

COMPOST AUSTRALIA - ORGANICS INDUSTRY		National	NSW & ACT	WA	SA	VIC	QLD
National Aggregate Survey 2006/07 Financial Year		total	total	total	total	total	total
SECTION A - Organisation details							
2 Facility type	Total No.	143	47	26	32	19	38
On-farm operation		28	3	2	9		14
Council facility		4			2		2
Licensed commercial facility		104	39	24	19		22
Other ¹		7	5		2		
	Response rate%	97	99	96	97	49	93
SECTION B: Raw materials received/processed							
3 Total quantity of raw materials processed	t	5,170,214	1,828,072	542,342	627,606	378,604	1,793,590
4 Types of raw materials processed							
Garden organics (green organics / garden vegetation)	t	2,311,534	738,158	176,321	209,725	213,660	973,670
Wood/timber/sawdust (from commercial/industrial sources)	t	247,237	67,001	20,899	14,255	112,322	32,760
Sawdust (from forestry residuals)	t	216,569	122,643	13,843	12,720	16,793	50,570
Barks (from forestry residuals)	t	539,260	156,875	108,110	203,625		70,650
Food organics (food waste)	t	79,272	48,920	575	3,981	25,796	
Biosolids/grit/screenings	t	620,283	195,500	23,083	600	1,800	399,300
Oils, grease trap, sludges	t	163,589	27,900	20,700	25,384	15	89,590
Straw	t	13,500	1,150	5,500	6,850		
Manure	t	477,615	319,955	27,550	68,430		61,680
Animal bedding	t	23,550	3,500	12,000	7,550		500
Animal mortalities	t	10,853	7,683	3,000	150		20
Paunch	t	25,650	500	800	7,300		17,050
Other - Miscellaneous agricultural organics	t	70,171	3,325	4,080	16,353	2,993	43,420
Other - Paper pulp/sludge	t	53,543	3,500		50,033		10
Other - MSW (organic fraction)	t	237,585	109,481	83,104			45,000
Other - Biowaste	t	15,500	15,500				
Other - Miscellaneous	t	64,503	6,481	42,777	650	5,225	9,370

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SECTION C: Recycled organics product types and quantities sold								
5 Total quantity of product sold, recycled organics content ², market breakdown ⁶								
<i>Composted soil conditioner</i>								
	Quantity product sold ³	m³	1,003,395	418,849	241,637	128,979	54,900	159,030
	Recycled organic content	%	97	97	96	98		97
	Intensive agriculture	m ³	122,986	28,272	22,476	36,068		36,170
	Extensive agriculture	m ³	89,664	14,092	56,851	2,221		16,500
	Urban amenity	m ³	629,633	345,362	140,526	37,685		106,060
	Rehabilitation	m ³	22,787	9,603	12,284	900		
	Enviro-remediation	m ³	14,020	4,520	9,500			
<i>Pasteurised soil conditioner</i>								
	Quantity product sold	m³	84,542	21,500	2,000	15,042		46,000
	Recycled organic content	%	100	100	100	100		100
	Intensive agriculture	m ³	15,000	0		15,000		
	Extensive agriculture	m ³	36,400	8,400				28,000
	Urban amenity	m ³	4,642	2,600	2,000	42		
	Rehabilitation	m ³	28,500					18,000
	Enviro-remediation	m ³	0					
<i>Composted mulch</i>								
	Quantity product sold	m³	707,436	85,452	282,922	102,464	149,488	87,110
	Recycled organic content	%	100	100	100	100		100
	Intensive agriculture	m ³	97,110	3,600	7,410	55,100		31,000
	Extensive agriculture	m ³	1,800		1,800			
	Urban amenity	m ³	431,033	80,352	258,212	36,359		56,110
	Rehabilitation	m ³	12,780	1,050	10,100	1,630		
	Enviro-remediation	m ³	5,850	450	5,400			
<i>Pasteurised mulch</i>								
	Quantity product sold	m³	91,700	14,500	18,500	58,700		
	Recycled organic content	%	100	100	100	100		
	Intensive agriculture	m ³	16,940	700		16,240		
	Extensive agriculture	m ³	0					
	Urban amenity	m ³	59,160	4,700	13,500	40,960		
	Rehabilitation	m ³	8,500	7,000		1,500		
	Enviro-remediation	m ³	2,100	2,100				
<i>Raw mulch</i>								
	Quantity product sold	m³	1,431,646	109,002	328,950	699,393		294,301
	Recycled organic content	%	100	100	100	100		100
	Intensive agriculture	m ³	37,919		10,000	27,669		
	Extensive agriculture	m ³	0					
	Urban amenity	m ³	743,863	93,693	235,990	119,879		294,301
	Rehabilitation	m ³	5,816	3,971		1,845		
	Enviro-remediation	m ³	0					
<i>Manufactured soil</i>								
	Quantity product sold	m³	1,203,650	448,171	168,000	39,919	94,250	453,310
	Total RO content in product	m ³	599,614	303,238	80,350	24,456		191,571
	Recycled organic content	%	20 - 100	30 - 100	45 - 50	20 - 100		30 - 80
	Intensive agriculture	m ³	2,622	300		222		2,100
	Urban amenity	m ³	829,678	437,771	168,000	39,697		184,210
	Rehabilitation	m ³	273,700	6,700				267,000
	Enviro-remediation	m ³	3,400	3,400				
<i>Potting mixes</i>								
	Quantity product sold	m³	474,540	180,599	81,417	153,333	10,100	49,091
	Total RO content in product	m ³	288,451	52,258	61,867	135,991		38,334
	Recycled organic content	%	20 - 100	75-100	45 - 100	80 - 100		20 - 100
	Intensive agriculture	m ³	127,516	3,692	920	122,904		
	Urban amenity	m ³	256,924	96,907	80,497	30,429		49,091

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SECTION C: Recycled organics product types and quantities sold (continued)							
<i>Playground surfacing</i>							
	Quantity product sold	m³	43,132	8,000	19,789		15,343
	Recycled organic content	%	100	100	100		100
	Urban amenity	m ³	43,132	8,000	19,789		15,343
<i>Biofuels/biogas (energy from methane)</i>							
	Quantity product sold	kWh	13,496,558	13,496,558			
<i>Biofuels/solid fuel</i>							
	Quantity product sold	m³	10,000	10,000			
<i>Other - Composted products</i>							
	Quantity product sold	m³	129,500	116,000	13,480		20
	Recycled organic content	%	98	95	100		100
	Intensive agriculture	m ³	15,562	2,072	13,480		10
	Extensive agriculture	m ³					
	Urban amenity	m ³	113,938	113,928			10
	Rehabilitation	m ³					
	Enviro-remediation	m ³					
<i>Other - Organic fertiliser</i>							
	Quantity product sold	t	1,620	1,400			220
	Recycled organic content	%	100	100			100
	Intensive agriculture	t	0	0			
	Extensive agriculture	t	0	0			
	Urban amenity	t	0	0			
	Rehabilitation	t					
	Enviro-remediation	t					220
<i>Other - Composted manure</i>							
	Quantity product sold	m³	340,765	260,300	4,000	58,809	17,656
	Recycled organic content	%	100	100	100	100	100
	Intensive agriculture	m ³	208,846	195,000	2,000	7,846	4,000
	Extensive agriculture	m ³	51,607		1,000	37,621	12,986
	Urban amenity	m ³	69,562	54,550	1,000	13,342	670
	Rehabilitation	m ³	10,500	10,500			
	Enviro-remediation	m ³	250	250			
<i>Other - Raw manure</i>							
	Quantity product sold	m³	110,432	66,400	6,000	36,032	2,000
	Recycled organic content	%	100	100	100	100	100
	Intensive agriculture	m ³	46,925	27,725		18,200	1,000
	Extensive agriculture	m ³	25,890	8,090		16,800	1,000
	Urban amenity	m ³	10,585	4,585	6,000		
	Rehabilitation	m ³					
	Enviro-remediation	m ³					
<i>Other - Direct land application</i>							
	Quantity product sold	m³	181,052	65,052			116,000
	Recycled organic content	%	36	57			14
	Food organics	m ³					
	Biosolids	m ³	181,000	65,000			116,000
	Other	m ³					
<i>Other - Aqueous compost extracts</i>							
	Quantity product sold	L	2,102,000	100,000	2,000,000		2,000
	Intensive agriculture	L	1,400,000		1,400,000		
	Extensive agriculture	L					
	Urban amenity	L	600,000		600,000		
	Rehabilitation	L					
	Enviro-remediation	L					
SECTION D: inventory on site							
	6 Total all material/product on site 30-06-07 ⁴	m³	3,568,987	914,206	737,106	1,000,350	917,325

COMPOST AUSTRALIA - ORGANICS INDUSTRY National Aggregate Survey 2006/07 Financial Year	National total	NSW & ACT total	WA total	SA total	VIC total	QLD total
SECTION E: Industry issues and priorities						
7 Industry issues, priorities						
<i>Higher value represents a higher priority for industry</i>						
7.1 Industry structural economics & government incentives	48	21	6	9		12
7.2 Gate fees too low (metro areas)/ tender appraisal is price driven	36	21		15		
7.3 Raw materials contamination	57	21	12	15		9
7.4 Site regulation and planning consent - inconsistent, unnecessarily costly, requirements don't support policy; Unaffordable new regulatory demands forcing exit from industry	129	39	27	27		36
7.5 Development of new products/markets (particularly agriculture)	54	30	12	12		
7.6 Saturation of particular markets	12	9	3			
7.7 Govt interference in markets / direct govt interaction with customers	3	3				
7.8 Research and development / inadequate compost performance data	39	27		9		3
7.9 Product quality standards need revision	21	12	6			3
7.10 Technical support and training	9	3	6			
7.11 Viable product price is unaffordable for customers key markets	45	21		3		21
7.12 Industry organisation and communication	6	3	3			
7.13 R&D ignoring customer affordability	6	3				3
7.14 Limited government purchasing / green purchasing	9	9				
7.15 Uncompetetive /non-commercial competition in service delivery from local govt facilities, driving price/quality down	12	3	9			
7.16 Major chains are price driven and will not pay for quality	6	6				
7.17 Industry branding ('waste')/ obsolete market perceptions	3	0				3
7.18 Limited transfer of research into practice	0	0				
7.19 Increasing fuel price/transport costs	60	18	9			33
7.20 Govt drive to force non-viable investment into high tech composting	0	0				
7.21 Food waste separation not supported / not financially viable	6	6				
7.22 Complaints from neighbours	3	0				3
7.23 Financial incentives for Growers (e.g rebate)	39	12	9	9		9
7.24 Cheap sub-standard products marketed under same product name	0	0				
7.25 Financial and other govt support for waste to energy options	0	0				
7.26 Standard quality assurance procedures needed	6	0	6			
7.27 Mechanism required for recovering ecoservices value	0	0				
7.28 Compost product marketing and sales support	27	12		3		12
7.29 C&D waste dumped in to market	0	0				
7.30 No gate fee/levy in regional areas	0	0				
7.31 Downward pressure on prices/quality from increasing supply (oversupply)	24	9	9	6		
7.32 Inadequate / not enforced regulation of competing products	66	24	18	12		12
7.33 Water restrictions reducing demand (urban)	18	3		15		
7.34 Need application-specific product standards	6	3	3			
7.35 Product R&D not directed at commercial market demand creation	6	3	3			
7.36 Innadequate understanding of agricultural economics / risks	3	3				
7.37 Regulatory definition of "waste" and "beneficial use" restricts transition to sustainability	0	0				
7.38 Other - reductions in rural water allocations suppressing farm production & demand	6	6				

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SECTION F: Product quality standards						
		0				
Number of facilities producing to quality standards	26	12	8	6		
		0				
8.1 Number of processors manufacturing certified product						
AS 4454 - Composts, soil conditioners, mulches	22	7	6	3		6
AS 3743 - Potting mixes	11	4	3	3		1
AS 4419 - Landscaping soils	14	6	2	1		5
Organic product standard - BFA, NASA	18	3	5	3		7
Other - Biosolids guideline	3	1				2
Other - Soil Foodweb Institute	1	0				1
Other	6	0	2	3		1

Footnotes

- 1 Other types of facilities include: renderer of offal; direct land application; facilities of unknown license status; licensed on-site facility.
- 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 quantitative survey.
- 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