



Organic Industry Data Collection *Report 2022*



Australian Government

**Department of Agriculture,
Water and the Environment**



Contents

The Brief	3
<hr/>	
Introduction	4-6
Sample Composition	5
Methodology	6
<hr/>	
Executive Summary	7-14
Key Highlights and Insights	12
Market Size Estimate	13
Opportunities and Recommendations	14
<hr/>	
Main Report	15-41
<hr/>	
Contact Details	45
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The Brief

The Department of Agriculture, Water, and the Environment (the department) is trying to gauge the number and nature of organic operators in Australia, including uncertified and smaller producers.

Areas for investigation are subject to further discussions but may include:

1. Distribution by size, location, and turnover
2. Why do some producers get certified while others don't?
3. Whether uncertified or small operators would see any benefit in a mandatory certification scheme, and
4. Insights into market trends, volumes, percentile of commodity groups, and market segments.

Priorities

1. Operation - Gain an understanding of the uncertified sector
2. Certification - Understand how industry interpret/apply organic and certification
3. Smaller production



Introduction

In December 2021, KG2 contacted a sample of 358 certified and uncertified organic farmers/producers and processors. Organic producers and processors were from NSW, VIC, QLD, SA, WA, TAS, and the NT.

There was a considerable overlap between types of production and between producers and processors. This resulted in a sample of 358 that included 325 producers and 127 organic processors. The distribution of these by type is shown below compared to the quotas.

	Quota	Achieved
Producer/ Farmer		
Horticulture	100	211
Grapes	50	70
Livestock	41	100
Dairy	25	25
Grain	17	22
Poultry	17	22
Total Producer/Farmer	250	325
Processors	100	127
Overall Total	350	358

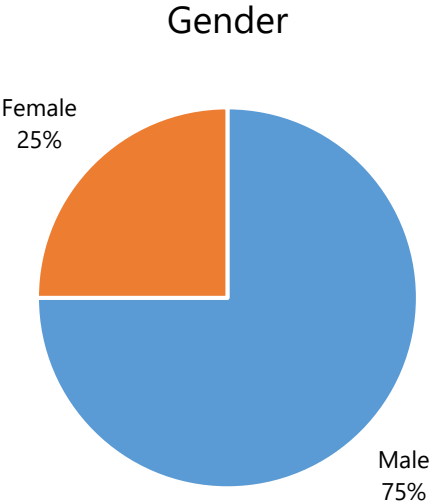
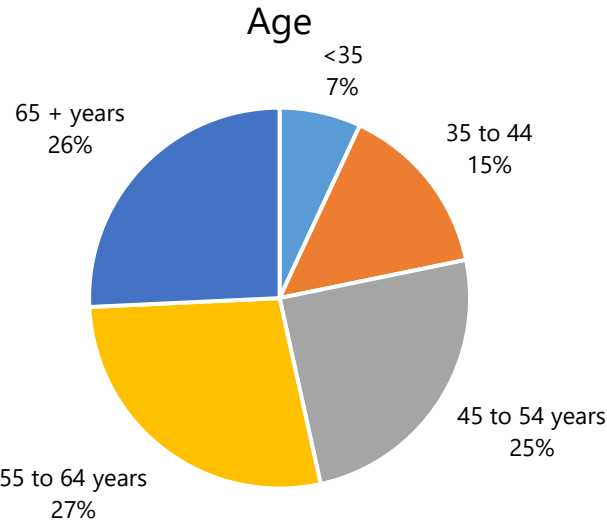
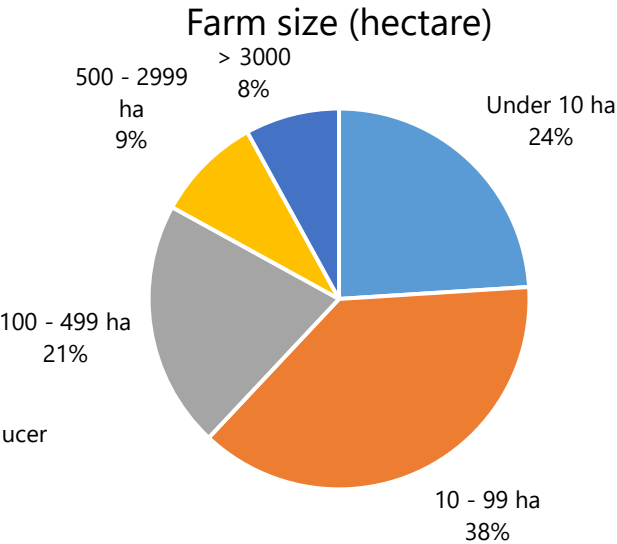
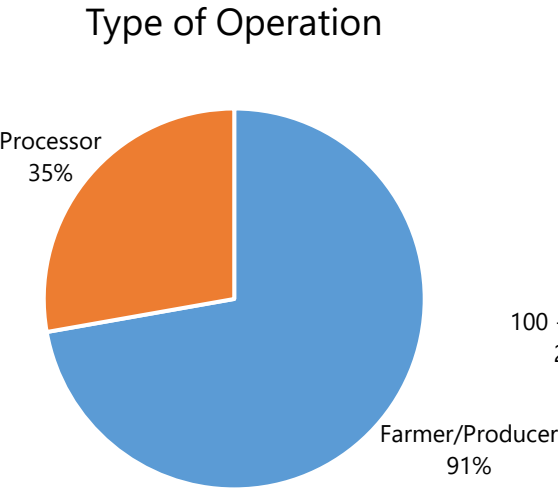
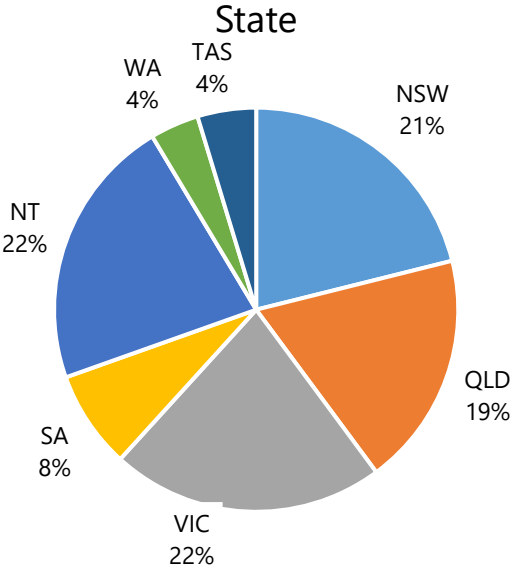
During the survey, KG2 spoke to an additional 237 respondents who were prepared to do the study but did not produce or process organic products. Whether they had considered organic production or processing and reasons why they currently weren't organic was recorded. An overview of the responses is provided on page 39 of this report, and the raw data has been provided for AWE.

Interviewer feedback

This was a very popular study amongst operators as organic producers/processors were generally passionate about what they were doing and interested in participating in the study.

Operators found that most organic producers were proud of their operation and more than happy to share their opinions on the subject. Many involved in the sector regarded it highly and were often proud to be implementing organic practices in their production model.

Sample Composition





Methodology

KG2 owns and manages Australia's most comprehensive agriculture database which enabled access to a list of organic operators.

All calls were made from KG2's in-house call centre using a CATI (computer-assisted telephone interviewing) system by trained and experienced interviewers. The interviewers are almost exclusively university agricultural graduate and post-graduate students. As a result, they have knowledge and understanding that enables them to create rapport with the sector, communicate well and probe responses appropriately.

Data analysis, output and reporting were all completed in-house at KG2.



Executive Summary

Overall organic operations

- 358 organic operators were surveyed. Farmers/producers made up 91% of the sample (325 respondents). A total of 127 respondents (35%) were involved in processing or other non-farming organic operations.
- There was a considerable overlap of roles, with more than a quarter of respondents being both a farmer/producer and processor.
- Almost two-thirds (62%) of respondents involved in organic operations were organically certified.
- 25% of respondents involved in organic operations were female.

Products Organically Produced or Grown

- The top four most organically produced products were vegetables (29%), fruit (23%), grapes for wine (21%), and beef (19%). However, a wide range of organic products were produced, including nuts, tea tree/tea tree oil, honey, and wool.
- Horticulture was the organic production type, involving the largest proportion of both producers (29%) and processors (21%). This represented 43% of certified horticulture producers and 33% of certified horticulture processors.

Reasons for growing organically

- The survey uncovered various reasons why farmers grow organically, none of which were mentioned by more than 20%, which indicates each respondent's decision to grow organically was motivated by various reasons.
- Nevertheless, the most mentioned reason why farmers/producers said they grow organically was that it is better for the environment (20%), followed by the absence of synthetic chemicals or additives (14%), and 13% said they grow organic because it is more profitable/ higher value.

Product types organically processed.

- Whilst there was a slight difference in the proportion of products processed organically compared to grown, the top three products were the same. This is in line with many farmers/producers indicating that they produced and processed their organic products. The top organically processed products included grapes for wine (29%), followed by fruit (22%) and vegetables (22%).
- Only 9% of processors processed beef, considerably less than the 19% of producers who organically produced beef. This may suggest fewer, more specialised beef processing operations.
- 82% of organic processing reported in SA was contributed to grapes (wine), reflecting the strong grape (wine) produce from that state.

Reasons for producing organically

- The main reasons for processing organically were similar for producers and processors. However, being more profitable was the top reason amongst processors (third for producers).

Executive Summary (continued)

Definition of organic

- The majority (89%) of organic operators defined organic as the environmental maintenance and enhancement without synthetic fertilisers and chemicals. The following most mentioned definitions were the conservation of energy, soil, and water (36%), and recognition of livestock welfare needs (26%).

Current operations

- Most sales of organic goods were domestic, with 60% of respondents supplying organic goods to retailers and 58% selling organic products directly to consumers. International sales and exporting organic goods directly to any overseas markets were undertaken by only an average of 10% of respondents. Processors had the highest proportion (28%) who exported goods to overseas markets.
- In line with their roles within the supply chain, a greater proportion of processors were supplying organic goods to retailers (77%) or selling directly to consumers (75%), compared to farmers/producers.
- Uncertified organic operators were more likely to have sold directly to consumers (71%) than those who were certified organic (50%). This is likely to reflect a preference for retailers to have certification from their organic suppliers.
- Certified operators were more likely than uncertified operators to supply organic goods to retailers (63%), organic processors (57%), exporters (38%) and to export directly to overseas markets (17%).

Future operations

- Respondents were generally optimistic about the future. Those who were certified organic were the most likely to expect to increase the supply of organic goods to retailers (52%), supply goods to organic processors (45%), and supply goods to organic exporters (37%).
- In comparison, 58% of those who were not certified expect an increase in sales directly to consumers, compared with only 43% of certified organic operators.
- Across Australia, only 15% of respondents exported goods directly to overseas markets. However, a significantly higher proportion (42%) of South Australian respondents were already exporting to overseas market

Non-organic business operations practices and segregation practices

- Overall, 40% of respondents had an operation that involved products that were not organic, with the same incidence whether uncertified or certified organic. More processors (67%) operated a parallel model than farmers/producers (56%). A slightly higher proportion of certified respondents ran a parallel model (62%) than those not certified (55%).
- On average, 45% of each business with a parallel model was organic. When asked if the organic and non-organic operation was separated, 93% of certified respondents separated, whilst only 50% of non-certified organic separated their operations. This was by far the greatest difference between certified and uncertified respondents for these measures.
- For those who separated their operations, the most common segregation methods were different growing locations (32%), clear identification/record-keeping (26%), strict cleaning procedures (24%), and different production areas (24%).

Executive Summary (continued)

Annual volume, gross value, and size of organic production

- More than a third of respondents could not recall their organic production's annual volume and gross value.
- Most respondents estimated their annual production volume was fewer than 25 tonnes.
- An annual gross value between \$100,000 - \$499,000 accounted for the greatest proportion of respondents, farmers/producers, processors, and certified or not certified. There were only a handful of respondents from large volumes and high-value operations.
- Overall, 68% of respondents described their operation as small, 24% as a medium, and only 8% as a large operation.

Cost of having an organic operation

- Most respondents (65%) consider it more expensive to be an organic farmer.
- Those who were certified organic (69%), and processors (72%) considered it more expensive to be an organic farmer than 59% of those who were not certified and 63% of farmer/producers.

Length of organic production

- More than 80% of farmer/producers, processors and certified organic operators had produced organic products for at least five years.
- However, fewer (73%) of those not organically certified had produced organic products that were newer to the sector.

Expect an increase or decrease in organic production.

- In general, respondents were optimistic about the future of their organic production, with 60% expecting an increase in their level of organic production in the next five years. No more than 7% of respondents expected a decrease in production in the next five years.
- Processors were a little more likely to expect an increase (66%) than farmers (60%).
- Respondents indicated they were expecting an increase in their organic operation because they had expanded their business or production. In addition, respondents indicated that they expect an increase in organic production because of increased demand/awareness of organic products.
- The main reasons why respondents were expecting a decrease in their organic production were because they were heading into retirement, they were getting too old, or they were downsizing their production.

Knowledge of organic certification requirements

- Operators rated their knowledge of organic certification requirements on a 1-10 scale.
- Those who were organically certified rated their knowledge of organic certification requirements much higher (74% rated it at 8 or more out of 10) than those who were not certified (only 30% gave an 8+/10).

Executive Summary (continued)

Organic certification

- Almost two-thirds (62%) of respondents involved in organic operations were organically certified.
- The concentration of certification was considerably higher in QLD (74%) and NSW (67%) than in other states (50%-55%). The lowest level of certification was in SA/NT (50%), with 3% not knowing. A higher proportion (64%) of male respondents were certified organic than 54% female respondents.
- Just over half of farmers/producers and processors operate under the National Standard for Organic and Bio-dynamic Produce. In contrast, 34% of farmers/producers and 35% of processors operate under the Australian Standard AS6000:2015. Around 1 in 5 did not know their certifying body.
- Only around 1% of farmers/producers and processors were certified 'in-conversion'.

Length of organic certification

- The average number of years of organic certification was 12. The average time farmers/producers had been certified was 12 years, whilst the average for processors was 13 years of organic certification.
- The survey results indicated that the certified organic industry is relatively young.

Reasons for organic certification

- The top three reasons for farmers/producers being certified were to improve marketing (43%), provide assurance of product to domestic consumers (37%), and improve sales (37%).
- For those involved in processing, the main reasons for being certified were to provide assurance of product to domestic consumers (42%) and improve marketing (33%). To improve sales was only mentioned by 25%.

Business costs of organic certification

- The main business cost of organic certification was preparation for audits, with 49% of processors and 47% of farmers mentioning this cost.
- Certification fees were also the main business cost, mentioned by a slightly higher proportion of farmers/producers (40%) than processors (36%).
- Paperwork and filing were noted as costs by 34% of processors and 27% of farmers/producers.

Uncertified organic operators

- 13% of farmer/producers and 9% of processors who are currently not organically certified had been certified in the past.
- The main reason farmers were not certified was because of the cost of certification. For processors, the main reason was that there was no benefit in terms of sales or profit.

Executive Summary (continued)

Benefits of producing organically

- There were many benefits to producing organically mentioned by respondents.
- The top three benefits, mentioned in close to equal proportions, were a healthier product for consumer/community safety (23%), environmental health/benefit/the environment (23%), and consumers like/want/trust products/market demand (22%).

Issues faced when producing organically.

- Weeds, the control of weeds and a lack of herbicide options was the most common issue, faced by 21% of respondents when producing organically. Slightly more (24%) of certified organic respondents mentioned weed control as the main issue compared with only 10% of those who were not certified.
- Labour (e.g., costs, intensiveness, lack of available labour) was the second most common issue faced by organic operators.

Compulsory certification

- 69% of certified operators and a surprisingly high 45% of those uncertified agreed that a compulsory certification scheme/regulation would be useful.
- The top reason across all respondents for having compulsory organic certification was that it will reduce fake organic activity (27%) and a belief that if you claim to be organic, you should be certified (18%).
- These responses were consistent for producers/processors and certified or not certified. However, non-certified operators were more likely than others to suggest it should be up to the individual and indicated concern that it would increase fees for producers.
- There seems to be an opportunity to increase certification substantially by encouraging those who are uncertified, but supportive of compulsory certification, to convert. As cost of certification is an issue, this may be a stumbling block for some, even if they support compulsory certification.

Products that would benefit from organic certification

- Honey was the product that the highest percentage (70%) of all respondents agreed would benefit from organic certification. This was followed by cosmetics (62%) and household cleaners (58%).
- For all products, there was always a lower proportion of non-certified organic respondents who thought products would benefit from organic certification than those who are organically certified.

Non-organic operators

- KG2 spoke with 237 additional respondents who were not organic, so not eligible for the survey but interested in participating.
- When asked if they had considered organic production, 19% of respondents indicated they had considered organic operations.
- Equally, 19% of respondents indicated they had not considered organic or were not interested.
- The main reason respondents were not organic was because there was no money in it (17%).

Key Highlights & Insights

- Many organic operators were involved in various stages of the supply chain. More than a quarter were both a farmer/producer and a processor.
- In this organic industry study, 25% of respondents were female.
- Vegetables, fruit, grapes (for wine) were the leading organic products produced and processed.
- Almost two-thirds (62%) of respondents involved in organic operations were organically certified.
- Organic operators chose to be organic for a variety of reasons. The main reasons include that they are concerned with the environment, organic is more profitable, and due to the absence of synthetic pesticides. A greater proportion of processors chose organic operations because they consider it more profitable compared to farmers/producers.
- The main reasons growers had not become organically certified was the cost of certification (30%) and no sales or profit benefit (27%). For processors, the top reasons not to be certified were no financial or sales benefit (37%), cost of certification (29%), and it is too restrictive (29%).
- The certifying body for 76% of farmers/producers and 74% of processors was the Australian Certified Organic (ACO).
- Most organic products were sold domestically, directly to retailers or consumers. Exporting directly to overseas markets was dominated by processors (28%) and those organically certified (17%) but by only 12% of farmers.
- 71% of those not organically certified supplied organic products directly to consumers, considerably more than the 50% who were certified. Those certified were above average suppliers to organic processors (57%) and exporters (36%), while 63% supplied goods to retailers.
- Respondents were generally optimistic with organic growth, with 60% of growers and 66% of processors expecting an increase in their level of organic production in the next five years.
- The cost of certification is a constraint to organic production. Certification cost was one of the main business costs of being organically certified, and it was the main reason organic operators were not certified.
- Organic farming is considered to be more expensive, particularly by those who are certified organic and those who are involved in processing organic products.
- By their own definition of small, medium, or large, most organic operators (65%) consider themselves a small operation.
- Operating a parallel model is common for those who produce organic and non-organic products. Non-certified operators were less likely than certified respondents to follow good practices to segregate their organic products.
- Generally, the support for a compulsory certification scheme was high, even by respondents who were not certified currently. Compulsory certification was supported by 69% of the certified operators and 45% of uncertified respondents.
- The control of weeds and the lack of herbicide options was the most common issue faced by respondents.

Estimate of Market Size

- The Australian Organic Market Report 2021 estimates that there are 4,178 certified organic operations.
- However, this does not account for uncertified organic producers.
- The main KG2 database houses around 6300 records or organic producers which, after excluding the 4178 known certified producers (66%), leaves an estimated 2122 who are uncertified (34%).
- Hence, the 62% certified and 38% uncertified found in the survey seems totally within reason.
- The proportion uncertified in the survey may have actually been higher if we had sourced contacts from KG2's separate database of smaller (hobby) farms that includes small organic growers, many of whom may not be certified.

Estimated Organic Market Size	%	Number
Certified Organic Operators*	66%	4178
Estimated Uncertified Organic Operators from KG2 Database	34%	2122
Estimated Total Organic Operators from KG2 Database	100%	6300

*Australian Organic Market Report 2021 **KG2 Database

Opportunities & Recommendations

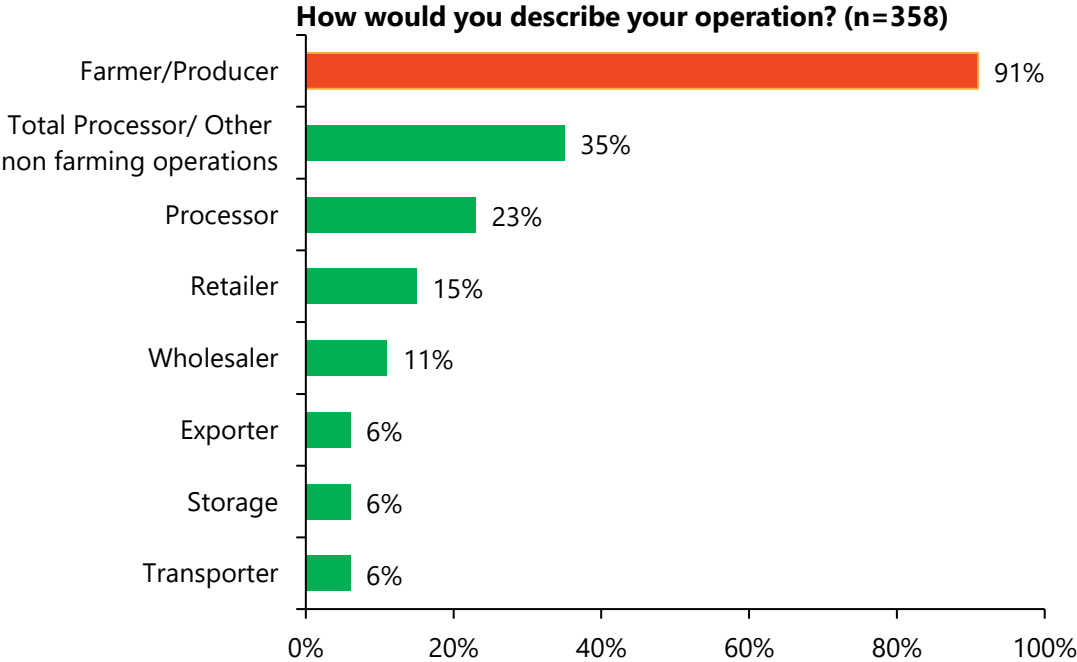
- The survey suggests that a national standard could benefit the industry due to the number of different certifiers and standards of operation, varied levels of knowledge about certification requirements and an apparent lack of motivation for many to become certified.
- There is a substantial opportunity to increase organic certification by encouraging those who are uncertified yet supportive of compulsory certification to become certified.
- There may be an opportunity to encourage a parallel model with certification applied to an organic section that operates alongside traditional farming rather than expecting an operation to be one or the other.
- Weed control for organic farmers is an important issue that warrants further investigation. Areas to explore include how organic producers manage the issue, how much of a deterrent is it, where they get support, information and product advice and what new methodologies are there to manage their weeds.
- There is opportunity to build awareness of the organic market through digital communications and education. Maintaining producers in a database platform provides a new communication channel direct to farm to communicate organic news and opportunities.
- Further research into market access for organic operators may be valuable, particularly around export markets for both organic producers and processors.
- There is a strong organic viticulture market in South Australia concerned with domestic production and international export. South Australia would be a good test case for a national certification scheme roll out.
- Overall, there was a positive view of the future of the organic industry. However, to track the reality of their optimism and the movement in the market, a longitudinal study to track the industries views, expectations and requirements over time is required.
- The organic market is made up primarily of smaller operators and the number of organic operations is growing. The sector needs to build and maintain a comprehensive database of organic, both certified and uncertified operators in Australia.
- There are opportunities to build and expand the organic grain market. There are a large number of grain farmers (23,000) and livestock producers (50,000) but there is comparatively low organic presence in these sectors. Engaging them to consider organic production potentially provides a significant business opportunity.
- Capturing of data in a blockchain environment for the whole organic process (i.e., chemical diaries, weaning, vaccinations, pick date pack date) is an emerging opportunity. An organic certified producers' data base platform can be integrated with block chain to maintain monitor organic compliance and the ability to weed out counterfeits.
- By encouraging more industries to develop organically (food, cosmetics, pet food, cleaning products etc.) and to require certification to promote organic items, there would be more choices for consumers and organic options would become more recognised, available and expected.



Detailed Report

Overall organic operations

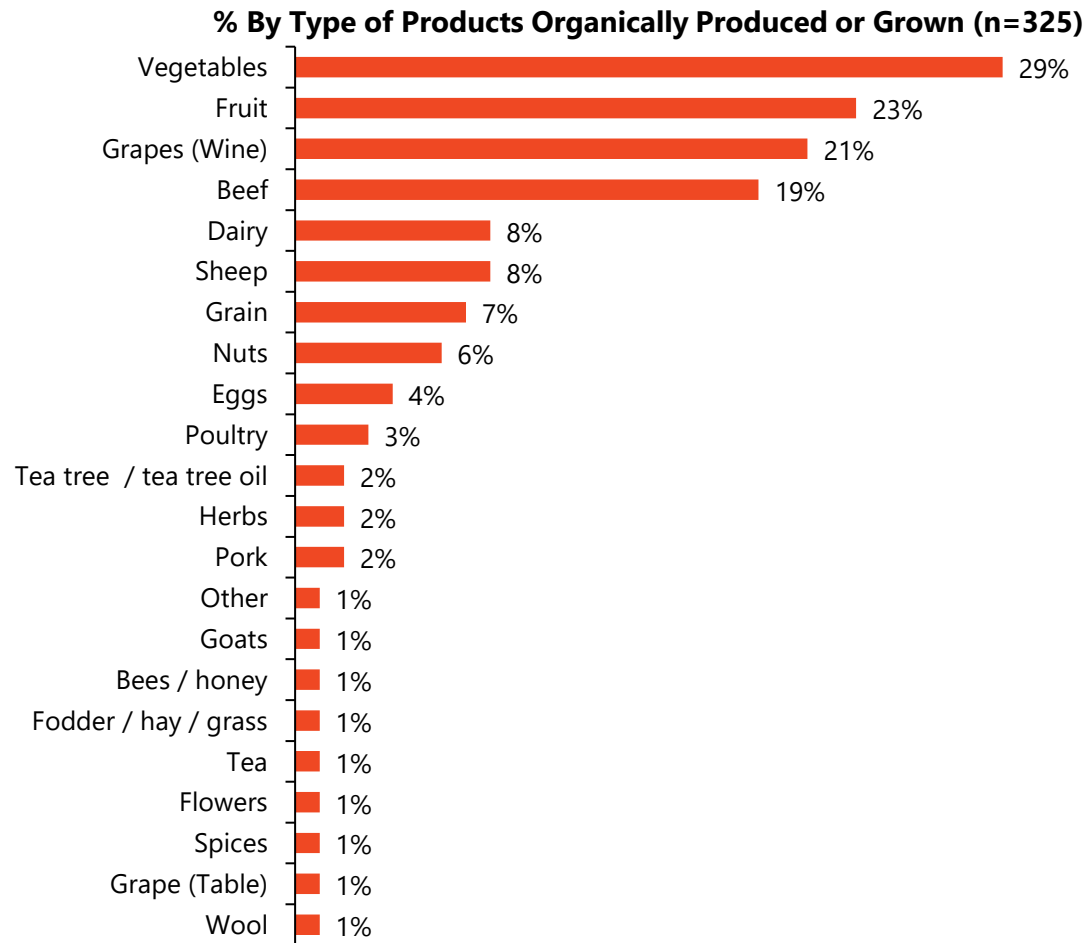
- A total of 358 organic operators were surveyed.
- Farmers/ producers made up 91% of the sample (325 respondents).
- A total of 127 respondents (35%) were involved in the processing or other non-farming operations of organic goods.
- Only 6% of Australian organic operations described themselves as exporters, however SA deviated significantly from the national response with 18% of respondents identifying as an exporter (Figures for states available in the cross tabs and raw data).
- There was an overlap, with more than a quarter of respondents being farmers/producers and processors.
- For this report, the processor category includes processors, retailers, wholesalers, exporters, storage and transporters, unless otherwise stated.



Q1. How would you describe your operation? (n=358)

What are farmers/ producers producing organically

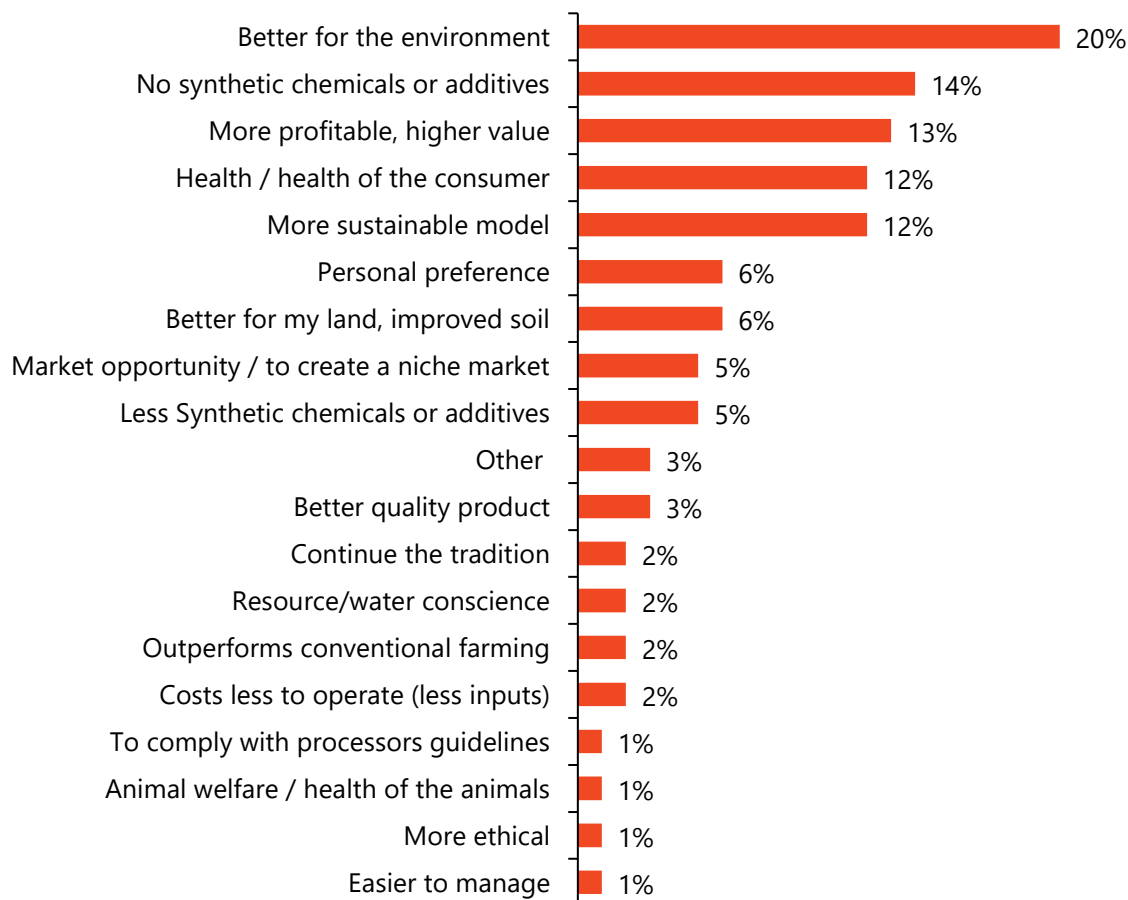
- Many products were produced organically, from vegetables, grapes for wine to dairy products, nuts, bees and tea.
- However, organic vegetables, fruit, grapes and beef were by far the main products produced with dairy and other products reported by less than 10% of processors.
- QLD and TAS both recorded significantly higher proportions of fruit growers at 38% and 53% respectively.
- The second highest proportion of organic produce was seen in the viticulture industry with 21% of national respondents producing organic grapes (wine). This statistic was fueled predominantly by SA and VIC, with SA grapes (wine) contributing to 69% of the states reported organic produce.



Why are farmers growing organic?

- There were various reasons why farmers grow organically, with no single reason reported by more than 20% of respondents. This suggested that the decision to grow organically has a range of motivations.
- The main reason farmers gave for growing organic was that organic farming is better for the environment (20%).
- Other common reasons (although only by 13-14%) included the absence of synthetic chemicals or additives and that organic farmers considered growing organically to be more profitable higher value.

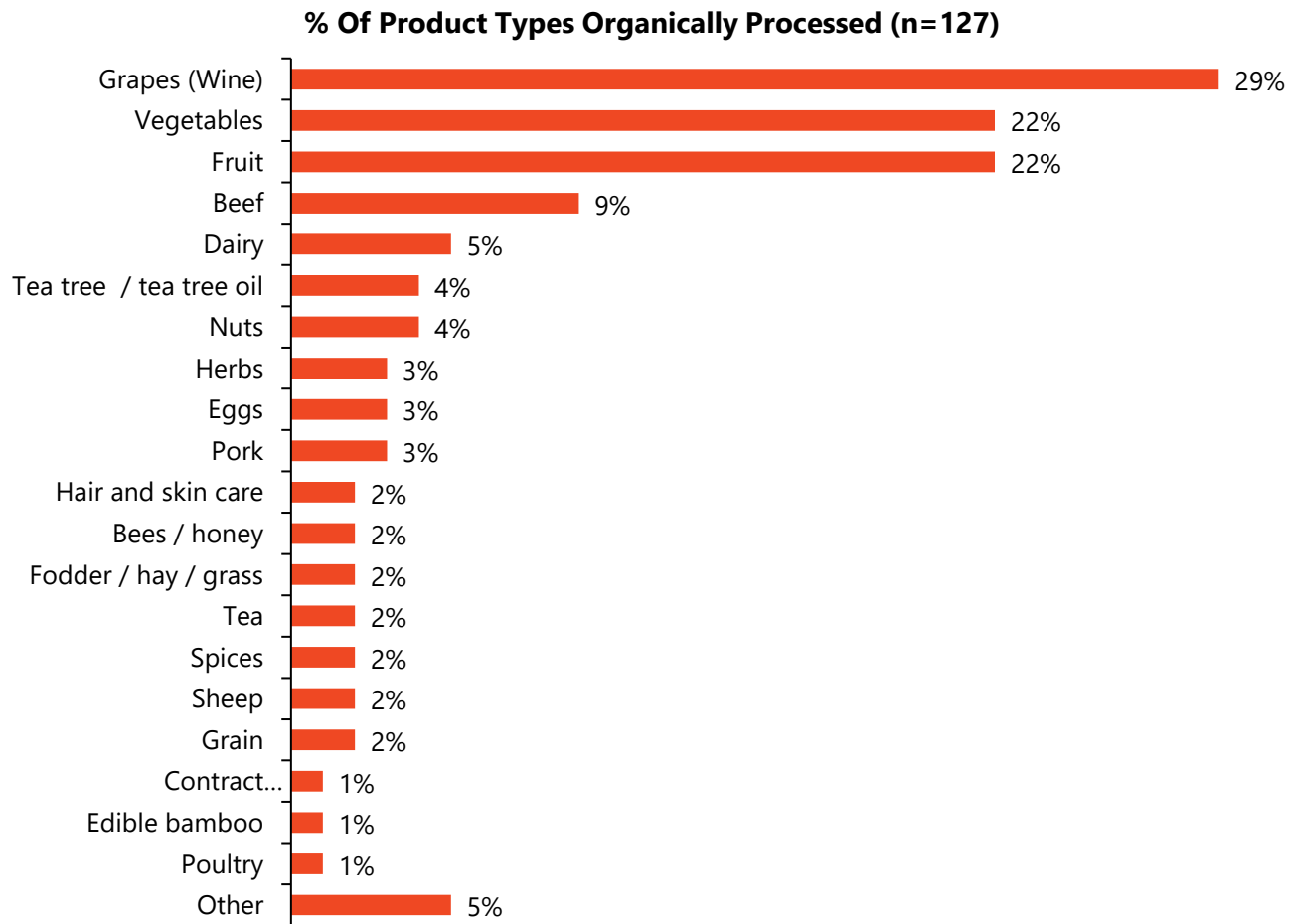
Reason for Growing Organically (n=325)



Q7A. What is the main reason that you grow or grew organic?

What are processors processing organically

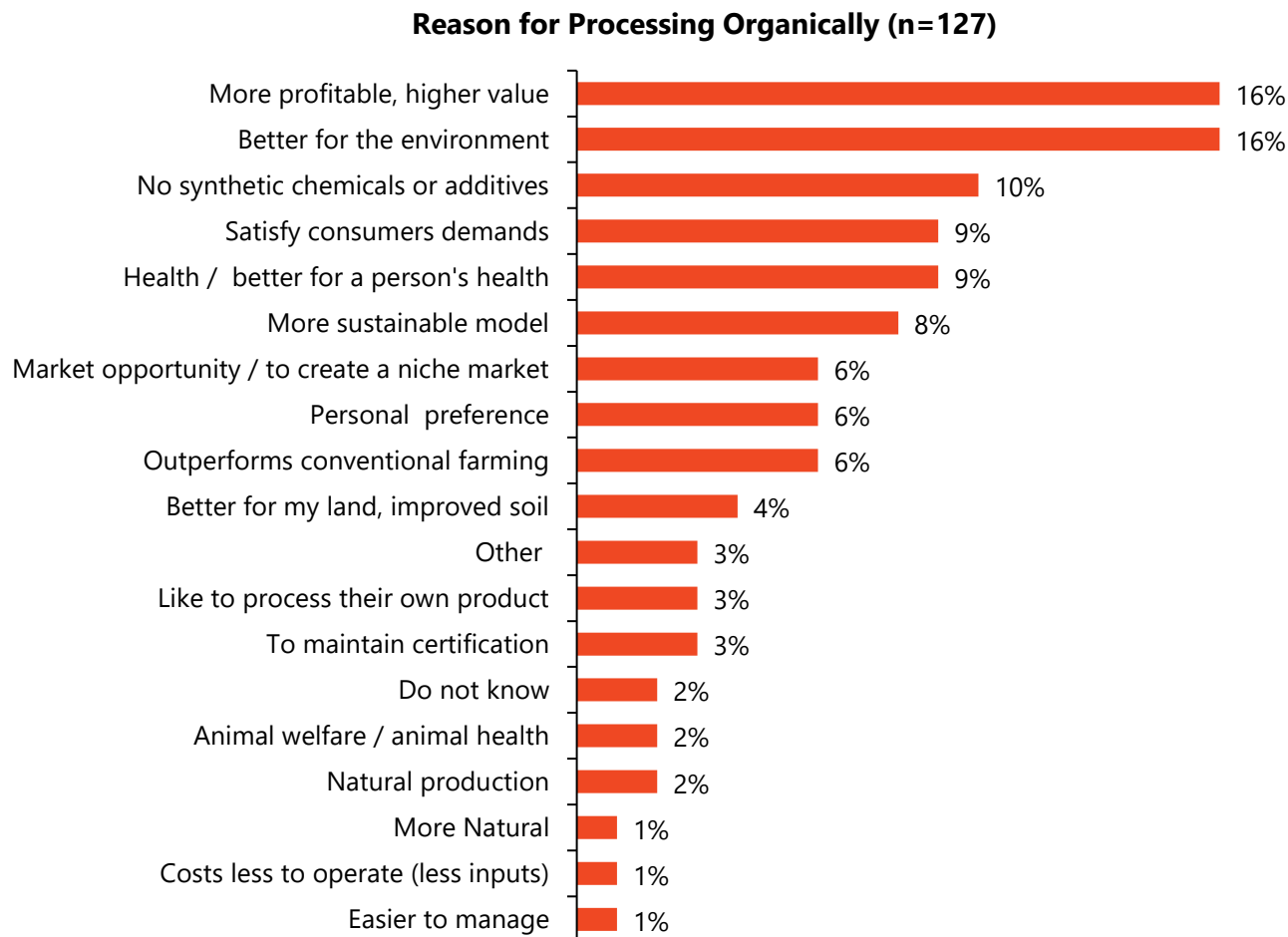
- A wide range of organic products were processed.
- Grapes, fruit and vegetables were by far the main products processed, similar to the incidence of organic products produced/ grown. Livestock and other products were reported by less than 10% of processors.
- 82% of organic processing reported in SA was contributed to grapes (wine), reflecting the strong grape (wine) produce from that state (Available in attached datasets).



Q3B. What organic products did you process?

Why are processors operating organically?

- While only 13% of farmers/producers chose organic farming as it was more profitable, it was the top reason (although only 16%) that processors processed organic products.
- Like producers, processors also operated organically because it is better for the environment and has no synthetic chemicals or additives.
- Interestingly, 9% of processors said their reason for having an organic operation was to satisfy consumers demands. This was not mentioned as a reason by farmers/producers and may reflect the higher level of direct contact with customers by many processors.

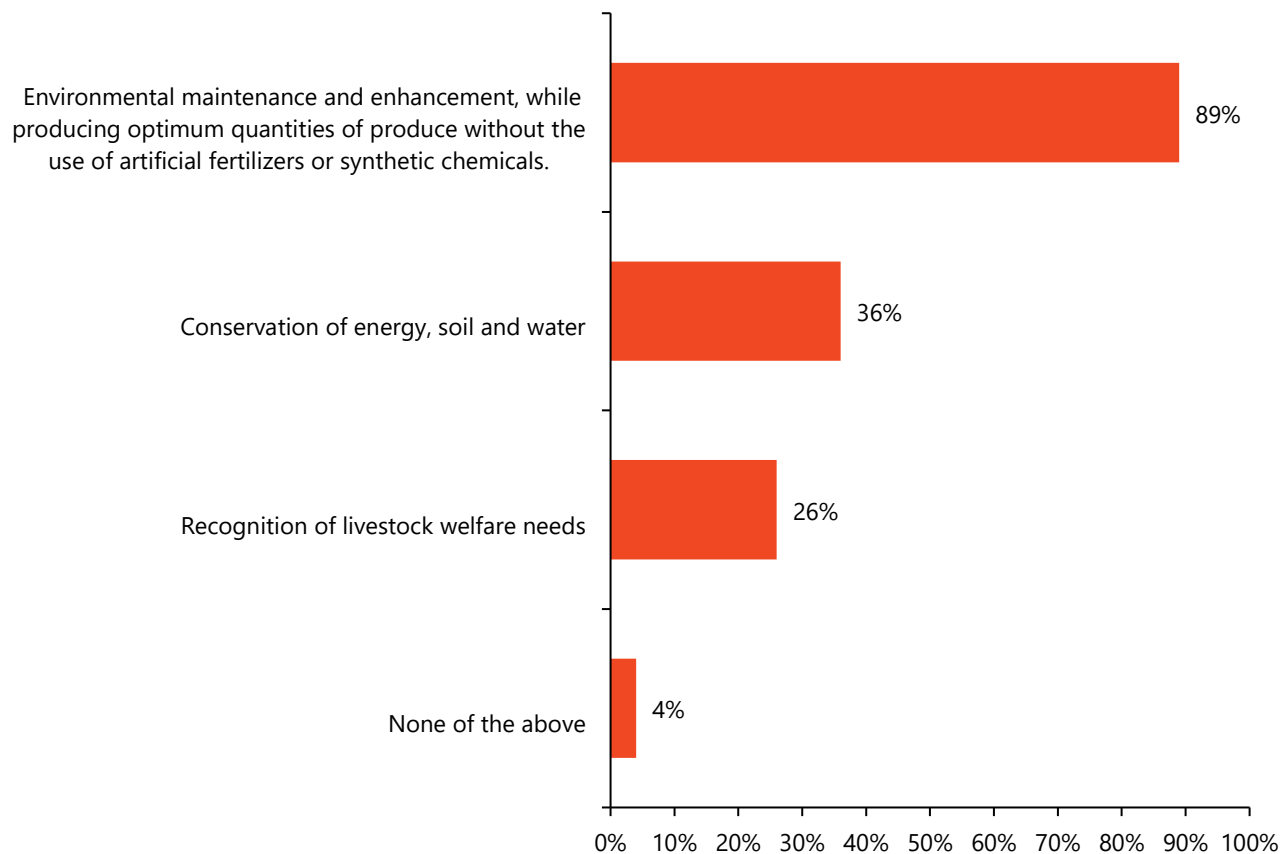


Q7B. What is the main reason that you operate organic processing?

Definition of organic

- 89% of organic operators define organic as the environmental maintenance and enhancement without the use of synthetic fertilisers and chemicals
- About a third also considered the conservation of energy, soil and water, and a quarter noted recognition of livestock welfare needs as definitions of organic production.

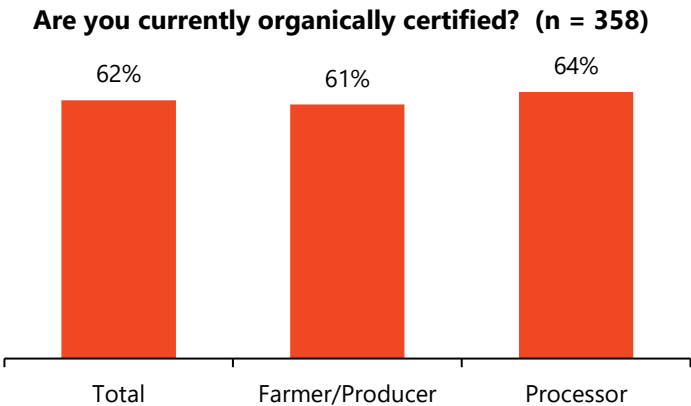
How do organic operators define organic? (n = 358)



Q5A. Out of the following what is your definition of organic?

Organic certification

- Almost two-thirds (62%) of all respondents were organically certified.
- The proportion of certified respondents was similar for farmers/producers (61%) and processors (64%).
- Horticulture was the organic product with which the largest proportion of both producers (29%) and processors (21%) was involved.
- 47% of certified producers and 33% of certified processors were involved with horticulture.
- Livestock was the second most popular organic product produced (18%), rising to 30% for certified producers. For processors, grapes were the second-largest organic product, with involvement by 13% of all processors and 20% of all operators with organic certification.
- The concentration of certification was considerably higher in QLD (74%) and NSW (67%) than in other states (50%-55%).
- The lowest level of certification was in SA/NT (50%), with 3% not knowing.
- Although not significant, male respondents were more likely than women to be certified.



	% of all Operators by Type			% of all Certified Operators by Type		
	Total	Producer	Processor	Total	Producer	Processor
Certified horticulture	29%	29%	21%	43%	47%	33%
Certified livestock	18%	18%	9%	27%	30%	15%
Certified grapes	9%	9%	13%	14%	15%	20%
Certified grain	6%	6%	1%	10%	11%	1%
Certified dairy	4%	4%	2%	6%	7%	4%
Certified poultry	3%	3%	1%	4%	5%	1%
Base	325	325	127	221	197	81

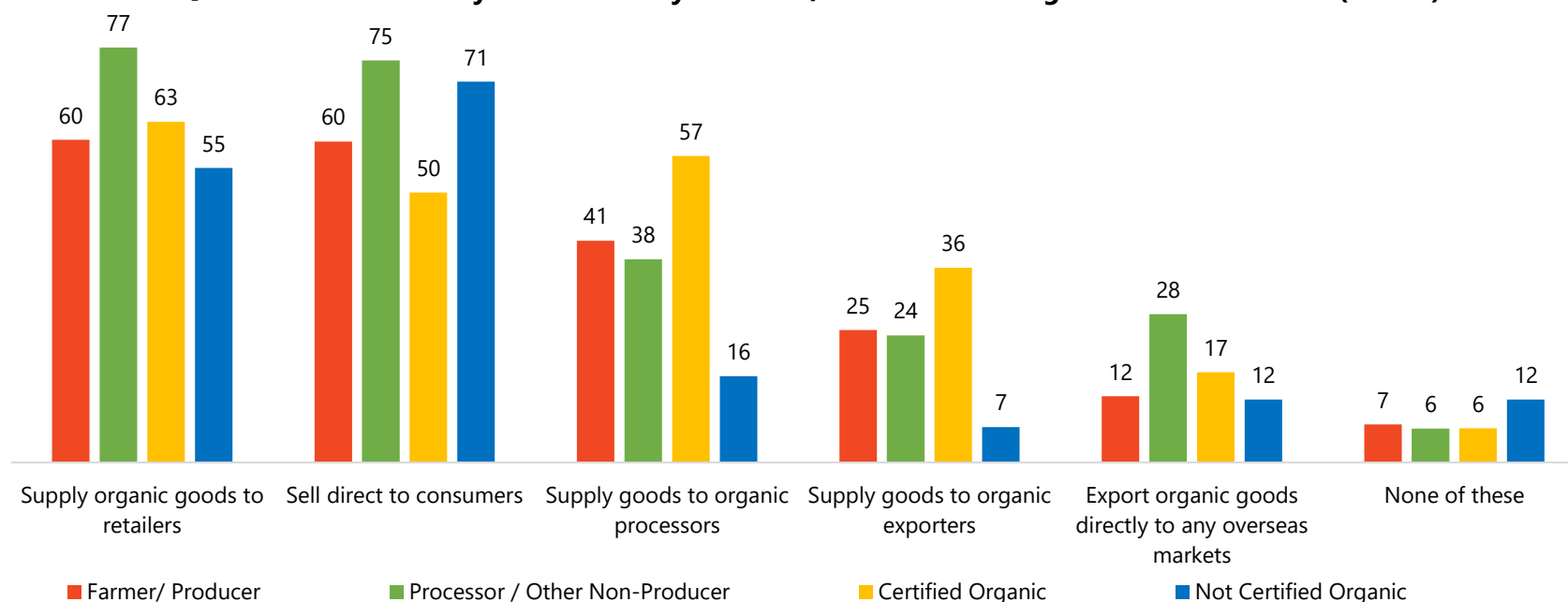
	Total	STATE						PRODUCER/PROCESSOR		GENDER	
		NSW	QLD	VIC	SA/NT	WA	TAS	Farmer/ Producer	Processor Or Other Non- Producer	Male	Female
% Organically certified	62	67	74	54	50	52	55	61	64	64	54
% Not organically certified	38	32	26	47	47	47	45	39	35	35	45
% Don't know	0.6	1	-	-	3	-	-	0.3	0.8	0.4	1
Base	358	97	85	99	38	19	20	325	127	267	91

Q18. Are you currently organically certified?

Activities currently undertaken

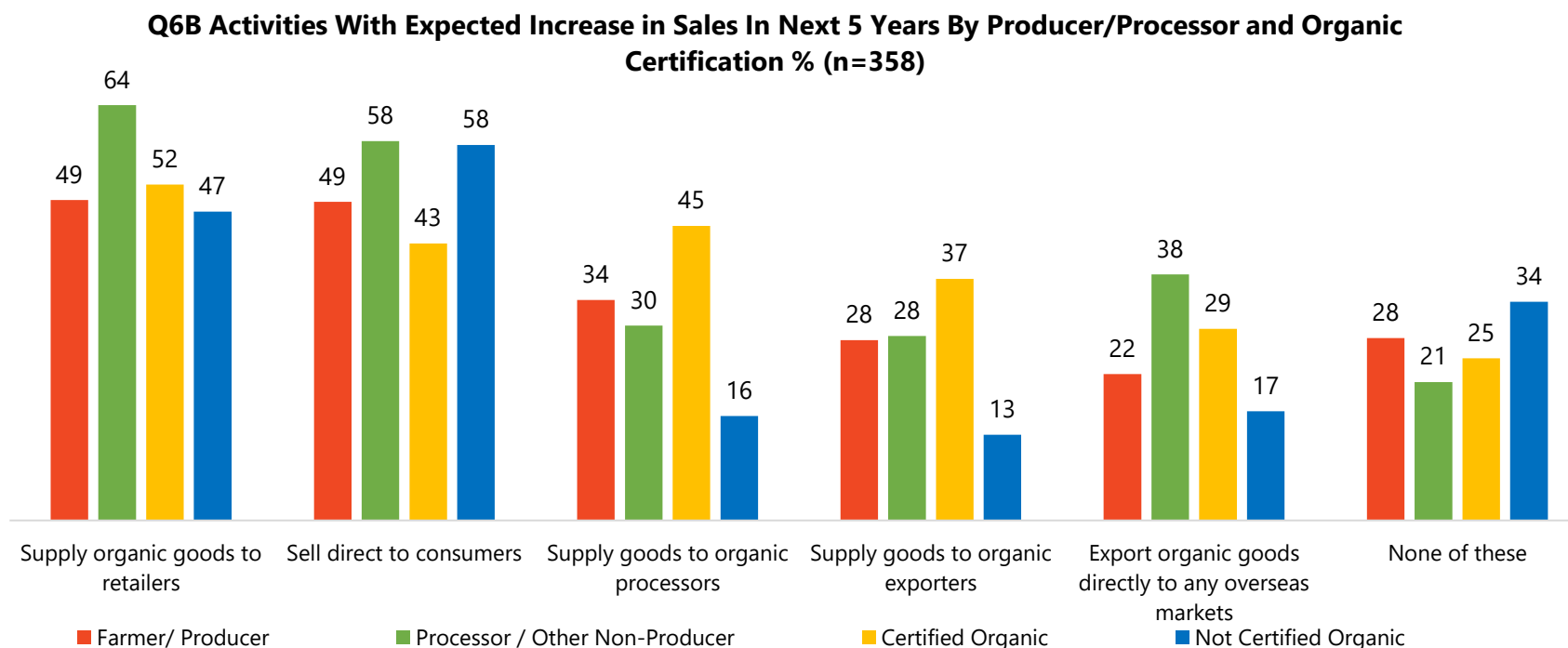
- Farmers/producers predominantly supplied organic goods to retailers (60%) or sold directly to consumers (60%).
- Compared to farmers/producers, a greater proportion of processors were supplying organic goods to retailers (77%) or selling directly to consumers (75%). This is in line with their roles in the supply chain.
- Across Australia, only 15% of respondents exported goods directly to overseas markets. However, a significantly higher proportion (42%) of South Australian respondents were already exporting to overseas market (Figures available in raw data).
- 28% of processors currently export organic goods directly to overseas markets.
- A higher percentage of respondents who were certified supplied organic goods to retailers (63%) than those who were not certified organic (55%). This may reflect the demand for certified organic products by many retailers.
- In contrast, a higher percentage of those who were not certified organic sold directly to consumers (71%) than those who are certified organic (50%).
- Of all respondents, those organically certified had the highest percentage (57%) of respondents supplying goods to organic processors and goods to organic exporters (36%). This is consistent with organic growers wanting to sell to organic processors and exporters to maintain the integrity of their produce.
- A higher percentage of respondents who were not certified organic sold directly to consumers (71%) than organically certified respondents.
- While not significant, a considerably lower proportion of respondents who were not certified organic (7%) indicated they supplied goods to organic exporters compared to the other three groups.

Q6A Activities Currently Undertaken By Producer/Processor and Organic Certification - % (n=358)



Expected increase in production in next five years

- 49% of farmers/ producers expect their supply of organic goods to retailers and sales directly to consumers to increase in the next five years.
- A greater percentage of processors expect supplying organic goods to retailers (64%) and selling directly to consumers (58%) to increase in the next five years, compared to farmers/producers.
- In total, the proportion of respondents expecting to increase sales of organic goods directly to overseas markets in the next 5 years is 25%, higher than the current proportion exporting directly. Processors had the greatest proportion (38%) of respondents who expect an increase in exporting organic goods directly to any overseas markets in the next five years.
- Among certified organic respondents, most (52%) expect the supply of organic goods to retailers to increase in the next five years.
- In comparison, 58% of respondents who were not certified organic expect an increase in sales directly to consumers in the next five years.



Non-organic business operations practices

- 40% of respondents had an operation that involved non-organic products.
- 59% of respondents who produce products that are not organic operate a parallel model.
- A higher proportion of processors (67%) operated a parallel model compared to 56% of farmers/producers.
- A high proportion of certified grain (86%) and certified poultry producers (75%) ran a parallel model. In comparison, a high proportion of uncertified poultry and grape producers (75% and 79%, respectively) ran a parallel model.
- On average, 45% of each business was organic, ranging from 20% for poultry to 76% for livestock.
- 93% of organically certified respondents separated their organic and non-organic operations, while only 50% of non-certified organic separated theirs. This was the widest difference between certified and uncertified respondents among these measures.
- None of the certified dairy farmers separated their organic and non-organic production. Conversely, the entirety of the small sample of uncertified dairy operations did separate their organic operations. This may reflect that only 14% of certified dairy farmers were also involved in non-organic production.
- Additionally, only 18% of uncertified grape growers separated their organic and non-organic operations.
- A higher proportion (96%) of certified processors separated their operations compared with 41% of uncertified processors.

	Total	PRODUCER/PROCESSOR		ORGANIC CERTIFICATION		CERTIFIED BY PRODUCER TYPE							UNCERTIFIED BY TYPE						
		Farmer/Producer	Processor Or Other Non-Producer	Certified organic	Not organically certified	Horti-culture	Grapes	Livestock	Dairy	Grain	Poultry	Processor	Horti-culture	Grapes	Live-stock	Dairy	Grain	Poultry	Processor
<i>Sample (n=)</i>	358	325	127	221	137	94	30	60	14	21	9	81	60	40	20	11	1	10	45
% Operation also involved products that are not organic? (Q8)	40	36	52	40	40	29	50	32	14	33	44	52	33	35	20	55	100	40	51
% Operate a parallel production model? (n=144) (Q9)	59	56	67	62	55	44	60	63	50	86	75	64	35	79	50	50	0	75	74
Proportion of the business that is organic (n=144) (Q10)	45	51	43	44	48	40	51	76	40	58	45	39	55	48	65	41	100	20	51
% Separate the operation of organic vs non-organic? (n=85) (Q11)	78	77	75	93	50	100	89	92	0	100	100	96	71	18	50	100	0	67	41

Q8. Does your operation also involve products that are not organic? **Q9.** Do you operate a parallel production model? **Q10.** What proportion of the business is organic

Q11A. Do you separate the operation of organic vs non-organic?

Segregation practices

- Among the farmers/producers who separated their organic and non-organic operations to avoid contamination, 42% segregated it by having different growing locations, and 20% indicated they had different production areas. Processors also used different production areas (33%).
- A strict cleaning procedure was followed by 36% of processors, while only 18% of farmers/producers followed this segregation method.
- Both certified organic and not certified organic respondents indicated that they had different growing locations to segregate organic and non-organic products.
- 31% of organically certificated respondents used clear identification/record-keeping to segregate products. Interestingly, only 7% of not organically certified respondents used this segregation method.

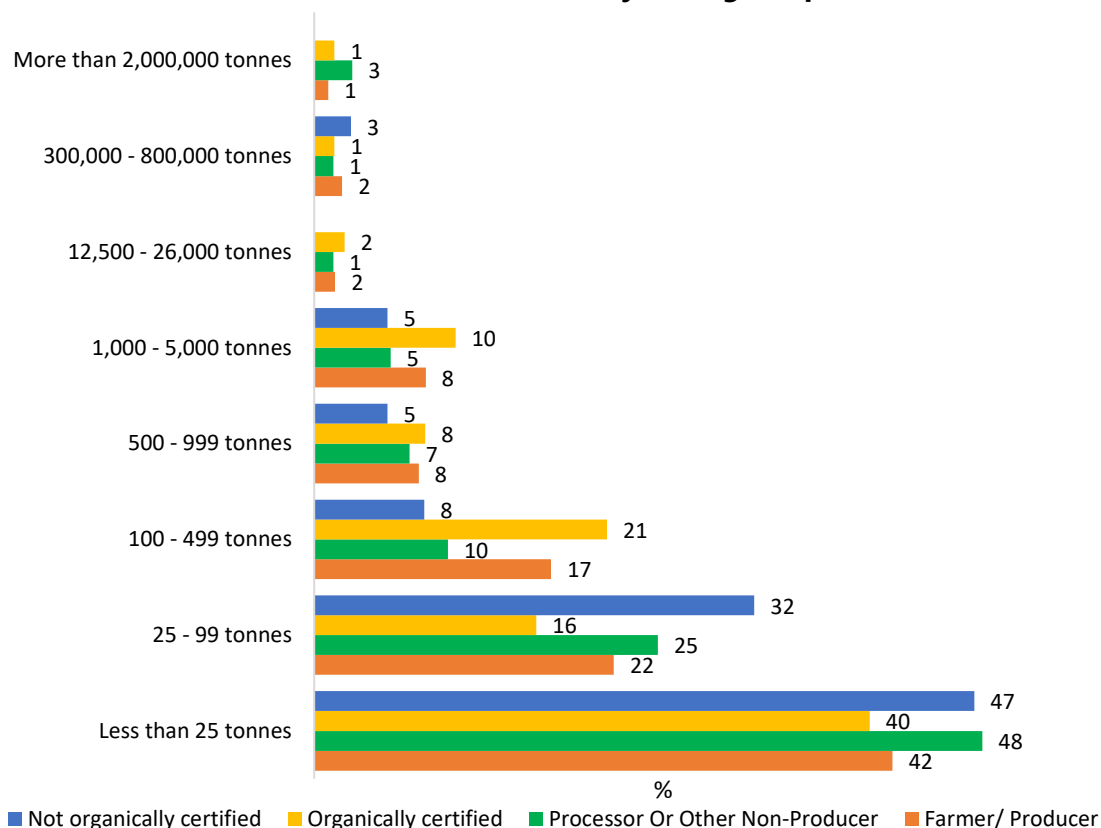
How do you segregate the operation to avoid contamination between organic and non-organic products?	Total	PRODUCER/PROCESSOR		ORGANIC CERTIFICATION	
		Farmer/ Producer	Processor Or Other Non- Producer	Yes	No
Different growing locations / separate sites	32%	42%	9%	31%	33%
Clear identification / record keeping / appropriate protocols / procedures	26%	22%	30%	31%	7%
Strict cleaning procedure	24%	18%	36%	27%	13%
Different production areas	23%	20%	33%	25%	13%
Separate equipment / storage	21%	22%	27%	24%	13%
Separate production schedule / processing schedule	12%	6%	21%	12%	13%
Proper isolation processes / quarantine yards	5%	4%	9%	6%	-
Process organic first	5%	2%	9%	6%	-
Different transport / different trucks	5%	6%	3%	2%	13%
Testing for chemical residues	3%	-	6%	4%	-
Not needed / not yet certified	3%	4%	-	-	13%
Other	5%	6%	-	-	20%
Do not know	2%	2%	-	2%	-

Q11B - How do you segregate the operation to avoid contamination between organic and non-organic products?

Annual volume of organic production

- More than a third of respondents could not recall their estimated annual gross value of their production.
- In general, the total volume of organic production was relatively small, with at least 40% of any group producing less than 25 tonnes annually. Those most likely to produce less than 25 tonnes were horticulture growers (59% if certified and 65% if not certified).
- Those not organically certified had the highest proportion (32%) who produced between 25-99 tonnes.
- Those who were organically certified typically produced a larger volume than non-certified growers, with (21%) producing between 100-499 tonnes compared with only 8% of those who were not certified.
- Less than 10% of total respondents produced over 5,000 tonnes. However, six respondents produced more than 300,000 tonnes, with one producing 50,000,000 tonnes.

What is the estimated annual volume of your organic production? (n=214)



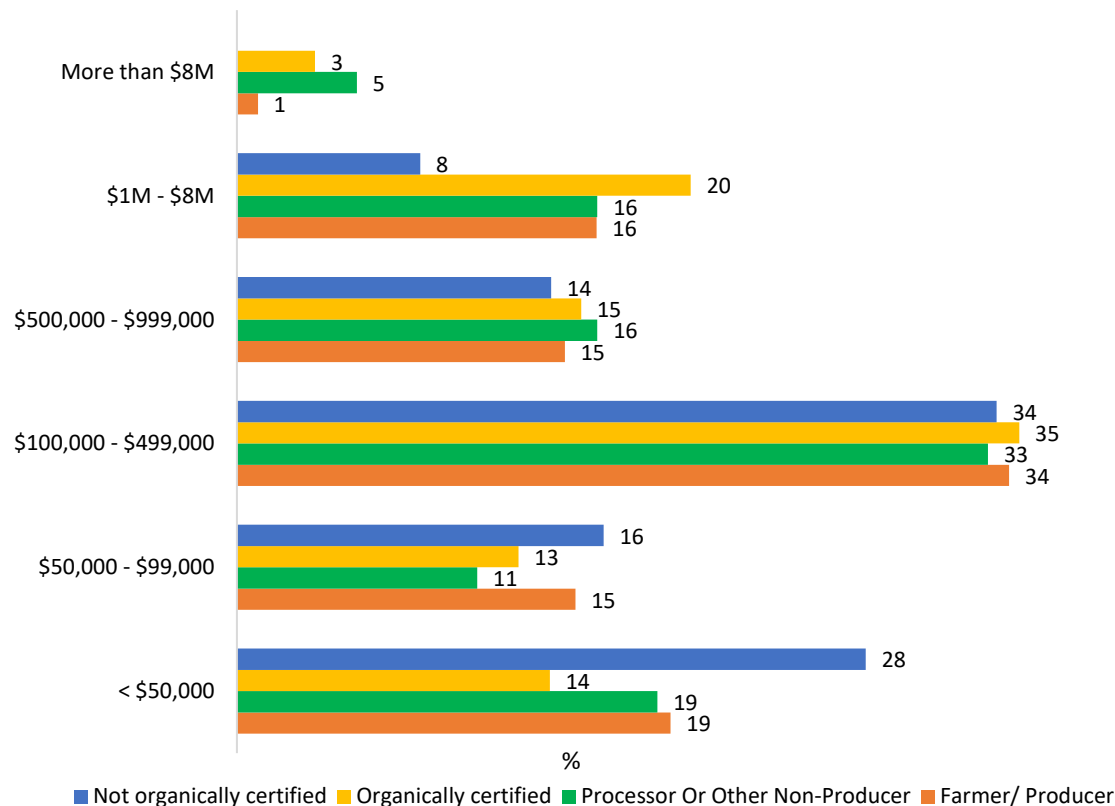
	Certified Horticulture Grower	Certified Grapes Grower	Certified Livestock Producer	Certified Dairy Farmer	Certified Grain Grower	Certified Poultry Producer	Certified Processor	Uncertified Horticulture Grower	Uncertified Grapes Grower	Uncertified Livestock Producer	Uncertified Dairy Farmer	Uncertified Grain Grower	Uncertified Poultry Producer	Uncertified Processor
Less than 25 tonnes	59%	27%	22%	-	6%	17%	44%	65%	37%	33%	29%	-	100%	54%
25 - 99 tonnes	17%	27%	17%	9%	6%	17%	18%	19%	46%	17%	14%	-	-	36%
100 - 499 tonnes	16%	27%	31%	18%	53%	-	13%	6%	11%	-	-	-	-	4%
500 - 999 tonnes	3%	9%	8%	45%	12%	33%	7%	3%	3%	33%	29%	100%	-	7%
1,000 - 5,000 tonnes	3%	5%	14%	18%	24%	33%	9%	6%	-	-	14%	-	-	-
12,500 - 26,000 tonnes	-	-	3%	9%	-	-	2%	-	-	-	-	-	-	-
300,000 - 800,000 tonnes	2%	-	3%	-	-	-	2%	-	3%	17%	14%	-	-	-
More than 2,000,000 tonnes	-	5%	3%	-	-	-	4%	-	-	-	-	-	-	-

Q12. And what is the estimated annual volume and annual gross value of your organic production?

Annual gross value of organic production

- Again, over a third of respondents could not recall their estimated annual gross value of their production,
- The most prevalent estimated annual gross value of \$100,000 - \$499,000.
- Uncertified operators had the greatest proportion with an estimated annual gross value of less than \$50,000.
- Those who were organically certified had the highest proportion (20%) with an estimated annual gross value between \$1 – 8 million.
- 60% of certified dairy farmers have an annual gross value of between \$1-8 million.
- As seen with volume, only a small number of respondents reported a very high value for their production. Five respondents reported more than \$10m in value, with one reporting \$80m.

What is the estimated annual gross value of your organic production? (n=230)

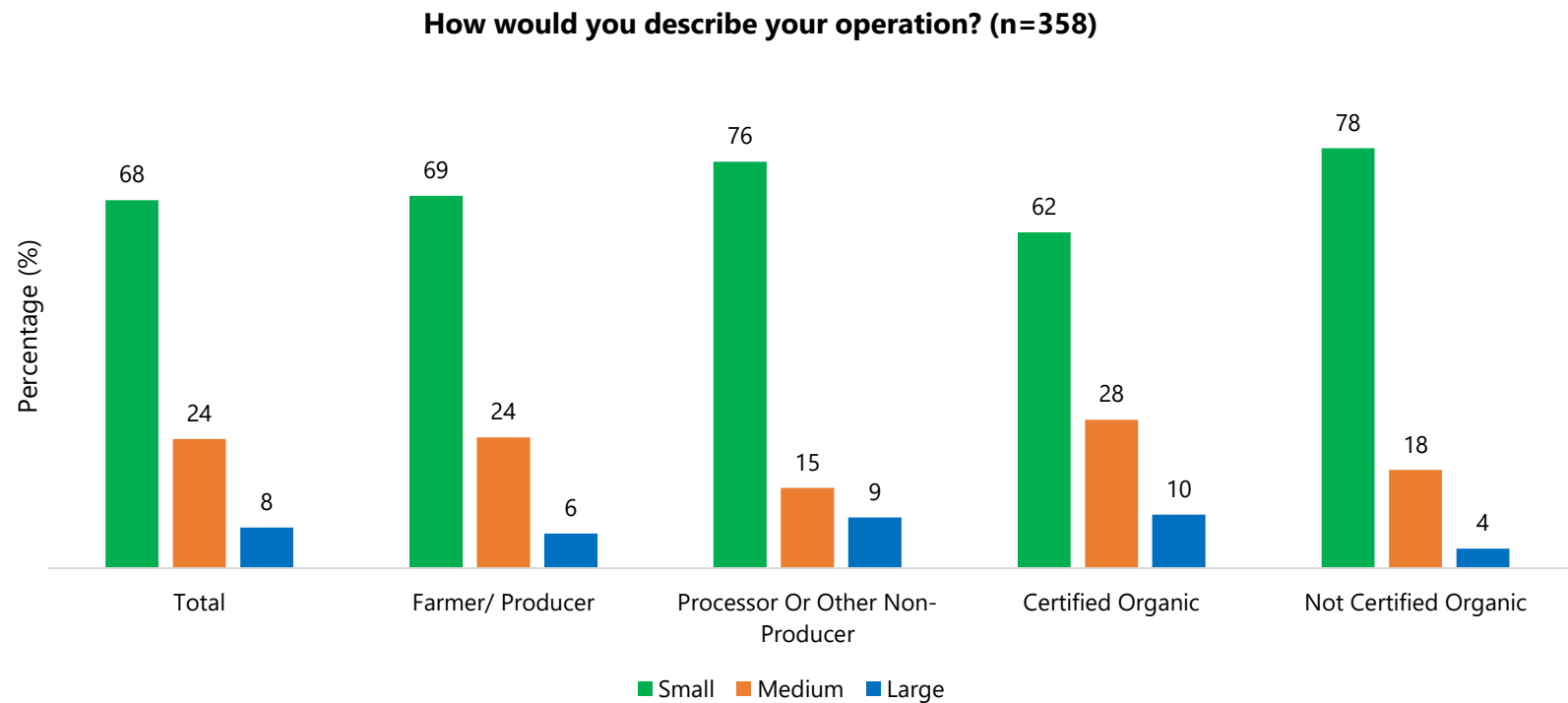


	Certified Horticulture Grower	Certified Grapes Grower	Certified Livestock Producer	Certified Dairy Farmer	Certified Grain Grower	Certified Poultry Producer	Certified Processor	Uncertified Horticulture Grower	Uncertified Grapes Grower	Uncertified Livestock Producer	Uncertified Dairy Farmer	Uncertified Grain Grower	Uncertified Poultry Producer	Uncertified Processor
< \$50,000	18%	5%	13%	10%	6%	13%	13%	38%	19%	23%	40%	-	50%	28%
\$50,000 - \$99,000	23%	10%	11%	-	-	-	11%	17%	19%	15%	-	-	25%	10%
\$100,000 - \$499,000	40%	40%	34%	10%	56%	-	33%	33%	37%	31%	40%	-	-	34%
\$500,000 - \$999,000	10%	10%	18%	20%	25%	38%	13%	7%	15%	15%	-	-	25%	21%
\$1M - \$8M	8%	35%	21%	60%	13%	50%	22%	5%	11%	15%	20%	-	-	7%
More than \$8M	2%	-	3%	-	-	-	9%	-	-	-	-	-	-	-

Q12. And what is the estimated annual volume and annual gross value of your organic production?

Size of organic operation

- Overall, the vast majority (68%) of respondents described their organic operation as small – 69% producers and 76% processors.
- Certified organic operators had a greater proportion who considered their operation medium (28%) or large (10%).
- Not certified respondents tended to be from smaller operations, with only 18% considering their operation medium and 4% large.

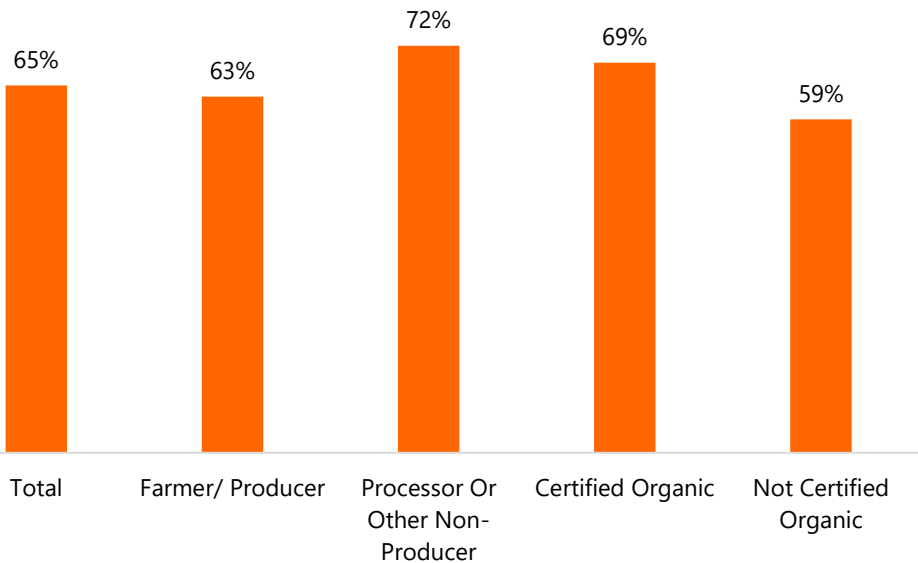


Q13. How would you describe your operation?

Cost of organic operations

- Most respondents considered it more expensive to be an organic farmer.
- More processors (72%) consider organic operations more expensive than farmers/producers (63%).
- Similarly, 69% of certified organic respondents considered organic production more expensive, while only 59% of those uncertified agreed.
- More than 80% of farmer/producers, processors and certified organic operators had produced organic products for at least five years.
- Those who were not certified organic were somewhat less likely to have been in the sector for more than five years (73%) than those who were certified (85%). This may reflect the time it takes to become certified and barriers such as cost.

% Think it is more expensive to be an organic farmer (n=358).



Have you produced organic products for over 5 years?	Total	Farmer/ Producer	Processor Or Other Non-Producer	Certified Organic	Not Certified Organic
% Yes	80%	81%	83%	85%	73%

Q14. Do you think its more expensive to be an organic farmer? Q15. Did or have you produced organic products for over 5 years?

Expect increase or decrease in organic production in next 5 years

- There were similar results for each group in this question.
- Respondents were generally optimistic, with more than half expecting an increase in their level of organic production in the next 5 years.
- The main reason respondents indicated that they are expecting an increase was because they are expanding their business/production.
- The second most common reason behind an expected increase was increased demand and awareness for organic products.
- No more than 7% of respondents expected a decrease in their organic production in the next five years.
- Those that expected a decrease indicated the main reasons behind it were because of heading into retirement (23%), getting too old (14%), or just a general downsizing of their production (14%).

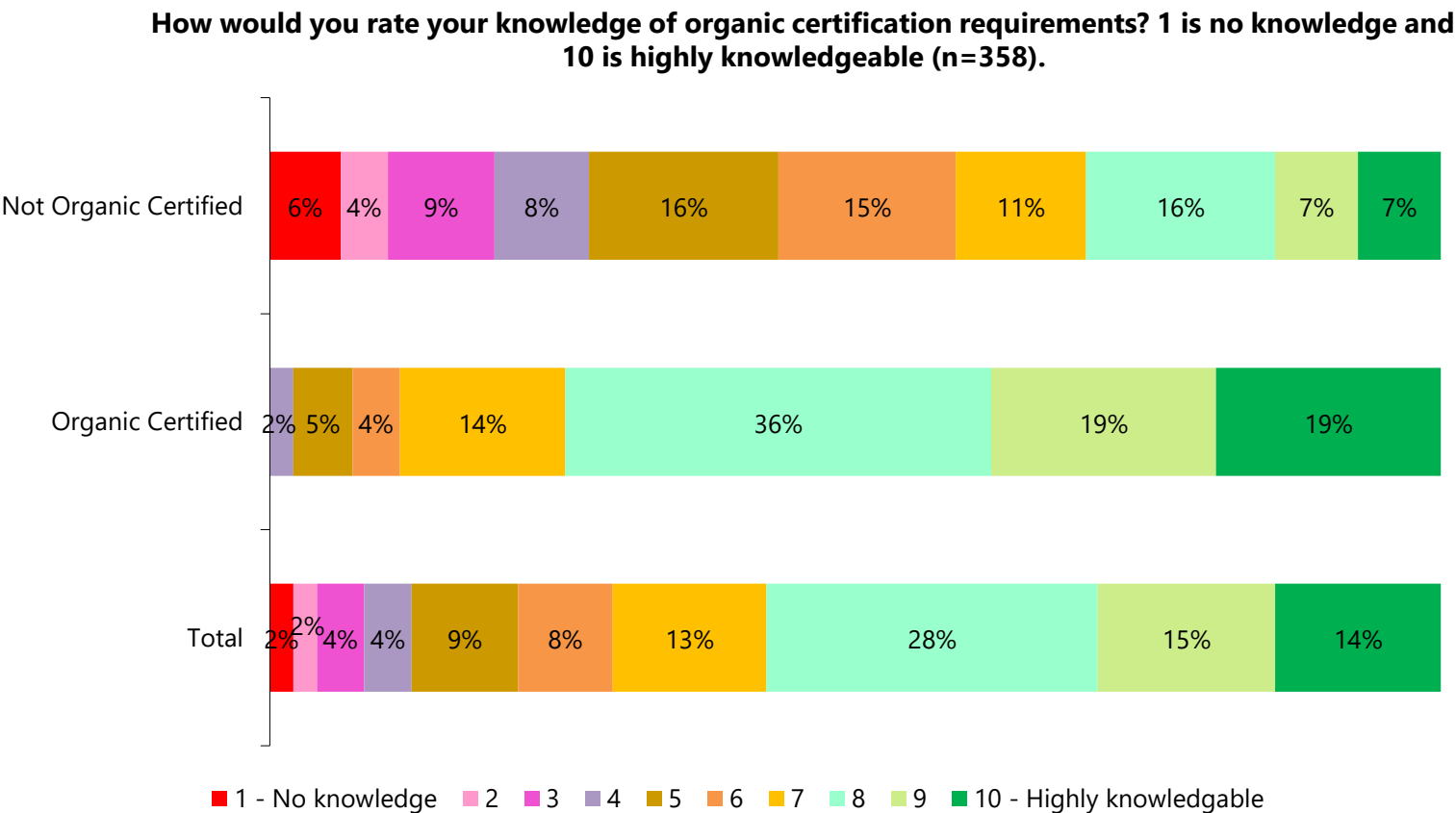
	Total	Farmer/ Producer	Processor Or Other Non- Producer	Certified Organic	Not Certified Organic
Do you expect a decrease, increase or no change in your own level of organic production in the next 5 years?					
Decrease	6%	7%	6%	6%	7%
Increase	60%	60%	66%	62%	57%
No change	31%	30%	26%	30%	33%
Don't know	3%	3%	2%	3%	4%
Why do you expect it to Increase					
Expanding business/ production	48%	49%	39%	47%	49%
Demand / awareness	24%	23%	35%	21%	31%
Becoming more efficient / better management / learning more	7%	8%	7%	7%	8%
Just trying to increase the income / profit	6%	6%	5%	7%	4%
Will diversify / have different products	6%	6%	8%	6%	5%
Other reasons for expecting an increase	6%	6%	10%	7%	4%
Moving past hard times / drought / bad season / season looking better	5%	6%	4%	6%	4%
Improved methodology / changed our model	5%	5%	-	4%	5%
Have not yet reached our full potential	4%	4%	4%	4%	4%
Putting in more time and energy into organic farming	4%	4%	4%	4%	4%
Why do you expect it to Decrease					
Heading into retirement	23%	23%	14%	15%	33%
Getting too old	14%	14%	14%	15%	11%
Will be downsizing production	14%	14%	14%	15%	11%
It is hard work / physically demanding work	14%	14%	-	23%	-
No longer procuring organically	9%	9%	14%	-	22%
Can't get enough labour	9%	9%	-	15%	-
Running costs are too high	9%	9%	-	15%	-
Organic is too restrictive	9%	9%	14%	8%	11%
2019 Bushfires knocked out a bit of our orchard	5%	5%	14%	8%	-
Other reasons for expecting a decrease	18%	18%	29%	23%	11%

Q16. Do you expect a decrease, increase or no change in your own level of organic production in the next 5 years? **Q16A.** And why do you expect it to decrease?

Q16B. And why do you expect it to increase?

Knowledge of organic certification requirements.

- 74% of organically certified respondents rated their knowledge about organic certification requirements at 8 or more out of 10.
- In contrast, only 30% of those not organically certified claimed this high level of knowledge.



Q17. Using a 1-10 Scale where 1 is No knowledge and 10 is highly knowledgeable, how would you rate your knowledge of organic certification requirements?

Organic certification

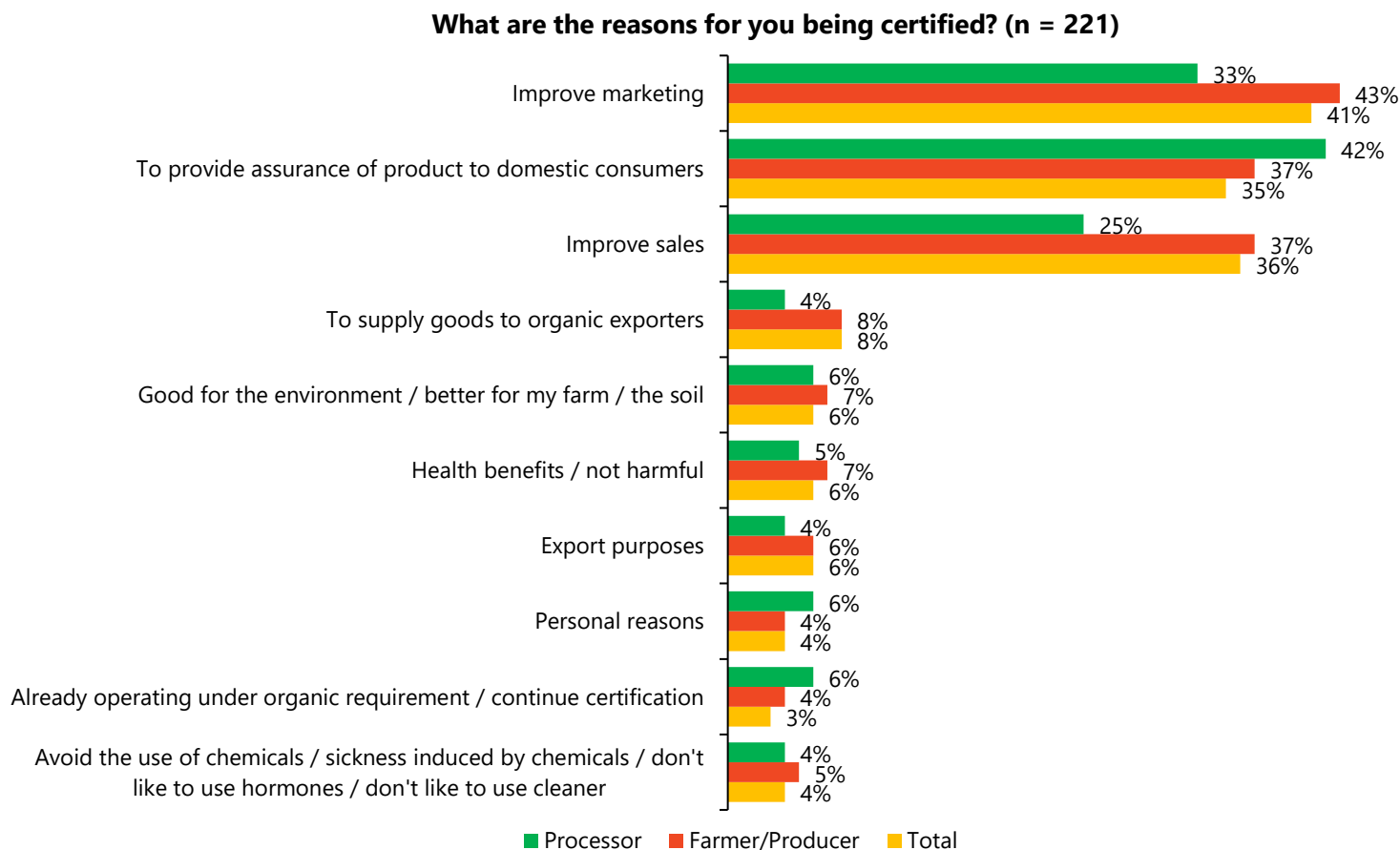
- As reported previously, 62% of organic operators were organically certified.
- The Australian Certified Organic (ACO) certifying body was the main certifying body that both farmers/producers (76%) and processors (74%) were with.
- The majority of farmers/producers (60%) and processors (57%) operated under the National Standard for Organic and Bio-Dynamic Produce. However, 18% of farmers/producers and 20% of processors indicated they did not know what standard they were under.
- Only 1% of farmers/ producers and processors were certified in-conversion.
- The average number of years of certification was 12 years for farmer/producers and 13 for processors. This shows the relatively youthful nature of the industry.

	Farmer/ Producer	Processor Or Other Non- Producer
Q19. Certifying body		
Australian Certified Organic (ACO)	76%	74%
NASAA Certified Organic (NCO)	16%	14%
AUS-QUAL	3%	3%
Southern Cross Certified Australia (SXC)	3%	5%
Organic Food Chain (OFC)	2%	4%
Q20. Standard operated under		
National Standard for Organic and Bio-Dynamic Produce	69%	57%
Australian Standard AS6000:2015 Organic and biodynamic product	34%	35%
Industry Private Standard	7%	10%
Don't know	18%	20%
Q21. Certified 'in-conversion' or certified organic?		
Certified Organic	98%	94%
Certified in-conversion	1%	1%
Q22. For how long have you been certified?		
Average Years	12	13

Q19. Which certifying body are you with? **Q20.** And which standard do you operate under? **Q21.** Are you certified 'in-conversion' or certified organic?

Reasons for organic certification

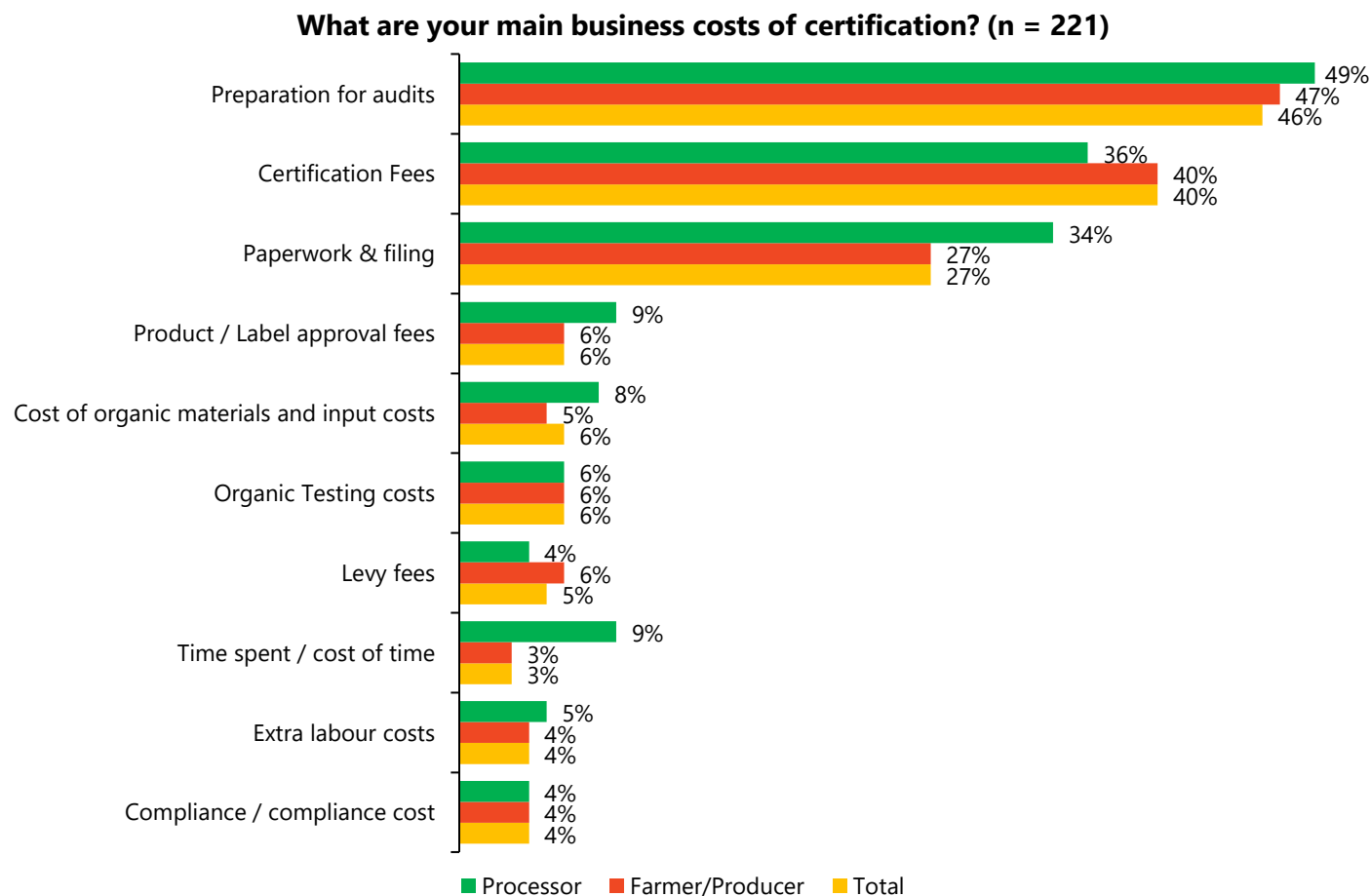
- The main reasons for being certified were to improve marketing, provide product insurance to domestic customers, and improve sales. Although with some variations, they were the top three reasons for farmers/producers and processors.
- 43% of farmers and 33% of processors said they had become certified because of improved marketing.
- Being certified to improve sales was mentioned by 37% of producers, but only 25% of processors. This may indicate market pressure to demand certification from growers but less direct demand on processors.
- 42% of processors were certified to provide assurance of product to domestic consumers, compared to 37% of farmers/producers.



Q23. What are the reasons for you being certified?

Business costs of certification

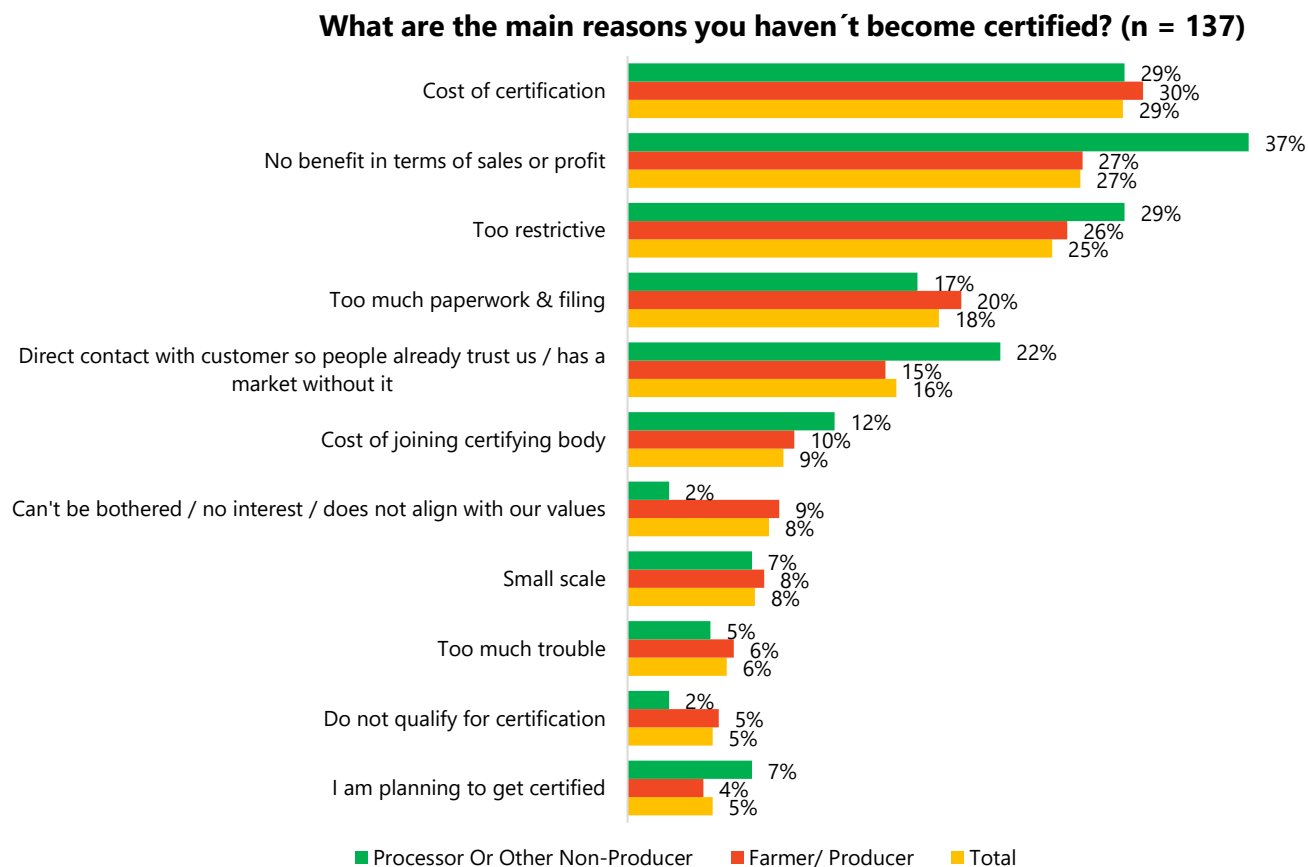
- There was little variation between farmer/producers and processors for the main business costs of certification, with preparation for audits and certification fees being the most common costs.
- A larger percentage of processors (34%) considered paperwork & filing a main business cost than farmers/producers (27%).
- In addition, a greater proportion of processors (9%) consider the time spent/the cost of time to be a main business cost of certification compared to only 3% of farmers/producers.



Q24. What are your main business costs of certification?

Uncertified organic operators

- Only 13% of farmer/producers and 9% of processors who are currently not organically certified had been certified in the past.
- The top three reasons for processors to not be certified were that there was no benefit in terms of sales or profit (37%), organic certification is too restrictive (29%), and the cost of certification (29%). They were considerably more likely than producers to mention that they had direct contact with their customers who already trusted them (22% versus 15%).
- The main reason for farmers/producers not becoming certified was the cost of certification (30%), no benefit for sales or profit (27%), it being too restrictive (26%) and too much paperwork (20%).



Q26. What are the main reasons you haven't become certified?

Benefits of producing organically

- Respondents indicated there were various benefits to producing organically.
- The top three benefits, each mentioned in similar proportions, environmental health and healthier product for the consumer (both 23%) and consumer/ market demand (22%).
- Other key benefits identified better prices/higher returns (15%), personal satisfaction/doing the right thing (14%), premium product (14%), personal health of producer (13%) and soil health (13%).
- There was little variation in the incidence of the top benefits between farmer/producers, processors, certified organic, and those who were not certified.
- However, a significantly high 37% of females versus just 18% of males reported the main benefit being a “healthier product for consumer/community safety/more nutritious”.

		PRODUCER/PROCESSOR		ORGANIC CERTIFICATION		GENDER	
Q27 What do you think is the top benefit of producing organically?	Total	Farmer/ Producer	Processor Or Other Non- Producer	Certified Organic	Not Certified Organic	Male	Female
Healthier product for consumer/community safety / more nutritious	23%	23%	24%	21%	25%	18%	37%
Environmental health/benefit / the environment	23%	23%	29%	20%	27%	20%	31%
Consumers like/want/trust products / market demand	22%	21%	25%	24%	18%	24%	16%
Better prices / higher returns / higher margin	15%	16%	9%	17%	10%	15%	12%
Better product / higher quality product / premium product	14%	14%	12%	15%	12%	15%	12%
Peace of mind / personal satisfaction / doing the right thing	14%	15%	14%	17%	9%	12%	21%
Personal health of producer / healthier lifestyle	13%	14%	13%	13%	15%	12%	19%
Soil health / good for the land / good for the farm	13%	14%	11%	11%	17%	12%	18%
Sustainability / green / environmental sustainability	12%	11%	14%	12%	11%	13%	7%
Reduced herbicide use / less chemical inputs	10%	11%	11%	7%	15%	10%	10%
Cleaner product / less chemicals in the product / natural product	9%	9%	9%	10%	7%	9%	10%

Q27. What do you think is the top benefit of producing organically?

Issues faced when producing organically

- Weeds and the control of weeds/lack of herbicides was the most common issue faced by respondents (21%) when producing organically. This issue was mentioned slightly more (24%) by certified organic respondents, while only 10% of those who were not certified mentioned this issue.
- Labour (e.g., costs, intensiveness, lack of available labour) was the second most common issue faced by organic operators.
- Slightly more processors had an issue with access to organic raw material/access to other certified inputs (16%) than farmers/ producers (12%).
- In general, the main issues were mentioned in relatively equal proportions between groups, suggesting that the issues impacted all groups in a similar way.
- There were no significant differences between males and females regarding the main issues faced when producing organically. However, a slightly higher proportion of males (22%) said weeds/ control of weeds was the main issue than 18% of females.

		PRODUCER/PROCESSOR		ORGANIC CERTIFICATION		GENDER	
Q28 What has been the main issue you have faced when producing organically?	Total	Farmer/ Producer	Processor Or Other Non- Producer	Certified Organic	Not Certified Organic	Male	Female
Weeds /control of weeds / lack of herbicide options	21%	23%	22%	24%	18%	22%	18%
Labour	14%	15%	16%	14%	13%	13%	16%
Access to organic raw material / access to other certified inputs	14%	12%	16%	14%	14%	14%	13%
Pests / vermin / pest control/management / insects	13%	14%	12%	11%	15%	11%	16%
Cost / expensive inputs / other specific cost mentions	11%	11%	13%	9%	15%	9%	16%
Disease pressure / fungal control / diseases	10%	10%	11%	9%	12%	9%	11%
Low prices / finding markets/competing with conventional produce	9%	9%	6%	10%	8%	10%	7%
Weather / climate / heavy rain / adverse weather	9%	9%	8%	9%	8%	8%	11%
Supply / loss of production / maintaining a consistent supply	9%	8%	9%	10%	7%	9%	9%
None (no issues)	8%	8%	7%	8%	9%	7%	11%
Paperwork / certification/audit requirements / changes in rules	8%	8%	9%	10%	4%	8%	7%
Getting information/self education / the conversion period	8%	8%	4%	8%	7%	8%	5%

Q28. What has been the main issue you have faced when producing organically?

Compulsory certification scheme/ regulation

- Overall, 60% of all respondents agreed that a compulsory certification scheme/regulation would be useful.
- A surprisingly high 45% of not certified organic respondents agreed compulsory certification would be useful, compared with 69% of already certified respondents.
- The top reason respondents agreed with compulsory organic certification was that it will reduce fake organic activity (24%) and a belief that you should be certified if you claim to be organic (18%).
- 18% of uncertified respondents thought certification should be up to the individual/I don't like the idea of compulsion, while 12% thought fees would rise for producers/too expensive. However, 20% of those not certified thought it would reduce fake organic claims and 15% thought it would give consistent standards to what is organic.

Compulsory organic certification	Total	Farmer/ Producer	Processor Or Other Non- Producer	Certified Organic	Not Certified Organic
% Agree that a compulsory certification scheme / regulation would be useful	60%	59%	64%	69%	45%
Thoughts about compulsory organic certification					
Reduce fake organic / a lot of fraudulent activity with non-organic	27%	27%	27%	32%	20%
If you claim to be organic it should be compulsory to be certified	18%	18%	17%	22%	10%
Give a consistent standard for what is organic / lifts to international standard / consistency	14%	14%	18%	13%	15%
Should be up to the individual / I don't like the idea of compulsion / can't force people / government should not be involved in farming	10%	10%	12%	5%	18%
Fees would rise for producers / too expensive	8%	8%	9%	5%	12%
Integrity / credibility / transparency / maintain trust in system	8%	6%	10%	9%	5%
Too many regulations / all going too far / do not need more regulation	6%	6%	6%	4%	8%
Need to educate the people about what 'organic' actually is	5%	6%	4%	5%	5%
Should be strictly monitored / enforceable / must be audited	5%	5%	5%	6%	2%
Improve consumer confidence / would make it more reliable for consumers / provide clarity / less confusion for the public	5%	5%	6%	5%	4%
It's already happening / already regulated enough	4%	5%	2%	6%	1%
Makes it an even, fair playing field for all operations	4%	4%	5%	6%	1%
Too much paperwork / too much red tape / too bureaucratic / too time consuming	4%	4%	5%	3%	7%
Regulation should be centralized with one body / needs to be legislated	4%	4%	2%	3%	4%

Q29. Do you think a compulsory certification scheme / regulation for the organic market in Australia would be useful? **Q29A.** And why do you say that?

Products benefit from organic certification

- Honey was the product the highest percentage (70%) of all respondents agreed would benefit from organic certification.
- Consistent with not-certified organic status, a smaller proportion of not-certified organic respondents thought each product would benefit from organic certification compared with respondents who are organically certified.

Products that would benefit from organic certification	Total	Farmer/ Producer	Processor Or Other Non- Producer	Certified Organic	Uncertified Organic
Honey	70%	70%	65%	76%	61%
Cosmetics	62%	63%	56%	69%	50%
Household cleaners	58%	60%	50%	61%	53%
Pet food	53%	54%	54%	59%	44%
Do not know	4%	4%	2%	3%	4%
Everything should be organic	3%	3%	4%	5%	1%

Q30. Do you think any of these products would benefit by organic certification?

Non-organic operators

- KG2 spoke with 237 additional respondents who were not organic but interested in partaking in the survey despite not being eligible. They were asked if they had considered organic and why they were not currently organic.
- 19% of respondents indicated they had considered organic operations. Equally, 19% indicated they had not considered an organic operation or were not interested.
- The main reason respondents were not organic was there is no money in it (17%).
- Other reasons included it is not possible or feasible for my crop (16%) and the need for chemicals (16%).
- The raw dataset has been provided in addition to this report.

Themes provided about being organic and reasons not to be (n=237)	% of Responses
Do not want to / has not considered it / not interested	19%
I did consider it	19%
No money in it	17%
Impossible for where I am / not feasible for my crop	16%
Need to use chemicals	16%
No need to / happy with what we are doing now	13%
Too hard / too time consuming	13%
Costs too much	10%
Disease pressures	10%
Not worth the production loss / yield loss	8%
Weed control	7%
Tries as hard as possible to be close to organic	5%
Not as efficient as conventional methods/can't get the same quality	5%
Too wet / in a wet region	5%
Too restrictive / too many regulations	5%
Pest control	4%
No market access in his area / market not big enough	3%
Weather problems are prohibitive	3%
Other negative comments	3%
I am on the way to organic	3%
Gets good results now	3%
Very difficult to achieve	3%
Might consider it in future	2%
Not big enough/ need more land	2%
Difficult on a large scale	2%
The conventional is more nutritious / as healthy and safe	2%
Just a buzz word / marketing tool	2%
Too risky	1%
Insufficient labour	1%
Too many liars and imitation organic products	1%
Hasn't had time to fully understand it	1%
Hard to source organic inputs	1%
Left the industry	1%
No reason given	1%
High risk of spray contamination from neighbours	0.4%
Does not make the decisions	0.4%
New to the business	0.4%
None / no / nothing / N/A/ Unsure	2%

Q2. Is and or was your operation involved with either the production or processing of organic products? **Q2A.** Have you considered organic production or processing of organic products And why aren't you organic?

A close-up photograph of a person's hands, which are weathered and stained with dirt, holding a large quantity of yellow corn kernels. The person is pouring the kernels from their right hand into their left hand, with some kernels falling through their fingers. The background is a blurred field of dry, brownish vegetation under a clear sky. The person is wearing a dark blue long-sleeved shirt with white stripes on the cuffs.

End of Report

Skills & Qualification Profile

KG2 has a highly skilled team who are independent, experienced and passionate about their profession. KG2's contact centre is in-house and employs a team of interviewers who are highly educated specialists. They are working at KG2 as a requirement of their agriculture degree at Sydney University. Considerate interviewing and being able to communicate well results in higher response rates.

Adam McNeill Bbus **Managing Director**

Adam facilitates growth in both research and direct marketing for the KG2 business. Adam is a strategic thinker with a proven track record in market research and has been instrumental in achieving efficiencies in terms of the farmers' participation in major national quantitative market research studies.

Andrew Negline BEc **Commercial Director**

Andrew has more than 30 years' experience as a senior executive in the agriculture industry. Andrew has played a central role in many notable innovations and served on numerous advisory committees to major industry organisations and as a consultant specialising in product innovation, market development and supply chain management.

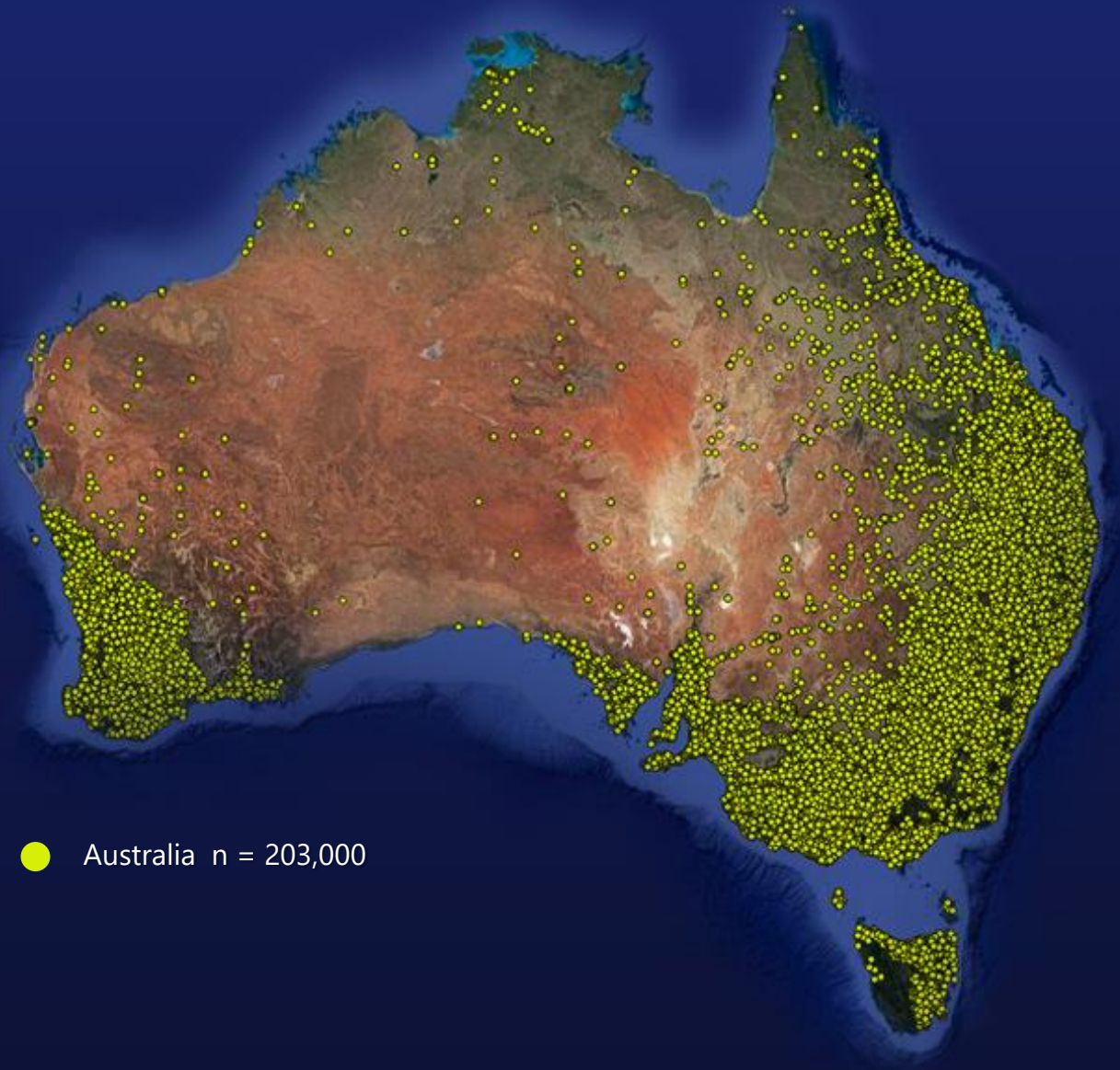
Lucinda Dunn BScAg(Hons), PhD Candidate **Research & Data Analyst**

Lucinda is a part of the research and development team here at KG2. Lucinda has extensive experience in quantitative and qualitative research, including questionnaire design, data analysis and reporting. Lucinda is currently undertaking her PhD in social and ecological constraints facing rice farmers in Cambodia, so her combination of academic research ability and industry experience ensures in-depth and detail orientated outputs.

John Campbell B.Sc.(Agr.) **Data Analyst**

John manages the data collection and supervision of research activities undertaken by the business. His attention to detail and extensive contact centre experience maximises the efficiencies of the interviewing team. John conducts the data audits for proprietary, syndicated and client research projects. John's experience with quantitative research projects, from facilitating interviews to presenting data, ensures that data integrity is front of mind.

KG2 Farmer Database



● Australia n = 203,000

Thank You



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