visual check by experts and triangulation.

18.3.2 Import / Export Level

Statistics Lithuania

The DCPS collect data on import and export level. Only total data is collected, organic one is integrated, but is not distinguishable from the total data.

Administrative demand is the main reason for data collection. Data on trade within Europe and third countries is collected monthly (not representative data). Data includes level of import and export and is differentiated by product, product group, country of origin and country of destination. Quality management systems comprise computerized plausibility check, visual check by experts and triangulation. Information is disseminated by newsletter and Internet, quarterly and annually, database on CD. Data is available online monthly from Custom Service. Some data is confidential, some user-pay or free of charge. Timeliness and accuracy is strengths of the DCPS. Main weakness of it is old and not convenient electronic data processing system. The DCPS has plans for development electronic data processing system in 2004.

18.3.3 Consumer Level

Statistics Lithuania

Data on the consumer level is collected by household budget survey. Only total data is gathered and organic data is integrated, but is not distinguishable from the total data. Main reasons for this are little or no demand from users for separate organic data and difficulties for respondents to distinguish organic products.

Policy and administrative demand were the main reasons for data collection. It's possible segmentation by age group, family types, household income, education level and NUTS. No segmentation by buying behaviour exists. Wide range of product groups is included. Data cover sample of population 0,6%, and it is based on representative approach, collected monthly and use household diary as methods. Quality management systems include computerized plausibility check, visual check by experts and triangulation. Data is disseminated by reports and is free of charge but mostly confidential. Main weaknesses of this DCPS – the households with the highest incomes are not represented.

Additional information

According the information provided by EUROSTAT data collection on organic farming covers:

Area of organically farmed land and area in conversion, number of animals (heads), processors of organic products, organic crop and animal production, organic seed

production, trade of organic products, prices of organic products (at all stages), distribution outlets for organic produce (e.g. specialised shops). This data is provided by EkoAgros – certifying body in organic farming.

18.4 Conclusions

The availability of organic data situation in Lithuania is rather poor and similar to other CEE countries but we received no information on the database that should exist for organic farms. There was no response from EKOAGROS – the only certifying unit in Lithuania that should collect data on organic sector.

19 Luxembourg

Country Report

LUXEMBOURG

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19.1 National relevance of organic farming

At the end of 2002 Luxembourg had almost 2.400 hectares of farm land that was certified organic and/or in conversion. All together they represent about 2% of the Luxembourg national agricultural area. The number of organic farm on the end of 2002 is about 50. The organic farm level production and certification in Luxembourg is achieved by two organizations: Biolabel, which is the main part of the organic sector, and Demeter, as an international organization with a Bio dynamic approach. Due to development in other industrial parts of the Luxembourg's society, the agricultural is decreasing. Although organic farming is a part of it, it still remains stable in area and number of farms.

19.2 Structure of national statistic/data providers in agriculture

Main level	Administration des services techniques de l'agriculture (ASTA) http://www.asta.etat.lu
	Service d'Economie Rurale (Statec) www.statec.lu
Farm level	Beratungsstelle für biologische und biologisch-dynamische Landwirtschaft, Oikopolis http://www.biolabel.lu
	Verain fir biologesch-dyn. Landwirtschaft http://www.demeter.lu
Processor and Wholesaler level	Bio-Bauerngenossenschaft BioG biog@pt.lu
	Bio-Gros SARL

Two organizations in Luxembourg returned the questionnaire from EISfOM, as relevant parties in the scope of data collection on organic farming. One of them, ASTA, is operating governmental on a main level. They are collecting international harmonized organic data with a reg. 2092/91 harmonization. Right now they do not disseminate this data in any way.

The other mentioned institute that returned the questionnaire is Statec. They are an independent statistical organization that operates on demand of the government of Luxembourg.

ASTA is the organisation in Luxembourg that collects organic data and is harmonized. Alternative is Bio label and Demeter, who are covering the organic agricultural sector in Luxembourg.

Although they did not react on the EISfOM survey and no information is achieved throughout the internet, both should be capable of delivering significant information on controlled farmers.

19.3 Institutions which run "Organic" DCPS

Like mentioned before, ASTA is the only organisation that has a known organic DCPS.

19.4 Detailed information about DCPS, which include organic data collection

19.4.1 Farm level

Asta

The DCPS delivers organic data and is called "Organic Farming". Its scope is farm structure level. Data is collected since 1988. Only data for organic agricultural is available and this for the variables: number of holdings, crop areas in hectare, crop quantities, livestock numbers, output of livestock products and numbers of processors and importers. There is no segmentation on regional level. The DCPS covers organic data only. No explanation is given but there is another DCPS with statistics covering the total agricultural sector. This DCPS has no link with any FSS. The method of collecting data is through inspections on organic farms. Representation of the farms is 100%. Comparison with the DCPS that covers the total agricultural sector is unknown.

The data in this DCPS is not in any way disseminated. The DCPS of Asta is harmonized for an international system by the reg. 2092/91 regulation. Strength of this DCPS is the flexibility because it's in excel format. The weakness is the not official state of this DCPS. In the future Asta is planning to arrange and collect data on produced organic quantities. This DCPS could be interesting as a case study. The reason for that is because of two challenges: How to combine this DCPS with the total agricultural and how to collect data on a regional level.

Service d'Economie Rurale

There are given three names of this DCPS: Statistiques de la production agricola, Statistiques des prix agricola and Comptes economiques d'agriculture. Its scope is farm structure level. There is no segmentation on regional level. Segmentations: Several products, production with import export. The DCPS covers total data only. There is another DCPS with statistics covering the organic agricultural sector. Representation of the farms is 100%. Comparison with the DCPS that covers the total agricultural sector is unknown.

The data in this DCPS is disseminated through report and through Internet. This DCPS is harmonized for the international system of Eurostat. Strength of this DCPS is the flexibility because it's in excel format. The weakness is the not official state of this DCPS. In the future Asta is planning to arrange and collect data on produced organic quantities. This DCPS could be interesting as a case study. The reason for that is because of two challenges: How to combine this DCPS with the organic agricultural and how to collect data on a regional level.

19.4.2 Other actor levels

Wholesaler/processor level	No DCPS on this level
Import/export level	No DCPS on this level
Retailer level	No DCPS on this level
Consumer level	No DCPS on this level

19.5 Conclusion

Organic agricultural in Luxembourg is in the hands of two organizations, Biolabel and Demeter. Both are operative on the farming level and don't supply data of the organic sector. The only data available is at ASTA but they don't disseminate data yet.

On all other levels of the organic chain no data collection is known to be available. It might be possible to achieve something at Statec, but at this point they only collect price statistics and there is no separate organic data collection.

20 Malta

Country Report

MALTA

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20.1 National relevance of organic farming

In Malta there is no information about certified organic farms and land.

20.2 Structure of national statistic/ data provider in agriculture

An introductory questionnaire was sent to the Ministry for Rural Affairs and the Environment.

Ministry for Rural Affairs and the Environment

There is a Organic Farming Unit inside the Ministry whose main functions are public administration, certification and education. Regarding statistical data its major focus is data reporting and distribution organized in a separate department with close co-operation from the National Statistics Office. They are still in the process of setting up a primary and secondary database.

20.3 Conclusion

We do not have any information about data collection in Malta.

21 The Netherlands

Country Report

THE NETHERLANDS

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21.1 National relevance of organic farming

At the end of 2003 the Netherlands had a little more than 1.400 certified organic farmers. Together they represent about 41.000 hectares, which is 2% of the national agricultural area.

The Netherlands is a country of exporting companies. The last few years a lot of the produced organic products were exported to the U.K. and other countries. Because of the changed import policies of these countries (minor import, more products from their own countries) the major part of the produced organic products has to be sold in the Netherlands itself. At this moment the effects of this is too much supply. The market has difficulties with absorption of the organic production. Additional problem is the war on prices that's running in the retail market since the end of 2003.

21. 2 Structure of national statistic/data providers in agriculture

Five organizations in the Netherlands returned a questionnaire from EISfOM, as relevant parties in the scope of data collection on organic farming. They are: Skal, National Statistics (CBS), Dutch Dairy Board, LEI Wag-Ur, and IRI / GfK. They don't cover all the aspects of the data chain on organic produce.

21.2 Information about the surveyed institutions

All of the institutions are dealing with strength and weakness.

Skal isn't really into delivering data and is asking a fee for it. CBS and LEI do have harmonized systems but are some late with data. The Dutch Dairy Board is only specified on milk and milk related products and might therefore be less interesting as a source and IRI is capable of delivering retail information about consumers but don't have any data on other market channels. As a full commercial organization they will ask a fee as well. GfK is an organization that did not return the questionnaire but is capable of delivering data on organic through the use of a consumer panel.

21.2.1 Skal

Skal is an independent organisation that supervises and certificates organic farming in the Netherlands. They are public funded and working on demand of the ministry of Agricultural and owner of the "EKO" mark. Skal started the controlling to guarantee the origin of organic farm products to consumers.
www.skal.nl

21.2.2 CBS

Statistics Netherlands (CBS) collects, calculate and disseminate data on all major businesses. The organization is public funded. On agricultural level they collect several variables. Organic farm structure is a part of that. They are responsible for National and some European official statistics.
www.cbs.nl

21.2.3 The Dutch Dairy Product Board

The Dutch Dairy Product Board is the largest agricultural export promotion organization. The board, a quasi-governmental commodity association, is financed by producer check off funds. The board passes some of these funds to the Dutch Dairy Bureau for export promotions. The Dairy Bureau promotes primarily cheese, and has a small budget for butter promotion. Most of the export promotions are directed toward other EU member states.
www.prodzuivel.nl

21.2.4 LEI Wageningen UR

The Agricultural Economics Research Institute (LEI) is the leading institute in the Netherlands for social and economic research on agriculture, horticulture, fisheries, forestry and rural areas. The core business at national and international level is the increasing integration of agriculture and agribusiness with the social environment. The LEI is part of Wageningen UR; a co-operative venture between the Agricultural Research Service, Wageningen University and Research in Practice. The LEI is private funded.
www.lei.wageningen-ur.nl

21.2.5 IRI

Information Resources, Inc. (IRI) is a sales and marketing research partner in the global consumer goods industry. They provide clients with consumer insight and market intelligence. For many clients, IRI now provides international data services covering over 20 countries, with data delivered in consistent formats and supported by an international service team. The data is based on scanning data from the retail. IRI is private funded.
www.infores.com

21.2.6 GfK

GfK is a sales en marketing research partner in the consumer goods industry. They provide clients with information based on a consumer panel of 4.400 families. The members in this panel are making a daily inventory of all their shopping's. To do that they use the ean codes on the products. If that's not available the members of the panel can use several GfK codes to inventory these products. Based on this panel GfK is having a DCPS from which data on the consumer level can be extracted.

www.gfk.nl

21.3 Institutions which run "Organic DCPS"

Organic DCPS can be found at Skal, CBS and LEI. There all in some way harmonized. Skal has a reg. 2092/91 harmonization, CBS has a FSS harmonization and LEI has a FADN harmonization.

All three organizations operate on a farm level so for this level all aspects of data collecting are covered and more or less available.

On the consumer level a DCPS exists in the combine of IRI and GfK. The bundling of the scanning figures of IRI with the consumer panel information of GfK is a unique DCPS to extract consumer data. LEI buys data from IRI / GfK for, among others, the fresh food categories bread, milk / cheese, meat, fruit, vegetables, potatoes and eggs. This data is disseminated in the Dutch EKO-monitor, which can be downloaded from www.platformbiologica.nl.

21.4 Results of the second stage inquiry

The response of the second questionnaire covers a good image of the Dutch situation on the collection of organic agricultural data. The response of relevant parties is almost complete.

21.5 Detailed information about DCPS which include organic data collection

SKAL:

- Reg. 2092/91 harmonized farm level organic DCPS

CBS:

- FSS harmonized farm level total and organic DCPS
- Not harmonized wholesaler/processor level total DCPS.
- Intrastat harmonized import/export level total and organic DCPS
- Not harmonized retail level total DCPS.
- Harmonized consumer level total DCPS.

LEI:

- FADN harmonized farm level total DCPS with some organic data
- Not harmonized price statistics level total DCPS.

Dutch Dairy Board:

- Not harmonized wholesaler/processor level total milk and milk related products DCPS.

- Not harmonized import/export level total milk and milk related products DCPS.

GfK / IRI:

- Not harmonized retail level total DCPS.

21.4.1 Farm Level Organic DCPS by Skal

1. Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?
Skal farm structure data: Organic agriculture data on a nuts 2 region level, separated in organic and in conversion. Variables: area in hectare, specific product and number of farms.

2. Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?
This DCPS only covers total organic sector data. Organic farms have to be licensed by Skal in order to use the "EKO" label.

3. Does the DCPS promise relative valid and reliable results?
The data is in Excel format and covers the complete 100% organic farming. No sample use. Representative for the variables: area and specific products. Due to mixed farming, comparison on the number of farms is less possible. Comparison with reliable data on a total product or farm level is possible.

4. How are the results disseminated?
Access to this DCPS is possible through the agency of the Dutch Ministry of Agriculture and payment. For 2002 and 2003 LEI collected these figures.

5. How is the DCPS harmonized or related to other superior DCPSs?
This DCPS is harmonized through reg. 2092/91 but not related to other superior DCPS. Still working on harmonizing with the FADN in which LEI is involved.

6. What was mentioned for the DCPS as main opportunities and barriers as well as strength and weak points? Are there plans existing to improve the quantity, availability, comparibility (harmonization) or quality of organic data? When yes, which plans does exist?
The strength is the flexibility of the data in Excel and the data is recent [second week January the whole previous year is known]. The weakness is the incompleteness of the number of farms, for which a guideline is still needed.

7. Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?
No. Because no statistical calculation method is used to gather this information. The data is reliable because the complete organic sector is included. No new or interesting methodologies are used.

21.4.2 Farm level total and organic DCPS by CBS

1. *Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?*
CBS has a Farm Structure Survey system for the agriculture in the Netherlands, named “Landbouwtelling”. This includes also the organic farming. There is no separating into organic and/or in conversion. Variables: area in hectare.

2. Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?
This DCPS covers the organic sector and the total agricultural sector.

3. Does the DCPS promise relative valid and reliable results?
The data is in html format. The statistical coverage of this data is unknown. As a national statistical institute for a long period this data is to be trusted as highly accurate. It is representative for the variable: area.

4. How are the results disseminated?
Access tot this data is possible through their web page by selecting the Statline section. This is a windows based software application where statistical information can be found.

5. *How is the DCPS harmonised or related to other superior DCPSs?*
This DCPS is harmonized.

6. *What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?*
The strength of this DCPS is that it can be accessed for free. The weakness is the use of unknown statistical methods and the time schedule of the data: This DCPS has some delay.

7. *Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?*
This DCPS might be interesting because there is an opportunity to combine several variables. For example: You can combine employment contracts with organic farming and compare this tot the situation in the total agricultural sector.

21.4.3 Farm level total and organic DCPS by LEI:

1. *Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?*
The LEI is collecting agricultural data by the standards of the Farm Accountancy Network (FADN) named “Boekhoudnet”.

2. Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?
This DCPS covers both total and organic data.

3. *Does the DCPS promise relative valid and reliable results?*
The numbers of farms in the DCPS are representative for 78% of the organic agricultural sector.

4. *How are the results disseminated?*
Access to this DCPS is possible by contacting the LEI.

5. *How is the DCPS harmonized or related to other superior DCPSs?*
This DCPS is harmonized.

6. *What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?*
The strength is the harmonization of the data. It's used for international purposes. The weakness is the time schedule. At this moment the available information covers 2001 and is starting to cover 2002. Another weakness is the average approach of the data. It's possible to adjust data on an average agricultural level, but it is minor specific.

7. *Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?*
This DCPS could be interesting as a case study on statistical methods to cover the whole organic sector.

21.4.4 Import/export level total and organic DCPS by CBS

This DCPS covers both total and organic sector. Its harmonized and called Eurostat External Trade Statistics Database: Comext. For that purpose it's collected since 1900. They started collected on an administrative, policy and commercial demand. Statistical method, used between countries of the EU, is called: Intrastat. Outside the EU the method is by data collection as a part of the customs procedures and partly by sending questionnaires directly to major trading companies. This covers 99% of the market. There is no data supply network. The data is collected on a monthly base. Some is free, most confidential. Import export types based on Eurostat and/or FAO. Collection involves EU and other countries. DCPS is collected on ports, borders and exporters. Differentiating is possible by product (groups), countries of origin and countries of destination. Al product groups are collected. Dissemination appears through the Internet. The quality management is through a plausibility check, a visual check by an expert and by triangulation. The strength of this DCPS is the rapidity and periodicity of the data. The weakness is the non-response. Plans for the future are tot reduce the non-response and to improve the detail level.

21.4.5 GfK/IRI DCPS with consumer and retail data

This DCPS cover both the total and the organic sector. The strength of this DCPS is the combined data from the retail scanning by IRI and the consumer panel data from

GfK. The result of this rather unique cooperation is the possible comparison of the two data sources. This leads in a more qualified set of consumer data. Differentiating is possible by products, by chain of selling and for conventional (total) and organic levels. Before this all was possible there has been a labeling job to label all EAN codes for organic or conventional.

21.5 Conclusion

To obtain the most recent data on the level of organic farms that's highly accurate data from Skal. Small problem might be that they charge a fee for it. At this moment it's not delivered to any international DCPS because the core business of Skal is to be a control institute and not a data supplier. Harmonizing and delivering to an international database should be made possible in the future. If you want organic data that's harmonized as FSS to an international database and is free of charge, you should collect farm level data from the CBS. But, the dissemination from this organization has a year delay.

Data on the level of organic wholesaler of processor is, when relying on the outcome of the two questionnaires in the survey, not yet available. Data on the level of import/export is only available on a combined total/organic DCPS by the CBS. This offers no alternative. Problem could be the confidentially of the data. Data on the level of retail and consumers is, when relying on the outcome of the two questionnaires in the survey, minor available in only the retail chain.

22 Norway

Country Report

NORWAY

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22.1 National relevance of organic farming

According to Debio, the Norwegian private, non-profit certification and control body, the number of certified organic farms including Demeter farms were 2466 farms in 2003 corresponding to an increase of 7 % compared to 2002. The total area of these farms was 38.179 ha of which 30.884 ha was certified organic and 7.295 ha was in conversion. From 2002 to 2003 the area of organic farms (including conversion area) has increased by 17 %. The organic area (including conversion area) corresponds to 3,7% of the total farming area in 2003, but the aim of the Government is 10 % in 2010.

Of the 2466 organic farms 1128 farms (46 %) were husbandry farms, mainly with cattle (dairy) and sheep production. The total number of organic animals was 30.930 in 2003.

Of the certified husbandry farms 30 % had dairy cows, 53 % beef cattle, 50 % sheep 5,7 % goats, 8.7 % poultry and 1,9 % pigs (a farm may have more than one type of animal production). Besides, there were 8 certified companies in organic aquaculture (4 fish feed companies, 3 aquaculture plants and 1 fish processing plant)

As a member of the European Economic Area (EEA) Norway has implemented the EU Regulation 2092/91 on organic production. The Ministry of Agriculture http://odin.dep.no/ld/engelsk/index-b-n-a.html has delegated the overall supervision of the inspection system laid down in the Council Regulation EEC 2092/91 to the Norwegian Food Safety Authority http://imo.mattilsynet.no/english/ on all levels from farm to retail and import. The certification and control of all organic producers from farm to retailer (including Demeter certified farms and enterprises) has been delegated to the private, non-profit organization, Debio http://www.debio.no .

Debio is responsible for the collection of FSS statistics on organic farms http://www.debio.no/section.cfm?id=1&subid=175 . Besides, it keeps a database on all farms, processors, retailers and importers producing or trading with organic products http://www.debio.acos.no/

In 2003 there were 371 registered food processors, packers, wholesalers, retailers and importers covered by the certification systems, which is a reduction of about 3 % compared to 2002. However, the number of certified organic products has increased from 2200 in 2002 to 2400 in 2003.

The Norwegian Agricultural Authority http://www.slf.dep.no under the Ministry of Agriculture is responsible for the development of organic production in Norway. It administers the subsidy scheme for organic farming and the Plan of Action for Organic production and trade. Besides, it is responsible for the collection of data for surveys on production and trade of organic products. The surveys are published on a biannual basis. http://www.slf.dep.no/index.asp?strUrl=1002482i&topExpand=1000065&subExpand=&sub3Expand=&sub4Expand= . It includes information on production of plant crops and animals (from Debio), amount produced of processed animal products (meat, milk, eggs) and amount sold as organic plus prices compared to conventional similar products, amount of cereals for food and feed delivered to the mills and prices of

organic and conventional potatoes and vegetables. According to the survey for 2003 the production and sale as organic product of the most important food and feed products were:

Table 22-1: Production volumes and organic products (t) and share which is sold as organic

Organic Product	Amount in 2003	Sold as organic in % of the total production
Meat	1.150 t	13,8 %
Milk	20.736 t	30 %
Eggs	448 t	80 %
Cereals (2002-2003)	2.441 t	?

Source: Mgl noget om oeko – ikke oeko salg

22.2 Structure of national statistics/data providers in agriculture

The EISfOM introductory questionnaire (Q1) was sent out to 7 potential data providers of organic data (excluding The Norwegian Food Safety Authority, which is a partner of EUROSTAT). 4 organizations, Statistics Norway, the Norwegian Agricultural Authority, Debio and the National Institute for Consumer Research returned the filled in Q1.

In table 22-2 is given an overview of these organizations together with some other potential sources on statistical information and/or marketing of organic products.

Table 22-2: Overview of the most important data collecting and/or processing Norwegian organizations plus potential other sources on marketing of organic products

Name:	Type of organization	Level of data collection	Collection of "organic" data separately?
Statistics Norway http://www.ssb.no/english/	Governmental data collection	Whole sector Economy Environment	No, secondary data collector on organic agricultural statistics
Norwegian Agricultural Authority http://www.slf.dep.no/	Governmental authority	Processing / input manufacture Retail	Yes, production, market and price statistics on certain organic food products – share of organic products sold as organic.
Norwegian Food Safety Authority http://www.mattilsynet.no	Governmental authority	Farm level; Processing /input manufacture Wholesale; Retail	No, only secondary data collection from other sources
Debio http://www.debio.no/	Private, non-profit certifier and inspection body	Farm level Processor / input manufacture Wholesale Retail import/export	Yes, FSS data: organic farms, organic area, organic crop products, livestock products, Number and type of organic processors, wholesalers, retailers, importers etc.
National Institute for Consumer Research (SIFO) http://www.sifo.no/english/	Governmental research institute	Retail level Consumer leve Policy	Yes, for specific research projects, but not on a regular basis
Norwegian Agricultural Economics Research Institute http://www.nilf.no/Engelsk/Hoved.shtml	Governmental research institute	Farm level Processor level Policy	Responsible for collection and processing of FADN statistics

22.3 Information about the surveyed institutions

22.3.1 Statistics Norway http://www.ssb.no/english/

Statistics Norway under the Ministry of Finance, is the government agency responsible for collection, checking, processing, research in and dissemination of statistical data in Norway and for collaboration on statistical matters internationally. Statistics Norway publishes the following annual reports on agricultural statistics, based on input from various other sources:

- Agricultural Statistics http://www.ssb.no/english/subjects/10/04/10/nos_jordbruk_en/ containing data on holdings with agricultural area in use, agricultural and horticultural yields, livestock, meat production, organic farming, holders' investments, government subsidies, economic results etc. The lastest report from 2002 also contains a separate section with statistics based on the Sample survey of agriculture and forestry 2002.
- The farmers income and property http://www.ssb.no/english/subjects/10/04/10/nos_d293_en/ , which comprises figures for various incomes, income deductions, property and debt of farmers and their spouses.

Besides, Statistics Norway produces a full agricultural census every 10 years (last time in 1999) http://www.ssb.no/english/subjects/10/04/10/nos_jt1999_en/ . As an EEA (European Economic Area) member, Norway is obliged to carry out the same structural surveys in agriculture as member countries in the EU. The relevant EU legislation is the Council Regulation EEC 571/88 with later amendments.

22.3.2 Norwegian Agricultural Authority http://www.slf.dep.no/

Norwegian Agricultural Authority under the Ministry of Agriculture is responsible for the development of organic production in Norway. It administers the subsidy scheme for organic farming and the Plan of Action for Organic Production and Trade. It is also responsible for the collection of data for surveys on production, trade and prices of organic food products http://www.slf.dep.no/index.asp?strUrl=1002482i&topExpand=1000065&subExpand=&sub3Expand=&sub4Expand. The same data are collected for conventional agricultural products http://www.slf.dep.no/index.asp?startID=&topExpand=1000035&subExpand=1000038&strUrl=1000354i .The Norwegian Agricultural Authority also collects statistical information concerning the various subsidy schemes they are responsible for http://www.slf.dep.no/index.asp?startID=&topExpand=1000065&subExpand=&strUrl=1002884i .

22.3.3 Norwegian Food Safety Authority http://www.mattilsynet.no

The Norwegian Food Safety Authority is a governmental body, which was established on January 1, 2004 as a merger of the Norwegian Animal Health Authority, the Norwegian Agricultural Inspection Service, the Norwegian Food Control Authority, the Directorate of Fisheries' Seafood Inspectorate and local government food control authorities. The Norwegian Food Safety Authority supervises and controls the private body, Debio, which has been delegated the responsibility for carrying out the certification and control of organic farming and labelling of organic

food products in Norway. Before January 1, 2004 the Norwegeian Agricultural Inspection Service took care of the overall control and supervision of the organic production at farm level http://landbrukstilsynet.mattilsynet.no/dokument_eng.cfm?m_id=201&d_id=1063 , while the Norwegian Food Control Authority http://snt.mattilsynet.no/ took care of the overeall supervision and control of Debio as regards certification and inspection of packaging, processing and import of organic products. The Norwegian Food Safety Authority hosts the database on organic seeds and propagation materials http://landbrukstilsynet.mattilsynet.no/vedlegg/Liste_okol_form_materiale.pdf .

22.3.4 Debio http://www.debio.no/.

Debio is the private, non-profit organization, which is responsible for the certification and inspection of all organic production, processing, marketing and import in Norway - including Demeter products. The Ministry of Agriculture is responsible for the development of the regulation on organic production as regards the production and processing covered by the EU Regulation on organic Farming EEC 2092/91, while Debio has own standards for processing, import and marketing, aquaculture, textile production and input manufacture for organic farming.

Debio is the prime source on statistical information on FSS data for organic farming and it publishes a report every year on its web site (last report for 2003 can be found on http://www.debio.no/section.cfm?id=1&subid=175). These data are also delivered to the Norwegian Agricultural Authority, which uses the data in their annual surveys. For the primary production Debio collects data on the number and types of holdings, areas in conversion, certified organic and not yet converted areas, distribution of various types of plant production on area and county basis, number of animals according to species and type of production on county basis and results of the inspections. For the processing, import and retail levels it collects data on number of enterprices according to branch and county plus the results of the inspections.

Debio also hosts a database on organic producers, processors and organic products which may be used by processors, retailers and consumers wanting to buy various organic products http://www.debio.acos.no/ .

22.3.5 National Institute for Consumer Research (SIFO)

SIFO (http://www.sifo.no/english/) is an independent governmental institute under Ministry of Children and Family Affairs, which conducts consumer research and testing. SIFO's projects are organized into four categories: household economy, consumer culture, environment, market and policy. SIFO does not collect or process statistical data on consumer behavior and buying of organic products on a regular basis but only in connection with specific projects as for example, the EU FP5 project, “Organic Marketing Initiatives and Rural development” (OMIaRD).

22.3.6 Norwegian Agricultural Economics Research Institute (NILF)

NILF (http://www.nilf.no/Engelsk/Hoved.shtml) collects, processes and interprets data on Norwegian agriculture, both at the individual farm and in a more general perspective. Through a number of permanent tasks and through various research projects NILF is one of Norway's main producers of data on economic conditions

within agriculture. The permanent tasks cover among other things, farm accounting statistics in agriculture and forestry, prognoses for the production and consumption of food, statistics for international organizations, pilot farms and experimental economic schemes and developing of methods and material for analysis and planning in agriculture, including the development of computer programs. NILF is responsible for the collection and processing of FADN. Since 2002 the Norwegian FADN has been harmonised with the EU FADN specifications and in 2002 it was basd on 921 farms. Farms with the main part of their production being certified organic by Debio, are ear-marked in the FADN.

22.3.7 Other data sources with relevance on DCPSs

- ACNielsen Norge AS: http://www.acnielsen.no/sitte/contact
- GfK Norge AS: http://www.gfk.no/
- Norwegian Centre for Ecological Agriculture (NORSOEK): http://www.norsok.no/indexe.htm
- OIKOS Oekologisk Landslag: http://www.oikos.no/

22.4 Results of the second stage inquiry

The organisations having returned a filled in Q1 were contacted by phone in January 2004 concerning filling in of the detailed Q2. This personal approach was chosen based on the experiences with Denmark, Finland and Iceland. In these countries personal letters were sent out by e-mail to the relevant contact persons having returned filled in Q1s, but none of the organisations approached had returned any filled in Q2s by mid January 2004. Due to various reasons, i.e. merging of the Norwegian Agricultural Inspection Service and the Norwegian Food Control Authority into the Norwegian Food Safety authority from January 1st 2004, maternity and paternity leave of relevant staff, staff change and heavy work loads, none of the 4 institutions contacted could find time to fill in the 2nd stage questionnaires for collection of detailed information on DCPS in January 2004, so no filled in Q2s were received.

22.5 Conclusion

The data collection and processing on farm level is well covered for organic farming in Norway as concerns Farm Structure Survey (FSS) data, which are collected by the private certification and control body, Debio. Debio also hosts a database on all farms, processors, retailers and importers of organic products. It is a very user-friendly database, which can be used by consumers, processors or retailers interested in knowing where to buy particular organic food products.

The Norwegian Agricultural Authority (SLF), which is responsible for the development of organic production in Norway administers the subsidy scheme for organic farming and keeps a database on the various subsidy schemes it is responsible for. SLF is also responsible for the collection of data for bi-annual surveys on production and trade of organic products. Among other things these surveys contain data on the

amount of various organic products produced and sold as organic plus prices on certain organic products compared to similar conventional products.

The Norwegian Food Safety Authority, established in January 2004, hosts the database on organic seed and propagation materials.

The Norwegian Agricultural Economics Research Institute (NILF) is responsible for the collection of Farm Accountancy data (FADN), which since 2002 have been harmonised with the EU FADN specifications, so the data can be compared with the EU countries. Though farms, which produce the main part of their products as Debio certified organic, there are no separate FADN data for organic farming published in the Norwegian FADN.

At the other levels in the chain from primary production to final consumption including international trade very little information on organic products is available on a regular basis.

23 Poland

Country report

POLAND

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23.1 National relevance of organic farming

In Poland there are 2287 organic farms (approx. 1% of total farms), including 1288 certified farms, 496 farms in second year of conversion and 503 farms in the first year of conversion. Land covered by organic farms increased up to 61236,11 ha and corresponded to approx. 0,33% of UAA. 35554,3 ha are certified as organic and the rest is under conversion (14888,3 ha farms in second year of conversion and 10793,5 ha in first year of conversion). (Data on 2003, source: Inspection Service of Agri-Food Product Marketable Quality www.ijhar-s.gov.pl, phone survey)

There is no data on the size of Polish organic market. The supply of organic products is low. Many of the organic farms exist because of the subsidies. Thus, they are not market oriented. As a result the availability of organic raw materials is limited that has also impact on developing large scale processing. There are just 20 certified processors. Most of them are the SME grain processors and pasta producers. Due to low supply and the fact that the farmers are spread across the whole country the costs of distribution and processing are high and the price premia vary between 10-15% farmer level up to more than 100% at the consumer level. The main distribution channels for organic products are direct sales (via farmers market, deliveries to consumers) and specialized shops (approx. 150 all over the country).There were a few initiatives in the late 90 to sale organic products in the mainstream shops - supermarkets but they failed (due to low supply, quality problems and high distribution costs). In 2003 TESCO supermarket chain expressed interest in selling organic vegetables, introducing quality programs for organic products and promoting organic products. The conventional multiple retailers seem to play increasingly important role in Polish organic food market development.

The wholesalers of so called “healthy products” carry a limited assortment of organic processed products. The wholesale is constrained by restricted supply of organic products so most of the fresh products are delivered to retailers directly by the farmers. Poland could not be considered as country with export orientation since Poland was not at the EU 3rd countries list. There were a few large farms and processors that were certified by foreign operators as well as extensively managed orchards but the real size of export has never been estimated. Thus, there is no information on the organic production in Poland because the farms certified by foreign bodies were not included in any databases. There is currently one export company Symbio Ltd. that specializes in organic products but they export mainly the raw materials (soft fruit, vegetables to EU countries and the USA). The import hardly exist – there were no official permission issued in 2003. However, there are some imported organic products available but they are not recognized as organic. There is no data on export/import of organic products.

23.2 Structure of national statistic / data providers in agriculture

The introductory questionnaires were sent to all 9 institutions including all certifying units (6), NGOs and market research agencies. The respons was very low - none of the certifying units was willing to contribute to EISfOM. since they provide data on organic farming to the supervision body – Main Inspectorate of Agricultural and Food Quality Inspection. The Inspectorate was the only institution that expressed interest

and filled in the introductory questionnaire. After distributing the questionnaires to EUROSTAT partners there was also additional introductory questionnaire sent by Central Statistical Office that is the main data provider in Poland.

23.3 Information about the surveyed institutions

Central Statistical Office, Agriculture and Environment Statistics Division is a governmental organization, financed by taxes. Public administration, primary and secondary statistical data collection are the main purpose of its activity. In the field of statistics its actions are focused on all its aspects - data collection, processing, analysis, archiving and dissemination.

23.3 Institution which run "Organic" DCPS

Main Inspectorate of the Agricultural and Food Quality Inspection, Organic Farming Unit is a governmental organization, financed by taxes. Public administration, supervision of organic farming certification system and secondary statistical data collection are the main purpose of its activity. In the field of statistics its actions are focused on data collection, processing and archiving. Organic farming data is reported once a year based on the information provided by certifying units. The Inspectorate is responsible for data collection according the requirements of 2092/91 regulation.

23.4 Results of the second stage inquiry

The second questionnaires were sent to the two institutions – Main Inspectorate of the Agricultural and Food Quality Inspection and various departments of Central Statistical Office. As a result there were 9 questionnaires sent back that refer to all the levels of data collection.

23.4.1 Farm Level

Agricultural and Food Quality Inspection, Organic Farming Department

The DCPS develops a database for the need of 2092/91 reg. Only organic data is collected on farm structure. Segmentation by region is possible. Data is collected from certification bodies once a year and covers 100% organic farms. Quality management system comprises only visual check by experts. The harmonization to other DCPS's still needs to be developed. Information is disseminated by Internet and reports – free of charge, some data is confidential. There are plans for implementation of new database.

This database could be considered as a good example database that respond to the requirements imposed by the EU integration and includes the specific features of

organic sector in one of the accession countries. The details of the database could be provided in the end of August 2004. The database will be operational from September 2004.

Central Statistical Office

a) Supply Balance Sheet (SBS)

Central Statistical office collects only total data. Supply Balance Sheet do not allow to distinguish organic data. There is no comparison between organic data and total data. Data covers farm structure data and physical quantities, segmentation by product group is possible and data is collected monthly in case of enterprises which employee 50 people and more and yearly in case of enterprises which employee 10 people and more. Data used at SBS comes from other different surveys (secondary statistical data). Computerised plausibility check, visual check by experts and triangulation (i.e. comparison of different data sources) are examples of quality management system. Data is disseminated by newsletters, statistical yearbook and other statistical publications. Some data is confidential but most of the data is available free of charge or user – pay. SBS is harmonised to Eurostat's requirements.

b) Farm Price Statistics (FPS)

Farm Price Statistics do not allow distinguishing organic data from collected total data. There is no comparison between organic data and total data. Data can be segmented according to region (voivodships) and form of ownership. FPS use data from secondary statistical data – there are procurement prices, which are calculated of quotation of value and quantity of agricultural products sold by farmers. Data is disseminated by newsletters, internet/homepage, statistical yearbook, agriculture yearbook and statistical publications. Some data is confidential but most of the data is available free of charge or user – pay. Data about basic agricultural products (i.e. cereals, livestock) are collected monthly; data in wider scope of products including for example fruits and vegetables are collected in biannual and annual questionnaires.

c) Farm Structure Survey (FSS)

There are plans to carry out FSS from 2005 (every to years). Questionnaire will include questions concerning organic farms (FSS –section C/5). Central Statistical Office and Agricultural and Food Quality Inspection just start to co-operate on harmonization of the feature FSS and Organic Farming Register data. There are plans to include all Polish organic farms into FSS (in 2005). The segmentation criteria are not finalized. Computerised plausibility check, visual check by experts and triangulation (i.e. comparison of different data sources are examples of quality management system. Data will be disseminated by newsletters, internet/ homepage and other ways like statistical yearbook, agriculture yearbook, statistical publications. Some data is confidential but most of the data is available free of charge or user – pay.

d) Production Statistics

Production Statistics covers only total data on farm structure data, physical quantities. The DSPC does not allow distinguishing organic data from and comparing

with total data. Data can be segmented according to region (voivodships), product groups and form of ownership.

Production Statistics – representative sample approaches are used and the research covers about 3% of all Polish farms. In case of animal production representative approaches relate to certain product groups with certain types of farms, i.e. three times a year is conducted survey on pig production and twice a year bovine animals and other animals are recorded. Each time it is the same sample. For crop production statistics representative approaches relate to certain product groups with certain types of farms, i.e. “orchard survey” in horticulture is based on representative sample and then generalised on all area of farms, which have orchards. Cereals survey is also based on representative sample but it is generalised on whole area under cereals. Computerised plausibility check, visual check by experts and triangulation (i.e. comparison of different data sources) are examples of quality management system. There is no specific TQM system. Data is collected monthly but some surveys are carried twice a year (survey on bovine animals and other animals) and three times a year (survey on pig production). In case of crop production data is collected monthly but in some cases once a year, i.e. Questionnaire R-CzSR – land use, crops and livestock (it is a survey combined with animal production). Data is disseminated by newsletters, internet/ homepage, statistical yearbook, agriculture yearbook and statistical publications. Some data is confidential but most of the data is available free of charge or user – pay. Weak points of production statistic are too small samples as well as survey cost.

e) Farm Accountancy Data Network (FADN)

Polish FADN is going to act from May 1, 2004 when Poland will join the EU community. From that day data will be collect in that system. FADN comprises only total data. There is no comparison between organic data and total data. FADN do not allow distinguishing organic data. Computerised plausibility check, visual check by experts and triangulation (i.e. comparison of different data sources are examples of quality management system. Data is disseminated by newsletters, internet/ homepage and other ways like statistical yearbook, agriculture yearbook, and statistical publications. Some data is confidential but most of the data is available free of charge or user – pay.

23.4.2 Import / Export Level

Central Statistical Office: Single Administration Document

Single Administration Document form (SAD) covers imports and exports data on intra EU trade and on third country trade. Data is segmented by product, product group, country of origin and country of destination. Data is collected at ports and borders and covers 100% volumes of import and export. It is representative for all relevant products. The DCPS collects only total data with no distinction of organic sector data. There is no separation of organic and conventional products in food and agriculture sections, because there are no such requirements in the CN nomenclature. If organic products would have codes then INTRASTAT would have been good instrument to collect data about import and export.

Computerised plausibility check, visual check by experts and triangulation (i.e. comparison of different data sources) are examples of quality management system. Until May 1, 2004 data is registered into the SI SAD system as a type of CIF in import and FOB in export after the commodity passes the Polish boarder point. INTRASTAT system will start on May 1, 2004 and data on trade between EU will be collected in this system. Foreign trade is elaborated by the DCPS solely on the basis of SAD, which is confirmed by customs offices after the crossing of the commodity over the nation's frontier. Data is collected monthly.

Some data is confidential but most of the data is available, free of charge and some user – pay. They are disseminated in many ways: by reports, by newsletters, by internet/ homepage, by Yearbook of foreign trade statistics and other statistical publications. There is no superior DCPS, however after Poland becomes the member of the EU community data will be collected both from SAD and INTRASTAT system. This new system of foreign trade statistics is going to be named CELINA and will start to work on May 1st 2004.

23.4.3 Consumer Level

Central Statistical Office

Household Budget Survey covers consumer expenditures and consumption volume (in physical quantities). Segmentation according to socio – demographic criteria, spatial criteria and products is possible. Only total data is collected monthly with no distinction to organic data.

Representative sample of the population, which covers 0,3%. It is representative for almost all relevant products (excluding baby foods) and for all consumers. The DCPS use household panels and household diary. Household Budget Survey conducted by the DCPS is independent survey however its methodology is harmonised to Eurostat's requirements. Computerised plausibility check and visual check by experts are used as quality management system. Data is disseminated by reports, newsletters, internet/homepage. The most relevant publications are: HBS (in year), Living conditions (in year). All data is available free of charge or user – pay. There

are plans for introduction of changes in the survey methodology according to the new Eurostat's recommendation in 2005.

Strength points of HBS are:

- international comparability of HBS results due to accordance with Eurostat's recommendation, e.g. COICOP/ HBS classification is used,
- big sample size (about 32400 households is surveyed yearly),
- continuous survey: data collected every month, survey conducted since 1957 in general.

Weak points of HBS are:

- expenditures for chocolate and sweets, alcoholic beverages, wine and beer as well for consumption in restaurants are underestimated.

23.4.4 Wholesaler / Processor Level

Central Statistical Office

Questionnaire concerning retail sale, wholesale sale and network of trade outlets (H-01s) and (SP-3):

- data on whole sale market is collected. in wholesale sale (H-01s) data is collected at large wholesale markets level and medium
- in wholesale sale (SP-3) data is collected at small wholesale markets level.

Segmentation includes only NUTS. In both DCPS in scope of wholesalers/ processors level collects only total data with no distinction of organic sector data. The wholesale survey covers whole population in the frame of H-01s and representative sample of the population for SP-3 survey (about 5% of enterprises which the number of employees is less than 10 people). The survey methodology does not describe the share of wholesale sale of goods, only the group of data (results from NACE classification) are specified. The survey concerns the wholesale enterprises which conducting sale of the certain product groups. Only two groups are selected in survey – food and non-alcoholic beverages, and alcoholic beverages. Computerised plausibility check, visual check by experts and triangulation (i.e. comparison of different data sources) are examples of quality management system. Data is collected once per year. Data is disseminated by Statistical Yearbook. Some data is confidential but most of them are available free of charge and user – pay. DCPS is not harmonised to the other superior DCPS.

Main opportunity is international integrated system of information. Barriers are: survey cost, lack of methodology and co–operation with enterprises. There is little demand or no demand from users for separate organic data. This DCPS can not be used for integrate organic data in common DCPS.

23.4.5 Retailer Level

Central Statistical Office

Questionnaire concerning retail sale, wholesale sale and network of trade outlets (H-01s) and (SP-3) (it is questionnaire concerning economic activity of enterprises, which employee less than 10 people). Data on retailer sale is collected once per year by retailer questionnaire and includes:

a) in retail sale (H-01s) at large wholesale markets level and medium,
b) in retail sale (SP-3) at small wholesale markets level.

The segmentation includes only NUTS. DCPS covers only total data with no distinction on organic product data. The survey methodology is based on the structures of retail sale of mainly groups of goods, as well as according to approach that statistical unit is the enterprise (which is classified according to NACE classification). All big retail chains are covered by the DCPS. SP-3 covers about 5% of enterprises which number of employees are less than 10 people. Quality management system exists in following forms: computerized plausibility check, visual check by experts, triangulation (i.e., comparison of different data sources). Data is disseminated in Statistical Yearbook. Some data is confidential but most of the data is available user – pay. DCPS is not harmonised to the other superior DCPS. Main opportunity is seen in integrated national system of information. Barriers are survey cost, lack of methodology and co–operation with enterprises. There is little demand or no demand from users for separate organic data.

23.5 Conclusions

The availability of data on organic sector in Poland is rather poor. Most of the organic data is owned by the certifying units that are not willing to compile and share data. In 2001 the state regulation on organic farming was developed and Agricultural and Food Quality Inspection (IJHARS) was appointed as supervision body in organic farming. This governmental institution collects data from certifying units. In 2004 they will finalize the development of a new database for organic sector tailor made to the requirements of 2092/91 and national statistic. The database is under construction and the final set of variables should be ready in April 2004. It is hard to reflect on the data quality because there was no control of the quality of data reported by the certifying units up to 2004. Organic data collection in statistical research does not exist but the FSS that is currently being harmonized to EU requirements will include all organic farms in 2005.

24 Portugal

Country Report

PORTUGAL

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24.1 National relevance of organic farming

Organic farming in Portugal has increased during the last few years. From only 73 producers in 1993, it rapidly grew to 564 in 1998 and to 750 in 1999. In 2002 there were 1.059 farms that represent 0,25% of the total number of farms and 85.912 hectares (2,2% of the total area). In some cases, such as the olive groves of the northern and central areas, traditional farming approximates organic farming methods, which is the easiest conversion. With horticulture or orchards, the change has not been so easy, and therefore there are not as many farmers converting.The supply is still less than the demand, reflecting the fact that organic farming is still at an initial stage.

Compared to other countries in northern Europe, interest in organic farming has developed quite recently in Portugal. One of the challenges facing organic farming in Portugal is marketing, since the sector is not yet organised enough to bring the producers in contact with the demand, although this has been achieved in other countries. Most of the processed organic products consumed are imported.

24.2 Structure of national statistical /data providers in agriculture

A first introductiory questionnaire was sent to six institutions, see in following table, but only one of these answered (AGROBIO-Associaocao portuguesa de agricoltura biologica).

Table 24-1: Responses on the first questionnaire survey

Name of Organizations	Type of organization	Responded
Biocoop - Produtos de Agricultura Biológica crl.	private	no
AGROBIO-Associaocao portuguesa de agricoltura biologica	Non-governmental (public funded,)	yes
SOCERT	private	no
UNIVERSIDADE CATÓLICA DO PORTO, Centro Regional do Porto	Semi-governmental	no
Urze - Distribuicao de Produtos de Agricultura Biologica, lda	private	no
Ministerio da Agricultura, Desenvolvimento rurale e das Pescas, Direccao Geral do Desenvolvimento Rural	governmental	no

24.3 Information about the surveyed institutions

24.3.1 AGROBIO-Associaocao portuguesa de agricoltura biologica

It is a non-governmental institution financed by voluntary subscriptions, user-paid services and by member fees. Its main functions are research, education and it is a specialist interest group. Data collection is not a major task: organic production and market data work is organized in a separate department. Data collection regards crop and livestock products, Alcholic beverages and processed products at farm level. Distribution of data is done through paper newsletters and website. Reports contain statistical tables and graphs and are available to the public and are free of charge.

24.4 Institutions which run 'Organic" DCPS

AGROBIO-Associaocao portuguesa de agricoltura biologica runs organic DCPS.

24.5 Results of the second stage inquiry

The detailed second questionnaire was sent to all six institutions, but like the first questionnaire only one of these answered. (Agrobio). This institution completed only the farm level part of the questionnaire.

Farm Level: Agrobio

DG for rural development data system PORTUGAL. The statistical data collected regards farm structure, output and input prices and physical quantity: the segmentation criteria are the different farm types and different crops for total farms and number of farms and acreage for the type of organic crop. DCPS covers both organic and total data.

The method of data collection is a sample panel for total farms and estimation by experts for organic products, these data are representative because they are from government statistics but do not allow any comparison. Data are collected every 5 years in total and every year the DGA has new records of all certified organic farmers provided by certification enterprises. Data are distributed trough reports and Internet/homepage.

Strength: Data covers all organic farmers and related areas.
Weakness: Lacks significant data such as production per type of crop, quantity; sales etc. There is a very little information on marketing. They are trying to find a method to get statistically significant methods that can obtain data about production according to crop, quantity; sales etc.

24.6 Conclusion

The Ministry of Agriculture did not answer our questionnaire, but data collected are available on the Ministry website. They are detailed but they are only about production. In view of the size of the country and the integration of farmers it would be easy to build a national DCPS for organic agriculture.

25 Romania

Country Report:

ROMANIA

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25.1 National relevance of organic farming

The general situation of agriculture can be characterised by a splitting into intensive, more industrial farming companies, established out of former state property, and, as for the majority an “unintentionally” small-scale organic farming community, which out of the mouldy economic situation cannot effort to buy any chemical inputs. In rural areas in Romania in 2001 about 40 % of the population were working in the agricultural sector, mainly for self supply.

Regarding the development of organic farming first data available are from 1999. where 100 organic farmers managed about 1000 ha of land (Quelle: http://www.organic-europe.net/) . New data from 2003 estimate about 18960 ha (0,2 % of the total area) and 1200 farmers in Romania to be organic (http://earthtrends.wri.org/). As for the legislative harmonisation with EU regulation 2092/1992 and 1804/99 in the year 2000 the first national ordinance (34/17.04.2000) on organic farming was enacted by the government. For its implementation the establishment of a “National authority for organic products” under the leading of the Ministry of Agriculture is foreseen, but until now, legislation and necessary structures (national certification body, advisory system etc.) are still under construction.

Currently most of the organic farms in Romania are some kind of business companies or associations, mainly producing wheat, oats, barley, soybeans, as well as milk and milk products for export. Products are certified by foreign certification bodies like SKAL (NL), BIOKONTROL (HU); INAC (DE) and exported to the Netherlands and Switzerland. Until now there is no domestic market for certified organic products.

Table 25-1: Organic farming in Romania (2003)

Number of organic farms	1200
Organic area in ha	18.960 ha

25.2 Structure of national statistic/data providers in agriculture

Table 25-2: Structure of surveyed institutions in Romania

Type of Organisation						
	Governmental	Semi-Governmental	Non-Governmental	Private (non profit)	Privat (Profit)	*TOTAL*
Contacted	2	4	2	1		9
Responded	2	3	2	1		8
Overall response rate						88 %

Field of Activity							
	Market research	Primary statistical DC	Secondary statistical DC	Public administration	Certification	Research	Specialist interest group
Responded (multiple entry possible)	1	2	1	1	1	5	7

25.3 Information on surveyed institutions

25.3.1 National Institute of Statistics

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70525 Bucharest
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The National Institute of Statistics is a governmental organisation which is financed by public funds as well as compulsory duties. The main task of the organisation is to primary and secondary statistical data collection and analyis. Dissemination of results is done via yearly statistical reports, newsletters and, for a smaller part, via the own website http://www.insse.ro/. Concerning agricultural statistics the institution is mainly involved on farm level, collecting data for crop products and livestock products (meat/animals, milk, eggs). Although a harmonised legislation incorporating EU requirements for organic agriculture was already enacted in 2000, until now there is no system developed to include data on organic farming in already established DCPS (e.g. FSS, production statistics, price statistics, supply balance sheets). But it is planned to include variables on structure/size of organic farms in the next FSS starting in 2005.

25.3.2 Ministry of Agriculture, Forestry, Environment and Water management

Contact details:
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General Directorate of Implementation and Regulation
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Although the Ministry of Agriculture is directly involved in primary statistical data collection it acts as a coordinator to pool different data sources. As for statistics on organic farming at the moment there seem to be no plans for integration in already existing DCPS.

25.3.3 Institute of Agricultural Research-Fundulea

Contact details:
Ion Toncea
Departement of Ecological Agriculture

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8264 Fundulea/Calarasi
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The Institute of Agricultural Research is a semi-governmental organisation with a focus on agricultural research. The Department of Ecological Agriculture in cooperation with the Ministry of Agriculture and the National Federation of Ecological Agriculture (an organic producer association) is involved in the collection of data concerning organic agriculture for Bulgaria. Although not harmonised to an international DCPS the database gives indications on the number, structure, husbanded area and number of animals of organic farms in Bulgaria.

25.3.4 Bioterra

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Bioterra is a privat, non-profit organisation of organic farmers in the region of Transylvania. In cooperation with the Minstry of Agriculture the organisation is mainly collecting data on farm level for its own purpose. Dissemination of data is done by yearly paper reports.

25.4 Institutions which run "Organic" DCPS

- National Federation of Ecological Agriculture (there was no information available, which range of data regarding organic farming is covered by the institution, so it could not be included in the analysis)
- Bioterra (there was no information available, which range of data regarding organic farming is covered by the institution, so it could not be included in the analysis)
- Institute of Agricultural Research Fundulea

25.5 Results of the second stage inquiry

Table 25-3: Number of surveyed institutions/respond rate/respond structure Romania

Number of contacted institutions	Number of Responses	Response rate	Respond structure

8	2	25 %	Institute of Agricultural Research Fundulea Vegetable Research BACAU

Table 25-4: Overview about existing DCPS by actor level

DCPS	Institution	Actor level	Total	Organic
FSS (like FSS)	Institute of Agricultural Research	Farm Level		X
FSS (like FSS)	Bioterra	Farm level		X
FSS	National Statistical Institute	Farm level	X	(X) in 2005
Production Statistics	National Statistical Institute	Farm level	X	
Price Statistics	National Statistical Institute	Farm level	X	
Supply Balance Sheet	National Statistical Institute	Farm level	X	

25.6 Detailed information about DCPS, which include organic data collection

25.6.1 Farm Level

Institute of Agricultural Research –Development Fundulea

In 2002 the Institute has developed a separate DCPS for organic farms in Romania similar the to a farms structure survey. Out of research demand reasons a classification of organic farms according to farm type/size and product groups was introduced. In cooperation with the National Federation of Ecological Agriculture the data for the DCPS are made available. The viability of the DCPS seems to be not very high, because as method for data collection estimations of researches involved in this topic is mentioned.

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Specific name of the DCPS: FADN (but in real it's just a FSS)
- Statistical scope: farm structure data
- Segmentation criteria:
  - product group: cereals (for grain), protein crops for grain, oilseeds, potatoes, sugar beets, industrial crops, fodder crops and brassicas, fresh vegetables, melons, and strawberries, pastures and meadows, fruit and berry, grapes for wine production, bovine animals, sheep, goats, pigs, poultry, bees
  - farm type/size or region
  - a segmentation according to region is *not* possible.

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS does only cover organic sector data. Included are mainly the structure of farms (number, hectares and animals).

Does the DCPS promise relative valid and reliable results?

- The collection of data is done in close cooperation with the National federation of Ecological agriculture. Besides as method for data collection estimation of researches is mentioned, which gives no indications on the quality of data gathered.
- According to the information given in the questionnaire about 90 % of the organic cultivated area and 95 % of all farmers are covered by the DCPS.
- The DCPS does not allow a direct comparison between organic and total data, because it is not based on a representative approach.
- As for data quality management triangulation, which means the comparison to other different data sources is used.

How are the results disseminated?

- The results of the DCPS are freely available as a report.

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is not harmonized to other superior or international DCPS, because until now, there are no data requested for this purpose. The initial reason for the establishment of the DCPS was seen in research demand.

What was mentioned for the DCPS as main opportunities and barriers as well as strength or weak points? Are there plans existing to improve the quantity, availability, comparability (harmonisation) or quality of organic data? When yes, which plans does exist?

- Strengths: Data correctness (which can be not confirmed by the used methodology of expert estimations)
- Weaknesses: Scarcity of data, estimation by non experts

As for future plans to improve the DCPS the increasing of segmentation criteria within the DCPS as well as the harmonisation of the DCPS to an International System is foreseen.

Can this DCPS be taken into account as a positive reference (case study) for organic data collection at general?

In this case, the DCPS seems not to deliver really valid and reliable data (estimations), so the DCPS can not be used as an case study example.

25.7 Conclusion

In general the availability of data concering organic agriculture is not sufficient. With some exceptions in the field of farm structure data, which also do not seem to be very reliable, there are no data available for all other relevant market sectors.

Although legislation on organic farming was already enacted in 2000 until now from the official statistical side (National Institute for Statistics, Ministry of Agriculture) there seem to no attempts for improving the lack of data. The only positive aspect which could be found out during the investigation was that in preparation for

accession to the EU in 2007 data on organic farms will be included in the FSS in 2005.

26 Slovakia

Country Report:

SLOVAKIA

Prepared by:

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26.1 National relevance of organic farming

Though being singed by agricultural production, Slovakia depends on imports from foreign countries to cover the purchase of food.

Since the early 90th the organic area has been increased steadyly up to 54.479 ha, which is 2,23 % of the total agricultural used area in 2003. The number of organic farms has increased from 37 to 88 (from 1991 to 2003). The farms size counts about 619 ha on the average. According to estimations 25 % of these farms switched complete to organic production.

37.417 ha (68,7 %) of the 54.479 ha organically cultivated area are grassland, while 16.707 ha (30,7 %) are arable. 355 ha are used for fruit and vegetable production (0,6 %).
(Source:, Juliana Schlosserova, UKSUP retrived 18.03.2004),

Nearly 60 % of the agricultural area is arable and 100 ha is cultivated by a manpower of 6,4 averagely. The tendency of agricultural employment is declining.
(Source: Reuter, Katharina 2002: Entwicklung und Stand des Ökologischen Landbaus in der Slowakei unter besonderer Berücksichtigung der Vermarktung ökologisch erzeugter Produkte, Studie, Humbold Universität Berlin, www.agrar.hu-berlin.de/wisola/ fg/ama/Studie%20Slowakei.pdf, retrived 03.02.2004)

The agricultural share of the total GDP (20,5 Billion US$) was 4,5 % in 2001. The average annual growth altered in the period from 1998 to 2001 from +4,0 (in the period from 1982 to 1992) to –5.0 percent (in 2001).
(*source: http:// worldbankgroups, www.worldbank.org/data/countrydata/aag/svk_aag.pdf)*
Retrieved: 04.03.04)

Table 26-1: Organic farming in Slovakia

Number of organic farms	88
Organic area in ha	54.479 ha

Other figures:
By the end of the year 2002 the total organic agricultural land counted 49.999 ha which is 2.2 % of the total agricultural land. Only 84 farmers which are 1.1% of all farmers do produce organically. *(Source: organic_Europe-net, Statistic 2003 **http://www.organic-europe.net/europe_eu/statistics.asp**)*

Table 26-2: Data and responsible institutions for organic farming

Data available	Institutions responsible	Notes (legal basis, etc.)
Organic plant and animal farms (numbers – annual since 1991)	Central Control & Testing Institute in Agriculture, Bratislava, Dept. of Environmental Protection & Organic Farming	(Act No. 224/1998 Coll. On organic farming and biofood production amended by Act No. 415/2002 Coll.) harmonized in process with EU legislation 2092/91
Number (heads) of animals (number annual since 2001)		
Processors of organic products (numbers annual since 1991)		
Organic crop and animal production (products with "organic farming – EU control system" label)		
Organic seed production (numbers – since 2004)		
Trade of organic products not registered in classification	Central Control & Testing Institute in Agriculture, Bratislava, Dept. of Environmental Protection & Organic Farming	
Prices of organic products (at all stages) not registered in classification		
Districution outlets for organic produce (e.g. specialised shops) not registered in classification		
Data related to integrated agriculture (a national definition is required)	Ministry of Agriculture of SR, Dept. of Environmental Protection & Rural Development	

26.2 Structure of national statistic/data providers in agriculture

Table 26-3: Structure of surveyed institutions in Slovenia

Type of Organisation						
	Governmental	Semi-Governmental	Non-Governmental	Private (non profit)	Private (Profit)	TOTAL
Contacted	Unknown	Unknown	Unknown	Unknown	Unknown	unknown
Responded	4				1	5
Overall response rate						

Field of Activity							
	Market research	Primary statistical DC	Secondary statistical DC	Public administration	Certification	Research	Specialist interest group
Responded (multiple entry possible)		5			1		

26.3 Information about the surveyed institutions

26.3.1 Central agricultural control and testing institute

Contact details:
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The Central Agricultural Control and Testing Institute (in Slovak abbrev. UKSUP) of the Republic of Slovakia is financed by public funds, UKSUP is a governmental organisation supervised by the Ministry of Agriculture of the Slovak Republic. In the field of organic farming performing registration and keeping basic database of organic farming: surveying primary statistics of crop and livestock products UKSUP addresses environmental and organic interest groups by paper reports and electronic data which will be available to public*. (Source: questionnaire)*
Being responsible for the registration of organic farms, the UKSUP (Central Agricultural Control and Testing Institute) cooperates with the operators. It is the central control body of organic farming, which authorises inspection bodies and performs superinspection along with other duties of competent authority for organic farming.
UKSUP is no more responsible for certification, but takes an active part in the conceptual development of regulations and laws on organic farming in Slovak Republic. Furthermore UKSUP lists the fertilizers and pesticides permitted into organic farming system.
(source: , Juliana Schlosserova, UKSUP retrieved 18.03.2004, Reuter, Katharina 2002: Entwicklung und Stand des Ökologischen Landbaus in der Slowakei unter besonderer Berücksichtigung der Vermarktung ökologisch erzeugter Produkte, Studie, Humbold Universität Berlin, www.agrar.hu-berlin.de/wisola/ fg/ama/Studie%20Slowakei.pdf, retrieved 03.02.2004)

26.3.2 Ministry of Agriculture

Contact details:
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The ministry of agriculture is a governmental organisation which is financed by taxes. Primary statistics of cereals, and livestock products, alcoholic beverages and processed products are surveyed on the processor level. These data are published by paper reports, email news and the internet and they are published free of charge. This organisation cooperates with UKSUP. (*source: questionnaire)*

26.3.3 RADELA s.r.o.

Contact details:
RADELA s.r.o.
Janakova
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82523 Bratislava
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RADELA s.r.o. is a private profit organisation, which collects, checks and storages primary data. The organisation is financed by the users, which are addressed by papers and electronic data about the production and processing of cereals and live stocks, alcoholic beverages and processed products. *(source: questionnaire)*

26.4 Institutions which run "Organic" DCPS

- UKSUP
- Ministry of Agriculture

26.5 Results of the second stage inquiry

Table 26-4: Number of surveyed institutions/respond rate/respond structure Slovakia

Number of contacted institutions	Number of Responses	Response rate	Respond structure
unknown	5	unknown	unknown

Table 26-5: Overview about existing DCPS by actor level

DCPS	Institution	Actor level	Total	Organic
	Statistic Office of the Slovakia Republic	Farm	X	X
	Ministry of Agriculture	Wholesaler / Processor level	X	
	Statistic Office of the Slovak Republic	Wholesaler / Processor level	X	
	Statistic Office of the Slovak Republic	Export / Import	X	
	Central Agricultural Control and Testing Institute (UKSUP)	Database on basic data on organic farming products		X

26.6 Detailed information about DCPS, which include organic data collection

26.1.1 Farm Level

Statistic Office of the Slovakia Republic

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Specific name of the DCPS:?
- Statistical scope: farm structure surveyed data (FSS)
- Segmentation criteria: ?

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS does only cover organic sector data and total sector data, there is no distinction of organic sector data possible

Does the DCPS promise relative valid and reliable results?

- The data collection is based on a representative approach of FSS, representing 100 % of the organic farms. The data quality is checked by a computerised plausibility check.
- There are no information about the collection period.

How are the results disseminated?

- The data are disseminated on the internet homepage and by publications.
-

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is harmonized but a superior DCPS is not mentioned.

26.6.1 Production Level

Agricultural Central Control and Testing Institute (UKSUP)

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Specific name of the DCPS:?
- Statistical scope: the source of data is from organic farming production, not from a survey
- Segmentation criteria: ?

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS does only cover organic sector data.

Does the DCPS promise relative valid and reliable results?

- Based on the organic production survey the data represents the whole of organic production. Data are collected by the names of the (produced) biofood or bioproducts.
- Data are collected yearly.

How are the results disseminated?

- The data are disseminated but there is no information how – by own system.

How is the DCPS harmonised or related to other superior DCPS?

- There is no information about the harmonisation of the DCPS.

26.7 Conclusion

Collecting data of organic production seems to be in official interest. Only few farms produce organically but these are represented completely by the DCPS. Production data are used for production statistics. Further DCPS for the other levels are needed, to reach a transparency of organic market in Slovakia.

27 Slovenia

Country Report:

SLOVENIA

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27.1 National relevance of organic farming

In general the importance of the agricultural sector in Slovenia is much more smaller than in comparable CEEC, the share of the GDP from agricultural production is less than 4 % and still declining. Farms are small-scaled (85 % of the farmland is cultivated by farmers with less than 20 ha) and conditions for farming are relatively disadvantageous (50 % of the total area is forest and 70 % of farmland is classified as less-favoured area). Therefore most of it is grassland with a small proportion of arable land.

As for organic agriculture since the introduction of an adequate legislation and implementation of the first certification program in 1998 it had a rapid development. In 2003 1400 farmers cultivated about 180000 ha (organic and in conversion area) which accounts for nearly 4 % of the total farmland. Most organic farmers combine animal husbandry and plant production. The majority is involved in cattle breeding (meat, milk). Sheep and goat breeding is the second most important activity. Plant production comprises grain and animal fodder, vegetables, orchards and a few vineyards and olive groves.

Nearly all organic farmers are organised in two organic farmers associations (SOFA, Slovenian organic farmers association, and AIJDA, Demeter Slovenia). The rapid development of organic farming was released by the introduction of direct payments to organic farmers in 1999, which since 2001/2002 are also part the Slovenian environmental program. The control and certification system was developed under strong assistance of AUSTRIA BIO GARANTIE, which helped to establish a functioning control system according to the required EU-regulations.

Concerning domestic market conditions the main part of the products is sold unprocessed directly to the consumer (direct marketing, farmers markets). As amounts are quite small, there is no mentionable export of of organic products at the moment. Responsible for that one hand seems to be the low market orientation of the organic farmers themselves as well as on the other hand the lack of professional advisory. *(Source: http://www.organic-europe.net/country_reports/pdf/2000/slovenia.pdf)*

Table 27-1: Organic farming in Slovenia

Number of organic farms	1400
Organic area in ha	180.000 ha

27.2 Structure of national statistic/data providers in agriculture

Table 27-2: Structure of surveyed institutions in Slovenia

Type of Organisation						
	Governmental	Semi-Governmental	Non-Governmental	Private (non profit)	Privat (Profit)	*TOTAL*
Contacted	2	2	1	3	2	10
Responded		1		1	2	4
Overall response rate						40 %

Field of Activity							
	Market research	Primary statistical DC	Secondary statistical DC	Public administration	Certification	Research	Specialist interest group
Responded (multiple entry possible)					1	3	2

27.3 Information about surveyed institutions

27.3.1 Statistical Office of Slovenia

Contact details:
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The Statistical Office of the Republic of Slovenia is the main producer of national statistics and the cohesive force in this field. In addition to linking and harmonising the statistical system, its most important tasks are international co-operation, determination of methodological and classification standards, anticipation of users' needs, collection, processing and dissemination of data and taking care of their confidentiality. Regarding statistics on agriculture the data covered are mainly on the structure of agricultural holdings, agricultural production and fishing, agromonetary statistics as well as the usage of fertilizers and pesticides. Until now data on organic agriculture or organic markets are not available.

27.3.2 AJDA Demeter

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Department Public Relations
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1354 Horju
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Fax: 00 386 1 75 40 751
E-mail: frontier@siol.net

AJDA Demeter is an private producer association of bio-dynamic farmers in Slovenia, which besides others is also responsible for certification. Regarding data collection AIJDA Demeter is hosting data on the accounting of individual farms as well as the structural data (number, hectares, animals). The DCPS is only used on own purpose and covers only organic farmers certified by the organisation.

27.3.3 Institute of Agriculture Maribor

Contact details:
Vinarska 14
2000 Maribor
Tel: +386 2 228-4900
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Since 1998 the Institute of Agriculture Maribor is the main certification body for organic farms in Slovenia (organic and bio-dynamic) and therefore the main data provider regarding data for organic farms on farm level. In cooperation with the Ausrian certification body Austria Bio Garantie an EU-compatible inspection and certification system was developed and implemented. Additional data are provided by the biggest national organic farmers association S.O.F.A. (The Slovenian Organic Farmers' Association).

27.3.4 Institute for Sustainable Development

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www.itr.si

The Institute of Sustainable development is providing basic information on the development of organic production (farm level) and gives an overview on the market development. The reports are published yearly via www.organic-europe.net.

27.4 Institutions which run "Organic" DCPS

- AJDA Demeter
- Institute of Agriculture Maribor

27.5 Results of the second stage inquiry

Table 27-3: Number of surveyed institutions/respond rate/respond structure Slovenia

Number of contacted institutions	Number of Responses	Response rate	Respond structure
10	1	10%	AIJDA Demeter

Table 27-4: Overview about existing DCPS by actor level

DCPS	Institution	Actor level	Total	Organic
FSS (like FSS)	AIJDA Demeter	Farm level		X
Adminstrative Data	Agricultural Institute Maribor	Farm level		X

27.6 Detailed information about DCPS, which include organic data collection

26.1.2 Farm Level

Agricultural Institute of Maribor, Certification body

Since 1998 the Agricultural Institute of Maribor is nationwide responsible for the certification of organic farms in Slovenia. The organisation is the only provider of data on organic farming in Slovenia with the statistical scope of farm structure data.

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Specific name of the DCPS:?
- Statistical scope: farm structure data
- Segmentation criteria: number of farms, farm type/size, organic cultivated area: arable land, grassland, vineyards, orchards numbers of animals: Cattle, pigs, horse, poultry region (14 in total)

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS does only cover organic sector data (resource is administrative data from certification)

Does the DCPS promise relative valid and reliable results?

- The data collection is done in the course of the certification process as a full census. As the organisation is the only certification body in Slovenia, most (95%) of the organic farms are covered (except those certified by foreign organisations).
- Data are collected yearly.

How are the results disseminated?

- There was no information available on how the results are disseminated.

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is not harmonized to other superior DCPS. There were no networking activities mentioned.

AIJDA Demeter, certification body

Which statistical scopes are covered by the DCPS and which segmentation does the data set allow?

- Specific name of the DCPS:?
- Statistical scope: farm structure data
- Segmentation criteria: number of farms, farm type/size

Does the DCPS cover only organic sector data, both organic and total data or only total data (no distinction of organic sector data possible)?

- The DCPS does only cover organic sector data (resource is administrative data from certification)

Does the DCPS promise relative valid and reliable results?

- The data collection is done in the course of the certification process as a full census. As the organisation is the is a very small certification body in Slovenia, only a small part of organic farms are covered (only bio-dynamic).
- Data are collected yearly.

How are the results disseminated?

- There was no information available on how the results are disseminated.

How is the DCPS harmonised or related to other superior DCPS?

- The DCPS is not harmonized to other superior DCPS. There were no networking activities mentioned.

27.7 Conclusion

In general the availability of data concerning orgnanic agriculture seem to be quite difficult. Although organic farming has made a rapid development the last 5 years, there seems to no special interest in providing reliable data from the official side (National Institute of Statistics, Ministry of Agriculture). This perhaps can also be traced back to the fact, that state legislation does not demand such a reporting system, because farmers are paying taxes based on the size of their farm.
Concerning the data quality due to lack of information is was not possible to make any amendments.

28 Spain

Country Report

SPAIN

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28.1 National relevance of organic farming

Organic farming in Spain began at the end of the 1970's, with small farms, and it was basically promoted by young people coming from the cities.

Spanish organic farming has shown a slow but steady growth in the course of it´s development. The introduction of the state legislation on organic farming in 1995, and the CAP support measures for the producer sector were introduced later than in the rest of Europe - in some regions only in 1997. Since a substantial increase in the number of growers and land under organic farming has taken place. After the introduction of the support payments for organic farming in the last five years, a speeding-up was observed.

The number of organic farms has increased twelve-fold between 1994 and 1999, and the number of processing companies more than tripled. In the same period the organically farmed surface rose from 17,208.9 ha to 665,055 hectares (1.66 % of the agricultural land).

At present (2002) there are 16,521 producers (1,5 % of all farms) and 1,203 processing companies. There are 17,751 operators (farmers, processors, importers). 665,055 ha (nearly 2 % of the total cultivated agricultural area) are under organic management. The average size for an organic farm (28 ha) is higher than in conventional farming (18 ha). Market volume of Spanish organic market in 2002 amounted 172,9 Mio. Euro.

Source: http://www.organic-europe.net/country_reports/spain/default.asp, retrieved: 05.04.2003, Victor Gonzálvez Pérez, Sociedad Española de Agricultura Ecologica (SEAE), Partida la peira, s/n Apdo. 107, E - 46450 Benifaió, Valencia Spain Tel: +34-961788060 Fax: +34-961788162, seaeseae@yahoo.es http://www.agroecologia.net), MAPA Ministerio de Agricultura, Pesca y Alimentación , www.mapya.es

In 2001 3,6 % was agricultural share of GDP, which counts totally 581,8 billion US$. The average annual growth of the agricultural share reach from 3,8 % (from 1982 to 1992) to 1,0 % (from 1992 to 2002), an counts in 2001/02 –0,3 %.
Source: Worlbank-group. www.worldbank.org/data/countrydata/aag/esp_aag.pdf -

Alternative numbers: GDP - composition by sector:
agriculture: 3.2%
industry: 33.6%
services: 63.2% (1998 est.)
Source: http://www.nationmaster.com/encyclopedia/Economy-of-Spain

Table 28-1: Organic farming in Spain

Number of organic farms	16.521
Organic area in ha	665.055

28.2 Information about the surveyed institutions

28.3.1 Sociedad Espanola de Agricultura Ecologica

Contact details:

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28.3.2 Universidad Politécnica de Catalana

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28.3 Institutions which run "Organic" DCPS

- MAPA Ministerio de Agricultura, Pesca y Alimentación
- statistics on farm and production level

Ministry of Agriculture MAPA

Each February detailed production and regional data are provided by the Spanish Ministry of Agriculture. Since 2003 MAPA collects also data on consumer/retailer level. For more information / contact persons contact Ana Martinez from EUROSTAT.

Contact details:
Ministry of Agriculture, Food and Fisheries MAPA
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http://www.mapa.es/en/alimentacion/pags/ecologica/introduccion.htm
internet access of basic data:
http://www.mapa.es/en/alimentacion/pags/ecologica/info.htm

28.4 Conclusion

Actually, the only data being published regularly are done by the MAPA (MAPA, 2003), based on data gathered from 17 public or semi-public certifications bodies for organic farming. MAPA is publishing this type of information since 1996.

Spain has 17 different autonomous regions (CCAA)[1], with a lot of agriculture policy competence. The regional authorities has created a public certification system for organic farming, and there is one public or semi-public certification body in each region, except in Andalusia.

This certification bodies are gathering its own data from certification bodies and sending it to the MAPA. There it will be processed and reported for publication. Certification bodies usually are not using any special statistical programme (TRIANA, J. J., 2003).Normally they are summarizes all the general information needed for organic farming control and gives a yearly report to the MAPA. Some certifications bodies (Andalusia, Canarian Island at least) are processing its own data and publishing it by its own.

The official (public) institution responsible for statistical data collection and processing in agro food sector is Ministry for Agriculture, Fisheries and Food (MAPA)[2]. This department is actually gathering and publishing yearly the only existing organic farming data in Spain, from all the 17 Spanish regions (MAPA, 2003). It's focused on the side of production (offer) and structured in the following items:

The kind of data they are dealing with are the followings:

- Total organic farming surface, per regions and Spanish old province (counties), classified in 3 categories: in conversion, first year and organic farmed.
- Total organic surface per crop groups (cereals and legumes, potatoes and vegetables; citrus fruits, fruits, olive grove, vineyard, dry fruits, subtropical plants; aromatic and medicine plants; forest and free collected harvest; prairies and forages; green manure and set aside; seeds and plant breeding areas; others), in the different autonomous regions and provinces of Spain
- Number of total organic farming operators classified in 3 different categories: processors, producers and trade importers, per region and province
- Number and type of husbandry farmers per region and province
- Numbers and types of organic plants, agro food industry processors: oil, wine, vegetables, juices and persevered (canned) foods, aromatic and medicine plants, breed, pasta and derivate products, confiture and others, dry fruits, grains, food prepared meals) per region and per province

[1] Comunidades Autonomas (CCAA)
[2] Address: MAPA. Paseo de Infanta Isabel, 1. E-28071 Madrid (www.mapya.es)

- Numbers and type of animal derivates agro food industry processors (slaughterhouses, meat sausages industries, fresh meat shops, eggs industry, honey industry, others), per CCAA and per province
- Global estimation of the organic market value

The organic farming data are usually published together with another conventional and rural development data in a separate chapter specially for organic farming, but there are no information about inputs used in organic farming, production volumes per crop or yields per crop or farm, prices and volume sold in organic farming sector

The General Technical Secretary of MAPA through the Documentation and Information Department is also publishing in a booklet (in English and Spanish) at the website, statistical data of the conventional agro food and forest sector at national level, regarding the list issues in the following table:

Table 28-2: Statistical data on conventional agriculture and foods (MAPA)

Issue	Period
Number & size of conventional plant producers per crops groups and crops	Yearly
Number, size & conventional animals units per animal species	Yearly
Income per farm type	Yearly
Inputs and machinery used	Yearly
Forest surfaces	Yearly
Land prices	Monthly
Testimony prices of agriculture products	Weekly
Agriculture products price paid and received by the farmers	Monthly
Agriculture surfaces and productions with yields	Yearly
Market price for agro food in origin and destination for retailers and handlers	Weekly
Husbandry units and heads	Yearly
Milk derivate products quantities and prices	Monthly
Fruits and olive trees units and plantations	Five years
Import and export of agro food sector value and quantities	Yearly
Agricultural economic indicators	Yearly
Foods consumption volume (home, restaurants and institutions), per products	Yearly
Foods cost per products (home, restaurants and institutions)	Yearly
Food quality: Origin denomination area, production and marketed, per products	Yearly
Agro food industry: Numbers of industries per sub-sector s	Yearly
Agro food: Value and quantities of productions sold per product	Yearly

Source: Elaborated by the author with data of MAPA (www.mapya.es)

The agro food data and the agriculture data are collected, in cooperation with the CCAA authorities, in a separated way. The methodology used by MAPA, is described on the internet web page. All this data are survey or collected and autonomous community (CCAA) level and province level.

This network could be used also for organic farming products data

The Spanish Society for Organic Farming (SEAE) a national NGO promoting organic farming, with members in all the Spanish community has gathered some information about organic farming statistical data, is interested in this kind of activities and information. This organization has translated into Spanish and circulated (SEAE, 2003) the EISfOM information: the press release, elaborated by Nick Lampkin, the

first letter asking for membership and involvement in EISfOM project and the second cover letter, explaining how to fill the questionnaires.

SEAE has gathered some available and provided information about the statistical system from the MAPA for agriculture and rural development and therefore is answering the proposed EISfOM questionnaires with the purpose to contribute to the aims of this project and to pass recommendations of Projects to the MAPA authorities.

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29 Sweden

Country Report

SWEDEN

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29.1 National relevance of organic farming in Sweden

The Swedish Board of Agriculture is the public authority responsible for the official statistics of Sweden within the agricultural sector. As concerns statistical data on organic farming, the Swedish private certifier and inspection body, KRAV (www.KRAV.se) is the main source for organic farming statistics. KRAV performs all certifying activities in Sweden including certification of Demeter production and products (www.Demeter.nu).

According to the Statistical year book 2003 from the Swedish Board of Agriculture (chapter 11) http://www.sjv.se/net/SJV/Startsida/%c4mnesomr%e5den/Statistik+&+fakta/J%c5/J%c5+2003/Inneh%e5ll_pdf+2003 , the total number of KRAV inspected organic farms was 3536 farms in 2002, of which 703 were still in the conversion phase. The corresponding certified organic area was 188.543 ha, while 36.358 ha were not yet converted. The certified organic area corresponded to about 7 % of the total agricultural area in Sweden in 2002, and it has increased by 14 % compared to 2001. About 39 % of the certified organic area is used for clover grass fields in the rotation, 27 % is used for cereals and about 19 % is used for permanent grass fields and meadows outside the rotation. In table 29-1 is presented an overview of the number and area of organic farms compared to all farms in Sweden.

Table 29-1: Number and area of organic farms in Sweden year 2002

	Organic farms		All farms	
	Total	In % of all farms		
Number of farms	3536	5.0	71.000	
Total production area, ha	224.901	8.4	2.679.941	
Certified organic area, ha	188.543	7.0		
Total production area per farm, ha	63,6		37,8	

Looking at the data from the Swedish support scheme for organic farming, the area of organic farming is considerably higher. In 2002 414.198 ha were under the organic support scheme. However, the plant and animal products from the areas under the organic support scheme, which are not certified by KRAV, are marketed as conventional products.

On request of the Swedish National Board of Agriculture, Statistics Sweden has since 2003 collected separate data for the production and yield of organic cereals and potatoes (personal communication with Gunnel Wahlstedt, Statistics Sweden).

In 2002 the certified organic animal stock comprised 21.683 organic dairy cows, 13.348 suckler cows, 55.156 other cattle, 860 dairy goats and dairy sheep, 15.569 mother sheep, 24762 lambs, 1171 sows, 24806 other pigs, 247.3443 egg laying hens and 31.072 chickens for fattening.

KRAV is authorized by the Swedish National Board of Agriculture (http://www.sjv.se/net/SJV/Home) and the Swedish National Food Administration (http://www.slv.se/engdefault.asp) under the Ministry of Agriculture, Food and Consumer Affairs to carry out inspection of the organic production in Sweden through the whole chain. KRAV keeps a record on all KRAV certified enterprises at http://www.krav.se/katalog/. In 2003 there were 3191 farms, 324 processors, 112 importers, 40 farm input manufacturers, 520 retailers and 232 restaurants. From 2002 to 2003 the number of KRAV certified farms decreased slightly, while the certified organic area increased about 9 %.

The sale of KRAV certified products increases, and in 2002 the value at wholesaler level corresponded to about 212 million EURO, which was an increase of about 10 % compared to the previous year. KRAV keeps a database on KRAV certified organic products at http://www.krav.se/produktlista/

Since 1999 statistic data on slaughtered cattle, sheep and pigs have been collected and published by Ekokött http://www.ekokott.org, a non-governmental interest group for the organic meat producers. The annual survey covers about 95 % of all animals (cattle, sheep and pigs) from KRAV certified animal herds slaughtered in Swedish Abattoirs.

According to the Swedish Dairy Association http://www.svenskmjolk.se/english.asp there were 462 KRAV certified dairy herds delivering about 149.400 t organic milk in 2003 - almost the same as in 2002. This corresponds to about 4.7 % of the total number of dairy producers and 4,7 % of the total milk delivery to the Swedish dairies in 2003 http://www.statistik.svenskmjolk.se/search.asp?id=2&action=showConcepts. Since 1998 the Swedish Dairy Association has also collected consumer prices on organic milk with 1.5 % fat content and consumer prices on various conventional dairy products http://www.statistik.svenskmjolk.se/tabels/konsumentpriser04.pdf

29.2 Structure of national statistics/data providers in agriculture

In the beginning of August 2003 KRAV was contacted as the key institution for collection of information on relevant institutions and contact persons to be involved in the answering of the first stage and second stage questionnaires of the EISfOM project. However, despite numerous e-mails and phone calls KRAV never responded with any information.

Further, it had been agreed with EUROSTAT not to send out any questionnaires to their contacts until they had been informed about the EISfOM project by EUROSTAT. In Sweden 3 of the most important statistical sources (Statistics Sweden, Swedish Board of Agriculture and KRAV were EUROSTAT contacts, which was about half of the institutions identified at that time, being relevant to contact. Therefore no questionnaires were sent out in Sweden until EUROSTAT had informed its contacts about the EISfOM questionnaires in the beginning of November 2003.

No filled in Q1 or Q2 questionnaires were returned. Neither was it possible to find any Swedish representatives for participating in the EISfOM seminar "Development of European information systems for organic markets" held in Berlin, Germany on the 26th and 27th of April 2004. However, Statistics Sweden has helped in the control of

the information for Sweden on Data Collection and Processing Systems (DCPS), which include organic data, and which were presented in overview tables at the seminar in Berlin.

In table 29-2 is given an overview of the most important data collecting and/or processing organizations on agriculture and food in Sweden based on information found at the internet.

Table 29-2: Data collecting and/or processing organizations on agriculture and food in Sweden.

Name:	Type of organization	Level of data collection	Collection of "organic" data separately?
Statistics Sweden http://www.scb.se	Governmental data collection, processing and dissemination	Farm level, Production, FADN Processing, retail, product and price statistics, inter-national trade	Yes, for farm level, FADN and processing but organic data are not published separately
Swedish Board of Agriculture http://www.sjv.se	Governmental authority supervising the private certifier and inspection bodies	Farm level, FSS Processing / input manufacture Trade (import /export)Prices	Yes, organic farms, organic area, organic crop products and, livestock products.
KRAV http://www.krav.se	Private certifier and inspection body	Farm level, processing / input manufacture Wholesale / distribution International trade	Yes, on farm level, and on number of organic processors, wholesalers and retailers and importers
Demeter www.Demeter.nu	Private certifier and inspection body	Farm level, processors	Yes, number of certified members (not publicly available).
Swedish National Food Administration http://www.slv.se/engdefault.asp	Governmental authority supervising the private certifier and inspection bodies	Processing, retail, import	Yes, number of inspected organic processors, retailers and importers
Swedish Institute for Food and Agricultural Economics http://www.sli.lu.se/eng/	Governmental research institute	Whole production sector	Yes, for specific studies, but no data collection on a regular basis
Ekokött http://www.ekokott.org	Private non-profit interest group	Farm level, processing	Yes, KRAV certified slaughtered animals
Swedish Dairy Association http://www.svenskmjolk.se/english.asp	Private non-profit interest group	Farm level, processing	Yes, KRAV certified dairy herds, organic milk delivered and organic milk products produced, milk price
Swedish Consumer Coalition http://www.konsumentsamverkan.se/english/indexeng.html	Private non-profit interest group	Processing Retail Consumer	Yes, consumer prices at retail level but not at a regular basis.

2.2 Short profiles of the main national data collectors and providers

Statistics Sweden http://www.scb.se/default____2154.asp

Statistics Sweden is a central government authority for official statistics and other government statistics being responsible for the coordination and support of the Swedish system for official statistics. Statistics Sweden produces part of the agricultural statistics (see overview: http://www.scb.se/templates/Amnesomrade____8680.asp. Statistics Sweden and Swedish Board of Agriculture publish reports on agricultural statistics, Farm Structure Survey (FSS) data, production of crop and animal products, agricultural economy, Farm Accountancy Data Network (FADN) data, prices and employment etc.

Organic farms are ear marked in the FADN (which are based on 1000 farms), but FADN data for organic farming are not presented separately. Statistics Sweden is also undertaking a project on organic production. The project includes for example comparisons in agricultural household incomes between organic and non-organic farms. In the household budget survey, information about purchases of organic products has been collected, starting 2003.

Swedish Board of Agriculture http://www.sjv.se/net/SJV/Home

Swedish Board of Agriculture is the expert authority in the field of agricultural and food policy, responsible for the agricultural statistics and also the public authority responsible for the control and supervision of the private organic certifier and inspection body, KRAV at farm level. It is responsible for the Plan of Action for Organic Agriculture http://www.sjv.se/download/SJV/Trycksaker/Pdf_rapporter/ra01_11.pdf launched in 2001, which has the aim that the organic crop production shall cover 20 % of the total farm area, and the organic animal production of dairy cows, beef cattle and sheep shall equal 10 % of the total animal production in 2005. Besides, it is responsible for the official statistics of Sweden within the agricultural sector, including the FSS. The FSS data do not include farms with less than 2 ha of land http://www.svenskstatistik.net/eng/ssnjord.htm . The Swedish Board of Agriculture also hosts the database on certified organic seed and propagation materials http://www.sjv.se/download/SJV/%c4mnesomr%e5den/V%e4xt%2C+milj%f6%2C+vatten/Uts%e4de/Ekologiskt+uts%e4de/saluf%f6ring2004.PDF

KRAV http://www.krav.se

KRAV develops organic standards, inspects to these standards and promote the KRAV label. KRAV is organised as an incorporated association with 29 members representing farmers, processors, traders and consumers plus environmental and animal welfare interests. KRAV is the main primary source of information on certified organic agriculture and other statistical information on organic farming http://195.84.168.13:82/. KRAV keeps a database on all KRAV certified enterprises

(farmers, processors, wholesalers, input manufacturers, retailers and importers) http://www.krav.se/katalog/ and a database on KRAV certified products http://www.krav.se/produktlista/.

Swedish National Food Administration http://www.slv.se/engdefault.asp

Swedish National Food Administration is the public authority responsible for the overall supervision and control of KRAV and Demeter Förbundet as regards certification and inspection of packaging, processing and import of organic food products. From 2001 and 3 years ahead it has carried out studies on quality and safety of certain organic food products.

Swedish Institute for Food and Agricultural Economics http://www.sli.lu.se/eng/

The Swedish Institute for Food and Agricultural Economics is a governmental agency with the assigned task of performing economic analyses of agricultural and food policy issues.
It does not collect statistical information on organic farming or food products on a regular basis, but it has produced several policy reports on organic farming and food production on for example, cost benefit analysis of organic food production, and price formation and demand for organic food products http://www.sli.lu.se/eng/publ.asp .

Ekokött http://www.ekokott.org

Ekokött is a non-governmental interest group for the organic meat producers. Since 1999 it has collected statistical information on all KRAV certified cattle, sheep and pigs slaughtered in Swedish abattoirs. The annual survey covers about 95 % of all slaughter animals (cattle, sheep and pigs) from KRAV certified animal herds. The report for 2002 can be found at http://www.ekokott.org.

Swedish Dairy Association http://www.svenskmjolk.se/english.asp

The Swedish Dairy Association is the national industry organisation for Swedish dairy farmers and the Swedish dairy industry. It works on behalf of its owners, who are the seven largest dairy companies (jointly representing more than 99 percent of the Swedish milk production). It collects statistical information on organic and total number of dairy herds, milk delivery to dairies, prodcution of various organic dairy products and consumer prices on some dairy products http://www.statistik.svenskmjolk.se/ .

Swedish Consumer Coalition
http://www.konsumentsamverkan.se/english/indexeng.html

The Swedish Consumer Coalition is a non-profit, non-governmental consumer organization, which is independent from trade and producers. Among other things it carries out consumer campaigns on "Choosing organic food products" and "Safety and quality requirements in the processing of organic food products" (in collaboration with the Swedish Ecological Farmers http://www.ekolantbruk.se/english/). In 2003 and 2004 it has also carried out surveys on consumer prices in super market chains for various organic milk products and organic carrots compared to similar conventional products http://www.konsumentsamverkan.se/11verk/kampanj/ekomat/prismjolk.htm , but these studies are not carried out on a reguar basis.

Other organisations which may collect statistical information on organic food production, trade and consumer expectations:

- ***A.C. Nielsen Sweden*** http://www.acnielsen.se . International market research company
- ***GfK Sverige*** http://www.gfksverige.se/index.htm **.** International market research company

29.3 Conclusion

The data collection and processing on farm level is reasonably well covered for organic farming in Sweden as concerns ceritified organic farming data, which are collected by KRAV and Farm Structure Survey data for all farms collected by the Swedish Board of Agriculture. Statistics Sweden is responsible for the Farm Accountancy Data Network, but no separate statistical data for organic farming are published in the FADN.

At the other levels in the chain from primary production to final consumption of organic food products, very little information on organic products is available on a regular basis.

30 Switzerland

Country Report

SWITZERLAND

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30.1 National relevance of organic farming

107.000 ha are cultivated organically in Switzerland, 10% of the total agricultural area. After Liechtenstein and Austria, Switzerland has the third biggest share of organic agriculture in the world. 6.466 organic farms, 10.8% of all Swiss farms (www.organic-europe.net/europe_eu/statistics-2001.asp, 10/2003) produce mainly milk and dairy products, meat and meat products, eggs, bread cereals, vegetables and potatoes. In 2002 the organic products turnover topped the 1 billion CHF limit (EUR 677 million) and in 2003 the market share of organic products reached 4% of the total market. Retailers are the main sales channel for organic products and sell 75% of all organic products. 16% are sold via organic shops and health food shops, 5% via direct sales and 4% via bakeries and butchers. The future market development is estimated on 5-10%.

Natural factors limit the options for Swiss production and restrict domestic supply. The import share differs in size depending on the product group (see table 30-1).

Table 30-1: Estimated import share of organic products in Switzerland

Product Group	Percentage of import volume
Cereals	91
Oilseeds	99
Potatoes	2
Vegetables	21
Fruit	77
Wine	4
Milk	0
Eggs	0

Source: Omiard unpublished results, 2002

30.2 Structure of national statistic/data provider in agriculture

19 introductory questionnaires has been sent out to 16 institutions and associations collecting and processing data. At two national institutes (State Institute of Statistics, Federal Office of Agriculture) there are several independent departments which run DCPS (Data Collection and Processing System). Therefore the first questionnaire has been sent to the adequate departments at these institutions. 12 contact partners answered the introductory questionnaire. Half of the institutions are governmental (n=4) or semi-governmental (n=2) ones, financed by taxes. The other organisations are non-governmental institutions (n=1) with partly public financiation or private ones with (n=3) or without (n=2) profit orientation.

Nearly all institutions have the main purpose of primary (n=9) or secondary (n=7) statistical data collection. Market research and public administration (n=3), media work (n=2), support of special interest groups, certification and research (n=1) are other main purposes of the organizations. The major focus with respect to statistical data is the data collection and reporting (n=10). But also data storaging (n=8), data checking (n=7) and data analysing (n=6) play a major role. For only two institutions data collection is the main task. For the most institutions it is an important part of the

work (n=6) or it is done in close cooperation with other institutions (n=6). Only for one institution it is no major task.

At nearly all institutions organic data are integrated in the different divisions (n=10). Only Bio Suisse as umbrella association for organic farming collects exclusively data for organic products / farming. Crops and livestock products are the most important product groups data are collected for (see figure 30-1).

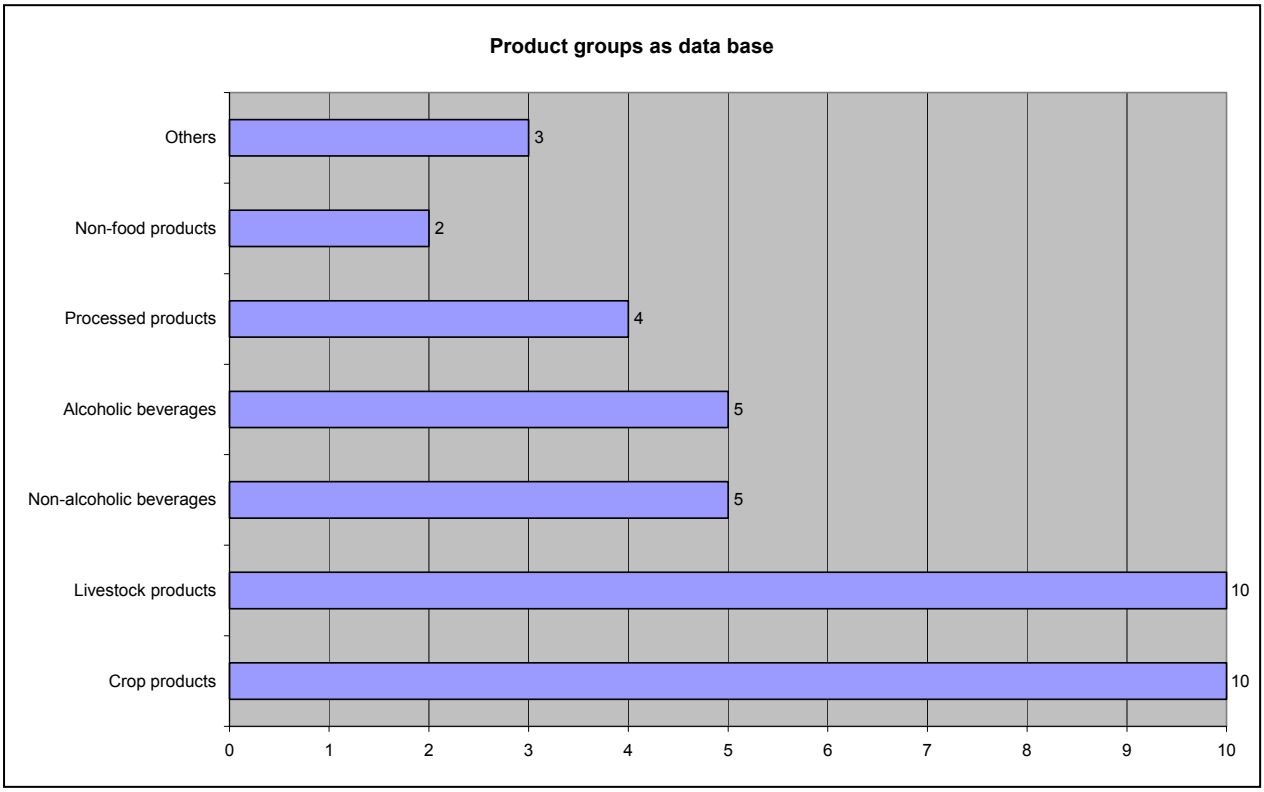

Figure 30-1: Product groups, data are collected for

The most crop product groups were data are collected are vegetables (n=10 organisation), fruits (n=9) and cereals (n=8), the most important livestock product groups are milk (n=10), meat and eggs (n=9). Beside crop and livestock products there are DCPS which collect data on non-alcoholic and alcoholic beverages (n=5), processed prodcuts (n=4), non-food products (n=2) and others (n=3).

The data are mainly collected on farm level and on wholesaler level (n=6). But data are also collected on import/export level (n=5), consumer level (n=4), processing level (n=4) and retailing level (n=3) in Switzerland (see figure 2). No contacted institution named policy-relevant indicators concerning organic farming as scope of data collection. However the Swiss Federal Office of Agriculture collects and publishes the data once a year.

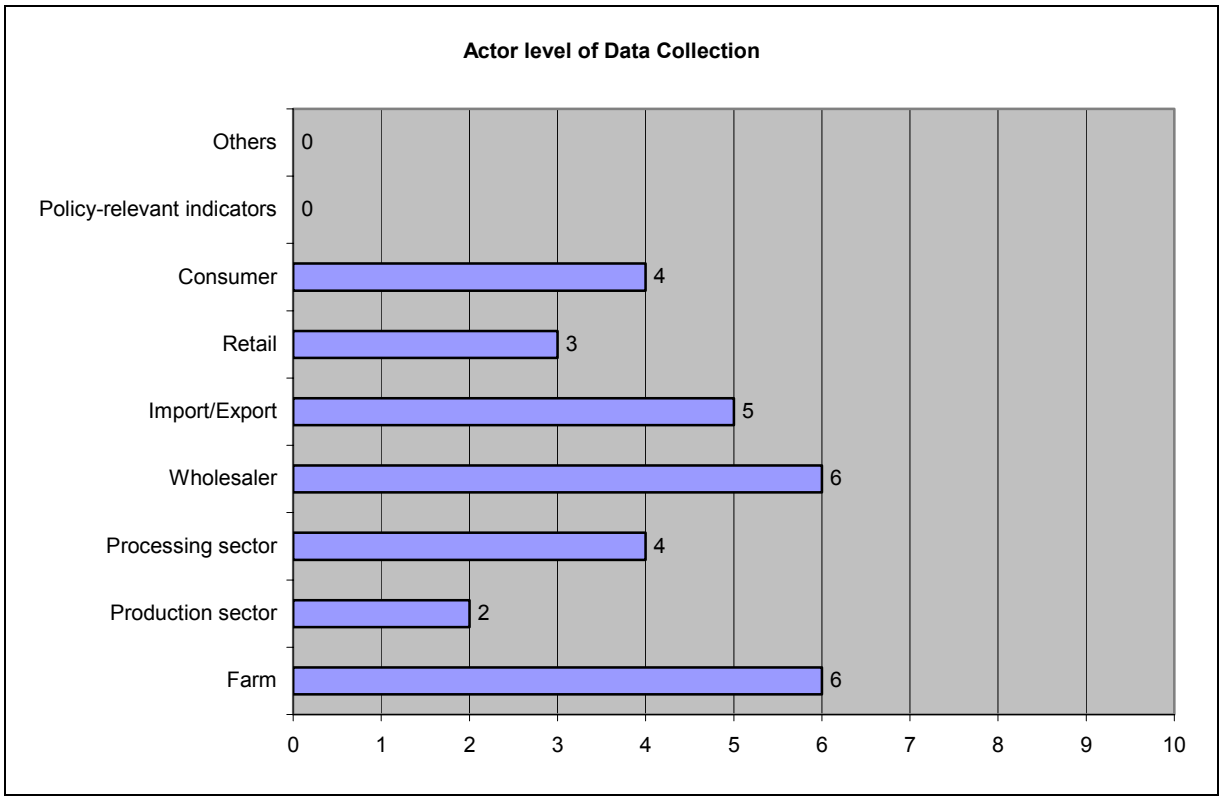

Figure 30-2: Actor level of data collection

The most institutions store the data electronically (n=10), by different electronic files. But a few institutions (n=2) still store the information by paper. Paper reports are the main medium for disseminating the data (n=10), but meanwhile also electronic media play a major role by dissemination on websites and newsletters (n=6). A minority spreads the information also by paper newsletters (n=4) or by other possibilities. The results of data analysing and processing are mainly available for all paying users (n=7) or for free. But there are also institutions, which only provide the information to a closed group (n=4) or to paying clients (n=4). At a few DCPSs the information is not available (n=1) for public users.

30.3 Institutions which run 'Organic" DCPS

In Switzerland there are several institutions which run organic DCPSs. The organic producers association BioSuisse and the certification body bio.inspecta collect only organic data on production, import/export and the retail sector. But also the State Statistics Institute, the IHA-GfK AG, the Swiss Central Office for Vegetables and Special Crops, the Federeal Research Institute for Agriculture and Technics and the Treuhandstelle Milch run organic DCPSs beside total DCPSs.

30.4 Results of the second stage inquiry

The link for answering the second questionnaire on the EISFOM-homepage has been sent to all contact partners, which answered the first questionnaire and in

addition to other important institutions like the IHA-GfK AG, which did not send back the first questionnaire. In total 18 institutions in Switzerland got the second questionnaire, also to spread it in-house to responsible persons in different departments of the companies or institutes. 15 detaillied questionnaires came back, covering data on production (price statistics, production statistics, accountancy, farm structure), consumer level, import and retailer level.

30.5 Information about surveyed institutions

In the following the institutions are described for short according the level, data are collected on.

30.5.1 Farm Level

Treuhandstelle Milch GmbH (TSM): Production Statistic

The Survey on Volumes of Production and Processing collects total and organic data in Switzerland and Liechtenstein about the physical quantities (e.g. animals, crops, milk). The data can be segmented according the main utilization (e.g. dairy), according product groups (milk products) and spacial criteria (cantons). Organic data are integrated within the DCPS and distinguishable from total data, which makes a comparision between organic and total data possible. The method of data collection is a census for statistical purposes and the data are collected monthly or at least once per year. The quality of data is checked by computerized plausibility checks and visual checks by experts. The information about the total products is disseminated by reports and internet/homepage. Organic data is not disseminated, but it is planned to publish annual figures in future. In general, some of the information is available, but the majority is confidential. The DCPS is not harmonized to an international DCPS, because there is no demand of an international system and the organisational effort for harmonization would be too big. Further there are not any national supply networks for this DCPS. The strength of this DCPS is the method of collecting data (census), the weakness is the own declaration of the data suppliers. There are not any plans for a further development of the DCPS. Considering the mentioned disadvantages and the limited importance of this DCPS, it is not suited for a case study.

Treuhandstelle Milch GmbH (TSM): Price Statistic

The prices and production data are collected at one census. In the following, only the specialities of the Price Statistic are mentioned, the most details are similar to the Production Statistic of TSM. The Price Statistic collects and processes prices of farmers (e.g. for animals, crops, milk) both for organic and conventional. The data can be segmented according product groups, but as only milk data are collected, it is no real segmentation. Organic data is included within the total DCPS and can be distinguished. Therefore organic data can be compared with total data. The data is collected by announcements of farmers.

Schweizerische Zentralstelle für Gemüsebau und Spezialkulturen (SZG)

The DCPS of the Swiss central office for vegetables and special crops is called GEMIS 2003 (based on Access) and collects total data about the production (hectares) and both organic and total data about prices (input) and physical quantities of the outputs. The data can be segmented according product groups (only vegetables) and spacial criteria (cantons). Organic data is integrated within the total DCPS and distinguishable from total data since 1999. The method of data collection is a combination of weekly registration for statistical purposes and announcements by producers. 90% of the producers are covered in the DCPS – a representative approach. For the market less important producers, like direct marketing (weekly markets), yard sales and self-supporters are not covered by the DCPS. The used method of data collection allows a direkt comparision between organic products and the total production. Experts control the quality of collected data. All data are available for paying users but a few data are also confidential or available without paying. The data are published by reports and internet/homepage. The most important publications are the Annual Report, the Cut Flowers Brochure and the Production Costs Report IP. The DCPS is not harmonized to an international system because of the organisational effort and because of the nonexistance of an international DCPS for this special area. The strength of the DCPS is the simple, modular structure, but the weakness is the boundedness of crops. The DCPS should be developed regularly, according to the needs of the users.

A separate Production Statistic exist, where 90% of the farms regularly fill out a questionnaire. Organic vegetables are registered separately referring the total production value per country, the total production volume per country, total production volume per region (to NUTS level), production value sold as organic and the production volume sold as organic.

The DCPS is not suited for a case study, because of the limited sample of product groups which are covered. Therefore the national importance of this DCPS is small.

Bundesamt für Statistik (BfS)

The DCPS is called Landwirtschaftliche Betriebsstrukturerhebung / Betriebszählung (Agricultural Production Statistic / Farm Census). Data about the farm structure (number of farms, hectares/animals and labour) are collected. The data can be segmented according the size or the type of the farm (agricultural area), the gross margin, according the product group (nearly every product, except olives, bees, meat, milkproducts, honey) and spacial criteria (both Nuts-level and level of communes). There are both organic data which are integrated in the DCPS and are not distinguishable and organic data which are integrated in the DCPS but distinguishable. The data are collected at least once per year by census by registration and for statistical purposes. As census the DCPS has reliable results. 98% of the area and 98% of the farmers are represented – these are all farmers who get direct payments. A comparision between organic data and the total data is possible within the DCPS. Different quality management systems are used (computerised plausibility check, visual check by experts, triangulation). Data are disseminated by reports, by internet/homepage and according special customer requirements. Some data are confidential, but most data are available. The DCPS is not harmonized to an international DCPS, because Switzerland and the EU do not

have bilateral treaties referring statistics. But there are national supply networks with the agricultural departments in the cantons, which are responsible for direct payment. Several strenghts are mentioned: reliable figures, figures set by law, small effort for calculating the gross margins. The weaknesses are the decentral structure and the high administrative effort. There are no conrete plans about a further development of the DCPS. The DCPS should not be respected as case study.

Bio Suisse: Price Statistic

The price annotation of BioSuisse is a separate DCPS only for organic prices (output, e.g. animals, crops, milk). A segmentation according type and size of the farm (region, producer organisation) and product groups is possible. The data is weekly, monthly or at least once per year collected by sample or panel and price monitoring after own price negotations. The sample represents 95% of the organic area and 95% of the organic farmers and is therefore representative, but only for organic agriculture. A direct comparision between organic products and conventional products is possible, not within this DCPS (as total data are not collected), but with other DCPS. There is no quality management system for the DCPS. All information is disseminated by reports and internet / homepage and freely available. There is no harmonization to an international DCPS, because the organisational effort is too big and there is no demand for. But the prices are forwarded to national price catalogues for agricultural products. National supply networks for organic data exist between LBL (Beratungszentrale Schweizer Landwirtschaft = Advisory Service for Swiss Agriculture). The main strength is the high acceptancy within the organic sector, the weakness is the missing consistence of data collection. In future it is planned to standardise the kind of survey and the frequency and collect data online per internet. As only data on organic products and production are respected, the DCPS is not suitable for a case study.

Bio Suisse: Farm Structure and Production Statistic

The Survey on Structure Data of the Licencees (farmers, wholesalers, processors) of BioSuisse collects only organic data about farm structure (number, hectares, animals) and physical quantities (outputs, e.g. animals, crops, milk). The data is provided by bio.inspecta, the main Swiss inspecition body. The data can be segmented according farm size, farm type and product groups. The data are collected by cesus by registration at least once per year. 95% of the area and 95% of the farmers are a representative sample. But organic farms, which are not licencees of BioSuisse are not covered. A direct comparision between organic data and conventional data is not possible. The quality of data is not checked. Some of the information is published on the internet/homepage and by an annually press conference and available, but most data are confidential. The DCPS is not harmonized to an international DCPS, because of no demand and the big organisational effort, but a national supply network with bio.inspecta (certification body) and the Bundesamt für Statistik (State Statistic Institute) exists. The strength of the DCPS is the reliability of licencees in announcing data, but the weakness is the inconsistent data collection. For the future there are plans for standardising the DCPS. It is not suitable as case study, because only organic data are collected and processed and only the licencees of BioSuisse are covered.

bio.inspecta

This DCPS of bio.inspecta is a survey of farm numbers, agricultural area and animal numbers, only for organic products and production. An integration of organic data into a total DCPS is not relevant, because bio.inspecta is a certification body only for organic products. Data about farm structure (number, hectare, animals) and physical quantities (output) are collected. The data can only be segmented according spacial criteria (cantons, regions with different languages). The method of data collection is a census by registration at least once a year. 92% of the organic area and 92% of all organic producers guarantee a representative approach. But at the moment there is no direct comparision between organic and total data possible. In future this should be changed by agreement with the State Statistics Institute. The data quality is controlled by a computerized plausibility check. The data is not published, most data are not available and confidential. The DCPS is not harmonized to an international system, because there is no similar system. The main strengths, which are mentioned for the DCPS, are the coverage of nearly the whole organic sector in Switzerland, valid data, the central data collection and administration and the possibility of analysing the data according special label programmes. For the future bio.inspecta plans to build up a database which includes more than 90% of all farm structure data as well as volumes of processors and imports. As database of a national certification body for organic products and production, the DCPS is not suited for a case study.

Eidgenös. Forschungsanstalt für Agrarwirtschaft und Landtechnik (FAT)

The DCPS is called Zentrale Auswertung von Buchhaltungsdaten (Central Analysis of Accountancies) and collects data about accounting of individual farms, farm structure (animals, hectares, labour), prices (outputs) and physical quantities (outputs) both for organic and conventional products or farms. The data can be segmented according farm size and farm type, product groups and spacial criteria (production zones, e.g. mountain, valley, hill). Organic data is integrated within the DCPS and distinguishable since 1993. The data are collected at least once a year both by census for statistical purposes, panels and surveys. By representing 95% of the area and 80% of producers the method can be called representative. It allows the direct comparision between organic and conventional. In addition, the quality of data is controlled by computerized plausibility checks and experts. The data is disseminated by reports, newsletters and in the internet. The main publications are the Hauptbericht, Grundlagenbericht, Kostenstellenbericht, Report on organic farms, FAT-Report and the webpage: http://www.sar.admin.ch/fat/d/publi/pubzentra.htmlt. The DCPS can be used as case study, as the data are representative, the quality of data is controlled and both organic and total data are distinguishable.

Schweizer Bauernverband (SBV): Production Statistic

The production statistic of the Swiss farmers` association is harmonized to the international production statistic of Eurostat. The data are surveyed on the level of processors and producers. Organic products are not respected in special and

therefore not distinguishable from total production data. Data are collected referring the total production value per country, the total production volume per country, the production value sold as organic, the production volume sold as organic. The quality of data is controlled by triangulation. The data is disseminated by reports, the most important one is called Statistische Erhebungen und Schätzungen (Statistical Surveys and Estimations). The weaknesses of this DCPS are the voluntary announcement (the farmers are not paid for and therefore vary year by year) and the decentral method (data collection is the duty of different organisations which forward the data to SBV). In the case of financation it is planned to include organic data in the analysis. As organic data is not distinguishable within this DCPS, it is not suited as DCPS.

Schweizer Bauernverband (SBV): Price Statistic

The price statistic of SBV is harmonized to the international price statistic of Eurostat. The data are collected on processor and production level and at organisations (Swiss Granum, Proviande, etc.). Organic products are not included and accordingly not distinguishable. The quality of data is checked by experts and the information is disseminated by reports (Statistische Erhebungen und Schätzungen). The problem of this database is the same like at the production statistic: the data announcement is partly voluntary and free of charge and because of the integration of organic data it is not suited as case study.

30.5.2 Import / Export Level

Bio Suisse

This DCPS collects data about organic imports which get the label of the producer organisation BioSuisse (bud). The data collection concentrates on trade with third countries of EU, as Switzerland is not a member of the EU yet. The data can be segmented according product, product groups and country of origin and are collected at the importer level. The method of data collection is special, because there must be a request for acception the equality of standards to “bud”-standards. The data is collected at least once per year. About 60% of the import volume is registered, but this is not representative, because only the “bud”-labeled products can be surveyed. A direct comparision between organic and total data is not possible. The quality of data is not checked and the information is only communicated on request, because most of the data are confidential and only some are available. There is no harmonization to an international DCPS and no national data supply network. The weakness of the system is, that only imports, which get the acception of equality according BioSuisse-Standards, are registered. Because of the different weaknesses of the database and the concentration only on organic import data, especially on BioSuisse-imports, the DCPS is not suitable as case study.

Schweizerische Zentralstelle für Gemüsebau und Spezialkulturen

The DCPS of the Swiss cetral office for vegetables and special crops is called GEMIS2003 and collects data on fruit and vegetable imports to Switzerland both of

EU countries and of non-EU-countries. The data can be segmented by product, by product group and by country of origin and are collected by declarations at the border and the registrations of customs. This DCPS only registeres total data and does not distinguish organic data, because at import and export there is no division of cultivation manner and therefore there are no figures for organic imports. That is why there is no chance of integrating organic data within this DCPS. The method of data collection is the registration of figures of the custom authorities, which are prepared in regard of the needs of the sector. 100% of the import volume is registered weekly or monthly. The data is controlled by experts and disseminated by reports, of which the Annual Report SZG is the most important one. The DCPS is not harmonized to an international system and the data types are not official. But a national data supply network exists with Swissimpex of the Confederate Upper Customs Authority. There are plans for a further development, but details are not mentioned. As organic products are not respected in special, the DCPS is not suitable as case study.

30.5.3 Consumer Level

State Statistic Institute: Einkommens- und Verbrauchserhebung

The DCPS is called Einkommens- und Verbrauchserhebung (income and consumption survey) and collects data on consumer expenditures and the purchase frequency both on organic and total products. The data can be segmented on purchasing behaviour (purchase frequency), socio-demographic criteria (age, size of family, household income, gender, socioeconomic groups), spacial criteria (statistical regions) and products (all products and product groups), but an analysing is not everytime possible, because the sample sometimes is too small. The data covers a sample of the population and represents 97.9% of the population, which is the population that lives in private households. Therefore it is a representative approach. The participating consumers collect their consume in a household diary. Monthly these data are forwarded to the State Statistic Institute. It is possible to compare organic and total data. The quality of data is controlled by a computerized plausibility check and the data are disseminated once a year per reports and internet. Organic data has been disseminated only in 1998, but is alternatively will be not published for the years 2000 until 2005. Only a few data are confidential, the most are available for paying users (scientist, who sign a secrecy obligation). The data is partly harmonised to an international DCPS, for example the nomenclature of private consumption. A national data supply network does not exist. For 2006 a revision of the DCPS is planned. This DCPS could be a positive example for a case study.

IHA-GfK A.G.

The DCPS has been established in 1959 for total consumption. The Konsumentenpanel IHA-GfK (consumer panel) collects data on the penetration of products, the consumer expenditures, the consumption volume and the purchase frequency both on organic and total products. Organic data are integrated within the DCPS and distinguishable from total data. A segmentation of products is possible according buying behaviour (purchase frequency, choice of sales channel), socio-demopgraphic criteria (age groups, size of family, household income, education level,

gender, occupation), spacial criteria (market intelligence regions) and products (product groups, sales channels, brands, etc.). All product groups are covered by the investigation (milk, wine, cheese, desserts, eggs, spreads, yoghurts, fruits, meat, poultry, vegetables, frozen products). The data are weekly collected by household panel, household diary and retailer survey. The household panel is not scanner based, but a self-competion paper & pencil diary is used. 2.250 households are included, but it is planned to increase the sample to 5.000 households by 2005. The data covers a sample of the population. 95% are represented, Tessin is missing, nevertheless it is a representative approach. A comparision between organic and conventional data is possible. The data is controlled by experts. All information is available for paying users, they get a print-out of the data once per year. The DCPS is not harmonized to an international system and a national data supply network does not exist. The DCPS is a positive example for a case study.

30.5.4 Retail Level

Bio Suisse

BioSuisse collects data about the turnover only of organic products in the Swiss retail sector. The retail sales, the retail volumes per product group, the market shares of single product groups and the national consumer prices are surveyed. A segmentation of data is possible, according sales channels and product groups. The data collection is a representative approach, 100% of the retail sector in Switzerland is covered. The method of data collection is a combination of retailer questionnaires and analysing the data of the IHA-GfK retailer panel. A direct comparision between organic and conventional products is possible. The quality of data is not controlled. The survey is conducted at least one time per year. The data are disseminated by newsletters, internet and at the press conference of BioSuisse. All information is available, some with paying and some without paying. The DCPS is not harmonized to an international system. In future a harmonization of data collection is planned referring the method of data collection. As the DCPS only concentrates on organic products, it is not suited for a case study.

IHA-GfK AG

The Handelspanel (retailer panel) of IHA-GfK collects data both on organic and total products in the conventional retail sector in Switzerland. Organic data is integrated in the DCPS and distinguishable. The retail sales, the retail volumes per product group, the retail volumes per market type and the market shares of single product groups are evaluated. A segmentation of the data is possible according sales channels and product groups. For all products total data are collected, organic data includes only the relevant product groups. The method of data collection is a representative approach and allows a direct comparision between organic data and total one. The DCPS is not harmonized to an international system. Like the consumer panel of IHA-GfK, this DCPS is a good example for a case study.

ACNielsen

About the consumer panel of ACNielsen no responses were given by the company. However ACNielsen is able to distinct between conventional and organic retailing data for purposes of customer needs. ACNielsen runs both a household and retailer panel in Switzerland. For instance the Swiss retailer Migros buys data of conventional and organic product sales for the own company and for the main competitor COOP in order to compare the development of product groups in both company. However at general data from ACNielsen concerning organic product sales are not freely available and have to be ordered with high expenses.

30.5.5 Supply Chain Level

The Swiss controll and certification body bio.inspecta in co-operation with the Austrian ABG (Austria Bio Garantie) and Intact Consult and with the German Naturland e.V. founded the e-Cert IT GmbH with a software for inspection and certification. Each inspection and certification step is accomplished digitally. The inspection process is conducted in a completely paperless form by means of laptop or tablet PCs. The inspection is followed by the production of a report which is sent to the certifying organisations. In the office, the data is synchronized automatically. The software solution aims to become a common standard for inspection bodies, certifiers and other institutions such as researchers.

30.6 Conclusion

The availability of data on the organic sector in Switzerland is relative good compared to other European country based on the fact that the data collection process is quite centralised on less organisations. Nearly every level, where data can be collected is covered also for the organic sector. Regarding the production level, organic data are available on accountancies, farm structure, production and prices. In addition there are organic data on consumer level and retailer level available. Only supply balance sheets for organic products and the foreign trade of organic products are not yet covered. However the export activities of organic products from Switzerland are marginal anyway and therefore nearly negligible.

The quality of the available organic data in Switzerland is relative good. At every available level – nearly at every DCPS – the quality of data is controlled by data quality management systems. The method of data collection is mostly representative or based on a census.

There are 10 DCPSs which collect data on farm level. There are special DCPSs which cover only one product group, e.g. milk or vegetables or only organic products themselves. A closer cooperation between the several institutions collecting data on total and organic products would be helpful. The organisational effort could be reduced and this resources could be used for improving the data processing and analysing, the surveying of data on different levels or the harmonization to international DCPSs. Data on foreign trade of organic products which presently only were collected and published for the EU OMIaRD project should be collected, processed and published regularly. Presently only the “bud”-labelled products of BioSuisse (Organic farm association) are registered for foreign trade activities which only represents 60 – 70% of all traded organic products in Switzerland. At consumer and retailer level, the number of DCPSs is small, but the quality and information value of data is sufficient, as commercial market research institutes conduct this surveys and sell data.

31 Turkey

Country Report

TURKEY

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31.1 National relevance of organic farming

The organic area in Turkey is quite small. According Organic Europe 57.001 ha are grown organically, which is up to 0.14% of the total agricultural area and 18.385 organic farms exist, 0.09% of all farms (www.organic-europe.net/europe_eu/statistics-2001.asp, 10/2003). The Turkish Ministry of Agriculture and Rural Affairs (MARA) presented different figures. According the Ministry in September 2003 13.016 farmers cultivated 103.500 hectares organically and produced 359.131 tons of organic products. The production consists mainly of dried sultanas, figs, apricots, olive oil, honey, fruit compotes and jams, cereals and pulses. Nearly the whole Turkish organic production is exported, primarily to EU-countries, like Germany, France, the Netherlands, Switzerland and the United Kingdom. Turkey is becoming a major organic food exporter. According official export data, the export value has been 22 million US-$ in 2000, but estimations of market experts talk about at least the double amount. The domestic market is still small with 3 to 5 million US-$ of the overall Turkish food market of about 23 billion US-$, which leads to a diminutive organic market share of about 0.01 – 0.02% of the total food market. But the domestic organic market is growing with an annual growth rate of about 50% per year (USDA, 2001).

The implementation of organic agriculture in Turkey is mostly depending on processors. The processors need a special product and therefore they arrange treaties with producers to deliver this crop. Beside there are also farmers, who grow organically independently.In February 2004 the government implemented a discount on the credits for organic producers or processors. There is big governmental effort to develop organic agriculture and the internal market.

The work and process related to organic agriculture is carried out by a department under the directorate general of agricultural production and development, which is connected to the Ministry of Agriculture and Rural Affairs. The Turkish Ministry of Agriculture and Rural Affairs established an organic agriculture committee with representatives of different general directorates of the Ministry. The committee aims to improve and enlarge organic agriculture in Turkey and inspects the six control and certification bodies. The Ministry is responsible for inspecting and controlling the control and certification bodies` activities for being in the scope of the Turkish regulation for organic agriculture, which is in harmonization with the EU regulation.

31.2 Structure of national statistic/data provider in agriculture

In Turkey, five institution collect data on agriculture, production, processing, marketing or consume: the Ministry of Agriculture and Rural Affairs, the Undersecretary of Foreign Trade, the Aegean Exporters` Association, the State Institute of Statistics and the ETO (Ekolojik Tarim Organizasyonu). Four of these institutions gave a short overview about their data collection and processing system (DCPS) by answering the introductory questionnaire (Q1). The Undersecretary of Foreign Trade did not answer Q1 and referred to the DCPS of the Aegean Exporters` Association, because it is idem. Therefore two governmental, one semi-governmental and one non-governmental organisation have been surveyed.

31.3 Information about the surveyed institutions

The State Institute of Statistics, the ETO and the Ministry of Agriculture and Rural affairs run DCPSs on agricultural production and collect data on farm level. There are also three organizations which noted to run DCPSs which collect data on trade level (Aegean Exporters` Association, Ministry of Agriculture and Rural Affairs, State Institute of Statistics). In addition the State Institute of Statistics collects data on the whole production as well as on processing, wholesale and retail level. The Ministry of Agriculture and Rural Affairs runs a DCPS on policy relevant non-market indicators. Therefore in Turkey every sector is covered by a DCPS, except consumers (see table 31-1).

Table 31-1: Overview about the Turkish DCPSs

Level:	Ministry	Statistic Institute	ETO	Aegean Exporters
Farm level	x	x	x	
Wholesale/processor		x		
Retail level		x		
Trade (import/export)	x	x		x
Consumer level				
Whole production		x		
Policy relevant indicat.	x			

The Ministry also collects data on processing, but did not mentioned that in the questionnaire. The data on organic agriculture are provided from authorized control and certification bodies. Besides this, the agriculture province directorates of the MARA are trying to collect more data on organic.

In the following the institutions are described briefly:

State Institute of Statistics

The State Institute of Statistics is partner of Eurostat. It is a governmental organisation, financed by compulsory duties, with the main function of primary statistical data collection. The collected data are processed, archived, analysed and disseminated by reports, newsletters and the website www.die.gov.tr. Data are collected for crop products (fruits, vegetables, cereals, oil crops) and livestock products (meat and animals, milk, eggs, wool, hair, mohair). The DCPS does not respect organic products.

Aegean Exporters` Association

The Aegean Exporters` Association consists of 12 smaller exporter unions for several products. It is a semi-governmental organisation, financed by taxes and supports the export of Turkish products. Therefore the main purposes are market research for the members and primary statistical data collection on export level. Data are collected for crop products (fruits, vegetables, cereals, oil crops and others) and for processed products. Information is freely available by reports and electronic newsletters.

ETO (Ekolojik Tarim Organizasyonu)

ETO is the Turkish Organic Agriculture Association, located at the Ege University, Faculty of Agriculture in Izmir. The ETO is a non governmental organisation with the main functions of research and education. In addition it collects secondary statistical data, represents the interests of consumers, environment and organic agriculture and publishes media about farming, food industry and public topics. The organization is financed by voluntary subscriptions and projects. ETO only collects data on farm level for organic crop products (fruits, vegetables, cereal, oil crops) and organic non-food products. The information is disseminated in reports and at the website www.eto.org.tr.

Ministry of Agriculture and Rural Affairs (MARA)

It is a governmental organization with the main functions of secondary statistical data collection, public administration, certification (organic), education and ministry affairs. The major focus with respect to statistics is data collection, checking and processing, storage and dissemination. The Data Collection and Evaluation Section has been newly established under the Alternative Agricultural Production Methods Department. The Organic Agricultural Committee secretariat works also under this department. Data collection is done in cooperation with other institutions, like control and certification institutions, Aegean Exporters` Association and other governmental institutions. Data are collected on crops (fruits, vegetables, cereals, oil crops, others), livestock products (meat/animals, milk, eggs, fisheries) and processed products. All information is disseminated free of charge in reports, newsletters and on the website www.tarim.gov.tr.

31.4 Institutions which run ‘Organic DCPS’

Both the Aegean Exporters Union, the ETO and the Ministry of Agriculture and Rural Affairs run “organic” DCPSs.

31.5 Results of the second stage inquiry

The detailed second questionnaire has been sent to the four institutions, which answered the introductory questionnaire: the Ministry of Agriculture and Rural Affairs, the ETO, the Aegean Exporters` Association and the State Institute of Statistics. The State Institute of Statistics answered three Q2-questionnaires (import/export level, wholesaler/processor level and farm level) and the Aegean Exporters` Association sent back one questionnaire on export level. ETO and the Ministry of Agriculture and

Rural Affairs did not send back the second questionnaire. Nevertheless there is additional information about the DCPSs of the MARA.

Therefore there are two questionnaires on trade level, one on wholesaler/processor level and one on farm level. The main levels are covered thereby. As the domestic consumption and marketing is quite small in Turkey, it is less important to get information about a consumer or retailer DCPS there.

31.6 Detailed information about DCPS

31.6.1 Export / Import Level

Aegean Exporters` Associations: Export level

The DCPS is called AS 400 and only collects and processes export data, both for trade with EU-countries and with other countries. The data can be segmented by product and by country of destination. The data are collected weekly (total data) and monthly (total and organic data) at the ports and borders. All organic products have to be registered. Further data is available from certification bodies which have to prepare export certification documents. Organic data is integrated and distinguishable within the total data since 1996, which allows a direct comparision between organic products and total product trade. Data, both for intra- and extratrade, are collected by export notification (at registration step). There is no representative approach and no quality management system, nevertheless the data is mentioned to be reliable – the strength of the DCPS. As weakness the slowness is stated. The information is disseminated by reports. Some of the total data is confidential, but most is freely available, whereas all organic data is confidential.The DCPS is not harmonized, the export types are not official and there are no plans for further development or hamonization. Data supply networks do not exist. The DCPS is a positive example for a case study.

State Institute of Statistics: Import/Export Level

The innominate DCPS collects and processes both import and export data and both for extra- and intratrade. Data can be segmented by products, by product groups, by country of origin and by country of destination. Data are provided nearly for all product groups and are collected at ports and borders and imports. The DCPS covers only total data. Organic products are not respected in special and are not distinguishable within the DCPS. Data about intra- and extratrade are collected monthly by SAD (Single Administrative Document) and therefore 100% of the import and export volume is represented. By computerized plausibility checks, by visual checks of experts and by triangulation the quality of data is controlled. The information is published in reports, newsletters, internet and other media. The results are mostly available for paying users, but some data are also confidential.The DCPS is harmonised to Eurostat and therefore the import and export types are official. Data supply networks exist. The data is delivered to custom administration to the DCPS BILGE. The strength of the described DCPS of the State Institute of Statistics is the

coverage of all transactions. The system is planned to be improved by introducing a web-based system. Regarding the method of collection and analysing, the quality management etc. the DCPS could be a positive example for a case study, if organic products were distinguishable.

31.6.2 Processor Level

State Institute of Statistics: Processor Level

The DCPS on processor level is called Manufacturing Industry Survey Data and represents all privat enterprises with more than 10 employees and all public enterprises as well as a sample of private enterprises with 1-9 employees. At the processing industry data are collected at least once per year on the food processing level, the production volume level and the stock level relating quantities, prices and value added. The data can be segmented according country or region of origin and according product groups data are provided for. Organic data is integrated in the DCPS, but is not distinguishable from total data, because there is little or no demand from users for separate organic data. Therefore a comparision between organic and total data is not possible. The data covers 100% of the population, which is a representative approach for the relevant products: 100% of the fruit, vegetable, meat, milk and dry good processors are covered by the DCPS. The quality of data is controlled by computerized plausibility checks. Most of the information is available for paying users (only some data are confidential) and is disseminated by statistical almanacs. The DCPS is not harmonized to an international system and there are no data supply networks at a national level. The only weakness mentioned is the missing distinction of organic and conventional data, which makes the DCPS not suitable for a case study – although the method of data collection is creditable.

Ministry of Agriculture and Rural Affairs

The control and certification bodies provide data on processor level: the discription information, active areas and the quantities of products of processors. Information is available on the quantity of processed, fresh, dry, froozen, canned and concentrated products.

31.6.3 Farm Level

State Institute of Statistics: Farm Level

The data collection and processing is harmonized to the international systems of FADN (Farm Accountancy Data Network), FSS (Farm Structure Survey), the Production Statistic and the Price Statistic. Only total data are collected, organic data is not respected and distinguishable and therefore not comparable with total data.

The FADN (Farm Accountancy Data Network) of the State Institute of Statistics does not include the variables organic, in conversion and total. It is based on a representative approach referring all geographic regions (=strength of the DCPS), but not referring farm types. There is no supplementary data collection on organic farming under another project to guarantee a representative data collection also for farm types. A data quality management system exists by visual checks of experts and by a comparision with the data of the previous year. The information is disseminated by reports, newsletters and internet/ homepage.

The FSS (Farm Structure Survey) of the State Institute of Statistics does not respect the variables and does not record organic products separately. There are not any other DCPSs, which collect structural data on organic farms. The information is checked by experts and disseminated by reports, newsletters and internet/homepage. The most important publication is called General Agricultural Census – Results of the Agricultural Holdings Survey. The DCPS is based on agricultural holdings, which is mentioned as strength. There are no plans for a future development.

For the Production Statistic, data are collected in cooperation with the Ministry of Agriculture at district directorates based on district directorates as statistical unit. 100% of the area and 100% of the farmers are represented therefore. Organic products are not recorded separately within this DCPS. The quality of data is checked by experts and by a comparision with the data of the previous years. The information is disseminated by reports.

The Farm Price Statistic collects total data and does not respect organic data in special. It is collected by questionnaires on market levels (trader) by the Ministry of Agriculture and the quality is checked by experts and by a comparision with the data of the previous years. The information is disseminated by reports.

As both FADN, FSS, the Production Statistic and the Farm Price Statistic do not respect organic data and do not allow a distinction of organic and total data, the DCPS of the State Institute of Statistics is not suitable as example for a case study.

Ministry of Agriculture and Rural Affairs

The collection of data on producer level in Turkey is based on the information registered by the control and certification bodies. The data include the type, the hectares, the number of producers and animals, the quantitiy of products (meat, milk, joghurt in tons and eggs in pieces) and data on livestock production (number of

animals), which is very less. Data can be segmented according product types and geographic regions.

The actual problem of data collection and processing is the mixing of farmer and area quantity, when there is a different type of crop cultivation in the same area. A farmer can cultivate on the same field more than one crop and this can cause a problem to indicate the farmer number according to the product. A similar situation also occurs for fields. Hence cultivating more than one crop in the same area can be the reason of registering the same field two times in the database. But by preparing a new database programme, this problem should be solved in future.

31.6.4 Consumer / Retailer Level

Ministry of Agriculture and Rural Affairs

Data on consumer and retailer level is not available yet, but it is planned to establish. At the moment organic product consumption on the internal market is very low.

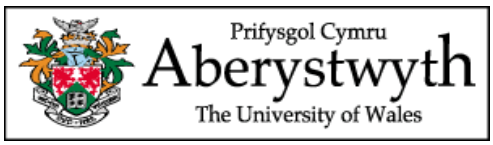
31.7 Conclusion

The availability of organic data in Turkey is limited. Data on exports of organic products are available. In addition there must be also data on organic production (farm level), but unfortunately the Turkish organic producer organisation ETO did not answer the second questionnaire about their DCPS. Therefore statements about the quality of data on farm level are not possible. Further the quality of export data is not assured, as there is no representative approach and there is no quality check, but the Aegean Exporters` Association designates the information as reliable. The data on wholesaler/processor level, farm level, import level and retailer level could be improved, if a distiction of organic data from total one were possible at other DCPSs. The missing information about consumption data is not important at the moment, because the consume of organic products is quite small at the moment. But with a growing domestic market, also the consumption of organic products should be registered and analysed.

32 United Kingdom

Country Report

UNITED KINGDOM



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32.1 National relevance of organic farming

According to DEFRA, 741,174 hectares of land were under organic management in the United Kingdom in March, 2003. This represents 4.3% of the British UAA. Of these, 204,308 ha were in conversion and 536,866 ha were certified. The number of organic producers was 4,104.

Table 32-1: Key Organic Farming Statistics – March 2003

	producers and growers	organic + in-conversion land (ha)
England	2622	251,836
Wales	618	55,101
Scotland	725	428,608
Northern Ireland	139	5,629
UK	**4104**	741,174

(Source: DEFRA)

The UK has the third largest organic market in the world, after the United States and Germany – and, according to the Soil Association Organic Food and Farming Report 2003, sales of organic food and drink in the UK reached £1 billion in 2002/03. The same report indicates that sales of organic food direct from the farm to the consumer – via box schemes, farmers' markets and farm shops – account for one-tenth of all organic food sold in the UK. Imports accounted for 56% of organic food and drink sold in the UK during 2002/03, falling from 65% in 2001/02 and 70% in 2000/01.

32.2 Structure of national statistic / data providers in agriculture

The response rate for the first stage questionnaire was reasonably high in the United Kingdom – 62.5%. As shown in the table above, some of the organizations which responded to the first stage questionnaire were private sector organizations – including consultancy firms or market intelligence organizations. These organizations (including AC Nielsen, Organic-Monitor.com and Organic Trade Services) did not complete the second stage questionnaire, for which responses were received only from non-governmental organizations, a government agency and a semi-governmental (research/education) organization.

Table 32-2: First Stage Questionnaire Responses – United Kingdom

Type of institution	Contacted	Responses
Governmental	1	1
semi-governmental	4	3
non-governmental	2	2
private (not for profit)	3	
private (for profit)	6	4
Total	**16**	**10**

Soil Association

The Soil Association is a non-governmental organization with a long history in the organic movement. The organization is involved in the areas of market intelligence, data collection (primary and secondary), research, education, media and advocacy/lobbying. The Soil Association charity organization is legally separate from the Soil Association certification body, Soil Association Certification Limited (SA Cert) – therefore the two are seen as distinct entities. The work of the Soil Association is financed by voluntary subscriptions/donations and user-paid services. The Soil Association is involved in all aspects of statistical data collection and processing. Work on organic production and market data is integrated in each department.
http://www.soilassociation.org

Henry Doubleday Research Association (HDRA)

The Henry Doubleday Research Association (HDRA) is a non-governmental organization, funded by voluntary subscriptions/donations and government funding for specific research projects. HDRA is Europe's largest organic membership organization, and is involved in research and promotion of organic gardening and farming. HDRA is involved in data collection (vegetable crops), analysis and reporting/dissemination. Work on organic production and market data is integrated in each department. Data is disseminated mainly via paper reports and newsletters, which are available publicly and free of charge.
http://www.hdra.org.uk

Table 32-3: Level of Data Collection – First Stage Questionnaire Responses

Farm	6
Production	3
Wholesaler / processor	3
Trade	1
Retailer	2
Consumer	3
Policy	3

32.3 Detailed information about DCPS, which include organic data collection

All the DCPSs described below relate exclusively to organic data. In other words, these are not total/general agriculture DCPSs which have organic identifiers or which include organic data – rather, these are 'separate' DCPSs for organic data.

The ten organisations in the UK which responded to the first-stage questionnaire were contacted in relation to the second-stage questionnaire. Of these, four responded - covering six DCPSs.

According to the questionnaire responses received, the only data from the DCPSs described below which is delivered to an international database is that collected by DEFRA (production statistics) and IRS/UWA (FADN). In all cases data is collected at least once a year.

Organic Food and Farming Report

The **Soil Association** produces the annual *Organic Food and Farming Report*, possibly the most authoritative/important publication in the United Kingdom on developments and trends in the British organic sector. The report covers policy developments as well as market trends and contains comprehensive statistics on production (land area, number of holdings, volume of production), value of organic output and retail sales, imports, and data on various market/sector trends. Data for key crop types and livestock categories, as well as for dairy products, is collected. Both volume and value of production are covered. Data is collected by means of census, surveys and based on expert estimations. Collection of data has taken place since 1997, and nearly the totality of the organically managed area and approximately 90% of organic farmers are represented by the DCPS. Triangulation is the main method used in assessments the quality of data.

The Soil Association works closely with Taylor Nelson Sofres to generate data on consumer purchasing behaviour and consumer characteristics, based on panel and other approaches. This has existed for a number of years now and provides a high

quality data set, some published in the annual report and other data published in more specialist documents.

Organic Agriculture Statistical Information System (OASIS)

The **Department for Environment, Food and Rural Affairs (DEFRA)** is the government agency responsible for official statistics on organic farming. It publishes statistical notices/bulletins with data on land area/number of holdings with a regional (NUTS 1) breakdown but without detailed breakdowns of crop types/land uses – see http://www.defra.gov.uk/farm/organic/site-map.htm. The data which is gathered by DEFRA refers to all registered organic holdings in the United Kingdom (therefore covering 100% of the organic land area and producers), and is supplied by the certification/control bodies. Data on all crops and livestock types is collected, and there are plans to include more detail at the crop level in future. In addition, there are plans to expand collection of data on processors' economic activities. The quality of the data collected by DEFRA depends to a considerable extent on the accuracy of the data collection carried out by the certification bodies. However, DEFRA is also involved with gathering data for the Farm Structure Survey and is looking at combining the administrative and statistically sourced data to improve the level of detail, accuracy and regional coverage.

Retailer Level : DEFRA has also been involved in efforts to identify retailer level data, in particular quantities sold by country of origin, but these attempts have met with less success due to commercial confidentiality issues.

Trade Level: Port Health Officials endorse the certifications of inspection accompanying third country imports. They now maintain a monthly record for DEFRA of all these organic consignments, giving data on quantities by CN code and importer.

Consumer Level: The Expenditure and Food Survey (EFS) commenced in April 2001. The target number of UK households is 7,850 and the target minimum response rate is 62%. It is a continuous survey of household expenditure, food consumption, and income. The primary uses are to provide information about spending patterns for the Retail Price Index (RPI), and about food consumption and nutrition. It will also feed into estimates of consumers' expenditure in the National Accounts, be used for tax benefit modelling and be an important source of economic and social data for government and a host of other research agencies. An organic diary page has recently been successfully trialled and is now planned to be incorporated into the EFS. This initiative will provide us with some customer trend data; as recommended in the Action Plan for England. The results will provide a wide variety of demographic analyses inc. National and regional comparisons, income comparisons, household composition, economic status etc.

32.3.1 Policy Level

European Statistical Data on Organic Farming (EU-funded policy projects)

The Institute of Rural Sciences and Organic Centre Wales at the University of Wales, Aberystwyth (UWA) have significant involvement in statistical data collection and dissemination. Organic farming statistics for the United Kingdom and Europe are published on the web site of Organic Centre Wales (http://www.organic.aber.ac.uk/statistics/index.shtml), and this part of the web site is consulted by a large number of researchers, policy makers and other analysts on a regular basis. Collection of European statistical data on organic farming commenced in 1993, as result of the organic research group's involvement in the EU-funded OFCAP project. However, for many European countries statistical data from as early as 1985 is available in the Aberystwyth DCPS. In terms of production statistics (land area, number of holdings), the database at Aberystwyth covers most European countries for the period 1985-2002 and can therefore be seen as one of the most important sources of statistical data on organic farming worldwide. The data is collected from multiple sources – statistical agencies, agriculture ministries, private organizations, certification bodies as well as organic sector NGOs. Triangulation is therefore a key element in the control of quality of the statistical data collected.

Statistical data collected for the project OFCAP was published in Volume 3 of the series Organic Farming in Europe: Economics and Policy under the title *European Organic Production Statistics 1993-1996* (C. Foster and N. Lampkin), published by Universität Hohenheim. Another report with the title *Organic and in-conversion land area, holdings, livestock and crop production in Europe* was produced by Foster and Lampkin in October 2000.

More recently, under the project EU-CEE-OFP, data at regional (in most cases, NUTS 2) level has been collected for the period 1997-2002. The main variables being covered are organic land area, broken down by crop type/land use (and conversion status, where available), livestock numbers, and number of producers. Regional data has been supplied by two main sources – national ministries and certification bodies. The database, covering all current EU Member States (EU-15) in addition to Switzerland and Norway, is currently under development. A first statistical report, which is one of the deliverables under the EU-CEE-OFP project, will be completed in April 2004 – with an update including 2003 data due in the autumn.

Farm Business Survey

The Institute of Rural Sciences at UWA is one of the centres responsible for the Farm Business Survey (FBS), the British version of FADN. The FBS includes some organic farms within its sample and the organic/in-conversion variable has been included since 1999, but these holdings are not selected to form a representative group,. The FBS system is based on a representative approach, and from a sample of 2845 farms approximately 3.65% (> 100 farms) were organic in 2001/02, a similar proportion to the overall number of organic holdings in UK agriculture. The number of holdings capture by the FBS has only increased relatively recently as a result of the large number of holdings that converted in 1999/2000. In order to address the data deficiencies, DEFRA has contracted IRS to collect FADN-type data on a specially selected group of organic holdings in England and Wales for the period 2001/02-2003/04. The two groups of data will be combined and compared with results from

similar conventional farms. The first results for 2001/02 are expected in May 2004. Reports for earlier years (from 1995/6, with a much smaller sample size) are published on the Organic Centre Wales website: www.organic.aber.ac.uk

The management of data quality for both samples is done by computerized plausibility checks. Among the strengths of this DCPS is the fact that the methodology/system is standardized. It also aims to record representative farm data on a regional and farm type basis. Dissemination of data is to be carried out by means of reports and the internet – however, dissemination of recent results has not yet been achieved.

IRS also produces financial benchmarking data (for Wales, as part of Organic Centre Wales) and gross margin estimates (published in the *Organic Farm Management Handbook* jointly with Elm Farm Research Centre).

The ***Henry Doubleday Research Association (HDRA*)** runs two DCPSs, largely focused on horticulture:

UK Horticultural Data (Vegetables and Fruit) DCPS

HDRA has been collecting organic horticulture data since 1996, largely as result of research demand. Data on prices and volumes of both organic outputs and inputs, as well as farm incomes, has been collected under this DCPS. The product groups covered are fresh vegetables, fruit and berries. No regional breakdown of data is available. Data is supplied to IRS/UWA for inclusion in a database, and is disseminated via advisors, the *Organic Farm Management Handbook* (2002/03) and various HDRA reports. One of the strengths of this DCPS is the good level of co-operation which exists between HDRA and producers, and another advantage is the fact that the DCPS is based on an established system (FBS/FADN). However, the quality of the data obtained varies by farm and the data samples are typically very small.

Data on farm prices (for wholesale and direct marketing) is collected from records kept by producers, and relates to vegetables and fruit. There is no system in place for data quality management.

UK Organic Vegetable Market DCPS

For the vegetables sector, data has been collected by HDRA at the processor and wholesaler level since 2001/02 as result of policy and research demand. Data is collected on production volumes, wholesale and packing quantities and prices as well as value added. The data is segmented by crop category and by country/region of origin. Data is collected from packers and wholesalers. The survey represents 70% of the population, and the DCPS represents 100% of the vegetable wholesalers/processors. All data collected is available free of charge, and the main medium of dissemination is a report. Visual check by experts and triangulation, as well as some 'peer review', are used for data quality management. HDRA cooperates with the Soil Association in relation to this DCPS.