

ORGANICS PROCESSING INDUSTRY: Annual national survey			National	NSW	WA	SA	VIC	QLD
National Aggregate Survey 2009/10 Financial Year			total	total	total	total	total	total
<b>SECTION A - Organisation details</b>								
<b>2 Facility type</b>	<b>Total</b>	<b>No.</b>	<b>187</b>	<b>64</b>	<b>28</b>	<b>33</b>	<b>20</b>	<b>42</b>
On-farm operation			51	23	2	10		16
Council facility			6	2	1	2		1
Licensed commercial facility			105	35	25	20		25
Other <sup>1</sup>			25	4		1	20	
	<b>Response rate%</b>		94	100	100	97	74	98
<b>SECTION B: Raw materials received/processed</b>								
<b>3 Total quantity of raw materials processed</b>	<b>t</b>		<b>5,808,670</b>	<b>1,808,369</b>	<b>696,129</b>	<b>678,587</b>	<b>628,346</b>	<b>1,997,239</b>
<b>4 Types of raw materials processed</b>								
Garden organics (green organics / garden vegetation)	t		1,583,417	608,798	210,965	219,795	177,240	366,619
Wood/timber/sawdust (from commercial/industrial sources)	t		259,420	75,491	39,199	20,890	90,246	33,594
Sawdust (from forestry residuals)	t		239,004	102,670	18,990	13,920	27,752	75,672
Barks (from forestry residuals)	t		777,356	150,806	132,270	210,200	87,327	196,753
Food organics (food waste)	t		211,775	100,235	7,453	5,687	84,120	14,280
Biosolids/grit/screenings	t		1,149,938	169,010	26,121	5,100	27,687	922,020
Oils, grease trap, sludges	t		282,527	23,730	30,756	55,500	70,053	102,488
Straw	t		24,650	1,850	7,490	9,410	5,900	
Manure	t		657,516	378,297	32,100	61,330	52,521	133,268
Animal bedding	t		23,970	250	10,520	7,000	5,500	700
Animal mortalities	t		7,412	2,412	4,700	300		
Paunch	t		63,794	750	1,750	9,000		52,294
Other - Miscellaneous agricultural organics	t		80,851	21,100	9,000	9,105		41,646
Other - Paper pulp/sludge	t		57,050	7,000		50,050		
Other - MSW (organic fraction)	t		282,700	112,775	143,420			26,505
Other - Biowaste	t		50,250	50,250				
Other - Miscellaneous	t		57,040	2,945	21,395	1,300		31,400

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<b>SECTION C: Recycled organics product types and quantities sold</b>								
<b>5 Total quantity of product sold, recycled organics content<sup>2</sup>, market breakdown<sup>3 6</sup></b>								
<i>Composted soil conditioner</i>								
	<b>Quantity product sold<sup>3</sup></b>	<b>m<sup>3</sup></b>	<b>1,431,347</b>	<b>538,422</b>	<b>322,450</b>	<b>101,429</b>	<b>202,100</b>	<b>266,946</b>
	Recycled organic content	%	98	100	97	98	100	95
	Intensive agriculture	m <sup>3</sup>	178,498	47,060	22,542	51,136		57,760
	Extensive agriculture	m <sup>3</sup>	146,384	39,151	66,136	10,007		31,090
	Urban amenity	m <sup>3</sup>	826,255	419,315	204,515	35,679		166,746
	Rehabilitation	m <sup>3</sup>	45,987	27,283	9,454	1,250		8,000
	Enviro-remediation	m <sup>3</sup>	25,066	4,914	19,802			350
<i>Pasteurised soil conditioner</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>182,759</b>	<b>136,694</b>	<b>26,700</b>	<b>1,594</b>	<b>5,746</b>	<b>12,025</b>
	Recycled organic content	%	94	100	88	100	100	83
	Intensive agriculture	m <sup>3</sup>	532					532
	Extensive agriculture	m <sup>3</sup>	18,488	16,556				1,932
	Urban amenity	m <sup>3</sup>	55,455	17,600	26,700	1,594		9,561
	Rehabilitation	m <sup>3</sup>	64,782	64,782				
	Enviro-remediation	m <sup>3</sup>	27,756	27,756				
<i>Composted mulch</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>480,132</b>	<b>46,755</b>	<b>127,619</b>	<b>159,987</b>	<b>42,921</b>	<b>102,850</b>
	Recycled organic content	%	100	100	100	100	100	100
	Intensive agriculture	m <sup>3</sup>	90,826	9,345	3,064	59,668		18,750
	Extensive agriculture	m <sup>3</sup>	3,305		2,229	1,076		
	Urban amenity	m <sup>3</sup>	253,816	25,260	109,588	34,868		84,100
	Rehabilitation	m <sup>3</sup>	18,889	12,150	6,739			
	Enviro-remediation	m <sup>3</sup>	6,000		6,000			
<i>Pasteurised mulch</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>293,471</b>	<b>41,950</b>	<b>93,750</b>	<b>67,851</b>	<b>89,920</b>	
	Recycled organic content	%	80	100	100	100	100	
	Intensive agriculture	m <sup>3</sup>	1,150			1,150		
	Extensive agriculture	m <sup>3</sup>	0					
	Urban amenity	m <sup>3</sup>	162,801	2,350	93,750	66,701		
	Rehabilitation	m <sup>3</sup>	39,600	39,600				
	Enviro-remediation	m <sup>3</sup>	0					
<i>Raw mulch</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>1,841,380</b>	<b>65,400</b>	<b>222,339</b>	<b>748,400</b>	<b>457,374</b>	<b>347,867</b>
	Recycled organic content	%	100	100	100	100	100	100
	Intensive agriculture	m <sup>3</sup>	71,705	393	70,596			717
	Extensive agriculture	m <sup>3</sup>	15,000		15,000			
	Urban amenity	m <sup>3</sup>	684,491	65,008	123,943	148,400		347,140
	Rehabilitation	m <sup>3</sup>	12,800		12,800			
	Enviro-remediation	m <sup>3</sup>	0					
<i>Manufactured soil</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>1,100,599</b>	<b>395,362</b>	<b>184,828</b>	<b>64,213</b>	<b>133,385</b>	<b>322,811</b>
	Total RO content in product	m <sup>3</sup>	696,669	267,641	89,189	37,295	133,385	169,159
	Recycled organic content	%	20 - 100	40 - 100	45 - 100	20 - 100	50-100	30 - 80
	Intensive agriculture	m <sup>3</sup>	10,711	42				10,669
	Urban amenity	m <sup>3</sup>	946,133	348,950	220,828	64,213		312,142
	Rehabilitation	m <sup>3</sup>	43,310	43,310				
	Enviro-remediation	m <sup>3</sup>	3,060	3,060				
<i>Potting mixes</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>779,596</b>	<b>190,113</b>	<b>166,933</b>	<b>176,273</b>	<b>58,477</b>	<b>187,800</b>
	Total RO content in product	m <sup>3</sup>	601,603	119,509	89,691	159,026	58,477	174,900
	Recycled organic content	%	20 - 100	20 - 100	45 - 100	90 - 100	80-100	75 - 100
	Intensive agriculture	m <sup>3</sup>	157,397	3,019	4,433	149,945		
	Urban amenity	m <sup>3</sup>	563,722	187,094	162,500	26,328		187,800

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<b>SECTION C: Recycled organics product types and quantities sold (continued)</b>							
<i>Playground surfacing</i>							
	Quantity product sold	m <sup>3</sup>	144,592	12,300	25,052	86,740	20,500
	Recycled organic content	%	100	100	100	100	100
	Urban amenity	m <sup>3</sup>	57,852	12,300	25,052		20,500
<i>Biofuels/biogas (energy from methane)</i>							
	Quantity product sold	kWh	16,601,500	16,601,500			
<i>Biofuels/solid fuel</i>							
	Quantity product sold	m <sup>3</sup>	0				
<i>Other - Composted products</i>							
	Quantity product sold	m <sup>3</sup>	35,480	23,250	12,200		30
	Recycled organic content	%	73	90	100		100
	Intensive agriculture	m <sup>3</sup>	5,265	5,250			15
	Extensive agriculture	m <sup>3</sup>	0				
	Urban amenity	m <sup>3</sup>	18,015	18,000			15
	Rehabilitation	m <sup>3</sup>	0				
	Enviro-remediation	m <sup>3</sup>	10,200		10,200		
<i>Other - Organic fertiliser</i>							
	Quantity product sold	t	22,080	1,400	20,000		680
	Recycled organic content	%	100	100			100
	Intensive agriculture	t	0				
	Extensive agriculture	t	0				
	Urban amenity	t	0				
	Rehabilitation	t	0				
	Enviro-remediation	t	280				280
<i>Other - Composted manure</i>							
	Quantity product sold	m <sup>3</sup>	663,242	487,143	26,208	120,620	29,271
	Recycled organic content	%	80	100	100	99	100
	Intensive agriculture	m <sup>3</sup>	268,380	246,300	3,911	15,250	2,919
	Extensive agriculture	m <sup>3</sup>	88,558	5,000	2,297	63,957	17,304
	Urban amenity	m <sup>3</sup>	86,308	65,028	20,000	979	301
	Rehabilitation	m <sup>3</sup>	13,325	13,300			25
	Enviro-remediation	m <sup>3</sup>	125	125			
<i>Other - Raw manure</i>							
	Quantity product sold	m <sup>3</sup>	140,016	35,050	10,000	35,400	59,566
	Recycled organic content	%	100	100	100	100	50
	Intensive agriculture	m <sup>3</sup>	12,065	345		11,720	
	Extensive agriculture	m <sup>3</sup>	56,235	32,555		23,680	
	Urban amenity	m <sup>3</sup>	12,150	2,150	10,000		
	Rehabilitation	m <sup>3</sup>	0				
	Enviro-remediation	m <sup>3</sup>	0				
<i>Other - Direct land application</i>							
	Quantity product sold	m <sup>3</sup>	560,000	110,000			450,000
	Recycled organic content	%	36	57			14
	Food organics	m <sup>3</sup>	54,000	54,000			
	Biosolids	m <sup>3</sup>	482,000	32,000			450,000
	Other	m <sup>3</sup>	23,000	23,000			
<i>Other - Aqueous compost extracts</i>							
	Quantity product sold	L	2,016,000	10,000	2,000,000		6,000
	Intensive agriculture	L	1,410,000	10,000	1,400,000		
	Extensive agriculture	L	0				
	Urban amenity	L	606,000		600,000		6,000
	Rehabilitation	L	0				
	Enviro-remediation	L	0				
<b>SECTION D: Inventory on site</b>							
<b>6 Total all material/product on site 30-06-2010 <sup>4</sup></b>		<b>m<sup>3</sup></b>	<b>3,327,758</b>	<b>661,057</b>	<b>537,646</b>	<b>984,305</b>	<b>1,144,750</b>

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SECTION E: Industry issues and priorities							
7 Industry issues, priorities							
<i>Higher value represents a higher priority for industry <sup>7 5</sup></i>							
7.1	Industry structural economics & government incentives	87	18	27	15	6	21
7.2	Gate fees too low (metro areas)/ tender appraisal is price driven	39	12		15	6	6
7.3	Raw materials contamination	69	30	12	12	9	6
7.4	Site regulation and planning consent - inconsistent, unnecessarily costly, requirements don't support policy; Unaffordable new regulatory demands forcing exit from industry	105	33	21	12	15	24
7.5	Development of new products/markets (particularly agriculture)	45	18	3	6	9	9
7.6	Saturation of particular markets	9	6		3		
7.7	Govt interference in markets / direct govt interaction with customers	0					
7.8	Research and development / inadequate compost performance data	12	9				3
7.9	Need application-specific product standards/Product standards need revision	33	15	12			6
7.10	Technical support and training	15	6	3	3	3	
7.11	Viable product price is unaffordable for customers key markets	21	12		3		6
7.12	Industry organisation and communication (internal)	18	9	6			3
7.13	R&D ignoring customer affordability	0					
7.14	Limited local govt commitment to purchase quality compost product/commit to purchase in contracts	12				6	6
7.15	Uncompetetive /non-commercial competition in service delivery from local govt facilities, driving price/quality down	12		9		3	
7.16	Major chains are price driven and will not pay for quality	6	3				3
7.17	Market & political perceptions of compost & industry	21	9	6	3		3
7.18	Limited transfer of research into practice	0					
7.19	Increasing fuel price/transport costs	30	6	3		3	18
7.20	Govt drive to force non-viable investment into high tech composting	3				3	
7.21	Food waste separation not supported / not financially viable	3	3				
7.22	Complaints from neighbours	6			3		3
7.23	Financial incentives for Growers (e.g rebate)	24	9		6	3	6
7.24	Cheap sub-standard products marketed under same product name	6	6				
7.25	Financial and other govt support for waste to energy options	0					
7.26	Standard quality assurance procedures needed	9	3	3	3		
7.27	Mechanism required for recovering ecoservices value	0					
7.28	Compost product marketing and sales support	12	3		6		3
7.29	C&D waste dumped in to market	0					
7.30	No gate fee/levy in regional areas	3	3				
7.31	Downward pressure on prices/quality from increasing supply (oversupply)	18	6	3	6		3
7.32	Inadequate / not enforced regulation of competing products	66	27	9	12	3	15
7.33	Drought and urban water restrictions reducing demand	6	3			3	
7.34	Disposal cost of residuals/contaminants	6				6	
7.35	Product R&D not directed at commercial market demand creation	3		3			
7.36	Inadequate understanding of agricultural economics / risks	0					
7.37	Regulatory definition of "waste" and "beneficial use" restricts transition to sustainability	6	6				
7.38	Other - Delivering value for CA members	15		9	3		3

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<b>SECTION F: Product quality standards</b>							
Number of facilities producing to quality standards	68	16	12	14	8	18	
<b>8.1 Number of processors manufacturing certified product</b>							
AS 4454 - Composts, soil conditioners, mulches	42	11	8	8	6	9	
AS 3743 - Potting mixes	14	4	4	3	2	1	
AS 4419 - Landscaping soils	18	5	5	1	1	6	
Organic product standard - BFA, NASAA	23	7	3	6	1	6	
Other - Biosolids guideline	3	1				2	
Other - Compost Australia Leaf Mark	1		1				
Other	14	3	2	3	3	3	

**Footnotes**

- 1 Other types of facilities include: renderer of offal; direct land application; facilities of unknown license status; licensed on-site facility. Note: Sustainability Vic data did not allow classification
- 2 Recycled organics refers to a range of products manufactured from a variety of compostable organic materials including: garden organics; food organics; residual wood and timber; biosolids; agricultural organics; and other organic materials.
- 3 Note total may not equate to the sum of individual market segments as a small number of processors were not prepared to provide market breakdown.
- 4 Note: figures provided are commonly "informed estimate" rather than formal quantitative survey. Note: Inventories for Vic are excluded as low 2010 response rate provides misleading data
- 5 The green colour indicates most significant issues
- 6 Product quantities reported in Section C may be sold to markets located outside the region
- 7 Note: numerous issues collectively effect commercial viability, including 7.1, 7.2, 7.6, 7.11, 7.15, 7.19, 7.23, 7.29, 7.30, 7.31, 7.32, 7.34