

## **Deliverable Factsheet**

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### **Brief description of the Deliverable**

Report on the demand for data by end users of organic market data

### **Target audience(s)**

Collectors of organic market data. Policy makers involved with organic market data

### **Publishable Summary**

High quality organic market data is desirable and important for both economic and societal reasons. Currently, important market data do not exist in most European countries, standardization is missing and data are seldom comparable within one country over time and between countries. Furthermore, detailed information on specific commodities is missing. The goals of this report are to identify the needs and demands of end users of organic market data, and to find areas of information asymmetry, which involves undertaking an appraisal of the quality of the existing available data that is used. However, many different data collection methods are currently used and the variety of agencies collecting data in the various European countries mean that gaining a European level overview of the quality of existing data is difficult. Despite these difficulties, this report presents an overview of end users demands for different

data types at a European level, and offers an overview of the end users demand for various data types in five European countries: France, Germany, Italy, and Spain. An online survey was conducted in which demand and use was assessed for 15 data types. Furthermore, the quality of each of these data types was rated against a set of quality criteria. It was found that relevance of data is the fundamental quality criteria, and relevant data will be used; even if it considered as being of poor quality against other quality criteria. Many respondents report using data that is considered by experts to not exist, which suggests that data users make use of whatever data they can find if it considered relevant. Many respondents report that existing data does not exist, which suggests that the users cannot find the data and therefore points to dissemination problems.

**Potential Stakeholder impact(s)**

The weaknesses and problems that are identified in this report will inform those who attempt to improve the European organic market data supply.

**Interactions with other WPs Deliverables / joint outputs**

WP no.	Relevant tasks	Partner(s) involved	Context of interaction
2	Task 2.2	P2, P3, P4.	Comparison of viewpoints of collectors and users



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**Data network for better European organic market information**

Collaborative Project

Collaborative Project targeted to a special group (such as SMEs)

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Data network for better European organic market information

**Title of Deliverable:**

**D1.1 Survey of the organic market data needs of end users**

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# 1 Introduction

High quality organic market data is desirable and important for both economic and societal reasons. The economic rationale for public sector investment in information and statistical data provision is based on issues of market failure. Policy interventions can be considered justifiable if they either have the effect of moving an industry more towards the perfectly competitive market model or address specific cases where markets do not operate in the way posited in this model. In particular, lack of information can lead to sub-optimal decision-making and functioning of markets through information asymmetry, absence of transparency (particularly in price setting) and increased costs and investment risks. The societal rationale is related to the economic in that organic farming is supported by public money, and it is reasonable, or perhaps inevitable that taxpayers demand the transparency that is provided through reliable and valid data.

In most countries, only very basic organic data such as certified organic holdings, land areas and livestock numbers are reported. Currently, important market data, e.g. the amount of production, consumption, retail sales, international trade or producer and consumer prices, do not exist in most European countries. Often, there are only rough estimates of the levels of production and consumption in some European countries. No official statistics of the European market for organic food exist. Data are collected and published by various bodies, including governments, private companies and academic research institutions. However, they often show contradictory trends, and this can lead to very different interpretations of the market situation and lack of willingness of operators to respond to likely growth areas. Standardization is missing and data are seldom comparable within one country over time and between countries. Furthermore, detailed information on specific commodities is missing.

Clearly the supply of organic market data in Europe has a need for improvement, and prioritisation of the areas to be targeted for data improvements requires an understanding of the demands of end-users of organic market data. The **Goals** of this report are to identify the needs and demands of end users of organic market data, and to find areas of information asymmetry, which involves undertaking an appraisal of the quality of the existing available data that is used. The appraisal of existing data also informs task 4.2 of the OrganicDataNetwork project. The wishes of these end users are particularly important since they are also the potential end-users of any future organic market information system. However, many different data collection methods are currently used and the variety of agencies collecting data in the various European countries mean that gaining a European level overview of the quality of existing data is difficult.

Despite these difficulties, this report presents an overview of end users' demands for different data types at a European level, and offers an overview of the end users' demand for various data types in five European countries: France, Germany, Italy, and Spain. These four countries were chosen because 10 or more respondents from each of these countries reported that they use each of the data types that were the focus of this study (see table 1). The number of responses allowed for a more detailed analysis for these countries.

It is beyond the scope of this paper to compare the data collectors in each country or the data collection methods that they employ. Similarly, no attempt has been made to discuss or propose possible solutions to the shortcomings that are identified in this paper. The purpose of this paper remains to identify and describe.



## **Important note about the structure of this report**

In this report, the overviews at the European level and the overviews for each county are presented at the beginnings of each of the respective sections. Readers who wish to gain more in depth information about the demand for specific data types: either at the European level or at the country level, will find that information following the overviews of each section.

### **The results in this report are structured as follows**

Overview at European level (Section 3.1.1)

Overview at country levels (Sections 3.2 to 3.1.5)

Description according to data type at European level (Section 3.2)

Detailed description by county with detailed descriptions by data type (Section 4)

## **2 Method**

### **2.1 Participant selection**

For the survey, an existing address database of 561 end users maintained by the Research Institute for Organic Agriculture (FiBL) was used. This list of addresses was supplemented by the address database managed by the International Federation of Organic Agriculture Movements (IFOAM) and an address database managed by [www.organic-bio.com](http://www.organic-bio.com). These organisations were (understandably) unwilling to provide us with an address list but instead forwarded an invitation to participate. The number of recipients of the invitation who are end users of organic market data is unknown.

### **2.2 Survey design**

Essentially, the survey was in three parts:

Part 1: demographic data about the participant,

Part 2: quality of the available organic market data, and

Part 3: unmet needs for organic market data.

To gain information about the organic market that is available for each respondent, a filter question (Question 7) was included in which participants were asked:

- a) the frequency with which they use particular data types,
- b) which data types are available and accessible, but that they never use, and
- c) which data types are either inaccessible or unavailable to them.

The data types included in the survey corresponded to those included in the data holder survey on data collection methods conducted in the OrganicDataNetwork project (task 2.3).

### 2.2.1 Survey Part 1 Demographic data

Participants were asked about their organisation, their role within the organisation, and the area in which the organisation operates.

### 2.2.2 Survey Part 2 Quality of the available organic market data

The questionnaire was programmed so that participants who indicated that a particular data type was available and that they use it were then asked questions about the quality of the data (of that type) that they use and where they source that data. Assessing quality of data is problematic. Although the characteristics that contribute to quality data may seem clear, defining data quality is difficult, and deriving quantitative measures for data quality even more so. Data quality is not well defined in current practice (MIT, 2010) although several dimensions recur in many definitions including: accuracy, credibility, relevance, and timeliness. Eurostat (2012), in their quality assurance framework, point out that a clear and uniform articulation of data quality metrics is needed. Many organizations currently use a framework consisting of relevance, accuracy, timeliness, accessibility, coherence, and comparability. Karr et al. (2005) introduced an economic dimension, which included that data be available when needed and also included a cost factor.

In creating the metric to be used in this study, we selected the measures that we judged to be most sensible based on experience of data handling in the organic sector, but added two additional criteria: a user assessment of overall quality, and a user assessment of the sufficiency of the data for the individual's needs. The list of quality criteria that were included in the survey and for which respondents could indicate agreement or disagreement is as follows:

That each data type

- is affordable,
- is available as often as I need it,
- is relevant to me,
- is accurate,
- is up to date,
- is easily accessible,
- is comparable with other data that I use,
- is of high quality,
- is sufficient for my needs.

If respondents reported that a particular data type is available but that they never use it, they were asked to indicate on a 5 point Likert scale how strongly they agree with statements about why they don't use that data type. The statements were based on the same quality criteria. Throughout this report, we refer to respondents who express agreement or disagreement with statements about various data types. For simplicity in these descriptive statistics we consider those who responded with either 'strongly agree' or 'agree' to have expressed agreement, and consider those who responded with either 'strongly disagree' or 'disagree' to have expressed disagreement.

The data types were selected to be as close as possible to the data types used in Task 2.2 and are shown in Table 1.

**Table 1: Data types in the surveys in Tasks 1.2 and 2.2 of the OrganicDataNetwork project**

Task 2.2: Inventory of data collectors	Task 1.2: End user survey
	Structural data about organic agriculture
Production (volume)	Organic production (volume and/or value) data at farm level
	Organic production volume data at wholesaler/processor level
Production (value)	Organic production value data at wholesaler/processor level
Retail sales (volume)	Organic sales (volumes and/or values) data at retailer level
Retail sales (value)	
Price – farm level	Organic price data at farm level
International trade – import (volumes)	Data on organic import volumes
International trade – export (volumes)	Data on organic export volumes
International trade – import (values)	Data on organic import values
International trade – export (values)	Data on organic export values
Catering sales (volume)	Data on commercial/public organic procurement volumes
Catering sales (value)	Data on commercial/public organic procurement prices
	Household data (per capita organic food consumption or household expenditures)
Price – consumer level	Retail consumer price data for organic food
	Organic price data at wholesaler/processor level

### 2.2.3 Survey Part 3 Unmet needs for organic market data

If the participants answered that a particular data type is inaccessible or unavailable, they were asked whether they would use that data type if it was available and whether they feel disadvantaged because of the lack of that data. The responses were coded from strongly agree =5, through to strongly disagree =1. Finally, participants were given the opportunity to make any further comments about anything that was not covered by the survey.

## 2.3 Survey operationalisation

The survey was created using a commercial online survey provider 'online-umfrage.de'. Pretesting was initially done inside the project consortium, and the modified questionnaire pre-tested at the Czech University of Life Sciences in Prague.

Participants were sent an email with a link to the online survey on June 14, 2012. On following the link, the respondents were assigned an individual code so that they could complete the survey in more than one session. Respondents were sent a reminder on June 18, 2012, and a second reminder on June 26, 2012. The survey was closed on July 4, 2012.

## 2.4 Respondents

The link to the invitation text was followed by 816 people, of whom 390 (48%), answered at least one question and the data they provided can be used for describing the purposes for which they use organic market data, their organisation type, and their role within the organisation. There is no way of knowing why the remaining 426 people declined. Of the 390 people who started the survey, 256 (65%) answered question 8, which means that they provided data that is usable for assessing needs and quality of the data types. A list of countries with respondents is in table 2.

**Table 2: Number of respondents per country**

Country	Respondents	Country	Respondents
Albania	1	Latvia	1
Armenia	1	Luxembourg	2
Austria	10	Macedonia	3
Belgium	6	Moldova	1
Bosnia and Herzegovina	3	Netherlands	18
Bulgaria	2	Norway	1
Croatia	1	Poland	2
Cyprus	1	Portugal	5
Czech republic	2	Romania	4
Denmark	6	Slovakia	1
Estonia	3	Slovenia	1
Finland	5	Spain	28
France	36	Sweden	5
Germany	74	Switzerland	13
Greece	13	Turkey	7
Hungary	4	U.K.	18
Ireland	5	Ukraine	1
Israel	1	Outside Europe	5
Italy	46		

The number of responses by country shows that 40% of the responses (328) came from France, Germany, Italy, the Netherlands, Spain and the UK. These are all countries with a more developed organic market corresponding with a higher number of organic operators and thus a higher number of potential end users of organic data. The higher number of respondents from these countries probably reflects that a larger number of people from these countries were invited to participate, which means that there are more people from these countries on the databases that were used in the sampling. This representation in the databases might be due to a higher demand for organic data, or that organic data is more relevant to their business for end users from these countries. Our sampling method, in which private databases were used, doesn't allow calculation of the response rate per country. However, the three largest organic markets in Europe (Germany, France and Italy) were the countries with the largest numbers of responses.

Below, we will first of all present an overview of the entire survey results (Europe level) followed by an overview of the survey results from those countries where we received 20 or more responses so that the usable sample contained at least 10 respondents who used each data type: France (n=36), Germany (n=74), Italy (n=46) and Spain (n=28).

### 3 Overview at European and country levels

#### 3.1.1 Europe overview

Of the 390 respondents who started the survey, 152 (39%) worked for organic producers, 113 (29%) for distributors of organic produce/products, and 86 (22%) for processor of organic products. 164 (46%) respondents were engaged in executive/management, 97 (27%) in sales, and 80 (22%) in marketing. The primary uses for organic market data are marketing strategy formulation (41%), decision support (39%), strategy/policy development (34%), research (26%), and forecasting (23%) (Note: these total more than 100 percent as each respondent was allowed to indicate more than one use). The regions described by the data that are used are primarily national data (62%), and also to a large extent regional data (41%). Approximately 32% of the respondents use international European data or whole of Europe data, while 20% of the respondents use data from non-European countries or data on world level respectively.

The respondents expressed that 'relevance' is always the main quality need for existing data that they used, with other quality indicators ranked about equal: namely that data should be affordable, available as often as needed, accurate, up to date, easily accessible, comparable with other data that respondents use, of high quality, and sufficient for the respondents' needs. The most common criticisms of organic market data were with regard to accessibility, availability as often as needed, and whether it is up to date. Data on organic import volumes was also criticised on its accuracy and comparability with other used data, while retail consumer price data for organic food and organic sales data at retail level were both criticised on their affordability. When asked about available data that is not used, the main reason was lack of relevance. Price and comparability were rarely the reason, and infrequency and inaccuracy were almost never the reason. The majority of respondents reported however that the quality of the data was rarely the reason that it is not used.

In many cases, the frequencies of responses to export volume and value data were very similar or the same against all of the quality criteria. Using the same means of comparison, import volume and value data, and commercial /public organic procurement price and volume data were evaluated very similarly. These data types are all considered to be quite different from the data collection perspective, but seem to be bundled from the end user perspective. When asked about data that is unavailable, about 30 respondents (up to 25% of respondents) could not access each data type, although most would use the data if available and would wish for monthly or annual data to be available for all data types. There was an almost universal expression of feeling at a competitive disadvantage because of lack of available data for all data types.

#### 3.1.2 France: Overview

The range of the 36 respondents from France was quite broad and all of the data types were used. Organic production volume data at wholesaler/processor level, organic production value data at

wholesaler/processor level, and organic price data at wholesaler/processor level; data on organic export and import volumes; and data on organic export and import values, were allocated identical frequencies of agreement and disagreement responses against all of the quality criteria so there appears little point in separating these data categories in the case of France. Data relevance and affordability were the quality characteristics that were most commonly given for most data types by French data users for the data that they use. Exceptions to this trend were data on organic export and import volumes, for which accuracy and comparability were the quality characteristics of these data types, and data on commercial/public organic procurement volumes and prices, for which accessibility and availability were the most agreed characteristics. The French respondents most frequently disagreed that data is available as often as needed for all data types, and that the data is accessible, up to date, and accurate for several of the data types.

### **3.1.3 Germany: Overview**

The 74 respondents from Germany also represented a broad of organizations and positions and all of the data types were used. Data on organic import volumes data on organic import values, data on organic export volumes and data on organic export values were all rated as being of particularly low quality in Germany. The frequency of respondents who agreed or disagreed with the quality statements when rating the two latter data types were identical Data on commercial/public organic procurement volumes and prices were receives nearly identical response frequencies against all of the quality criteria and were rated as being of relatively high quality in Germany. Mean responses to the rating question about the overall quality of data used in Germany were above the European average except for farm level data and international trade data, which were both rated quite poorly. International trade data was reported to be of extremely poor quality. Data relevance was the most common reason given for using any of the data types, which suggests that relevant data will be used if available: even if it is rated poorly against other quality criteria. It is interesting to note that poor quality data are from farms and from the international context, which are the two borders of the scale: farm and global.

### **3.1.4 Italy: Overview**

A broad range of respondents also participated from Italy (n=46) and all of the data types were used. International trade data, public procurement data, and retail and household data were all rated as being of particularly low quality in Italy. The response frequencies for the data on commercial/public organic procurement volumes and data on commercial/public organic procurement prices for all of the quality indicators were identical. Respondents treated the data on organic export volumes and data on organic export values identically. The quality of organic market data in Italy was found to be around the European average in all of the data types, with the exceptions of production data at farm level, and for consumer price data, which were rated above the European average. Data relevance was the most common reason given for using any of the data types, which suggests that relevant data will be used if available: even if it is otherwise of poor quality.

### **3.1.5 Spain: Overview**

The 28 respondents from Spain were also from a broad range of organizations and positions, and all of the data types were used. Structural data at farm level, production volume data at wholesaler/processor, data on organic export values and household data (per capita organic food consumption or household expenditures) were all rated as being of particularly low quality in Spain. Respondents treated data on organic import volumes and data on organic import values identically.

Data on commercial/public organic procurement volumes and prices were treated similarly by respondents and were rated as being of relatively high quality in Spain. Organic market data in Spain was rated rather poorly throughout, and scored below the European average for most data types. Exceptions to this trend were data on public procurement, which was rated relatively highly, and three of the four types of international trade data that were rated above the European average. The international trade data type that was rated poorly was organic export

### 3.1.6 Quality ratings for each data type

The mean overall quality ratings for each data type and for each of the four main countries are shown in Figure 1. To facilitate comparison between data type and country, the responses to questions asking for agreement or disagreement that each data type meets the quality criteria were recoded so that -2 signifies strongly disagree, 0 signifies neither agree nor disagree, and 2 signifies strongly agree. This coding applies throughout the presentation of results. More specific descriptions of the results for each data type at the European level are presented in section 3.2 and are followed by the specific country reports in section 5.

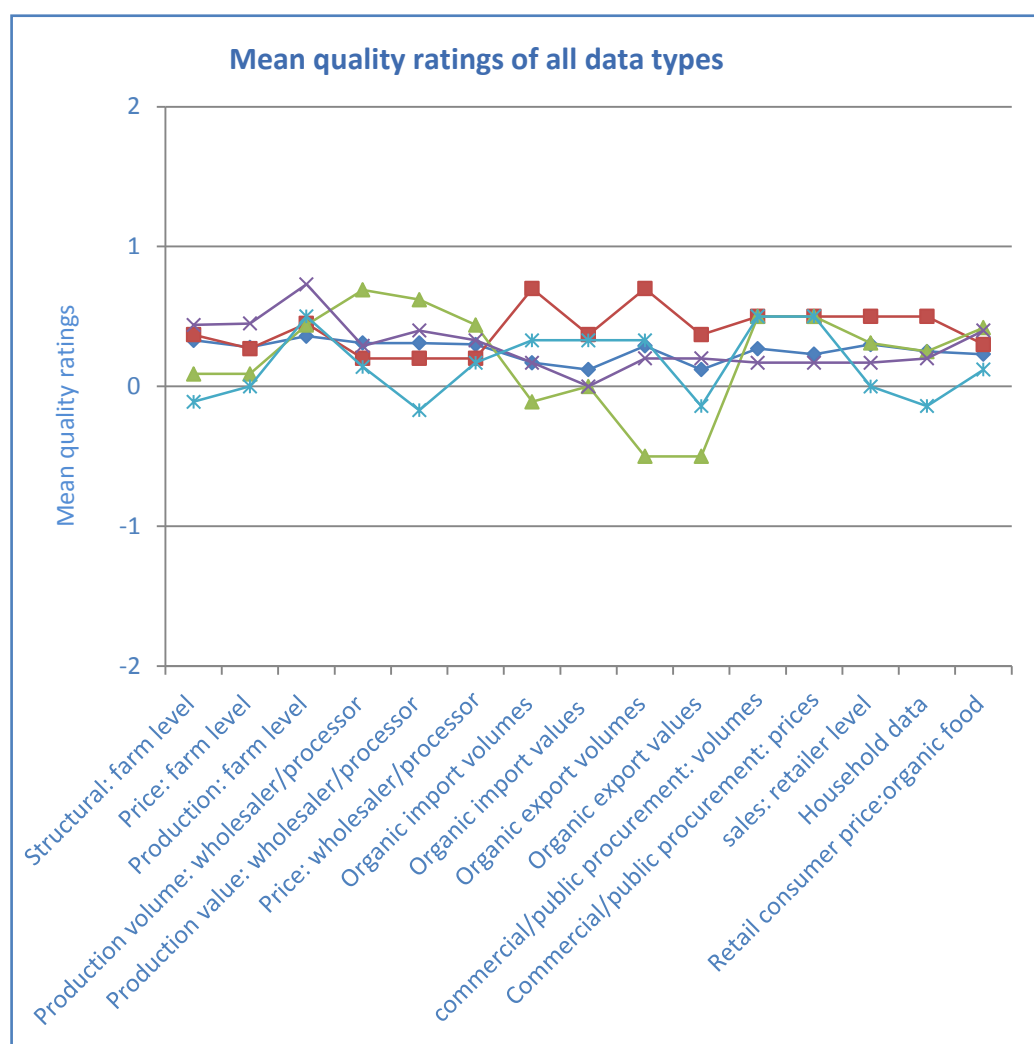


Figure 1: Mean ratings of overall quality for specific data types (-2 = Low quality, 0 = Neutral, 2 = High quality)

## 3.2 Results for each data type at European level

### 3.2.1 Structural data about organic agriculture at farm level

Structural data about organic agriculture at farm level is used by 169 (66%) of the respondents. It is available to 22 (9%) people who choose not to use it, and is not accessible to nine (3.6%) respondents. Eight (3.2%) respondents report that this data type does not exist. Of those who choose not to use the data type, lack of relevance and difficulty of access were the most common reasons offered. By far the majority of respondents reported that the reasons supplied as options in the questionnaire were not the main reason for not using this data type, which means that the data quality is not the reason why specific data types were not used. 80 % of those who do not have access to the data would use it if it were available, mostly monthly, and these people feel that they are disadvantaged due to a lack of that data. Of the 169 people who do use structural data about organic agriculture at farm level, 109 people (68%) responded that it is relevant to them and 74 (46.3%) people reported that it is affordable. Approximately 35% of the respondents agreed, and 30% were non-committal that it is timely, accurate, up to date, and accessible. 27% agreed that the data was comparable with other data that they used. Only 11.3 % of those who use this data type disagreed that it was of high quality, although the mean quality rating for this data type across Europe was 2.33 (sd=0.83).

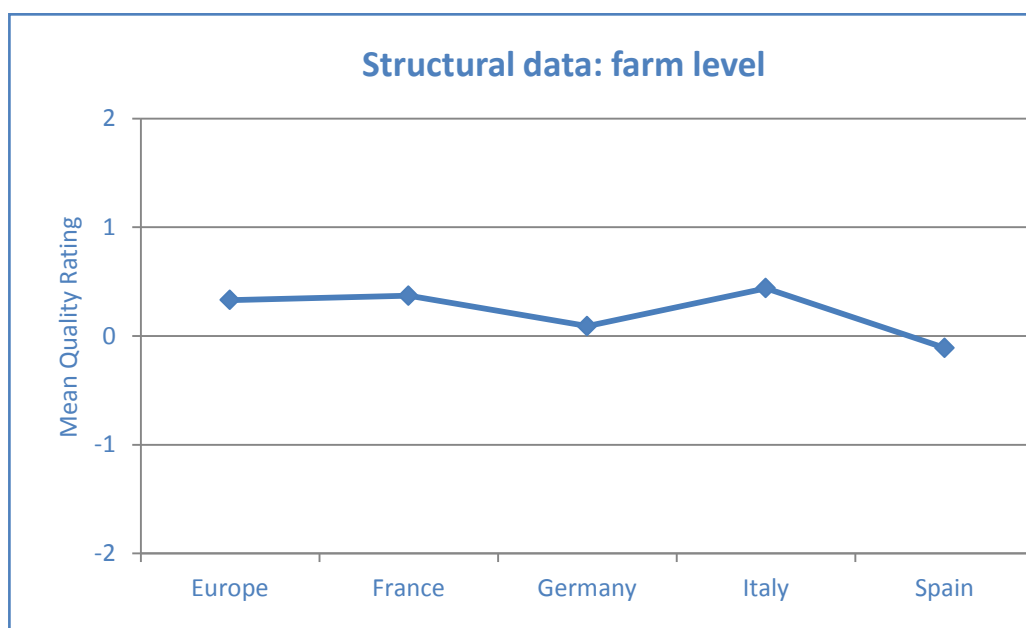


Figure 2: Mean overall quality rating for structural data about organic agriculture at farm level (-2 = Low quality, 0 = Neutral, 2 = High quality)



### 3.2.3 Organic price data at farm level

Organic price data at farm level is used by 143 (55%) of the respondents. It is available to 19 (7.5%) people who choose not to use it, and is not accessible to 18 respondents (7.1%). 20 (7.8%) respondents report that this data type does not exist. Of the 38 people for whom organic price data at farm level is not available, 70% indicated that they would use it monthly or more frequently, and 75% indicated that they feel disadvantaged due to lack of this data. The main reasons given for not using the data if it is available were lack of relevance (65%) and lack of comparability with the data that the respondent uses (43%). The majority of respondents indicated that the data quality was not the reason that they choose not to use this data type. Of those who do use organic price data at farm level, there appears to be agreement that the available data is relevant (68%) but that it lacks comparability with other data that is used. Disagreement was expressed about the data being available as often as it is needed (27%) and that it is easily accessible (25.6%). The overall rating of the quality of this data type is slightly positive, with a mean rating of 2.18 (sd=0.83).

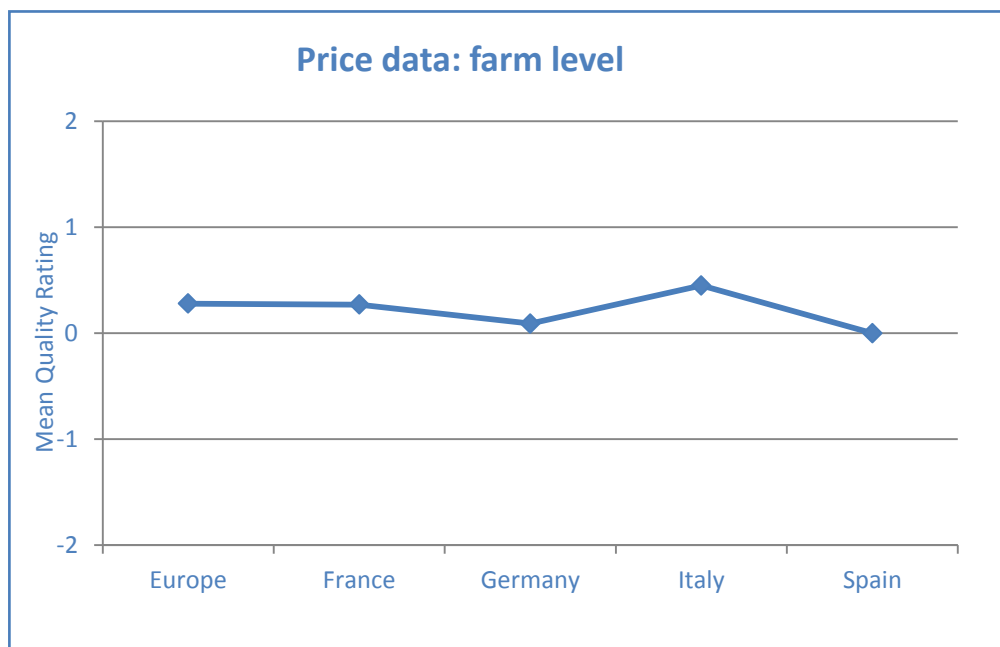


Figure 3: Mean overall quality rating for Organic price data at farm level (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.4 Organic production (volume and/or value) data at farm level

Organic production (volume and/or value) data at farm level is used by 145 (57%) of the respondents. It is available to 20 (8%) people who choose not to use it, and is not accessible to 23 (9%) respondents. 16 (6.3%) respondents report that this data type does not exist. Of the respondents who choose not to use this type of data, lack of relevance was the main quality criteria that influenced that decision (69%). By far the majority of respondents reported that, with the exception of relevance, the reasons supplied were not the main reason for not using that data type, which means that the data quality was not the reason that they choose not to use this data type. Of the respondents who indicated that they do not have access to this data type, 70 % indicated that they would use this data type either annually or monthly, and 75 % indicated that they felt at a disadvantage because of lack of access to this data. Of the people who do use organic production volume and/or value data at farm level, relevance again was the quality characteristic that received the most agreement (67%) followed by affordability (57%). The mean quality rating of the data was 2.36 (sd=0.85).

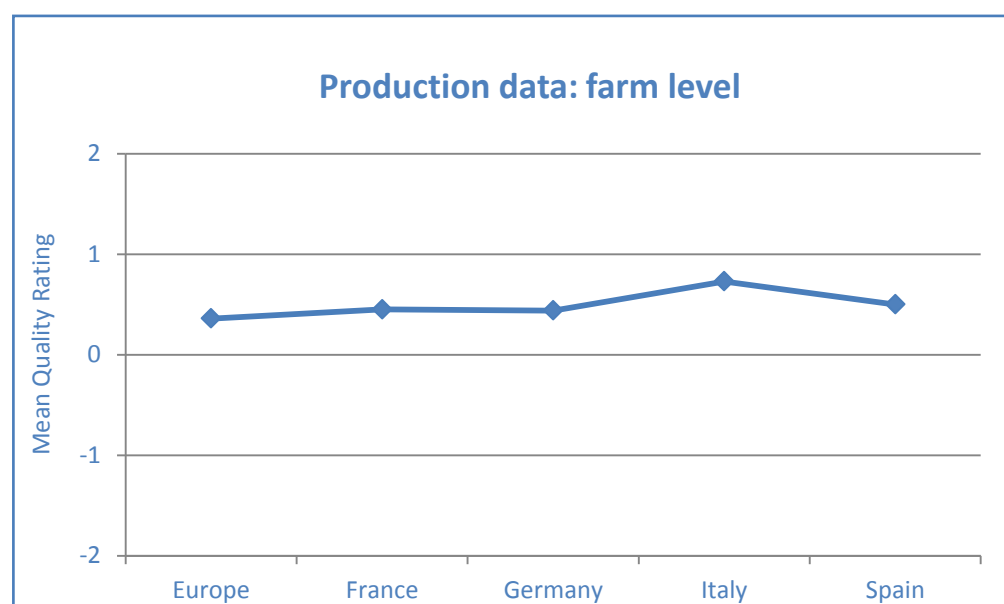


Figure 4: Mean overall quality rating for production (volume and/or value) data at farm level (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.6 Organic production volume data at wholesaler/processor level

Organic production volume data at wholesaler/processor level is used by 134 (52.5%) of the respondents. It is available to 15 (6%) people who choose not to use it, and is not accessible to 23 (9%) respondents. 25 (9.8%) respondents report that this data type does not exist. For the people who do not have access to the data, most (71%) would use it monthly or more frequently if it were available, and all feel that they are disadvantaged by lack of access to this data type. The quality of the data is a minor influence for those who choose not to use it when available, with lack of relevance the most common reason (40%). By far the majority of respondents reported that, with the exception of relevance, the reasons supplied were not the main reason for not using that data type, which indicates that relevance is a fundamental quality for data to be used. The users of organic production volume data at wholesaler/processor level report agreement that the available data is relevant (65%), with most disagreement that it is available as often as is needed (25%) and that it is accessible (20%) and up to date (17.4%). The quality rating for this data type was 2.31 (sd= 0.85).

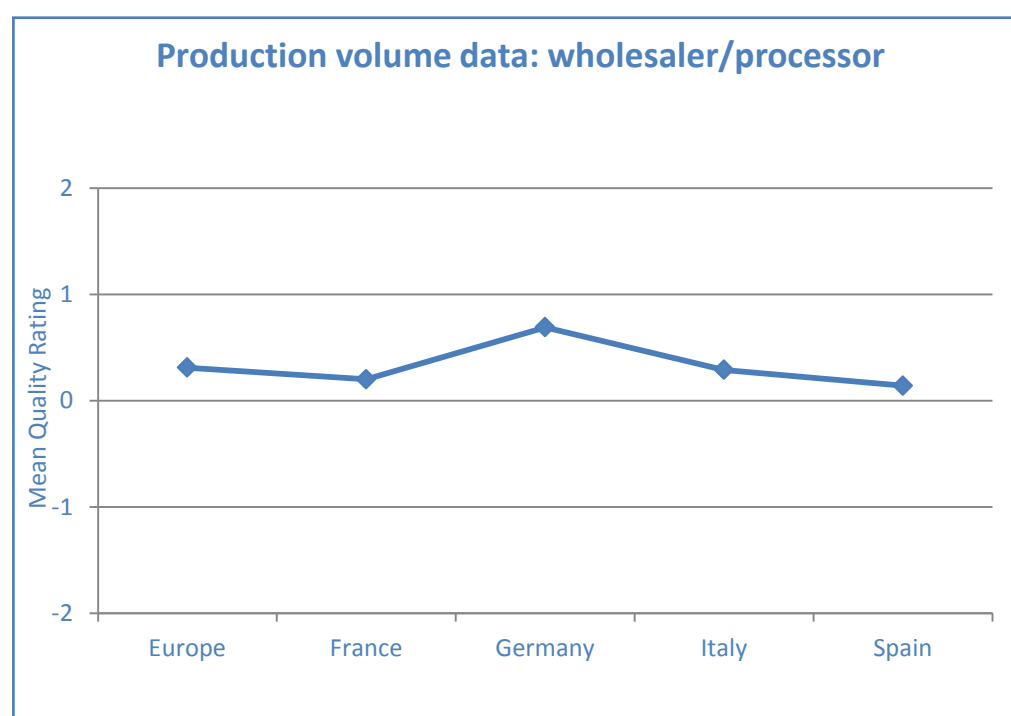


Figure 5: Mean overall quality rating for production volume data at wholesaler/processor level (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.8 Organic production value data at wholesaler/processor level

Organic production value data at wholesaler/processor level is used by 120 (47%) of the respondents. It is available to 18 (7.1%) people who choose not to use it, and is not accessible to 22 (8.6%) respondents. 30 (11.8%) respondents report that this data type does not exist. For the people who do not have access to the data, most (59%) would use it monthly or more frequently if it were available, and 93% feel that they are disadvantaged by lack of access to this data type. The quality of the data is a minor influence for those who choose not to use it when available, with lack of relevance the most common reason (45.5%). By far the majority of respondents reported that, with the exception of relevance, the reasons supplied were not the main reason for not using that data type, which indicates that relevance is a fundamental quality for data to be used. The users of organic production volume data at wholesaler/processor level report agreement that the available data is relevant (56%), with most disagreement that it is available as often as is needed (22%) and that it is accessible (17.9%) and up to date (12.8%). The quality rating for this data type was 2.31 (sd= 0.85).

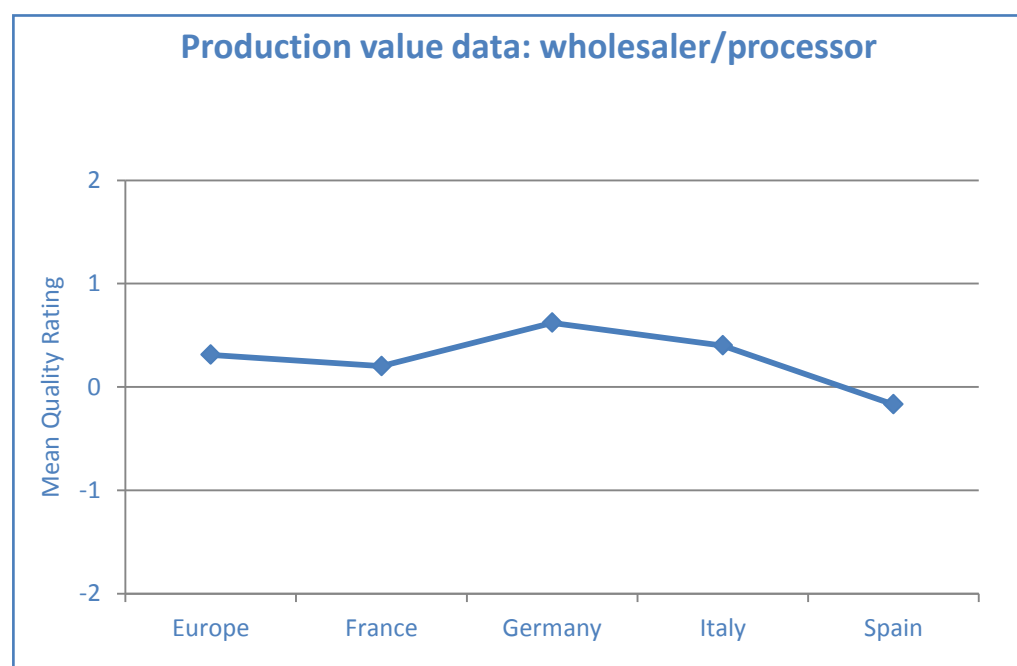


Figure 6: Mean overall quality rating for production value data at wholesaler/processor level (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.10 Organic price data at wholesaler/processor level

Organic price data at wholesaler/processor level is used by 133 (52%) of the respondents. It is available to 15 (5.9%) people who choose not to use it, and is not accessible to 23 (9%) respondents. 29 (11.4%) respondents report that this data type does not exist. For the people who do not have access to the data, most (65%) would use it monthly or more frequently if it were available, and 90% feel that they are disadvantaged by lack of access to this data type. The quality of the data is a minor influence for those who choose not to use it when available, with lack of relevance the most common reason (45.5%). By far the majority of respondents reported that, with the exception of relevance, the reasons supplied were not the main reason for not using that data type, which indicates that relevance is a fundamental quality for data to be used. The users of organic price data at wholesaler/processor level report agreement that the available data is relevant (60%), with most disagreement that it is available as often as is needed (24%) and that it is accessible (23.8%). The quality rating for this data type was 2.3 (sd= 0.78).

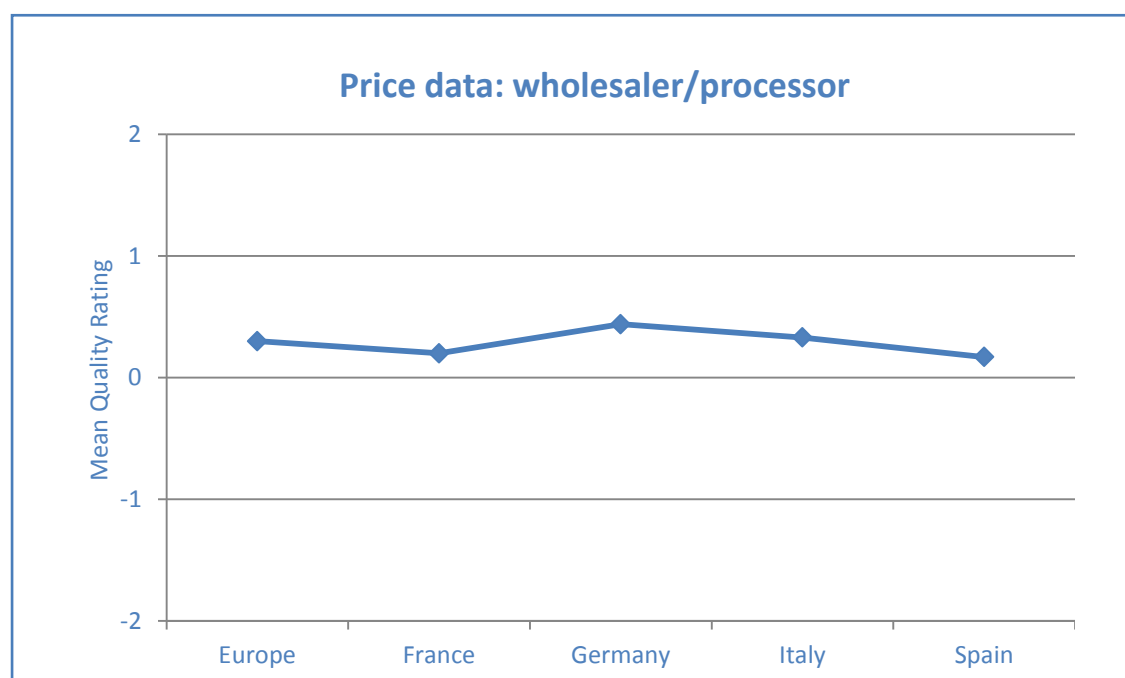


Figure 7: Mean overall quality rating for Organic price data at wholesaler/processor level (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.12 Data on organic import volumes

Data on organic import volumes is used by 120 (47%) of the respondents. It is available to 15 (5.9%) people who choose not to use it, and is not accessible to 29 (11.4%) respondents. 26 (10.2%) respondents report that this data type does not exist. For the people who do not have access to the data, most (61%) would use it monthly or more frequently if it were available, and 84% feel that they are disadvantaged by lack of access to this data type. The quality of the data is a minor influence for those who choose not to use it when available, with lack of relevance the most common reason (50%). By far the majority of respondents reported that, with the exception of relevance, the reasons supplied were not the main reason for not using that data type, which indicates that relevance is a fundamental quality for data to be used. The users of data on organic import volumes report agreement that the available data is relevant (59%), with most disagreement that it is available as often as is needed (23%) and that it is accessible (21.4%), up to date (17.1%) accurate (17.1%) and comparable (20%). The quality rating for this data type was 2.17 (sd= 0.89).

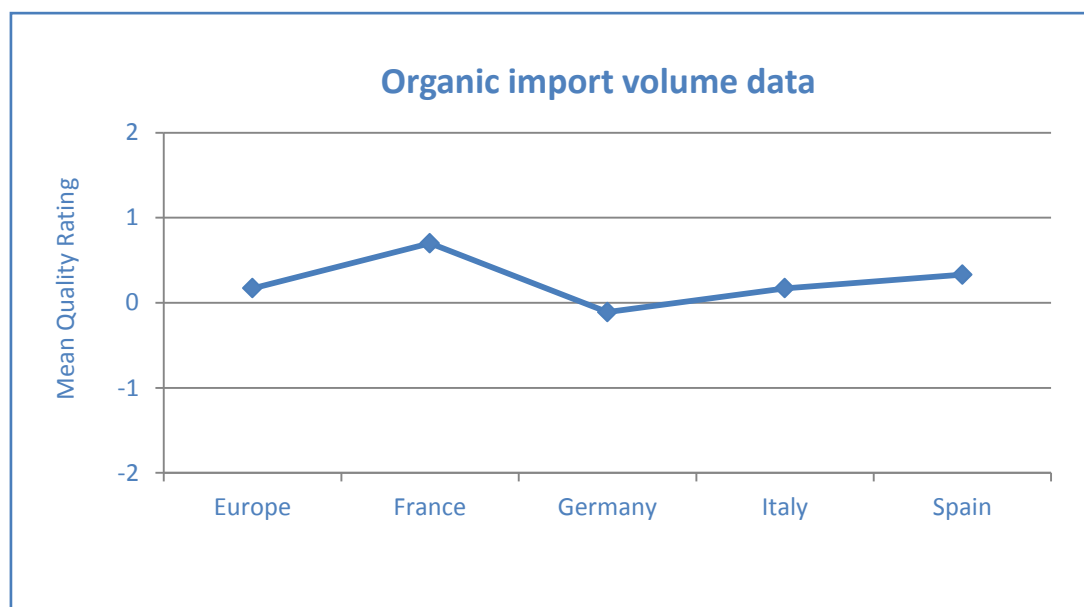


Figure 8: Mean overall quality rating for data on organic import volumes (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.13 Data on organic import values

Data on organic import values is used by 116 (45.5%) of the respondents. It is available to 17 (6.7%) people who choose not to use it, and is not accessible to 29 (11.4%) respondents. 27 (10.6%) respondents report that this data type does not exist. For the people who do not have access to the data, most (55%) would use it monthly or more frequently if it were available, and 88% feel that they are disadvantaged by lack of access to this data type. The quality of the data is a minor influence for those who choose not to use it when available, with lack of relevance the most common reason (40%). By far the majority of respondents reported that, with the exception of relevance, the reasons supplied were not the main reason for not using that data type, which indicates that relevance is a fundamental quality for data to be used. The users of data on organic import values report agreement that the available data is relevant (48%) and affordable (41%), with most disagreement that it is available as often as is needed (25.4%) and that it is accessible (25.4%) and up to date (20.6%). The quality rating for this data type was 2.12 (sd= 0.85).

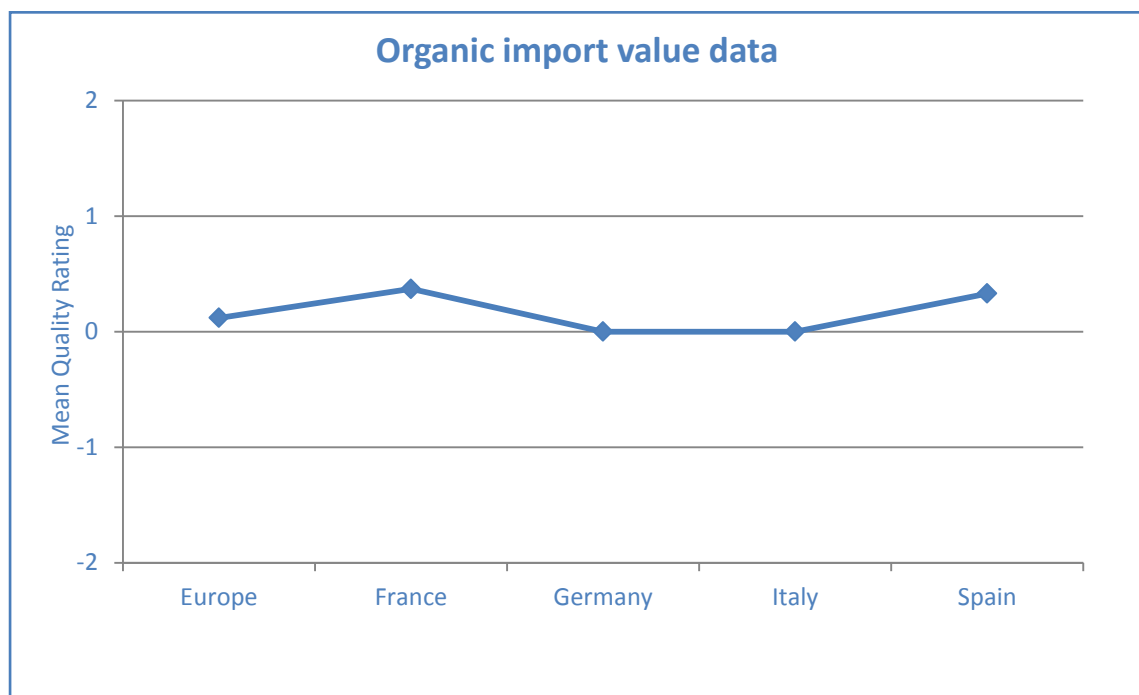


Figure 9: Mean overall quality rating for data on organic import values (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.14 Data on organic export volumes

Data on organic export volumes is used by 120 (47%) of the respondents. It is available to 16 (6.3%) people who choose not to use it, and is not accessible to 33 (12.9%) respondents. 30 (11.8%) respondents report that this data type does not exist. For the people who do not have access to the data, most (56%) would use it monthly or more frequently if it were available, and 87% feel that they are disadvantaged by lack of access to this data type. The quality of the data is a minor influence for those who choose not to use it when available, with lack of relevance the most common reason (62.5%). By far the majority of respondents reported that, with the exception of relevance, the reasons supplied were not the main reason for not using that data type, which indicates that relevance is a fundamental quality for data to be used. The users of data on organic export volumes indicated agreement that the available data is relevant (60%), with most disagreement that it is available as often as is needed (20.7%) and that it is accessible (27.6%) and up to date (17.2%). The quality rating for this data type was 2.29 (sd= 0.87).

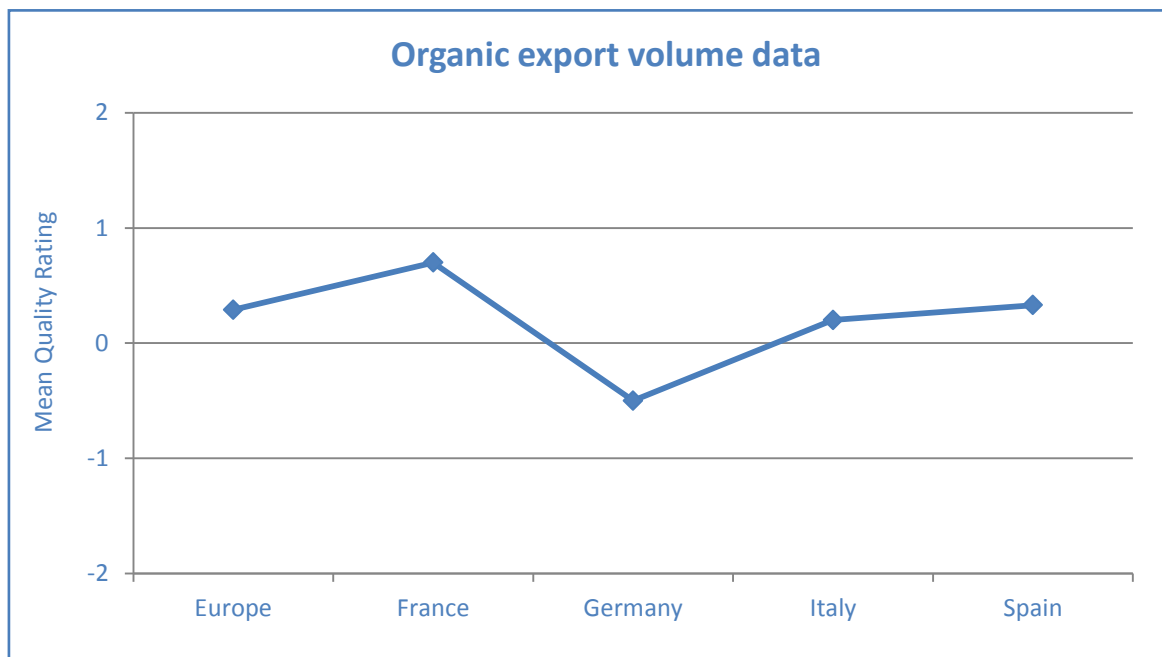


Figure 10: Mean overall quality rating for Data on organic export volumes (-2 = Low quality, 0 = Neutral, 2 = High quality)



### 3.2.16 Data on organic export values

Data on organic export values is used by 112 (44%) of the respondents. It is available to 17 (6.7%) people who choose not to use it, and is not accessible to 30 (11.8%) respondents. 27 (10.6%) respondents report that this data type does not exist. For the people who do not have access to the data, most (55%) would use it monthly or more frequently if it were available, and 83% feel that they are disadvantaged by lack of access to this data type. The quality of the data is a minor influence for those who choose not to use it when available, with lack of relevance the most common reason (44.4%). By far the majority of respondents reported that, with the exception of relevance, the reasons supplied were not the main reason for not using that data type, which indicates that relevance is a fundamental quality for data to be used. The users of data on organic export values report agreement that the available data is relevant (55%), with most disagreement that it is available as often as is needed (28.3%) and that it is accessible (26.7%) and up to date (20%). The quality rating for this data type was 2.12 (sd= 0.88).

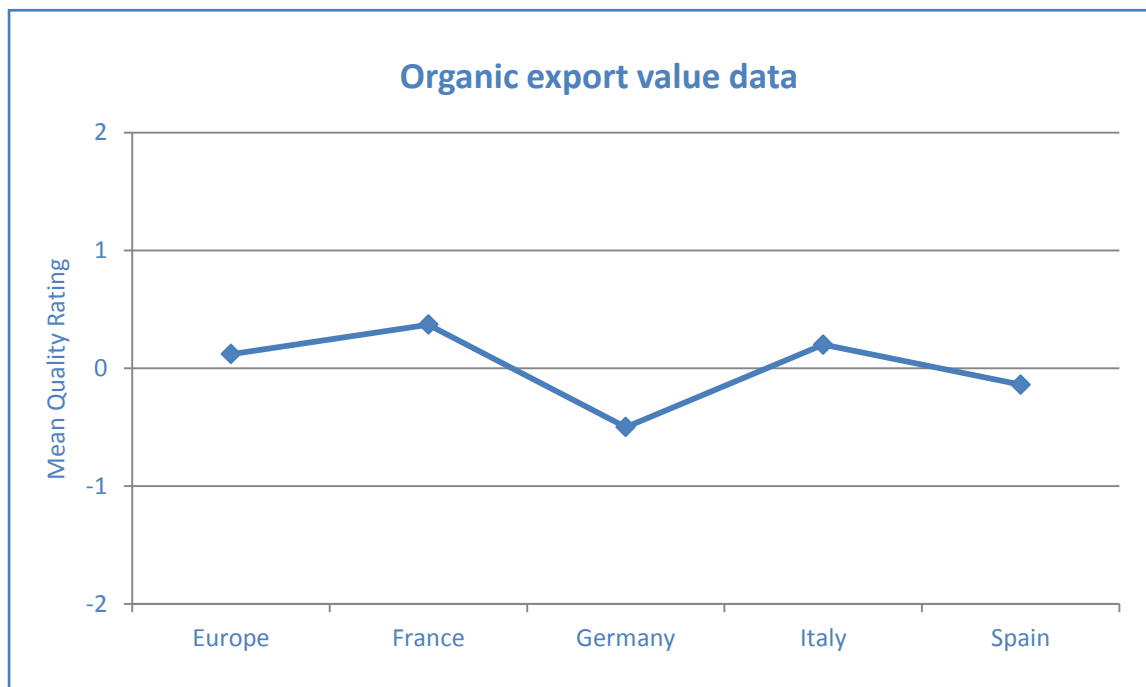


Figure 11: Mean overall quality rating for data on organic export values (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.17 Data on commercial/public organic procurement volumes

Data on commercial/public organic procurement volumes is used by 98 (38.6%) of the respondents. It is available to 18 (7.1%) people who choose not to use it, and is not accessible to 21 (8.3%) respondents. 34 (13.4%) respondents report that this data type does not exist. For the people who do not have access to the data, most (49%) would use it monthly or more frequently if it were available, and 81% feel that they are disadvantaged by lack of access to this data type. The quality of the data is a minor influence for those who choose not to use it when available, with lack of relevance the most common reason (30%). By far the majority of respondents reported that, with the exception of relevance, the reasons supplied were not the main reason for not using that data type, which indicates that relevance is a fundamental quality for data to be used. The users of data on commercial/public organic procurement volumes report agreement that the available data is relevant (50%), with most disagreement that it is available as often as is needed (29.7%) and that it is accessible (20.4%). The quality rating for this data type was 2.27 (sd= 0.85).

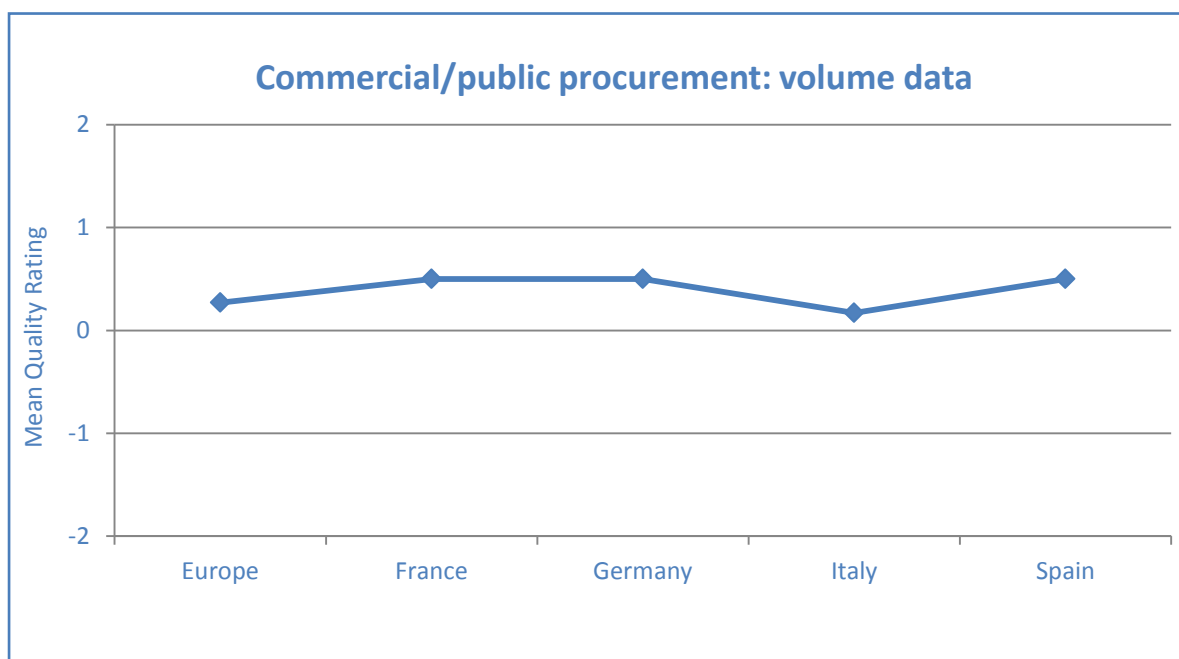


Figure 12: Mean overall quality rating for data on commercial/public organic procurement volumes (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.18 Data on commercial/public organic procurement prices

Data on commercial/public organic procurement prices is used by 93 (36.6%) of the respondents. It is available to 19 (7.5%) people who choose not to use it, and is not accessible to 24 (9.4%) respondents. 35 (13.8%) respondents report that this data type does not exist. For the people who do not have access to the data, most (54%) would use it monthly or more frequently if it were available, and 91% feel that they are disadvantaged by lack of access to this data type. The quality of the data is a minor influence for those who choose not to use it when available, with lack of relevance the most common reason (55%). By far the majority of respondents reported that, with the relevance was the only quality criteria supplied that was a reason for not using that data type, which indicates that relevance is a fundamental quality for data to be used. The users of data on commercial/public organic procurement prices report agreement that the available data is relevant (54%), with most disagreement that it is available as often as is needed (27.1%) and that it is accessible (23%). The quality rating for this data type was 2.23 (sd= 0.92).

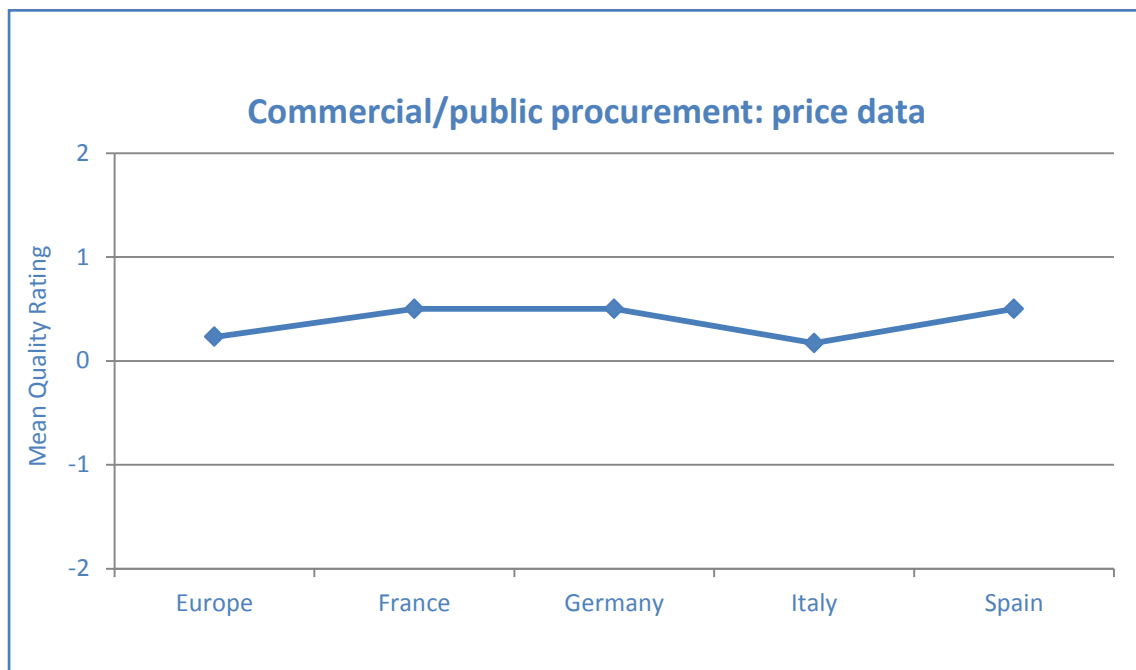


Figure 13: Mean overall quality rating for data on commercial/public organic procurement prices (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.19 Organic sales (volumes and/or values) data at retailer level

Organic sales (volumes and/or values) data at retailer level is used by 138 (54%) of the respondents. It is available to 15 (5.9%) people who choose not to use it, and is not accessible to 29 (11.4%) respondents. 15 (5.9%) respondents report that this data type does not exist. For the people who do not have access to the data, most (78%) would use it monthly or more frequently if it were available, and 97% feel that they are disadvantaged by lack of access to this data type. The quality of the data is an influence for those who choose not to use it when available, with lack of relevance, expense, frequency, timeliness and quality, the most common reasons (40%). It appears that the data quality is a significant reason that they choose not to use this data type. The users of organic sales (volume and/or value data at retailer level report agreement that the available data is relevant (63%), with most disagreement that it is available as often as is needed (28.4%) and that it is accessible (22.2%) and affordable (18.5%). The quality rating for this data type was 2.3 (sd= 0.78).

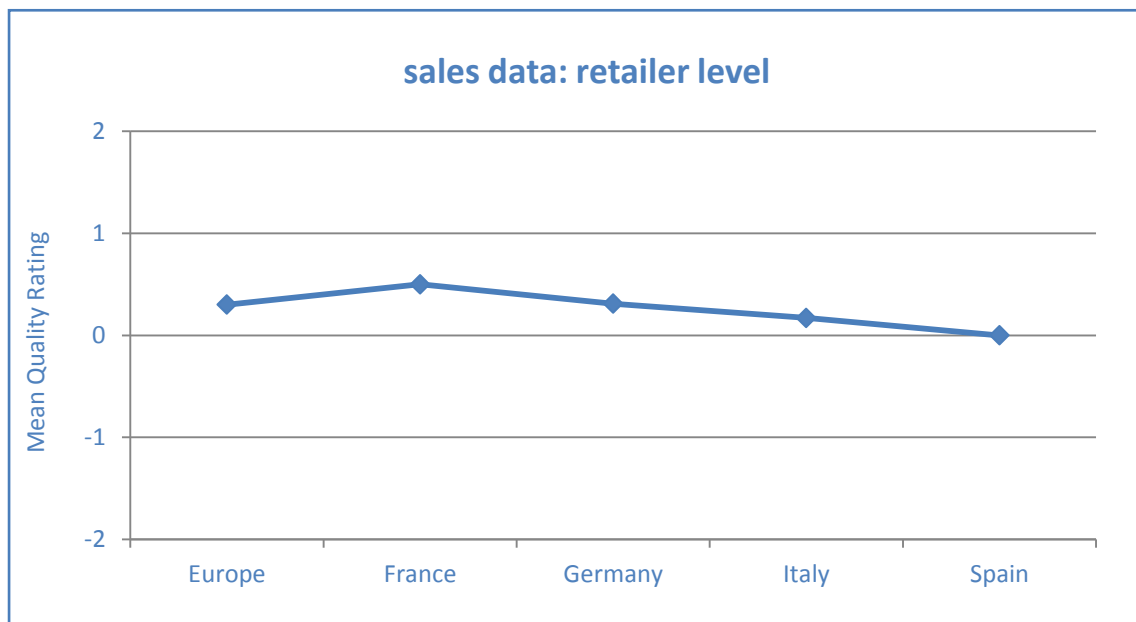


Figure 14: Mean overall quality rating for sales (volumes and/or values) data at retailer level (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.20 Household data (per capita organic food consumption or household expenditures)

Household data (per capita organic food consumption or household expenditures) is used by 133 (52%) of the respondents. It is available to 11 (4.3%) people who choose not to use it, and is not accessible to 23 (9%) respondents. 21 (8.2%) respondents report that this data type does not exist. For the people who do not have access to the data, most (51%) would use it monthly or more frequently if it were available, and 88% feel that they are disadvantaged by lack of access to this data type. The majority of respondents reported that, with the exception of relevance, the reasons supplied were not the main reason for not using that data type, which indicates that relevance is a fundamental quality for data to be used. The users of household data (per capita organic food consumption or household expenditures) report agreement that the available data is relevant (60%), with most disagreement that it is available as often as is needed (24.4%) and that it is accessible (26.8%). The quality rating for this data type was 2.25 (sd= 0.86). The quality of the data is a minor influence for those who choose not to use it when available, with lack of relevance the most common reason (33%).

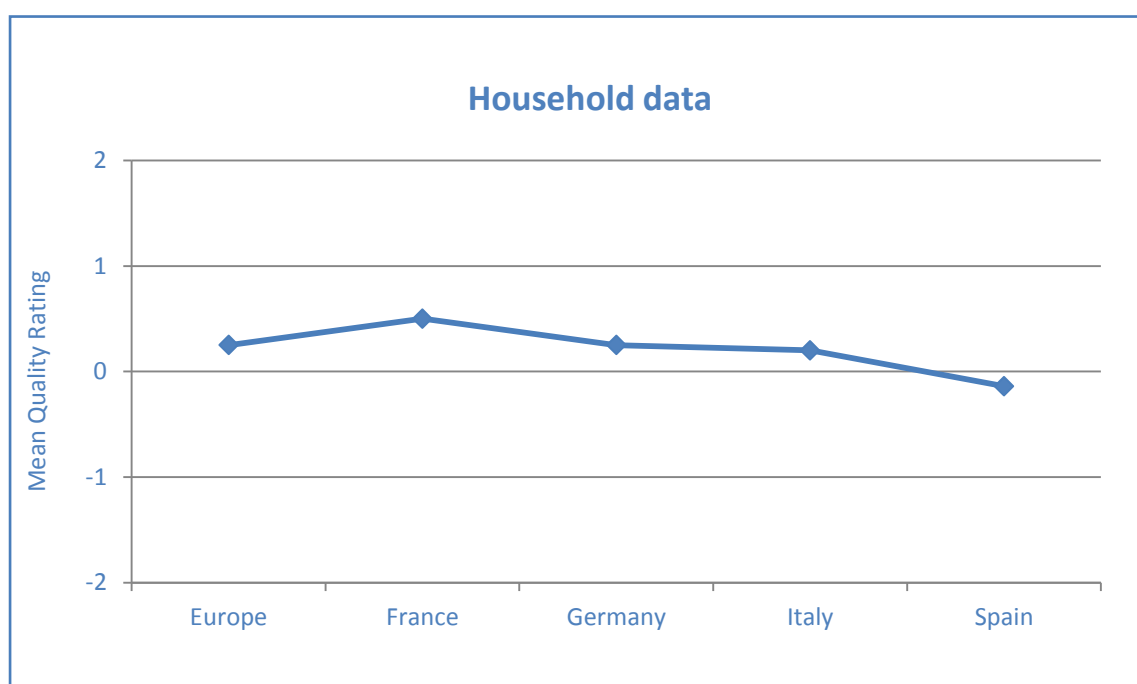


Figure 15: Mean overall quality rating for household data (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.21 Retail consumer price data for organic food

Retail consumer price data for organic food is used by 133 (52.4%) of the respondents. It is available to 12 (4.7%) people who choose not to use it, and is not accessible to 26 (10.2%) respondents. 20 (7.9%) respondents report that this data type does not exist. For the people who do not have access to the data, most (76%) would use it monthly or more frequently if it were available, and 94% feel that they are disadvantaged by lack of access to this data type. The majority of respondents reported that, with the exception of relevance, the reasons supplied were not the main reason for not using that data type, which indicates that relevance is a fundamental quality for data to be used. The users of retail consumer price data for organic food report agreement that the available data is relevant (60.5%), with most disagreement that it is available as often as is needed (25.9%) and that it is accessible (19.7%) and affordable (18.5%). The quality rating for this data type was 2.23 (sd= 0.86). The quality of the data is a minor influence for those who choose not to use it when available, with lack of relevance the most common reason (50%).

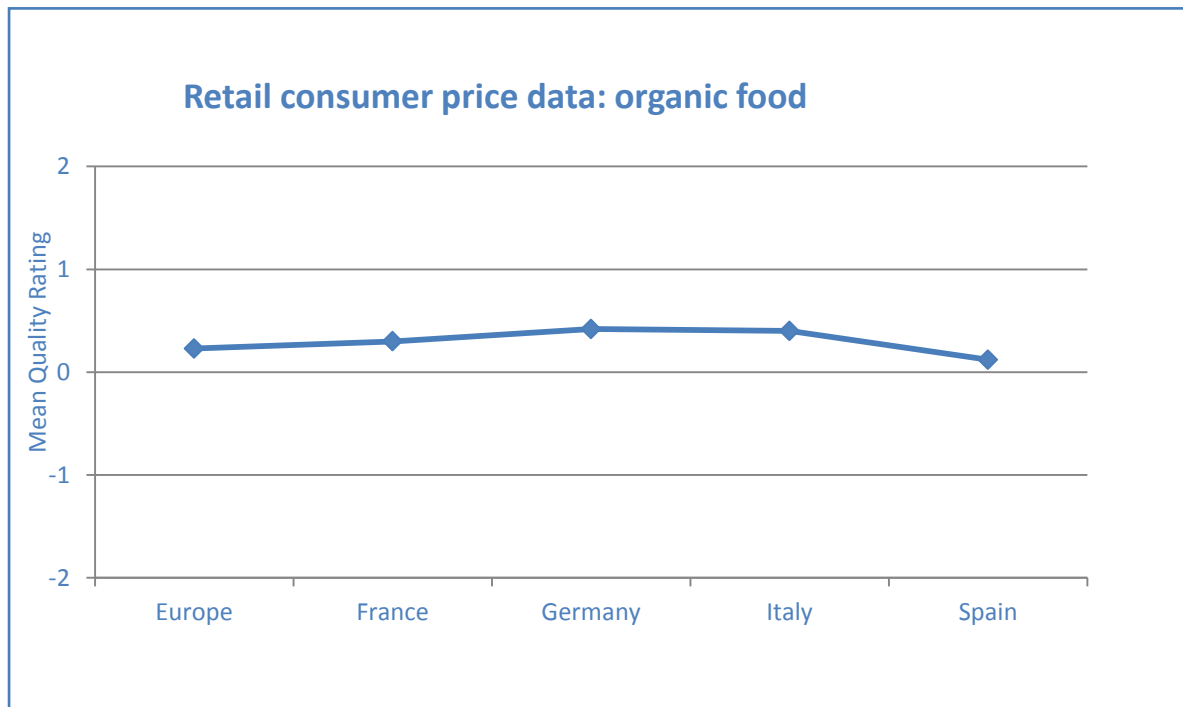


Figure 16: Mean overall quality rating for retail consumer price data for organic food (-2 = Low quality, 0 = Neutral, 2 = High quality)

### 3.2.22 Relationship between data use and knowledge of data existence

At the European level we have plotted the number of users of each data type and the number of people who report that the respective data type does not exist (Figure 17). As expected, the less people use the data type, the more people think the data don't exist. This result probably reflects the variability of data availability within Europe with data of a specific type available in one country but not in another. This issue will be explored in more depth in the country report sections on France and Germany (which provided sample sizes large enough to carry out a segmented analysis).

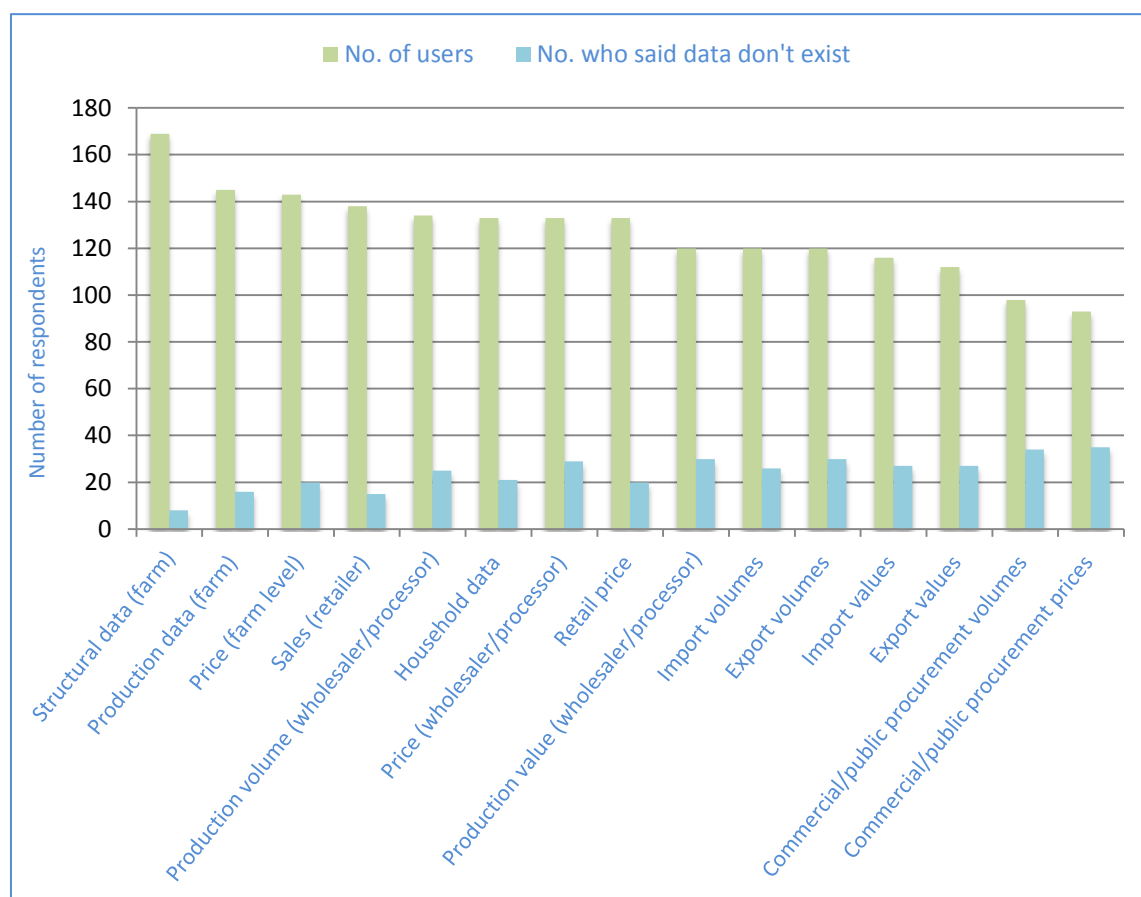


Figure 17: Number of users of each data type and number of respondents who reported that the respective data type does not exist

## 4 Reports on demand by individual country

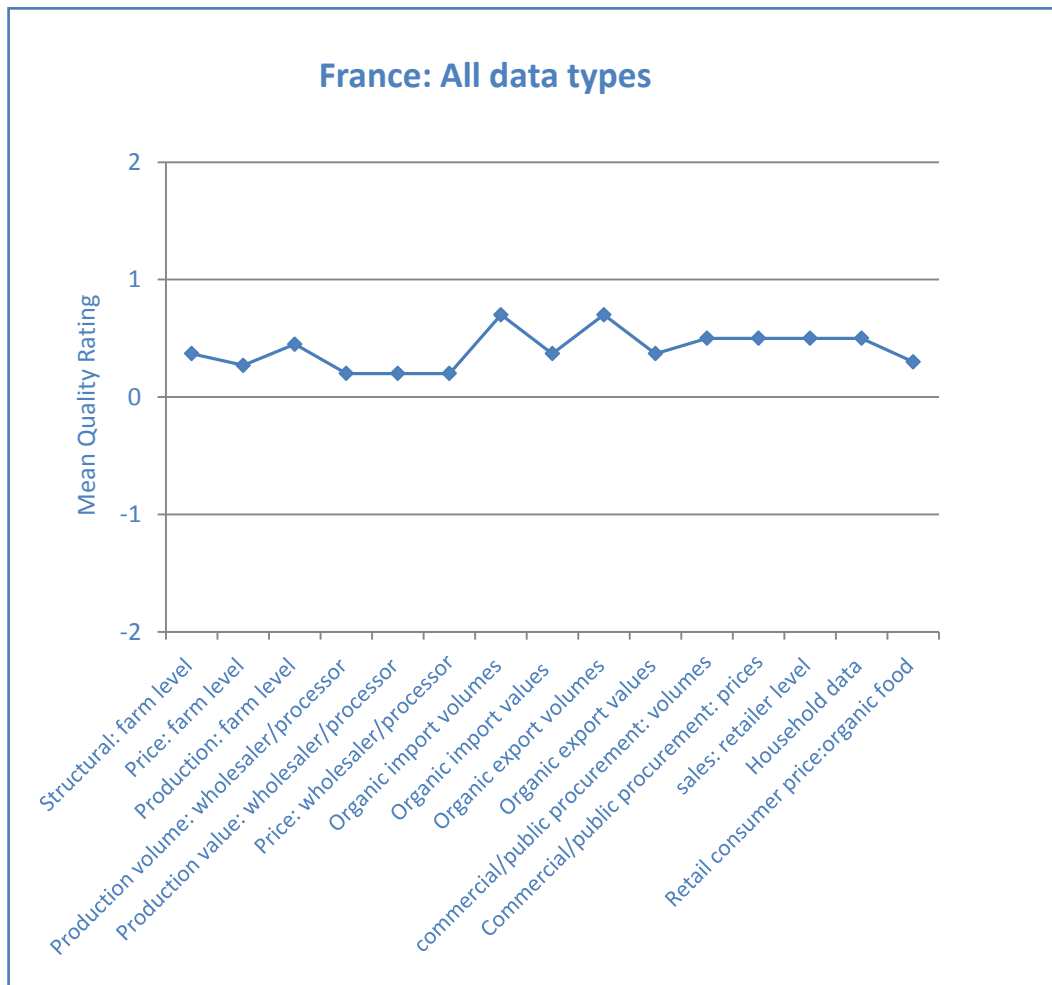
### 4.1 Country report: France

The range of respondents from France was quite broad and all of the data types were used. Organic production volume data at wholesaler/processor level, Organic production value data at wholesaler/processor level, and organic price data at wholesaler/processor level; Data on organic export and import volumes; and data on organic export and import values were treated identically so there appears little point in separating these data categories in the case of France.

There were 40 respondents from France from a broad range of organisations, including producers (25%), distributor of organic produce (20%), and producer representative organisation (20%), ranging from 1 to 1300 people. The respondents are primarily employed as executive/management (53%) sales (23%), public relations (18%), data processing (15%), buying (13%) and research (13%). The primary uses for French organic market data are for strategy/policy development (53%), decision support (48%), publication/dissemination (48%), forecasting (28%), and marketing strategy (25%). The most commonly used data is at national (56%) and regional level (51%).

Data relevance and affordability were the quality characteristics that were most commonly given for most data types by French data users for the data that they use. Exceptions to this trend were data on organic export and import volumes, for which accuracy and comparability were the quality characteristics of these data types, and data on commercial/public organic procurement volumes and prices, for which accessibility and availability were the most agreed characteristics. The French respondents disagreed most frequently that the data is available as often as needed for all data types, and that data is accessible, up to date, and accurate; depending on the data type. Please note that the data sources reported for each data type are transposed exactly as reported by respondents. Given the anonymity of the questionnaire, it was not possible to cross reference the existence of the nominated organisations, so it was decided to leave the reported data sources unedited.





**Figure 18: Mean quality rating for each data type by respondents from France (-2 = Low quality, 0 = Neutral, 2 = High quality)**

## France: Responses for specific data types

### 4.1.1 Structural data about organic agriculture at farm level

Structural data about organic agriculture at farm level is used by 25 (80.6%) of the respondents. It is available to 1 person who chooses not to use it, and is not accessible to one respondent. One respondent reports that this data type does not exist. For the two people who do not have access to the data, one would use it monthly if it were available, and both feel that they are disadvantaged by lack of access to this data type. The respondent who chooses not to use it when available gives lack of relevance and that it is usually out of date as the reasons. The users of structural data about organic agriculture at farm level report agreement that the available data is relevant (76%) and affordable (60%) with most disagreement that it is available as often as is needed (36%) and that it is accessible (32%). The quality rating for this data type was 2.37 (sd= 0.9).

Respondents reported sourcing data from:

- Conseil Generale;
- France government data and European community data on their web site, Organic forum through web group on linkedin;
- In our database, Biobase ([www.abiodoc.com](http://www.abiodoc.com)), coming from Agence Bio, Pole bio Massif Central, organic revues;
- Region of Poitou Charente;
- Different newspapers, organic monitor for example;
- Agence bio at national level. ORAB at regional level;
- Data from our own source in our région;
- FranceAgriMer, SSP, RNM; INTERNET;
- Own data at farm level but only for dairy, beef and sheep production. We need more data on other productions like fruits, goats;
- References produced by different advising agencies (chambers of agriculture, private advisors, technical institutes);
- Observatoire Corabio;
- Agence Bio ITAB INRA;
- Our own database thanks to interviews and the national Observatory of Organic productions in France;
- Data we collect in our district (organism is FRAB) and data from Agence Bio;
- Agence Bio thanks to the certification bodies and the notification of operators (L'agriculture biologique, chiffres clés")

### 4.1.2 Organic price data at farm level

Organic price data at farm level is used by 20 (64.5%) of the respondents. It is not accessible to two respondents. Four respondents report that this data type does not exist. For the six people who do not have access to the data, all would use it monthly or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. The users of organic price data at farm level report agreement that the available data is relevant (62%) and affordable (37.6%) with most disagreement that it is available as often as is needed (43.8 %) and that it is accessible (31.3%). The quality rating for this data type was 2.27 (sd= 0.96).

Respondents reported sourcing data from:

- Conseil Generale in our department;
- Local agencies of development who make surveys at farm level;
- Le petit meunier;
- From our survey in our region;
- The farmers themselves and/or from the organisations that buy the products;
- References;
- Agence bio, les chiffres clés;
- GAB;
- ITAB Agence Bio;
- We personally collect data.

#### 4.1.3 Organic production (volume or value data) at farm level

Organic production (volume or value data) at farm level is used by 18 (58%) of the respondents. It is available to two people who choose not to use it, and is not accessible to three respondents. Three respondents report that this data type does not exist. For the two people who do not have access to the data, three (50%) would use it monthly or more often if it were available, and five (83%) feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available did not supply reasons. The users of organic production (volume or value data) at farm level report agreement that the available data is affordable (70.4%), relevant (64.3%), easily accessible (64.3%) and available as often as needed (57.2%) with most disagreement that it is accurate (21.4%). The quality rating for this data type was 2.45 (sd= 0.99).

Respondents reported sourcing data from:

- Conseil Generale;
- France Agrimer statistics on production collected by coopératives and store grain companies;
- Agence bio + France Agrimer;
- Agence Bio;
- Observatoire Corabio;
- INRA;
- Data we collect and from Agence Bio;
- Agence Bio thanks to the certification bodies and the notification of operators („L'agriculture biologique, chiffres clés")

#### 4.1.4 Organic production volume data at wholesaler/processor level, Organic production value data at wholesaler/processor level, and organic price data at wholesaler/processor level

The results for these three data types were virtually identical. These data types are used by 18 (58%) of the respondents. It is not accessible to two (11%) of the respondents and four (22%) of the respondents report that this data type does not exist. For the people who do not have access to these data types, most would use them monthly if they were available, and all feel that they are disadvantaged by lack of access. The respondents who choose not to use these data types when available, give lack of relevance and that they are usually out of date as the reasons. The users of these data types report agreement that the available data is relevant (60%) and affordable (65%) with most disagreement that it is available as often as is needed (25%) and accurate 28%. The quality rating for these data types was 2.2 (sd= 0.49).

Respondents reported sourcing data from:

- From the wholesalers Europe-wide;
- France Agrimer;
- Agence Bio;
- Internet [www.agencebio.org](http://www.agencebio.org);
- Bioconvergence,
- INRA;
- Data on cereal, animal and milk collection is available from Agence Bio thanks to FranceAgriMer and interprofessional organisations („L'agriculture biologique, chiffres clés") various media sources;
- Partial data internet outlets;
- Weekly news paper *Depêche du Petit Meunier*;
- Agence bio ANDI;
- From our survey;
- Web sites;
- Partial data is available from SNM

#### **4.1.5 Data on organic export and import volumes.**

The results for these data types were virtually identical. Each is used by 13 (42%) of the respondents. It is available to three people who choose not to use it, and is not accessible to three respondents. Seven respondents report that these data types do not exist. Of the people who do not have access to these data types, most would use them annually if they were available, and all feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it did not offer reasons. The users of these data types report agreement that the available data is accurate (78%) and comparable (62.5%) with most disagreement that it is available as often as is needed (25%) and that it is accessible (25%). The quality rating for this data type was 2.7 (sd= 0.7).

Respondents reported sourcing data from:

- Internet;
- Market reviews in different magazines;
- Import/export statistics;
- France Agrimer;
- Internet [www.agencebio.org](http://www.agencebio.org);
- Agence Bio;
- Undefined: internet and suppliers;
- Customs;
- Various organic magazine and web groups;
- Export/import statistics.

#### **4.1.6 Data on organic export and import values.**

The results for these data types were virtually identical. Each is used by 16 (51.6%) of the respondents. It is available to three people who choose not to use it, and is not accessible to three respondents. Four respondents report that these data types do not exist. Of the people who do not have access to the data, most would use it annually if they were available, and all feel that they are disadvantaged by lack of access to these data types. The respondent who chooses not to use it when

available gives lack of relevance and that it is usually out of date as the reasons. The users of these data types report agreement that the available data is accessible (64%), affordable (64%), relevant (55%) and accurate (55%) with most disagreement that they are available as often as is needed (18%) and up to date (32%). The quality rating for this data type was 2.37 (sd= 0.9).

Respondents reported sourcing data from:

- Internet;
- Various magazine on organics products;
- Agence bio ANDI;
- Export/import statistics;
- Agence Bio;
- Internet [www.agencebio.org](http://www.agencebio.org); agence bio estimates;
- Agence Bio/ANDi („L'agriculture biologique, chiffres clés"): internet;
- customs;
- various magazines.

#### **4.1.7 Data on commercial/public organic procurement volumes and prices**

The results for these data types were virtually identical. Each is used by 12 (38.7%) of the respondents. It is available to two people who choose not to use it. Seven respondents (22.6%) report that these data types do not exist. For those who do not have access to these data types, most would use them monthly if they were available, and all feel that they are disadvantaged by lack of access to these data types. The respondents who choose not to use it did not offer reasons. The users of these data types report agreement that the available data is accessible (67%), affordable (60%) and available as often as needed (60%) with most disagreement that it is up to date (20%). The quality rating for this data type was 2.5 (sd= 0.8).

Respondents reported sourcing data from:

- Internet;
- Erai /cci/clusters/ubifrance;
- Only through my city authorities;
- AND panel and studies;
- Agence Bio;
- Internet [www.agencebio.org](http://www.agencebio.org);
- Different sources, national agencies;
- Several: internet;
- Different national agencies

#### **4.1.8 Data on organic sales (volumes and/or values) at retailer level**

Data on organic sales (volumes and/or values) at retailer level is used by 15 (48%) of the respondents. It is available to two people who choose not to use it, and is not accessible to three respondents. Five respondents report that this data type does not exist. For the people who do not have access to the data, most would use it monthly if it were available, and all feel that they are disadvantaged by lack of access to this data type. One of the respondents who choose not to use it when available gives lack of relevance as a minor reason. The users of data on organic sales (volumes and/or values) at retailer level report agreement that the available data is relevant (64%), available

as often as needed (64%) and affordable (64%) with most disagreement that it is up to date. The quality rating for this data type was 2.5 (sd= 0.8).

Respondents reported sourcing data from:

- Internet;
- Different and not direct;
- Agence Bio;
- Internet [www.agencebio.org](http://www.agencebio.org);
- Privates estimates;
- Agence Bio/ANDi („L'agriculture biologique, chiffres clés").

#### **4.1.9 Household data (per capita organic food consumption or household expenditures)**

Household data (per capita organic food consumption or household expenditures) is used by 19 (61.3%) of the respondents. It is available to one person who chooses not to use it, and is not accessible to two respondents. Two respondents report that this data type does not exist. For the four people who do not have access to the data, two would use it annually, one monthly and one weekly if it were available, and all four feel that they are disadvantaged by lack of access to this data type. The respondent who chooses not to use it when available gives lack of relevance as the reason. The users of household data (per capita organic food consumption or household expenditures) report agreement that the available data is affordable (85%), accessible (64.6%), relevant (58.3%), accurate (58.3%), and available as often as needed (58.3%). The quality rating for this data type was 2.5 (sd= 0.92).

Respondents reported sourcing data from:

- News;
- Observatoire économique Agence Bio;
- Agence bio baromètre CSA;
- Agence Bio;
- Internet [www.agencebio.org](http://www.agencebio.org);
- Private estimates;
- Agence Bio/ANDi and Agence Bio/CSA („L'agriculture biologique, chiffres clés")

#### **4.1.10 Data on retail consumer prices for organic food**

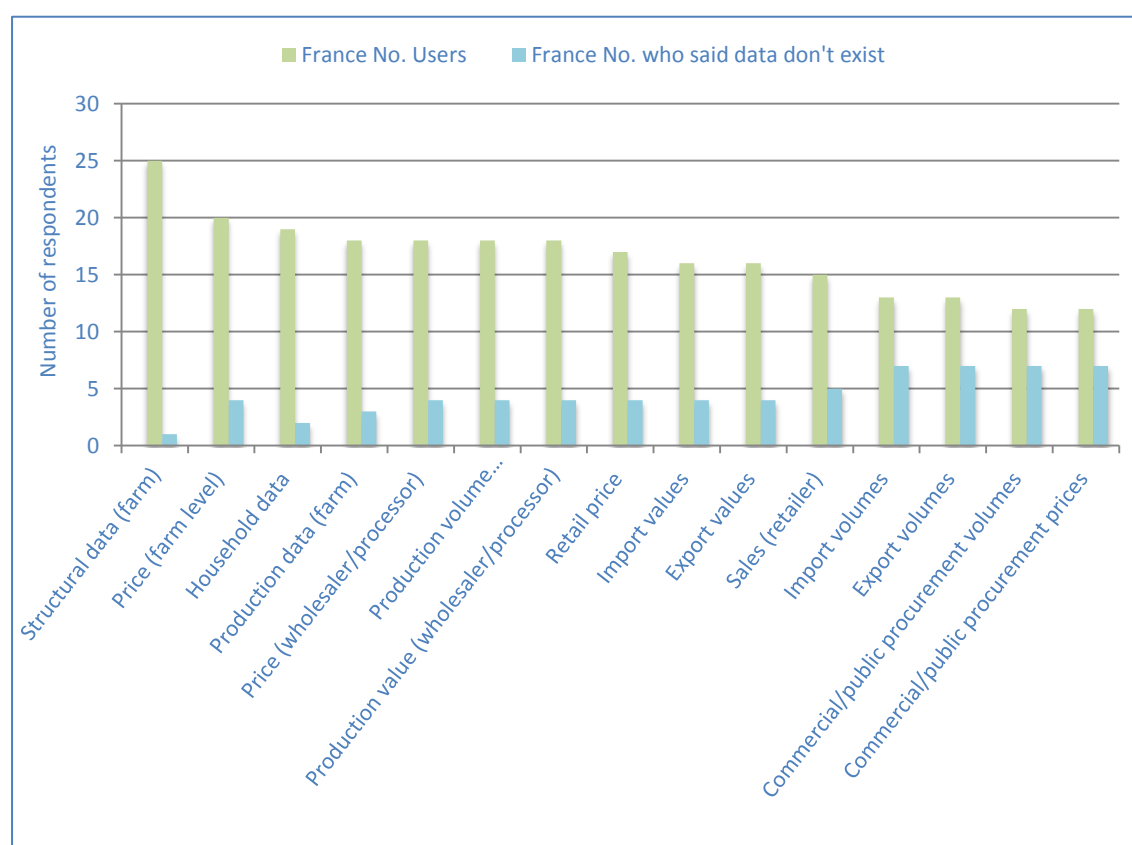
Data on retail consumer prices for organic food is used by 17 (54.8%) of the respondents. It is available to one person who chooses not to use it, and is not accessible to four respondents. Four respondents report that this data type does not exist. For the eight people who do not have access to the data, two would use it annually (40%) and two monthly (40%) if it were available, and all feel that they are disadvantaged by lack of access to this data type (three respondents did not answer this question). The respondent who chooses not to use it when available gives lack of relevance as the reason. The users of data on retail consumer prices for organic food report agreement that the available data is relevant (58.4%), accessible (50%) and affordable (50%) with most disagreement that it is up to date (16.7%). The quality rating for this data type was 2.3 (sd= 0.78).

Respondents reported sourcing data from:

- News;
- AND panel and studies;
- FranceAgriMer Service National des Marchés;
- Internet [www.agencebio.org](http://www.agencebio.org);
- private estimates;
- Data is partly available from SNM (<http://www.snm.franceagrimer.fr/cgi-bin/cgiaccueil>)

#### 4.1.11 Relationship between data use and knowledge of data existence

With the French responses, we have plotted the number of users of each data type and the number of people who report that the respective data type does not exist. As expected, the less people use the data type, the more people think the data don't exist. However some results are difficult to understand because respondents report using data, for example the data on prices at farm level, which do not exist. Some organic products prices exists but at a lesser extent that for conventional products. It is also possible that data user actually use conventional prices to approximate an organic price. That could be an explanation for such a use of prices at farm level.



**Figure 19: Number of users of each data type and number of respondents in France who reported that the respective data type does not exist**

## 4.2 Country report: Germany

The range of respondents from Germany was quite broad and all of the data types were used. Data on organic import volumes data on organic import values, data on organic export volumes and data on organic export values were all rated as being of particularly low quality in Germany. Respondents treated the two latter data types identically. Data on commercial/public organic procurement volumes and prices were treated similarly by respondents and were rated as being of relatively high quality in Germany.

There were 61 respondents from Germany from a broad range of organisations, including distributors of organic produce (33%), producers (23%), processors of organic products (18%) and suppliers of inputs for organic producers and/or processors (16%), ranging from one to 3000 people. The respondents are primarily employed as executive/management (49%), sales (23%), marketing (21%), and research (20%). The primary uses for German organic market data are for marketing strategy (49%), decision support (44%), research (34%), strategy/policy development (31%), and publication/dissemination (28%). The most commonly used data is at national (80%) and regional level (37.3%).

Please note that the data sources reported for each data type are transposed exactly as reported by respondents. Given the anonymity of the questionnaire, it was not possible to cross reference the existence of the nominated organisations, so it was decided to leave the reported data sources unedited.

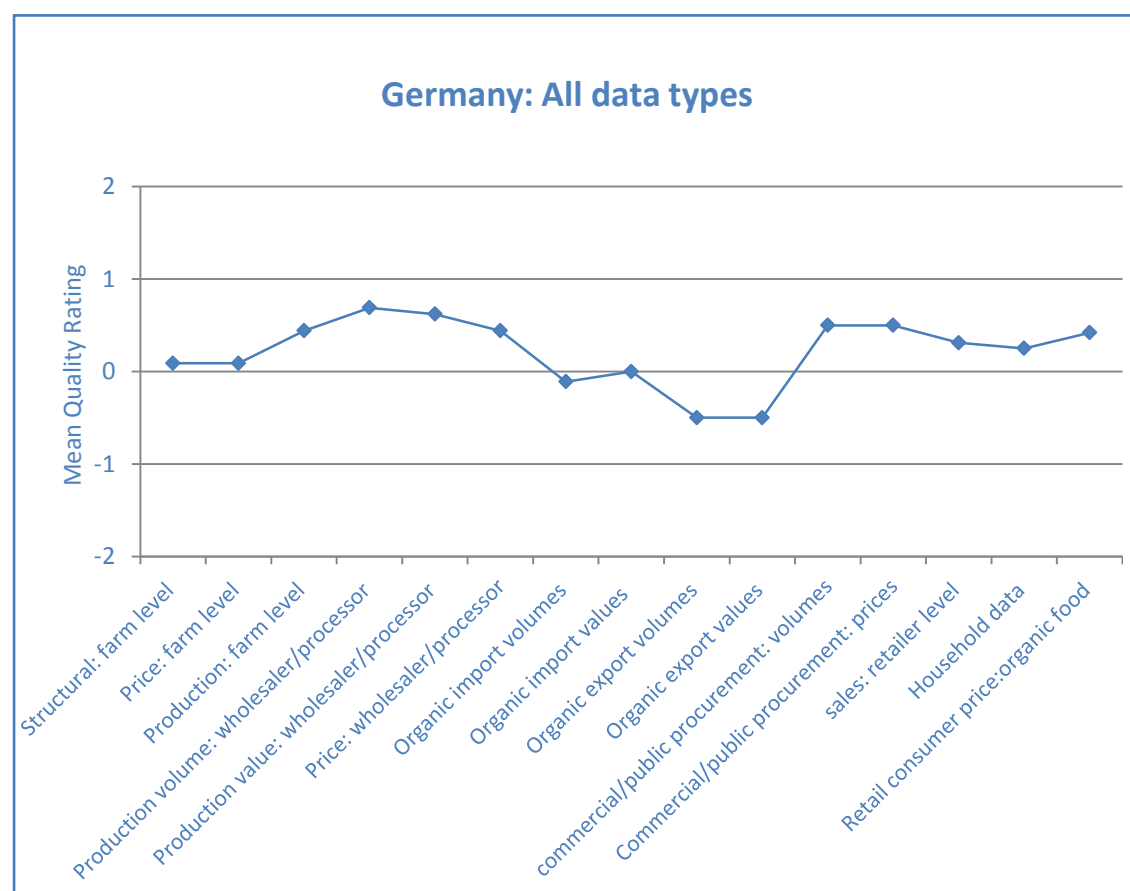


Figure 20: Mean quality rating for each data type by respondents from Germany (-2 = Low quality, 0 = Neutral, 2 = High quality)



## Germany: Responses for specific data types

### 4.2.1 Structural data about organic agriculture at farm level

Structural data about organic agriculture at farm level is used by 35 (73%) of the respondents. It is available to two people who choose not to use it, and is not accessible to two respondents. Three respondents report that this data type does not exist. For the five people who do not have access to the data, one would use it monthly if it were available, and feels that they are disadvantaged by lack of access to this data type (three did not respond to the question). The other respondent does not feel disadvantaged and would not use this data type if it were available. The respondents who choose not to use it when available gave lack of relevance and that it is usually out of date as the reasons. The users of structural data about organic agriculture at farm level report agreement that the available data is relevant (66%), is available as often as is needed (43.7%) and is up to date (40.7) with most disagreement that it is comparable with other data (31.2%) and accessible (28.2). The quality rating for this data type was 2.09 (sd= 0.67).

Respondents reported sourcing data from:

- Nielsen;
- Agrarbericht BMELV;
- BLE, AMI Structural data;
- BÖLW ZDF 2012, Internet, Organic Associations;
- BÖLW - Bund Ökologische Lebensmittelwirtschaft;
- World of Organic Agriculture (FiBL);
- AMI;
- IFOAM and Bio-Markt;
- Fachmagazine;
- BÖLW, AMI;
- Willer et al data (FiBL et al) Structure of organic market;
- University;
- Organic associations in Germany;
- ZPM so long, as it existed;
- AMI Jahrbuch Statistical Office Germany;
- Agrarberichte verschiedenen Ursprungs (Bund, Land, alternativer Agrarbericht) EkoConnect.

### 4.2.2 Organic price data at farm level

Organic price data at farm level is used by 28 (58%) of the respondents. It is available to three people who choose not to use it, and is not accessible to four respondents. Three respondents report that this data type does not exist. For the seven people who do not have access to the data, three would use it monthly if it were available, and feel that they are disadvantaged by lack of access to this data type. The remaining three respondents do not feel disadvantaged and would not use this data type if it were available (one did not respond to the question). The respondents who choose not to use it when available gave lack of relevance and that it is usually out of date as the reasons. The users of organic price data at farm level report agreement that the available data is relevant (66%), is available as often as is needed (43.7%) and is up to date (40.7) with most disagreement that it that it

is comparable with other data (31.2%) and accessible (28.2). The quality rating for this data type was 2.09 (sd= 0.67).

Respondents reported sourcing data from:

- Private research and experience, AMI-Marktwoche;
- We use mainly the contact to the farmers;
- AMI;
- BÖLW;
- World of Agriculture;
- IFOAM and Bio-Markt;
- Milch-marketing, muva-kempten;
- Green Trade Net;
- ZPM;
- Suppliers;
- Farm Accountancy Data Network Germany.

#### **4.2.3 Organic production (volume and/or value) data at farm level**

Organic production (volume and/or value) data at farm level is used by 31 (65%) of the respondents. It is available to three people who choose not to use it, and is not accessible to two respondents. Two respondents report that this data type does not exist. For the four people who do not have access to the data, half would use it annually if it were available, and feel that they are disadvantaged by lack of access to this data type. The remaining two respondents do not feel disadvantaged and would not use this data type if it were available. The respondents who choose not to use it when available give lack of relevance as the reason. The users of organic production (volume and/or value) data at farm level agree that the available data is relevant (86.3%), is available as often as is needed (50%), is affordable (50%), is accurate (50%), and is up to date (50%) with most disagreement that it that it is comparable with other data (22.7%) and accessible (27.2%). The quality rating for this data type was 2.44 (sd= 0.9).

Respondents reported sourcing data from:

- Nielsen, gfk;
- Private research and experience;
- AMI;
- Data is needed by purchase;
- BÖLW ZDF 2012, Internet, Organic Associations;
- BÖLW;
- World of Organic Agriculture;
- Own data;
- BMELV;
- Personal contacts Organic farmers associations
- ZPM so long as it existed
- Suppliers;
- AMI EkoConnect FiBL.

#### 4.2.4 Organic production volume data at wholesaler/processor level

Organic production volume data at wholesaler/processor level is used by 24 (50%) of the respondents. It is available to three people who choose not to use it, and is not accessible to two respondents. Five respondents report that this data type does not exist. For the seven people who do not have access to the data, four responded to the question of how often they would use it if it were available: two would use it monthly if it were available, and all four feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available give lack of relevance, lack of affordability, and lack of comparability as the reasons. The users of organic production volume data at wholesaler/processor level report agreement that the available data is relevant (74.9%), is accessible (68.8%), affordable (68.8%) and is up to date (68.8%) with most disagreement that it is available as often as needed (18.8%). The quality rating for this data type was 2.69 (sd= 0.82).

Respondents reported sourcing data from:

- Gfk, Nielsen and others;
- BNN;
- Own data;
- BioHandel;
- Competitor analysis;
- Suppliers;
- Biovista;
- EkoConnect AMI.

#### 4.2.5 Organic production value data at wholesaler/processor level

Organic production value data at wholesaler/processor level is used by 22 (46%) of the respondents. It is available to two people who choose not to use it, and is not accessible to two respondents. Five respondents report that this data type does not exist. For the seven people who do not have access to the data, five would use it annually or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available gave lack of relevance as the reason. The users of organic production value data at wholesaler/processor level report agreement that the available data is relevant (73.4%), is up to date (73.4%), is accessible (60%), affordable (60%) and accurate (60%) with most disagreement that it is affordable (20%) and comparable (20%). The quality rating for this data type was 2.62 (sd= 0.74).

Respondents reported sourcing data from:

- BNN;
- AMI;
- Own data;
- BioHandel, BioVista;
- Suppliers;
- Biovista;
- AMI EkoConnect FIBL.

#### 4.2.6 Organic price data at wholesaler/processor level

Organic price data at wholesaler/processor level is used by 31 (65%) of the respondents. It is available to one person who chooses not to use it, and is not accessible to one respondent. Five respondents report that this data type does not exist. For the six people who do not have access to the data, five would use it annually or more often if it were available, and all five feel that they are disadvantaged by lack of access to this data type (one respondent did not answer this question). The users of organic price data at wholesaler/processor level report agreement that the available data is relevant (80.9%), is available as often as needed (61.9%), up to date (57.1%), and comparable (57.1%) with most disagreement that it is available as often as needed (29%), accessible (23.8%), and comparable (23.8%). The quality rating for this data type was 2.44 (sd= 0.61). This result shows that some users of organic price data at wholesaler/processor level find the data to be comparable, while others disagree that it is comparable.

Respondents reported sourcing data from:

- AMI;
- AMI MARKTWoche;
- We source it directly from wholesaler;
- AMI;
- BÖLW
- World of Organic Agriculture;
- Ami ;
- BioVista, BioHAndel, wholesalers data;
- Competitor analysis;
- Suppliers;
- BNN.

#### 4.2.7 Data on organic import volumes

Data on organic import volumes is used by 20 (42%) of the respondents. It is available to three people who choose not to use it, and is not accessible to five respondents. Five respondents report that this data type does not exist. For the 10 people who do not have access to the data, all would use it annually or more often if it were available, and seven feel that they are disadvantaged by lack of access to this data type. One respondent who chooses not to use it when available gave lack of relevance as the reason, while the others offered no reason. The users of data on organic import volumes report agreement that the available data is relevant (54.6%) with strong disagreement on all the other quality criteria. Not surprisingly, the data type scored poorly on overall quality with the quality rating for this data type as 1.89 (sd= 0.87).

Respondents reported sourcing data from:

- AMI, GFK, Nielsen and others;
- Private research and experience;
- AMI/FiBl;
- Publications like Organic Monitor, surveys;
- BÖLW-Publication „Zahlen und Fakten“;
- Own collection system;
- AMI EkoConnect reports.

#### **4.2.8 Data on organic import values**

Data on organic import values is used by 17 (35%) of the respondents. It is available to three people who choose not to use it, and is not accessible to five respondents. Seven respondents report that this data type does not exist. For the 12 people who do not have access to the data, all would use it annually or more often if it were available, and nine feel that they are disadvantaged by lack of access to this data type. One respondent who chooses not to use it when available gave lack of relevance as the reason, while the others offered no reason. The users of data on organic import values report agreement that the available data is relevant (50%) with strong disagreement on all the other quality criteria except for accuracy. Not surprisingly, the data type scored poorly on overall quality with the quality rating for this data type as 2 (sd= 0.63).

Respondents reported sourcing data from:

- AMI, Nielsen, GFK;
- We have data from own collection sources;
- AMI Fibl EkoConnect.

#### **4.2.9 Data on organic export volumes and data on organic export values**

Respondents treated these two data types identically. Data on organic export volumes is used by 12 (25%) of the respondents. It is available to three people who choose not to use it, and is not accessible to eight respondents. Seven respondents report that this data type does not exist. For the 15 people who do not have access to the data, all would use it annually or more often if it were available, and eight feel that they are disadvantaged by lack of access to this data type. One respondent who chooses not to use it when available gave lack of relevance as the reason, while the others offered no reason. The users of data on organic export volumes report strong disagreement on all the quality criteria: in particular the affordability (60%) up to date (60%) and accessibility (60%). Not surprisingly, the data type scored poorly on overall quality with the quality rating for this data type as 1.5 (sd= 0.5).

Respondents reported sourcing data from:

- AMI, GFK, Nielsen and others.

#### **4.2.10 Data on commercial/public organic procurement volumes and prices**

Respondents treated these two data types nearly identically. Data on commercial/public organic procurement volumes and prices is used by 13 (27%) of the respondents. It is available to six people who choose not to use it, and is not accessible to five respondents. Five respondents report that this data type does not exist. For the 10 people who do not have access to the data, all would use it annually or more often if it were available, and seven feel that they are disadvantaged by lack of access to this data type. Two respondents who choose not to use these data types when available gave lack of relevance as the reason, while the others offered no reason. The users of data on commercial/public organic procurement volumes report agreement that the available data is relevant (67%) with the most disagreement that the data is affordable (33%) and available as often as needed (33%). The data type scored well on overall quality with the quality rating for this data

type as 2.5 (sd= 0.5). The users of data on commercial/public organic procurement prices report agreement with all of the data quality criteria and the data type scored well on overall quality with the quality rating for this data type as 2.5 (sd= 0.5).

Respondents reported sourcing data from:

- ContRate, Klaus Braun, Biovista;
- Publications like Organic Monitor, Interviews with experts and stakeholders;
- Ökomonitor;
- I get the data directly from distribution sources;
- Competitor analysis;
- Internet.

#### **4.2.11 Organic sales (volumes and/or values) data at retailer level**

Respondents treated these two data types nearly identically. Organic sales (volumes and/or values) data at retailer level is used by 24 (50%) of the respondents. It is available to two people who choose not to use it, and is not accessible to four respondents. Two respondents report that this data type does not exist. For the six people who do not have access to the data, all would use it monthly or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. One of the two respondents who choose not to use this data type when available gave lack of relevance, infrequency and expense as the reasons, while the other offered no reason. The users of organic sales (volumes and/or values) data at retailer level report agreement that the available data is relevant (81.3%) with the most disagreement that the data is affordable (18.8%) and accessible (18.8%). The quality rating for this data type was 2.31 (sd= 0.46).

Respondents reported sourcing data from:

- BNN, Biovista;
- GfK, Nielsen, BioVista;
- Interviews with retailers;
- Source: BÖLW „Zahlen und Fakten“;
- FibL World of Organic Agriculture. Data is good enough for me for Germany, but for EU and global scale there are deficits;
- Own data;
- Partners;
- Business publications, Own research;
- Diverse publications;
- AMI on basis of GfK panel data, sometimes AC Nielsen data;
- BNN.

#### **4.2.12 Household data (per capita organic food consumption or household expenditures)**

Household data (per capita organic food consumption or household expenditures) is used by 27 (56%) of the respondents. It is available to one person who chooses not to use it, and is not accessible to four respondents. Two respondents report that this data type does not exist. For the six people who do not have access to the data, five would use it monthly or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. The two respondents who choose not to use this data type when available gave affordability and lack of

quality as the reasons. The users of household data (per capita organic food consumption or household expenditures) report agreement that the available data is relevant (75.1%) with the most disagreement that the data is affordable (43.8%), available as often as needed (37.6) and accessible (37.6%). The quality rating for this data type was 2.25 (sd= 0.83).

Respondents reported sourcing data from:

- literature;
- GfK (Gesellschaft für Konsumforschung) Household Scan;
- Source: BÖLW „Zahlen und Fakten“;
- FibL World of Organic Agriculture;
- AMI, SÖL;
- Magazines, Publications, Diverse publications;
- AMI, on basis GfK panel data and AC Nilsen;
- Marketing institutes;
- FibL EkoConnect AMI.

#### **4.2.13 Retail consumer price data for organic food**

Retail consumer price data for organic food is used by 24 (50%) of the respondents. It is not accessible to five respondents. Three respondents report that this data type does not exist. For the eight people who do not have access to the data, all would use it monthly or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. The users of retail consumer price data for organic food report agreement that the available data is relevant (58.8%) with the most disagreement that the data is affordable (35.3%), available as often as needed (29.4%) and accessible (29.4%). The quality rating for this data type was 2.42 (sd= 0.86).

Respondents reported sourcing data from:

- Literature, webpages;
- AMI;
- Survey in retail shops;
- Source: BÖLW „Zahlen und Fakten“,
- FibL World of Organic Agriculture;
- Own data;
- GfK;
- Price list;
- Markt researches;
- Diverse publications;
- AMI, on basis of GfK panel data and AC Nielsen;
- Retailers;
- EkoConnect Fibl.

#### 4.2.14 Relationship between data use and knowledge of data existence

With the German responses, we have plotted the number of users of each data type and the number of people who report that the respective data type does not exist. As expected, the less people use the data type, the more people think the data don't exist. However some results are difficult to understand because respondents report using data, for example the export value and volume data, which do not exist.

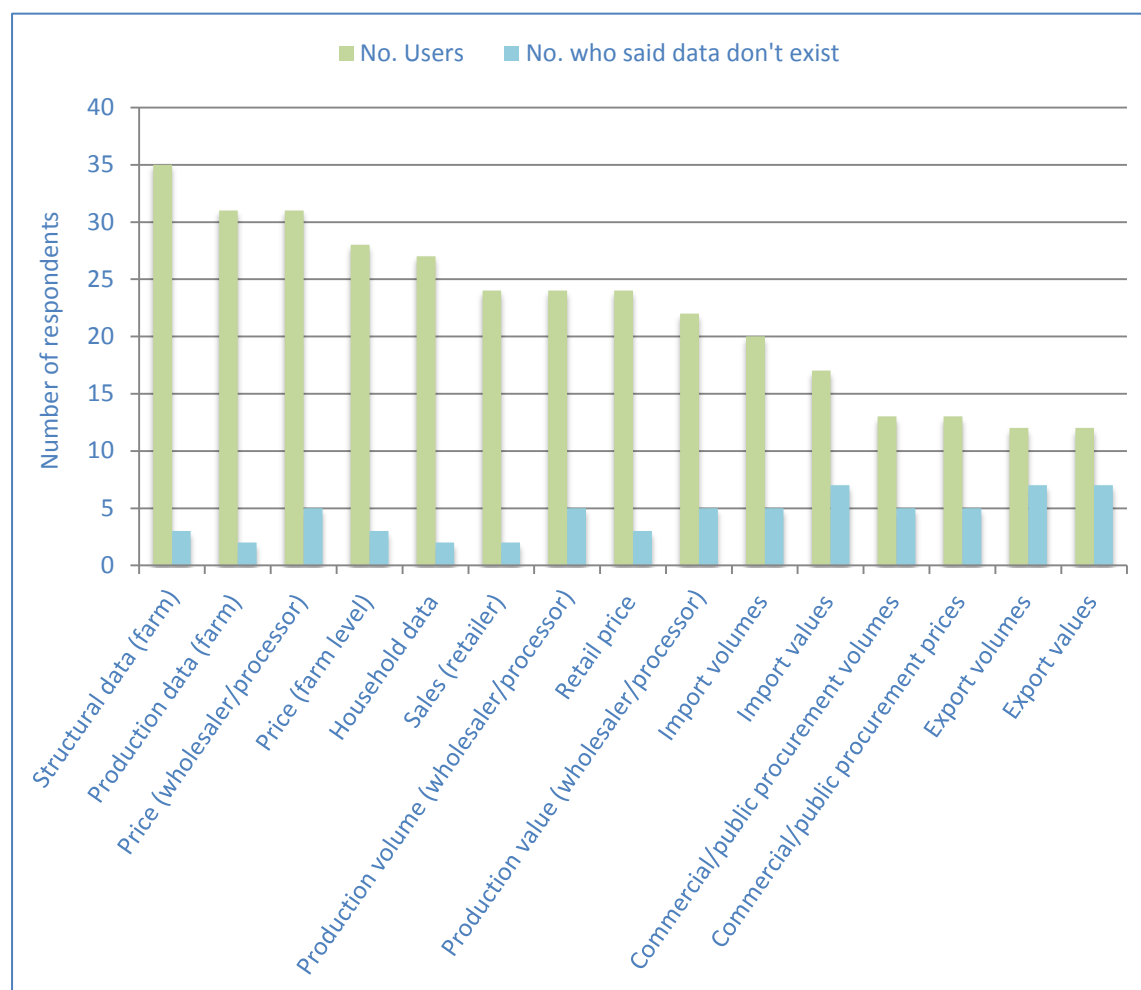


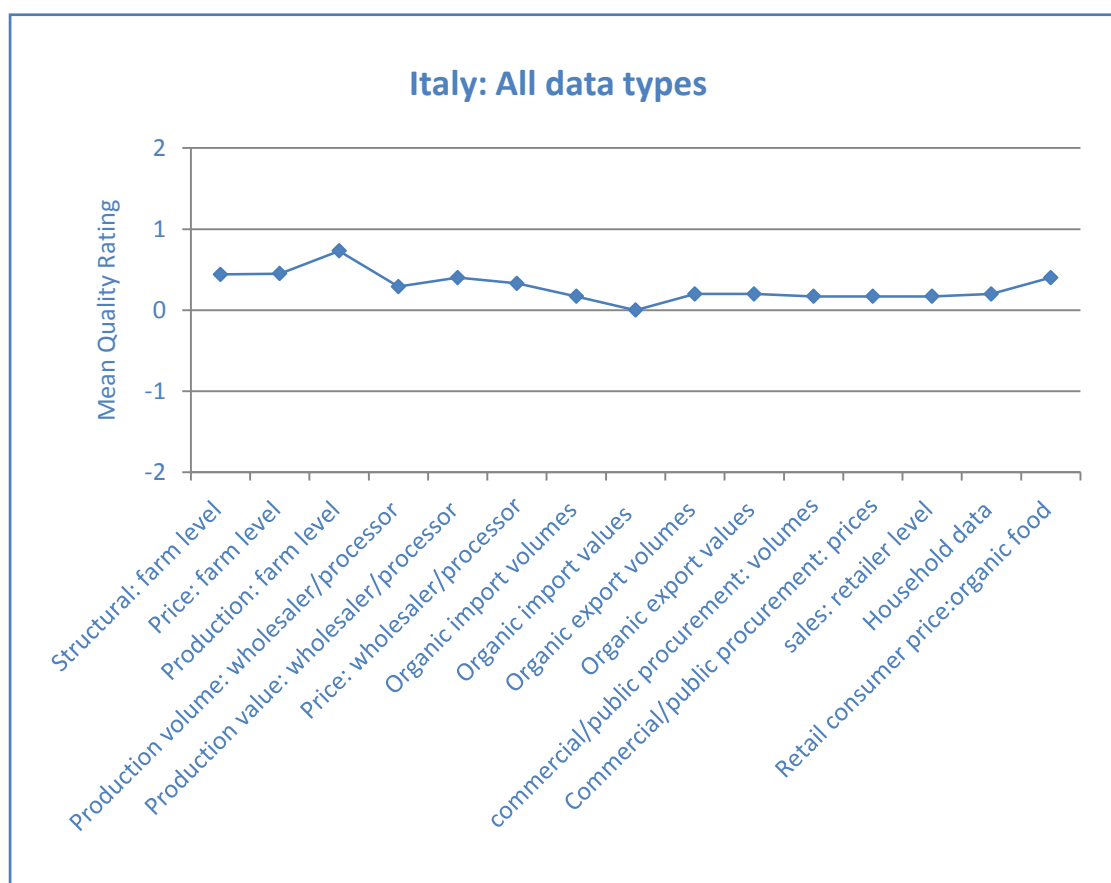
Figure 21: Number of users of each data type in Germany and number of respondents who reported that the respective data type does not exist



#### 4.4 Country report: Italy

The range of respondents from Italy was quite broad and all of the data types were used. International trade data, public procurement data, and retail and household data were all rated as being of particularly low quality in Italy. Respondents treated the Data on commercial/public organic procurement volumes and data on commercial/public organic procurement prices identically. Respondents treated the Data on organic export volumes and data on organic export values identically.

There were 39 respondents from Italy, almost all of whom were producers (70%), distributors of organic produce (43%), and processors of organic products (27%), ranging from 1 to 200 people. The respondents are primarily employed as executive/management (45%), sales (36%), and marketing (25%). The primary uses for organic market data in Italy are for marketing strategy formulation (50%), decision support (41%), Primary production planning/decisions (43%), and strategy/policy development (36%). The most commonly used data is at national (89%) and regional level (79%).



**Figure 22: Mean quality rating for each data type by respondents from Italy (-2 = Low quality, 0 = Neutral, 2 = High quality)**

Please note that the data sources reported for each data type are transposed exactly as reported by respondents. Given the anonymity of the questionnaire, it was not possible to cross reference the existence of the nominated organisations, so it was decided to leave the reported data sources unedited.

## Italy: Responses for specific data types

### 4.4.1 Structural data about organic agriculture at farm level

Structural data about organic agriculture at farm level is used by 19 (48%) of the respondents. It is available to five people who choose not to use it, and is not accessible to three respondents. For the people who do not have access to the data, all would use it monthly if it were available, and all feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available give difficulty of access, expense, and that it is published too infrequently as the reasons. The users of structural data about organic agriculture at farm level report agreement that the available data is relevant (62%), is easily accessible (52.4%) and is affordable (47.6) with most disagreement that it is up to date (9.6%) and easily accessible (14.4%). The quality rating for this data type was 2.44 (sd= 0.86).

Respondents reported sourcing data from:

- LISTINO BORSA GRANARIA MILANO;
- Internet;
- Markets;
- Tea & Coffe Mag,
- Organic Bio,
- AIAB Milano, Ministry of Political Agriculture Rome;
- Organic Cert. Institutes, websites for fruit market info;
- An agronomist;
- CCIAA CNA.

### 4.4.2 Organic price data at farm level

Organic price data at farm level is used by 20 (51%) of the respondents. It is available to three people who choose not to use it, and is not accessible to one respondent. One respondent reports that this data type does not exist. The two people who do not have access to the data would use it weekly if it were available, and feel that they are disadvantaged by lack of access to this data type. The users of organic price data at farm level report agreement that the available data is relevant (73.7%) and is affordable (57.9%) with most disagreement that it that it is accessible (21.1%), comparable with other data (15.8%), and available as often as needed (15.8%). The quality rating for this data type was 2.45 (sd= 0.99).

Respondents reported sourcing data from:

- Fresh Produce Journal;
- Borsa Granaria Milano;
- Market: public market;
- AIAB Milano;
- AIAB;
- AGER Bologna;
- Farmers;
- From Mediators;
- Market survey;

- Market price from Milano and Bologna market places;
- CCIAA.

#### **4.4.3 Organic production (volume and/or value) data at farm level**

Organic production (volume and/or value) data at farm level is used by 20 (51%) of the respondents. It is available to three people who choose not to use it, and is not accessible to three respondents. Two respondents report that this data type does not exist. For the five people who do not have access to the data, all would use it monthly or weekly if it were available, and all feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available give the lack of affordability and the infrequency of publication as the reasons. The users of organic production (volume and/or value) data at farm level report agreement that the available data is relevant (73.3%) and is affordable (60%), is accurate (50%), with most disagreement that it that it is accurate (13.3%), available as often as needed (13.3%) and accessible (13.3%). The quality rating for this data type was 2.73 (sd= 0.75).

Respondents reported sourcing data from:

- Aiab Milano,
- Ministry of Organic Agriculture,
- aiab;
- market survey;
- Internet;
- CCIAA.

#### **4.4.4 Organic production volume data at wholesaler/processor level**

Organic production volume data at wholesaler/processor level is used by 18 (46%) of the respondents. It is available to four people who choose not to use it, and is not accessible to two respondents. Two respondents report that this data type does not exist. For the four people who do not have access to the data, all would use it monthly or weekly if it were available, and all four feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available did not offer reasons. The users of organic production volume data at wholesaler/processor level report agreement that the available data is relevant (67%), with most disagreement that it is accessible (25%), comparable (17%), and available as often as needed (17%). The quality rating for this data type was 2.29 (sd= 0.7).

Respondents reported sourcing data from:

- BORSA GRANARIA MILANO;
- Personal DATA sheets;
- Specialized magazine;
- CCIAA.

#### **4.4.5 Organic production value data at wholesaler/processor level**

Organic production value data at wholesaler/processor level is used by 16 (41%) of the respondents. It is available to five people who choose not to use it, and is not accessible to two respondents. Three respondents report that this data type does not exist. For the five people who do not have access to the data, all would use it monthly or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available gave accuracy, accessibility, and that it is usually out of date as the reasons. The users of organic production value data at wholesaler/processor level at farm level report agreement that the available data is relevant (54.6%), with most disagreement that it that it is easily accessible (18%). The quality rating for this data type was 2.4 (sd= 0.49).

Respondents reported sourcing data from:

- AIAB;
- Specialized magazines;
- CCIAA.

#### **4.4.6 Organic price data at wholesaler/processor level**

Organic price data at wholesaler/processor level is used by 16 (41%) of the respondents. It is available to four people who choose not to use it, and is not accessible to three respondents. Three respondents report that this data type does not exist. For the six people who do not have access to the data, all would use it monthly or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available did not offer reasons. The users of organic price data at wholesaler/processor level report agreement that the available data is relevant (55%) with most disagreement that it that it is accessible (33%). The quality rating for this data type was 2.33 (sd= 0.75).

Respondents reported sourcing data from:

- AIAB,
- Personal data;
- Mediators;
- Customers;
- Specialized magazines;
- CCIAA.

#### **4.4.7 Data on organic import volumes**

Data on organic import volumes is used by 16 (41%) of the respondents. It is available to four people who choose not to use it, and is not accessible to two respondents. Two respondents report that this data type does not exist. For the four people who do not have access to the data, all would use it monthly or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available did not offer reasons. The users of data on organic import volumes report agreement that the available data is relevant

(50%) with disagreement that it is available as often as needed (30%) and comparable (30%). The quality rating for this data type was 2.17 (sd= 0.9).

Respondents reported sourcing data from:

- Aiab,
- Personal data;
- Lavoro solo prodotti aziendali;
- Specialized magazines;
- CCIAA.

#### **4.4.8 Data on organic import values**

Data on organic import values is used by 15 (38%) of the respondents. It is available to four people who choose not to use it, and is not accessible to two respondents. Three respondents report that this data type does not exist. For the 5 people who do not have access to the data, all would use it monthly or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. Two of the three respondents who choose not to use it when available gave lack of relevance as the reason. The users of data on organic import values report agreement that the available data is relevant (44.4%) with most disagreement that it is accessible (33.3%), available as often as needed (33.3%) and comparable (22.2%). The quality rating for this data type was 2 (sd= 1.26).

Respondents reported sourcing data from:

- AIAB Milano;
- specialized magazines;
- CCIAA.

#### **4.4.9 Data on organic export volumes and data on organic export values**

Respondents treated these two data types identically. Data on organic export volumes and values is used by 17 (44%) of the respondents. It is available to three people who choose not to use it, and is not accessible to two respondents. Two respondents report that this data type does not exist. For the four people who do not have access to the data, all would use it monthly or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. One respondent who chooses not to use it when available gave lack of relevance, inaccuracy, and that it is published too infrequently as the reason, while the others offered no reason. The users of data on organic import volumes and values report agreement that the available data is relevant (72.7%) volumes and report most disagreement that it is accessible (36.4%) and available as often as needed (18.2%). The quality rating for this data type was 2.2 (sd= 1.05).

Respondents reported sourcing data from:

- AIAB Milano;
- Fiere e mercati;

- Specialized magazines;
- CCIAA;
- Fiere;
- Internet.

#### **4.4.10 Data on commercial/public organic procurement volumes and data on commercial/public organic procurement prices**

Respondents treated these two data types identically. Data on organic export volumes is used by 14 (36%) of the respondents. It is available to three people who choose not to use it, and is not accessible to two respondents. Three respondents report that this data type does not exist. For the five people who do not have access to the data, four would use it monthly or more often if it were available, and all four feel that they are disadvantaged by lack of access to this data type (the fifth did not respond to this question). The respondents who choose not to use these data types when available did not offer a reason. The users of data on commercial/public organic procurement volumes report agreement that the available data is relevant (71.4%) with the most disagreement that the data is available as often as needed (28.6%). The quality rating for this data type was 2.17 (sd= 1.07).

Respondents reported sourcing data from:

- AIAB Milano;
- AIAB;
- Specialized magazines;
- CCIAA;
- Survey among competitors;

#### **4.4.11 Organic sales (volumes and/or values) data at retailer level**

Organic sales (volumes and/or values) data at retailer level is used by 15 (38%) of the respondents. It is available to four people who choose not to use it, and is not accessible to three respondents. Two respondents report that this data type does not exist. For the five people who do not have access to the data, all would use it monthly or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use these data types when available did not offer a reason. The users of organic sales (volumes and/or values) data at retailer level report agreement that the available data is relevant (55.5%) with the most disagreement that the data is available as often as needed (44.4%) and accurate (22.2%). The quality rating for this data type was 2.17 (sd= 0.9).

Respondents reported sourcing data from:

- AIAB;
- fiere;
- surveys among retailers;
- CCIAA.

#### **4.4.12 Household data (per capita organic food consumption or household expenditures)**

Household data (per capita organic food consumption or household expenditures) is used by 14 (36%) of the respondents. It is available to three people who choose not to use it, and is not accessible to three respondents. Two respondents report that this data type does not exist. For the five people who do not have access to the data, all would use it monthly or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use these data types when available did not offer a reason. The users of household data (per capita organic food consumption or household expenditures) report agreement that the available data is relevant (55.5%) with the most disagreement that the data is accessible (22.2%). The quality rating for this data type was 2.2 (sd= 0.75).

Respondents reported sourcing data from:

- Aiab;
- specialized magazines;
- CCIAA.

#### **4.4.13 Retail consumer price data for organic food**

Retail consumer price data for organic food is used by 15 (38%) of the respondents. It is available to three people who choose not to use it, and is not accessible to two respondents. Two respondents report that this data type does not exist. For the four people who do not have access to the data, all would use it annually or more often if it were available, and all feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use these data types when available did not offer a reason. The users of retail consumer price data for organic food report agreement that the available data is relevant (66.6%) with the most disagreement that the data is available as often as needed (22.2%) and accessible (22.2%). The quality rating for this data type was 2.4 (sd= 0.5).

Respondents reported sourcing data from:

- AIAB;
- mercato;
- specialized magazines;
- CCIAA.

## 4.6 Country report: Spain

The range of respondents from Spain was quite broad and all of the data types were used. Structural data at farm level, production volume data at wholesaler/processor, data on organic export values and household data (per capita organic food consumption or household expenditures) were all rated as being of particularly low quality in Spain. Respondents treated data on organic import volumes and data on organic import values identically. Data on commercial/public organic procurement volumes and prices were treated similarly by respondents and were rated as being of relatively high quality in Spain. There were 27 respondents from Spain who represent almost exclusively the following four types of organizations: organic producers (70%), distributors of organic produce (41%), processors of organic products (37%) and retailers of organic produce (15%), ranging from 1 to 330 people. The respondents are primarily employed as executive/management (52%), sales (48%), marketing (26%), and public relations (20%). The primary uses for organic market data in Spain are for marketing strategy (44%), Primary production planning/decisions (37%), strategy/policy development (30%), and research (26%). The most commonly used data is at national (76%) and regional level (78%).

Please note that the data sources reported for each data type are transposed exactly as reported by respondents. Given the anonymity of the questionnaire, it was not possible to cross reference the existence of the nominated organisations, so it was decided to leave the reported data sources unedited.

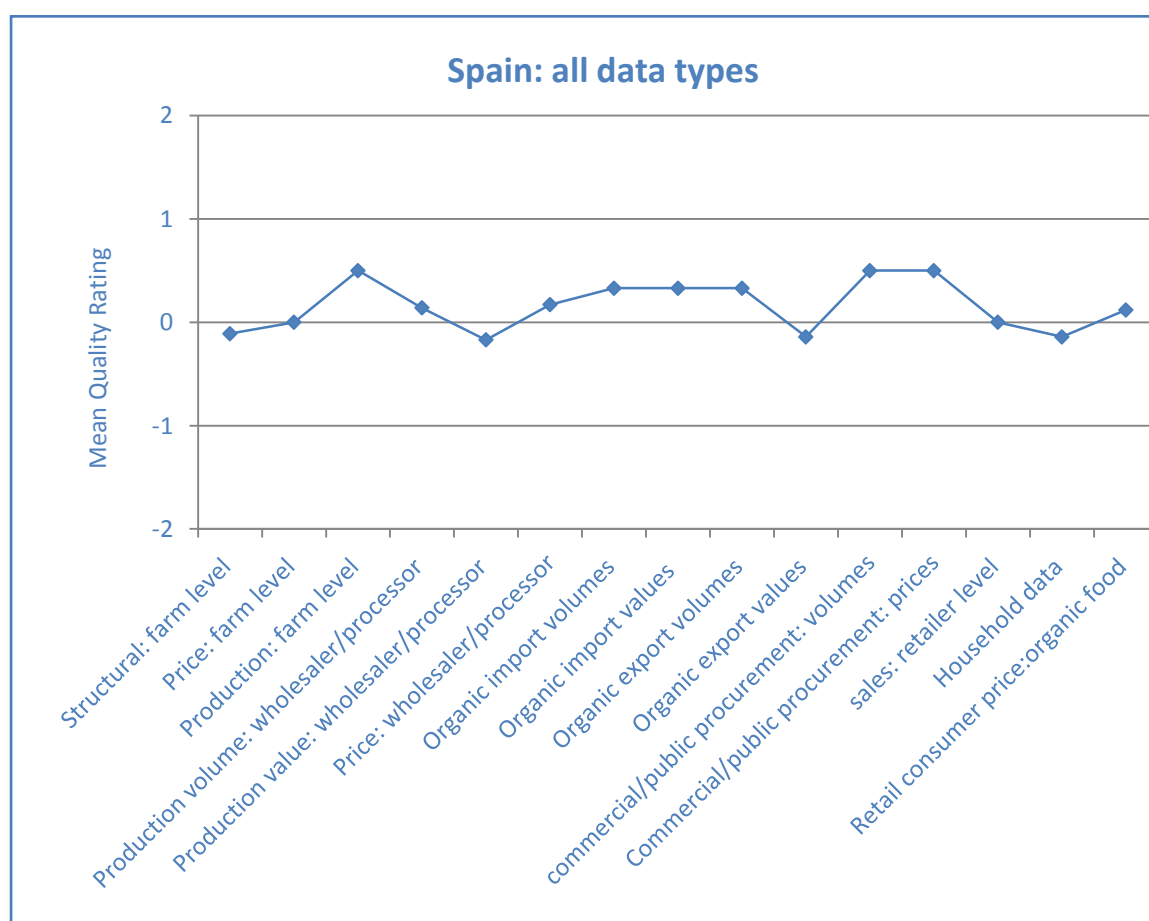


Figure 23: Mean quality rating for each data type by respondents from Spain (-2 = Low quality, 0 = Neutral, 2 = High quality)



## Spain: Responses for specific data types

### 4.6.1 Structural data about organic agriculture at farm level

Structural data about organic agriculture at farm level is used by 12 (60%) of the respondents. It is available to two people who choose not to use it, and is not accessible to two respondents. For the two people who do not have access to the data, one would use it annually if it were available and feels disadvantaged by lack of access to this data type, while the other would use it less frequently and does not feel disadvantaged. The respondents who choose not to use it when available gave lack of relevance, the infrequency and that it is usually out of date as the reasons. The users of structural data about organic agriculture at farm level report agreement that the available data is relevant (90%) and accurate (60%) with most disagreement that it is accessible (50%) and available as often as needed (40%) The quality rating for this data type was 1.89 (sd= 0.87).

Respondents reported sourcing data from:

- Ministerio de Agricultura, y internet;
- Other Data Supplier Publish as “Organic Bio”;
- Revista especializada nacional;
- Darwin, ipex, icex;
- LOCAL FARMERS;
- From the catalan control authority ES-ECO-019-CT;
- Statistics of the regional certification organisation.

### 4.6.2 Organic price data at farm level

Organic price data at farm level is used by 13 (65%) of the respondents. It is available to two people who choose not to use it, and is not accessible to two respondents. For the two people who do not have access to the data, one would use it monthly if it were available, and the other annually. Both feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available did not offer reasons for the choice. The users of organic price data at farm level report agreement that the available data is relevant (78%) and is affordable (44.4) with most disagreement that it is accessible (44.4%). The quality rating for this data type was 2 (sd= 0.71).

Respondents reported sourcing data from:

- Merca Madrid, Merca barna;
- Market Public Prices; alcuza, inaoliva ;
- We are farmers as well. We make our own price with informations of general market and our own costs;
- COAG.

#### 4.6.3 Organic production (volume and/or value) data at farm level

Organic production (volume and/or value) data at farm level is used by 13 (65%) of the respondents. It is available to one person who chooses not to use it, and is not accessible to three respondents. One respondent reports that this data type does not exist. For the four people who do not have access to the data, three would use it annually if it were available and the other monthly. Three feel that they are disadvantaged by lack of access to this data type. The respondent who chooses not to use it when available gave lack of relevance as the reason. The users of organic production (volume and/or value) data at farm level reported agreement reported that the available data is of satisfactory quality across all of the quality indicators with most disagreement that it that it is comparable with other data (25%) and accessible (25%). The quality rating for this data type was 2.5 (sd= 0.9).

Respondents reported sourcing data from:

- Organismos de certificación ecologica;
- Market Public Database;
- Our own organization;
- Gobierno españa;
- Direct from farmers/companies when needed.

#### 4.6.4 Organic production volume data at wholesaler/processor level

Organic production volume data at wholesaler/processor level is used by 13 (65%) of the respondents. It is available to two people who choose not to use it, and is not accessible to two respondents. For the two people who do not have access to the data, one would use it annually and the other would use it monthly if it were available. Both feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available give lack of relevance as the reason. The users of organic production volume data at wholesaler/processor level report agreement that the available data is relevant (55%) and is available as often as needed (33.3%) with most disagreement that it that it is up to date (22% and comparable (22%). The quality rating for this data type was 2.14 (sd= 0.9).

Respondents reported sourcing data from:

- My clients;
- Market Public Database;
- Official reports;
- Gobierno españa;
- Organic trade Green-Bio;
- Local administration.

#### 4.6.5 Organic production value data at wholesaler/processor level

Organic production value data at wholesaler/processor level is used by 12 (60%) of the respondents. It is available to two people who choose not to use it, and is not accessible to three respondents. One respondent reports that this data type does not exist. For the four people who do not have

access to the data, all would use it annually if it were available, and all feel that they are disadvantaged by lack of access to this data type. The respondents who choose not to use it when available gave lack of relevance as the reason. The users of organic production value data at wholesaler/processor level at farm level report little agreement with any of the quality indicators. The quality rating for this data type was 1.83 (sd= 1.06).

Respondents reported sourcing data from:

- Market Public Database;
- Gobierno españa;
- Green-trade Organic-Bio;
- Central administration;
- From the Catalan control authority ES-ECO-019-CT.

#### **4.6.6 Organic price data at wholesaler/processor level**

Organic price data at wholesaler/processor level is used by 13 (65%) of the respondents. It is not accessible to three respondents. For the three people who do not have access to the data, one would use it annually another would use it monthly if it were available and the third did not respond. The users of organic price data at wholesaler/processor level report agreement that the available data is relevant (50%) with little agreement with the remaining quality indicators and with most disagreement that it is accessible (25%). The quality rating for this data type was 2.17 (sd= 0.69).

Respondents reported sourcing data from:

- Market Public Database;
- Gobierno españa;
- Organic-Bio Green Trade;
- Directly from processors.

#### **4.6.7 Data on organic import volumes and data on organic import values**

These data types were treated identically. Data on organic import volumes and values is used by 11 (55%) of the respondents. It is not accessible to two respondents. One respondent reports that this data type does not exist. For the three people who do not have access to the data, two would use it monthly and the other annually if it were available. All three feel that they are disadvantaged by lack of access to this data type. The users of data on organic import volumes and values report agreement that the available data is relevant (83%) with moderate agreement on all the other quality criteria. The quality rating for this data type was 2.33 (sd= 0.9).

Respondents reported sourcing data from:

- Market Public Database;
- Gobierno españa;
- CAAE;
- Market Public Database;

#### 4.6.8 Data on organic export volumes

Data on organic export volumes is used by 11 (55%) of the respondents. It is not accessible to two respondents. One respondent reports that this data type does not exist. For the three people who do not have access to the data, two would use it monthly and the other annually if it were available. All three feel that they are disadvantaged by lack of access to this data type. The users of data on organic export volumes report agreement that the available data is relevant (67%) with moderate agreement on all the other quality criteria except accessibility. The quality rating for this data type was 2.33 (sd= 0.47).

Respondents reported sourcing data from:

- Market Public Database;
- Gobierno españa;
- CAAE.

#### 4.6.9 Data on organic export values

Data on organic export values is used by 11 (55%) of the respondents. It is not accessible to two respondents. One respondent reports that this data type does not exist. For the three people who do not have access to the data, two would use it monthly and the other annually if it were available. All three feel that they are disadvantaged by lack of access to this data type. The users of data on organic export values report agreement that the available data is relevant (85.7%) and affordable (57.1%), with most disagreement that it is accessible (28.8%), and available as often as needed (42.9%). The quality rating for this data type was 1.86 (sd= 0.83).

Respondents reported sourcing data from:

- Market Public Database;
- Gobierno españa;
- From the catalan control authority ES-ECO-019-CT; and
- CAAE.

#### 4.6.10 Data on commercial/public organic procurement volumes and data on commercial/public organic procurement prices

Respondents treated these two data types identically. Data on commercial/public organic procurement volumes and prices is used by 10 (50%) of the respondents. It is available to two people who choose not to use it. One respondent reports that this data type does not exist. The person who does not have access to the data would use it monthly if it were available, and feels that they are disadvantaged by lack of access to this data type. The two respondents who choose not to use these data types when available offered no reason. The users of data on commercial/public organic procurement volumes and prices report agreement that the available data is relevant (67%) with the most disagreement that the data is affordable (33%) and available as often as needed

(33%). The data type scored well on overall quality with the quality rating for this data type as 2.5 (sd= 0.5). The users of data on commercial/public organic procurement prices report agreement with all of the data quality criteria and the data type scored well on overall quality with the quality rating for this data type as 2.5 (sd= 0.5).

Respondents reported sourcing data from:

- Market Public Database;
- Gobierno españa;
- Central administration.

#### **4.6.11 Organic sales (volumes and/or values) data at retailer level**

Organic sales (volumes and/or values) data at retailer level is used by 14 (70%) of the respondents. It is not accessible to three respondents. One respondent reports that this data type does not exist. For the four people who do not have access to the data, two would use it monthly and another annually if it were available (the fourth person did not respond to this question), and all feel that they are disadvantaged by lack of access to this data type. The users of organic sales (volumes and/or values) data at retailer level report agreement that the available data is relevant (55.5%) with the most disagreement that the data is affordable (44.4%) and available as often as needed (44.4%). The quality rating for this data type was 2 (sd= 0.71).

Respondents reported sourcing data from:

- Internet;
- Market Public Database;
- Gobierno españa;
- Consumers and farmers organizations; and
- CAAE.

#### **4.6.12 Household data (per capita organic food consumption or household expenditures)**

Household data (per capita organic food consumption or household expenditures) is used by 13 (65%) of the respondents. It is not accessible to two respondents and one respondent reports that this data type does not exist. For the three people who do not have access to the data, two would use it monthly and the other annually if it were available, and all feel that they are disadvantaged by lack of access to this data type. The users of household data (per capita organic food consumption or household expenditures) report agreement that the available data is relevant (75%) with the most disagreement that the data is accessible (25%). The quality rating for this data type was 1.86 (sd= 0.83).

Respondents reported sourcing data from:

- Internet;
- Market Public Database;
- Gobierno españa;

- Central administration;
- CAAE.

#### **4.6.13 Retail consumer price data for organic food**

Retail consumer price data for organic food is used by 12 (60%) of the respondents. It is not accessible to two respondents. One respondent reports that this data type does not exist. For the three people who do not have access to the data, two would use it monthly and the other annually if it were available, and all feel that they are disadvantaged by lack of access to this data type. The users of retail consumer price data for organic food report agreement that the available data is relevant (75%) and available as often as needed (62.5%) with the most disagreement that the data is accessible (25%). The quality rating for this data type was 2.12 (sd= 0.6).

Respondents reported sourcing data from:

- Internet ;
- Market Public Database;
- Gobierno españa;
- Directly to retailers; and
- CAAE.

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