Organic Market Data Collection in Europe
## - Current State and Prospects -

Dr. Toralf Richter

1   Introduction EISfOM project

2   Current state of organic market data collection in Europe

3   Retailer and consumer related data collection in Europe
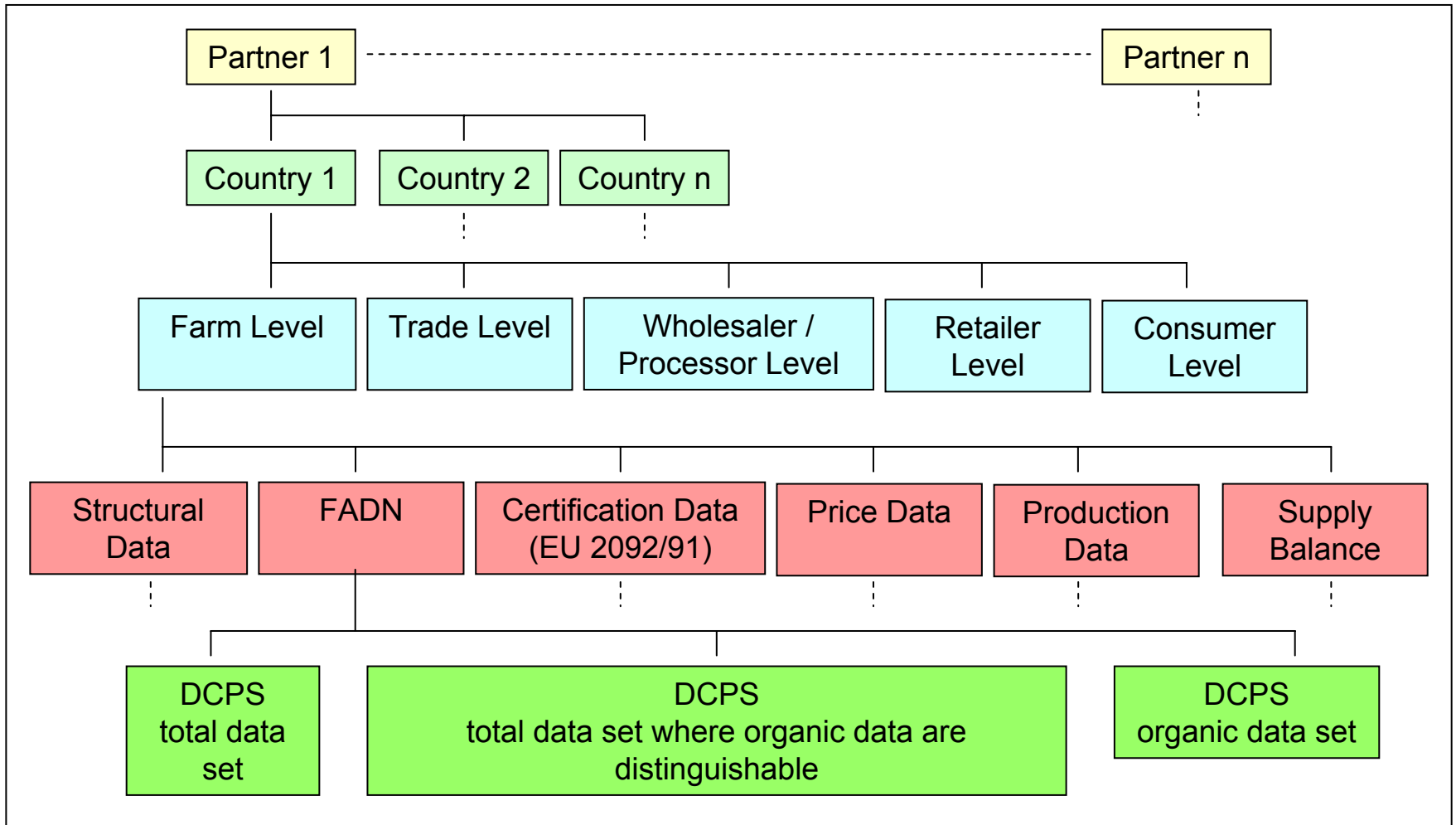
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1   Introduction – Why EISfOM started?

- European markets for organic products developed fast in recent years

- EU-research projects like OFCAP and OMIaRD and FiBL market studies have shown that in many countries data gathering takes place, however unsystematically

- Project results (OFCAP, OMIaRD) showed a high demand for organic production and market data

- However very basic data such as certified organic holdings, land areas and livestock numbers are reported currently

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1 Introduction – Project approach
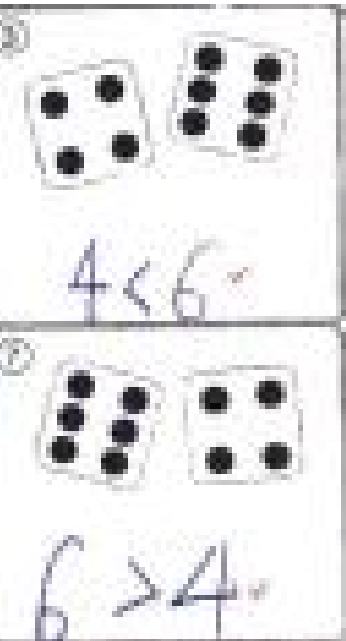
- Review current conventional and organic data collection and processing systems (DCPS) in Europe

- Develop proposals for harmonizing data collection and processing methods and improving data quality

- Case study research of European benchmarks in organic data collection and processing systems (DCPS)

- Prepare a framework for the development of a Europe-wide database for organic markets

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2 Current state of data collection – Approach to collect information

```
Partner 1  -------------------------------------------------------  Partner n

Partner 1
├── Country 1 ── Country 2 ── Country n
│
└── Farm Level   Trade Level   Wholesaler /      Retailer   Consumer
    │                          Processor Level   Level      Level
    │
    └── Structural   FADN   Certification Data   Price Data   Production   Supply
        Data                (EU 2092/91)                      Data         Balance
        │
        └── DCPS          DCPS                              DCPS
            total data    total data set where organic      organic data set
            set           data are distinguishable
```

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2 Current state of data collection - Evaluation of DCPS

1. Does exist at least one DCPS with organic data collection?

2. Does exist at least one DCPS where organic data are integrated into a total DCPS and distinguishable?

3. Does exist at least one DCPS which allows a direct comparison between organic and total data?

4. Does exist at least one DCPS with organic data which bases on a census or representative approach?

5. Does exist at least one DCPS with organic data collection at least once per year?

6. Does exist at least one DCPS with organic data where data / reports are disseminated at least once per year

7. Does exist at least one DCPS with organic data which run data quality management systems

2   Current state of data collection – European Overview

Farm Level - FSS	Austria	Belgium	Bulgaria	Czech Republic	Cyprus	Denmark	Estonia	Finland	Germany	France	Greece	Hungary	Ireland	Iceland	Italy	Liechtenstein	Lithuania	Latvia	Luxembourg	The Netherlands	Norway	Poland	Romania	Slovakia	Slovenia	Sweden	Switzerland	Spain	Turkey	UK	Total
1. At least one DCPS with organic data collection	x	x	x	x		x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x		x	x	x	x	x	x	x	x	28
2. At least one DCPS where organic data are integrated into a total DCPS and distinguishable	x			x		x	x	x	x			x		x	x	x	x			x	x					x	x				15
3. At least one DCPS which allows a direct comparison between organic and total	x					x	x	x	x	x					x	x	x			x	x					x	x				13
Filter: Only those DCPSs considered which apply for all paragraphs 1,2,3																															
4. At least one DCPS with organic data which bases on a census or representative approach	x					x	x	x	x						x		x			x	x					x	x				11
5. At least one DCPS with organic data collection at least once per year						x	x	x	x						x	x	x			x	x					x	x				11
6. At least one DCPS with organic data where data / reports are disseminated at least once per year						x	x	x	x						x	x	x			x	x					x	x				11
7. At least one DCPS with organic data which run data quality management systems	x					x	x	x	x						x	x				x	x					x	x				11

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2   Current state of data collection – European Overview

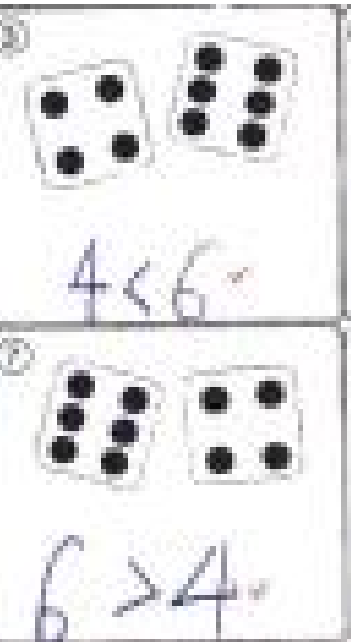| Farm Level - Production Statistics	Austria	Belgium	Bulgaria	Czech Republic	Cyprus	Denmark	Estonia	Finland	Germany	France	Greece	Hungary	Ireland	Iceland	Italy	Liechtenstein	Lithuania	Latvia	Luxembourg	The Netherlands	Norway	Poland	Romania	Slovakia	Slovenia	Sweden	Switzerland	Spain	Turkey	UK	Total
1. At least one DCPS with organic data collection	x		x			x		x	x							x					x					x			x	x	**10**
2. At least one DCPS where organic data are integrated into a total DCPS and distinguishable	x					x		x	x							x					x					x					**7**
3. At least one DCPS which allows a direct comparison between organic and total	x					x		x	x							x					x					x					**7**
Filter: Only those DCPSs considered which apply for all paragraphs 1,2,3																															
4. At least one DCPS with organic data which bases on a census or representative approach	x							x	x																	x					**4**
5. At least one DCPS with organic data collection at least once per year	x							x	x							x					x					x					**6**
6. At least one DCPS with organic data where data / reports are disseminated at least once per year	x							x	x							x										x					**5**
7. At least one DCPS with organic data which run data quality management systems	x								x							x										x					**4**

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2   Current state of data collection – European Overview

Foreign Trade Level	Austria	Belgium	Bulgaria	Czech Republic	Cyprus	Denmark	Estonia	Finland	Germany	France	Greece	Hungary	Ireland	Iceland	Italy	Liechtenstein	Lithuania	Latvia	Luxembourg	The Netherlands	Norway	Poland	Romania	Slovakia	Slovenia	Sweden	Switzerland	Spain	Turkey	UK	Total
1. At least one DCPS with organic data collection			x	x		x				x					x		x			x						x	x		x	x	**11**
2. At least one DCPS where organic data are integrated into a total DCPS and distinguishable																				x						x			x		**3**
3. At least one DCPS which allows a direct comparison between organic and total																				x									x		**2**
Filter: Only those DCPSs considered which apply for all paragraphs 1,2,3																															
4. At least one DCPS with organic data which bases on a census or representative approach																				x											**1**
5. At least one DCPS with organic data collection at least once per year																				x									x		**2**
6. At least one DCPS with organic data where data / reports are disseminated at least once per year																				x									x		**2**
7. At least one DCPS with organic data which run data quality management systems																				x											**1**

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3   Current state of data collection – Retailer level

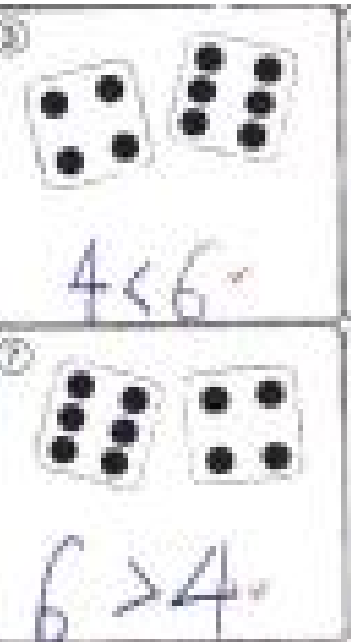| Retailer Level	Austria	Belgium	Bulgaria	Czech Republic	Cyprus	Denmark	Estonia	Finland	Germany	France	Greece	Hungary	Ireland	Iceland	Italy	Liechtenstein	Lithuania	Latvia	Luxembourg	The Netherlands	Norway	Poland	Romania	Slovakia	Slovenia	Sweden	Switzerland	Spain	Turkey	UK	Total
1. At least one DCPS with organic data collection				x				x	x						x					x	x						x			x	**8**
2. At least one DCPS where organic data are integrated into a total DCPS and distinguishable								x	x											x	x						x			x	**6**
3. At least one DCPS which allows a direct comparison between organic and total								x	x											x	x						x			x	**6**
Filter: Only those DCPSs considered which apply for all paragraphs 1,2,3																															
4. At least one DCPS with organic data which bases on a census or representative approach									x																		x			x	**3**
5. At least one DCPS with organic data collection at least once per year								x	x																		x			x	**4**
6. At least one DCPS with organic data where data / reports are disseminated at least once per year								x	x																		x			x	**4**
7. At least one DCPS with organic data which run data quality management systems									x																					x	**2**

- Private research companies have developed sophisticated data collection systems. However in most countries a public demand to get data available is missing.

- Statistics Denmark (DK): Organic sales data in conv. supermarkets

- Soil Association: (UK) Organic sales data

- ECO Monitor (NL): Organic sales data

- ZMP/ACNielsen (DE): Organic sales data for selected products

- BioSuisse/GfK (CH): Organic sales data

- PRO-BIO (CZ): Organic sales data

- BioVista (DE): Retail sales data for specialised organic shops

3   Current state of data collection – Consumer level

Consumer Level	Austria	Belgium	Bulgaria	Czech Republic	Cyprus	Denmark	Estonia	Finland	Germany	France	Greece	Hungary	Ireland	Iceland	Italy	Liechtenstein	Lithuania	Latvia	Luxembourg	The Netherlands	Norway	Poland	Romania	Slovakia	Slovenia	Sweden	Switzerland	Spain	Turkey	UK	Total
1. At least one DCPS with organic data collection	x		x			x			x								x			x							x			x	**8**
2. At least one DCPS where organic data are integrated into a total DCPS and distinguishable	x					x			x											x							x			x	**6**
3. At least one DCPS which allows a direct comparison between organic and total	x					x			x											x							x			x	**6**
Filter: Only those DCPSs considered which apply for all paragraphs 1,2,3																															
4. At least one DCPS with organic data which bases on a census or representative approach	x					x			x											x							x			x	**6**
5. At least one DCPS with organic data collection at least once per year	x					x			x											x							x			x	**6**
6. At least one DCPS with organic data where data / reports are disseminated at least once per year	x					x			x											x							x			x	**6**
7. At least one DCPS with organic data which run data quality management systems	x					x			x											x							x			x	**6**

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- Mostly representative approaches (household panel data)

- Data are available and customised for paying users (clients)

- Time series are rarely available

- An international harmonization and comparison of consumer related data presently is not possible

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European Information System for Organic Markets: Project Communication

Helga Willer, FiBL

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www.eisfom.org

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The EISFOM Internet Site

www.eisfom.org

- **Project Information**

- **Download of Project Publications**

  - *Proceedings Development of a European Information System for Organic Markets - Improving the Scope and Quality of Statistical Data. Proceedings of the 1st EISfOM European Seminar, held in Berlin, 26-27 April, 2004*
  - *Report Data collection and processing systems (DCPS) for conventional and for organic markets, including country reports*
  - *Report on proposals for the development, harmonisation and quality assurance of organic data collection and processing systems (DCPS)*

- **Relevant Links : Access to major sources of statistical information on organic farming**

The EISFOM Member Net www.eisfom.org

EISfOM European Information System for Organic Markets

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One of the ambitions of EISfOM is to form a base for communication between regional, national and European statistical offices as well as other officials collecting and processing data on the organic market.

If you would like to be involved in the project, please complete a questionnaire and return it to Alison Vaughan at the address below or e-mail: acv@aber.ac.uk

- English
- Français
- Deutsch

Alison Vaughan
Administrative Assistant
Organic Farming Unit
Institute of Rural Studies
University of Wales Aberystwyth
Llanbadarn Campus
ABERYSTWYTH
SY23 3AL
UK

Tel: +44 (0)1970 621626
Fax: +44 (0)1970 622238

www.eisfom.org

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The EISFOM Discussion Forum

1. Farm production
2. Farm incomes
3. Prices (various levels)
4. Trade (incl. import/export data)
5. Consumer/retailer data
6. Supply balances
7. General

Join the discussion list by registering via http://www.eisfom.org/logmember.html

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The next EISFOM Seminar, November 2005 in Brussels

- **2nd EISFOM European Seminar : A Framework for a European Information System for Organic Markets**

- **10./11. November 2005 in Brussels, further info www.eisfom.org**

- **Aim of the second EISFOM Seminar:**

  Consultation with national and international agencies and stakeholders, so that full support for final EISFOM-proposals can be achieved.

Relevant steps until November

1. **Identification of the current status of organic farming statistics in 32 European countries (Country Reports; finalized)**

2. **Compilation of ideas for potential improvements (First Seminar in Berlin 2004; finalized)**

3. **Evaluation of ideas through a series of national pilot studies (ongoing)**

4. **Establishment of recommendations**

5. **Discussion of recommendations (to start now, via the EISFOM member net; see presentation by Ulrich Hamm)**

6. **Identify proposals to be discussed at the Seminar in Brussels**

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Organic Market Data Collection in Europe – Current State and Prospects

Prof. Dr. Ulrich Hamm

1   Importance of statistics on organic markets in future

2   Recommendations how to build up international market statistics

3   Conclusions

Prof. Dr. Ulrich Hamm
Department of Agricultural and Food Marketing
organicagriculturalsciences **U N I** K A S S E L

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1   Importance of statistics on organic markets in future

Market overview becomes more complicated with

- **strong market growth**

  (quick changes of demand and supply surpluses)

- **increasing international trade**

  (demand surplus in one country, supply surplus in another)

- **price transparency due to different origins, standards and qualities**

  (prices do not signalise surplus and shortages due to growing price differentiation)

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1 Importance of statistics on organic markets in future

Market actors need valid data on the development of

- **production and consumption**
- **imports and exports**
- **producer and consumer prices**

to plan investigations.

Policy makers need valid data on the development of

- **production and consumption**
- **producer and consumer prices**

to evaluate and govern (market) policy measures

2 Recommendations how to build up international market statistics

2.1 Data on organic production

Approach 1 (building on existing statistics)

► **statistics on organic area and animals stocks (Eurostat) combined with**

► **data on organic yields from book keeping statistics as the Farm Accountancy Data Network (FADN)**

Problems:

• **FADN data are not representative for organic farms (enlargement needed)**

• **animal production is hard to generate from stock data**

• **timeliness (data are often not up-to-date)**

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2   Recommendations how to build up international market statistics

2.1 Data on organic production

Approach 2 (generating new statistics)

► obligation for all certifying bodies to report production data from organic farms in the same systematics (new law)

Problems:

• most certifying bodies are private (quality assurance of reported data needed)

• in some countries there are several certifying bodies (for harmonisation, uniform electronic data collection toods needed)

• additional workload for certifying bodies (question of funding)

Prof. Dr. Ulrich Hamm
Department of Agricultural and Food Marketing
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2   Recommendations how to build up international market statistics

2.2 Data on organic processing and wholesaling

No data available, therefore generation of new statistics

►   obligation for all certifying bodies to report data in the same systematics (new law)

<u>Problems</u>:

as mentioned before

2   Recommendations how to build up international market statistics

2.3 Data on sales of organic products as organic

No data available and not included in certifying process, therefore generation of new statistics

►   representative survey of farmer organisations, processors and wholesalers

Problems:

• **additional survey causes high costs**

2   Recommendations how to build up international market statistics

2.4 Data on international trade of organic products

No data available and not included in certifying process, therefore generation of new statistics

► adding an additional column „organic/non-organic" in national import and export statistics of agricultural products

<u>**Problems**</u>**:**

• **additional costs**

• **timeliness (data are often not up-to-date)**

2   Recommendations how to build up international market statistics

2.5 Data on organic consumption

Approach 1 (using the before mentioned statistics, if built up)

    production

+ imports

- exports

- sales of organic products as conventional

= consumption (leaving stocks unconsidered)

Problems:

• international trade data are published with a time-lag of up to two years

Prof. Dr. Ulrich Hamm
Department of Agricultural and Food Marketing
organicagriculturalsciences **U N I** K A S S E L

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2 Recommendations how to build up international market statistics

2.5 Data on organic consumption

<u>**Approach 2:**</u>

► **using data of retailer or household panels of private market research institutes (as AC Nielsen, GfK, etc.)**

<u>**Problems**</u>**:**

► **high costs for buying data from big market research companies**

► **coverage of retail panels (usually only conventional supermarket chains; hard discounters, natural food shops, health food shops, bakeries, butchers, etc. are not usually included) and identification of organic products (EAN codes must be known, problems with unpacked organic products)**

► **coverage of household panels (usually not included: foreigners) and lots of coding mistakes in diaries (example: free range eggs are seen as organic)**

► **not included in both panels: restaurants, canteens, etc.**

► **harmonisation of data between countries (product groups)**

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2 Recommendations how to build up international market statistics

2.6 Data on organic producer and consumer prices

Approach 1:

► **using data of existing surveys or panels (FADN for producer prices and panel studies of market research companies for consumer prices)**

Problems:

► **representativeness (especially FADN)**

► **high costs (especially panel studies)**

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2   Recommendations how to build up international market statistics

2.6 Data on organic producer and consumer prices

<u>Approach 2:</u>

► **generation of new price surveys (as ZMP in Germany)**

<u>Problems</u>**:**

► **sample size**

► **representativeness or high costs**

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Department of Agricultural and Food Marketing
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3 Conclusions

As long as organic markets are still niche markets, it is hard to convince governments, statistical offices and private market research companies to invest more money in building up organic market statistics.

However, there is a strong need for statistical data and some of them are easy to generate through the obligation of certifying bodies, especially data on production, processing and international trade.