ORGANICDATA NETWORK

Data network for better European organic market information

The case studies of the Organic Data network

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Introduction

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

UK	France
Germany	Czech republic
Italy	Mediterranean

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

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

Production data

- ✓ CB data for crop & livestock data
  - ✓ Common classification systems
- ✓ Different ways to estimate yield
  - ✓ Expert estimates
  - ✓ Trade body data (slaughterhouse, milk)
  - ✓ FADN data (consistent sample, size)
  - ✓ Producer surveys (also amounts sold as organic, farm prices, future intentions)

Retail data - multiples

- ✓ Product classifications not harmonised
- ✓ Panel data most commonly used
  - ✓ Household *versus* point of sale
  - ✓ Coverage < 100% of market
    out of house consumption
    non-bar coded products
  - ✓ Organic status of product lines
- ✓ Cross checking

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Retail data – non multiples

- Remain problematic – not one approach for all sales channels
- Approaches used
  - Survey of members of umbrella organisation (e.g. of farmers' markets and farm shops)
  - Collaboration with trade/sector bodies
  - Specialist panels
- Publication may improve future response rates

Overall market estimate

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

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Farm level price data

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

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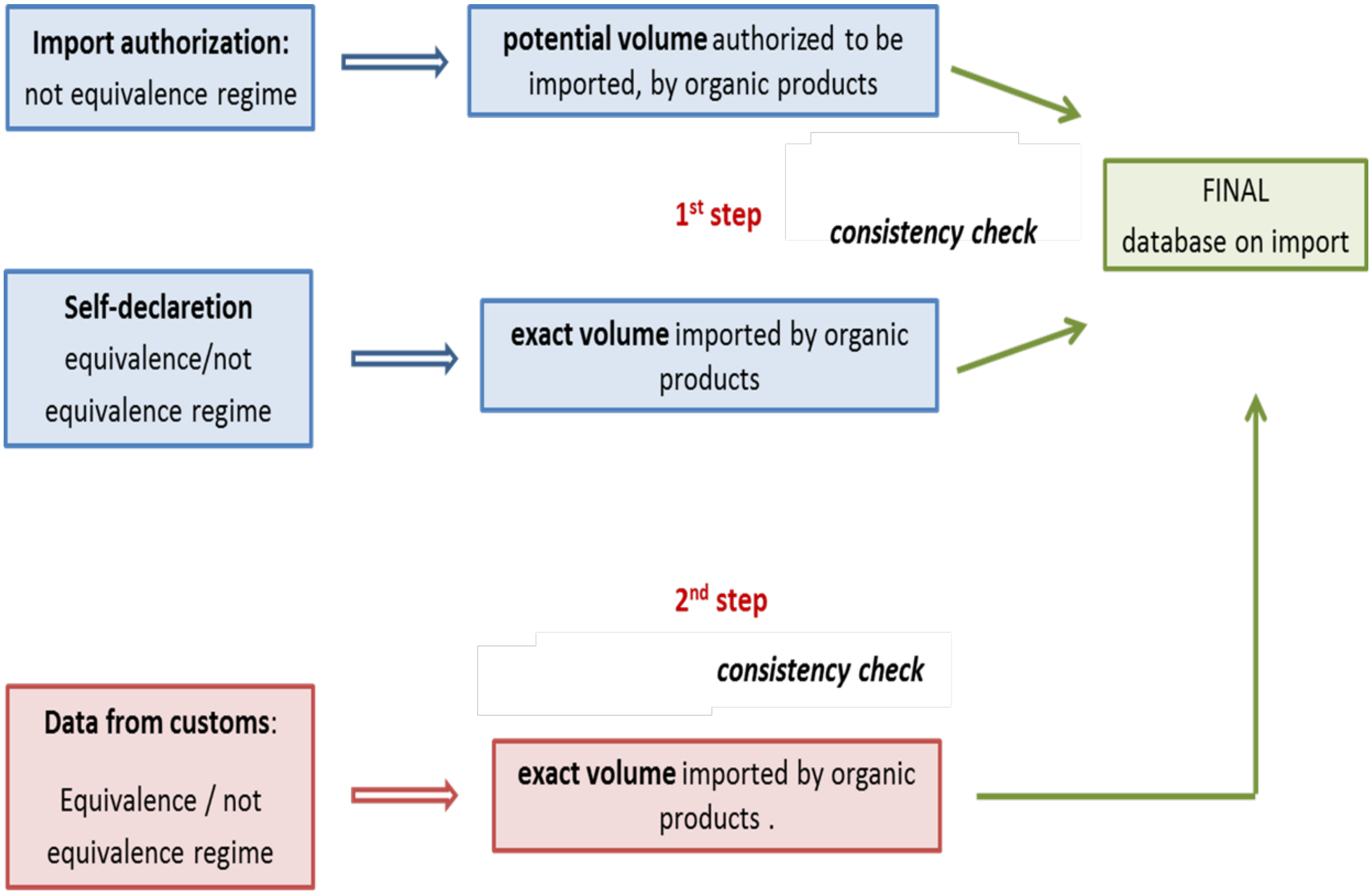
Comparing farm level prices (DE)

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

For example import data Italy



Additional info in SAD Box 44

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Import data

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

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Supply chain balances attempted

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

Making changes for improved quality

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

Conclusions

- ✓ *"Many cooks spoil the broth"*
  - ✓ Many different organisations
  - ✓ But of none has main task to collect organic market data
- ✓ Collaboration and data sharing likely to increase quality and prevent over-sampling of organic operators
  - ✓ Tension between market transparency and the need to protect commercially sensitive data
  - ✓ More active involvement of sector/trade organisations
- ✓ At national level aim for coherent and durable cross collection platforms
- ✓ Exchanging ideas and sharing experiences across borders can improve the data collection system and data quality