SOCIAL RESEARCH

Perceptions of recycled organic products

SUMMARY OF KEY FINDINGS – MAY 2018

Background

The Victorian Organics Resource Recovery Strategy (Strategy) was released in 2015 by Sustainability Victoria, on behalf of the Victorian Government. The Strategy provides a strategic, long-term framework for government, industry and the community to better manage organic Victoria's waste.

The Strategy recognises that the absence of strong and sustainable end markets is a significant barrier to organic waste and resource recovery in Victoria. Commercial composters in Victoria are increasingly seeking to expand the supply of recycled organic products into agricultural markets.

Axiom Research, on behalf of Sustainability Victoria, conducted social research to identify the opportunities and barriers of increasing the use of recycled organics in agricultural sectors in Victoria.

The survey design was informed by a recycled organics industry review and the survey content was developed with input from a range of relevant experts on questionnaire design, organics recovery and a range of agricultural activities.

The research was conducted in early 2018 using a CATI (Computer Assisted Telephone Interviewing) methodology.

A total of 482 Victorian famers took part in the survey. The survey focused on three key areas of Victoria – Goulburn Valley, Gippsland and Loddon/Mallee – which offer a variety of agricultural activities and good access to supply of recycled organic products due to their proximity to commercial composting sites.

The results of the research will be used by Sustainability Victoria and actively promoted to key industry stakeholders to:

- Inform the development of programs, e.g. education/field trials and demonstration projects
- Guide the evolution of market development strategies

This document summaries the key findings from the social research.

Sustainability Victoria

Key findings

Farmers are interested in adopting more sustainable farming practices

71% agree it would be preferable to create a sustainable and healthy soil structure, rather than applying regular fertiliser

82% or 4 out of 5 farmers think a lot about soil health

89% would invest more in the condition of their soil if they knew it would improve the bottom line

81% or 4 out of 5 farmers use fertilisers to add nutrients to improve agricultural productivity.

Most farmers are currently still following traditional fertiliser regimes

In the last 12 months:

2/3 of farmers have used synthetic fertilisers – different types of fertilizer e.g Single superphosphate (SSP) monoammonium phosphate (MAP) and diammonium phosphate (DAP)

5% have used recycled organic products.

12% have ever used recycled organic products

91% of those farmers that have used recycled organic products are likely to consider using it again.

Farmers' awareness of alternatives to synthetic fertilisers is growing

39% of farmers are aware that recycled organic products are available

When the availability of recycled organic products was explained, more than half of farmers (56%) indicated that they would consider using them

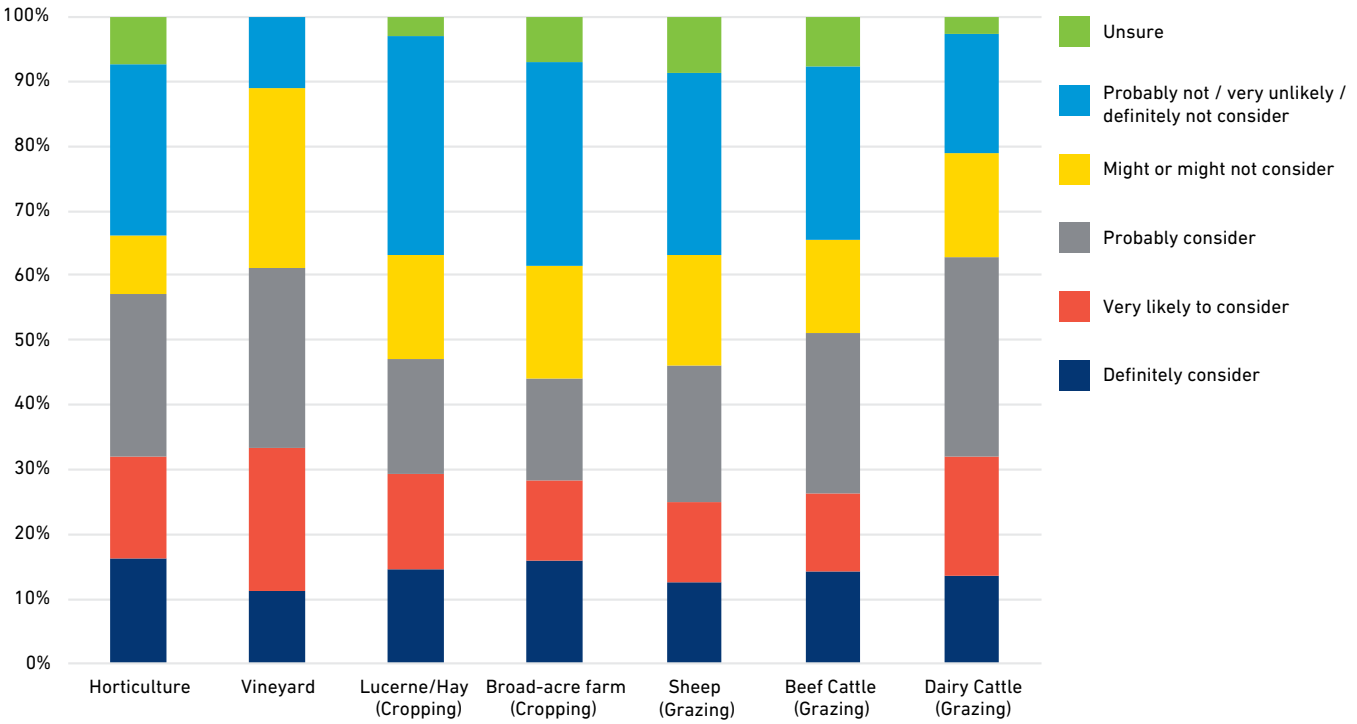
15% would definitely consider using them

16% are very likely to consider using them

25% would probably consider using them

Opportunities for using recycled organic products

Horticulture, vineyards, dairy and beef farming were identified as the most likely users of recycled organic products.



Of those who were likely to use recycled organic products and indicated they would:

17% use it exclusively to replace existing fertiliser options (mainly vineyards, horticulture, sheep grazing) – substitution customers

45% use recycled organic products with conventional fertilisers – transitional customers

23% rely on conventional fertilisers, but they trial recycled organic products – prospective customers

15% use some other way or simply didn't know

Farmers identified the top three important benefits of using recycled organic products as:

1 Better moisture retention

2 Improving soil health

3 Farm productivity outcomes – e.g. better carcass weight or high crop yields

Barriers to using recycled organic products

The key concerns from farmers about using recycled organic products are:

- **Potential for contamination due to lack of control of feedstocks**
- **Biosecurity – ensuring products are free of disease and weeds**
- **Availability and the ability to spread products using standard farmer equipment**

Next steps

The survey found that increasing awareness of the benefits of using recycled organic products was the key variable in the propensity of the farmer population to trial or adopt recycled organic products.

Based on the results of the survey two propensity models were developed:

1. The first model estimates the likely scale of an on-farm trial a farmer might undertake using recycled organic products, before a large-scale adoption could take place
2. The second is a propensity to adopt model – which estimates the scale at which farmers would adopt use of the recycled organic products following a successful trial.

Based on current awareness levels, adoption of RO compost has the potential to use 1,708,000 tonnes of RO which would cover approximately 308,000 hectares of farmland. Sustainability Victoria will continue to work to develop these end markets.

Raising awareness and ensuring satisfactory success rates – through ensuring quality products that are affordable and fit-for-purpose – are the key factors in increasing adoption and conversion to recycled organic products.

Further Information

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