



GOVERNMENT SUPPORT FOR ORGANIC DATA COLLECTION AND DISSEMINATION

OVERVIEW

This policy summary provides recommendations on why and how to engage in or provide support for data collection and dissemination on the country's organic sector. It outlines options for providing this support, followed by examples from various countries.

SUMMARY OF POLICY OPTIONS

Collection of data on the country's organic sector may be done by government or by other institutions such as universities or organizations such as a national organic umbrella association. In some cases, governments are uniquely capable of collecting and compiling certain data, such as on international trade.

Types of data collected include:

- information on organic farmers suitable for organic producer directories;
- cornerstone data such as the number and area of organic farms and organic market size and share;
- information on organic processors and other businesses such as input suppliers;
- international trade data regarding organic products exported and imported;
- price and other data on market transactions on various organic products

In early stages of development, governments may conduct or finance a national survey/study on the situation of organic agriculture in the country, including an overview of organic production, active stakeholders (e.g. associations, businesses, certifiers), the standards and labels in use, and existing market channels for organic products. Such a publicly available study report supports the organic sector development and can serve as a basis for subsequent national organic action plan development.

Although the old format of newsletters and printed directories still exist and are used, digital tools are rapidly developing to disseminate data in a more efficient way. They range from searchable online databases and active maps to smart-phone apps. Online tools for the collection of data are, so far, used only rarely. One example is the OTX platform that captures organic farm gate prices <https://trade.o-tx.com>

RATIONALE

The existence of comprehensive data on the national organic sector is very important to enable the growth of the sector because:

- It underlies development of a sound national strategy to develop the sector;



- Precise data on organic operators allow policy makers to better plan the type and amount of support needed, to calculate budget and expected coverage of their policy measures, etc.;
- Data about the size and development of the organic market assists market actors to make informed decisions.
- Access to a directory of national or regional producers and organic businesses facilitates market actors in establishing commercial relationships (e.g. in identifying new suppliers). This includes consumers who through directories can access organic products through various channels, including direct sales by producers;
- In international negotiations, the importance of the domestic national organic sector and market needs to be substantiated by solid data;
- It guides researchers, academic institutions and other support structures in providing adequate outputs and services nationally;
- Tracking sector growth data demonstrates the potential of organic agriculture and helps to attract investors, organic input manufacturers and other supporting businesses;
- Comparative annual statistics on the organic sector enables the assessment of the impact of national (or regional) policies (including trade agreements) on organic agriculture and the adjustment of those policies to maximize effectiveness.

Compiling national data on the organic sector is a typical public good service that will benefit multiple stakeholders, including the government itself. Unless there is a strong national organic association that can take on this task (and even so, they would typically need on-going financial support to do it), the main responsibility for this falls logically on the national government. However, business data, such as organic market research on trends and consumer attitudes, are often collected by national industry bodies (when those exist) and commercial market research firms, while more detailed production data (yields) are collected by research or extension services.

SCOPE

Data collection and dissemination is a policy measure suitable to all stages of development of the organic sector, from embryonic stages to stages of well-developed production and consumption. The intensity of the data collection (frequency and level of details) needed will vary depending on the development stage of the sector. At early stages, a punctual



study to roughly locate organic producers and have an idea of their production systems and the existing market channels is enough to inform subsequent policy action. When the organic sector is well developed and organized trade is significant, then detailed production data and organic trade figures become important to monitor on a regular basis.

Collection of some kinds of data is greatly facilitated when an organic regulation is in place. A regulation provides clear criteria for who may be considered organic (legal definition). It also implies a duty from the side of the government in terms of enforcement, for which the competent authority should anyways have the list of certified organic operators and access to the data of the accredited certifiers. However, in unregulated systems, the government may still conduct (or support) data collection, for example in the form of survey and studies or via general agriculture census.

POLICY OPTIONS

Information on organic farmers suitable for organic producer directories

Data on the location of organic producers, their contact information, products and sales channels facilitate publication of a directory of organic farms, which can be used by traders, caterers, retailers and consumers

to identify organic farmers in their regions. The transparent publication of all certified operators also contributes to supporting compliance, as there will be more eyes watching what happens on those organic farms.

Cornerstone data

The cornerstone for production comprises statistics on the number of organic producers, and the total area certified including crop information and land used for grazing. This is easily compiled for certified operations and those in conversion in countries with organic regulations, as it will be in the certifiers' databases. This type of data may also be available from organic producer associations, or it may be obtained through surveys or census of agriculture.

Cornerstone market data includes the value of the domestic organic market (usually retail sales) and market share of total retail sales. Value of national organic exports is also cornerstone data. Market data is more challenging to access, and will require cooperation of producers, retailers and associations. It is more accessible when the organic sector is well coordinated and integrated in the food and agriculture sector. In developed countries market research firms often play a large role in compiling (and selling) research data on organic markets.



Information on organic processors and other businesses such as input suppliers

Information on these businesses is appropriate to developing directories and is also helpful for organic value chain development. Directories can be developed either by governments or by organic trade associations, possibly with support from the government for data collection beyond the scope of the association's membership.

International trade data regarding organic products exported and imported

International trade data collection is best supported by establishing specific "HS" (Harmonized Systems) codes for organic products, which are recorded in export and import transactions. Sub-codes can be established for organic versions of each commodity. To this date, only a few countries have established such separate codes (namely the US, Canada and Italy). Import tracking relies on the existence of the exporting country's sub-codes. As this system can collect data through customs, the government will have exclusive access to it.

Trade data can also be compiled by other means, such as reporting by businesses, but this method will not be as reliable as using a code system.

Price and other data on market transactions for various organic products

This service is useful to organic producers for planning production, marketing and sales. Currently only a few countries have such data available. Examples are the United States and some European countries (Denmark, France, Germany, Netherlands, UK), in some cases however, only for selected products. In the United States this information is compiled by the USDA Agricultural Marketing Service and published in a service called Market News, which issues organic market news reports (<https://www.ams.usda.gov/market-news/organic>).



COUNTRY EXAMPLES

Switzerland: The government co-funds the annual compilation of global organic statistics by FiBL. “The World of Organic Agriculture”, published annually by FiBL and IFOAM-Organics International, provides a global overview of organic farming statistics including area under organic management, specific information about land use in organic systems, numbers of farms and other operator types as well as selected market data.

European Union: the regulation on organic farming requires all EU member states to provide basic data on organic farming to Eurostat. With the exception of Chile, there is no other country or region in the world where data collection on organic farming is mandatory in the organic regulation. Since 2008, the obligation to provide the data is defined legally in the EU organic regulation. Eurostat, the EU’s statistical office, compiles for each country the number of organic operators, the organic crop areas and production, organic livestock and livestock production. Each Member State and some other European countries are asked to provide the data on an annual basis, using a harmonized questionnaire. The data are usually based on data of the control bodies, which are then compiled by the national authorities. Eurostat publishes the data on its website, in several searchable databases in English, French and German.

Retail sales data are mostly collected by private research companies and then disseminated by the private organic sector (Belgium, Germany, The Netherlands, Sweden and United Kingdom). Only in Denmark and Sweden, is this data also collected by the national statistical offices. In Spain, an annual study on retail sales is commissioned by the Ministry of Agriculture. Denmark has probably the best system for organic data collection in place for organic retail sales and international trade data. Since 2003, this data has been collected annually from companies by Statistics Denmark. For retail sales, per-product volumes and value are collected from supermarkets, which constitute approximately 90 % of all organic sales in Denmark. For imports and export, values are available by product and by country. A new feature is the data collection on catering sales data. All data are easily accessible in Danish and English via an online database at the Statistics Denmark website.

In **Latin America** most countries have an organic regulation and hence data on area, production, and in some cases livestock, are available for several countries. There are some very good examples of collection systems for export data (Argentina, Chile, Dominican Republic, Ecuador, Peru), which by far exceed the scope and quality of export data that are available from major organic markets such as Germany, where nothing is



available. The strong focus on export data reflects the importance of organic exports for Latin America.

Argentina: It has one of the best data collection systems in Latin America for area, livestock and export volume data, including exports by destination. Each March a comprehensive, consistently structured, detailed report is issued by SENASA, the authority in charge. The Ministry is currently financing the establishment of the Guía Orgánica (Organic Guide) interactive website in which consumers interested in organics can find organic points of sales, products, and product information.

China: CNCA (the National Certification and Accreditation Administration) is responsible for collecting, compiling and releasing national statistics on organic agriculture. Since 2005, collection efforts have continuously been enhanced. In 2014, a “White Book” on organic farming in China was published, giving access to the data (area, production, exports, imports, domestic market) and substantial background information. An English translation of the white book by the company “Organic and Beyond” has made the information internationally accessible. China is currently working to integrate the data for the international certifiers, thus making the picture more complete.

India: APEDA, the Agricultural & Processed Food Products Export

Development Authority, compiles data on exports through Tracenet, an online software for organic certification which issues the Organic Scope and Transaction Certificate. Basic data (area) and some export volume data are displayed on the APEDA website.

The Philippines: The 2010 organic law mandates the BAR (Bureau of Agricultural Research) to coordinate with other agencies on data and information on organic agriculture. Since in The Philippines, the vast majority of organic producers are not third party certified, organic certifiers cannot be used as the main source of statistics. The National Organic Agriculture Program (NOAP) maintains a database and publishes yearly statistics that include third party certified, PGS-certified and non-certified organic producers. The data is obtained through agricultural technicians in the Local Government Units, who are assigned to implement the NOAP and expand the adoption of organic agriculture in their area of responsibility.

Tunisia: Data on production area and export are collected by the Ministry of Agriculture. The data and producer lists are presented on the website of the Technical Centre of Organic Agriculture. Tunisia is the only country in Africa that has a governmental data collection system in place.

Canada: The government has some specific HS codes for organic imports



(63 codes currently), which cover a limited number of products. 13 new export codes for organic grain and commodities will be implemented 2017. The federal government also includes two questions on organic in their Agricultural Census that takes place every five years.

The province of Quebec has a mandatory organic data collection system through CARTV, their council in charge of quality schemes. It collects information on all organic operators in Quebec, including acreages and other statistics.

United States: Several private and public institutions are engaged in the regular collection of data on organic agriculture. A wide range of production-related data as well as international trade data is available from the United States Department of Agriculture (USDA).

- Organic production data collection is done by USDA's National Agricultural Statistics Service. Five comprehensive surveys on organic agriculture (2008, 2011, 2014, 2015, and 2017 in progress) have been conducted. The data are directly

collected from the producers. These surveys asked about organic farming and ranching activities, including a wide range of indicators.

- The USDA Agricultural Marketing Service (AMS) freely disseminates market and pricing information for approximately 250 organic products through its USDA Market News and ERS has published historical prices comparisons across commodity sectors based on AMS data.
- For external trade data (exports and imports), the USDA introduced in 2011 selected specific HS tariff codes for selected fresh and processed organic agricultural products, and has been adding new codes annually. This HS coding does not yet fully capture existing organic trade, but it has proven to be a useful tool to evaluate changes in trade that may result from equivalence agreements such as the EU-U.S. arrangement.