



## Editorial by project coordinator Raffaele Zanoli<sup>1</sup>

The OrganicDataProject is now almost at half of its life and this Newsletter reports about the results achieved so far.

Among these, we have two interesting reports on our surveys of organic market data and of organic data collection methods.

Besides, in March the first stakeholder workshop was held in Newbury, UK, to discuss the current issues of organic market data collection and how to move forward. A report of the workshop follows this editorial. Here I would like to stress that among the most debated issues at the workshop was the role that inspection bodies should have in making current data collection better – since they already collect basic structural data in their databases – and how and if these improvements should be made mandatory for all of them.

The workshop ended with the suggestion that the current revision of the EU political and legal framework for organic production, currently implemented by the Commission, is an occasion to improve current practices and methods of organic market data collection. OrganicDataNetwork partners, therefore, engaged in a discussion aimed at issuing a statement on data collection in view of this review. A draft statement was prepared and discussed in our online forum (<http://www.organicdatanetwork.net/odn-organicdataforum.html>).

The statement covers the following areas of improvement:

- full implementation of existing regulations on statistical information;

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- inclusion of further market data as mandatorily collected;
- harmonisation in the product classification and nomenclature, with specific reference to Eurostat codes;
- improvement of organic import/export data collection by minor amendments of the current EU customs regulations.

The statement is currently under revision after the comments posted on our online Forum and will be sent to the European Commission in the next few weeks.

The ultimate goal of OrganicDataNetwork is to make organic market information more accurate, more relevant and better available. In order to achieve this goal we encourage the largest participation to our online forum discussions by all relevant individuals, bodies and institutions. Please take some time to visit the forum and leave us your opinion about our project.

Thank You!

Prof. Raffaele Zanoli

Coordinator,  
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Photo: Project members at the Organic Research Centre near Newbury, UK

## Report from the first OrganicDataNetwork workshop

Kai Kreuzer<sup>2</sup>

A public discussion on the improvement of organic market data collection in Europe is now open at the OrganicDataNetwork Forum<sup>3</sup> as one initiative resulting from the first stakeholder workshop, which took place on 13 March 2013. The project "Data network for better European organic market information (OrganicDataNetwork)" aims to increase the transparency of the European organic food market to meet the needs of policymakers and actors involved in organic markets. It is funded under the 7th Framework Programme of the European Union and runs from 2012 to 2014. Over 40 stakeholders from 17 European countries and from Morocco and Tunisia attended the workshop held at the Organic Research Centre in the UK. After the workshop, a regular project meeting took place on 14 and 15 March 2013.

Participants in the workshop identified problems in data collection, improvement opportunities, and

ease of implementation as well as the main areas for which good organic market data are difficult to obtain (in terms of availability and quality): retail sales, international trade and price data. Among the key suggestions, participants named the collection of missing relevant data; harmonisation of organic market data in terms of both methods and of classifications and definitions; and mandatory collection of market data by control bodies to improve both the inspection system and market transparency. The idea is also to give technical support for data collectors through the provision of advice and a handbook, as well as the creation of national round tables for the exchange of ideas on data collection issues. They could work as an efficient network and improve the results. Finally, the use of Rural Development Programmes and other funds would provide incentives for better organic data collection. The planned revision of the Council Regulation (EC) N° 834 / 2007 is an opportunity to review current practices and methods of organic market data collection.

What types of data collectors are there? According to a survey among organic data collectors carried out as part of the OrganicDataNetwork project by the Organic Research Centre, there are government bodies, control and certification agencies, wholesalers and processors, retailers, importers and exporters, market research institutes and universities which collect data and deliver figures concerning the organic market. The methods used to collect data are e-mail surveys, census, experts' estimates, telephone surveys, face-to-face surveys or different panels such as household or retail panels. In this field, the University of Kassel with

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<sup>3</sup> <http://www.organicdatanetwork.net/odn-organicdataforum.html>

**OrganicDataNetwork NEWSLETTER**

Data network for better European organic market information

Professor Ulrich Hamm and Corinna Feldmann are analysing the current situation of organic market data collection and processing in terms of relevance, accuracy, comparability, coherence, accessibility and clarity, and punctuality. They have identified problems that need to be tackled. "Especially data on retail sales volumes or import and export volumes of organic products for important organic agricultural assets are missing in the majority of European countries", Mr. Hamm said. The organic agricultural land area, and the number of operators, production and livestock have only been quite accurately reported in the last few years in most countries.

While in some countries, only one organisation deals with organic market data collection (or at least only one organisation replied to the Kassel survey), in a few countries more than one organisation collects organic market data. These organisations often deal with various types of data and collect data for different purposes and hence use different collection methods. Although the majority of the reports are publicly available (87 percent), a minority of studies and findings (13 percent) are only accessible if purchased, or they are not published at all.



Photo: Burkhard Schaer, Ecozept, Dorian Fléchet, Agence Bio, Ulrich Hamm, University of Kassel, Raffaele Zanolì, Università Politecnica delle Marche

"One size fits all" is no solution, according to Dr. Susanne Padel, senior researcher at the Organic Research Centre and partner in the OrganicDataNetwork. "There are different possibilities, different ways of working and collecting data. "Between June and August we will discuss how and what can be improved in the existing data collecting systems in six case studies", says Dr. Padel. Dr. Mathias Stolze from the Research Institute of Organic Agriculture (FiBL) in Switzerland, suggests that each European state should institute regular payment for the routine

collection of organic data. "There has to be a Europe wide network that coordinates this urgently needed data collection."



Photo: Entrance of the Organic Research Centre near Newbury, UK

Dr. Helga Willer from FiBL explained the availability of data in the different countries. The area figures are reported regularly by 39 European countries that are included in the market data survey of the OrganicDataNetwork project. Total retail sales are only known in 34 of these countries. Regarding export or import figures by product, they are only known by 7 countries, and by 5 countries in terms of value (euros). In terms of volume in tons, only 3 countries have figures for the export and import of different products. She also suggested an online database containing all country figures and reports, which can be regularly updated.

Professor Raffaele Zanolì from Università Politecnica delle Marche, and coordinator of the OrganicDataNetwork project, stated: "We intend to use the newly created forum to further discuss and refine the challenges related to organic market data collection. This information will feed into a second workshop in Bari, Italy (July 10-11, 2014), which will focus on the solutions to the problems that were identified. We strongly encourage all stakeholders in organic market data collection to join the forum and to give input as to which issues need our attention most.

The workshop has made it very clear how important it is that we as a project consortium provide guidance to data collectors regarding suitable methods. I am happy to announce that one of the next products of the project: a multimedia presentation explaining good practices in data collection, will tackle exactly this need." A detailed summary of the workshop results will be published by the OrganicDataNetwork project consortium soon and will be available at the project's website [www.organicdatanetwork.net](http://www.organicdatanetwork.net).





## Results of the OrganicDataNetwork survey on collection methods of organic market data

Corinna Feldmann<sup>4</sup>

An online survey and a complementary telephone survey of organic market data collectors in Europe were carried out during 2012 – yielding 126 useable responses. The survey gave an overview of the current situation of data collection and also yielded information on the collection methods used and the quality checks applied. This article summarizes the key results.<sup>5</sup>

The majority of the organisations that responded to the survey used their data for statistics and market information. However, about 90 percent of the respondents claimed that they compile data, while only 55 percent also conducted basic statistics, such as calculating frequencies and percentages. More advanced statistics were carried out very rarely: mainly for retail sales data. Data quality checks were applied by about 70 percent of the organisations. Unfortunately, details of data quality checks were only given by 49 respondents and mainly referred to comparisons with data from previous years and other sources. These quality checks were mainly applied on production volume data. Comprehensive conclusions from the question on sample sizes cannot be drawn because only few organisations responded to that question. Hence, if the number of responses is broken down to the different countries and the different types of data, the resulting picture will be very heterogeneous.

The largest proportion of organic market data is collected annually and also published annually. Consumer and farm level price data are collected more often and often published on a weekly basis.

This reflects the great importance of timeliness with regard to price data. The most common way of publishing data is via the internet. About half of the respondents also named online and paper reports as well as statistical tables as the formats used for data publication. According to the responses of the survey most of the organic market data collected in Europe is at least partly available to the public.

In the survey report a special focus was put on the data collection methods as they form an important basis for harmonising the organic market data situation in Europe. The collection methods were analysed individually for each data type. This was done to investigate the compliance of data type and collection methods and thereby detect inconsistencies in the methodological approaches. However, figures have to be handled with care, as the underlying database was very heterogeneous and incomplete. For most data types there is one data collection method carried out most frequently, revealing the conformance of these approaches; e.g. for export volume and value data, most organic market data collectors that replied to the survey use e-mail surveys to obtain their information (Table 1). It is striking that many organisations compile their data through expert estimates, although expert estimates are not an acknowledged data collection method. This finding reflects the current situation in the organic market sector, in which a viable information infrastructure has not been established throughout all European countries yet. Although a system of compiling data by only using expert estimates should be avoided, they can be a valuable addition for data quality checks.

In addition, the survey results were the basis for further data analysis and categorisation according to the data quality dimensions:

- relevance, accuracy,
- comparability,
- coherence,
- accessibility/clarity, and
- timeliness/punctuality.

For the assessment of data quality, these dimensions were applied to a number of datasets. The ranking of the performance for each parameter of the data quality dimensions and the procedure for their evaluation was described in detail in the concluding report. Thereby the reader gets an insight into the data quality evaluation approach chosen in this study. Furthermore, organisations interested in the evaluation of their data quality learn how to apply the concept in order to reveal

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<sup>5</sup> The results of the survey will be published as Deliverable 3.1 of the OrganicDataNetwork project: Corinna Feldmann and Ulrich Hamm (2013): Report on collection methods: Classification of data collection methods. Kassel University, Witzenhausen



inconsistencies and improvement possibilities in their own data collection, processing, and publication approach.

In a next step, the organic data network will now compile a multimedia presentation, explaining good practice in data collection.

### Further reading

Corinna Feldmann and Ulrich Hamm (2013): Report on collection methods: Classification of data collection methods. Kassel University, Witzenhausen; to be published at the project website

Table 1: Most frequently used data collection method by data type according to the OrganicDataNetwork survey on data collection methods

|                             | Data collection methods by data type (most frequently used) |
|-----------------------------|---|
| <b>Production volumes</b>   | Census  |
| <b>Production values</b>    | Expert estimates  |
| <b>Retail sales volumes</b> | Consumer/household panel                                    |
| <b>Retail sales values</b>  | Consumer/household panel and e-mail survey                  |
| <b>Farm level prices</b>    | Telephone survey  |
| <b>Consumer prices</b>      | Consumer/household panel and telephone survey               |
| <b>Import volumes</b>       | Census  |
| <b>Import values</b>        | E-mail survey   |
| <b>Export volumes</b>       | E-mail survey   |
| <b>Export values</b>        | E-mail survey   |



## Report on the OrganicDataNetwork's European market data survey

Helga Willer<sup>6</sup> and Diana Schaack<sup>7</sup>

One of the aims of the OrganicDataNetwork project is to collect, store in a common format, and provide access to currently available data on organic markets in Europe.

The corresponding survey on currently available public organic market data was carried out between July 2012 and March 2013. The survey focussed on the data for 2011. It was led by the Research Institute of Organic Agriculture (FiBL) and the Agricultural Information Company (AMI). Most partners contributed to the survey by sourcing organic market data from their own country as well as for further countries for which they had agreed to take responsibility.

The most important survey tools were an Excel questionnaire, including the product classification, which was designed as part of this project; the database for data storage designed by FiBL and AMI; and excel pivot tables for data analysis and publication.

The OrganicDataNetwork survey on European published market data has shown that a wide range of market data is available. The tools that were designed for data collection, processing, storage, and analysis have shown to be valid instruments for the European collection of these data: even if some improvements and adjustments will be needed for the next survey. This applies in particular to the area of classification and nomenclature of retail sales, export and import data and a resulting adaptation of the questionnaire. Furthermore it would be good if the accessibility of the data via dynamic tables could be developed further. In order to ease the data collection process in the future, the building of a European network of data collector

as foreseen by the OrganicDataNetwork project is of highest importance.

The first survey on European published market data has shown that a number of challenges are associated with the currently available organic data. The key challenges encountered are:

- The lack of data in many countries even for key indicators (Figure 1);
- Incomplete data (data are available only for a part of the market; product breakdown only available for a part of the products, Figure 2),
- Non-harmonized classifications and nomenclatures, varying level of data depth, non-harmonized aggregations.

All these factors make harmonized data storage and country-to-country comparisons a big challenge.

In spite of all these issues, a number of results have been achieved that were not available before, and that applies in particular to the retail sales data. These data show – in a European comparison – what products do best within the organic segment and how certain products and product groups do in comparison with all products sold. The data show for instance that eggs are by far the most popular organic product across most countries that have such data, followed by vegetables, fruit, and dairy products. With regard to international trade data, the survey has shown that there is a major lack of such data and that no conclusions can be drawn regarding the European situation.

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**Report on the OrganicDataNetwork's  
European market data survey: Graphs**

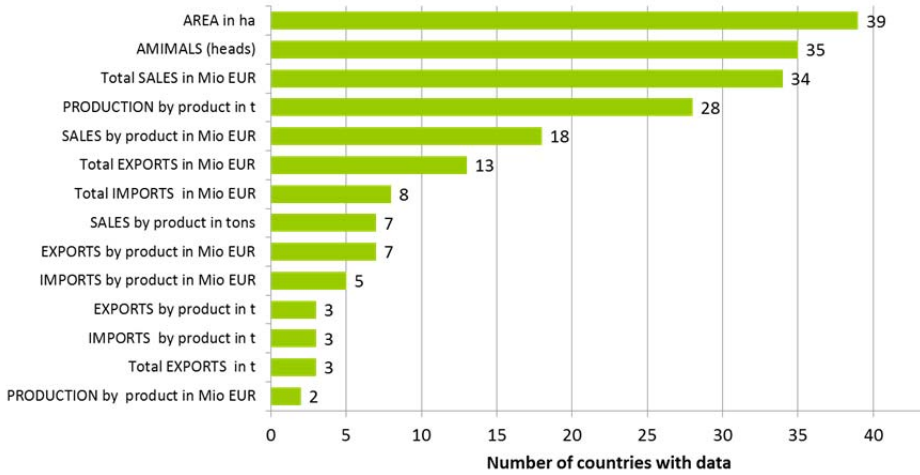


Figure 1: Data availability for organic market data by indicator in a European comparison (n=39)

Source: OrganicDataNetwork survey based on national sources

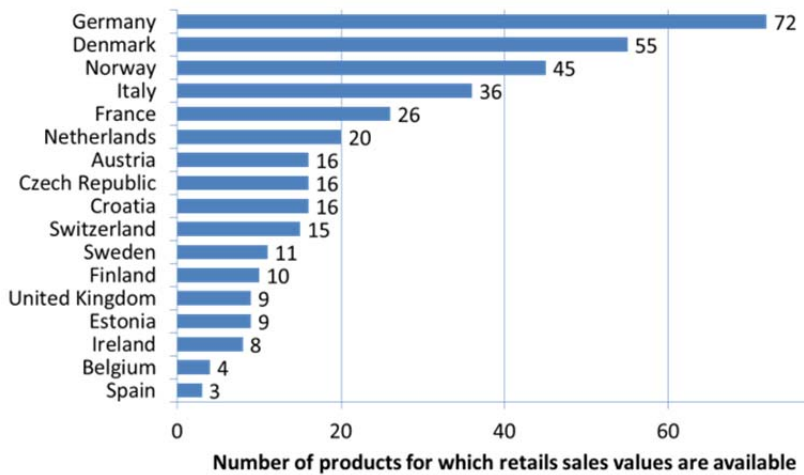


Figure 2: Number of products or product groups for which organic retail sales values are available

Source: OrganicDataNetwork survey 2013 based on national data sources



## The OrganicDataForum – the webforum of the OrganicDataNetwork

Robert Home<sup>8</sup>

A web forum has been established to provide an electronic tool to facilitate interactive information exchange between and among stakeholders and project partners. The primary aim of the forum is to facilitate a discussion on relevant issues. Access to this forum should be included on the project's webpage [www.organicdatanetwork.net](http://www.organicdatanetwork.net)

Since the goal is to provide a platform for horizontal and vertical communication, the web forum is open to all interested stakeholders in organic market data in Europe. The current themes under discussion are based around the workshop that took place in England in March 2013.

Any participants in the forum are however able to initiate discussion threads on any relevant topic that is of interest to them. The forum is particularly useful for gaining expert opinion on any topics related to organic market data collection and distribution.

## The OrganicDataNetwork at BioFach 2013

A session on the European market at the BioFach Congress 2013 was organized by the OrganicDataNetwork project partners. Recent data on the European market, as well as some first project results were presented. The following presentations were given.

- Marco Schlüter, IFOAM EU Group, Belgium
- Dr. Helga Willer, FiBL, Switzerland: [The European Market](#)
- Camille Moreau, L'Agence BIO, France: [The French Organic Sector](#)
- Dr. Susanne Padel, Organic Research Centre, United Kingdom: [The UK market](#)
- Diana Schaack, Agrarmarkt Informations-Gesellschaft mbH (AMI), Germany: [News about the organic market in Germany](#)

- Dr. Burkhard Schaer, Ecozept GbR, Germany: [A glimpse on organic markets in Eastern Europe](#)
- Corinna Feldmann, Universität Kassel, Germany: [Assesment of data quality](#)

Furthermore a session on Organic Market Data Networks was organised by the European-funded SOLINSA project, which aims to identify barriers to the development of Learning and Innovation Networks for Sustainable Agriculture (LINSA). The goal of this workshop was to encourage dialogue and an exchange of ideas and experiences about effective structures and forms of networks in organic market data collection and distribution. The workshop was based around participation and dialogue: characterised by short presentations and detailed discussions.

All presentations are available at the project website at

<http://www.organicdatanetwork.net/2441.html>.

## Upcoming events

July 2-4, 2013: **7th European Organic Congress of the IFOAM European Group**

Location: Vilnius, Lithuania

<http://organic-congress-ifoameu.org/>

October 3-4, 2013: **4th meeting of the OrganicDataNetwork project**

Location: Montpellier, France

May 15-16, 2014: **5th meeting of the OrganicDataNetwork project**

Location: Tallin, Estonia

July 10 and 11, 2014: **Second Workshop of the OrganicDataNetwork project**

Location: Bari, Italy

More information on the project's and related events is available at

<http://www.organicdatanetwork.net/1769.html>

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## About the OrganicDataNetwork project

The project "Data network for better European organic market information" (OrganicDataNetwork) aims to increase the transparency of the European organic food market through better availability of market intelligence about the sector to meet the needs of policy makers and actors involved in organic markets.

It is funded under the 7th Framework Programme of the European Union and runs from 2012 to 2014.

The project OrganicDataNetwork aims to meet the needs of policy makers and actors involved in Of the European organic food market through better availability of market intelligence about the sector.

Work is carried out in nine work packages:

Work package 1: Stakeholder integration and coordination centre

Work package 2: Inventory of organic market data collectors

Work package 3: Evaluation of existing methods of organic market data collection

Work package 4: Collection, handling and publication of organic market data

Work package 5: Development and test of methodologies for data quality improvement

Work package 6: Case studies on improving data quality in selected countries/region

Work package 7: Synthesis and recommendation

Work package 8: Dissemination

Work package 9: Project coordination and overall management

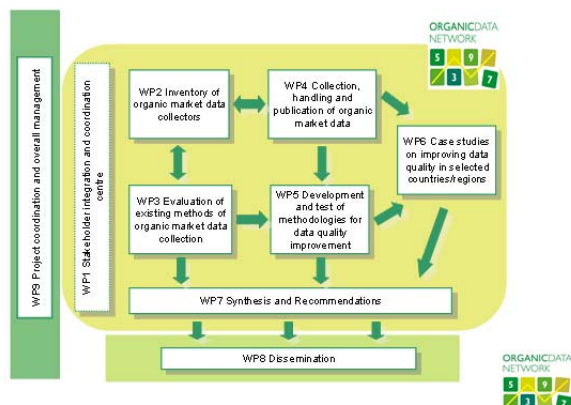


Figure: The work packages of the OrganicDataNetwork

To achieve these objectives, the OrganicDataNetwork project includes 15 partners (from 10 countries) who collect, publish and analyse such data. This partnership will closely cooperate with the European Commission, Eurostat, and statistical offices of the Member States, using existing structures for collecting and processing data on the organic market and stimulating the development of new ones by adapting existing models.

The partnership will act as a co-ordinating centre between stakeholders, and will result in a proposal for the establishment of a permanent network to achieve collaboration on statistical issues regarding the organic market.

### The project partners of the OrganicDataNetwork

The OrganicDataNetwork has 15 partners from 10 European countries. The project is coordinated by the Polytechnic University of Marche in Ancona, Italy.

- [Università Politecnica delle Marche \(UPM\)](#), Italy
- [Research Institute of Organic Agriculture \(FiBL\)](#), Switzerland
- [Organic Research Centre \(ORC\)](#), UK
- [University of Kassel \(UKS\)](#), Germany
- [Czech University of Life Sciences Prague \(CULS\)](#), Czech Republic
- [Mediterranean Agronomic Institute of Bari \(IAMBI\)](#), Italy
- [Agence Bio](#), France
- [Agricultural Market Information Company \(AMI\)](#), Germany
- [Bio-Markt.Info](#), Germany
- [Biocop Productos Biológicos](#), Spain
- [Ecozept](#), France
- [Centre for Ecological Engineering](#), Estonia
- [IFOAM EU Group](#), Belgium
- [IMO-CONTROL](#), Turkey
- [Soil Association](#), UK



## Imprint

### About this newsletter

The newsletter of the OrganicDataNetwork project is published by Organic-Market.Info, the Research Institute of Organic Agriculture FiBL, and the Politechnic University of Ancona on behalf of the OrganicDataNetwork Consortium. The project „Data network for better European organic market information“ (OrganicDataNetwork) is co-financed as a Collaborative Project by the European Commission, under the Seventh Framework Programme for Research and Technological Development (Grant agreement No 289376).

This newsletter is available at project website at <http://www.organicdatanetwork.net/newsletter-odn.html>. The newsletter is published twice per year. More information is available at the project website [www.organicdatanetwork.net](http://www.organicdatanetwork.net).

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