

<b>COMPOST AUSTRALIA - ORGANICS INDUSTRY</b>		<b>National</b>	<b>NSW &amp; ACT</b>	<b>WA</b>	<b>SA</b>	<b>VIC</b>	<b>QLD</b>
<b>National Aggregate Survey 2005/06 Financial Year</b>		<b>total</b>	<b>total</b>	<b>total</b>	<b>total</b>	<b>total</b>	<b>total</b>
<b>SECTION A - Organisation details</b>							
<b>2 Facility type</b>	<b>Total No.</b>	<b>141</b>	<b>45</b>	<b>25</b>	<b>33</b>	<b>19</b>	<b>38</b>
On-farm operation		29	1	2	9		17
Council facility		3			2		1
Licensed commercial facility		101	39	23	20		19
Other <sup>1</sup>		8	5		2		1
	<b>Response rate%</b>	98	100	100	97	49	93
<b>SECTION B: Raw materials received/processed</b>							
<b>3 Total quantity of raw materials processed</b>	<b>t</b>	<b>4,362,745</b>	<b>1,660,163</b>	<b>578,632</b>	<b>566,315</b>	<b>378,604</b>	<b>1,179,031</b>
<b>4 Types of raw materials processed</b>							
Garden organics (green organics / garden vegetation)	t	1,737,559	717,513	159,382	222,499	213,660	424,505
Wood/timber/sawdust (from commercial/industrial sources)	t	229,389	61,525	17,627	14,405	112,322	23,510
Sawdust (from forestry residuals)	t	183,812	108,713	20,593	9,423	16,793	28,290
Barks (from forestry residuals)	t	500,224	129,104	101,720	179,400		90,000
Food organics (food waste)	t	81,866	49,055	1,010	6,005	25,796	
Biosolids/grit/screenings	t	491,856	85,900	23,000		1,800	381,156
Oils, grease trap, sludges	t	173,897	54,000	20,350	17,842	15	81,690
Straw	t	21,400	1,150	4,500	7,650		8,100
Manure	t	474,958	344,732	38,000	27,466		64,760
Animal bedding	t	23,916	3,500	12,346	7,570		500
Animal mortalities	t	4,082	902	3,010	150		20
Paunch	t	47,850	500	800	4,500		42,050
Other - Miscellaneous agricultural organics	t	57,960	3,325	9,500	18,342	2,993	23,800
Other - Paper pulp/sludge	t	56,333	3,500		50,033		2,800
Other - MSW (organic fraction)	t	174,443	79,263	95,180			
Other - Biowaste	t	10,000	8,000	2,000			
Other - Miscellaneous	t	93,200	9,481	69,614	1,030	5,225	7,850

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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>6</sup></b>								
<i>Composted soil conditioner</i>								
	<b>Quantity product sold<sup>3</sup></b>	<b>m<sup>3</sup></b>	<b>976,396</b>	<b>375,843</b>	<b>204,928</b>	<b>213,159</b>	<b>54,900</b>	<b>127,566</b>
	Recycled organic content	%	98	100	96	98		98
	Intensive agriculture	m <sup>3</sup>	130,033	36,675	15,160	53,968		24,230
	Extensive agriculture	m <sup>3</sup>	90,748	2,950	53,290	3,008		31,500
	Urban amenity	m <sup>3</sup>	654,046	306,069	122,818	155,023		70,136
	Rehabilitation	m <sup>3</sup>	15,135	6,695	7,540	900		
	Enviro-remediation	m <sup>3</sup>	10,120	4,000	6,120			
<i>Pasteurised soil conditioner</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>51,330</b>	<b>28,330</b>	<b>2,000</b>	<b>20,000</b>		<b>1,000</b>
	Recycled organic content	%	100	100	100	100		100
	Intensive agriculture	m <sup>3</sup>	29,832	9,832		20,000		
	Extensive agriculture	m <sup>3</sup>	12,732	11,732				1,000
	Urban amenity	m <sup>3</sup>	8,366	6,366	2,000			
	Rehabilitation	m <sup>3</sup>	0					
	Enviro-remediation	m <sup>3</sup>	0					
<i>Composted mulch</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>713,880</b>	<b>96,573</b>	<b>240,745</b>	<b>77,074</b>	<b>149,488</b>	<b>150,000</b>
	Recycled organic content	%	100	100	99	100		100
	Intensive agriculture	m <sup>3</sup>	101,954	3,600	7,296	33,558		57,500
	Extensive agriculture	m <sup>3</sup>	1,000		1,000			
	Urban amenity	m <sup>3</sup>	421,005	79,705	225,449	23,351		92,500
	Rehabilitation	m <sup>3</sup>	8,990	1,850	6,000	1,140		
	Enviro-remediation	m <sup>3</sup>	1,450	450	1,000			
<i>Pasteurised mulch</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>94,569</b>	<b>14,500</b>	<b>18,800</b>	<b>61,269</b>		
	Recycled organic content	%	100	100	100	100		
	Intensive agriculture	m <sup>3</sup>	17,476	700		16,776		
	Extensive agriculture	m <sup>3</sup>	0					
	Urban amenity	m <sup>3</sup>	61,493	4,700	13,800	42,993		
	Rehabilitation	m <sup>3</sup>	8,500	7,000		1,500		
	Enviro-remediation	m <sup>3</sup>	2,100	2,100				
<i>Raw mulch</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>1,197,958</b>	<b>111,014</b>	<b>232,450</b>	<b>566,209</b>		<b>288,285</b>
	Recycled organic content	%	100	100	100	100		100
	Intensive agriculture	m <sup>3</sup>	57,227		12,000	45,227		
	Extensive agriculture	m <sup>3</sup>	0					
	Urban amenity	m <sup>3</sup>	1,115,245	97,043	211,950	517,967		288,285
	Rehabilitation	m <sup>3</sup>	6,986	3,971		3,015		
	Enviro-remediation	m <sup>3</sup>	0					
<i>Manufactured soil</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>1,063,164</b>	<b>416,546</b>	<b>151,050</b>	<b>36,818</b>	<b>94,250</b>	<b>364,500</b>
	Total RO content in product	m <sup>3</sup>	534,371	283,388	72,500	24,084		154,400
	Recycled organic content	%	20 - 100	30 - 100	40 - 100	20 - 100		30 - 80
	Intensive agriculture	m <sup>3</sup>	8,920	300		520		8,100
	Urban amenity	m <sup>3</sup>	700,241	406,496	151,047	36,298		106,400
	Rehabilitation	m <sup>3</sup>	256,528	6,525	3			250,000
	Enviro-remediation	m <sup>3</sup>	3,225	3,225				
<i>Potting mixes</i>								
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>383,299</b>	<b>139,793</b>	<b>79,985</b>	<b>147,021</b>	<b>10,100</b>	<b>6,400</b>
	Total RO content in product	m <sup>3</sup>	205,695	9,325	60,017	130,153		6,200
	Recycled organic content	%	20 - 100	75-100	45 - 100	80 - 100		20 - 100
	Intensive agriculture	m <sup>3</sup>	141,032	18,106	643	122,283		
	Urban amenity	m <sup>3</sup>	152,167	41,687	79,342	24,738		6,400

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<b>National Aggregate Survey 2005/06 Financial Year</b>		<b>total</b>	<b>total</b>	<b>total</b>	<b>total</b>	<b>total</b>	<b>total</b>
<b>SECTION C: Recycled organics product types and quantities sold (continued)</b>							
<i>Playground surfacing</i>							
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>53,577</b>	<b>8,000</b>	<b>30,234</b>		<b>15,343</b>
	Recycled organic content	%	100	100	100		100
	Urban amenity	m <sup>3</sup>	53,577	8,000	30,234		15,343
<i>Biofuels/biogas (methane)</i>							
	<b>Quantity product sold</b>		<b>2,230,117</b>	<b>2,230,117</b>			
<i>Biofuels/solid fuel</i>							
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>14,450</b>	<b>13,700</b>	<b>750</b>		
<i>Other - Composted products</i>							
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>128,440</b>	<b>116,000</b>	<b>12,400</b>		<b>40</b>
	Recycled organic content	%	98	95	100		100
	Intensive agriculture	m <sup>3</sup>	14,492	2,072	12,400		20
	Extensive agriculture	m <sup>3</sup>					
	Urban amenity	m <sup>3</sup>	113,948	113,928			20
	Rehabilitation	m <sup>3</sup>					
	Enviro-remediation	m <sup>3</sup>					
<i>Other - Organic fertiliser</i>							
	<b>Quantity product sold</b>	<b>t</b>	<b>38,520</b>	<b>30,520</b>			<b>8,000</b>
	Recycled organic content	%	63	100			25
	Intensive agriculture	t	11,265	8,265			3,000
	Extensive agriculture	t	13,265	8,265			5,000
	Urban amenity	t	11,020	11,020			
	Rehabilitation	t					
	Enviro-remediation	t					
<i>Other - Composted manure</i>							
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>304,443</b>	<b>230,461</b>	<b>6,000</b>	<b>57,402</b>	<b>10,580</b>
	Recycled organic content	%	100	100	100	100	100
	Intensive agriculture	m <sup>3</sup>	203,375	189,000	3,500	10,875	
	Extensive agriculture	m <sup>3</sup>	47,182		2,500	34,682	10,000
	Urban amenity	m <sup>3</sup>	43,136	30,711		11,845	580
	Rehabilitation	m <sup>3</sup>	10,500	10,500			
	Enviro-remediation	m <sup>3</sup>	250	250			
<i>Other - Raw manure</i>							
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>130,431</b>	<b>65,431</b>	<b>35,000</b>	<b>28,000</b>	<b>2,000</b>
	Recycled organic content	%	98	100	90	100	100
	Intensive agriculture	m <sup>3</sup>	25,429	16,429		8,000	1,000
	Extensive agriculture	m <sup>3</sup>	40,392	19,392		20,000	1,000
	Urban amenity	m <sup>3</sup>	39,610	4,610	35,000		
	Rehabilitation	m <sup>3</sup>					
	Enviro-remediation	m <sup>3</sup>					
<i>Other - Direct land application</i>							
	<b>Quantity product sold</b>	<b>m<sup>3</sup></b>	<b>116,052</b>	<b>52</b>			<b>116,000</b>
	Recycled organic content	%	57	100			14
	Food organics	m <sup>3</sup>					
	Biosolids	m <sup>3</sup>	116,000				116,000
	Other	m <sup>3</sup>					
<i>Other - Aqueous compost extracts</i>							
	<b>Quantity product sold</b>	<b>L</b>	<b>2,102,000</b>	<b>100,000</b>	<b>2,000,000</b>		<b>2,000</b>
	Intensive agriculture	L	1,400,000		1,400,000		
	Extensive agriculture	L					
	Urban amenity	L	600,000		600,000		
	Rehabilitation	L					
	Enviro-remediation	L					
<b>SECTION D: inventory on site</b>							
	<b>6 Total all material/product on site 30-06-06 <sup>4</sup></b>	<b>m<sup>3</sup></b>	<b>3,478,567</b>	<b>825,540</b>	<b>740,302</b>	<b>974,100</b>	<b>938,625</b>

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<b>SECTION E: Industry issues and priorities</b>							
<b>7 Industry issues, priorities</b>							
<i>Higher value represents a higher priority for industry</i>							
7.1 Industry structural economics & government incentives		57	24	3	15		15
7.2 Gate fees too low (metro areas)/ tender appraisal is price driven		33	18		15		
7.3 Raw materials contamination		57	21	12	18		6
7.4 Site regulation and planning consent - inconsistent, unnecessarily costly, requirements don't support policy; Unaffordable new regulatory demands forcing exit from industry		135	39	33	33		30
7.5 Development of new products/markets (particularly agriculture)		42	18	9	15		
7.6 Saturation of particular markets		9	6	3			
7.7 Govt interference in markets / direct govt interaction with customers		3	3				
7.8 Research and development / inadequate compost performance data		39	21	3	12		3
7.9 Product quality standards need revision		27	15	6			6
7.10 Technical support and training		9	6		3		
7.11 Viable product price is unaffordable for customers key markets		51	21	3	9		18
7.12 Industry organisation and communication		9	3	3	3		
7.13 R&D ignoring customer affordability		6	3		3		
7.14 Limited government purchasing / green purchasing		12	12				
7.15 Uncompetetive /non-commercial competition in service delivery from local govt facilities, driving price/quality down		12	3	6			3
7.16 Major chains are price driven and will not pay for quality		6	6				
7.17 Industry branding ('waste')/ obsolete market perceptions		9	3				6
7.18 Limited transfer of research into practice		0	0				
7.19 Increasing fuel price/transport costs		45	21	3			21
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		6	0		3		3
7.23 Financial incentives for Growers (e.g rebate)		36	12	12	9		3
7.24 Cheap sub-standard products marketed under same product name		3	0				3
7.25 Financial and other govt support for waste to energy options		0	0				
7.26 Standard quality assurance procedures needed		9	0	6			3
7.27 Mechanism required for recovering ecoservices value		0	0				
7.28 Compost product marketing and sales support		36	12	3	9		12
7.29 C&D waste dumped in to market		3	0		3		
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		69	24	18	12		15
7.33 Water restrictions reducing demand (urban)		9	6				3
7.34 Need application-specific product standards		6	3		3		
7.35 Product R&D not directed at commercial market demand creation		3	3				
7.36 Innadequate understanding of agricultural economics / risks		0	0				
7.37 Regulatory definition of "waste" and "beneficial use" restricts transition to sustainability		3	3				
7.38 Other - loss of biofuel market that mitigated oversupply pressures		15	12	3			

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<b>SECTION F: Product quality standards</b>							
<b>8.1 Number of processors manufacturing certified product</b>							
AS 4454 - Composts, soil conditioners, mulches		21	7	3	5		6
AS 3743 - Potting mixes		10	3	2	3		2
AS 4419 - Landscaping soils		12	5	2	1		4
Organic product standard - BFA, NASAA		16	3	4	3		6
Other - Biosolids guideline		2	0				2
Other - Soil Foodweb Institute		2	0	1			1
Other		4	0	1			3

*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