



AUSTRALIAN ORGANIC MARKET REPORT 2006-07 SURVEY

We all know the organic sector is growing ...

But exactly how much? And which sectors are really performing?

With your assistance, we will be reporting back to you on the size and scope of the organic industry by sector type in Australia, from food and fibre, production, retail sales and exports.

Your valuable contribution to this ground-breaking, landmark project for the organic industry project is

- Vital for your business planning and industry development
- Completely anonymous and confidential
- Just a half-hour contribution of your time, with the opportunity to win a prize

NOTE: Most businesses will only need to complete a total of three to six pages of this survey

To address this lack of detailed industry information we are conducting a survey to determine the size and scope of the Australian organic retail and export market. The survey is being undertaken by the University of New England with wide support from government and organic industry groups. Results will be published in the new *Australian Organic Market Report* in early 2008.

The value of this organic industry survey depends on your willingness to answer and return this questionnaire by Friday 28th September 2007. This is an opportunity for you to have input to this new and important project that will provide valuable information and further develop the Australian organic industry and help with your own business planning.

As an incentive to participate, respondents completing surveys will be randomly selected to receive a \$50 Gift Voucher for a range of organic publications.

What you need to do now...

1. Fill out the survey, completing only the sections relevant to your business. Note that all questions relate to business activities from the 1st July 2006 to 30th June 2007 financial year.
2. Place it in an envelope and mail it to the Reply Paid address given at the bottom of each page. Postage is free, so no stamp is required.

If you would like to discuss any of the Questions, please contact:

Dr Paul Kristiansen

School of Environmental & Rural Science, University of New England

Phone: (02) 6773 2962 Fax: (02) 6773 3238 Email: paul.kristiansen@une.edu.au

Best wishes

Paul

Survey participants will remain completely anonymous and the responses will remain confidential. All hard-copy and electronic data will be kept securely for five years after which time all hard-copy material will be destroyed and the electronic data will be kept on a CD securely stored in a locked filing cabinet at UNE for a further five years to enable future research. No organic industry group or government department will have access to data that can identify respondents.

This project has been approved by the Human Research Ethics Committee of the University of New England (Approval No. HE07/151p, Valid to 30/9/08). Should you have any complaints concerning the manner in which this research is conducted, please contact the Research Ethics Officer at: Research Services, University of New England, NSW 2351. Phone: (02) 6773 3449 Fax (02) 6773 3543. Email: ethics@une.edu.au.

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Please complete and return by **Friday 28th September 2007** to:

"REPLY PAID 61883 (Agronomy), Organic Market Survey, University of New England, NSW 2351"

Australian Organic Market Report – 2006-07 Survey

Completing the questionnaire

Section A: All organic farm and business operators should complete this Section.

Sections B to E: Complete all sections that are relevant to your organic business. You may complete more than one section (e.g. beef cattle, wool and grains).

Sections F: All organic farm and business operators should read this Section and optionally complete it.

NOTE: Most businesses will only need to complete three to six pages of this survey

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SECTION A. General information

Q1. Name of Business	
Q2. Contact Name	
Q3. Town or locality	
Q4. Postcode	
Q5. Organic certification license number (If pre-certification write 'pre-cert')	
Q6. Which organisation do you use for organic certification?	
Q7. Do have organic accreditation with an overseas organisation (e.g. JAS, NOP, IFOAM)?	
Q8. Are you a primary producer? If No , go to the Question 10. If Yes , a. how many years have you farmed? b. farmed under organic certification?	Yes <input type="checkbox"/> No <input type="checkbox"/> 0-5yrs <input type="checkbox"/> 6-10yrs <input type="checkbox"/> 10-15yrs <input type="checkbox"/> 15-20yrs <input type="checkbox"/> 20yrs + <input type="checkbox"/> 0-5yrs <input type="checkbox"/> 6-10yrs <input type="checkbox"/> 10-15yrs <input type="checkbox"/> 15-20yrs <input type="checkbox"/> 20yrs + <input type="checkbox"/>
Q9. In regard to bio-dynamic farming	a. do use bio-dynamic preparations? Yes <input type="checkbox"/> No <input type="checkbox"/> b. do you have bio-dynamic certification? Yes <input type="checkbox"/> No <input type="checkbox"/>

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Q10. If you are a certified organic retailer, wholesaler, processor, manufacturer, abattoir or other post-producer enterprise, how long have you been certified?

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Q11. What is the size of your farm in hectares or acres? (Please include leased and share-farmed areas)

	Hectares	Acres
Total area		
Certified organic farmed area		
In-conversion farmed area		
Pre-cert farmed area		
Conventionally farmed area		

Q12. How many people do you employ? (Please average for the year and include Owner/Management and Family)

Full time: _____ Casual (part-time): _____ Seasonal: _____

Q13. Average age of Employees (Please indicate number of Employees that fall into each age bracket)

	Owner/Manager	Other employees
15 - 19 years		
20 - 25 years		
26 - 35 years		
36 - 55 years		
56 years or more		

Q14. Education and Skills of Employees (Please indicate number of Employees that fall into each Category)

	Owner/Manager	Other employees
Completed to Grade 10 Secondary		
Completed Secondary (to Grade 12)		
Completed Tertiary Education Study		
Completed Other Further Education		
Completed other courses/traineeships		

Q15. For the following activities that are relevant to your organic business, please enter the dollar value of those activities for the financial year 1st July 2006 – 30th June 2007 and the percentage of time your business spent on such activities.

	✓	Value (\$)	Proportion of business time (%)
On farm processing			
Educational activities			
Tourism activities			
On farm retailing			
On farm catering			

Thank you for completing Section A. Please now go to the next Part in Section B that is relevant to your business as indicated on Page 2 of the questionnaire.

SECTION B. Primary Producers

PART 1. Beef

IF YOU PRODUCE OR SELL **CERTIFIED ORGANIC OR IN-CONVERSION BEEF CATTLE**, PLEASE COMPLETE THIS SECTION

Q1. Please state the total number of certified organic cattle produced on farm, and then specify the number sold and retained on your holding from 1st July 2006 – 30th June 2007.

	Breeding stock	Stores	Finished
Total number of certified cattle on farm from 1st July 2006 – 30th June 2007			
Number retained on farm			
Number sold as organic			
Number sold as in-conversion			
Number sold as conventional due to finishing specifications			
Number sold as conventional due to a lack of organic market outlets			
Number sold as conventional for other reason e.g. pre-cert (please specify)			

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO CATTLE SOLD AS CERTIFIED ORGANIC ONLY

Certified organic store cattle

Q2. Where did you sell certified organic store cattle between 1st July 2006 and 30th June 2007?

Market Outlet	Approximate number store cattle sold to each market outlet	Average price (\$ per head)	Which state was the market outlet located in?
Direct to producer			
Livestock market			
Other (please specify)			

Q3. Were the animals mostly: Grain fed Pasture fed Both

Q4. To what extent do you expect your production of **certified organic store cattle** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008) Please tick only one box.

- Significant increase (at least 10%)
- Marginal increase (up to 10%)
- Remain similar to present
- Marginal decrease (up to 10%)
- Significant decrease (at least 10%)

Q5. Did you buy in **certified organic store cattle** for finishing between 1st July 2006 – 30th June 2007? Yes No
 If yes, from which state and how many? _____

Certified organic finished cattle

Q6. Of the proportion of finished cattle that were sold as organic between 1st July 2006 – 30th June 2007, please specify market outlet, number sold and price received:

Market Outlet	Approximate number of finished organic cattle sold to each market outlet	Average price (\$/kg) received (excl. transport and commission)	Which state was this market outlet located in?
Producer Group/Co-operative			
Direct to abattoir			
Own on-farm processing unit			
Wholesaler			
Processor			
Supermarket			
Organic retailer			
Own Home Delivery Scheme			
Farmers Market			
Own Farm Shop/gate/retail outlet			
Own mail order scheme			
Other (please specify)			

Q7. To what extent do you expect your production of **finished certified organic cattle** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008) Please tick only one box.

Significant increase (at least 10%)

Marginal increase (up to 10%)

Remain similar to present

Marginal decrease (up to 10%)

Significant decrease (at least 10%)

Q8. Please give details of any constraints or opportunities you face in developing/expanding this enterprise:

PART 2. Lamb

IF YOU PRODUCE OR SELL **CERTIFIED ORGANIC OR IN-CONVERSION LAMB**, PLEASE COMPLETE THIS SECTION

Q1. Please state the total number of organic lamb produced on farm, and then specify the number sold and retained on your holding between 1st July 2006 – 30th June 2007.

	Breeding stock	Stores	Finished
Total number produced from 1 July 2006 – 30 June 2007			
Number retained on farm			
Number sold as organic			
Number sold as in-conversion			
Number sold as conventional due to finishing specifications			
Number sold as conventional due to a lack of organic market outlets			
Number sold as conventional for other reason e.g. pre-cert (please specify)			

Q2. Were the animals mostly: Grain fed Pasture fed Both

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO LAMBS SOLD AS CERTIFIED ORGANIC ONLY

Certified organic store lambs

Q3. Where did you sell last years **certified organic** store lambs, between 1st July 2006 – 30th June 2007?

Market Outlet	Approximate number store lambs sold to each market outlet	Average price (\$ per head)	Which state was this market outlet located in?
Direct to producer			
Livestock market			
Other			

Q4. To what extent do you expect your production of **certified organic store lambs** to change over the next financial year? (i.e. between 1st July 2007 – 30th June 2008). Please tick only one box.

- Significant increase (at least 10%)
- Marginal increase (up to 10%)
- Remain similar to present
- Marginal decrease (up to 10%)
- Significant decrease (at least 10%)

Q5. Did you buy in **certified organic store lambs** for finishing between 1st July 2006 – 30 June 2007? Yes No
 If yes, from which state and how many? _____

Certified organic finished lamb

Q6. Of the proportion of finished lamb that was sold as organic between 1st July 2006 – 30th June 2007, please specify market outlet, number sold and price received:

Market Outlet	Approximate number of finished organic lamb sold to each market outlet	Average price (\$/kg) received (excl. transport and commission)	Which state was this market outlet located in?
Producer Group			
Direct to abattoir			
Wholesaler			
Processor			
Supermarket			
Organic retailer			
Own Home Delivery Scheme			
Farmers Market			
Own Farm Shop/gate/retail outlet			
Own mail order scheme			
Other (please specify)			

Q7. To what extent do you expect your number of **finished certified organic lamb** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008). Please tick only one box

- Significant increase (at least 10%)
- Marginal increase (up to 10%)
- Remain similar to present
- Marginal decrease (up to 10%)
- Significant decrease (at least 10%)

Q8. Please give details of any constraints or opportunities you face in developing/expanding this enterprise:

PART 3. Wool

IF YOU PRODUCE OR SELL **CERTIFIED ORGANIC OR IN-CONVERSION WOOL**, PLEASE COMPLETE THIS SECTION

Q1. Please state the total amount of organic wool produced on farm, and then specify the amount sold and price received between 1st July 2006 – 30th June 2007.

	Amount (tonnes or kg)	Average price (\$ per tonne or kg)	Which state/country was the final market outlet located in?
Total amount of organic wool produced from 1st July 2006 – 30th June 2007			
Amount sold as organic			
Amount sold as in-conversion			
Amount sold as conventional due to a lack of organic market outlets			
Amount sold as conventional for other reason e.g. pre-cert (please specify)			
Amount exported as organic			
Amount exported as in-conversion			

Q2. How many sheep did you stock for wool production between 1st July 2006 – 30th June 2007? _____

Q3. What were your primary breeds for wool production? _____

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO WOOL SOLD AS CERTIFIED ORGANIC ONLY

Q4. To what extent do you expect your production of **certified organic wool** to change over the next financial year? (i.e. between 1st July 2007 – 30th June 2008). Please tick only one box

- | | |
|-------------------------------------|--------------------------|
| Significant increase (at least 10%) | <input type="checkbox"/> |
| Marginal increase (up to 10%) | <input type="checkbox"/> |
| Remain similar to present | <input type="checkbox"/> |
| Marginal decrease (up to 10%) | <input type="checkbox"/> |
| Significant decrease (at least 10%) | <input type="checkbox"/> |

Q5. Please give details of any constraints or opportunities you face in developing/expanding this enterprise:

PART 4. Poultry (meat)

IF YOU PRODUCE OR SELL **ORGANIC OR IN-CONVERSION TABLE BIRDS**, PLEASE COMPLETE THIS SECTION

Q1. Please state the total number of organic table birds produced on farm, and then specify the number sold as organic and non-organic between 1st July 2006 – 30th June 2007.

Please specify main type of bird, e.g. chicken, turkey	
	Finished birds
Total number produced between 1st July 2006 – 30th June 2007	
Number sold as organic	
Number sold as non-organic because in-conversion	
Number sold as non-organic due to a lack of organic market outlets	
Number sold as non-organic for other reason e.g. pre-cert (please specify)	
Amount exported as organic	

Q2. On average how many birds did you have in your flock between 1st July 2006 – 30th June 2007? _____

Q3. Did you buy-in any certified organic day old chicks between 1st July 2006 – 30th June 2007? Yes No
If yes, from which state and approximately how many? _____

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO TABLE BIRDS SOLD AS CERTIFIED ORGANIC ONLY

Q4. Of the proportion of **table birds that were sold as certified organic** between 1st July 2006 – 30th June 2007 please specify market outlet, number sold and price received:

Market Outlet	Approximate number of certified organic birds sold to each market outlet	Average price received for organic birds (excl. transport & commission) cents per kilogram	Which state/country was the market outlet located in?
Producer group			
Direct to processor			
Own on-farm processing unit			
Wholesaler			
Supermarket			
Organic retailer			
Export			
Own Home Delivery Scheme			
Farmers Market			
Own Farm Shop/gate/retail outlet			
Own mail order scheme			
Other (please specify)			

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Q5. To what extent do you expect your production of **certified organic table birds** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008). Please tick only one box.

Significant increase (at least 10%)

Marginal increase (up to 10%)

Remain similar to present

Marginal decrease (up to 10%)

Significant decrease (at least 10%)

Q6. Please give details of any constraints and/or opportunities you face in developing/expanding this enterprise:

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PART 5. Poultry (eggs)

IF YOU PRODUCE OR SELL **CERTIFIED OR IN-CONVERSION ORGANIC EGGS**, PLEASE COMPLETE THIS SECTION

Q1. Please state the total number of certified organic eggs produced on farm, and then specify the number sold as certified organic and non-organic between 1st July 2006 – 30th June 2007.

Please specify type of bird used for egg production, e.g. chicken, duck	
	Number of eggs (dozen)
Total produced between 1st July 2006 – 30th June 2007	
Total sold as organic	
Total sold as non-organic because the flock is in-conversion	
Total sold as non-organic due to a lack of organic market outlets	
Total sold as non-organic for other reason e.g. pre-cert (please specify)	
Total exported as organic	

Q2. How many laying hens, on average, in your flock between 1st July 2006 – 30th June 2007? _____

Q3. Did you buy-in any pullets between 1st July 2006 – 30th June 2007? Yes No

If yes, from which state and approximately how many? _____

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO EGGS SOLD AS CERTIFIED ORGANIC ONLY

Q4. Of the proportion of eggs that were sold as certified organic between 1st July 2006 – 30th June 2007 please specify market outlet, number sold and price received.

Market Outlet	Approximate number of certified organic eggs sold to each market outlet (dozen)	Average price received for organic eggs (dozen) (excl. transport & commission)	Which state/country was the market outlet located in?
Direct to processor			
Producer group			
Direct to wholesaler			
Own on-farm processing unit			
Wholesaler			
Supermarket			
Organic retailer			
Export			
Own Home Delivery Scheme			
Farmers Market			
Own Farm Shop/gate/retail outlet			
Own mail order scheme			
Other (please specify)			

Q5. To what extent do you expect your production of **certified organic eggs** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008). Please tick only one box

- Significant increase (at least 10%)
- Marginal increase (up to 10%)
- Remain similar to present
- Marginal decrease (up to 10%)
- Significant decrease (at least 10%)

Q6. Please give details of any constraints and/or opportunities you face in developing/expanding this enterprise:

PART 6. Milk and dairy products

IF YOU PRODUCE OR SELL **CERTIFIED ORGANIC OR IN-CONVERSION MILK**, PLEASE COMPLETE THIS SECTION

Q1. Please state total litres of certified organic and in-conversion milk produced, and then specify the volume sold as organic and non-organic between 1st July 2006 – 30th June 2007.

Please specify type of your main animal milk produced from, e.g. cow, goat	
Total volume of milk produced between 1st July 2006 to 30th June 2007	
Volume of milk sold with an organic premium	
Volume of milk sold as non-organic because the herd is in-conversion	
Volume of milk sold as non-organic due to a lack of organic market outlets	
Volume of milk sold as non-organic for other reason e.g. pre-cert (please specify)	

Q2. On average how many dairy animals did you have in your herd during 1st July 2006 – 30th June 2007?

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO MILK SOLD WITH AN ORGANIC PREMIUM ONLY

Q3. Please specify litres of milk sold, price received and market outlet used in the proportion of milk that was sold as certified organic between 1st July 2006 – 30th June 2007.

Market Outlet	Approximate litres of <i>organic milk</i> sold to each market outlet	Average price (\$ per litre) received for organic milk (excl. transport & commission)	Which state/country was this market outlet located in?
Producer group			
Direct to processor			
Own on-farm processing unit			
Wholesaler			
Supermarket			
Organic retailer			
Export			
Own Home Delivery Scheme			
Farmers Market			
Own Farm Shop/gate/retail outlet			
Other (please specify)			
Other (please specify)			

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Q4. To what extent do you expect your production of **certified organic milk** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008). Please tick only one box

Significant increase (at least 10%)

Marginal increase (up to 10%)

Remain similar to present

Marginal decrease (up to 10%)

Significant decrease (at least 10%)

Q5. Please tick any of the following value-adding activities undertaken in your certified organic dairy business and enter the dollar value for the financial year July 2006 – June 2007 and the proportion of time your business spent on such activities:

Product manufactured	Value (\$)	Proportion of business time (%)
Butter		
Cheese		
Cream		
Ice cream		
Yoghurt		

Q6. Please give details of any constraints and/or opportunities you face in developing/expanding this enterprise:

PART 7. Pigs

IF YOU PRODUCE OR SELL **CERTIFIED ORGANIC OR IN-CONVERSION PIGS**, PLEASE COMPLETE THIS SECTION

Q1. Please state the total number of organic pigs produced on farm and then specify the number sold and retained on your holding between 1st July 2006 – 30th June 2007.

	Breeding stock	Weaners	Finished
Total number produced between 1st July 2006 – 30th June 2007			
Number retained on farm			
Number sold as organic			
Number sold as non-organic because in-conversion			
Number sold as non-organic due to finishing specifications			
Number sold as non-organic due to a lack of organic market outlets			
Number sold as non-organic for other reason e.g. pre-cert (please specify)			

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO PIGS SOLD AS CERTIFIED ORGANIC ONLY

Certified organic weaner pigs

Q2. Where did you sell last year's **certified organic weaner pigs**, between 1st July 2006 – 30th June 2007?

Market Outlet	Approximate number organic weaners sold to each market outlet	Average price (\$ per head)	Which state was the market outlet located in?
Direct to producer			
Livestock market			
Other			

Q3. To what extent do you expect your production of **certified organic weaner pigs** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008). Please tick only one box.

- Significant increase (at least 10%)
- Marginal increase (up to 10%)
- Remain similar to present
- Marginal decrease (up to 10%)
- Significant decrease (at least 10%)

Certified organic finished pigs

Q4. Between 1st July 2006 – 30th June 2007 did you buy in **certified organic finished pigs** for finishing? Yes No
If yes, where from which state and how many? _____

Q5. Of the proportion of **finished pigs** that were sold as certified organic between 1st July 2006 – 30th June 2007, please specify number sold, price received and market outlet.

Market Outlet	Approximate number of finished organic pigs sold to each market outlet	Average price (\$/kg) received (excl. transport and commission)	Which state was this market outlet located in?
Producer Group			
Direct to abattoir			
Own on-farm processing unit			
Wholesaler			
Processor			
Supermarket			
Organic retailer			
Own Home Delivery Scheme			
Farmers Market			
Own Farm Shop/gate/retail outlet			
Own mail order scheme			
Other (please specify)			

Q6. To what extent do you expect your your number of **certified organic finished pigs** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008). Please tick only one box.

Significant increase (at least 10%)

Marginal increase (up to 10%)

Remain similar to present

Marginal decrease (up to 10%)

Significant decrease (at least 10%)

Q7. Please give details of any constraints or opportunities you face in developing/expanding this enterprise:

PART 8. Other livestock

IF YOU PRODUCE OR SELL CERTIFIED **ORGANIC OR IN-CONVERSION LIVESTOCK OTHER THAN THOSE MENTIONED IN PARTS 1 – 7**, PLEASE COMPLETE THIS SECTION

Q1. Please specify livestock types (e.g. deer, alpaca) _____

Q2. Please state the total number of other organic livestock (i.e. deer or goats) produced on farm, and then specify the number retained on your property and those sold from 1st July 2006 – 30 June 2007.

	Breeding stock	Stores	Finished
Total number produced from 1 July 2006 – 30 June 2007			
Number retained on farm			
Number sold as organic			
Number sold as in-conversion			
Number sold as conventional due to finishing specifications			
Number sold as conventional due to a lack of organic market outlets			
Number sold as conventional for other reason e.g. pre-cert (please specify)			
Total exported as organic			

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO OTHER LIVESTOCK SOLD AS CERTIFIED ORGANIC ONLY

Q3. Where did you sell **certified organic livestock** between 1st July 2006 and 30th June 2007?

Market Outlet	Approximate number other organic livestock sold to each market outlet	Average price per head (\$)	Which state/country was the market outlet located in?
Direct to producer			
Livestock market			
Other (please specify)			

Q4. Were the animals mostly: Grain fed Pasture fed Both

Q5. To what extent do you expect your production of **other certified organic livestock** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008) Please tick only one box.

- Significant increase (at least 10%)
- Marginal increase (up to 10%)
- Remain similar to present
- Marginal decrease (up to 10%)
- Significant decrease (at least 10%)

Q6. Between 1st July 2006 – 30th June 2007 did you buy in **other certified organic livestock** for finishing? Yes No
If yes, from state/country and how many? _____

Q7. Of the proportion of finished (other) livestock that were sold as **certified organic** between 1st July 2006 – 30th June 2007, please specify market outlet, number sold and price received:

Market Outlet	Approximate number of other organic livestock sold to each market outlet	Average price (\$/kg) received (excl. transport and commission)	Which state/country was this market outlet located in?
Producer Group			
Direct to abattoir			
Own on-farm processing unit			
Wholesaler			
Processor			
Supermarket			
Export			
Organic retailer			
Own Home Delivery Scheme			
Farmers Market			
Own Farm Shop/gate/retail outlet			
Own mail order scheme			
Other			

Q8. Please give details of any constraints or opportunities you face in developing/expanding this enterprise:

PART 9. Vegetables, Fruit, Nuts, Flowers and Seedlings

IF YOU PRODUCE **CERTIFIED ORGANIC OR IN-CONVERSION FRUIT AND/OR VEGETABLES (INCLUDING FLOWERS, NUTS, SEEDLINGS)**, PLEASE COMPLETE THIS SECTION

Q1. Please state the total **volume of vegetables, etc.** grown on farm or nursery, and then specify the volumes sold and retained on your holding 1st July 2006 – 30th June 2007 in **tonnes, kilograms, litres or numbers (please specify units)**.

Vegetable and annual crops	Total	Domestic Organic	Exported as organic	In-conversion	Non-organic	Retained for on farm-use	Seed production
Tomatoes							
Capsicum							
Alliums e.g. onion							
Potatoes							
Carrots							
Other root crops							
Lettuce							
Leafy greens, e.g. spinach							
Asian greens, e.g. bok choy							
Brassicas e.g. broccoli, cauliflower							
Cucurbits e.g. cucumber, pumpkin							
Sweetcorn							
Other vegetables							
Other vegetables							
Herbs, culinary							
Herbs, medicinal							
Nurseries, seedlings							
Nurseries, plants							
Cut flowers							
Seed production							
Other							

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Q2. Please state the total **volume of fruits, etc.** grown on farm, and then specify the volumes sold and retained on your holding 1st July 2006 – 30th June 2007 in **tonnes, kilograms, litres or numbers (please specify units)**.

Fruit and nut crops	Total	Domestic Organic	Exported as organic	In-conversion	Non-organic	Retained for on farm-use
Apples						
Banana						
Stone fruit						
Citrus fruit						
Grapes, table						
Grapes, wine						
Pears						
Olives						
Tropical fruit						
Other fruit						
Nuts						
Coffee						
Other						

Q3. Do you have/need a market outlet for seconds? Please give details

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO VEGETABLES, FRUIT, NUTS, FLOWERS AND SEEDLINGS SOLD AS CERTIFIED ORGANIC ONLY

Q4. Of the proportion of last years **fruit and vegetables that were sold as certified organic** between 1st July 2006 and 30th June 2007, please list crop sold by market outlet, volume (tonnes, kg, litres, number), price received and location. **Please use crop categories listed in Questions 1 and 2 of Part 9.**

Crops sold, e.g. brassicas, apples, potatoes, etc.	Market outlet, e.g. processor, wholesaler, farmers market, retailer, export, etc.	Volume of crop sold to each market outlet (tonnes, kg, litres, no.)	Average price (\$/volume) received for crop	Which state/country was outlet located in?

Q5. To what extent do you expect your overall production of **certified organic vegetables, fruit, etc.** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008) Please tick only one box.

Significant increase (at least 10%)

Marginal increase (up to 10%)

Remain similar to present

Marginal decrease (up to 10%)

Significant decrease (at least 10%)

Q6. Please give details of any constraints and/or opportunities you face in developing/expanding this enterprise:

PART 10. Grains, pulses, fibres and oil crops

IF YOU PRODUCE OR SELL **CERTIFIED ORGANIC OR IN-CONVERSION GRAINS, PULSES, FIBRES OR OIL CROPS**, PLEASE COMPLETE THIS SECTION

Q1. Please state the **total volume of grains, pulses, fibres and oil crops** grown on farm, and then specify the volumes sold and retained on your holding from 1st July 2006 to 30th June 2007 in **tonnes**.

Crops	Total	Domestic Organic	Exported as organic	In-conversion	Non-organic	Retained for on farm-use	Seed production
Milling wheat							
Feed wheat							
Milling barley							
Feed barley							
Feed oats							
Milling oats							
Feed corn							
Milling Corn							
Rice							
Other grains for human use							
Other grains for feed							
Peas							
Beans							
Soybean							

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Other pulse crops							
Canola							
Cotton							
Olive oil							
Sunflower/ safflower oil							
Peanut oil							
Other oil crops							
Sugar cane							
Other field crops							

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO GRAINS, PULSES, FIBRES AND OIL CROPS SOLD AS CERTIFIED ORGANIC ONLY

Q2. Of the proportion of last years grains, pulses, fibres and oil crops *that were sold as certified organic* between 1st July 2006 and 30th June 2007, please list crop sold by market outlet, location, price and volume (tonnes, kg, litres).

Please use crop categories specified in Question 1 of Part 10.

Crop sold, e.g. wheat, sugar cane, olive oil, etc.	Market outlet? e.g. flour mill, processor, feed mill, export	Volume of crop sold to each market outlet (tonnes, kg, litres)	Average price (\$/volume) received for crop	Which state/country was this market located in?

Q3. To what extent do you expect your overall production of **certified organic grains, pulses, fibres and oil crops** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008) Please tick only one box.

- Significant increase (at least 10%)
- Marginal increase (up to 10%)
- Remain similar to present
- Marginal decrease (up to 10%)
- Significant decrease (at least 10%)

Q4. Please give details of any constraints and/or opportunities you face in developing/expanding this enterprise:

PART 11. Honey

IF YOU PRODUCE OR SELL **CERTIFIED ORGANIC OR IN-CONVERSION HONEY**, PLEASE COMPLETE THIS SECTION

Q1. Please state the total amount of certified organic honey produced in your bee-hive area between 1st July 2006 – 30th June 2007.

	Amount (kg)	Average price (\$/kg)	Which state/country was this market outlet located in?
Total amount produced from 1st July 2006 – 30th June 2007			
Amount sold as organic			
Amount sold as in-conversion			
Amount sold as conventional due to a lack of organic market outlets			
Amount sold as conventional for other reason e.g. pre-cert (please specify)			
Amount exported as organic			

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO HONEY SOLD AS CERTIFIED ORGANIC ONLY

Q2. To what extent do you expect your production of **certified organic honey** to change over the next financial year? (i.e. between 1st July 2007 – 30th June 2008). Please tick only one box.

Significant increase (at least 10%)

Marginal increase (up to 10%)

Remain similar to present

Marginal decrease (up to 10%)

Significant decrease (at least 10%)

Q3. Please give details of any constraints or opportunities you face in developing/expanding this enterprise:

PART 12. Aquaculture

IF YOU PRODUCE OR SELL **CERTIFIED ORGANIC OR IN-CONVERSION FISH OR CRUSTACEA**, PLEASE COMPLETE THIS SECTION

Q1. Please state the total amount of organic fish or crustacea produced in your aquaculture system between 1st July 2006 – 30th June 2007.

	Amount (tonnes or kg)	Average price (\$/kg)	Which state/country was this market outlet located in?
Total amount produced from 1st July 2006 – 30th June 2007			
Amount sold as organic			
Amount sold as in-conversion			
Amount sold as conventional due to a lack of organic market outlets			
Amount sold as conventional for other reason e.g. pre-cert (please specify)			
Amount exported as organic			

Q2. Please specify different types of fish or crustacea you produced/stocked as a percentage of total amount between 1st July 2006 – 30th June 2007.

Type (e.g. trout, marron)	Percentage (%) of total production

ALL FURTHER QUESTIONS IN THIS SECTION REFER TO FISH SOLD AS CERTIFIED ORGANIC ONLY

Q3. To what extent do you expect your production of **certified organic fish or crustacea** to change over the next financial year? (i.e. between 1st July 2007 – 30th June 2008). Please tick only one box.

- Significant increase (at least 10%)
- Marginal increase (up to 10%)
- Remain similar to present
- Marginal decrease (up to 10%)
- Significant decrease (at least 10%)

Q4. Please give details of any constraints or opportunities you face in developing/expanding this enterprise:

SECTION C. Organic abattoirs

Q1. Please give a breakdown of certified organic and in-conversion throughput (head) at your abattoir between 1st July 2006 – 30th June 2007.

	Throughput of certified organic & in-conversion animals (head)		Annual change in the past financial year (2006-07) (% change)	
	Organic	In-conversion	Organic	In-conversion
Pigs				
Lambs				
Beef cattle				
Goat				
Table poultry				
Other				

Q2. Please estimate the percentage of certified organic animals slaughtered that were sourced from different states in Australia and from overseas countries between 1st July 2006 – 30th June 2007).

Sourced in Australia		Beef cattle	Lamb	Pigs	Poultry, table	Goat	Other
ACT	Organic						
	In-conversion						
NSW	Organic						
	In-conversion						
NT	Organic						
	In-conversion						
QLD	Organic						
	In-conversion						
SA	Organic						
	In-conversion						
TAS	Organic						
	In-conversion						
VIC	Organic						
	In-conversion						
WA	Organic						
	In-conversion						
Sourced overseas (please specify country)		Beef cattle	Lamb	Pigs	Poultry, table	Goat	Other
	Organic						
	In-conversion						
	Organic						
	In-conversion						
	Organic						
	In-conversion						

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SECTION D. Organic retailers and wholesalers

Are you a: Retailer (incl. home delivery) Wholesaler

Q1. Please provide a breakdown of total sales/production of certified organic and in-conversion products 1st July 2006 – 30th June 2007

Product category	Certified organic domestic sales value (\$/year)	Certified organic export sales value (\$/year)	Certified organic total sales value (\$/year)	Source of certified organic product e.g. wine (please specify state or country)	Sales outlet e.g. retailer, consumer, processor (please specify outlet type)	Annual % change in the previous year (06-07)
Babyfoods						
Bread & baked goods						
Beverages, non-alcoholic						
Beverages, alcoholic excl. wine						
Wine						
Milk						
Yoghurt						
Other dairy products						
Meat						
Fish						
Fruit/veges, fresh						
Fruit/veges, processed						
Milling, cereals						
Pasta, noodles, etc.						
Ready meals and chilled foods						
Snack foods and confectionery						
Sauces, oils, condiments, etc.						
Honey						
Wholefoods						
Health and beauty (cosmetics)						
Textiles, wool, cotton, etc.						
Other						
Other						
Other						
TOTAL						

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SECTION E. Organic processors, manufacturers and importers

Are you a: Processor (incl. repacking) Manufacturer Importer

Q1. Please estimate the percentage of total certified organic produce sourced from Australian states and overseas countries from 1st July 2006 to 30th June 2007 for each of the following ingredients used. (Please do not include further processed products, e.g. prepared leafy salads).

Category	Product	ACT	NSW	NT	QLD	SA	TAS	VIC	WA	Overseas (please specify country)
Meat	Beef									
	Lamb									
	Chicken									
	Eggs									
	Pork									
	Bacon/ham									
	Goat									
Fish	Fish									
Dairy	Milk									
	Butter									
	Cheese									
	Cream									
	Yoghurt									
Vegetables	Asparagus									
	Beans, peas									
	Broccoli									
	Cabbage									
	Capsicums									
	Carrots									
	Cauliflower									
	Cucumbers									
	Lettuces									
	Mushrooms									
	Onions									
	Potatoes									
Tomatoes										

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Q1. **CONTINUED** Please estimate the percentage of total certified organic produce sourced from Australian states and overseas countries from 1st July 2006 to 30th June 2007 for each of the following ingredients used.

Category	Product	ACT	NSW	NT	QLD	SA	TAS	VIC	WA	Overseas (please specify country)
Fruits	Apples									
	Pears									
	Citrus									
	Bananas									
	Soft fruit									
	Stone fruit									
	Dried fruit									
	Nuts									
	Grapes, wine									
	Grapes, table									
Cereals and pulses	Wheat									
	Barley									
	Oats									
	Corn									
	Rice									
	Soybean									
	Peas									
	Beans									
Oil crops	Olive oil									
	Peanut oil									
	Sunflower oil									
Other field crops	Sugar cane									
	Cotton									
Other										
Other										

Q2. To what extent do you expect your sales of **certified organic products** to change over the next year? (i.e. between 1st July 2007 – 30th June 2008). Please tick only one box.

- Significant increase (at least 10%)
- Marginal increase (up to 10%)
- Remain similar to present
- Marginal decrease (up to 10%)
- Significant decrease (at least 10%)

Q3. Please give details of any constraints or opportunities you face in developing/expanding this enterprise:

SECTION F. General comments

Please feel free to make any further comments about the issues raised in this survey or any related matter. Feedback on the survey itself is also appreciated, including ideas for future surveys on the organic market.

Contact details (optional)

In order to be in the draw for the prize of an annual subscription to the new trade magazine, *Australian Certified Organic Magazine* and the *Clean Food Organic* book, please provide your contact details in the space provided below. Note that this is optional and your contact details will be treated with strictly confidentiality.

Address _____ Business Phone _____

_____ Mobile Phone _____

_____ Email _____

***Thank you for completing the
2006-07 Australian Organic Market Report Survey.***

Your time and effort is greatly appreciated!

Please place the survey in an envelope and mail it to the Reply Paid address. No stamp is required.

**REPLY PAID 61883 (Agronomy)
Organic Market Survey
University of New England
NSW 2351**

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