ORGANIC FARMING RESEARCH FOUNDATION

4th National Organic Farmers' Survey:

Sustaining Organic Farms in a Changing Organic Marketplace

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Methods

- **Survey population developed by obtaining producer mailing lists from organic certification agencies.**
- **22-page survey mailed in April 2002 to certified organic farmers throughout the U.S.**
- **1,034 “completes” returned, a response rate of 16%**

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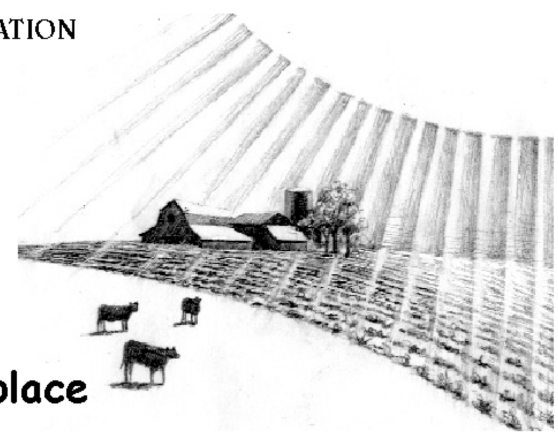

OFRF's
Fourth National
Organic Farmers' Survey:

Sustaining Organic Farms in a Changing Organic Marketplace

WHO SHOULD COMPLETE THIS SURVEY?

This survey should be completed by the person most responsible for your farm's organic <u>marketing</u> decisions.

WHAT DOES THIS SURVEY ASK ABOUT?

In general, this survey asks about your organic farm's activity and your experience in the organic marketplace in 2001. The survey is divided into the following sections:

Section 1: Farm profile
Section 2: Production and product details
Section 3: Marketing your organic products
Section 4: Organic market conditions, 2001
Section 5: Information and services
Section 6: Marketing orders and organic
Section 7: GMOs and organic
Section 8: More about you (and your farm)

For <u>most</u> respondents, the survey may be completed within 45 to 90 minutes.

All information collected in this survey will remain completely confidential. Your participation in this study is voluntary.

Please complete and return by May 31, 2002 to: OFRF, P.O. Box 440, Santa Cruz, California 95061.
A postage-paid envelope is provided for your convenience.

If you have questions about this survey, call 831-426-6606, or email survey@ofrf.org.

Respondent No. ____________

Respondent demographics

- **67% are full-time farmers**
  - up from 62% in 1997
- **51% transitioned from conventional farming**
  - up from 41% (1997) and 42% (1995)
- **36% have mixed operations**
  - up from 24% (1997) and 20% (1995)

Respondent demographics

- **Acres farmed, average = 277**
  - up from 233 in 1997
- **Acres farmed organically, average = 184**
  - up from 140 in 1997
- **22% of respondents are women**
  - percentage holding steady for OFRF survey respondents since 1993

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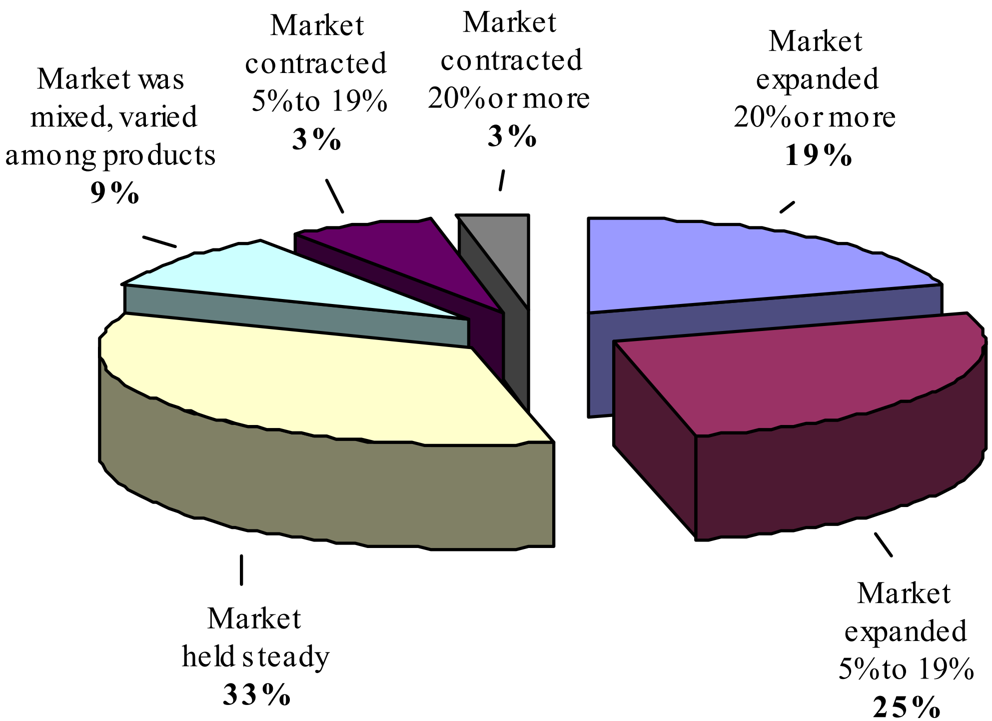
Organic Market Conditions, 2001

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

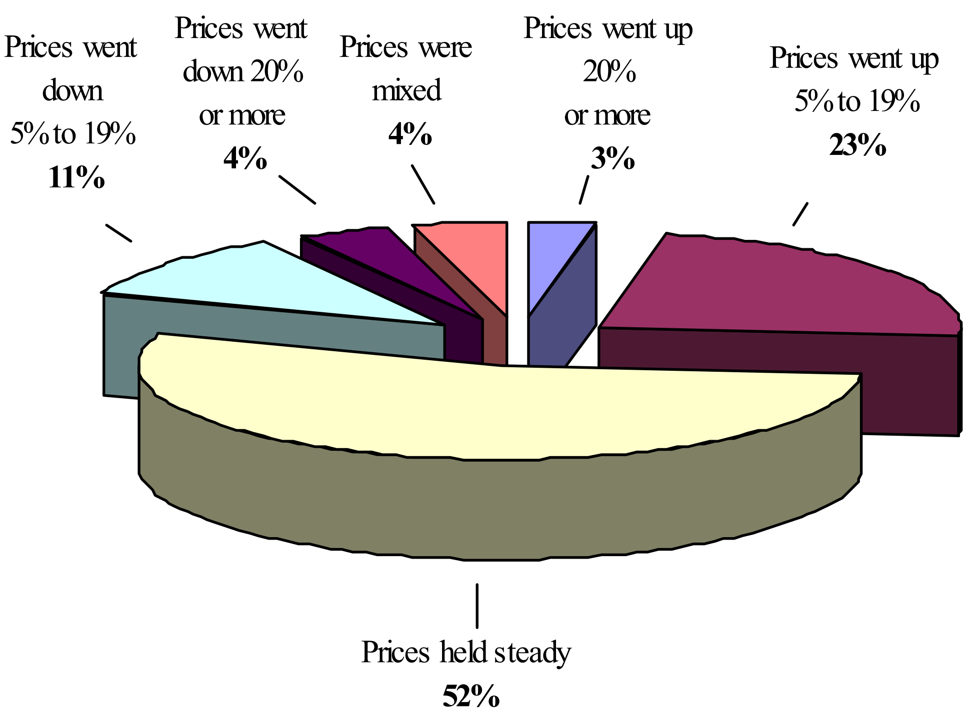
Figure 4.2–Rate of organic market expansion or contraction for organic farmers in 2001. 974 respondents.



- 44% reported market expansion
- 19% reported expansion or 20% or more
- Market held steady for 33%
- Market contracted for 6%

Q. This past year, did average prices for your organic farm products go up, down or hold steady compared to recent years?

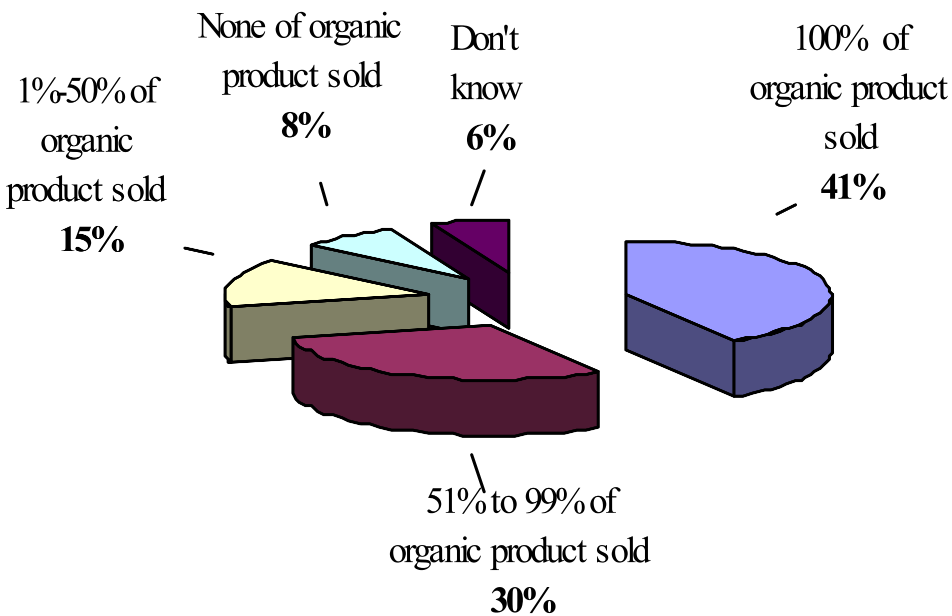
Figure 4.3–Trends in average prices for organic farm products in 2001. 992 respondents.



- 52% of respondents indicated that organic prices held steady in 2001
- 26% indicated that prices went up
- 15% said prices went down

Q.What volume percentage of your organically grown product(s) were you able to sell at an organic price premium in 2001?

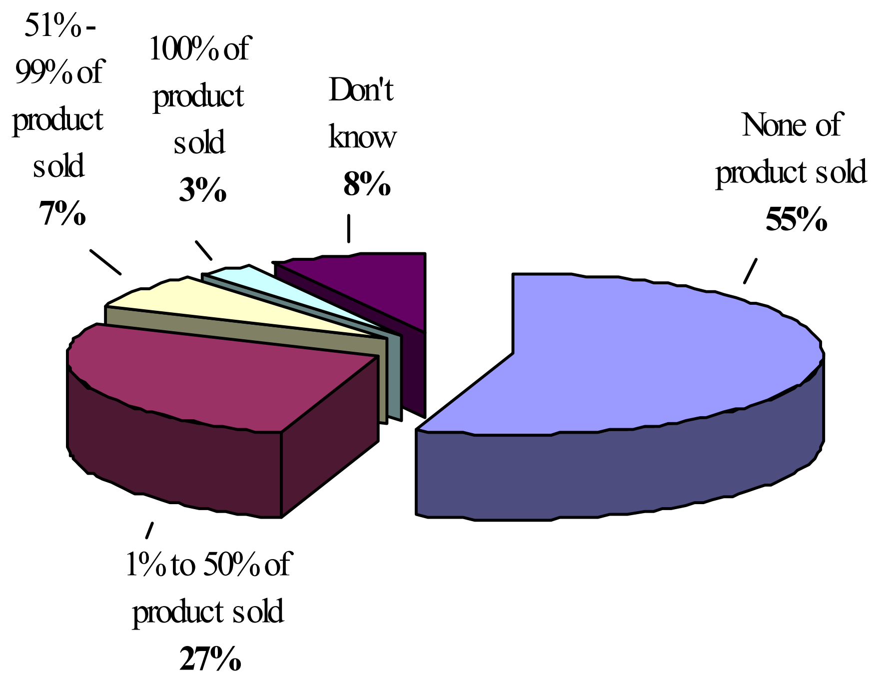
Figure 4.4–Percentage of organic product sold at organic price premiums in 2001. 996 respondents.



- 92% were able to obtain organic price premiums
- 41% obtained organic premiums on 100% of their organic product
- Another 30% obtained premiums on at least half of their organic product

Q. How much, if any, of your organically grown product was sold into the conventional market in 2001?

Figure 4.5–Percentage of organically grown product sold into the conventional market in 2001. 981 respondents.



- 55% of respondents sold no organic product into the conventional market
- 37% sold some portion of their organic product into the conventional market

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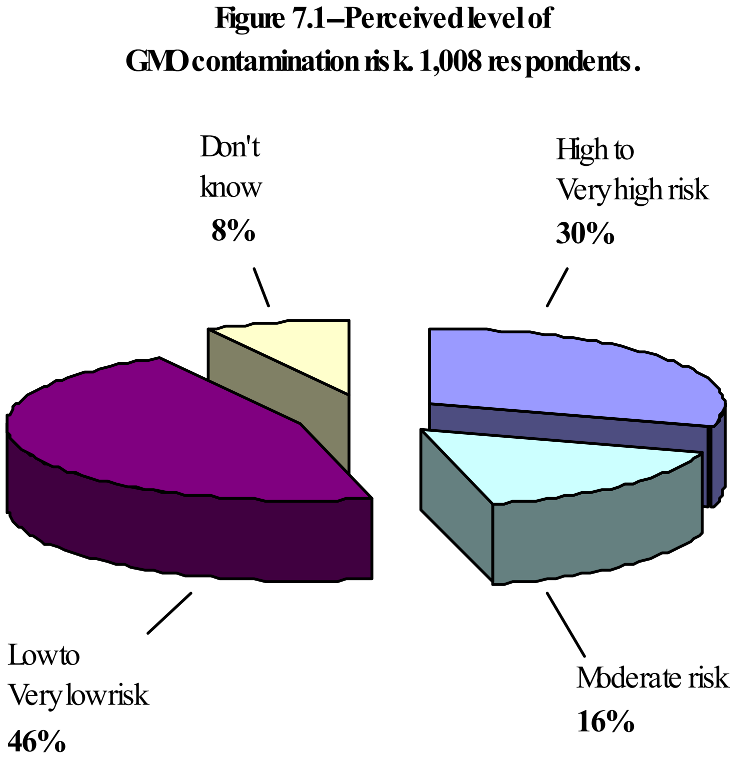
GMOs and Organic

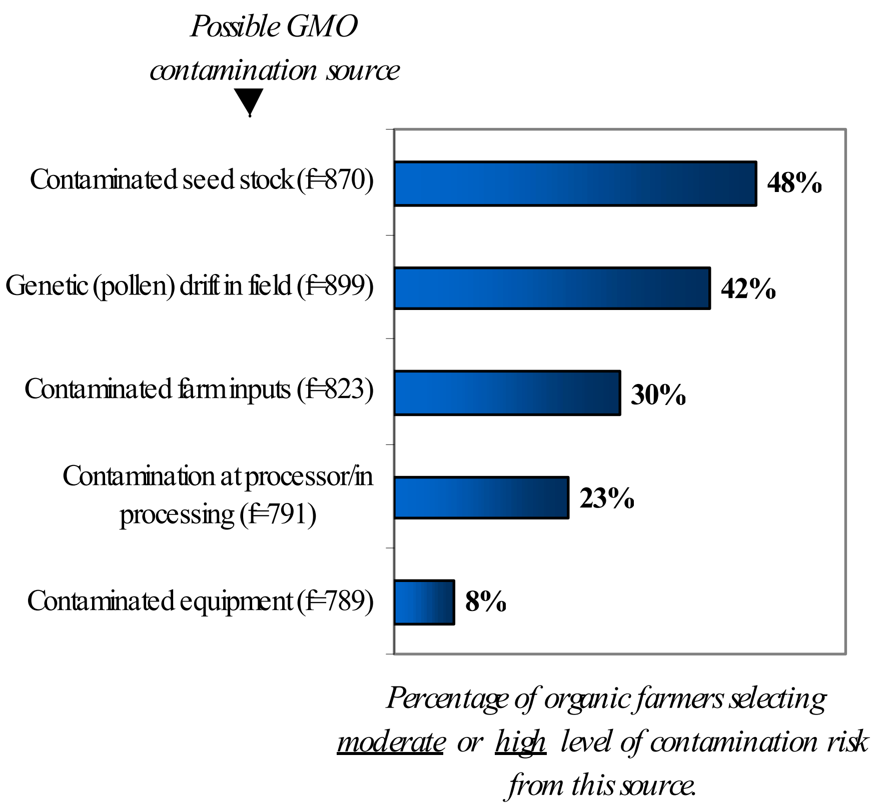
Q. Based on what you know today about the use of GMOs in agriculture, what do you believe is the risk of exposure and contamination of your organic farm product(s) by GMOs?



- 46% rated their risk of contamination as *moderate* or greater
- 30% characterized their contamination risk as *high* to *very high*

Q. What sources, if any, do you feel present risks of GMO contamination to your organically grown products, and to what degree?

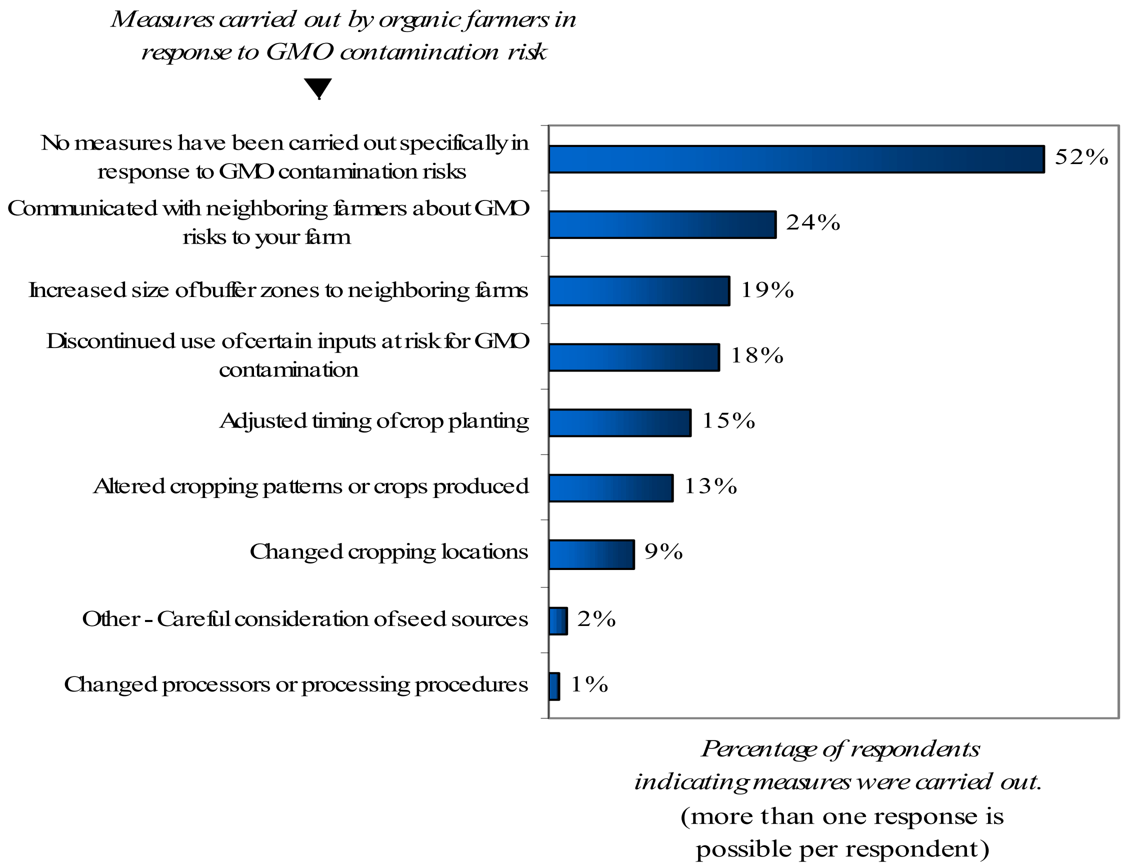
Figure 7.2 – Perceived sources of GMO contamination risk



- Respondents identified *contaminated seed stock* and *pollen drift* as presenting the highest level of GMO contamination risk

Q. 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?

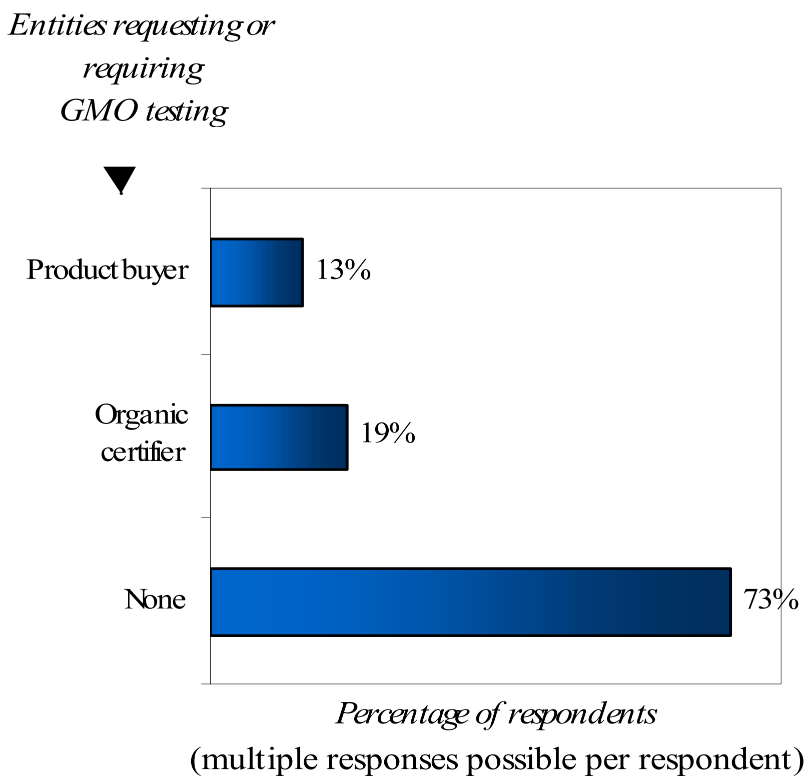
Figure 7.3–Measures carried out in response to GMO risks. 922 respondents.



- 48% of respondents have carried out some measure in response to contamination risk.
- The greatest percentage 24%, communicated with neighboring farmers.
- Other measures represent potential financial financial impacts.

Q. What entities, if any, have requested or required that any of your farm's seed, inputs or products be tested for GMOs?

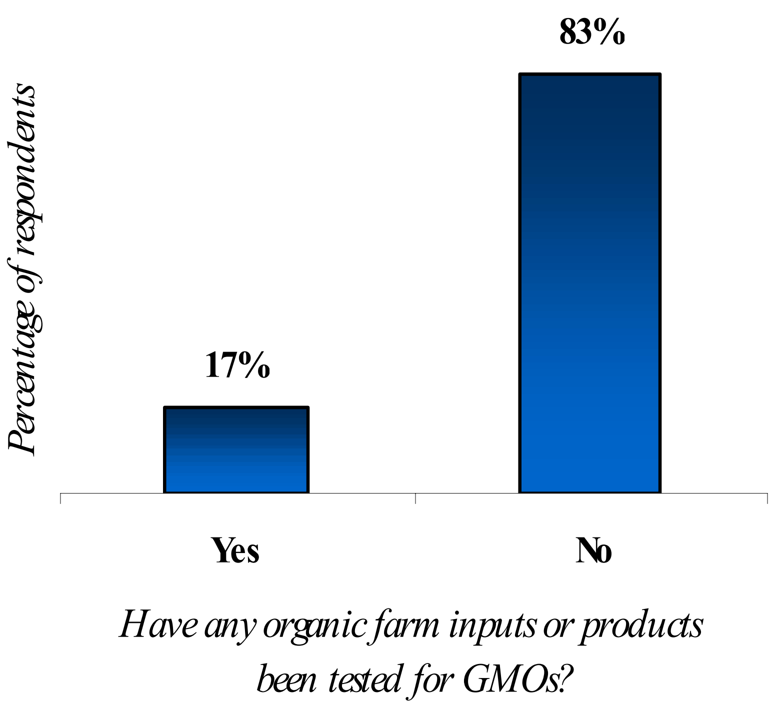
Figure 7.4–Incidence of buyer or certifier requests for GMO testing. 969 respondents.



- 27% of respondents have had a GMO test either requested or required by an organic certifier or a buyer.

Q. Has any of your farm's seed, other inputs or organic farm product been tested for GMOs?

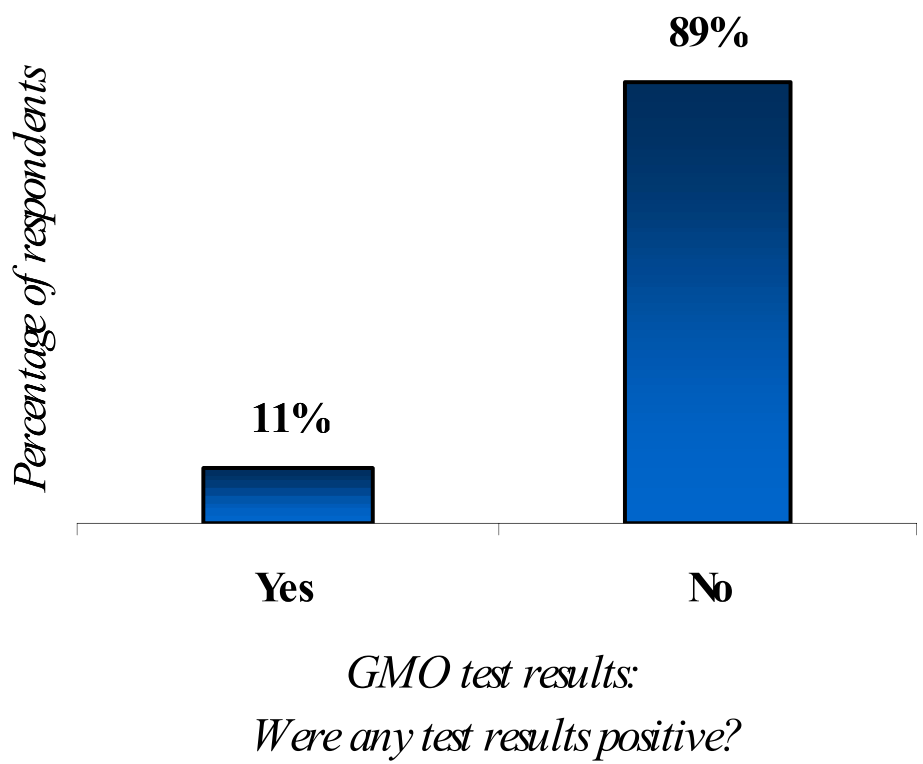
Figure. 7.5--Incidence of GMO testing. 979 respondents.



- 17% of respondents have had GMO testing conducted.

Q. Did any of these seed, input, or organic products test positive for GMO contamination?

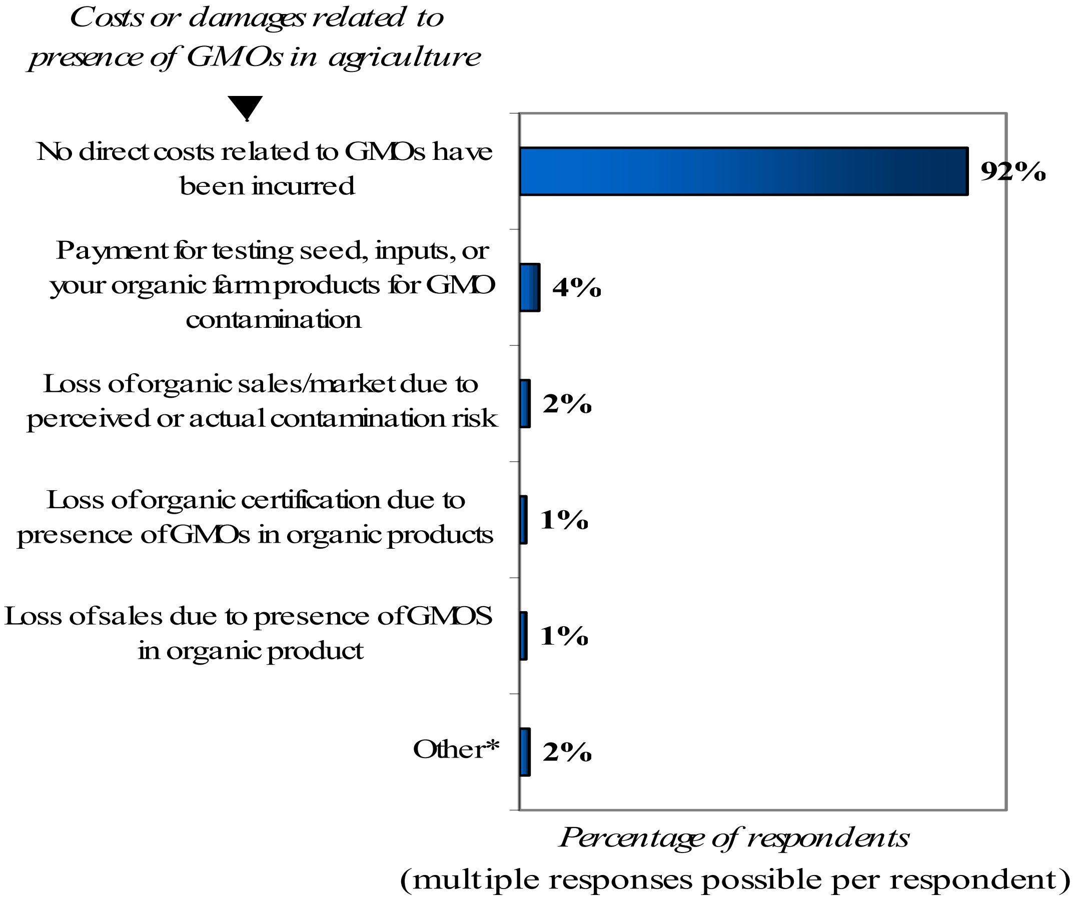
Figure 7.6–Results of GMO testing. 233 respondents.



- 11% of those who have had GMO testing done received a positive test result.
- This represents 2% of the total respondent population.

Q. Has your organic farm operation borne any direct costs or damages related to the presence of GMOs in agriculture?

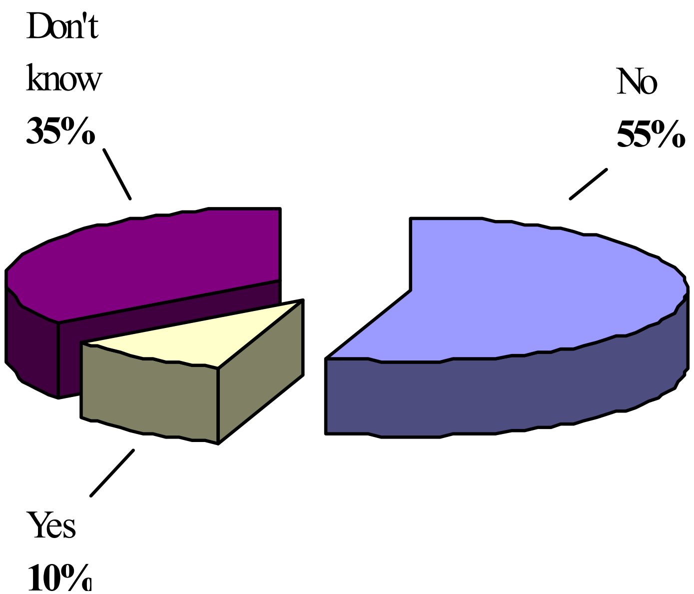
Figure 7.7 – Direct costs or damages incurred by GMOs. 938 respondents.



- 8% of respondents indicated that their organic farm has borne some direct costs or damages from GMOs

Q. 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?

Figure 7.8--Organic farmers opinions on whether there is sufficient regulagory protection from GMO contamination. 990 respondents.



- Only 10% of respondents feel that a sufficient regulatory framework is in place to protect their organic products from GMO contamination