Final Results of the

FOURTH NATIONAL ORGANIC FARMERS' SURVEY:

Sustaining Organic Farms in a Changing Organic Marketplace

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Acknowledgements

Dedication

To organic farmers, and especially to those who have responded to one or more of OFRF's *four national surveys. While pursuing the dream and hard work of producing healthy food and farmland, organic farmers endure monumental levels of recordkeeping and paperwork to fulfill the organic certification process. Yet many respond to* OFRF's *surveys, which are lengthy, sometimes poorly timed (such as arriving during planting or harvest), and are a challenge to complete.*

Each returned survey presents a portrait of a unique farm and the people who farm it. It is both humbling and fascinating to explore farmer responses individually and as a collection. We thank all respondents for offering your time, for sharing information about your farms, and for caring about the land and the people who consume your farm products.

Participating Organic Certification Organizations

OFRF GRATEFULLY ACKNOWLEDGES THE FOLLOWING ORGANIC CERTIFICATION ORGANIZATIONS AND THEIR FARMER MEMBERS FOR THEIR VOLUNTARY PARTICIPATION IN THIS PROJECT.

***The following certification bodies (full project cooperators) provided lists of certified organic producers to* OFRF *for direct mail distribution of the survey*:**

California Certified Organic Farmers
Colorado Department of Agriculture
Demeter Association
Farm Verified Organic
Florida Organic Growers and Consumers
Hawaii Organic Farmers Association
Idaho Department of Agriculture
Iowa Department of Agriculture
Kentucky Department of Agriculture
Louisiana Department of Agriculture
Maine Organic Farmers and Gardeners Association
Maryland Department of Agriculture
Midwest Organic Services Association
Mountain States Organic Growers and Buyers Association
Nevada Department of Agriculture
New Hampshire Department of Agriculture
New Mexico Organic Commodity Commission
Northeast Organic Farming Association (NOFA) of Connecticut
Northeast Organic Farming Association (NOFA) of Massachusetts
Northeast Organic Farming Association (NOFA) of New York
Northeast Organic Farming Association (NOFA) of New Jersey
Northeast Organic Farming Association (NOFA) of Vermont
Northern Utah Organic Group
Ohio Ecological Food and Farming Association
Oregon Tilth

Organic Crop Improvement Association (OCIA) Chapters:

- OCIA Iowa
- OCIA Iowa 2
- OCIA Kansas 1
- OCIA Kansas 3
- OCIA Michigan
- OCIA Missouri 1
- OCIA Montana 3
- OCIA Nebraska 1
- OCIA Nebraska 2
- OCIA Nebraska 3
- OCIA New York 1
- OCIA North Dakota 1
- OCIA Ohio 2
- OCIA Pennsylvania 2
- OCIA South Dakota 1
- OCIA Wisconsin 1

Oklahoma Department of Agriculture
Pennsylvania Certified Organic
Quality Assurance International
Rhode Island Division of Agriculture
Texas Department of Agriculture
Virginia Department of Agriculture
Washington State Department of Agriculture

Surveys were sent in bulk to the following certifiers (limited project cooperators) for indirect distribution to their member growers:

Alaska Organic Certification
Global Organic Alliance
Organic Certifiers Incorporated
Organic Crop Improvement Association (OCIA) Chapters:

- OCIA Arkansas 1
- OCIA Illinois 1
- OCIA Iowa 3
- OCIA Iowa 4
- OCIA Kansas 2
- OCIA Michigan 1
- OCIA Michigan 2
- OCIA Minnesota 1
- OCIA Montana 1
- OCIA Montana 4
- OCIA North Dakota 2
- OCIA-Ohio 1
- OCIA-South Dakota
- OCIA-Virginia

Organic Verification Organization of North America

Survey Advisors

The following individuals were instrumental in the conceptual development of the 4th National Organic Farmers' Survey and/or in providing content review:

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Steve Sprinkel—Organic farmer, Ojai, California
Kelly Strzelecki—USDA Foreign Agriculture Service, Washington DC
Ada Wossink—Dept. of Agricultural and Resource Economics, North Carolina State University, Raleigh, North Carolina

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Melissa Matthewson—Producer list development; survey data review and processing
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Dianne Carter—Final project report layout and artwork
Cynthia Vagnetti and Jerry DeWitt—Photographs

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We appreciate the donations of gift certificates for goods and services provided by:

Ferrari Tractor
Rincon Vitova Insectaries
Acres USA
Johnny's Selected Seeds
Seeds of Change
Peaceful Valley Farm Supply
Harmony Farm Supply
Growing for Market
Johnny's Selected Seeds
Peaceful Valley Farm Supply

These gift certificates were awarded to survey respondents during a special prize drawing.

Finally, OFRF gratefully acknowledges the support of hundreds of individual contributors to our general program fund, and the following major funders that have helped make the 4th National Organic Farmers' Survey possible:

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Wallace Genetic Foundation
USDA Agricultural Marketing Service
Philanthropic Ventures Foundation - Barkley Fund
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—*Erica Walz*

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Introduction

These are the results of OFRF's *Fourth National Organic Farmers' Survey: Sustaining Organic Farms in a Changing Organic Marketplace*. During April and May 2002, a 22-page survey was mailed to 6,487 certified organic farmers throughout the United States, asking for information on a variety of topics corresponding to their farms and their 2001 production year.

The content of OFRF's fourth survey departs in some respects from our previous surveys. OFRF's first three national surveys, which collected data for the years 1993, 1995 and 1997, focused largely on production issues, production information, and organic farmers' production research perspectives. Over the past decade, the general purpose of OFRF's national organic farmers' surveys has expanded beyond serving the interests of OFRF's grantmaking program alone—with a corresponding emphasis on production and research issues—to one that includes responding to key public policy and marketing questions about organic farmers and the industry.

OFRF's fourth survey begins to explore issues related to farmers' experiences with organic marketing organic products. We started with very broad concepts, such as: What conditions have the greatest effect on organic farms' economic sustainability? What do prices and markets look like from the organic farmers' perspective? We framed several questions about organic market and price trends, about organic price premiums, and about information and services that are (or would be) most helpful to marketing organic farm products. We asked about negative influences on organic markets, and how farmers anticipated that the USDA National Organic Program Rule might impact their farming operation, over the near and longer term. In addition, OFRF's fourth survey explores other new territory, such as the effect on organic farmers of the presence of GMO's in agriculture, marketing order program participation, and participation in other federal farm programs.

Designing survey questions to clarify market-related issues among a diverse population of producers is challenging. Our approach to this challenge is to employ a strategy that includes questions with closed-ended response structures that are frequently followed by open-ended questions that allow for write-in responses. Open-ended questions help to identify both "anticipated" and "unanticipated" issues and concerns of respondents. The combination of closed- and open-ended response data helps to present a broader and more complete picture of organic producers as a group, which when gleaned may lead to the generation of more refined research questions, either by OFRF or by other investigators.

The agricultural landscape for organic producers changed considerably during the period between our third national survey—which was conducted in early 1998 and asked for information about the 1997 production year—and our fourth survey, conducted in 2002. The USDA National Organic Program Final Rule implementation was forthcoming but not yet operational, an organic meat marketing label had since gone into effect, GMO crops—incompatible by definition with organic systems—had taken a firm hold in the grain belt, and new policy issues had arisen, such as equity for organic farmers in federal crop insurance and marketing order programs. In addition, the consumer market for organic products continued to expand dramatically, and a significant level of market consolidation had taken place. In our fourth survey, we sought to address each one of these issue areas in some way.

As with past OFRF surveys, the quantity of information generated by OFRF's fourth national survey creates a variety of presentation challenges. Rather than summarizing our data, it is our responsibility to provide the full complement of information that we've received from organic farmers. Very little social research about organic farming is conducted on this scale. As organic farming advocates we feel we can best serve this role by furnishing all of the information we have

collected in frequency distribution tables. In addition, this is the first time that OFRF will make available a complement of write-in responses to open-ended questions, which will be posted on our website at www.ofrf.org.

In addition to these results, OFRF offers the service of providing our survey data to professional researchers interested in using it for investigative purposes that help to better understand organic farmers and farming systems. These services are subject to approval by OFRF and are fee-based, depending on the type and quantity of data requested. We encourage researchers to contact OFRF to determine whether OFRF survey data is an appropriate match to their research interests.

OFRF's National Organic Farmers' Surveys: Overview

1990 Organic Farmers' Survey

OFRF began surveying farmers in 1990. This two-page survey was intended to serve as a primary tool to identify organic farmers' research and information priorities. OFRF's first survey, sent to farmers certified by CCOF, Oregon Tilth and the Washington Dept.of Agriculture. From the 1990 survey we learned that organic farmers felt it very important to include farmer involvement in design and execution of research projects, and that projects should take place on working organic farms.

1993 National Organic Farmers' Survey

As an organization of national focus, OFRF's next logical step was to expand the survey beyond the western region and gather information from organic farmers across the country. The nature of organic certification greatly simplifies the means of developing an up-to-date survey population; certified organic growers annually renew certification status with a particular certifiying agency, and OFRF contacts certifiers directly to obtain their most recent producer certification list. This method of obtaining our survey population list has remained the same over the course of our four national surveys.

Because of this unique and unprecedented access to organic farmers on a national scale, the survey was expanded to include sections on Research and Education Priorities, Information Resources, Commodities Produced and Marketed, Farm Management and Labor, and demographics The 1993 survey was mailed to 2,700 certified organic farmers from the fifty-four organic verification organizations and chapters that would share their lists with OFRF. 550 surveys (a 20% response rate) were returned from growers in 39 states. Their number one priority for research was consumer demand for organic products, followed by the relationship of growing practices to crop quality and nutrition and the relationship between plant nutrition and resistance to pests. Organic farmers chose other farmers as their most useful source of information, followed closely by newsletters and magazines.We learned that the vast majority of organic farms are family farms (84%).

1995 National Organic Farmers' Survey

The rapid growth in sales of organic products during the ensuing two years corresponded to an increase in the number of farmers seeking organic certification. For the 1995 survey, OFRF was able to reach 3,480 certified organic farmers from 61 (out of 70 known) organic verification organizations or their chapters who would share their grower lists with OFRF.A ten page survey consisting of 50 questions was mailed to growers in 44 states. 945 (a 27% response rate) surveys were returned. Respondents' highest-ranked research priority was the relationship of growing practices to crop quality and nutrition followed by crop rotations for fertility and pest management. Consumer demand for organic products dropped to third in importance (after ranking first in 1993), reflecting perhaps an improvement in consumer awareness.

We also learned about organic farmers attitudes toward continued expansion. Fully 92% expected to either maintain (52%) or expand (40%) their number of commodities produced. Forty-nine percent of respondents planned to increase their organic acreage. Organic growers' average age of 46 years old was also approximately ten years younger than USDA's estimated average age for the entire population of U.S. farmers, suggesting that organic farming attracts a younger set of farmers. Sixty-three percent identified uncooperative or uninformed extension agents as a barrier to beginning organic production.

Third Biennial National Organic Farmers' Survey

OFRF's third national survey, expanded again to include eight sections and sixty questions. The survey was sent to 4,638 certified organic farmers from 55 organic certification organizations (out of 64 identified), and included two new topic areas: Organic Certification, and Organic Management Strategies. 1,192 surveys were returned from organic farmers in 44 states, a 26% response rate. Key results were: Respondents ranked weed management as their number one research priority; 72% of respondents indicated their opinion that genetically engineered inputs are not compatible with organic systems. Cover crops were identified as the strategy most frequently or regularly used for fertility management; Crop rotations were identified as the strategies most frequently used for both disease and insect pest management, and were also rated as important for weed management. Farmers experessed concern about the possible weakening of organic standards under the upcoming National Organic Program Rule.

Further information about and data from OFRF's three national organic farmers' surveys are available on the OFRF website, at www.ofrf.org.

Methodology

Development

OFRF's 4th *National Organic Farmers' Survey*: *Sustaining Organic Farms in a Changing Organic Marketplace*, was developed by OFRF in conjunction with a committee of survey advisors from around the country. This team was comprised of nationally recognized organic farmers, organic farming/marketing advocates, agricultural researchers and representatives of state and federal agricultural agencies. Please refer to the Acknowledgments for a complete list of advisors. Advisors participated in the development and review of survey drafts, which were tested among individual organic farmers. Survey drafts were developed in part from OFRF's three previous national surveys, which collected data for the years 1993, 1995 and 1997. Under certain topical areas such as demographics, the same or similar questions were asked to collect longitudinal data (data over time). These results contain this comparative data where it has been collected.

However, whereas OFRF's previous surveys focused primarily on production and production research questions, our 4th *National Organic Farmers' Survey* has been the first to focus on marketing information, as well as the first to ask questions specifically about organic farmers' participation in marketing order programs, and the marketing and economic effects to organic farmers of genetically modified organisms (GMOs) in agriculture.

Target population and rate of response

In Spring 2002, a 22-page survey was mailed to 5,457 certified organic farmers in good certification standing for the 2001 production year. Addresses were obtained from 49 organic certification bodies and/or their chapters operating within the U.S., termed *full project cooperators*. Up to four mail contacts were conducted during April-May 2002, consisting of 1) a prior notification postcard; 2) an initial survey packet including cover letter and prize drawing entry; 3) a follow-up thank you/reminder postcard; and 4) a replacement survey packet was sent to a random sample of 1,000 non-respondents. 1,078 surveys were returned from the 4-part contact group, a response rate of 20%. Responses were received throughout the spring and summer of 2002.

In addition, surveys were also sent directly to eighteen certification agencies who chose to participate by delivering surveys to their own growers, termed *limited project cooperators*. These agencies represented 1,030 producers. OFRF had no control over timing or method of delivery to these producers, and additional contacts were not made to this population. 107 returns were received from this group, a response rate of 10%.

Therefore, surveys were sent to a total of 6,487 certified organic farmers, with a response rate from our combined populations of 18%.

OFRF estimates that there were approximately 7,200 certified organic producers in the U.S. in 2001. In addition to the *full* and *limited project cooperators*, fourteen certification agencies did not participate in the study. OFRF estimates that 728 certified organic farmers were represented by these non-participating certifying agencies. These agencies were:

Carolina Farm Stewardship Association
Indiana Certified Organic
California Organic Growers Association
Guaranteed Organic Certification Agency

Organic Crop Improvement Association Chapters:
- OCIA-Missouri 2
- OCIA-Montana 2
- OCIA Nebraska 4
- OCIA Wisconsin 2

Organic Forum International
Organic Growers & Buyers Association
Organic Growers of Michigan
Scientific Certification Systems
Utah Department of Agriculture

Based on these figures, OFRF estimates that the 4th *National Organic Farmers' Survey* instrument reached approximately 90% of U.S. certified organic producers in good standing for the 2001 production year.

TABULATING RESULTS

Results were tabulated utilizing a respondent population of of 1,034 certified organic producers, representing 18% of all possible respondents. In total, 1,171 surveys were returned. Of these, 134 respondents were not included in the study. Reasons for not keeping these respondents in the study included: 1) incomplete returns 2) self-disqualification/opting out and 3) changes in organic farming or marketing status.

The 4th *National Organic Farmers' Survey* was composed of seventy-six questions, most of which contained several sub-components. Each survey return received a quality assurance review, and was entered into an Access database utilizing a combination of Optimal Mark Recognition software and manual data entry. Data was re-evaluated after data entry was completed, and incomplete or inconsistent data were omitted from the results tabulation.

Closed-ended Questions. The survey results database consists of 1,061 fields of data. Most of these fields consist of responses from sixty-six closed-ended questions, where respondents could select among response categories or fill in a response of finite value. These responses are easily manipulated within the database program to determine totals, averages, overall rankings, etc.

Open-ended Questions. Ten survey questions were open-ended, where a respondent could fill in a response in his or her own words. Tabulating these responses involves a process whereby a data reviewer reads the response and assigns it to one category or among several categories. This is a partially subjective process, and the results of these questions should be considered "softer" than those of closed-ended questions. For example, when farmers were asked: W*hat information or services would have the greatest positive effect on the economic sustainability of your organic farming operation*?, a respondent might indicate, "consumer education about organic food," and this response would be assigned directly to that category. Another respondent might say "consumer education about local organic food, and the negative impacts of industrial farming." This response would be tabulated under *consumer education about organic food*, *consumer education about local food production*, and *consumer education about farming systems in general*. When reviewing responses to open-ended questions, it should be considered that:

1) The content of more complex responses is broken down by this process into component parts; and

2) The assignment of responses into categories is often subject to a decision-making process by the reviewer.

Responses to open-ended questions are presented in charts, and selected responses are provided in growers' own words, to provide examples of the types of responses received. Responses were chosen that were representative of the group overall, from a variety of geographic areas and production types. A new feature of these survey results is that complete sets of open-ended responses are available on OFRF's website, at www.ofrf.org.

DATA LIMITATIONS

There are four basic types of error that any survey is subject to. These are outlined below, followed by an evaluation of how each might affect the 4th National Organic Farmers' Survey results, based on what we know about our sample population and rate of response[1].

Coverage error: Coverage error occurs when the list from which a sample is drawn does not include all elements of the population being studied. OFRF's survey target population is certified organic farmers. It is estimated that the survey's sampling frame reached 90% of U.S. certified organic farmers in good standing for the year 2001. A question to ask when evaluating this type of error is: *Would organic farmers from the non-participating certification agencies differ in any way from those from the participating agencies*?

Sampling error: Sampling errors occur when only a subset or sample of an entire population being studied is surveyed, instead of conducting a census. Generally, the larger the sample size, the smaller the sampling error. The survey sample size is almost as large as the entire population being studied (again, estimated at 90% of the actual population being studied).

Measurement error: Measurement error occurs when a respondent's answer to a given question is inaccurate, imprecise, or cannot be compared in any useful way to another respondent's answers. Measurement error can be a result of the survey itself (a confusing or poorly designed question) or the respondent (deliberately or inadvertently answering incorrectly). All responses were reviewed for possible response errors, and where responses were clearly inaccurate (e.g.where response percentages that needed to total 100% failed to do so), they were excluded from the results. In these results, original survey questions and response methods are provided to help readers evaluate the relationship between the question and the response.

Non-response error: Non-response error occurs when a significant number of people in the survey sample do not respond to the questionnaire and are different from those who do in a way that is important to the study. The 4th National Organic Farmers' Survey received a total response rate of 18%, representing approximately 14% of the estimated 7,200 farms that were certified organic in 2001. Questions to ask when evaluating this type of error are: *Does the response population accurately represent the entire population of certified organic farmers*? *How might the respondents differ from the nonrespondents*? For example, almost 20% of our respondents indicated that they have graduate degrees. Are individuals with graduate degrees more likely to respond to this survey? Possibly, but not necessarily. Is *consumer education about organic farming* as important to non-respondents as it is to those responding?

One thing we do know about our response population, by comparing our survey data with other data that is now available from USDA, is that our respondent population on average tends to farm smaller-scale operations than the organic farming population as a whole. This is based on a comparison with data collected by the USDA Economic Research Service, available in their report, U.S. *Organic Farming in* 2000-2001: *Adoption of Certified Systems*, by Catherine Green and Amy Kremen. Comparative figures from that report are provided in our acreage tables to help readers identify these differences.

In addition to *overall* non-response error, *item* non-response must also be considered. For all questions, and in most cases for individual categories and sub-categories within each question, the number of responses received is indicated.

[1] Error definitions are from: Salant, Dillman, *How to Conduct Your Own Survey* (Wiley, 1994).

Evaluation of Methods

In 2003, Washington State University's Social and Economic Sciences Research Center conducted a qualitative assessment of OFRF's survey methods, and found that, "Overall OFRF has adhered to sound survey research methodology." The major critique provided in this assessment was the survey's response rate, which may potentially lead to non-response error, and survey complexity, which may lead to measurement error. We include this information in the spirit of disclosure, so that readers can evaluate the utility of the data provided here.

Executive Summary

Since 1993, OFRF has conducted four national surveys of certified organic farmers. OFRF's National Organic Farmers' Surveys have collected data about organic farmers and farming for the years 1993, 1995, 1997 and 2001. Each survey has developed a unique set of information about organic farming from the organic farmers' perspective. While the content of each of our surveys has varied somewhat from year to year, traditionally, OFRF surveys have asked questions about organic farmers' production-oriented research priorities, information needs, and on-farm practices.

The objectives of OFRF's *Fourth National Organic Farmers' Survey: Sustaining Organic Farms in a Changing Organic Marketplace*, represent a departure from our previous data collection efforts. This has been in response to a growing, industry-wide interest in gaining information and insight about organic farmers' experiences in the marketplace. This data set is a first attempt at developing information about organic farmers' experiences, attitudes, and needs around marketing organic products. We hope this information leads to a better understanding of organic farmers' marketing needs, and to targeted efforts that support the economic sustainability of organic farming systems.

Methodology

In spring 2002, a 22-page survey was sent to 6,487 certified organic farmers throughout the United States. The survey was mailed to 5,457 certified organic farmers whose addresses were obtained from 48 organic certification bodies and/or their chapters operating within the U.S., termed full project cooperators. In addition, surveys were sent directly to eighteen certification agencies who chose to participate by delivering surveys to their own growers, termed limited project cooperators--these agencies represented 1,030 producers. Overall, 1,171 surveys were returned from both groups. The response rate from our combined populations was 18%.

The format of these survey results is similar to the results of OFRF's three previous national surveys. In many cases the same or similar questions are asked as in previous years. For example, demographic questions remained largely the same. Comparisons with the results of previous years' survey data are provided where applicable. However, these survey results also include entirely new material in the areas of organic marketing and market conditions, marketing orders, and organic farmers' experiences related to the presence of genetically modified organisms (GMOs) in agriculture.

The results of the *Fourth National Organic Farmers' Survey: Sustaining Organic Farms in a Changing Organic Marketplace*, are organized into eight topic areas: Farm Profile; Production and Product Details; Marketing Organic Products; Organic Market Conditions, 2001; Information and Services; Marketing Orders and Organic; GMOs and Organic; and More About You and Your Farm. Following are some of the highlights from each topic area.

Farm Profile

Respondents were asked to provide basic information about their farm, including: whether the farm produced and marketed certified organic product in 2001; farm acreage (total acres, acres farmed under organic conditions, and acres certified organic); organic acres owned and leased/not owned; acres in production under various categories (such as "vegetables") and percent of sales in relationship to that acreage; whether any conventional products were produced on the farm; whether the farm produced compost for on-farm use and/or for sale; business structure of the farm operation; and state in which their farm is located. Highlights are:

Percentage of producers not certified

- 5% of the population cooperating in this study indicated that they farmed organically, but were not certified in 2001.

Acreage summaries

- 82% of the respondent population identified their farmland as managed solely under organic practices, with acreage in production under the following categories:
    - 66% certified organic only;
    - 15% certified organic and organic, non certified/transitional; and
    - 1% non-certified/transitional only.
- More than half of OFRF survey respondents (54%) farmed fewer than 50 certified organic acres.
- One quarter of respondents (25%) farmed between 50 and 179 certified organic acres.
- 21% of respondents farmed 180 certified organic acres or more.
- Survey returns represented 184,898 certified organic acres, representing approximately 8% of total certified acres for the year 2001, based on comparison with USDA Economic Research Service data collected for 2000-2001.
- A comparison with data from previous OFRF surveys shows that producers with certified organic farms under 50 acres have become a smaller percentage of OFRF's survey respondent population, dropping from 63% in 1993 to 54% in 2001.

Organic land ownership

- 92% of respondents own some portion of the organic land they are farming.
- 65% own all of their organically farmed land.

Organic acres by production category, and compared with percent sales

- 43% of respondents identified 9,022 acres under vegetable production, representing 5% of the acreage identified under all categories. Acres in vegetables produced 29% of farm sales identified by the respondent population.
- 27% of respondents identified 46,741 acres in pasture, grazed land and livestock facilities, representing 26% of the acreage identified under all categories. Acres in livestock production produced 7% of farm sales identified by the respondent population.
- As part of our acreage/farm sales question, we also asked respondents to identify cover-cropped acres. Almost one-fifth of respondents, 19%, cover-cropped some portion of their farmland the entire growing season. The cover cropped area represented 5% of total acreage for the respondent population.

Other farm products produced: conventional products and compost

- 36% of respondents indicated that they produced some conventional products on their farm. Those products identified most frequently were grains/alfalfa/hay, eggs, tree or vine fruit or nut crops, and beef.

- 31% of our respondent population indicated that they produce compost for on-farm use.

Business structure of farm operation

- 94% of respondents' farms are family-based operations, including single family operations, family farm partnerships or family farm corporations

Survey returns by state

Surveys were returned from 44 states. States not represented were: Alabama, Delaware, Georgia, Mississippi, South Carolina and Tennessee. States with the greatest number of returns were California, Iowa, New York, Ohio, Washington and Wisconsin,

Organic Production and Product Details

SECTION 2

Section 2 requested information regarding organic farm products produced in the following categories: Herb, ornamental, greenhouse and specialty crops and products; Vegetable crops and products; Fruit, nut and/or tree crops and products; Field crops and products; Livestock products; and Value-added products. Detailed product information under each of these categories was requested, including specific items produced, and the proportion of these items that were sold or used in each of the following ways: sold as fresh or commodity product, sold as value-added product, sold to a processor or as propagation stock, or used on-farm. Key results were:

Herb, ornamental, greenhouse and specialty crops and products

- 33% of survey respondents produced organically grown herb, floriculture, ornamental or greenhouse products, mushrooms and/or honey in 2001. Approximately 67%, based on area of production, were sold as fresh market product, 6% of these products were sold as value-added product, and 11% were sold to a processor. 2% were sold as seed or propagation stock and 15% were used on-farm, with the greatest percentage of on-farm products used being vegetable starts.

Vegetable crops and products

- 43% of respondents produced organically grown vegetables in 2001. 74% were sold as fresh market product, 3% were sold as value added product, 19% were sold to a processor and another 3% were sold as seed or propagation stock.

Fruit, nut and/or tree crops and products

- 36% of respondents produced organically grown fruit, nut and/or tree crops in 2001. 55% were sold as fresh market product, 19% were sold as value-added product, 26% were sold to a processor and less than 1% were sold as seed or propagation stock.

Field crops and products

- 45% of respondents produced organically grown grains, alfalfa, mixed hay and/or other field crops in 2001. 36% of these products were sold as commodities, 9% were sold as value-added products, 25% were sold to a processor, 14% were sold as seed or propagation stock, and 16% were used on-farm.

Livestock products

- 20% of respondents produced organic livestock products in 2001. 24% of these products were sold as commodities, 32% were sold as value-added products, 22% were sold to a processor and 23% were sold as breeding stock.

Value-added products

- 40% of respondents produced products that were eventually value-added on-farm or by another processor.
- 15% of respondents derived more than 50% of their farm's gross sales from value-added products.

SECTION 3 Marketing Your Organic Products

In this section, we asked organic producers for information about what marketing channels they use to sell their organic products. These were grouped under the broad categories of consumer-direct, direct-to-retail, and wholesale markets, and these categories in turn were sub-divided into more than 15 subcategories, such as farmers markets, restaurants, natural food stores and private grain elevators. New to our 4th national survey, responses to these questions were also requested by product category (vegetables, fruit/nuts, grains, & livestock products). We also asked about the geographic range of their organic farm product sales, based on buyer location, and the point in time of price determination, such as on the "spot" market (at point of sale) or on forward contract. Lastly, we asked about organic producers' plans to increase or decrease sales through various channels, and the kinds of marketing aids that they use. Selected results are:

Marketing channels by product category (example: vegetables, etc.)

- 80% of respondents who produced vegetable, herb, floriculture, mushroom and/or honey products sold them through consumer-direct channels; the estimated volume sold through these channels based on acres produced was 13%.
- 54% of respondents sold these products through direct-to-retail channels; the estimated volume sold through these channels, based on acres produced was 53%.
- 69% of respondents sold these products through wholesale markets; the estimated volume sold through these channels, based on acres produced was 34%.

Buyer location

- Respondents predominantly sold vegetable products locally; 79% of vegetable products were sold within 100 miles of the farm.
- Organic livestock products tended to be sold furthest from the farm of all products, with 47% sold more than 500 miles from the farm.

Point/timing of price determination

- 86% of vegetable products produced were priced at delivery (on the"spot" market) with no forward contract, while 14% of product was sold under forward contracts.
- 39% of fruit/nut/tree products were sold under forward contracts.
- 62% of grain and field crop products were sold under forward contracts.
- 20% of livestock products were sold under forward contracts.

Plans to increase or decrease volume marketed through various marketing channels

- The greatest percentage of respondents indicated that they plan market channel increases in direct-to-consumer markets (51% of respondents) and direct-to-retail markets (47% of respondents), followed by sales to local markets within 100 miles of the farm (45% of respondents).

- Respondents were most interested in expanding their volume of organic products marketed, followed by an interest in expanding the number of organic acres that they have in production.

Marketing aids

- Respondents indicated most frequently using *word-of-mouth* (with 75% of respondents using this method); and an *organic certification label* (48% of respondents using) and *telephone banking* to potential buyers (31%) as marketing aids.

- "GMO-F*ree*" *labeling* (used by 5% of respondents) and *additional label claims* (used by 8% of respondents) were identified least frequently as marketing aids used by respondents.

Organic Market Conditions

SECTION 4

We asked organic producers to tell us about their experiences in the organic marketplace: about whether markets for their organic products are expanding or contracting (and by how much); whether organic prices are increasing or decreasing (and again, by how much), and their experience with obtaining organic price premiums. We asked about whether their organic product is ever sold into the conventional marketplace, and if so, why. We asked them to identify yields and prices obtained for selected products. We asked about what circumstances, if any, make it difficult to obtain organic price premiums, and what production, market or regulatory conditions most affect their organic operations profitability and economic sustainability. We asked them to describe what they anticipated as either positive or negative impacts of the USDA National Organic Program Final Rule on their organic farming operation. Highlights are:

Organic market expansion or contraction

- 44% of respondents reported organic market expansion rates of greater than 5% for the year.
- 9% of respondents reported an organic market expansion rate of 20% or more.

Organic price trends

- 26% of respondents indicated that their prices went up in 2001.
- 15% indicated that their prices went down.
- The largest number of respondents, 52%, indicated that their prices held steady for the year.

Obtaining organic price premiums

- 41% of respondents said they are able to obtain organic price premiums on 100% of their organically grown products.
- 86% of respondents indicated that they received a premium price for some portion of their organically grown products.
- 8% of respondents were unable to obtain an organic price premium on any of their organ ically grown products.

Incidence of sales of organic product into conventional markets

- 37% of respondents indicated that some amount of their organically grown product was sold into the conventional market.

- Of those respondents who sold organically grown product into the conventional market, the greatest percentage (20% of all respondents) indicated that 1-25% of their organic product was sold that way.

- Of those respondents indicating that they sold organically grown product into the conventional market, the majority (51%) indicated that they did so because an organic market was unavailable.

- 32% said they did so because the conventional price was good or high.

Production, market or regulatory conditions that serve as problems specific to delivering organic product to market, or to farm profitability.

The eight top-ranked responses, out of 32 categories, were:

- *Weather-related production losses*
- *Organic certification costs*
- *Obtaining organic price premiums*
- *High input costs*
- *Lack of organic marketing networks*
- *High labor costs*
- *Weed-related production losses*
- *Production losses due to pests or disease*

Anticipated impacts of the USDA National Organic Program Final Rule on organic producers (open-ended response structure)

- The greatest percentage of respondents, 25%, indicated that they experienced and/or anticipated *no change or problem* associated with the upcoming USDA NOP Rule.
- 16% indicated that the *organic seed requirement i*s a potential problem; that organic seed is not available.
- 10% identified *certification paperwork and record-keeping* as excessive.
- 9% indicated that *composting standards* are unrealistic or unworkable.

SECTION 5 Information and Services

In Section 5 we asked organic farmers about the information and services that they use specific to organic marketing. We asked them to indicate what resources they use the most and to rank their usefulness; we asked about what information or services would be most useful to improving their ability to market organic products and to support their farm's economic sustainability. We asked about information tools and services: whether and how they use the Internet, the role of federal farm programs to their organic operations, and about organizational relationships--what farming groups they belong to. Highlights include:

Most useful information resources

Respondents indicated that *other farmers* are the most useful resource for marketing information and use them most frequently.

Respondents identified *other farmers*, *conferences*, *workshops and seminars*, and *newsletters/magazines* as their most useful information resources for organic marketing information. I*ndividual customers/consumers* and I*nternet-based resources*, however, were used the most frequently.

- Public resources that normally provide agricultural information services to farmers--*university-based resources*, *state agricultural departments* and USDA--together were ranked as the least useful resources to organic farmers for organic marketing information, with USDA ranked at the bottom of the list as the least useful resource. These resources were also among those used the least frequently by respondents.

Market-related information or services that are most important to organic farmers

- Consistently, over the course of OFRF's four national surveys, respondents have identified *consumer education about organic food and farming* as the most important means of improving their markets.

- Consistent with responses to other parts of this survey, respondents emphasized interest in *local and regional organic market developmen*t, identified as the second most useful service.

- *Organic-specific Research & Extension services*, *organic price reporting services* and *directories of organic product buyers* were also identified as useful services and information.

Internet access and usage

- 78% of respondents indicated that they have Internet access, with 72% identifying that they have access *at their home or farm*.

- Respondents use the Internet most frequently *to check weather*, with 61% of respondents using the Internet for this purpose.

- 50% of respondents use the Internet *to look for organic market information*.

- 28% of respondents use the Internet *to sell their organic farm products*.

Farm program participation

- 47% of respondents indicated that they did not participate in any farm-related government programs (based on the list of programs provided), over the past five years.

- Respondents identified F*arm Service Administration commodity payment programs* as the program they most frequently participate in, with 34% of respondents participating.

- 21% participated in *federal crop insurance programs*.

- 19% participated in *federal disaster payment programs*.

- Small percentages of respondents identified organic *certification cost share* and SARE as pro grams they've participated in.

Farm organization membership

- 84% of respondents indicated that they belong to at least one farm organization or trade group.

- 40% indicated that they belong to an organic-specific association.

- Almost as many, 38%, indicated that they belong to the Farm Bureau.

- 8% identified themselves as members of the Organic Trade Association.

Marketing Orders and Organic

SECTION 6

We asked organic farmers about their relationships to federal and state marketing orders, and their attitudes about them. Highlights are:

- 9% of respondents indicated that they participate in marketing order programs.

- 5% indicated participation in federal marketing order programs.

- 4% indicated participation in state marketing order programs.

- 55% of respondents participating in marketing orders indicated that *benefits to organic producers are not equal* to the benefits received by conventional producers.

- 48% indicated that funding should be *earmarked for organic marketing*.

- 40% indicated that funding should be *earmarked for organic research*.

- 35% indicated that *exemptions should be developed for organic producers.*

SECTION 7 GMOs and Organic

Organic farmers were asked about their experiences concerning the presence of genetically modified organisms (GMOs) in agriculture and the subsequent effect on production and marketing of their organic farm products. Respondents were also asked about their attitudes and concerns regarding GMOs and whether they feel that their farm products are protected from contamination by the current regulatory process in place.

Respondents' perception of GMO contamination risk to organic farm products

- 46% of respondents indicated that they believe the risk of contamination of their organic farm products by GMOs is *moderate*, *high* or *very high*.

- Respondents indicated that they believe *contaminated seed stock* (rated by 48% as a moderate to high risk) presents the greatest GMO contamination risk, followed by GMO *pollen drift in the field* (rated by 42% as a moderate to high risk).

- These are followed by *contaminated farm inputs* (30% rated as moderate to high risk), *contamination at processor or in processing* (23% rated as moderate to high risk) and *contaminated equipment* (8% rated as moderate to high risk).

Measures taken by organic farmers to prevent GMO contamination

- 48% of respondents indicated that they have taken some measures to prevent GMO contamination of their organic farm products.

- The greatest percentage (24%) indicated that they have *communicated with neighboring farmers.*

Additionally, a significant percentage of respondents have taken measures that represent potential economic impacts to their operation, including:

- 19% have *increased buffer zone size*.
- 15% have *adjusted timing of planting crops.*
- 9% have *changed cropping locations.*

GMO testing of organic farm inputs and products

- 27% of respondents indicated that some entity has requested testing of some portion of their organic farm's seed, inputs or products.

- 2% of all respondents (f=18) indicated receiving a *positive test result for* GMO *contamination* of some seed, inputs or organic farm products.

Economic costs to organic farmers of of GMOs in agriculture

- 8% of respondents indicated bearing some direct economic costs of GMOs.
- 4% indicated bearing the cost of GMO testing.
- 2% indicated bearing the cost of lost sales due to perceived or actual contamination.

Regulatory framework: is an adequate framework in place to protect organic farmers from GMO contamination?

- 55% of respondents indicated *no*.
- 35% of respondents said they *don't know*.
- Only 10% said *yes*.

More about you and your farm

SECTION 8

Similar to the Farm Profile section (Section 1), Section 8 requested personal and demographic information about our organic farming respondents. We asked about farm ownership; about the number of years respondents have been farming, farming organically, and how long their farm has been certified organic. We asked respondents why they choose to farm organically. We asked how they began farming organically…as a transitional farmer from conventional farming systems or as organic from the start. We asked whether they farm full or part time, whether they work off farm and if so, why; the number of family and non-family employees on their farm; the percentage of net household and gross farm income from organic operations; their level of education and their age and their gender. Highlights are:

Farm tenureship

- 94% of respondents are owners or co-owners of their organic farm.

Number of years farming, years farming organically, and years certified organic

- 45% of respondents have been farming for more than 20 years.
- 13% of respondents have been farming organically for more than 20 years.
- 79% of respondents' farms have been certified organic for 10 years or less.
- 17% of respondents' farms have been certified organic for between 11 and 20 years.
- 2% of respondents' farms have been certified organic for more than 20 years.

Why respondents choose to farm organically

Out of 17 categories provided, respondents identified their most important reasons for farming organically as:

- Land stewardship and ecological sustainability.
- Chemical avoidance for family & farmworker health.
- Chemical avoidance for environmental health.
- Organic represents good farming practices--like the results.
- Ecological principles: view farm as ecological system.

How respondents began farming organically

- 51% of respondents transitioned from conventional farming practices.
- 49% began farming as organic farmers.

Farm employees and employment

- 67% of respondents indicated that they are farming full time.
- A total of 7,985 employees were tabulated, with 33% (2,608) being farm-family employees.
- Of 1,325 year-round employees tabulated from responses, 87% were farm-family employees.
- 48% of respondents indicated that they have no off-farm employment.
- For those survey respondents who did work off the farm, their top reasons for doing so, in descending order of response frequency, were:
  - As a secondary income source (22%).
  - As a primary income source (21%).
  - To subsidize farm & capital investments (20%).

Net household and gross farm income from organic operations

- In 2001, 65% of respondents received 50% or less of their household income from organic farming.
- 43% of organic farms grossed $30,000 or more.

Education, age and gender.

- 81% of respondents indicated receiving some level of college training.
- More than one-quarter hold bachelors degrees.
- One-fifth hold graduate degrees.
- The average age of respondents is 51 years.
- 22% of OFRF survey respondents are women.

Farm Profile

Did your farm produce and market certified organically grown products in 2001? (*Select one response.*) I*f your farm did not produce and/or market certified organic products in* 2001*, what, if any, changes took place in your farming operation and why?*

·Q1·

Table 1.1a. Frequency and percentage of farmers who cooperated in the study that produced and marketed certified organic products in 2001 (study eligibility). (1,171 respondents.)

Did your farm market certified organic products	f	%
Yes	1,034	**88%**
No	137	**12%**
Total	1,171	**100%**
Nonresponses =14		

Table 1.1b Reasons why some respondents did not produce or market certified organic products in 2001. (133 respondents.)

Reasons for not marketing certified organic products in 2001	f	%
This is an organic farm, but was not certified in 2001	55	**41%**
This was a certified organic farm, but I/we are no longer farming	22	**16%**
This was a certified organic farm, and is still being farmed, but not organically	16	**12%**
Other reasons*	40	**29%**

**Other reasons included*: Did not produce and/or market certified organic product that particular year (f=14); in transition to organic (f=11); crop failure/weather problems such as drought/hail/frost (f=6); personal circumstances unrelated to farming concerns (f=6); not a farming operation (are a handler or processor) (f=2); farm was fallowed for the year (f=1).

Table 1.1a summary

Study eligibility.
Question 1 identified respondents' eligibility for the study, based on whether their farm produced and marketed certified organic products in 2001.

- **88% (f=1,034) of farmers cooperating in the study (from a total of 1,171 surveys returned) were identified as eligible for inclusion in the study, and were included in our "respondent population."**
- **12% of those cooperating in the study (f=137) were identified as ineligible for the study.**

Table 1.1b summary

Reasons why some respondents did not produce or market certified organic products in 2001.

- **Study cooperators who were identified as "ineligible" in most cases identified their own reasons for not producing or marketing certified organic products in 2001 (f=133).**
- **The majority of those (41% of those not producing and marketing organic products, representing 5% of those cooperating in the study) indicated that they farmed organically, but were not certified in 2001.**

N*ote*: Farmers in transition to organic were divided in their participation in this study; some participated in the study, and some opted out.

·Q2·

What was your farm's production acreage in 2001? *Respondents filled in the number of acres farmed in the following four categories*: 1) N*umber of acres certified organic*; 2) N*umber of organically-farmed acres not certified, or in transition to certified organic*; 3) N*umber of acres farmed conventionally*; *and* 4) T*otal number of acres farmed.*

Table 1.2a summary

Acres farmed—sum, average and median of farm acreage by production status categories, and by total acres farmed.

- **61% of total acres represented were certified organic (184,898 acres).**
- **9% of acres were organic, non-certified/transitional (27,711 acres).**
- **30% were farmed conventionally (91,504 acres).**

N*ote*: The "total number of acres farmed" was 315,435 acres. This is slightly higher than the sum of what respondents presented as certified organic, organic non-certified, and conventional acres, which comes to 304,113 acres. The slightly higher figure, "total number of acres farmed" may include non-farmed land and outbuildings.

Table 1.2b summary

Production status of farm land.

- **82% of respondents identified their farmland as managed solely under organic practices under the following categories:**
  - **66% certified organic only;**
  - **15% certified organic and organic, non certified/ transitional; and**
  - **1% non-certified/ transitional only.**
- **18% of respondents indicated farming acreage managed under both organic and conventional production practices:**
  - **9% certified organic, conventional and transitional;**
  - **9% certified organic and conventional; and**
  - **<1% conventional and transitional.**

Table 1.2a Acres farmed—sum, average and median of acres farmed by production status categories, and by total acres farmed. (1,014 respondents.)

Production status category	f	Acres: Sum	Acres: Average	Acres: Median
Number of acres certified organic	1,002	184,898	185	38
Number of acres farmed organically but not certified, or in transition to organic	250	27,711	111	31
Number of acres farmed conventionally	176	91,504	520	155
Total number of acres farmed	1,003	315,435	277	40

Table. 1.2b Production status of farm land (certified organic; organic, non-certified/in transition to organic, or conventional) by response frequency per category. (1,014 respondents.)

Production status of farm land	f	%
Certified organic only	677	**66%**
Certified organic and non-certified/transitional	151	**15%**
Certified organic, conventional and non-certified/transitional	87	**9%**
Certified organic and conventional	87	**9%**
Non-certified/transitional only	10	**1%**
Conventional and non-certified/transitional	2	**<1%**
Total	1,014	**100%**
Nonresponses = 20		

Table 1.2c Size of farms, presented by acreage ranges of total acres farmed and of production status categories. (1,014 respondents.)

Acreage ranges	Total number of acres farmed f=1,003	Number of acres certified organic f=1,002	Number of acres farmed organically but not certified, or in transition to organic f=250	Number of acres farmed conventionally f=176
<1-5	23%	17%	20%	9%
> 5 to 19	16%	22%	18%	12%
20 to 49	12%	15%	20%	14%
50 to 179	21%	25%	25%	18%
180 to 499	16%	14%	14%	20%
500 to 999	6%	4%	1%	15%
1000 to 1999	3%	2%	1%	7%

Table 1.2d Size of certified organic farm acreage, by acreage ranges, from OFRF's four National Organic Farmers' surveys, for the years 2001, 1997, 1995 and 1993, and compared with acreage range data for all US farms from the USDA 1997 Census of Agriculture.

Acreage ranges	4th OFRF survey (2001) f=1,003	3rd OFRF survey (1997) f=1,182	2nd OFRF survey (1995) f=711	1st OFRF survey (1993) f=545	USDA Census of Agriculture* (1997)
< 1 to 49	54%	61%	58%	63%	30%
50 to 179	25%	20%	22%	19%	31%
180 to 499	14%	13%	13%	10%	21%
500 to 999	4%	3%	3%	4%	9%
1000 to 999	2%	2%	3%	2%	5%
2000+	1%	1%	1%	2%	4%
	100%	100%	100%	100%	100%

*Source: USDA 1997 Census of Agriculture, National Agricultural Statistics Service.

Table 1.2e Size of farms--average number of acres certified organic, for respondents to OFRF surveys, for the years 2001, 1997, 1995 and 1993.

	4th OFRF survey (2001) f=1,003	3rd OFRF survey (1997) f=1,182	2nd OFRF survey (1995) f=938	1st OFRF survey (1993) f=545
Average certified organic acres	185	141	164	187

Table 1.2c summary

Size of farms—by acreage ranges.

- **More than half of OFRF survey respondents (54%) farmed fewer than 50 certified organic acres.**
- **One quarter of respondents (25%) farmed between 50 and 179 certified organic acres.**
- **21% of respondents farmed 180 certified organic acres or more.**

Table 1.2d summary

Size of certified organic farm acreage—by acreage ranges, compared with OFRF survey data for previous years, and USDA figures for all U.S. farms.

- **Response data suggests that certified organic farms under 50 acres are becoming a smaller percentage of organic farms as a whole (falling from 63% in 1993 to 54% in 2001). The percentage of respondents' farms between 50 and 499 acres has risen from 29% in 1993 to 39% in 2001.**
- **The proportion of small-scale organic farms, as represented by OFRF's survey respondent population, appears greater than farms overall in the U.S., based on comparing size of farms of OFRF survey respondents with acreage ranges for all farms from the USDA 1997 Census of Agriculture.**

Note: The size of organic farms represented by OFRF's survey respondent population is somewhat smaller than for the entire population of organic farms in the U.S. as a whole, based on a comparison with organic acreage data collected by the USDA Economic Research Service for the years 2000-2001. (This information is included in Table 1.10.)

Table 1.2e summary

Average size of farms (certified organic acres), compared with OFRF survey data for previous years.

- **The average certified organic farm acreage of OFRF survey respondents in 2001 is similar to that of 1993; for the years 1997 and 1995 the average of organic acres farmed was somewhat lower.**

·Q3·

How many organically farmed acres were owned by your farm in 2001?
How many acres were rented, leased or used free of charge? (*Fill in response.*)

Table 1.3a summary

Organic land tenureship—total acres and response frequency by ownership category.

- **92% of respondents (f=920) own some portion of the organic land they are farming.**
- **65% (f=649) own all of their organically farmed land.**
- **35% of respondents (f=353) rent, lease, or use free of charge some portion of the organic land they are farming, with 8% of respondents (f=82) farming all of their organically farmed land under this category.**
- **27% of respondents (f=271) farm a combination of owned and rented land.**

Table 1.3b summary

Organic land tenureship—sum, average and median by ownership category.

- **The size of rented parcels tends to be larger than owned parcels, as shown by average acres farmed.**

Table 1.3a Organic land tenureship: Total acres and response frequency by ownership category. (1,002 respondents.)

Ownership category	f	%	Organically farmed acres, owned	Organically farmed acres, not owned
Respondents only owning organically farmed land	649	**65%**	61,297	**
Respondents both owning and leasing organically-farmed land	271	**27%**	72,279	60,062
Respondents only leasing organically farmed land	82	**8%**	**	17,845
Totals			133,576	77,907
Nonresponses = 32				

Table 1.3b Organic land tenureship: Sum and average of organically farmed acres by ownership category. (1,002 respondents.)

	Organically farmed acres, owned (f=920)	Organically farmed acres, not owned (f=353)
Sum	133,576	77,907
Average	145	221
Nonresponses = 32		

How many organic acres did your farm produce in the the following categories in 2001? *What percent of total organic farm sales did each category represent?* (*Fill in acres and percentages for each category.*)

·Q4·

Table 1.4 Organic acres represented by production category, and percentage of income derived from acres per each category. (834 respondents.)

	Respondents indicating production in this category, frequency and % (f=834)		No. of acres represented in this category and % of total acres represented		Percent of organic farm sales in this category in 2001
Production category	**f**	**%**	No.	**%**	**%**
Vegetable crops	362	**43%**	9,022	**5%**	**29%**
Herb crops	140	**17%**	786	**<1%**	**5%**
Nursery, floriculture and/or greenhouse crops	96	**12%**	163	**<1%**	**4%**
Apiculture	3	**<1%**	850	**<1%**	**<1%**
Wildcrafted land	26	**3%**	838	**<1%**	**<1%**
Brambles, berries	105	**13%**	457	**<1%**	**3%**
Tree or vine fruit and/or nut crops	223	**27%**	6,611	**4%**	**20%**
Grains, alfalfa, mixed hay and/or other field crops	338	**41%**	83,326	**46%**	**27%**
Pasture, grazed land, live-stock yards and facilities	226	**27%**	46,741	**26%**	**7%**
Fallow or idle (acres not in production in 2001)	171	**21%**	17,401	**10%**	**<1%**
Acres cover cropped the entire growing seasons	157	**19%**	8,071	**5%**	**<1%**
Other	66	**8%**	5,168	**3%**	**4%**

Table 1.4 summary

Organic acres by production category, and percent sales per category.

Question 4 requested acres farmed by category and then requested the percentage of sales within each category. These figures were then tabulated for the entire respondent population.

Example summaries:

- **Vegetable crops: 43% of respondents (f=362) identified 9,022 vegetable production acres, representing 5% of the total acres identified. This 5% of acreage produced 29% of total organic sales for the respondent population.**
- **Grains, alfalfa, mixed hay and/or other field crops: 41% of respondents (f=338) identified 83,326 grain, alfalfa and field crop production acres, representing 46% of the total acres identified. This 46% of acreage produced 27% of total organic sales for the respondent population.**
- **Acres cover cropped the entire growing season: Though not important to sales, we also requested the number of acres cover cropped for the season. Almost one-fifth of respondents, 19% (f=157) cover cropped some portion of their acres all season, representing 5% of the total acres identified.**

·Q5· What conventionally grown products, if any, did your farm produce in 2001?

(Select all that apply.)

Table 1.5a summary

Respondents producing conventionally grown farm products.

- **64% of respondents selected *none*, indicating that their organic farm produced no conventional farm products.**
- **36% of respondents identified specific conventional farm products produced by their operation.**

Table 1.5b summary

Conventional farm products produced.

- **Most respondents that produced conventional products produced grains, alfalfa or mixed hay (42%, f=144).**
- **Eggs, fruit and nut crops and beef were identified as the other most frequently produced conventional crops.**

Table 1.5a Respondents producing conventionally grown farm products, response frequency. (949 respondents.)

Response category	f	%
Respondents indicating that their farm produced no conventional product in 2001	604	**64%**
Respondents identifying one or more conventional products that were produced on their farm in 2001	345	**36%**
Total	949	**100%**
Nonresponses = 85		

Table 1.5b Conventional farm products produced by respondents. (345 respondents. More than one response per respondent is possible.)

Conventionally produced products	f	Percentage of all respondents f=949	Percentage of respondents producing conventional product f=345
Grains/alfalfa/mixed hay	144	**15%**	**42%**
Eggs	64	**7%**	**19%**
Tree or vine fruit or nut crops	61	**6%**	**18%**
Beef	59	**6%**	**17%**
Vegetable crops	42	**4%**	**12%**
Poultry	33	**3%**	**9%**
Dairy products	30	**3%**	**9%**
Lamb	27	**3%**	**8%**
Pork	25	**3%**	**7%**
Other	21	**2%**	**6%**
Honey	18	**2%**	**5%**
Herb Crops	16	**2%**	**5%**
Nursery/Floriculture	12	**1%**	**3%**

Did your farm produce finished compost, either for use on your farm or for sale to or use by other producers? (*Select one response.*)

·Q6·

Table 1.6 Compost produced on farm, response frequency. (1,013 respondents.)

Response category	f	%
No	661	**65%**
Yes	352	**35%**
Total	1,013	**100%**
Nonresponses = 21		

Table 1.6 summary

Compost produced on farm, by response frequency.

- **35% of respondents (based on 1,013 respondents) indicated that they produce compost either for on-farm use or for sale.**

About how much compost did your farm produce? (*Fill in response...respondents were provided the option of answering in units of tons or yards.*)

·Q7·

Table 1.7 Compost produced on farm--amount of compost produced. (328 respondents.)

Response category	f	% f=1,013	Units	f	Total	Average
Compost produced for on-farm use	325	**31%**	On farm use - tons	148	56,254 tons	380 tons
			On-farm use - yards	177	17,122 yards	96 yards
Compost produced for sale	16	**2%**	For sale - tons	6	6,912 tons	1,152 tons
			For sale - yards	10	3,940 yards	394 yards

Table 1.7 summary

Compost produced on farm—amount of compost produced.

- **Out of the 352 respondents who indicated that they do produce compost, 328 provided figures regarding the amount of compost produced and used on farm, or produced and sold.**
- **Units in both tons and yards are provided based on producers' own means of measurement.**
- **31% of our respondent population indicated that they produce compost for on-farm use; 2% indicated that they produce compost for sale.**

•Q8• Please provide a brief description of your farm operation. (*Fill in response.*)

Table 1.8 Farm description. 977 respondents provided descriptions of their organic farm operations. Selected farm descriptions are listed below. The complete list of responses, organized by region and including number of organic acres, is available on OFRF's website: *www.ofrf.org/publications/survey/4th NOFS/Q8farmdescription.pdf*

State	No. of acres	Farm description
CA	36	*Table grapes; raisins and kiwi fruit.*
CA	26	*Mainly baby lettuce; other crops especially beans grown to provide rotation and soil improvement and for farmers' markets. Most lettuce shipped out of state.*
CO	20	*Beef - 65 cows to raise calves for sale. Organic apricot and sweet cherries - bulk and market sales/ organic veggie and cantaloupe garden [farm and market sales]. Alfalfa hay for sale and own cattle to use. Oats for feed or seed. Pastures for cattle use.*
HI	20	*Macadamia nuts; honey; banana; berries and guavas.*
KY	3	*I have a 20-25 member CSA and I sell at a local farmers' market. We grow about 100 different vegetables such as lettuce; beets; corn; tomatoes; peppers; and a few herbs.*
KS	250	*We produce certified organic winter wheat.*
ME	2	*CSA market garden and wholesale veg. sales. Spinach grown in one 17' x 48' unheated greenhouse during winter. One acre of apple trees just beginning to bear.*
MI	343	*Soybeans and spelt are the main crops. Sometimes corn or rye or hay.*
MO	265	*We raise organic grain; organic hay; and conventional livestock. Grain is sold; but as land is rotated to legumes; the hay is fed to livestock. While livestock is raised organically; they are just sold conventionally.*
NE	160	*Organic feed grains; organic seed corn.*
NJ	290	*Free range poultry; organic eggs; organic vegetables and winter lettuce from greenhouses; soybeans; hay; grains; straw.*
NY	45	*Fresh vegetable and herbs; certified organic and herb transplants; ornamental annuals and perennials.*
PA	25	*Diverse vegetables and berries [40 crops] for direct market [70%] and wholesale to marketing cooperative [30%].*
SD	320	*Grow corn; oats; soybeans for grain [organic]; seed rye on oats. Stubble for winter cover and green plowdown following spring. We raise chickens for eggs and yard cleanup; raise cow-calf herd - fatten calves as slaughter beef - trying to direct market them.*
VA	200	*Mixed organic small fruits and vegetables; and conventional sheep; goats; pigs; and cattle.*
WA	70	*All tree fruits--apples; pears; cherries.*
WI	10	*Diversified vegetable; fruit; herb farm growing 25 acres of cert. org. produce. We market through CSA; upscale restaurants; natural food stores and farmers markets in Wisconsin; Illinois; and Minnesota. We grow over 150 varieties of over 40 crops.*
WI	300	*We have approximately 90 Holstein milk cows and about 90 young stock which is all heifers of all ages. We sell organic milk to CROPP.*

Which of the following business structures best describes your farm operation?
(*Select one response.*)

·Q9·

Table 1.9a Business structure of farm operation. (1,006 respondents.)

Business structure	f	%
Single family	717	**71%**
Family farm partnership	136	**14%**
Family farm corporation	90	**9%**
Partnership, other than family	26	**3%**
Corporation, other than family	21	**2%**
Educational/research farm	16	**2%**
Total	1,006	**100%**
Nonresponses = 21		

Table 1.9b Business structure of farm operation; comparison with previous OFRF surveys and USDA Census of Agriculture.

Business structure	4th OFRF survey (2001) f=1,011	3rd OFRF survey (1997) f=1,183	2nd OFRF survey (1995) f=936	1st OFRF survey (1993) f=539	USDA Census of Agriculture (1997*)
Single family	**71%**	**72%**	**67%**	**70%**	**87%**
Family farm partnership	**13%**	**15%**	**14%**	**14%**	**
Family farm corporation	**9%**	**n/a**	**n/a**	**n/a**	**
Partnership, other than family	**3%**	**3%**	**5%**	**4%**	**9%**
Corp. other than family	**2%**	**6%**	**6%**	**6%**	**4%**
Farm cooperative	**0%**	**	**1%**	**n/a**	**
Property management	**0%**	**1%**	**1%**	**1%**	**
Educational/research farm	**2%**	**1%**	**1%**	**n/a**	**

*Source: USDA 1997 Census of Agriculture, National Agricultural Statistics Service

Table 1.9a summary

Business structure of farm operation.

- **94% of respondents' farms are family-based operations, including *single family operations*, *family farm partnerships* or *family farm corporations*.**

Table 1.9b summary

Business structure—comparison with OFRF survey data from previous years and USDA 1997 Census of Agriculture figures for all U.S. farms.

- **There has not been much change in respondents' identified business structure of farming operations throughout OFRF's four surveys for the years 1993, 1995, 1997 and 2001.**

N*otes*: When comparing OFRF survey data with USDA Agricultural Census data, the business structure (type of organization) of our respondents' organic farms is relatively similar to that of all farms identified in the Ag Census.

In OFRF's survey results, combined single family and family farm partnership figures correlate closely with the Census of Agriculture "individual or family" farm category. USDA Census data shows slightly more farms in the population at large as managed by non-family partnerships.

OFRF's survey response categories changed from 1997 to 2001, separating family corporations from non-family corporations. This generated slightly different response rates for the "corporation" category.

·Q10· In what state is your farm located? (*Fill in response.*)

Table 1.10 summary

Location of farms, by state, including acres (from Question 2), by state, and compared with state-based organic farming population and acreage data derived from USDA-ERS.

- **Surveys were returned from 44 states. States not represented were: Alabama, Delaware, Georgia, Mississippi, South Carolina and Tennessee. States with the greatest number of returns were: California (f=139), Washington (f=94), Wisconsin (f=85), New York (f=70), Iowa (f=57) and Ohio (f=48).**
- **States with the greatest proportional representation, based on acres in organic production (from USDA-ERS figures) were: Massachusetts (75% of organic acres represented); West Virginia (67% of organic acres represented), Louisiana (35% of organic acres represented), Nevada (31%), and Nebraska (30%).**

Continued, next page...

Table 1.10 Location of farms, by state; percent surveys sent and returned, by state; acreage represented within each state; and a comparison with state-based USDA-ERS organic producer data for 2000-2001.

Surveys sent and returned, by state, and farm acreage represented						Comparison with USDA Economic Research Service organic producer and acreage figures for 2001*		
State	Surveys sent (6,489)	Surveys returned (1,034)	% returned from this state	% of all returns	2001 certified organic acreage (from Q2)	ERS 2001 Certified producer estimates	ERS 2001 certified organic acreage data	OFRF acreage/ ERS acreage
Alabama	2	0	**0%**	**0%**	0	2	35	**0%**
Alaska	7	2	**29%**	**0%**	17	5	168	**10%**
Arizona	32	1	**3%**	**0%**	10	20	8,933	**0%**
Arkansas	22	1	**5%**	**0%**	40	25	24,848	**0%**
California	869	139	**16%**	**13%**	21,478	1011	163,158	**13%**
Colorado	219	46	**21%**	**4%**	8,287	228	581,614	**1%**
Connecticut	57	15	**26%**	**1%**	142	56	1,430	**10%**
Delaware	1	0	**0%**	**0%**	0	-	-	**-**
Florida	65	8	**12%**	**1%**	124	90	12,059	**1%**
Georgia	0	0	**0**	**0%**	0	22	546	**0%**
Hawaii	116	18	**16%**	**2%**	178	108	736	**24%**
Idaho	106	16	**15%**	**2%**	22,904	134	84,048	**27%**
Illinois	216	19	**9%**	**2%**	2,517	118	21,324	**12%**
Indiana	27	5	**19%**	**0%**	656	49	4,175	**16%**
Iowa	378	57	**15%**	**6%**	8,461	384	80,354	**11%**
Kansas	76	13	**17%**	**1%**	4,147	74	29,480	**14%**
Kentucky	72	16	**22%**	**2%**	752	72	6,552	**11%**
Louisiana	31	6	**19%**	**1%**	34	18	96	**35%**
Maine	228	42	**18%**	**4%**	1,133	244	9,785	**12%**
Maryland	70	11	**16%**	**1%**	1,053	77	3,590	**29%**
Massachusetts	80	12	**15%**	**1%**	957	84	1,269	**75%**
Michigan	139	19	**14%**	**2%**	4,690	150	46,485	**10%**
Minnesota	340	18	**5%**	**2%**	5,502	421	103,297	**5%**
Mississippi	0	0	**0**	**0%**	0	-	-	**-**
Missouri	38	11	**29%**	**1%**	1,407	83	13,310	**11%**
Montana	90	11	**12%**	**1%**	9,497	83	209,025	**5%**
Nebraska	98	19	**19%**	**2%**	13,946	108	47,003	**30%**
Nevada	21	4	**19%**	**0%**	604	20	1,954	**31%**
New Hampshire	51	10	**20%**	**1%**	62	55	510	**12%**
New Jersey	47	7	**15%**	**1%**	687	60	6,982	**10%**

Surveys sent and returned, by state, and farm acreage represented						Comparison with USDA Economic Research Service organic producer and acreage figures for 2001*		
State	Surveys sent (6,489)	Surveys returned (1,034)	% returned from this state	% of all returns	2001 certified organic acreage (from Q2)	ERS 2001 Certified producer estimates	ERS 2001 certified organic acreage data	OFRF acreage/ ERS acreage
New Mexico	88	16	**18%**	**2%**	569	120	42,113	**1%**
New York	258	70	**27%**	**7%**	10,117	264	45,086	**22%**
North Carolina	1	1	**100%**	**0%**	130	63	1,377	**9%**
North Dakota	152	9	**6%**	**1%**	8,008	176	159,300	**5%**
Ohio	356	48	**13%**	**5%**	6,582	265	41,460	**16%**
Oklahoma	13	2	**15%**	**0%**	2	17	3,922	**0%**
Oregon	226	44	**19%**	**4%**	3,044	231	27,501	**11%**
Pennsylvania	283	42	**15%**	**4%**	3,682	281	20,984	**18%**
Rhode Island	37	7	**19%**	**1%**	27	35	210	**13%**
South Carolina	0	0	**0**	**0%**	0	4	14	**0%**
South Dakota	103	13	**13%**	**1%**	10,541	69	57,417	**18%**
Tennessee	1	0	**0%**	**0%**	0	9	300	**0%**
Texas	136	23	**17%**	**2%**	7,490	170	266,320	**3%**
Utah	39	3	**8%**	**0%**	5,704	27	33,530	**17%**
Vermont	256	34	**13%**	**3%**	2,744	251	30,659	**9%**
Virginia	38	9	**24%**	**1%**	602	124	7,428	**8%**
Washington	499	94	**19%**	**9%**	2,960	548	34,238	**9%**
West Virginia	24	7	**29%**	**1%**	362	19	540	**67%**
Wisconsin	436	85	**19%**	**8%**	12,972	469	91,619	**14%**
Wyoming	5	1	**20%**	**0%**	0	6	17,138	**0%**
Unknown**	40	0	**-**	**0%**	-	-	-	**-**
	6,489	1,034	**16%**	**100%**	184,832	6949	2,343,922	**8%**

Table 1.10 summary, cont'd.

- **Based on an evaluation of OFRF's survey population data, as well as a comparison with USDA Economic Research Service figures, it is estimated that OFRF survey responses represent approximately 16% of all U.S. certified organic farmers for the year 2001, and approximately 8% of the certified organic acres in production that year.**

*Source: Greene, Catherine and Amy Kremen. U.S. Organic Farming in 2000-2001: Adoption of Certified Systems. USDA Economic Research Service Agricultural Information Bulletin Number 780. February 2003.

**Surveys were sent directly to a certifier for distribution to farmers certified by their agency; state locations unknown.

In what county is the largest value of your agricultural products produced?

(*Fill in response.*)

·Q11·

Information on counties has not been tabulated for presentation, but is available for survey data queries.

Organic Production and Product Details

·Q12· Did your farm produce organically grown herb, floriculture, ornamental or greenhouse products, mushrooms or honey in 2001? (*Select one response.*)

Table 2.1 summary

Percentage of respondents producing herb, floriculture and greenhouse products (and including mushrooms and honey).

- **33% of survey respondents produced organically grown herb, floriculture, ornamental or greenhouse products, mushrooms and/or honey in 2001.**

Table 2.1 Percentage of respondents producing organically grown herbs, floriculture products, etc. in 2001. (1,021 respondents.)

Response	f	%
Yes	332	**33%**
No	689	**67%**
Total	1,021	**100%**
Nonresponses = 13		

Which of the following products did you produce? *What kinds of final products were produced and sold from these crops?* (*Fill in acres or square feet, and identify form in which product was sold, by percentage.*)

·Q13·

Table 2.2a Organically grown herb, floriculture, ornamental, greenhouse or specialty crops, or mushrooms or honey products produced in 2001, and form in which they were sold or used, with production area reported as acres.

Crops produced (represented as acres)	No. of producers	No. of acres	Sold as fresh market product	Sold as value-added product	Sold to processor	Sold as seed or propagation stock	Used on farm
Herbs, cultivated culinary	90	1,064	49%	7%	4%	<1%	39%
Herbs, cultivated medicinal	29	95	5%	23%	69%	<1%	2%
Herbs, wildcrafted	18	613	32%	10%	34%	<1%	23%
Mushrooms	1	10	100%	0%	0%	0%	0%
Sprouts	1	0	100%	0%	0%	0%	0%
Vegetable starts	6	4	55%	0%	0%	2%	43%
Floriculture	42	30	70%	20%	0%	3%	7%
Ornamental annuals	13	8	75%	0%	0%	6%	19%
Christmas trees	9	42	93%	0%	0%	0%	7%
Honey	4	67	93%	0%	0%	0%	7%
Average of percent sold in each form			67%	6%	10%	2%	15%

Table 2.2b Organically grown herb, floriculture, ornamental, greenhouse or specialty crops, or mushrooms or honey products produced in 2001, and form in which they were sold or used, with production area reported as square feet.

Crops produced (represented as ft. sq.)	No. of producers	No. of square ft.	Sold as fresh market product	Sold as value-added product	Sold to processor	Sold as seed or propagation stock	Used on farm
Herbs, cultivated culinary	96	111,908	90%	3%	0%	2%	5%
Herbs, cultivated medicinal	23	14,284	3%	40%	25%	7%	25%
Herbs, wildcrafted	4	10,610	0%	0%	74%	20%	5%
Mushrooms	11	879,050	99%	0%	1%	0%	0%
Sprouts	6	1,792	78%	22%	0%	0%	0%
Vegetable starts	107	152,836	9%	1%	0%	9%	81%
Floriculture	42	65,525	85%	10%	0%	3%	2%
Ornamental annuals	22	24,325	62%	21%	0%	12%	5%
Honey	10	1,260	87%	5%	0%	0%	8%
Greenhouse lettuce	2	8,700	100%	0%	0%	0%	0%
Greenhouse raspberries	1	300	100%	0%	0%	0%	0%
Greenhouse spinach	1	817	100%	0%	0%	0%	0%
Greenhouse tomatoes	6	11,817	100%	0%	0%	0%	0%
Greenhouse vegetables	1	18,000	100%	0%	0%	0%	0%
Potted herbs	2	1,040	0%	0%	0%	75%	25%
Average of percent sold in each form			68%	7%	7%	9%	10%

Summary of Tables 2.2a and 2.2b

Herb, floriculture (etc.) products produced in 2001, and form in which they were sold: as fresh market or value-added product, to a processor, or as seed stock.

Respondents were provided the option of showing production area in acres or square feet, to represent different scales of production.

Table 2.2a represents production reported in acres.

Table 2.2b represents production reported in square feet.

- **67% and 68%, respectively, of product based on area of production (acres or square feet), were sold as fresh market product.**
- **6% and 7% of (respectively, as acres or square feet) were sold as value-added product.**
- **11% and 7% (respectively, as acres or square feet) or product was sold to a processor or for processing.**
- **2% and 9% (respectively, as acres or square feet) of product was sold as seed or propagation stock.**
- **15% and 10% (respectively, as acres or square feet) of product was used on farm; particularly vegetable starts.**

Note: "Sold as" percentages are weighted by acres or square feet of production area.

·Q14· Did your farm produce organically grown vegetable crops (including melons or sweet corn) in 2001? (*Select one response.*)

Table 2.3 summary

Percentage of respondents producing organically grown vegetables.

- **43% of respondents produced organically grown vegetables in 2001.**

Table 2.3 Percentage of respondents producing organic vegetables in 2001. (1,019 respondents.)

Response	f	%
Yes	442	43%
No	577	57%
Total	1,019	100%
Nonresponses = 15		

Which vegetable crops did you produce? *What kinds of final products were produced and sold from these crops?* (*Fill in acres and identify form in which product was sold by percentage.*)

·Q15·

Table 2.4 Organic vegetable crops produced in 2001, and form in which they were sold.

Vegetable crops	No. of producers	No. of acres	Sold as fresh market product	Sold as value-added product	Sold to processor	Sold as seed or propagation stock
Mixed vegetables	257	615	97%	1%	1%	1%
Asparagus	28	59	99%	1%	0%	0%
Beans, snap	41	264	34%	3%	62%	1%
Beets	27	42	100%	0%	0%	0%
Broccoli	34	713	99%	1%	0%	0%
Cabbage	8	40	77%	0%	23%	0%
Carrots	27	23	91%	0%	9%	0%
Cauliflower	14	164	100%	0%	0%	0%
Chard	13	33	100%	0%	0%	0%
Cucumbers	8	107	35%	0%	65%	0%
Edamame	4	72.7	3%	0%	96%	1%
Eggplant	1	2	100%	0%	0%	0%
Garlic	46	39	73%	11%	1%	15%
Kale	21	28	100%	0%	0%	0%
Leeks	1	0.9	100%	0%	0%	0%
Lettuces	49	740	94%	5%	0%	1%
Melons	28	87	100%	0%	0%	0%
Mixed salad or braising greens	36	309	31%	57%	12%	0%
Okra	2	0.9	56%	0%	0%	44%
Onions, bulbs	32	188	84%	0%	15%	1%
Peas	21	498	9%	0%	50%	41%
Peppers	26	52	98%	1%	0%	1%
Potatoes	78	358	53%	6%	40%	1%
Pumpkins	8	16.4	100%	0%	0%	0%
Radish	2	76	1%	0%	99%	0%
Rhubarb	2	1.25	100%	0%	0%	0%
Shallots	1	0.1	100%	0%	0%	0%
Spinach	22	1,043	82%	7%	11%	0%
Squash, summer	43	467	99%	0%	0%	1%
Squash, winter	61	616	98%	1%	0%	1%
Sweet corn	68	767	16%	1%	82%	1%
Tomatoes	79	340	28%	1%	70%	1%
Turnips, rutabagas	12	6	100%	0%	0%	0%
Average of percent sold in each form			74%	3%	19%	3%

Table 2.4 summary

Vegetable crops produced in 2001, and form in which they were sold: as fresh market or value-added product, to a processor, or as seed stock.

- **74% of respondents' vegetable crops were sold as fresh market crops.**
- **3% were sold as value-added product.**
- **19% were sold to a processor.**
- **3% were sold as seed or propagation stock.**
- **The greatest comparative volume of value-added products, based on acreage, were salad/braising greens and garlic.**
- **The greatest comparative volume of product sold to processors were radishes, edamame, sweet corn, tomatoes, cucumbers, snap beans, peas, potatoes and cabbage.**
- **The greatest comparative volume of product sold as seed or propagation stock were okra, peas, and garlic.**

Note: "Sold as" percentages are weighted by acres produced.

·Q16· Did your farm produce organically grown fruit, nut or tree crops for market in 2001? (*Select one response.*)

Table 2.5 summary

Percentage of respondents producing organically grown fruit, nut and/or tree crops.

- **36% of respondents produced organically grown fruit, nut and/or tree crops in 2001.**

Table 2.5 Percentage of respondents producing organic fruit,nut and/or tree crops in 2001. (1,019 respondents.)

Response	f	%
Yes	368	**36%**
No	651	**64%**
Total	1,019	**100%**
Nonresponses = 15		

Which fruit, nut or tree crops did you produce? *What kinds of final products were produced and sold from these crops?* (*Fill in acres and identify form in which product was sold by percentage.*)

·Q17·

Table 2.6 Organic fruit, nut and/or tree crops and products produced and form in which they were sold.

Fruit, nut or tree crops	No. of producers	No.of acres	Sold as fresh market product	Sold as value-added product	Sold to processor	Sold as seed or propagation stock
Almonds	5	164	76%	0%	24%	0%
Apples	100	1,229	72%	5%	23%	0%
Apricots	22	20	55%	5%	40%	0%
Avocados	13	66	94%	3%	2%	1%
Bananas	3	5	20%	80%	0%	0%
Blackberries	35	103	15%	5%	80%	0%
Blueberries	41	96	65%	0%	34%	1%
Cherimoya	1	0.1	100%	0%	0%	0%
Cherries	36	104	75%	1%	24%	0%
Chestnuts	2	3	100%	0%	0%	0%
Coffee	6	24	2%	83%	13%	2%
Cranberries	3	3.5	94%	5%	1%	0%
Currants	1	0.25	100%	0%	0%	0%
Dates	2	12	100%	0%	0%	0%
Figs	6	445	40%	0%	60%	0%
Filberts	1	80	50%	0%	50%	0%
Grapefruit	9	42	74%	0%	26%	0%
Grapes, raisin	4	165	0%	0%	100%	0%
Grapes, table	21	106	11%	14%	74%	1%
Grapes, wine	29	1,653	4%	57%	39%	0%
Guava	1	0.3	0%	0%	100%	0%
Huckleberries	1	14	100%	0%	0%	0%
Kiwi	11	117	81%	0%	19%	0%
Lemons, limes	6	3.8	87%	13%	0%	0%
Loquats	1	1	100%	0%	0%	0%
Macadamia nuts	2	20.5	2%	98%	0%	0%
Maple syrup	11	337	25%	70%	5%	0%
Noni	2	33	18%	82%	0%	0%
Oranges	17	259	99%	0%	1%	0%
Papaya	1	0.125	100%	0%	0%	0%
Peaches, Nectarines	42	97	94%	1%	5%	0%
Pears	53	302	62%	6%	32%	0%
Pecans	6	122	1%	1%	98%	0%
Persimmons	4	11	91%	0%	9%	0%
Pineapple	1	1	75%	25%	0%	0%
Pistachios	1	14	0%	100%	0%	0%
Plums	35	264	13%	52%	35%	0%
Pomegranate	1	0.2	0%	0%	100%	0%
Raspberries	55	36	64%	14%	22%	0%
Strawberries	62	443	92%	1%	7%	0%
Walnuts	23	646	8%	42%	50%	0%
Average of percent sold in each form			55%	19%	26%	0%

Table 2.6 summary

Fruit, nut and/or tree crops produced in 2001, and form in which they were sold: as fresh market or value-added product, to a processor or as seed stock.

- **55% of respondents' fruit, nut and/or tree crops were sold as fresh market crops.**
- **19% were sold as value-added product.**
- **26% were sold to a processor.**
- **0% were sold as seed or propagation stock.**

Note: "Sold as" percentages are weighted by acres produced.

·Q18· Did your farm produce organically grown grains, alfalfa or mixed hay, and/or other field crops for market in 2001? (*Select one response.*)

Table 2.7 summary

Percentage of respondents producing grains, alfalfa, mixed hay or other field crops in 2001.

- **45% of respondents produced organically grown grains, alfalfa, mixed hay and/or other field crops in 2001.**

Table 2.7 Percentage of respondents producing organic field crops and products in 2001. (1,015 respondents.)

Response	f	%
Yes	463	**45%**
No	552	**52%**
Total	1,015	**100%**
Nonresponses = 19		

Which grains, alfalfa or mixed hay, or other field crops did you produce? (*Fill in acres and identify form in which product was sold or used on farm, by percentage.*)

·Q19·

Table 2.8 Grain, alfalfa or mixed hay, or other field crop products produced, and the form in which they were sold or used.

Crops produced	No. of producers	No.of acres	Sold as commodity product	Sold as value-added product	Sold to processor	Sold as seed or propagation stock	Used on-farm
Amaranth	1	600	0%	100%	0%	0%	0%
Barley	44	2,330	53%	1%	22%	1%	23%
Beans, dry	18	1,700	39%	21%	38%	1%	1%
Buckwheat	18	867	25%	0%	42%	8%	25%
Clover/vetch	38	1,069	9%	0%	0%	5%	86%
Corn, livestock	128	7,707	58%	1%	6%	1%	34%
Corn, food	26	1,503	46%	0%	50%	1%	3%
Cotton	4	2,453	93%	7%	0%	0%	0%
Hay, alfalfa	138	15,169	46%	7%	1%	1%	45%
Hay, other/mixed	161	10,394	24%	1%	0%	1%	74%
Flax	9	1,372	20%	1%	74%	2%	3%
Lentils	4	260	12%	0%	88%	0%	0%
Millet	14	2,288	15%	1%	71%	7%	6%
Oats	80	2,894	28%	4%	16%	8%	44%
Peanuts	1	800	100%	0%	0%	0%	0%
Peas, dry	9	642	30%	0%	12%	27%	31%
Popcorn	7	104	71%	14%	14%	0%	1%
Rice	8	3,588	15%	75%	10%	0%	0%
Rye	18	297	13%	0%	0%	20%	67%
Soybeans, livestock	74	5,053	66%	3%	17%	1%	13%
Soybeans, food	107	7,248	41%	1%	56%	0%	2%
Sorghum	4	15	0%	47%	6%	47%	0%
Spelt	24	1,262	35%	0%	0%	12%	53%
Sunflower	11	747	1%	0%	90%	9%	0%
Tobacco	4	6	33%	0%	67%	0%	0%
Wheat	94	15,092	38%	1%	58%	1%	2%
Durum	2	270	100%	0%	0%	0%	0%
Forage rape	1	0.75	0%	0%	0%	100%	0%
Milo Bean	1	10	0%	0%	0%	100%	0%
Quinoa	1	25	100%	0%	0%	0%	0%
Seed corn	1	65	0%	0%	100%	0%	0%
Silage	1	25	0%	0%	0%	100%	0%
Triticale	4	168	67%	0%	0%	21%	12%
Average of percent sold in each form			36%	9%	25%	14%	16%

Table 2.8 summary

Grain, alfalfa, mixed hay or other field crops produced in 2001, and form in which they were sold or used: as commodity or value-added product, to processor or as seed stock; or used on farm.

- **36% of respondents' grain, alfalfa, mixed hay or other field crops were sold as commodity products.**
- **9% were sold as value-added product.**
- **25% were sold to a processor.**
- **14% were sold as seed or propagation stock.**
- **16% were used on farm.**

N*ote*: "Sold as" and "used on farm" percentages are weighted by acres produced.

·Q20· Did your farm produce organically grown livestock products for market in 2001?

(Select one response.)

Table 2.9 summary

Percentage of respondents producing organically grown livestock products in 2001.

- **20% of respondents produced organic livestock products in 2001.**

Table 2.9 Percentage of respondents producing organic livestock products in 2001. (1,012 respondents.)

Response	f	%
Yes	203	20%
No	809	80%
Total	1,012	100%
Nonresponses = 22		

·Q21· Which livestock products did you produce? *What kinds of final products were produced and sold from your livestock?*

Table 2.10 summary

Livestock products produced in 2001, and form in which they were sold: as commodity or value-added product, to processor or as breeding stock.

- **24% of respondents' livestock products were sold as commodity products.**
- **32% were sold as value-added product.**
- **22% were sold to a processor.**
- **23% were sold as breeding stock.**

Note: "Sold as" percentages are weighted by number of units produced.

Table 2.10 Organic livestock products produced in 2001 and the form in which they were sold.

Livestock	Units of production	No. of producers	Total No. of units produced	Sold as commodity product	Sold as value-added product	Sold to processor	Sold as breeding stock
Beef cattle	# of animals	45	1,265	34%	45%	19%	2%
Hogs/pigs	# of animals	16	445	16%	52%	24%	8%
Sheep	# of animals	18	574	78%	20%	1%	1%
Rabbits	# of animals	2	127	61%	39%	0%	0%
Chickens	# of birds	33	51,997	4%	95%	1%	0%
Turkeys	# of birds	11	1,775	4%	96%	0%	0%
Chickens, layer hens	# of dozen eggs	67	1,974,190	3%	15%	82%	0%
Dairy cows	annual cwt	54	981,452	58%	1%	36%	5%
Dairy goats	annual lbs	5	47,050	0%	100%	0%	0%
Sheep: wool	annual lbs	5	2,065	92%	8%	0%	0%
Dairy Bull	# of animals	1	1	0%	0%	100%	0%
Dairy Heifer	# of animals	1	6	0%	0%	0%	100%
Elk	# of animals	1	11	0%	27%	0%	73%
Goat fiber	# of animals	1	10	50%	0%	0%	50%
Llama	annual lbs	1	10	50%	0%	50%	0%
Llama fiber	annual lbs	1	5	0%	100%	0%	0%
Goat kids	# of animals	1	10	0%	0%	0%	100%
Bull calves	# of animals	1	6	0%	0%	100%	0%
Buffalo	# of animals	1	64	0%	9%	0%	91%
Average of percent sold in each form				24%	32%	22%	23%

Were any value-added products (packaged and/or processed products) made from your organically grown products in 2001, either by or for your farm prior to sale, or by another processor after you've sold them your raw farm product(s)?
(*Select one response.*)

·Q22·

Table 2.11 Percentage of respondents producing products that were made into value-added product; either on-farm or by another processor. (1,005 respondents.)

Response	f	%
Yes	397	**40%**
No	608	**60%**
Total	1,005	**100%**
Nonresponses = 29		

Table 2.11 summary

Percentage of respondents producing organic value-added products.

- **40% of respondents produced products that were eventually value-added on-farm or by another processor.**

·Q23· What kinds of value-added products (processed and/or packaged) were made from your organically grown products in 2001, and who were they processed by?

(Select all that apply.)

Table 2.12 Value-added products produced from organically grown products; and where processed. More than one response per respondent is possible.

Response category	Processed by or for your farm — No. of responses	Processed by another processor — No. of responses
From herbs, floriculture, ornamental & greenhouse products		
Bouquets	33	1
Canned or bottled products	5	2
Cosmetic or body care products	20	10
Dried products	47	3
Herbal supplements	10	18
Herb planters; hanging baskets	1	0
Herbal tinctures	17	17
Herbal teas	21	10
Herbal vinegar	4	0
Mushroom kits	1	0
Wreaths, braids, ornamental Items	40	0
Totals processed from herb products etc.	**199**	**61**
From vegetable products		
Canned or bottled products	26	12
Dried products	17	1
Frozen products	8	8
Salad mixes	51	4
Totals processed from vegetable products	**51**	**21**
From fruit, nut, tree products		
Baby food	0	2
Baked goods	3	0
Dried products	19	12
Frozen products	7	3
Juices, cider	21	26
Nut or fruit butters	8	6
Preserves	28	5
Roasted coffee	1	1
Wine	17	15
Other canned or bottled products	12	9
Totals processed from fruit, nut & tree products	**116**	**79**

Response category	Processed by or for your farm — No. of responses	Processedby another processor — No. of responses
From grains, field crop products		
Breads and/or other baked goods	5	12
Cotton lint; cotton products	1	3
Flash-frozen edamame	1	0
Flours, milled products, meals	7	38
Food supplements/pharmaceuticals	1	1
Grain flakes, cereals	1	11
Grains, cleaned, dried and/or bagged	16	42
Livestock feed rations	7	31
Oils	0	8
Pastas	1	3
Rice milk and syrup	1	0
Roasted soybeans	1	0
Snack chips	2	8
Soymilk	0	4
Soybean sprouts	0	1
Tofu, tempeh	1	6
Totals processed from grains, field crop products	**45**	**168**
From livestock products		
Butter	3	23
Cheese	5	31
Eggnog	0	1
Ice cream	0	5
Meats, cured	6	6
Meats, fresh or frozen cuts	23	18
Quark	1	0
Soap	1	0
Wool products	1	0
Yogurt	1	18
Totals processed from animal products	**41**	**102**

What percentage of your farm's gross sales were derived from value-added products that were processed by or for your farm? (*Select one response.*)

·Q24·

Table. 2.13 Percentage of gross sales derived from organic value-added products. (747 respondents.)

Response Category	f	%
None	441	**59%**
1% - 25%	155	**21%**
26% - 50%	40	**5%**
51% - 75%	30	**4%**
76% - 100%	81	**11%**
Total	747	**100%**
Nonresponses = 287		

Table 2.13 summary

Percentage of respondents' gross sales derived from value-added products.

- **15% of respondents derived more than 50% of their farm's gross sales from value-added products.**

Marketing Your Organic Products

·Q25· Where did you sell your organic products in 2001?

From the following categories, indicate what percentages of your organic product volume were delivered to the following marketing channels.

Table 3.1a summary

Market channels where respondents sold organic vegetable, herb, floriculture, mushroom & honey products.

- **80% of respondents (f=353) who produced vegetable, herb, floriculture, mushroom and/or honey products sold them through *consumer-direct channels*; the estimated volume based on acres produced was about 13%.**
- **54% of respondents (f=237) sold these products through direct-to-*retail channels*; the estimated volume sold through these channels based on acres produced was 53%.**
- **69% of respondents (f=301) sold these products through *wholesale market channels*; the estimated volume sold through these channels based on acres produced was 34%.**

Note: "Total acres" figures in the third column are derived from responses to Question 4, where respondents identified the number of of acres grown in each production category. "Estimated volume" figures in the fourth column are based on the number of acres in production, providing a weighted volume estimate based on total production area.

Table 3.1a Market channels where respondents sold their organic vegetable, herb, floriculture, mushroom & honey products in 2001. (439 respondents.)

Market channels	No. of responses	Total acres	Est. volume based on acres produced
Consumer-direct (353 respondents)			
Direct on-farm	154	217	**2.48%**
Farmers markets	191	488	**5.57%**
CSA or subscription	88	397	**4.53%**
Mail order	26	10	**0.11%**
Farmers	2	10	**0.11%**
Festivals/fairs	7	5	**0.06%**
Food bank	2	2	**0.02%**
Friends	1	0	**0.00%**
Website	2	1	**0.01%**
Subtotal	473	**1,130**	**12.89%**
Direct-to-retail (237 respondents)			
Natural food stores	152	1,379	**15.73%**
Conventional supermarkets	43	3,077	**35.11%**
Restaurants	97	202	**2.30%**
Nurseries	14	7	**0.08%**
Specialty shops	2	1	**0.01%**
Pet shops	1	1	**0.01%**
Subtotal	309	**4,666**	**53.23%**
Other wholesale markets (301 respondents)			
Natural food store chain buyer	28	440	**5.02%**
Conv. supermarket chain buyer	8	413	**4.71%**
Private grain elevator	0	0	**0.00%**
Processor, mill or packer	22	640	**7.30%**
Seed company	7	6	**0.07%**
Livestock feed company	2	1	**0.01%**
Distributor or handler	38	1,186	**13.53%**
Through a grower cooperative	23	50	**0.57%**
Through an independent broker	13	225	**2.57%**
Institutional food service	6	5	**0.06%**
Auction	2	3	**0.03%**
Subtotal	149	2,969	**33.87%**
Totals	931	**8,765**	**100%**

Table 3.1b Market channels where respondents sold their organic fruit, nut and tree products in 2001. (303 respondents.)

Market channels	No. of responses	Total acres	Est. volume based on acres produced
Consumer-direct (176 respondents)			
Direct on-farm	92	299	**4.74%**
Farmers markets	82	248	**3.93%**
CSA or subscription	24	62	**0.98%**
Mail order	16	23	**0.36%**
Farmers	2	12	**0.19%**
Friends	1	15	**0.24%**
Website	2	13	**0.21%**
Food Bank	1	0	**0.00%**
Subtotal	220	672	**10.65%**
Direct-to-retail (116 respondents)			
Natural food stores	87	626	**9.92%**
Conventional supermarkets	15	92	**1.46%**
Restaurants	20	51	**0.81%**
Nurseries	0	0	**0.00%**
Specialty shops	2	1	**0.02%**
Other farm retail outlets	1	1	**0.02%**
Subtotal	125	771	**12.21%**
Other wholesale markets (153 respondents)			
Natural food store chain buyer	20	453	**7.18%**
Conv. supermarket chain buyer	4	63	**1.00%**
Private grain elevator	1	0	**0.00%**
Processor, mill or packer	58	1,800	**28.52%**
Seed company	0	0	**0.00%**
Livestock feed company	1	1	**0.02%**
Distributor or handler	39	1,732	**27.44%**
Through a grower cooperative	15	126	**2.00%**
Through an independent broker	24	694	**10.99%**
Subtotal	162	4,869	**77.14%**
Totals	507	**6,312**	**100%**

Table 3.1b summary

Market channels where respondents sold organic fruit, nut and tree products.

- **58% of respondents (f=176) producing organic fruit, nut and tree products sold them through *consumer-direct channels*; the estimated volume based on acres produced was about 11%.**
- **38% of respondents (f=116) sold through *direct-to-retail channels*; the estimated volume based on acres produced was about 12%.**
- **50% of respondents (f=153) sold through *wholesale market channels*; the estimated volume based on acres produced was about 77%.**

Note: "Total acres" figures in the third column are derived from responses to Question 4, where respondents identified the number of of acres grown in each production category. "Estimated volume" figures in the fourth column are based on the number of acres in production, providing a weighted volume estimate based on total production area.

Table 3.1c summary
Market channels where respondents sold organic grain and field crop products.

- **28% of respondents (f=83) producing organic grain & field crop products sold them through *consumer-direct channels*; the estimated volume based on acres produced was about 11%.**
- **7% of respondents (f=20) sold these products through *direct-to-retail channels*; the estimated volume based on acres produced was about 1%.**
- **82% of respondents (f=246) sold these products through *wholesale market channels*; the estimated volume based on acres produced was about 82%.**

Note: "Total acres" figures in the third column are derived from responses to Question 4, where respondents identified the number of of acres grown in each production category. "Estimated volume" figures in the fourth column are based on the number of acres in production, providing a weighted volume estimate based on total production area.

Table 3.1c Market channels where respondents sold their organic grain & field crop products in 2001. (299 respondents.)

Market channels	No. of responses	Total acres	Est. volume based on acres produced
Consumer-direct (83 respondents)			
Direct on-farm	47	4,286	**6.55%**
Farmers markets	6	43	**0.07%**
CSA or subscription	6	259	**0.40%**
Mail order	3	47	**0.07%**
Farmers	28	2,360	**3.61%**
Subtotal	90	6,995	**10.69%**
Direct-to-retail (20 respondents)			
Natural food stores	10	234	**0.36%**
Conventional supermarkets	4	344	**0.53%**
Restaurants	5	38	**0.06%**
Nurseries	0	0	**0.00%**
Specialty shops	3	99	**0.15%**
Subtotal	22	715	**1.09%**
Other wholesale markets (246 respondents)			
Natural food store chain buyer	2	623	**0.95%**
Conv. supermarket chain buyer	1	600	**0.92%**
Private grain elevator	71	10,611	**16.22%**
Processor, mill or packer	89	24,362	**37.24%**
Seed company	9	443	**0.68%**
Livestock feed company	16	2,176	**3.33%**
Distributor or handler	29	4,976	**7.61%**
Through a grower cooperative	23	7,857	**12.01%**
Through an independent broker	32	6,065	**9.27%**
Subtotal	272	57,713	**88.22%**
Totals	384	65,423	**100.00%**

Table 3.1d Market channels where respondents sold their organic livestock products in 2001. (201 respondents.)

Market channels	No. of responses	Total acres	Est. volume based on acres produced
Consumer-direct (109 respondents)			
Direct on-farm	60	1,455	**14.53%**
Farmers markets	29	326	**3.26%**
CSA or subscription	14	271	**2.71%**
Mail order	5	454	**4.53%**
Festivals/fairs	1	0	**0.00%**
Farmers	1	50	**0.50%**
Subtotal	110	2,556	**25.52%**
Direct-to-retail (50 respondents)			
Natural food stores	31	1,095	**10.93%**
Conventional supermarkets	7	42	**0.42%**
Restaurants	7	86	**0.86%**
Nurseries	0	0	**0.00%**
Subtotal	45	1,223	**12.21%**
Other wholesale markets (100 respondents)			
Natural food store chain buyer	3	0	**0.00%**
Conv. supermarket chain buyer	2	2	**0.02%**
Private grain elevator	2	92	**0.92%**
Processor, mill or packer	25	1,993	**19.90%**
Seed company	1	0	**0.00%**
Livestock feed company	1	0	**0.00%**
Distributor or handler	18	1,246	**12.44%**
Through a grower cooperative	39	2,594	**25.90%**
Through an independent broker	5	168	**1.68%**
Auction	2	141	**1.41%**
Subtotal	98	**6,236**	**62.27%**
Total	253	**10,015**	**100%**

Table 3.1d summary

Market channels where respondents sold organic livestock products.

- **54% of respondents (f=109) producing organic livestock products sold them through *consumer-direct channels*; the estimated volume based on acres produced was about 26%.**
- **25% of respondents (f=50) sold these products through *direct-to-retail channels*; the estimated volume based on acres produced was about 12%.**
- **50% of respondents (f=100) sold these products through *wholesale market channels*; the estimated volume based on acres produced was about 62%.**

Note: "Total acres" figures in the third column are derived from responses to Question 4, where respondents identified the number of of acres grown in each production category. "Estimated volume" figures in the fourth column are based on the number of acres in production, providing a weighted volume estimate based on total production area.

·Q26·

Where were your organic farm product buyers located in 2001? *From the following categories, indicate what percentages of your volume were delivered to buyers in the following locations relative to your primary farm location.*

Table 3.2 summary

Buyer location of organic farm products, in relation to primary farm location (distance from farm).

- **Respondents predominantly sold vegetable products *locally*; 79% of vegetable products were sold *within*100 *miles of the farm*.**
- **Organic livestock products tended to be sold further from the farm, with 47% sold *more than* 500 *miles from the farm*.**

N*ote*: "Estimated volume" figures are based on the number of acres in production as identified by respondents in Question 4, providing a weighted volume estimate based on total production area.

Table 3.2 Buyer locations of organic farm products, in relation to primary farm location, 2001. (958 respondents.)

Buyer location/where sold	Vegetable, herb, floriculture, mushroom & honey products (f=439)		Fruit, nut and tree products (f=295)		Grain and field crop products (f=301)		Livestock products (f=188)	
	No. of responses	Est. volume based on acres produced	No. of responses	Est. volume based on acres produced	No. of responses	Est. volume based on acres produced	No. of responses	Est. volume based on acres produced
Locally: <=100 miles from primary farm location	408	**79%**	223	**43%**	172	**33%**	114	**26%**
Regionally: >100 miles, <500 miles from farm	104	**5%**	80	**19%**	133	**35%**	50	**27%**
Outside of region: >=500 miles from farm	58	**15%**	66	**32%**	48	**25%**	14	**47%**
Exported outside of U.S.*	10	**1%**	23	**6%**	16	**7%**	1	**0%**
Totals		**100%**		**100%**		**100%**		**100%**

Vegetable, herb, etc. products weighted percentages are based on 27,694 acres of product.

Fruit, nut and tree product weighted percentages are based on 6,255 acres of product.

Grain and field crop product weighted percentages are based on 79,637 acres of product.

Livestock product weighted percentages are based on 29,418 acres of livestock production area.

* 29 respondents identified countries where organic product was exported: Australia (f=2); Canada (f=8); England/UK (f=6); Europe (f=2); France (f=1); Italy (f=1); Japan (f=13): Korea (f=1); Switzerland (f=1); Tahiti (f=1); Taiwan (f=3).

For your 2001 sales, at what point did you determine prices for your organic products? *On the "spot" market, or under production or marketing contracts? From the following categories, indicate what percentages of your volume were sold under each of the contract conditions described.*

·Q27·

Table 3.3 summary

Timing of price determination for organic products.

- **86% of vegetable product produced was delivered on the *spot market* with no forward contract, while 14% of product was sold under forward contracts;**
- **39% of fruit/nut/tree product was sold under forward contracts.**
- **62% of grain and field crop product was sold under forward contracts;**
- **20% of livestock product was sold under forward contracts.**

Note: "Estimated volume" figures are based on the number of acres in production as identified by respondents in Question 4, providing a weighted volume estimate based on total production area.

Table 3.3 Timing of price determination for organic products. (902 respondents.)

	Vegetable, herb, floriculture, mushrooms & honey products (f=419)		Fruit, nut and tree products (f=277)		Grain and field crop products (f=305)		Livestock products (f=159)	
Time of price determination	**No. of responses**	**Est. volume based on acres produced**	**No. of responses**	**Est. volume based on acres produced**	**No. of responses**	**Est. volume based on acres produced**	**No. of responses**	**Est. volume based on acres produced**
Spot market, no contract: price determined at time of sale/delivery	352	**86%**	208	**61%**	160	**38%**	81	**80%**
Short-term forward contracts (weeks): a few weeks or months prior to delivery	48	**2%**	29	**9%**	67	**24%**	14	**8%**
Short-term forward contract (season/year): at beginning of growing season or one year ahead of delivery	67	**11%**	23	**14%**	111	**33%**	28	**7%**
Long-term forward contract: more than one year or several years ahead	7	**1%**	13	**16%**	14	**5%**	25	**5%**
Total		**100%**		**100%**		**100%**		**100%**

Vegetable, herb, etc. product weighted percentages are based on 27,789 acres of production.

Fruit, nut and tree product weighted percentages are based on 6,348 acres of production.

Grain and field crop products weighted percentages are based on 79,495 acres of production.

Livestock product weighted percentages are based on 32,589 acres of production.

·Q28· What plans, if any, do you have to increase or decrease the volume of organic product sold through the following marketing channels, and to the following product buyer locations? (*Select one response for each category.*)

Table 3.4 summary

Plans to increase or decrease organic product sold via various marketing channels and buyer locations.

- **The greatest percentage of respondents indicated that they plan market channel increases in *direct-to-consumer* and *direct-to-retail markets*, followed by *local* and *regional markets*.**

Table 3.4 Respondents' plans to increase or decrease the volume of organic product sold via various marketing channels and buyer locations.

Marketing channel	Plan to increase	Plan to stay the same	Plan to decrease	f
Direct-to-consumer sales	**51%**	**45%**	**4%**	681
Direct-to-retail buyer sales (restaurants, individual stores, etc.)	**47%**	**47%**	**6%**	536
Sales through grower or marketing cooperative(s)	**34%**	**60%**	**6%**	429
Other wholesale market sales	**33%**	**61%**	**6%**	453
Local sales (100 miles or less from primary farm location)	**45%**	**52%**	**2%**	702
Regional sales (>100 miles but less than 500 miles)	**40%**	**55%**	**5%**	492
National sales or outside of region	**34%**	**60%**	**6%**	354
Export sales	**23%**	**69%**	**7%**	278

·Q29· What plans, if any, do you have to increase or decrease your volume of organic product in the following categories? (*Select one response for each category.*)

Table 3.5 summary

Plans to increase or decrease volume of production in various production and market categories.

- **Respondents indicated the most interest in expanding the *volume of organic products* produced and marketed, followed by an interest in expanding the *number organic acres* that they have in production.**

Table 3.5 Respondents' plans to increase or decrease volume of organic product in various production and market categories.

Response categories	Plan to increase	Plan to stay the same	Plan to decrease	f
Volume of organic products produced	**58%**	**37%**	**5%**	929
Number of acres in organic production	**50%**	**56%**	**5%**	673
Number of animals in organic production	**42%**	**62%**	**4%**	673
Number of products marketed	**39%**	**52%**	**6%**	874
Number of market outlets/buyers	**36%**	**47%**	**3%**	563
Number of value-added products	**34%**	**61%**	**3%**	516

What marketing aids do you use to sell your products? (*Select all that apply.*)

·Q30·

Table 3.6. Marketing aids used by respondents. (916 respondents; more than one response per respondent is possible.)

Marketing aids used by respondents	No. of responses	% of respondents using
Word-of-mouth	688	**75%**
Organic certification label/seal on product(s)	436	**48%**
Telephone banking: calls to potential buyers	279	**31%**
Media interviews about your farm, farm products or about organic farming	216	**24%**
Product or farm advertising	186	**20%**
Branded products, such as farm or product logos	183	**20%**
Farm events, demonstrations	180	**20%**
Product samples	166	**18%**
Recipes, cooking tips, cookbooks	151	**17%**
Educational materials about farm/farm products	147	**16%**
Your own farm product website	138	**15%**
Educational materials about organic farming	115	**13%**
Links to or sales on websites other than your own	105	**12%**
Farm product catalogue (printed)	99	**11%**
Additional label claims, such as "dry-farmed," "tree-ripened," etc.	78	**8%**
"GMO-free" labeling	50	**5%**

Other responses included: business cards, certifier's publications, CSA flyer, conferences, direct mail to customers, organic farm directories, email distribution lists, farm brochure/flyer, marketing cooperatives, farm signs, quality, reputation, trade shows, in-store information sheets, club presentations, newspaper articles, customer mailings.

Table 3.6 summary

Marketing aids used by respondents to sell organic products

- **Respondents indicated most frequently using *word-of-mouth* (with 75% of respondents using this method); and *organic certification label* (48% of respondents using) and *telephone banking* to potential buyers (31%) as marketing aids.**
- ***"GMO-Free" labeling* and *additional label claims* were identified the least frequently as marketing aids used by respondents.**

Organic Market Conditions, 2001

How was your season last year? *How were production and market conditions for your organic farm operation in general?* (*Select one response per category.*)

·Q31·

Table 4.1 Respondents' ratings of organic production & market conditions in 2001. (992 respondents.)

Conditions	Excellent (few problems)	Good	Fair	Poor (severe problems)	f
Crop or product quality	31%	50%	15%	4%	961
Market demand	27%	45%	22%	6%	963
Pest or disease problems	24%	41%	26%	9%	959
Prices	18%	49%	25%	8%	957
Weeds	13%	39%	37%	11%	948
Yields	12%	43%	30%	15%	971
Weather	11%	41%	27%	21%	992

Table 4.1 summary

Respondents' ratings of organic production and market conditions in 2001. (How was your 2001 season?)

- From the range of response choices provided, respondents indicated that they had the fewest problems with *crop or product quality* as a production or market concern. Crop or product quality conditions for 81% of respondents were good to excellent.
- Respondents identified *weather* most frequently as a production or market problem. 48% of respondents identified weather conditions as being fair or poor.

This year, did the market for your organic farm product(s) expand, contract or hold steady compared to recent years? (*Select one response.*)

·Q32·

Table 4.2 Rate of organic market expansion or contraction identified by respondents, for the year 2001. (974 respondents.)

Rate of organic market expansion or contraction	f	%
Expanded 20% or more	183	19%
Expanded 10% to 19%	145	15%
Expanded 5% to 9%	102	10%
Held steady	322	33%
Market was mixed, varied among products	84	9%
Contracted 5% to 9%	29	3%
Contracted 10% to 19%	17	3%
Contracted 20% or more	33	3%
Nonresponses = 60		
Other responses included: first year or two marketing organic product--limited data for comparison; weather-related problems; difficulties with specific buyers or markets.		

Table 4.2 summary

Rate of organic market expansion or contraction in 2001, compared to recent years.

- 44% of respondents reported organic market expansion rates of greater than 5% for the year.
- 19% of respondents reported an organic market expansion rate of of 20% or more.
- The organic market held steady for 33% of respondents.
- The organic market contracted for 6% of respondents.

·Q33· Please feel free to tell us more about recent trends in your organic markets.

Examples: if markets for your organic products changed significantly, if markets expanded for some products and contracted for others, or varied in different market channels. (Open-ended response structure.)

Figure 4.1—Organic market trends in 2001, as summarized from write-in responses. (498 respondents, 655 responses tabulated.)

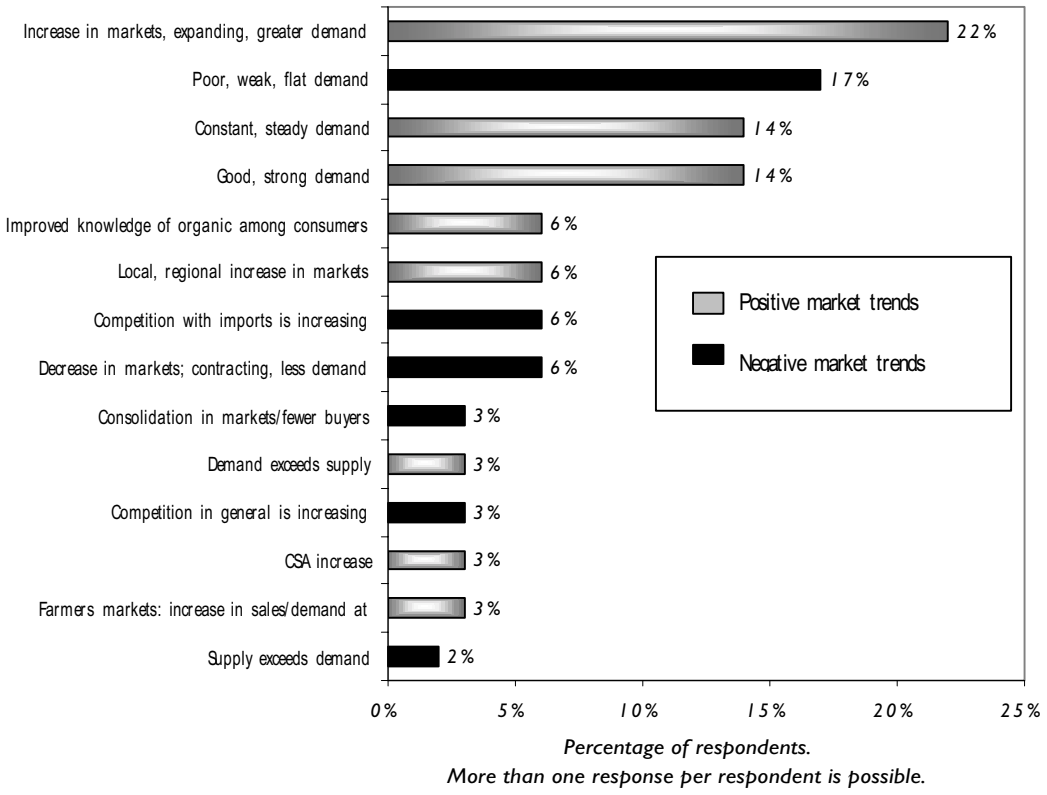


Figure 4.1 summary

Organic market trends; write-in responses.

- **The greatest percentage of respondents, more than one fifth, (22%, f=110) wrote comments that indicated their markets are *increasing, expanding* or they are experiencing *greater demand* for organic products.**
- **17% (f=85) wrote comments indicating that their markets were *poor, weak or flat*.**
- **The figure identifies additional positive and negative market trends, as summarized from respondent comments. Comments are differentiated by color based on "positive" trends (grey), or "negative" trends (black).**

Note: All responses to this question, arranged by state, may be viewed on OFRF's website at www.ofrf.org (see link provided with Table 4.3).

Table 4.3 Organic market trends in 2001, selected comments. *Note*: Comments from all 498 respondents are available, organized by state, on OFRF's website, at: *www.ofrf.org/publications/survey/4thNOFS/Q33comments.pdf*

State	Acres organic	Comments: Trends in organic markets (and farm products produced)
CA	24	*Opened 5 days/week versus weekends only last year. Sales more than doubled.* (Farm produces: Fruit, Nuts)
CA	45	*I am selling to one dairy and it's hard to bargain for the "upper" dollar.* (Farm produces: Grains, Field crops)
CT	1	*Demand appears to be quite high for all organic products.* (Farm produces: Herbs./Vegetables)
IA	230	*The tofu soybean market seemed tighter.* (Farm produces: Grains, Field crops)
KS	94	*This is the first year of certified organic product and I can't seem to sell it. I'm having trouble.* (Farm produces: Vegetables/Grains, Field crops)
ME	2	*If we could grow more, we could sell more. Rising demand through increased customer base.* (Farm produces: Herbs./Vegetables/Value-added products)
MT	3,100	*Growing regional and overseas markets.* (Farm produces: Grains, Field crops)
ND	1,100	*I was able to sell all my product and could have sold more if I had it.* (Farm produces: Vegetables/Fruit,Nuts/Grains, Field crops/Value-added products)
NM	50	*The demand for the highest quality chicken, eggs and other meats has increased dramatically.* (Farm produces: Grains, Field crops/Livestock/Value-added products)
NY	180	*Our local community gained many dairy farms which really boosted the selling of hay and grain crops.* (Farm produces: Grains, Field Crops
PA	2	*More local competition for same market.* (Farm produces: Herbs/Vegetables/Livestock)
WA	17	*Apple prices of all categories down dramatically.* (Farm produces: Fruit, Nuts)

This past year, did average prices for your organic farm products go up, down or hold steady compared to recent years? (*Select one response.*)

·Q34·

Table 4.4 Trends in average prices for organic farm products in 2001. (992 respondents.)

Response categories: Price trends for organic products	f	%
Went up 20% or more	27	3%
Went up 10% to 19%	61	6%
Went up 5% to 9%	167	17%
Held steady	512	52%
Went down 5% to 9%	67	7%
Went down 10% to 19%	41	4%
Went down 20% or more	42	4%
Prices were mixed	42	4%
Other	33	3%
Nonresponses = 40		

Table 4.4 summary

Trends in average prices for organic farm products in 2001.

- **26% of respondents indicated that their prices went up in 2001.**
- **15% indicated that their prices went down.**
- **The largest number of respondents, 52%, indicated that their prices held steady for the year.**
- **The second largest set of respondents, 17%, indicated that prices went up between 5% and 9% that year.**

·Q35·

Please tell us about what trends have been occurring regarding prices for your organic products. *Examples: If prices for your organic products changed significantly, if they went up for some products and down for others; if price trends varied in different market channels, etc. (Open-ended, write-in response.)*

Figure 4.2—Organic price trends, as summarized from write-in responses. (438 respondents. 609 responses tabulated.)

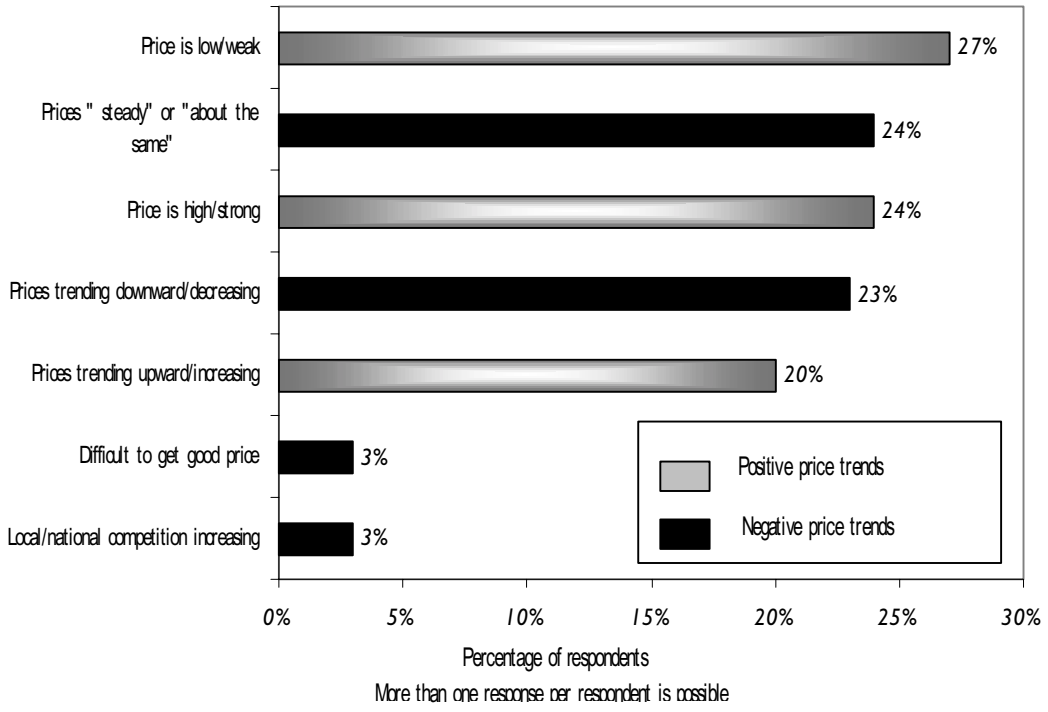


Figure 4.2 summary

Organic price trends summary, from write-in responses.

- **27% commented that the price for their products was low/weak.**
- **24% of respondents' comments indicated that prices for their organic products have been steady.**
- **24% commented that prices trends were high/strong.**

Table 4.5 Organic price trends, selected comments. Note: Comments from all 437respondents are available, organized by state, on OFRF's website: at *www.ofrf.org/publications/survey/4thNOFS/Q35pricetrendcomments.pdf.*

State	Acres organic	Comments (and items produced by farm)
CA	7.5	*Our prices held because we held them; people using brokers or wholesale saw them go down. No advantage to organic for small farmer anymore. Organic fees too high and no price premium.* (Farm produces: Vegetables/Fruit, Nuts/Value-added)
CA	5	*Prices are stable or slightly dropping.* (Farm produces: Fruit, Nuts)
IL	139	*Over the past several years the prices for row crops and cereal grains have lowered an average of 25% .*(Farm produces: Herbs/Grains, Field crops)
KS	400	*Organic food bean prices down. Downward pressure on feed corn but we have mostly held prices about same as last year. Wheat prices steady to a little stronger.* (Farm produces: Grains, Field crops/Livestock)
LA	8	*Far exceeding conventional citrus pricing.* (Farm produces: Fruit, Nuts/Livestock/Value-added)
MD	130	*Increased competition from larger certified farms especially California.* (Farm produces: Herbs/Vegetables)
MI	650	*The corn market has increased while the price remains the same. Spelt price and market is steady. Soybean price has declined while market has increased.* (Farm produces: Vegetables/Grains, Field Crops)
MO	115	*The organic soybeans were more difficult to sell to the elevators.* (Farm produces: Grains, Field crops)
OR	27	*We increased our prices for the first time in 4 years. Was well accepted and saw no decrease in sale. Mainly with finished product of bulk herbs.* (Farm produces: Herbs/Value-added)
TX	20	*Prices for organic products are decreasing.* (Farm produces: Vegetables)
VT	45	*Wholesale and retail prices held low by competition from Canada.* (Farm produces: Fruit, Nuts/Grains, Field crops/Value-added)
WA	8	*Downward pressure across the board.* (Farm produces: Vegetables/Fruit, Nuts)
WI	124	*Prices strong because of high demand.* (Farm produces: Grains, Field crops)

What volume percentage of your organically grown product(s) were you able to sell at an organic price premium in 2001? *For example, at some price greater than that of the same or similar conventionally-grown product? (Select one response.)*

·Q36·

Table 4.6 Percentage of organic products sold at organic price premiums in 2001. (996 respondents.)

Percentage of product sold at organic premiums	f	%
100% of product sold	409	**41%**
76-99% of product sold	195	**19%**
51-75% of product sold	107	**11%**
26-50% of product sold	78	**7%**
1%-25% of product sold	65	**8%**
0% of product sold	80	**8%**
Don't know	62	**6%**
Nonresponses = 38		

Table 4.6 summary

Percentage of organic products sold at organic price premiums in 2001.

- **41% of respondents said they are able to obtain organic price premiums on 100% of their organically grown products.**
- **86% of respondents indicated that they received a premium price for some portion of their organically grown products.**
- **8% of respondents were unable to obtain an organic price premium on any of their organically grown products.**

·Q37· What circumstances, if any, have made it difficult to obtain organic price premiums, and for which products? (*Open-ended, write-in response.*)

Table 4.7 Circumstances that have made it difficult to obtain organic price premiums, selected comments. *Note*: The complete set of comments from 450 responses, organized by product, are available on OFRF's website, at: *www.ofrf.org/publications/survey/4thNOFS/Q37pricepremiumcomments.pdf.*

State	Product	Comments: Circumstances in which it is difficult to obtain organic price premiums
IA	Alfalfa	*No demand for organic in this area.*
CA	Apples	*Global overproduction and all organic processing plants have left CA.*
WA	Apples	*Over supply on some varieties.*
HI	Avocados	*Cheap Mexican fruit in my market area.*
WI	Barley	*Oversupply.*
VA	Basil	*No markets in close proximity. Rural residents aren't as open to organic as urban. No urban outlet.*
KS	Beef	*Consistent market and infrastructure not yet in place.*
OH	Beef	*Markets seem to be too far away and need better coordination.*
SD	Beef calves	*No local demand.*
OR	Berries	*Available cleaning not certified.*
WA	Berries	*Wholesale reasonable prices have evaporated.*
OR	Blueberries	*Glut of "no spray" berries.*
NY	Cabbage	*Over production on East Coast/transportation difficulties.*
CA	Citrus	*Too much imported fruit.*
NE	Corn	*Follows conventional too closely.*
TX	Cotton	*Imports of cheap organic fiber.*
CA	Cucumber	*Mexican imports flooding market.*
ME	Eggs	*Price of feed puts price at almost $2.00.*
VT	Flowers	*Lack of vendor awareness [and customers too] of the value of organic growing methods.*
WA	Garlic	*Supply varies greatly from season to season.*
CA	Grapes	*Too much produced.*
OK	Herbs	*Lack of education in our area.*
CA	Kiwi fruit	*Roadside stand customers are not passionate about organic.*
VT	Maple syrup	*No one really knows what the difference is--especially here in VT.*
NY	Milk	*Low conventional price puts downward pressure on organic milk.*
WI	Milk	*Market seems some what flooded.*
CO	Millet	*Lack of demand.*
IA	Oats	*Low test weight; feed market scarce.*
TX	Oranges	*No demand for organic product.*
WA	Pears	*Over-production and foreign imports.*
TX	Pecans	*Years of high conventional pecan prices; we receive little or no price premiums for organic..*
WA	Potatoes	*Wholesale reasonable prices have evaporated.*
ME	Produce	*Depressed economy in our region.*
CA	Raisins	*Entire industry in turmoil.*
WA	Raspberries	*False advertising as certified organic by competition with no enforcement of rules.*
CA	Rice	*Lack of forward contracting.*
NJ	Salad mix	*Prevalence of cheap salad mix in stores; customers not making organic vs. non-organic distinction.*
IA	Soybeans	*The percent of stained soybeans has decreased the price.*
CA	Strawberries	*When conventional overproduces too much and drops on the terminal at $3-4/box it pulls the organic price down.*
KY	Tomatoes	*Farmers' market gets flooded with product.*
CO	Sweet corn	*Cheap prices through local supermarket and local economy in recession.*
ND	Wheat, HRS	*Quality must be high to acquire premiums. Lower quality products are hard to sell for organic premium.*
CA	Wine grapes	*'Organic' is nice; but not decisive.*

How much, if any, of your organically grown product was sold into the conventional market in 2001? (*Select one response.*)

·Q38·

Table 4.8. Percentage of organic product produced by respondents in 2001 that was sold into the conventional market. (981 respondents.)

Percentage of product sold as conventional	f	%
0% of product sold	541	**55%**
1% - 25% of product sold	197	**20%**
26% - 50% of product sold	67	**7%**
51-75% of product sold	29	**3%**
76-99% of product sold	37	**4%**
100% of product sold	33	**3%**
Don't know	77	**8%**
Nonresponses = 53		

Table 4.8 summary

Percentage of organic product sold into the conventional market in 2001.

- **55% of respondents indicated that they did not sell any organically grown product into the conventional market.**
- **37% of respondents indicated that some amount of their organically grown product was sold into the conventional market.**
- **Of those respondents who sold organically grown product into the conventional market, the greatest percentage (20% of all respondents) indicated that 1-25% of their organic product was sold that way.**

If you sold any organic product into the conventional market, what circumstances let to selling your organic product as conventional product? (*Select all that apply.*)

·Q39·

Table 4.9 Reasons why organic product was sold into the conventional market. (302 respondents. More than one response per respondent is possible.)

Response categories	f	%
Organic market was unavailable, not found	157	**51%**
Conventional price was good/high	98	**32%**
Grade selection -- culls sold as conventional	49	**16%**
Organic price was low	46	**15%**
Other* reasons	17	**5%**
Nonresponses = 730		

Other reasons included: More production than our area demands; Over supply of organic produce; Closer to home; In transition; Organic market could not handle our short term high volume; Consumer was not interested in "organic," only "local" and "homegrown"; Poorly managed hired salesperson.

Table 4.9 summary

Reasons why organic product was sold into the conventional market.

- **Of those respondents indicating that they sold organically grown product into the conventional market, the majority (51%) indicated that they did so because *an organic market was unavailable*.**
- **32% said they did so because the *conventional price was good or high*.**

·Q40·

Please provide some examples of the organically grown products that were among the most important economically to your farm in 2001. *For each item listed, indicate yield, type of units sold, and lowest, highest and average prices received for these products during the year. Examples may include raw/unprocessed and/or value-added products. List up to five products.*

Table 4.10a Yield and price data for selected herb, ornamental, greenhouse and specialty crops and products.

		2001 yields			Price received, 2001 (in dollars)			
Total Resp.No.	Product and yield, price units	Yield Calc No.	Lowest	Highest	Price Calc No.	Lowest	Highest	Average
13	Basil (#/ac, per #)	2	6,400 #/ac	10,000 #/ac	7	3.00/#	24.00/#	8.74/#
4	Christmas trees (per tree)	-	-	-	2	20.00/tree	150.00/tree	-
18	Flowers (per bunch)	-	-	-	17	1.00/bunch	15.00/bunch	5.20/bunch
14	Herbs (#/ac, per #)	2	1,200 #/ac	3 #/ac	4	.38/#	10.50/#	5.21/#
4	Herbs, medicinal (per #)	-	-	-	2	3.10/#	40.00/#	-
6	Lavender (per bunch)	-	-	-	3	2.50/bunch	6.50/bunch	4.38/bunch
9	Mushrooms, shiitake (per #)	-	-	-	6	4.00/#	50.00/#	14.90/#
5	Parsley (per #)	-	-	-	3	2.50/#	5.00/#	3.07/#

Total Response No. = the entire number of respondents mentioning the product category as important.
Yield Calc No. = the number of responses utilized to calculate yield data for the indicated product category.
Price Calc No. = the number of responses utilized to calculate price data for the indicated product category.
Respondents were asked for lowest, highest and average yield figures; average yield figures are calculated from those stated averages.

Table 4.10b Yield and price data for selected vegetable crops.

		2001 yields				Price received, 2001 (in dollars)			
Total Resp. No.	Product and yield, price units	Yield Calc No.	Lowest	Highest	Median	Price Calc No.	Lowest	Highest	Average
8	Arugula (per #)	-	-	-	-	3	7.00/#	10.00/#	7.50/#
14	Asparagus (#/ac, per #)	3	200 #/ac	2100 #/ac	400 #/ac	8	0.83/#	5.00/#	2.58/#
25	Beans, snap (#/ac, per #)	3	500#/ac	1,500#/ac	1000#/ac	17	0.70/#	6.00/#	2.37/#
9	Beets (per #)	-	-	-	-	5	1.00/#	4.00/#	1.52/#
10	Broccoli (cases/ac, per #)	3	480 cases/ac	600 cases/ac	510 cases/ac	3	0.60/#	1.85/#	1.03/#
6	Cantaloupe (#/ac, each)	1	-	-	18,000 #/ac	3	0.30/ea	2.00/ea	1.28/ea
22	Carrots (#/ac, per #)	2	5,000 #/ac	20,000 #/ac	-	9	0.70/#	2.49/#	1.21/#
	Carrots (per 25#)	-	-	-	-	3	18.00/25#	25.00/25#	19.80/25#
5	CSA Shares (per share)	-	-	-	-	4	300.00/share	740.00/share	515/share
17	Cucumbers (each)	1	-	-	400 bu/ac	6	0.25/ea	2.00/ea	0.96/ea
	Cucumbers (per #)	-	-	-	-	3	0.24/#	2.00/#	0.97/#
5	Eggplant (per #)	-	-	-	-	2	0.99/#	1.50/#	-
69	Garlic (#/ac, per #)	5	700 #/ac	7,900 #/ac	6,000 #/ac	38	1.00/#	15.00/#	4.99/#
8	Kale (per bunch)	-	-	-	-	5	16.00/24 bunches	24.00/24 bunches	21.00/24 bunches
44	Lettuce (case/ac, per #)	4	300 case/ac	1,200 case/ac	640 case/ac	9	1.00/#	7.00/#	3.60/#
	Lettuce (heads/ac, per head)	6	1,200 heads	45,000 heads	6,500 heads	21	0.25/head	2.00/head	1.27/head
15	Melons (per #)	-	-	-	-	10	0.25/#	1.50/#	0.65/#
17	Onions (per #)	-	-	-	-	9	0.60/#	4.00/#	1.33/#
13	Peas (per #)	-	-	-	-	10	1.00/#	25.00/#	4.19/#
15	Peppers (per #)	-	-	-	-	8	1.00/#	4.00/#	2.03/#
65	Potatoes (#/ac, per #)	3	8,000 #/ac	20,000 #/ac	9,000 #/ac	43	0.25/#	5.00/#	1.51/#
	Potatoes (per 50#)	-	-	-	-	6	8.50/50#	100.00/50#	25.88/50#
5	Pumpkins (tons/ac, each)	1	-	-	12 tons/ac	3	1.00/each	10.00/each	4.33/each
68	Salad mix (#/ac, per #)	4	1,000 #/ac	6,700 #/ac	3,500 #/ac	31	3.00/#	15.00/#	7.00/#
4	Shallots (per #)	-	-	-	-	2	4.50/#	4.80/#	-
18	Spinach (per #)	-	-	-	-	6	3.00/#	12.00/#	6.57/#
7	Squash, summer (per 20#)	-	-	-	-	3	6.00/20#	32.00/20#	5.33/20#
30	Squash, winter (#/ac, per #)	4	150 #/ac	10,000 #/ac	4,175 #/ac	17	1.00/#	4.00/#	1.45/#
15	Sweet Corn (tons/ac, per doz)	2	4.2 tons/ac	4.5 tons/ac	-	6	1.00/doz	3.50/doz	2.51/doz
90	Tomatoes (#/ac, per #)	7	2,000 #/ac	32,000 #/ac	15,000 #/ac	66	1.00/#	5.00/#	1.99/#
	Tomatoes (tons/ac, per 20#)	5	6 tons/ac	48 tons/ac	12 tons/ac	5	10.00/20#	40.00/20#	24.88/20#
7	Tomatoes, cherry (per pint)	-	-	-	-	7	1.30/pint	4.00/pint	2.88/pint

Total Response # = the entire number of respondents mentioning the product category as important.
Yield Calc # = the number of responses utilized to calculate yield data for the indicated product category.
Price Calc # = the number of responses utilized to calculate price data for the indicated product category.
Respondents were asked for lowest, highest and average yield figures; average yield figures are calculated from those stated averages.

Table 4.10c Yield and price data for selected fruit, nut and tree crops.

		2001 yields				Price received, 2001 (in dollars)			
Total Resp. No.	Product and yield, price units	Yield Calc No.	Lowest	Highest	Median	Price Calc No.	Lowest	Highest	Average
3	Almonds (#/ac, per #)	1	-	-	800#/ac	2	2.50/#	4.50/#	3.80/#
52	Apples (bins/ac, per bin)	8	14 bins/ac	48 bins/ac	26 bins/ac	10	2.75/bin	293.00/bin	130.40/bin
	Apples (bu/ac, per bu)	3	20 bu/ac	40 bu/ac	25 bu/ac	8	1.30/bu	60.00/bu	21.83/bu
	Apples (tons/ac, per ton)	4	1.53 tons/ac	40 tons/ac	9.5 tons/ac	3	75.0/ton	200.00/ton	123.00/ton
	Apples (per box)	-	-	-	-	8	.75/40#box	40.00/40#box	21.15/40#box
	Apples (per #)	-	-	-	-	7	0.08/#	2.00/#	0.89/#
6	Apricots (bu/ac, 20#box)	1	-	-	80 bu/ac	2	16.00/20# box	40.00/20# box	24.00/20# box
8	Avocado (#/ac, per #)	4	3,000 #/ac	8,000 #/ac	5,500 #/ac	5	0.30/#	5.00/#	1.46/#
15	Blueberries (#/ac, per #)	3	4,000#/ac	12,000/ac	7,000#/ac	3	1.00/#	3.00/#	2.20/#
	Blueberries (per pt)	-	-	-	-	5	1.00/pt	5.00/pt	2.93/pt
11	Cherries (#/ac, per #)	3	1,500#/ac	14,000#/ac	6,750#/ac	5	.80/20#	40.00/20#	22.02/20#
3	Coffee #/ac, per #)	1	-	-	250 #/ac	2	13.00/1# bag	20.00/1# bag	-
3	Cranberries (#/ac, per #)	2	1,800 #/ac	3,000 #/ac	-	2	2.00/#	5.50/#	-
4	Dates (#/ac, per #)	1	-	-	75,000 #/ac	4	2.25/#	57.00/#	11.00/#
3	Grapefruit (#/ac, per #)	1	-	-	3,600 #/ac	2	0.02/#	0.27/#	-
9	Grapes, table (tons/ac, per ton)	5	4 tons/ac	10 tons/ac	5 tons/ac	5	5.50/ton	1,500/ton	549.00/ton
5	Grapes, wine (tons/ac, per ton)	5	2.5 tons/ac	4 tons/ac	3.5 tons/ac	2	23.00/ton	50.00/ton	-
8	Kiwi (#/ac, per #)	2	5,000 #/ac	11,627 #/ac	-	2	0.80/#	1.00/#	-
	Kiwi (per tray)	-	-	-	-	2	5.50/7# tray	8.50/7# tray	-
6	Maple syrup (gal/ac, per gal)	3	150 gal/ac	175 gals/ac	175gal/ac	5	20.00/gallon	64.00/gallon	37.00/gallon
3	Nectarines (boxes/ac, per #)	2	368 boxes/ac	538 boxes/ac	-	2	1.00/#	2.75/#	-
17	Peaches (#/ac, per #)	3	7,000 #/ac	20,000 #/ac	7,500 #/ac	7	1.20/#	5.00/#	2.12/#
	Peaches (bu/ac, per box)	4	80 bu/ac	450 bu/ac	325 bu/ac	5	10.00/20# box	32.00/20# box	18.93/20# box
16	Pears (tons/ac, per box)	4	2 tons/ac	28 tons/ac	5 tons/ac	3	9.00/42# box	35.00/42# box	16.50/42# box
	Pears (bu/ac, per bu)	2	25 bu/ac	50 bu/ac	-	4	6.00/bu	35.00/bu	18.00/bu
4	Pears, Asian (per 10# box)	-	-	-	-	2	8.00/10# box	19.00/10# box	-
2	Pecans (per #)	-	-	-	-	2	0.90/#	1.00/#	-
2	Persimmons (#/ac, per #)	1	-	-	8,000 #/ac	2	0.25/#	1.50/#	-
7	Plums (#/ac, per #)	1	-	-	6,000 #/ac	2	1.00/#	1.75/#	-
10	Raspberries (pts/ac, per pt)	4	60 pts/ac	6,000 pts/ac	3,500 pts/ac	7	2.00/pt	8.00/pt.	3.52/pt.
18	Strawberries (#/ac, per pt)	1			520 #/ac	8	1.00/pt	4.00/pt	2.15/pt
	Strawberries (qts/ac, per qt)	2	200 qts/ac	1,400 qts/ac	-	4	2.50/qt	6.00/qt	4.00/qt
11	Walnuts (#/ac, per #)	3	2,000 #/ac	4,000 #/ac	2,000 #/ac	9	0.35/#	3.30/#	1.78/#

Total Response No. = the entire number of respondents mentioning the product category as important.
Yield Calc No. = the number of responses utilized to calculate yield data for the indicated product category.
Price Calc No. = the number of responses utilized to calculate price data for the indicated product category.
Respondents were asked for lowest, highest and average yield figures; average yield figures are calculated from those stated averages.

Table 4.10d. Yield and price data for selected field crops.

		2001 yields				Price received, 2001 (in dollars)			
Total Resp. No.	Product and yield, price units	Yield Calc No.	Lowest	Highest	Median	Price Calc No.	Lowest	Highest	Average
30	Alfalfa (tons/ac, per ton)	24	.18 tons/ac	7.5 tons/ac	3 tons/ac	22	30.00/ton	185.00/ton	102.00/ton
	Alfalfa (bale/ac, per bale)	2	12 bales/ac	50 bales/ac	31 bales/ac	1	35.00/bale	50.00/bale	-
18	Barley (bu/ac, per bu)	14	1 bu/ac	60 bu/ac	30 bu/ac	7	1.69/bu	8.40/bu	3.18/bu
	Barley (per cwt)	-	-	-	-	3	4.50/cwt	5.00/cwt	4.36/cwt
	Barley (per ton)	-	-	-	-	2	150.00/ton	185.00/ton	173.33/ton
5	Beans, dry (cwt/ac)	1	-	-	22 cwt/ac	3	32.00/cwt	53.00/cwt	44.00/cwt
9	Buckwheat (bu/ac, per #)	3	10 bu/ac	62.85 bu/ac	15 bu/ac	3	.12/#	.23/#	.17/#
	Buckwheat (#/ac, per cwt)	2	500 #/ac	600 #/ac	550 #/ac	2	10.25/cwt	11.00/cwt	-
112	Corn (bu/ac, per bu)	78	10 bu/ac	172 bu/ac	90 bu/ac	65	1.90/bu	16.00/bu	4.23/bu
	Corn (tons/ac, per ton)	5	2 tons/ac	22 tons/ac	2.80 tons/ac	8	1.80/ton	195.00/ton	113.50/ton
2	Cotton (#/ac, per #)	2	-	-	147.50 #/ac	1	.85/#	1.25/#	-
7	Flax (per bu)	6	3 bu/ac	112 bu/ac	13 bu/ac	6	9.00/bu	17.00/bu	11.36/bu
35	Hay (per ton)	14	1.1 tons/ac	6.5 tons/ac	3 tons/ac	13	13.00/ton	175.00/ton	102.00/ton
	Hay (per bale)	-	-	-	-	15	1.50/bale	100.00/bale	13.22/bale
2	Lentils (by bu, per #)	1	-	-	18 bu/ac	2	.3/#	.5/#	-
8	Millet (bu/ac, per bu)	6	15 bu/ac	65 bu/ac	27.50 bu/ac	2	3.10/bu	5.00/bu	-
23	Oats (bu/ac, per bu)	17	27 bu/ac	100 bu/ac	60 bu/ac	17	1.75/bu	5.50/bu	2.40/bu
	Oats (per ton)	-	-	-	-	3	75.00/ton	189.50/ton	123.00/ton
1	Peanuts (tons/ac, per ton)	1			1 ton/ac				7.25/ton
3	Popcorn (bu/ac)	2	45 bu/ac	50 bu/ac	-		-	-	-
5	Rice (cwt/ac, per cwt)	2	40 cwt/ac	65 cwt/ac	-	4	14.00/cwt	27.00/cwt	17.50/cwt
	Rice (#/ac)	2	6,000 #/ac	6,700 #/ac	-	-	-	-	-
2	Rye (bu/ac, per bu)	2	30 bu/ac	50 bu/ac	-	2	2.75/bu	5.00/bu	-
151	Soybeans (bu/ac, per bu)	139	5 bu/ac	77 bu/ac	27 bu/ac	130	1.10/bu	19.00/bu	11.60/bu
10	Spelt (#/ac, per #)	4	2,200 #/ac	3,300 #/ac	-	7	0.095/#	0.15/#	.116/#
5	Sunflowers (bu/ac, per #)	1	-	-	30 bu/ac	3	0.14/#	0.18/#	0.16/#
1	Tobacco (#/ac)	1	-	-	2000#/ac	1	-	-	-
75	Wheat (bu/ac, per bu)	62	4 bu/ac	87 bu/ac	30 bu/ac	70	1.40/bu	8.00/bu	5.00/bu

Total Response No. = the entire number of respondents mentioning the product category as important.
Yield Calc No.= the number of responses utilized to calculate yield data for the indicated product category.
Price Calc No. = the number of responses utilized to calculate price data for the indicated product category.
Respondents were asked for lowest, highest and average yield figures; average yield figures are calculated from those stated averages.

Table 4.10e Price data for selected livestock and animal products

		Price received, 2001 (in dollars)			
Total Resp. No.	Product and price units	Price Calc No.	Lowest	Highest	Average
22	Beef (per #)	11	0.80/#	12.99/#	4.23/#
	Beef (hanging)	4	1.00/# hanging	2.00/# hanging	1.54/# hanging
6	Cheese (per #)	5	5.99/#	8.99/#	7.92/#
11	Chickens (per #)	6	1.60/#	10.00/#	3.18/#
27	Eggs (per doz)	24	0.40/doz	3.50/doz	2.25/doz
7	Hogs (per #)	5	0.55/#	5.00/#	2.64/#
2	Honey (per #)	1	-	-	5.00/#
8	Lamb (per #)	5	3.00/#	5.00/#	3.63/#
53	Milk (per cwt)	37	9.25/cwt	23.00/cwt	10.41/cwt
2	Turkeys (per #)	1	-	-	3.00/#

Total Response No. = the entire number of respondents mentioning the product category as important.
Price Calc No. = the number of responses utilized to calculate price data for the indicated product category. Respondents were asked for lowest, highest and average yield figures; average yield figures are calculated from those stated averages.
Yield data were not obtained for livestock products.

Using a scale of 1 (not a problem) to 5 (severe problem) please indicate to what degree the following production, market or regulatory conditions have served as problems specific to delivering your certified organic product(s) to market, or to your farm's profitability during the past three years. (*Select one response per category.*)

·Q41·

Table 4.11. Degree to which organic production, market or regulatory conditions have served as problems during the past three years.

Production, market and regulatory conditions	Average ranking	f
Production conditions		
Weather-related production losses	2.92	971
High input costs	2.41	949
High labor costs	2.32	937
Weed-related production losses	2.28	953
Production losses due to pests or diseases	2.27	956
Availability of labor to produce and/or get product to market	2.18	940
Finding desired seed/stock appropriate to organic production	2.17	935
Organic processing facilities unavailable (for crops and/or livestock)	1.96	899
Fertility-related production losses	1.94	944
Pesticide or herbicide drift/contamination of your product	1.34	939
Contamination of your product from genetically modified organisms (GMOs)	1.29	922
Market conditions		
Obtaining organic price premiums	2.42	924
Lack of organic marketing networks	2.34	894
Distance to available organic market(s) and/or delivery point	2.22	918
Organic prices falling	2.21	909
Unstable organic market and/or prices	2.19	915
Existing organic markets are over-supplied, flooded	2.18	922
Lack of organic price information	2.16	919
Finding organic markets for your organic products	2.15	952
Obtaining access to existing organic markets	2.06	924
Competition in market with unverified, "claimed" organic products	2.00	910
Customer volume requirement limits sales in certain markets	1.95	895
Competition with organic product imports from other countries	1.95	910
Competition with non-organic "Eco-labels"	1.78	893
Finding any market for your organic products	1.76	939
Customer packaging and/or transport requirements limits sales in certain markets	1.75	890
Exclusion from market(s) due to market consolidation	1.72	896
Exclusion from markets(s) due to product consolidation	1.64	885
Non-acceptance of certification documentation in certain markets	1.31	917
Regulatory conditions		
Organic certification costs	2.57	950
Organic certification regulatory requirements/standards	2.18	942
Food safety regulatory requirements/standards	1.83	914

Table 4.11 summary

Degree to which organic production, market or regulatory conditions have served as problems during the past three years (ranked list).

Table 4.11 identifies "problems" as ranked by various production, market or regulatory conditions. The top eight "problems" as ranked from all thirty-two categories are, in descending order of importance are:

- ***Weather-related production losses***
- ***Organic certification costs***
- ***Obtaining organic price premiums***
- ***High input costs***
- ***Lack of organic marketing networks***
- ***High labor costs***
- ***Weed-related production losses***
- ***Production losses due to pests or diseases***

***Note*: It should be stated that these responses, based on our scale of 1(not a problem) to 5 (serious problem) suggest that overall, respondents do not consider the conditions provided on this list to be "serious" problems; no single response category received an average ranking over "3".**

·Q42a· The USDA National Organic Program Final Rule will go into effect on October 21, 2002. The Final Rule may have positive and/or negative impacts on organic producers. What impacts of the impending Final Rule are you experiencing now? (*Open-ended, write-in response.*)

Figure 4.3—Current effect of the USDA National Organic Program Rule implementation, as summarized from write-in responses. (782 respondents, 796 responses tabulated.)

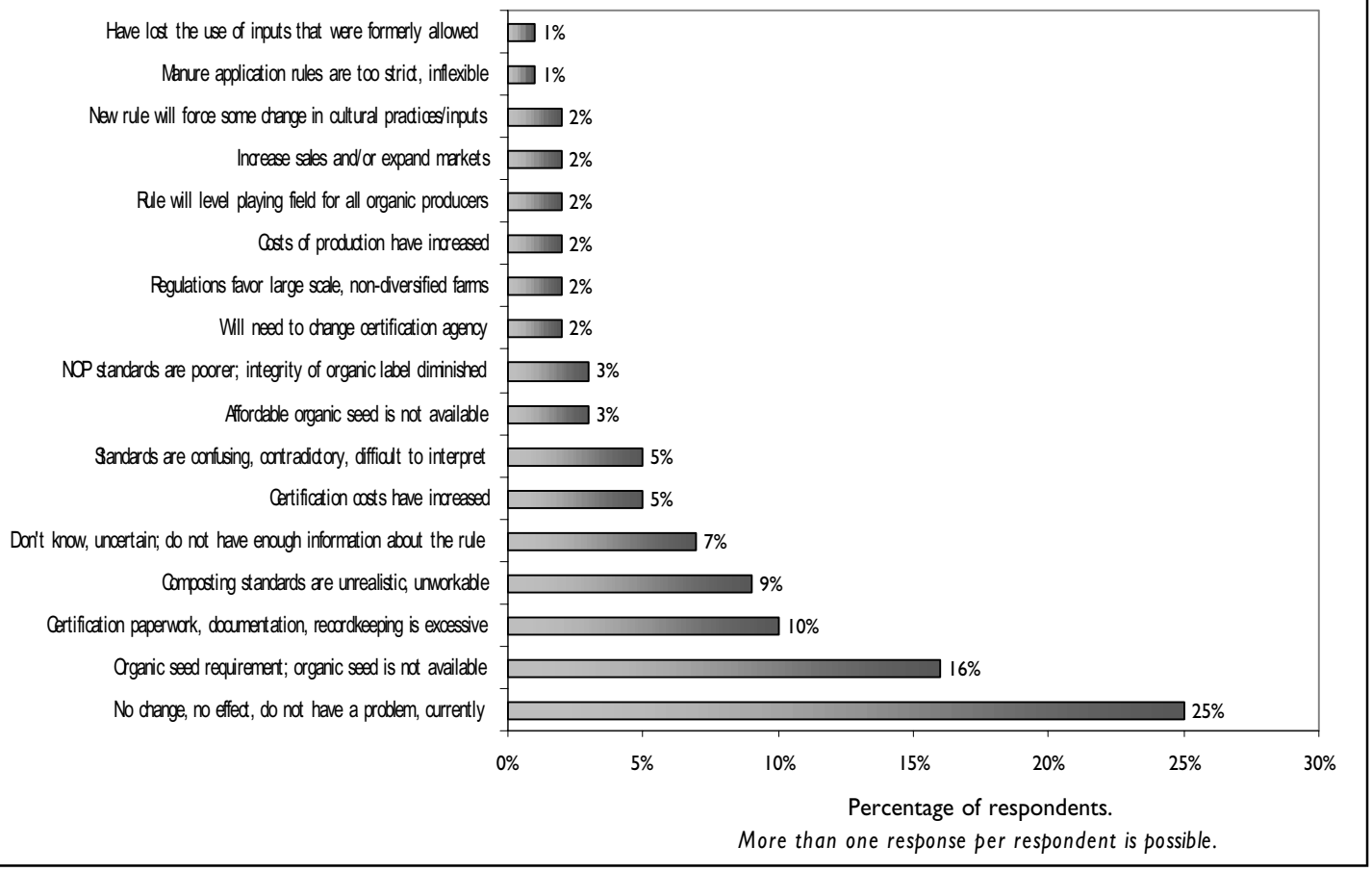


Figure 4.3 summary

Respondents' perceptions of the current effect of the USDA's NOP Rule, as of spring 2002.

In general, about 68% of the respondents' write-in answers reflected a perception that the National Organic Program Rule will have a negative impact on them as an organic producer. About 27% of the responses may be characterized as neutral to positive (such as I *don't know, uncertain, no effect, no change* or *no problem*), and about 5% of the responses could be categorized as anticipating a definite positive effect. In a number of cases, respondents shared what they perceived as both the "pros and cons" of the Program.

The greatest number of respondents (25%, f=199) indicated a perception that the upcoming NOP Rule would have *no effect*, present *no change*, or represent *no problem* for their organic farm operation.

Sixteen percent of respondents (f=156) indicated that their greatest difficulty with the new organic standard would be the requirement of using organically grown seed or propagation stock, and related to that, the burden of documenting their efforts to find organic seed or stock, including livestock.

Many of these respondents referred to some combination of the availability and/or affordability of organic seed or stock, particularly in varieties suitable to their operation, and the time and labor required to document procurement efforts, which in turn was often expressed as an increase in the cost of organic production.

Ten percent of respondents (f=78) indicated that certification paperwork in general—or in particular the anticipated increase in paperwork incurred by the new Program—is or will be a problem.

Standards related to compost and composting were perceived by 9% of respondents (f=72) as burdensome, unrealistic, and/or antithetical to the values of organic farming and the functioning of organic farming systems. In addition to the difficulty in processing compost, again, the documentation required to manage compost production and use was often cited as a burden. Manure standards, particularly related to animals in crop fields, were also noted as a problem.

Respondents cited increases in certification costs, either already incurred or anticipated, as a negative result of the National Organic Program (5%, f=45). Several respondents expressed the concern that the costs of certifier accreditation have already been or will be transferred to the organic producer. Five percent of respondents indicated that the National Organic Standards are confusing, contradictory and difficult to interpret. Also expressed were concerns that the National Organic Program standards favor large-scale, non-diversified farms (in part due to the paperwork required by organic certification to represent each element of a diversified farm), and that the integrity of organic standards remain "at risk" due to pressure from special interests, in particular corporations with significant lobbying power.

Table 4.12 Current effect of USDA National Organic Program Final Rule, selected comments.
Note: The complete set of comments from 782 respondents are available on OFRF's website:
www.ofrf.org/publications/survey/4thNOFS/Q42NOPcomments.pdf

Selected responses related to seed procurement and certification paperwork:

Availability of organic seeds is limited; not all are available.
Finding organic seed in varieties that grow well locally [is an impact of the NOP].
Have huge difficulty finding certified organically produced seeds.
Lack of certified seed on market and very high costs of these considering organic prices in general are falling.
Cannot find replacement animals.
The paperwork is a nightmare.
Understanding what is allowed and not allowed is difficult to understand and obtaining organic seed and seed stock is too pricey and difficult.
Excessive documentation makes it hard for smallest part time producer with occasional labor.

Selected responses related to compost and manure management:

Compost standards are overdone—too hard for small scale on-farm composting.
Getting our compost operations up to the standards [is an impact of the NOP].
I can't use the limited compost I produce without prohibitive recording.
Compost regulations are creating uncertainty and compliance issues.
Will stop making compost piles. Paperwork for internal temperature is ridiculous.
The composting requirements are absurd. You can't turn compost that often on a small farm. The time between applying manure and harvesting a crop is too long.
Inability to produce or procure good finished compost.
Regulations surrounding compost and manure use are bad—written by people who do not know enough about the microbiology of compost and soil.
How in the world could I even meet such stupid composting requirements.
Eliminating animals in our orchard to feed would be a questionable and stupid move; they are a weed control and fertilizer source, and a grass mowing advantage.

Selected responses related to certification costs and organic integrity under the National Organic Program:

Our certification fees doubled in 2002, and the renewal application took longer to fill out.
The price of certification has gone up because of the thousands of dollars [my certifier] had to spend to restructure and apply for accreditation.
We will no longer certify. Recordkeeping not applicable to diversified, small market growers.
Will not be certified after 2002, because we see the USDA rules favoring large operations over small farms.
Will not certify again—too expensive, excessive paperwork and extra cost.
I am concerned about increased competition from relaxed standards.

·Q42b· **What impacts of the impending Final Rule do you anticipate over the next few years?** (*Open-ended, write-in response.*)

Figure 4.4—Future effect of the USDA National Organic Program Rule (over the next few years), as summarized from write-in responses. (585 respondents, 585 responses tabulated.)

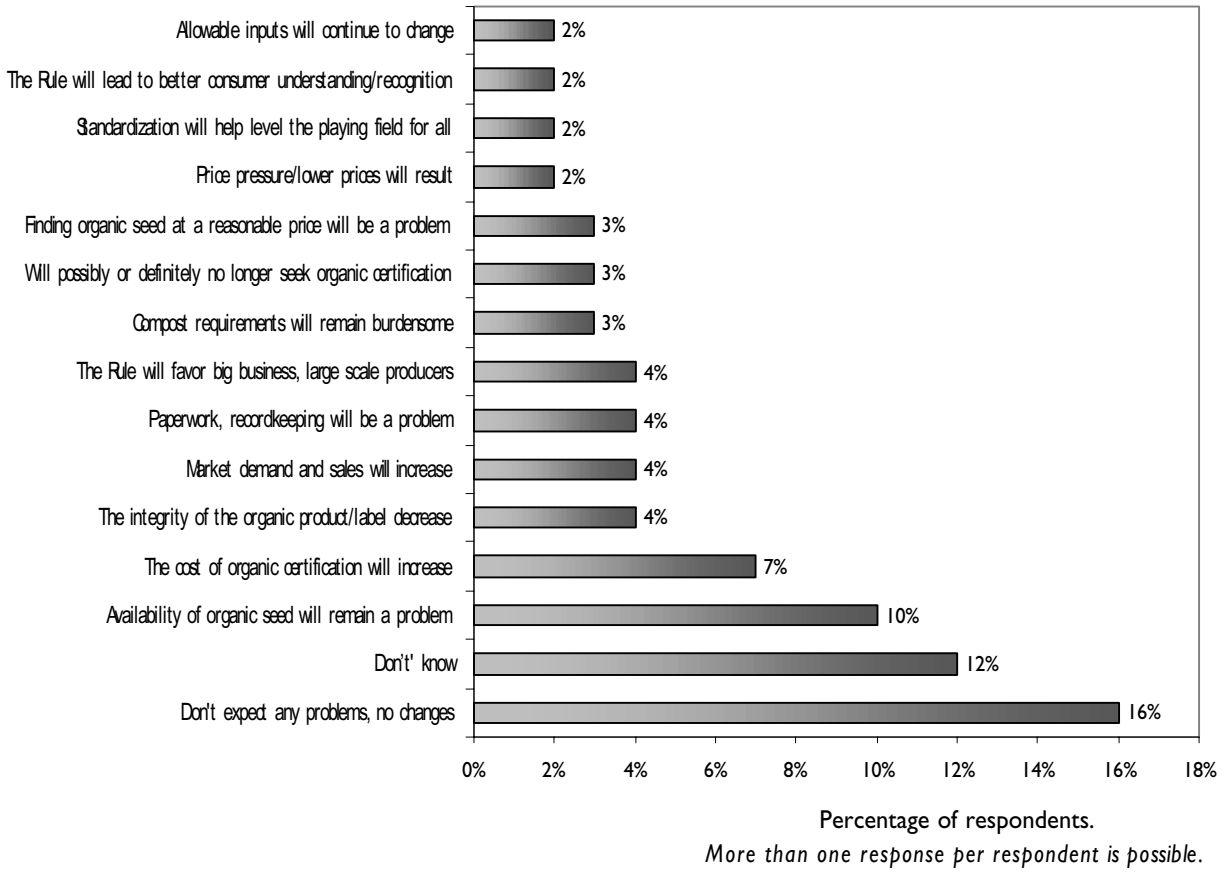


Figure 4.4 summary

Future effect of the USDA NOP Final rule.

- **Responses were similar to those related to "current" effects of the NOP. The greatest percentage of respondents (16%, f=94) anticipated *no problems* or *no changes*; followed by those who indicated they are *unsure* or *don't know* (12%, f=69).**
- **Concerns for the future expressed by respondents included *availability of organic seed, cost of certification*, and maintaining *organic integrity*.**
- **In addition, respondents felt that the NOP Rule could *increase market share for organic*.**

What production, market or regulatory conditions currently have the greatest negative impact on the economic sustainability of your organic farming operation? (*Open ended, write-in response structure.*)

·Q43·

Table 4.13 Production, market and regulatory conditions having the greatest negative impact on economic stability of organic farm operations. (535 respondents; 641 responses more than one response per respondent is possible.)

No. of respondents	Response category	Additional comments provided by respondents
	Production conditions	
34	*Cost of certification; quality of service*	*Certification fees doubled in one year; higher cost and lower level of service; uninformed certifiers*
33	*Cost and availability of inputs*	*Of organic feed; of purchased dairy protein supplements; dairy quality hay, for worm-free fruit; for apples; fertilizers; raw materials; unhulled millet*
30	*Cost and availability of labor*	*Finding labor; cost of labor; high minimum wage; competition with farms using migrant labor force*
27	*Weather, poor conditions*	*Especially drought; frosts*
15	*Fertility management*	*Building fertility on damaged land, finding sufficient nitrogen sources*
11	*Pest management*	*Pecan nut caseborer, codling moth, pocket gophers, small mammals, deer, avocado pests spread by Mexican imports, cherry fruit fly, walnut husk fly, apple maggot, new apple worm; no effective sheep wormer*
10	*Weed management*	*In orchards; under irrigation*
9	*GMO drift*	*Cannot grow organic corn in region; GMO contamination affecting purity of seed*
7	*Cost of land*	*Development pressure*
7	*Cost of insurance and insurance concerns*	*Affording health, liability and workers comp insurance; sufficient crop insurance for organic*
7	*Disease management*	*Apple scab, soybean staining*
7	*Processing facilities, lack of*	*For meat/livestock; for small scale dairy & eggs; for livestock feed; lack of USDA inspected facilities*
5	*Cost of fuel, transportation*	
5	*Cost of production, high*	
4	*Cost, availability of water*	*Cost of power for irrigation; irrigation water shut-off water in Klamath Basin*
4	*Equipment, ability to obtain*	*For post harvest handling; processing*
2	*Costs & fees, general*	*Farmers market fees; broker fees*
2	*Lenders, bankers have limited interest in or knowledge of organic*	
1	*Pesticide drift*	

Table 4.13 is continued on next page...

Table 4.13, cont'd. Production, market and regulatory conditions having the greatest negative impact on economic stability of organic farm operations.

No. of respondents	Response category	Additional comments provided by respondents
	Market conditions	
40	*Competition with large scale producers*	*Large scale producers drive down price, glut market, federal subsidies to large producers; low migrant labor costs on large farms in California; organic factory-style production; pressure to get big or get out; undercuts local & regional sustainability*
35	*Competition with organic imports*	*Questionable certification & standards, point of origin labeling not required; imported herbs*
34	*Prices, low*	*Falling prices in general, falling prices in: dairy, apples, grain, safflower soybeans; organic prices are linked to conventional price; price doesn't support cost of organic production, price pressure, lower premiums; difficulty obtaining organic premiums; strong dollar*
27	*Buyer consolidation in organic marketplace*	*Among distributors; among processors; in dairy industry; among retailers: retailer price gouging: 2-4x FOB; natural food store chains no longer buy local*
27	*Buyers & markets, finding*	*Local markets; for grain; for livestock/meat products; export, wine grapes; dairy; livestock feed; soft markets: may have to go back to conventional farming to "farm" the farm program; finding wholesale market at fair price*
25	*Market saturation, overproduction*	*In soybeans especially; apples; raisins*
19	*Consumer's lack of knowledge about food and food systems*	
11	*Distance to markets*	*For delivering hay; distance to good co-ops; to processor*
7	*Marketing networks and support are lacking*	*Too few organic farms; lack of networks normally provided to conventional farmers*
6	*Corporate, agribusiness control of food system*	
6	*Consumer perception of organic*	*Perception of organic wine in particular; Hudson Institute anti-organic media campaign; consumer mistrust, confusion regarding labeling*
6	*Unstable market conditions*	*In cotton; in walnuts; organic feeds for livestock; bankruptcy among wholesalers*
5	*Payment, receiving timely, reliable*	
4	*Determining best or fair price*	*On grains, on beef cuts: quarters & halves, on fruit*
3	*Buyer volume requirements*	
3	*Commodification of organic*	*Organic following conventional industrial model*
3	*Competition with "claimed" organic product in marketplace*	
2	*Buyers not honoring contracts*	*Contracts protect only buyers*

Table 4.13 is continued on next page...

Table 4.13, cont'd. Production, market and regulatory conditions having the greatest negative impact on economic stability of organic farm operations.

No. of respondents	Response category	Additional comments provided by respondents
	Regulatory conditions	
27	*NOP standard: organic seed & transplants*	*Seed availability, prices; transplant requirements; limited organic sources and selections; poor seed sources; much more expensive; cut flower transplants cost prohibitive; unfamiliar with seed that is available*
22	*NOP standard: compost*	*Overzealous; impossible data requirements; will make it impossible to make compost on farm*
21	*Regulatory framework of organic in general*	*Is burdensone; is counterproductive; costs exceed benefits; not sensitive to regional conditions; makes split production difficult*
19	*NOP standards: in general and mixed responses*	Rotation requirements: forced to grow unprofitable small grains; buffer requirements; lack of textile representation makes it difficult to market; unscientific standards; certifier conflict of interest (Board of Directors, advice to producers); rules are confusing, conflicting; SO_2 levels in wine
15	*FDA & state food safety regulations*	*HACCP; for value-added; commercial kitchen requirements*
15	*Paperwork*	*Cost of maintaining; excessive; convoluted*
8	*NOP standard: manure*	*Difficult for small scale producers; verification of GMO free raw manure*
7	*NOP standard: organic feed*	*High price, lack of feed inspection of dairy suppliers, lack of chicken feed; rule should be 100% organic*
6	*USDA cheap food policy*	
5	*NOP standards represent lower organic standard*	*Enforcement concerns; loopholes*
5	*Taxes and tax documentation*	
3	*Check-off programs*	*Corn & soybean: no benefit to organic; California tree fruit marketing order cosmetic rule*
3	*NOP standard: livestock acquisition*	*Allows some to bring in non-organic livestock; lowers value of organic replacements*
1	*Farm Bureau influence on agricultural policy*	
1	*State Dept. of Agriculture provides no support for organic*	

Information and Services

When you look for information on organic markets and marketing, how frequently do you use the following resources, and how useful are they?
(*Indicate frequency used and rank usefulness from 1=never useful, 4=very useful.*)

·Q44·

Table 5.1 Respondents' assessment of organic marketing information resources, ranked by order of usefulness to all users.

Information source	Average usefulness, all users (4=very, 1=never)	Average usefulness, all respondents (4=very, 1=never)	% of respondents using (f=1,034)	Among users, average of frequency used (No. of times/year)
Other farmers	3.3	3.1	**52%**	17.9
Conferences/workshops/ seminars	3.2	2.7	**26%**	4.2
Newsletters/magazines	3.1	2.8	**31%**	13.1
Books	3.1	2.5	**19%**	16.8
Buyers	3.1	2.5	**36%**	15.8
Marketing cooperative	3.1	1.8	**12%**	10.5
Organic certification agency	3.0	2.5	**34%**	7.9
Individual consumers, customers	3.0	2.4	**29%**	36.5
Appropriate Technology Transfer to Rural Areas	3.0	1.7	**11%**	3.5
Internet-based resources	2.9	2.2	**19%**	33.1
Growers associations	2.9	2.0	**18%**	6
Other non-profit organizations	2.9	1.6	**9%**	6.1
University-based resources	2.6	1.8	**15%**	5.3
State Agriculture Department	2.6	1.6	**16%**	4.8
USDA	2.3	1.3	**7%**	3.8

Table 5.1 summary

Respondents' assessment of organic marketing information resources.

- **Respondents indicated that *other farmers* are the most useful resource for organic marketing information and that they use them the most frequently.**
- **Public resources that normally provide agricultural services—*university-based resources, state agricultural departments* and USDA—were ranked as the least useful resources. USDA was ranked as the least useful resource and was among the resources used least frequently by respondents.**

·Q45· Using a scale of 1 (not useful) to 5 (very useful), please indicate how useful the following information and/or services would be to improving your ability to effectively market your certified organic product(s), and/or to positively affect your position in the organic marketplace.

Table 5.2 summary

Information or services that would be most useful to help market organic products.

- **Respondents identified *consumer education about organic food and farming* as the most important means of improving their markets. Over the course of OFRF's four national surveys, respondents have consistently identified this as a top need.**
- **Also, consistent with responses to other parts of this survey, respondents emphasized interest in *local and regional organic market development and consumer education*, which was identified as the second most useful service.**
- **O*rganic-specific research & Extension services*, *organic price reporting services* and *directories of organic product buyers* were also identified as useful services and information.**

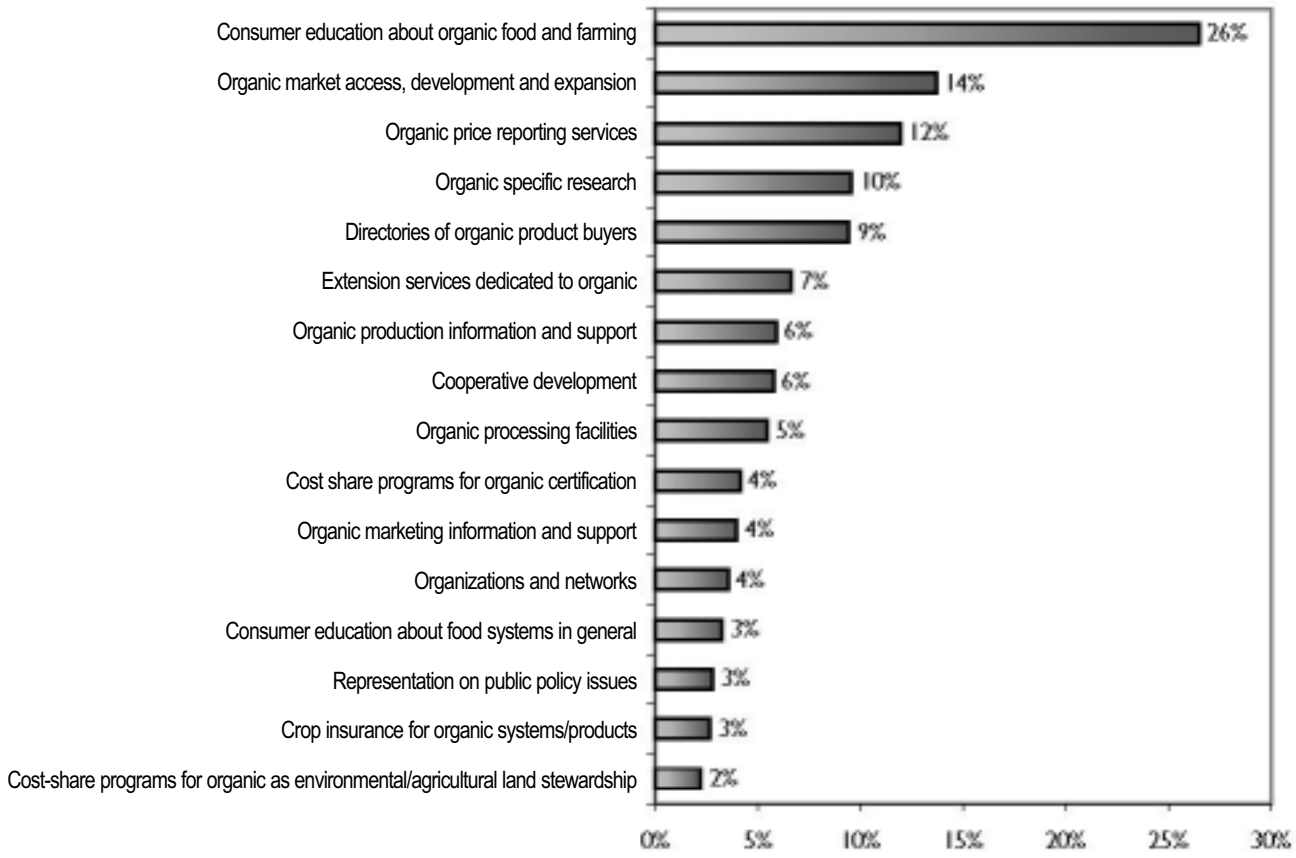
Table 5.2 Information or services presented in order of "most useful" to "least useful" to help market organic products, as ranked by all respondents.

Information or service	Ranking	f
Consumer education programs about organic food and farming	3.96	902
Local/regional organic market development & consumer education	3.84	897
Organic-specific research & Extension services	3.79	881
Organic price reporting services	3.51	910
Directories of organic product buyers	3.48	911
Direct-to-consumer market information/development	3.46	886
Representation on public policy issues affecting organic markets	3.46	867
Organic processing facilities	3.37	883
Development of organic marketing cooperatives and associations	3.36	881
Direct-to-retail buyer market information	3.30	883
Cost-share programs for annual organic certification	3.17	883
Cost-share programs for organic as environmental/agricultural land stewardship	3.16	859
Wholesale market information/development	3.16	882
Crop insurance for organically grown products	2.92	877
Organic-specific marketing orders	2.82	837
Organic export programs/market development	2.74	881
Liability insurance from GMO drift/contamination	2.72	858
Cost-share programs for transitioning land to organic	2.11	860

What information or services would have the greatest positive effect on the economic sustainability of your organic farming operation? (*Open-ended, write-in response.*)

·Q46·

Figure 5.1—Information or services that would have the greatest positive effect on the economic sustainability of respondents' organic farm operations, as summarized from write-in responses. (684 respondents, 920 responses tabulated.)



Other responses included: Local news reporting about farming & organic; Insurance-related concerns; Organic market advertising; GMO liability insurance and/or protection from contamination; Government support for organic; Lenders/bankers informed about organic; Markets for specific products; Production support: available, affordable and effective labor; Cost sharing programs for transitioning land to organic; Farm directories to market farm product; Grant writing & funding search assistance; Price increases, better prices; Property tax relief; Reputable buyers; Farmland protection programs; Inputs that are less expensive, affordable; Hands-on training in organic production; Cost share for inputs; Equipment appropriate to organic; Organic-specific marketing orders; NOP Rule enforcement; Import bans or tariffs; Market consolidation; Support for renewable energy systems

Fig. 5.1 summary

Information or services that would have the greatest positive effect on economic sustainability.

- **More than one quarter of respondents (26%, f=180) wrote in comments indicting that *consumer education programs* about organic food and farming are the most important services in support of their farm's economic sustainability.**
- **14% of respondents named *organic market access, development or expansion* as important.**

·Q47·

Do you currently have access to the Internet? *If so, is this access at your home or farm, or do you have convenient access elsewhere?* (*Select one response.*)

Table 5.3 summary

Respondents' access to Internet services.

- **78% of respondents indicated that they have Internet access, with 72% identifying that they have access at their home or farm.**
- **22% of respondents indicated that they *do not have* Intenet *access*.**

Table 5.3 Respondents' access to Internet services. (984 respondents.)

Internet access	f	%
I do not have access to the internet	213	**22%**
I have Internet access at my home and/or on the farm	708	**72%**
I have a convenient source for Internet access away from my home/the farm	63	**6%**
Total:	984	**100%**
Nonresponses = 50		

·Q48·

How often do you use the Internet for the following activities? (*Select one response per category.*)

Table 5.4 summary

Nature and frequency of farm-related Internet activities.

- **Respondents use the Internet most frequently to *check weather*, with 61% of respondents using the Internet for this purpose.**
- **50% of respondents use the Internet to *look for organic market information*;**
- **28% of respondents use the Internet to *sell their organic farm products*.**

Table 5.4 Nature and frequency of Internet use by respondents for farm-related activities. (906 respondents.)

	Frequency of Internet use					
Internet activity	Daily	Weekly	Monthly	Yearly	Never	f
Check weather	19%	18%	13%	11%	39%	906
Read or look for farming news	3%	11%	24%	22%	39%	889
Look for organic product information	2%	7%	24%	27%	41%	891
Communicate with other farmers	5%	10%	18%	21%	47%	901
Look for organic market information	1%	5%	16%	28%	50%	895
Purchase other farming inputs	0%	2%	7%	33%	58%	891
Check conventional market information	2%	4%	10%	16%	67%	886
Purchase seed	1%	1%	5%	25%	69%	894
Sell your organic farm product(s)	4%	4%	7%	13%	72%	885

What, if any, government programs has your farm participated in over the past five years, specific to your organic land and/or organic products? (*Select all that apply.*)

·Q49·

Table. 5.5 Respondent participation in various government programs over the past five years. (929 respondents.)

Government program	f	%
None	432	**47%**
FSA Farm Program/Commodity Payments	318	**34%**
Federal crop insurance	194	**21%**
Disaster payments	175	**19%**
Conservation Reserve Program (CRP)	122	**13%**
Environmental Quality Incentives Program (EQIP)	88	**9%**
Other (multiple categories)	52	**6%**
Wetlands Reserve Program (WRP)	25	**3%**
Wildlife Habitat Incentives Program (WHIP)	31	**3%**
Other - Sustainable Agriculture Research and Education (SARE)	9	**1%**
Other - Organic certification cost share	12	**1%**
Other - Dairy market loss assistance	2	**
multiple responses possible		
Nonresponses = 105		

Table 5.5 summary

Respondent participation in government programs over the past five years, specific to organic land or products.

- **47% of respondents indicated that they *did not participate* in any farm-related government programs, based on the list provided, over the past five years.**
- **Respondents identified *Farm Service Administration commodity payment programs* as the program they most frequently participate in, with 34% of respondents participating.**
- **21% participated in *federal crop insurance* programs.**
- **19% participated in *federal disaster payment* programs.**
- **Small percentages of respondents identified *certification cost share* and SARE as programs they've participated in.**

·Q50· What, if any, farm organizations are you a member of? (*Select all that apply.*)

Table 5.6 summary

Farm organization membership.

- **84% of respondents indicated that they belong to at least one farm organization or trade group.**
- **40% indicated that they belong to an *organic-specific association*.**
- **Almost as many, 38%, indicated that they belong to the *Farm Bureau*.**
- **8% identified themselves as members of the *Organic Trade Association*.**

Table. 5.6 Respondent membership in various farm-related organizations. (956 respondents.)

Farm organization	f	%
None	154	**16%**
Organic-specific growers association(s)	378	**40%**
Farm Bureau	359	**38%**
Marketing cooperative(s)	170	**18%**
Product-specific growers association(s)	98	**10%**
Organic Trade Association	74	**8%**
National Farmers Organization	62	**6%**
National Farmers Union	41	**4%**
Other	223	**23%**
Nonresponses = 78		

Marketing Orders and Organic

In 2001, what, if any, federal or state marketing orders did you participate in, specific to your organic products? (*Select all that apply.*)

·Q51·

Table 6.1 Respondents' participation in state and federal marketing order programs, specific to organic products. (990 respondents.)

Response category	f	%
None	905	91%
Federal marketing order	50	5%
State marketing order	35	4%
	990	100%
Nonresponses = 44		

Table 6.1 summary

Respondents' participation in state and federal marketing order programs, specific to organic products.

- **9% of respondents (f=85) indicated that they participate in marketing order programs.**
- **5% indicated participation in federal marketing order programs.**
- **4% indicated participation in state marketing order programs.**

Do you believe that as an organic producer, you receive benefits from a federal or state marketing order that is relatively equal to the benefits received by conventional producers of the same product(s)? (*Select one response.*)

·Q52a·

Table. 6.2a Respondent evaluation as to whether marketing order benefits are equal for organic producers. (187 respondents.)

Response category	f	%
Yes	84	45%
No	103	55%
Total:	187	100%
Nonresponses = 847		

Table 6.2a summary

Evaluation of whether marketing order benefits are equal for organic producers.

- **55% (f=103) of respondents participating in marketing order programs indicated that benefits to organic producers are not equal to the benefits received by conventional producers.**

·Q52b· **If your marketing order benefits are not equal, for which product(s) and for what reasons?** (*Write-in, open ended response.*)

Table 6.2b Listing of organic products and reasons why marketing order benefits are not equal for organic producers of those products.

Apples	*Apple assessments are used to produce pro-chemical propaganda; Increased production and no increase in promotion due to large volume of conventional production; Apple Commission only services conventional fruit; Most marketing efforts in part have been towards conventional markets but this is changing; Washington Apple Commission does not advertise organic apples, but we still pay $.25 per bin assessment; Organic not specifically advertised to consumers.*
Apricots, peaches, plums	*No advertising for organic; The level of acceptable cosmetic damage is set too high.*
Avocados	*Benefits are only for conventional sales; No organic.*
Corn	*No marketing or explanation of organic farming methods; Check-offs promote conventional agriculture as being the safest and most sustainable when they are not as safe or sustainable as organic; Pay for check-off but we can't use it.*
Cotton	*Antagonistic attitude toward organic - no organic research.*
Dates	*The marketing order benefits larger growers; a burden with few benefits for small farmers.*
Kiwifruit	*Promotion is generic, research is mostly conventionally-oriented; Our marketing order is a real can of worms. It would be best to be eliminated especially for organic; California kiwifruit marketing assn. does track and publish organic statistics*
Milk, dairy	*Nearly all organic milk farmers sell fluid milk and although the milk isn't mixed with conventional it is pooled on paper and the conventional farms benefit from it. This may be different in other parts of the country where more milk is utilized; As organic producers we don't receive any benefits from them; There is no advertising for organic milk; We pay all the deductions for promotion and advertising; administration; etc. that does not promote our organic product; Organic milk should be advertised; Organic producers should not need to pay for conventional advertising; No organic marking; Different product; No research; Does not recognize organics as being different from conventional commodity products; Money collected for advertising from our milk check isn't used for organic marketing*
Pears	*We NEVER get promotion, our market and standards are completely different; All we get is a produce report and what they are sold for at market retail price. Promotions of organic will kill conventional sales if done as health issues. Would be seen as counter productive; We are a small producer.*
Potatoes	*Doesn't tell the truth about any benefit from healthy potatoes; More of a size issue–as a small packer it costs me way more per carton to have them inspected than the large sheds. If I ship only one pallet; the cost is over $2.00 per carton; They expect our input and tonnage to be the same as conventional.*
Raisins	*We are given an organic bonus for 100% crop but have to sell on % set up for conventional raisins.*
Soybeans	*Quantity needs; Conventional beans worth $4.00/bu and mine contracted for $14.50/bu; Government agencies do not help organize organic farmers in marketing.*
Spring wheat and durum	*No state marketing*
Walnuts	*Good for general advertising but not organic; No organic products featured in advertising; Small acreage in comparison to conventional; No programs to aid my production or marketing; No distinction for organic walnuts*

Using one marketing order that you participate in as an example, how could this marketing order serve you best as an organic producer? (*Select all that apply.*)

·Q53·

Table. 6.3 Ways in which marketing orders could best serve organic producers. (131 respondents. More than one response per respondent is possible.)

Response category	f	%
Earmark funding for organic marketing	63	**48%**
Earmark funding for organic research	52	**40%**
Develop exemption for organic producers from marketing order	46	**35%**
Keep program as is	32	**24%**
Develop rebate of payment for organic producers	27	**21%**
Specify different quality, size or packaging standards for organic	15	**11%**
Specify different quantity controls for organic	13	**10%**
Develop exemption from quality, size or packaging standards for organic	12	**9%**
Develop exemption from quantity controls for organic	8	**6%**
Nonresponses = 903		

Table 6.3 summary

Ways in which marketing orders could best serve organic producers.

Top responses, in descending order of response frequency, were:

- **48% indicated that funding should be earmarked for organic marketing.**
- **40% indicated that funding should be earmarked for organic research.**
- **35% indicated that exemptions should be developed for organic producers.**

GMOs* and Organic

*GMO refers to genetically modified organisms.

·Q54· Based on what you know today about the use of GMOs in agriculture, what do you believe is the risk of exposure and possible contamination of your organic farm product(s) by GMOs? (*Select one response.*)

Table 7.1 summary

Perceived level of GMO exposure and contamination risk.

- **46% of respondents indicated that they believe the risk of contamination of their organic farm products by GMOs is *moderate*, *high* or *very high*.**

Table 7.1 Respondents' perceived risk of exposure and possible contamination of their organic farm product(s) by GMOs. (1,008 respondents.)

Perceived level of GMO contamination risk	f	%
Very High	180	18%
High	119	12%
Moderate	161	16%
Low	200	20%
Very Low	260	26%
Don't Know	88	8%
		100%
Nonresponses = 26		

·Q55· What sources, if any, do you feel present risks of GMO contamination to your organically grown products, and to what degree? (*Select one response per category.*)

Table 7.2 summary

Possible sources of GMO contamination, rated by perceived level of contamination risk.

- **Respondents indicated that they believe *contaminated seed stock* (rated by 48% as a moderate to high risk) presents the greatest GMO contamination risk, followed by GMO *pollen drift in the field* (rated by 42% as a moderate to high risk).**
- **These are followed by *contaminated farm inputs* (30% rated as moderate to high risk), *contamination at processor or in processing* (23% rated as moderate to high risk) and *contaminated equipment* (8% rated as moderate to high risk).**

Table 7.2 Possible sources of GMO contamination to organic farms, rated by perceived level of contamination risk.

Possible source of GMO contamination	High risk	Mod risk	Low risk	Little to no risk	f
GMO pollen drift in field	22%	20%	20%	38%	899
Contaminated equipment	3%	5%	21%	71%	789
Contaminated seed stock	23%	25%	22%	30%	870
Contaminated farm inputs	11%	19%	27%	43%	823
Contamination at processor/in processing	8%	15%	22%	55%	791

Which, if any, of the following measures have been carried out on (or on behalf of) your farm in response to your organic farm product(s) risk of exposure to GMO contamination? (*Select all that apply.*)

·Q56·

Table 7.3 Measures carried out by respondents in response to GMO contamination risks.
(922 respondents. More than one response per respondent is possible.)

Measures carried out in response to GMO contamination risk	f	%
No measures have been carried out specifically in response to GMO contamination risks	481	**52%**
Communicated with neighboring farmers about GMO risks to your farm	225	**24%**
Increased size of buffer zones to neighboring farms	177	**19%**
Discontinued use of certain inputs at risk for GMO contamination	165	**18%**
Adjusted timing of crop planting	142	**15%**
Altered cropping patterns or crops produced	122	**13%**
Changed cropping locations	87	**9%**
Other - Careful consideration of seed sources	17	**2%**
Changed processors or processing procedures	12	**1%**
Other - Saving & producing own seed	5	**1%**
Other - Buy certified organic, quality or clean seed	6	**1%**

Other responses included: Signs; Requested "GMO-Free" statements from suppliers; Don't use manure from cows fed high amounts of grain for composting; Alert Farm Bureau members about the 1,800 farmers being sued in US by Monsanto; Find and verify GMO-free legume inoculant; I may concentrate on crops that are asexually produced; Field windbreak as a barrier; Changed suppliers; Bought our own combine and not using custom; Careful consideration goes into which seed companies I do business with; Discontinued growing corn and soybeans, increased reliance on other grain crops; Possible contamination from neighbor's corn, so quit growing corn.

Table 7.3 summary

Measures carried out in response to GMO contamination risks.

- **48% of respondents indicated that they have taken some measures to prevent GMO contamination of their organic farm products.**
- **The greatest percentage (24%) indicated that they have *communicated with neighboring farmers*.**

Additionally, a significant percentage of respondents have taken measures that represent potential economic impacts to their operation, including:

- **19% have *increased buffer zone size*.**
- **15% have *adjusted timing of planting crops*.**
- **9% have *changed cropping locations*.**

What entities, if any, have requested or required that any of your farm's seed, inputs, or products be tested for GMOs? (*Select all that apply.*)

·Q57·

Table 7.4 Entities requesting or requiring tests of seed, inputs or organic farm products for GMOs.
(969 respondents. More than one response per respondent is possible.)

Entity requesting/requiring GMO testing	f	%
None	713	**73%**
Organic certifier	184	**19%**
Product buyer	126	**13%**
Other—self	2	**<1%**
Other—seed supplier	3	**<1%**
Nonresponses = 69		

Table 7.4 summary

Entities requesting or requiring GMO testing.

- **27% of respondents indicated that some entity has requested testing of some portion of their organic farm's seed, inputs or products.**
- **In most cases (19% of responses), the *organic certifier* requested GMO testing.**
- **Among 13% of respondents, *product buyers* requested GMO testing.**

·Q58· Have any of your farm's seed, other inputs or organic farm products been tested for GMOs? (*Select one response, and fill in which items were tested for* GMO *contamination.*)

Table 7.5 summary

Responses to whether respondents' seed, other inputs or organic farm products have been tested for GMOs.

- **17% of respondents (f=163) indicated that GMO testing had occurred on *seed*, *other farm inputs*, or their *organic farm products*.**
- **13% (f=127) indicated that GMO testing occurred on *seed*: corn (f=31); soybeans (f=21); wheat (f=2); alfalfa (f=2); clover, oats, potatoes, barley and spelt (f=1 each).**
- **2% (f=18) indicated that GMO testing has occurred on other *farm inputs*: inoculants, manure, livestock feed, vitamin E oil, bacteria (f=1 each).**
- **5% (f=47) indicated that GMO testing has occurred on their *organic farm products*: soybean (f=13); corn (f=8); milk, walnuts (f=1 each).**

Table 7.5 Responses to whether organic farmers' seed, other inputs or organic farm products have been tested for GMOs. (979 respondents.)

Response category	%	f
Yes	**17%**	163
No	**83%**	814
Total	**100%**	977
Nonresponses = 57		

·Q59· Did any of these seed, input, or organic products test positive for GMOs? (*Select one response.*)

Table 7.6 summary

Results of tests for GMO contamination.

- **2% of all respondents (f=18) indicated receiving a *positive test result for* GMO *contamination* on some portion of their organic seed, inputs or farm products.**

Table 7.6 Results of tests for GMO contamination among organic farm seed, inputs or products tested. (233 respondents.)

Response category	f	%
Yes (tested positive for GMOs)	18	**11%**
No (tested negative for GMOs)	141	**89%**
Total	159	**100%**

Has your organic farm operation borne any direct costs or damages related to the presence of GMOs in agriculture? (*Select all that apply.*)

·Q60·

Table 7.7 Direct costs or damages to organic farmers related to GMOs in agriculture. (938 respondents).

Costs to organic farmers related to GMOs in agriculture	f	%
No direct costs related to GMOs have been incurred	863	92%
Payment for testing seed, inputs, or your organic farm products for GMO contamination	41	4%
Loss of organic sales/market due to perceived or actual contamination risk	19	2%
Loss of sales due to presence of GMOs in organic product	10	1%
Loss of organic certification due to presence of GMOs in organic products	6	1%
Other	18	2%
Nonresponses = 96		

Other stated costs included: More time required in planning; Loss of productive land for larger buffers; Mental anguish/sadness for the Earth; We have to be vigilant in buying seed; Higher cost of purchasing GMO-free, tested seed; Limited crop choice due to drift from neighbor: Do not buy conventional soybeans for cover crop; More time spent in finding seeds; Cost of not being able to plant corn when neighbors do; Cost of legal advice.

Table 7.7 summary

Direct costs or damages to organic farmers related to GMOs in agriculture.

- **92% of respondents reported incurring no direct economic costs of GMOs.**
- **8% of respondents indicated incurring some direct economic costs of GMOs.**
- **4% indicated bearing the cost of GMO testing.**
- **2% indicated bearing the cost of lost sales due to perceived or actual contamination.**

Do you feel that a regulatory framework is in place to adequately protect your organic farm product(s) from damages due to possible contamination by GMOs? (*Select one response.*)

·Q61·

Table 7.8 Respondents' opinions regarding whether a regulatory framework is in place to protect their products from possible GMO damages. (990 respondents.)

Response category	f	%
No	542	55%
Yes	97	10%
Don't Know	351	35%
Total	990	100%
Nonresponses= 44		

Table 7.8 summary

Respondent opinions regarding whether the regulatory system protects their organic products from possible GMO damages.

- **55% of respondents (f=542) indicated *no*.**
- **35% of respondents (f=351) said they *don't know*.**
- **10% said *yes*.**

·Q62· Would you like to add anything about your experiences or concerns regarding GMOs? (*Open-ended, write in response.*)

Table 7.9 Respondents' additional comments regarding GMOs. (340 respondents.) A few examples of these comments are provided below. A complete listing of responses is available on OFRF's website at *www.ofrf.org/publications/survey/4th NOFS/Q62GMOcomments.pdf*

Additional comments regarding GMOs
The organic industry and my own organic farm were here long before GMO's. We should not have to take all the necessary measures to prevent GMO contamination or bear the loss if contamination occurs. The GMO producer and/or farmer should be liable.
The forces pushing GMOs are "big business" and laissez-faire government; i.e. they're here to stay.
Think risk to my farm production is very low but don't know.
Question 61 says it all: a regulatory framework is not adequately in place to protect organic farms from GMO contamination.
Pollen drift should be responsibility of GMO user to control.
No other concern even remotely compares to the apprehension I experience when I imagine ourselves 10 years from now contemplating what GMOs have done to us.
My greatest concern is that the public is not aware enough about the dangers of GMOs.
Labeling of products containing GMOs MUST happen soon - all we ask is the ability to make informed choices.
It appears to me that there is a steady increase in seed that contains GMO content.
I'm very concerned--they are tinkering with something that they have no idea what the long term effects will be.
I'm concerned about raising organic corn as many neighbors raise conventional GMO corn.
I think we need legislation holding contaminators liable for GMO contamination. As it appears now, GMO producers are free to do what they want and organic and non-GMO producers have no legal recourse for damages.
I feel farmers who purchase GMO seed should pay a fee [ie 5 cents/bu]. This money should be put into a slush fund to reimburse losses proven to be caused by GMO contaminations.
Chemical companies must be held accountable for contamination by GMOs.
Drift is a huge concern to us -as our dairy farm neighbor plants his corn next to our crop–I am not saving my own seed in fear of Monsanto taking our farm away.
Deer can run from field to fields; scattering spores; also contamination in cleaning and freight. Re: soybeans.
GMO products should be labeled.
Difficulty with getting some cover crop seeds [oil seed radishes] because of GMO contamination.

More about you and your farm

What best describes your relationship to this organic farm? (*Select one response.*)

·Q63·

Table 8.1 Farm tenureship. (1,015 respondents.)

Farm tenureship	f	%
Owner/Co-Owner	958	**94%**
Hired Manager/Caretaker	43	**5%**
Other	14	**1%**
Total	1,015	**100%**
Nonresponses = 19		

Table 8.1 summary

Farm tenureship.

- **94% of respondents are *owners* or *co-owners* of their organic farm.**
- **A small percentage of respondents, 5%, are *managers* or *caretakers*.**

·Q64· How many years have you been farming? (*Fill in response.*)

Table 8.2a summary

Number of years farming.

- **30% of respondents have been farming for 10 years or less.**
- **25% of respondents have been farming between 11 and 20 years.**
- **45% of respondents have been farming 21 years or more.**

Table 8.2b summary

Years farming; 2001 survey data compared with OFRF survey data for previous years.

- **For the years 1993 to 1997, the percentage of respondents farming five years or less ranged from 19% to 22%, while in 2001 the percentage of respondents farming five years or less was only 12%.**
- **In 2001, a greater percentage of respondents had farmed more than 20 years, with respondents in this category rising to 45% in 2001, from 22% in 1993.**
- **The average number of years farming by OFRF survey respondents has increased over eight years, from 16 years in 1993, to 20 years in 2001.**

Table 8.2a Number of years farming. (1,008 respondents.)

Number of years farming	f	%
1-5 years	122	12%
6-10 years	186	18%
11-15 years	136	14%
16-20 years	111	11%
21-30 years	278	28%
31-40 years	99	10%
41-50 years	53	5%
>50 years	23	2%
Totals	1,008	100%
Nonresponses = 26		

Table 8.2b Years farming; 2001 data compared with 1997, 1995 and 1993 OFRF survey data.

Number of years farming	4th OFRF survey (2001) f=1,008	3rd OFRF survey (1997) f=1,167	2nd OFRF survey (1995) f=935	1st OFRF survey (1993) f=542
1-5 years	12%	19%	22%	21%
6-10 years	18%	21%	22%	21%
11-15 years	14%	12%	15%	18%
16-20 years	11%	17%	16%	18%
21-30 years	28%	21%	16%	11%
31-40 years	10%	6%	5%	4%
41-50 years	5%	3%	3%	5%
>50 years	2%	1%	1%	2%
Totals	100%	100%	100%	100%
Average of yrs	20.4	16.7	16.2	16.1

How many years have you been farming organically? (*Fill in response.*)

·Q65·

Table 8.3a Years farming organically. (1,015 respondents.)

Number of years farming organically	f	%
1-5 years	298	29%
6-10 years	314	31%
11-15 years	173	17%
16-20 years	87	9%
21-30 years	105	10%
31-40 years	21	2%
41-50 years	9	1%
>50 years	4	<1%
Totals	1,015	100%
Nonresponses = 19		

Table 8.3b Years farming organically as of 2001, compared with 1997, 1995 and 1993 OFRF survey data.

Number of years farming organically	4th OFRF survey (2001) f=1,015	3rd OFRF survey (1997) f=1,176	2nd OFRF survey (1995) f=935	1st OFRF survey (1993) f=542
1-5 years	29%	36%	39%	36%
6-10 years	31%	29%	31%	29%
11-15 years	17%	13%	12%	16%
16-20 years	9%	12%	10%	11%
21-30 years	10%	8%	6%	5%
31-40 years	2%	1%	1%	1%
41-50 years	1%	<1%	<1%	1%
>50 years	<1%	<1%	<1%	1%
Totals	100%	100%	100%	100%
Average of yrs	11.5	10.2	9.2	10.2

Table 8.3a summary

Years farming organically.

- **60% of respondents have been farming organically for 10 years or less.**
- **26% of respondents have been farming organically for between 11 and 20 years.**
- **13% of respondents have been farming organically for 21 years or more.**

Table 8.3b summary

Years farming organically; 2001 survey data compared with data from OFRF's previous surveys.

- **The average number of years farming organically has risen from 10.2 years in 1993 to 11.5 years in 2001.**
- **The percentage of respondents farming organically more than 20 years, has risen from 8% in 1993 to 14% in 2001.**

·Q66· How many years has your farm been certified organic? (*Fill-in response.*)

Table 8.4a summary

Number of years respondents' farms have been certified organic.

- **79% of respondents' farms have been certified organic for 10 years or less.**
- **17% of respondents' farms have been certified organic for between 11 and 20 years.**
- **2% of respondents' farms have been certified organic for more than 20 years.**

Table 8.4b summary

Number of years respondents' farms have been certified organic; comparison with data from OFRF's previous surveys.

- **There has been an increase in the average number of years respondents' farms have been certified organic, rising from 4.7 years in 1995, to 6.9 years in 2001.**
- **A smaller percentage of respondents' farms were certified organic for 2 years or less in 2001 than in 1995, falling from 32% in this category to 15%.**
- **A greater percentage of respondents' farms have been certified organic for more than 10 years, with this figure rising from 7% in 1995 to 19% in 2001.**

Table 8.4a Number of years respondents' farms have been certified organic. (1,009 respondents.)

Number of years certified organic	f	%
in transition	4	<1%
<1 year	1	<1%
1-2 years	132	13%
3-5 years	397	39%
6-10 years	275	27%
11-15 years	143	14%
16-20 years	35	3%
>20	22	2%
	1,009	100%
Nonresponses = 25		

Table 8.4b Number of years respondents' farms have been certified organic; 2001 data compared with 1997 and 1995 OFRF survey data.

Number of years certified organic	4th OFRF survey (2001) f=1,009	3rd OFRF survey (1997) f=1,155	2nd OFRF survey (1995) f=928
In transition to certified organic	<1%	1%	**
<1 year	<1%	<1%	<1%
1-2 years	13%	26%	30%
3-5 years	39%	34%	36%
6-10 years	27%	29%	26%
11-15 years	14%	6%	5%
16-20 years	3%	2%	1%
>20	2%	<1%	<1%
Totals	100%	100%	100%
Average yrs	6.9	5.4	4.7

Why do you choose to farm organically? *Using a scale of 1 (not important) to 5 (very important), please indicate how important the following possible reasons are for you, personally.*

·Q67·

Table 8.5 Ranking of respondents' reasons for farming organically. (1,003 respondents.)

Reasons	f	Average ranking
Land stewardship, ecological sustainability	998	4.60
Chemical avoidance for family/farmworker health	990	4.60
Chemical avoidance for environmental health	1,003	4.58
Organic represents good farming practices--like the results	1,000	4.56
Ecological principles--view farm as ecological system	987	4.39
Quality of organically grown products	998	4.38
Community values, tradition, quality of life	976	4.13
Philosophical, spiritual or ethical reasons	989	4.12
Challenging, interesting, intellectually appealing	978	4.05
To maintain economic sustainability of farm	979	3.86
Organic price premiums--more money for product	997	3.58
Growing consumer demand for organic--to tap into market	981	3.48
Provides economic support on fewer acres than conventional	931	3.02
To reduce input costs	965	2.79
To change practices in response to farm chemical regulation	941	2.50
Customer or buyer required it	915	2.20
Owner of land required it	891	1.74
Nonresponses = 31		

Space was provided for additional write-in responses, and these included: Better for our world; Consumer health; Consumers deserve a choice of the food they eat; I cannot poison my mother Earth; I eat what I produce!; I like the smell of good dirt; I want to know what I am eating and what my livestock is eating; It feels right; It is the future; It is the right thing to do; It promotes family farms; It's the right way to farm; Pride; Prove to chemical industry they are on the way out; Reduce dependencies on large corporations; Responsibility to build in future productivity; Self pride and gratification; Support others in organic 'chain'; The way mother nature meant it to be done; This is the only way to grow!; To produce food that's safe to eat; To prove it can be done; To use less water; Conventional farming system is bankrupt; Chemical/seed company activity is criminal; Once worked in research on pesticides!; Working with nature and for the good and health of fellow man; Your health is your wealth.

Table 8.5 summary

Why respondents choose to farm organically, ranking of reasons.

Out of 17 the categories provided, respondents identified their most important reasons for farming organically as:

- ***Land stewardship, ecological sustainability*;**
- ***Chemical avoidance for family & farmworker health*;**
- ***Chemical avoidance for environmental health*;**
- ***Organic represents good farming practices--like the results*; and**
- ***Ecological principles—view farm as ecological system*.**

•Q68• In which of the following ways did you begin farming organically? (*Select one response.*)

Summary of Tables 8.6a and 8.6b

Percentage of respondents that transitioned from conventional farming.

- **As of 2001, the percentage of respondents that had *transitioned from conventional farming practices* was 51%; compared with 41% in 1997, and 42% in 1995.**

Table 8.6a Percentage of respondents that "transitioned" from conventional farming, or began farming organically as their first method (1,012 respondents).

How did you begin farming...	f	%
Transitioned from conventional farming methods	515	**51%**
Did not transition: began farming using organic practices	497	**49%**
Total	1,012	**100%**
Nonresponses = 22		

Table 8.6b Percentage of respondents that "transitioned" from conventional farming, or began farming organically as their first method (1,012 respondents), and comparison with OFRF survey data from 1997 and 1995.

How did you begin farming...	4th OFRF survey (2001) f=1,012	3rd OFRF survey (1997) f=1,161	2nd OFRF survey (1995) f=907
Transitioned from conventional farming methods	**51%**	**41%**	**42%**
Did not transition: began farming using organic practices	**49%**	**59%**	**58%**
Total	**100%**	**100%**	**100%**

•Q69• Do you farm full time or part time? (*Select one response.*)

Table 8.7 summary

Percentage of respondents farming full and part time.

- **67% of respondents indicated that they are farming *full time*, compared with 62% in 1997.**

Table 8.7 Respondents farming full time and part time (1,020 respondents), and comparison with OFRF survey data for 1997.

Response category	f	%	3rd OFRF survey (1997) f=1,173
Full time	681	**67%**	**62%**
Part time	339	**33%**	**38%**
Total	1,020	**100%**	**100%**
Nonresponses = 14			

Including yourself and any farm family/household members, how many people were employed in your farm's organic operation, full-time, part-time and/or seasonally in 2001? (*Fill in response.*)

·Q70·

Table. 8.8a Full-time, part-time and seasonal employees, arranged by farm-family members (FF) and non-family employees (NF). (996 respondents.)

Response category	f	Total employees in this category	Average	Median
FF Full-time, year round	636	1,155	2	1
FF Full-time, seasonally	180	360	2	1
FF Part-time, year round	313	515	2	1
FF Part-time, seasonally	240	578	2	2
Total farm family/household employees		2,608		
NF Full-time, year round	170	170	6	2
NF Full-time, seasonally	185	2,707	15	3
NF Part-time, year round	115	115	3	1
NF Part-time, seasonally	358	2,385	7	3
Total non-family employees		5,377		
Total employees		**7,985**		

Table 8.8b Percentage of total employees that are farm family members, by category. (996 respondents.)

Response category	Total employees, farm family and non-family	% farm family
Full-time, year round, total	1,325	**87%**
Full-time, seasonal, total	3,067	**12%**
Part-time, year round, total	630	**82%**
Part-time, seasonal, total	2,963	**20%**

Table 8.8c Percentage of responses by employee categories and employee number ranges. (996 respondents.)

			For all respondents (f=996), the percentage indicating the number of employees in each of the following categories:					
Response category	Respondents with no employees in this category	Respondents with some employees in this category	1 employee	2 employees	3-5 employees	6-10 employees	11-20 employees	>20 employees
Full-time, year round	**32%**	**68%**	**29%**	**20%**	**12%**	**4%**	**2%**	**1%**
Full-time, seasonal	**69%**	**31%**	**9%**	**8%**	**6%**	**4%**	**2%**	**2%**
Part-time, year round	**61%**	**39%**	**19%**	**12%**	**6%**	**1%**	**<1%**	**0%**
Part-time, seasonal	**50%**	**50%**	**12%**	**11%**	**15%**	**6%**	**4%**	**2%**

Summary of Tables 8.8a-8.8c

Full-time, part-time and seasonal employees.

- **A total of 7,985 employees were tabulated (Table 8.8a), with 33% (2,608) being farm family employees.**
- **64% of respondents (f=636) indicated having at least one full-time, year-round family employee, with an average of 2 employees in this category for these respondents.**
- **19% of respondents (f=170) indicated employing full-time non-family employees year-round, with an average of 6 employees in this category for these respondents.**
- **Of 1,325 year-round employees tabulated from responses (Table 8.8b), 87% were farm family employees.**

·Q71· **Do you work off-farm and if so, for what reasons?** (*Select all that apply.*)

Table 8.9 summary

Off-farm employment and reasons, if employed off-farm.

- **48% of respondents indicated that they have *no off-farm employment*.**

(A comparative figure from the 1997 USDA Census of Agriculture shows that the percentage of all U.S. farm operators that worked zero days off the farm was 40%.)

For those survey respondents who did work off the farm, their top reasons for doing so, in descending order of response frequency, were:

- **As *a secondary income source* (22%).**
- **As *a primary income source* (21%).**
- **To *subsidize farm & capital investments* (20%).**

Table 8.9 Off-farm employment and reasons, if employed off-farm. (987 respondents.)

Response category	f	%
No off-farm employment	472	**48%**
As a secondary income source	217	**22%**
As a primary income source	206	**21%**
To subsidize farm & capital investments	198	**20%**
For health insurance or other benefits	125	**13%**
For personal interest	133	**13%**
As primary career	95	**10%**
Other	33	**3%**
Retired	17	**2%**
Nonresponses = 47		

What percentage of your net household income came from organic farm production in 2001? (*Select one response.*)

·Q72·

Table 8.10a Respondents' net percentage of household income from organic farm production (992 respondents).

Percentage of household income	f	%
1-25%	454	46%
26-50%	193	19%
51-75%	134	14%
76-100%	211	21%
Total	992	100%
Nonresponses = 42		

Table 8.10b Respondents' net percentage of household income from organic farm production (992 respondents), compared with OFRF survey data from 1997, 1995 and 1993.

Percentage of household income	4th OFRF survey (2001) f=992	3rd OFRF survey (1997) f=1,143	2nd OFRF survey (1995) f=880	1st OFRF survey (1993) f=527
1-25%	46%	50%	53%	44%
26-50%	19%	18%	16%	15%
51-75%	14%	12%	12%	15%
76-100%	21%	20%	19%	26%
Total	100%	100%	100%	100%

Table 8.10a summary

Percentage of household income that came from organic farming.

- **In 2001, 65% of respondents received 50% or less of their household income from from organic farming.**

Table 8.10b summary

Percentage of household income that came from organic farming; 2001 data compared with survey data from previous years.

- **In 1993, 41% of respondents received more than 50% of their household income from organic farming.**
- **In 2001, 35% of respondents received more than 50% of their household income from organic farming.**

·Q73· What was your farm's gross organic farming income in 2001? (*Select one response.*)

Table 8.11a summary

Gross organic farming income.

- **57% of respondents grossed $29,000 or less from their organic farm operation.**
- **43% of organic farms grossed $30,000 or more.**

Table 8.11b summary

Gross organic farming income; 2001 data compared with survey data from previous years.

- **In 1995, the percentage of respondents grossing $30,000 or more was 31%, rising to 35% in 1997, and 43% in 2001. (1993 data were not tabulated in the same manner and are not compared.)**

Table 8.11a Gross organic farming income in 2001. (989 respondents.)

Income range	f	%
No income or loss	48	5%
Less than $5,000	180	18%
$5,000 to $14,999	188	19%
$15,000 to $29,999	149	15%
$30,000 to $49,999	113	11%
$50,000 to $99,999	127	13%
$100,000 to $249,000	114	12%
$250,000 to $499,999	40	4%
$500,000 to $999,999	15	2%
$1 million to $4.9 million	12	1%
$5 million to $19.9 million	3	<1%
$20 million or more	0	0%
Total	989	100%
Nonresponses = 45		

Table 8.11b Gross organic farming income, 2001 data compared with 1997, 1995 and 1993 OFRF survey data.

Income range	4th OFRF survey (2001) f=989	3rd OFRF survey (1997) f=1,149	2nd OFRF survey (1995) f=879	1st OFRF survey (1993) f=517
No income or loss	5%	7%	<1%	**
Less than $5,000	18%	21%	29%	28%
$5,000 to $14,999	19%	22%	25%	19%
$15,000 to $29,999	15%	15%	14%	15%
$30,000 to $49,999	11%	11%	9%	9%
$50,000 to $99,999	13%	10%	11%	10%
$100,000 to $249,000	12%	8%	7%	11%
$250,000 to $499,999	4%	3%	3%	3%
$500,000 to $999,999	2%	1%	1%	1%
$1 million to $4.9 million	1%	2%	<1%	2%
$5 million to $19.9 million	<1%	<1%	<1%	<1%
$20 million or more	0%	<1%	**	**
Total	100%	100%	100%	100%
** category not included in study				

What is your highest level of formal education? (*Select one response.*)

·Q74·

Table 8.12a Respondents' highest level of formal education. (1,004 respondents.)

Level of education	f	%
No formal education	32	3%
Some high school	21	2%
Completed high school	138	14%
Some college	189	19%
Completed junior college/trade school	95	9%
Completed bachelor's degree	264	26%
Some graduate work	77	8%
Graduate degree	188	19%
Total	1,004	100%
Nonresponses = 30		

Table 8.12b. Respondents' highest level of formal education, compared with OFRF survey data for 1997, 1995 and 1993.

Level of education	4th OFRF survey (2001) f=1,004	3rd OFRF survey (1997) f=1,175	2nd OFRF survey (1995) f=937	1st OFRF survey (1993) f=530
No formal education	3%	2%	<1%	<1%
Some high school	2%	3%	2%	2%
Completed high school	14%	12%	12%	28%
Some college	19%	26%	26%	**
Completed junior college/trade school	9%	**	**	**
Completed bachelor's degree ("completed college")	26%	**	**	**
Completed college	**	33%	34%	41%
Some graduate work	8%	6%	7%	8%
Graduate degree	19%	18%	19%	21%
Total	100%	100%	100%	100%

Summary of Tables 8.12a and 8.12b

Highest level of formal education.

- **81% of respondents indicated receiving some level of college training.**
- **More than one quarter hold bachelors degrees.**
- **One fifth hold graduate degrees.**
- **These demographic figures have remained relatively constant over the course of four OFRF national surveys (Table 8.12b).**

·Q75· **What is your age?** (*Fill in response.*)

Summary of Tables 8.13a and 8.13b

Respondents' age.

- **The average age of respondents is 51 years.**
- **The age of OFRF survey respondents has increased steadily since 1993.**
- **The largest increase is in the 51-60 years of age range, from 15% in 1993 to 33% in 2001.**
- **The largest decrease is in the 31 to 40 years of age range, from 34% in 1993 to 13% in 2001.**

Table 8.13a Age of respondents. (1,005 respondents.)

Age	f	%
<= 20 years of age	2	**<1%**
21 to 30 years of age	32	**4%**
31 to 40 years of age	129	**13%**
41 to 50 years of age	338	**34%**
51 to 60 years of age	334	**33%**
61 to 70 years of age	125	**12%**
> 70 years of age	45	**4%**
	1,005	**100%**
Nonresponses = 29		
Average age	51	

Table 8.13b Age of respondents, comparison with 1997, 1995 and 1993 OFRF survey data.

Age	4th OFRF survey (2001) f=1,005	3rd OFRF survey (1997) f=1,176	2nd OFRF survey (1995) f=931	4th OFRF survey (1993) f=526
<= 20 years of age	**<1%**	**<1%**	**<1%**	**None**
21 to 30 years of age	**4%**	**5%**	**3%**	**3%**
31 to 40 years of age	**13%**	**20%**	**27%**	**34%**
41 to 50 years of age	**34%**	**40%**	**40%**	**36%**
51 to 60 years of age	**33%**	**23%**	**18%**	**15%**
61 to 70 years of age	**12%**	**9%**	**8%**	**10%**
> 70 years of age	**4%**	**3%**	**3%**	**2%**
	100%	**100%**	**100%**	**100%**
Average age	51	47.5	46.5	45.5

Your gender. (*Select one response.*)

·Q76·

Table. 8.14a Respondents' gender. (1,009 respondents.)

Gender	f	%
Female	221	**22%**
Male	788	**78%**
Totals	1,009	**100%**
Nonresponses = 29		

Table. 8.14b. Respondents' gender, responses compared with 1997, 1995 and 1993 OFRF survey data.

Gender	4th OFRF survey (2001) f=1,009	3rd OFRF survey (1997) f=1,171	2nd OFRF survey (1995) f=928	1st OFRF survey (1993) f=532
Female	**22%**	**21%**	**21%**	**24%**
Male	**78%**	**77%**	**79%**	**76%**
Couples or partners	**	**2%**	**	**
Totals	**100%**	**100%**	**100%**	**100%**

Summary of Tables 8.14a and 8.14b

Respondents' gender.

- **22% of OFRF survey respondents are women.**
- **The ratio of male to female respondents has remained consistent over the course of OFRF's four national surveys.**