Survey of Organic Farmers and Ranchers from the Four Corner States for 2005

SURVEY RESULTS

This document includes descriptive and frequency results from the 2005 survey of organic farmers and ranchers in the Four Corner States. See PDF of the survey to view actual questions.

Note: This frequency report includes an accounting of missing/non-response for individual questions asked on the survey. This was done to provide complete information from the survey for researchers interested in using the data. The report of the survey (*The Organic Market in the Four Corners State: Opportunities for Growth*) generally excludes individual missing and non-response in the denominator, reporting valid percentages instead. Thus, when reviewing the materials, please be aware that the percentages reported in the two reports may not be identical due to the different methodologies used.

Compiled by Lydia Oberholtzer.
If you have any questions about this data, please contact Lydia Oberholtzer at lydiaoberholtzer@gmail.com.

Responses by State and Total

State	Number of surveys returned
Arizona	7
Colorado	72
New Mexico	37
Utah	25
Total	141

Question 3: Total years a certified organic producer.

N	Minimum	Maximum	Mean	Std. Deviation
138	1	25	7.40	5.068

Years Certified	Frequency	Percent	Valid Percent*
1	19	13.5	13.8
2	12	8.5	8.7
3	7	5.0	5.1
4	1	0.7	0.7
4	6	4.3	4.3
5	12	8.5	8.7
6	10	7.1	7.2
7	8	5.7	5.8
8	13	9.2	9.4
9	2	1.4	1.4
10	14	9.9	10.1
11	5	3.5	3.6
12	6	4.3	4.3

13	2	1.4	1.4
14	4	2.8	2.9
15	6	4.3	4.3
16	5	3.5	3.6
17	2	1.4	1.4
18	3	2.1	2.2
25	1	0.7	0.7
Total	138	97.9	100.0
Missing	3	2.1	
Total with Missing	141	100.0	

*valid percent is the percent of the total excluding the non-response or missing.

Question 4: Top 3 reasons for the use of organic methods in respondent's operation (ranked 1-3 with 1 being the top reason).

Ranked as #1	Frequency	Percent	Valid Percent
Higher prices	33	23%	33%
Belief in the overall philosophy of organic production	28	20%	28%
Lower health risk for self and family	14	10%	14%
Better market access	9	6%	9%
Better for environment and/or animals	4	3%	4%
High product quality	4	3%	4%
Other	2	1%	2%
Reduced production costs	2	1%	2%
Better for environment and/or animals & belief in the overall philosophy	1	1%	1%
Consumer health	1	1%	1%
Higher prices & better market access	1	1%	1%
Total	99	70%	100%
Missing	42	30%	
Total with missing	141	100%	

Ranked as #2	Frequency	Percent	Valid Percent
Higher prices	20	14%	20%
Belief in the overall philosophy of organic production	19	13%	19%
Lower health risk for self and family	15	11%	15%
Better market access	11	8%	11%
Better for environment and/or animals	9	6%	9%
High product quality	8	6%	8%
Other	7	5%	7%
Reduced production costs	7	5%	7%
Consumer health	2	1%	2%
Total	98	70%	100%
Missing	43	30%	
Total with missing	141	100%	

Ranked as #3	Frequency	Percent	Valid Percent
Belief in the overall philosophy of organic production	24	17%	25%
Consumer health	15	11%	16%
Higher prices	14	10%	15%
Lower health risk for self and family	11	8%	12%
High product quality	10	7%	11%

Better for environment and/or animals	8	6%	8%
Better market access	6	4%	6%
Reduced production costs	4	3%	4%
Other	2	1%	2%
Consumer health & Lower health risk for self and family	1	1%	1%
Total	95	67%	100%
Missing	46	33%	
Total with missing	141	100%	

Cumulative – Number of times in Top 3	Frequency	Percent	Valid Percent
Belief in the overall philosophy of organic production	71	17%	24%
Higher prices	67	16%	23%
Lower health risk for self and family	40	9%	14%
Better market access	26	6%	9%
High product quality	22	5%	8%
Better for environment and/or animals	21	5%	7%
Consumer health	18	4%	6%
Reduced production costs	13	3%	4%
Other	11	3%	4%
Consumer health & Lower health risk for self and family	1	0%	0%
Higher price and better market access	1	0%	0%
Better for environment and/or animals & believe in overall philosophy	1	0%	0%
Total	292	69%	100%
Missing	131	31%	
Total with missing	423	100%	

Question 5: Organic acres owned, privately rented, publicly leased (e.g., grazing permits), sharecropped, or used free of charge by respondents' operation in 2005.

Organic Acres (N=131)	Minimum	Maximum	Sum	Mean	Std. Deviation
Owned	0	10,200	88,643	676.7	1,813.2
Privately rented	0	18,000	27,154	207.3	1,584.1
Publicly leased	0	80,000	104,313	796.3	7,195.3
Sharecropped	0	7,300	19,811	151.2	742.4
Used free of charge	0	600	611	4.7	52.4
Other	0	0	0	0	0

Question 6: Acres in production for the following categories in 2005.

	Minimum	Maximum	Sum	Mean	Std. Deviation
Organic acres in production (N=133)					
Vegetable crops (including melons & sweet corn)	0	1,120	3,740	28.1	126.0
Pasture, grazed land, livestock yards, and facilities	0	30,000	96,092	722.5	3,534.6
Tree or vine fruit and/or nut crops	0	366	1,772	13.3	58.2
Grains, alfalfa, mixed hay, and/or other field crops	0	3,800	31,041	233.4	557.9
Nursery, floriculture, and/or greenhouse crops	0	3	13	0.1	0.4
Herb crops	0	20	38	0.3	2.0

Fallow or idle (acres not in production at all in 2005)	0	3,500	15,780	118.6	443.0
Cover cropped for entire growing season	0	1,200	2,370	17.8	117.5
Other uses (A)	0	15,000	18,715	140.7	1,309.1
Other uses (B)	0	3,200	3,211	24.1	277.5
Transitional acres in production (N=133)					
Vegetable crops (including melons & sweet corn)	0	50	50	0.4	4.3
Pasture, grazed land, livestock yards, and facilities	0	80,000	80,767	607.3	6,936.7
Tree or vine fruit and/or nut crops	0	9	21.1	0.2	1.1
Grains, alfalfa, mixed hay, and/or other field crops	0	2,000	4,895	36.8	234.2
Nursery, floriculture, and/or greenhouse crops	0	0	0	0	0
Herb crops	0	0	0	0	0
Fallow or idle (acres not in production at all in 2005)	0	897	1,098	8.3	79.6
Cover cropped for entire growing season	0	30	30	0.2	2.6
Other uses (A)	0	0	0	0	0
Other uses (B)	0	0	0	0	0
Non-organic acres in production (N=133)					
Vegetable crops (including melons & sweet corn)	0	1,480	2,550	19.2	146.1
Pasture, grazed land, livestock yards, and facilities	0	80,000	84,170	632.9	6,939.4
Tree or vine fruit and/or nut crops	0	400	411	3.1	34.7
Grains, alfalfa, mixed hay, and/or other field crops	0	1,000	3,650	27.4	125.5
Nursery, floriculture, and/or greenhouse crops	0	0	0	0	0
Herb crops	0	0	0	0	0
Fallow or idle (acres not in production at all in 2005)	0	750	1,423.4	10.7	76.2
Cover cropped for entire growing season	0	0	0	0	0
Other uses (A)	0	953	1,929.8	14.5	102.3
Other uses (B)	0	0	0	0	0

Question 7: Whether 2005 harvest was normal, above normal, or below normal, and by what percentage.

Harvest	Frequency	Percent	Valid Percent
Normal harvest in 2005	83	58.9	60.1
Above normal harvest in 2005	23	16.3	16.7
Below normal harvest in 2005	32	22.7	23.2
Total	138	97.9	100.0
Missing	3	2.1	
Total with missing	141	100.0	

Percentage for above and below normal harvest	N	Minimum	Maximum	Mean	Std. Deviation
Above normal harvest	23	3	250	39.7	54.7
Below normal harvest	29	0	80	37.3	21.8

Question 8: Survey respondents' plans to increase, decrease, or maintain organic acreage.

	Frequency	Percent	Valid Percent
Increase 6-33 percent	32	22.7	23.2
Increase 34-66 percent	7	5.0	5.1
Increase 67-100 percent	17	12.1	12.3

Maintain acreage within 5 percent	78	55.3	56.5
Decrease 6-33 percent	2	1.4	1.4
Decrease 34-66 percent	1	0.7	0.7
Decrease 67-100 percent	1	0.7	0.7
Total	138	97.9	100.0
Missing	3	2.1	
Total with missing	141	100.0	

Question 9: Respondents beliefs on how profitable organic production is for his/her farm when compared to conventional or other production techniques and markets?

	Frequency	Percent	Valid Percent
More than 50% more profitable	32	22.7	23.7
26-50% more profitable	23	16.3	17.0
5-25% more profitable	50	35.5	37.0
Does not affect the farm's profitability	19	13.5	14.1
5-25% less profitable	8	5.7	5.9
26-50% less profitable	1	0.7	0.7
More than 50% less profitable	2	1.4	1.5
Total	135	95.7	100.0
Missing	6	4.3	
Total with missing	141	100.0	

Question 10: Top 3 fresh organic commodities grown or raised in 2005. *(Number of times reported in the top 3 commodities)*

Commodity	Frequency Reported
Alfalfa	11
Alfalfa hay	6
Alfalfa sprouts	1
Alpaca fiber	1
Apples	14
Apricots	2
Asparagus	2
Barley grass	1
Basil	8
Beans	1
Bedding plants	1
Beef	5
Beef cattle	1
Beets	1
Broccoli	1
Brussels sprouts	2
Buckwheat greens + pea shoots	1
Cabbage	1
Carrots	2
Cattle	1
Celery	1
Cherries	5
Cherry, sweet	1

Chicken, turkey, duck, eggs	1
Chili – peppers	1
Chives	1
Clover sprouts	1
Corn - organic grain	1
Corn silage	1
Cotton	1
Cover crop seed	1
Cucumbers	4
Cut Flowers	1
Dill	1
Dry beans	1
Eggplant	2
Eggplant and peppers	1
field grown specialty perennial seeds	1
Flowers	2
Fruit	1
Garbanzo beans	1
Garlic	4
Goat milk - all made into cheese	1
Grain sorghum + corn	1
Grapefruit	1
Greenhouse grown potted herbs	1
greenhouse grown potted specialty veggies	1
Greens	1
Greens - Arugula, mustards, kale, etc.	1
Greens - lettuce - spinach - Asian greens	1
Hay	4
Hay graze	1
Herbs	4
Herbs – medicinal	3
Italian plums	1
Lamb	1
Lemon balm	1
Lemons	1
Lettuce	2
Melons	2
Millet hay	1
Mint	1
Mixed vegetables	2
Mohair	1
Mulberries	1
Mushrooms	1
Nectarines	1
Oat alfalfa hay	1
Oat hay	1
Oleic safflower	2
Onions	3
Oranges	1
Other culinary herbs	1
Parsley	2
Peaches	13
Peanuts	2
Pears	7
Pecans	2

Peppers	3
Pinto beans	1
Pluots	1
Pork	1
Potatoes	14
Poultry	1
Produce	1
Pumpkins - winter squash	2
Quinoa	1
Radish sprouts	1
Radishes	1
Raspberries	2
Romaine lettuce	2
Rosemary	1
Safflower	2
Salad greens	2
Seeds	1
Spring Mix	1
Squash	7
Squash – zucchini	1
Strawberries	1
Summer squash	1
Sunflower	1
Sunflower greens, pea greens, etc.	1
Sweet Cherries	1
Sweet corn	2
Table grapes	1
Tomato plants	1
Tomatoes	15
Tritcale	1
Vegetables	5
Watermelon	1
Wheat	4
Wheat (Hard Red Winter)	8
Wheat Grass	3
Wine grapes	1
Winter Squash	1
Winter wheat	1
Yak Meat	1
Zucchini	1

Question 11: Top 3 processed or value-added organic products made in 2005. *(Number of times reported in top 3).* 84 respondents reported not making processed/value-added organic products. Another 25 were missing. Below are the processed/value-added organic products and the frequency they were in the top 3.

Processed or value-added product	Frequency reported
Alpaca fiber throws/blankets	1
Apple juice	3
Applesauce	1
Balsamic vinegar	1
Barley juice Pdr.	1
Beef	3
Bitters extract	1
Cider	1
Crookling wine grape juice	1

Custom grain mixes	1
Cut & frozen beef	1
Dried apples	1
Dried fruit	2
Dried herbs	1
Echinacea angustifolia extract	1
Flour	1
Fruit butters	1
Garlic powder	1
Gourds	1
Goat cheese	1
Grape jelly	1
Grass alfalfa hay	1
Hard cider	1
Herbal body care	1
Honey	1
Infused oil & glycerites	1
Jam	3
Lavender lotion	1
Lemon verbena crème	1
Milk	1
Organic basil paste	1
Other culinary herbs	1
Pinto bean seed	1
Pork	1
Poultry feeds	1
Raspberry jam	1
Rosemary hydrosol	1
Smudge sticks	1
Soil amendments	1
Sweet corn seed	1
Valerian extract	1
Vinegar – herb	1
Wheat juice Pdr.	1
White and red wine	1
Wine	1
Wine grape juice	1
Yak meat	1
Yak wool	1

Question 12: Use of claims or labels on organic and non-organic products in 2005.

Percent of total (N=83) using label	**Organic products**	**Non-organic products**
USDA logo	47	Not applicable
Organic certifiers logo	55	Not applicable
Global organic seal or logo	4	Not applicable
Sustainable agriculture	1	0
Socially responsible	33	0
Eco-label (environmentally friendly)	2	0
Natural	5	2
Regional or local	25	2
Free-range or pasture based production	10	1
Other labels	12	1

Description of other labels used on organic products (specified) – mentioned 1 time each
"Organically grown herbs"
Colorado Proud (mentioned 2 times)
Colorado Potatoes
Kosher
Private label

Description of other labels used on non-organic products (specified) – mentioned 1 time each
Grass-fed
"Grown without chemicals from untreated seed"

Note: 58 respondents answered that they did not use claims or labels on any of their products in 2005. Percent reported includes missing/non-response in the denominator; for some, non-response was quite high.

About Marketing

Question 13: Percentage of total 2005 organic sales marketed as fresh product and/or processed or value-added product.

Type of product (N=114)	Minimum	Maximum	Mean	Std. Deviation
Percent marketed as fresh product	0	100	77.17	36.896
Percent marketed as processed or value-added product	0	100	20.60	35.156

Percent reported marketed as fresh product	Frequency	Percent	Valid Percent
0	12	8.5	10.5
3	2	1.4	1.8
13	1	0.7	0.9
15	1	0.7	0.9
20	1	0.7	0.9
25	2	1.4	1.8
28	1	0.7	0.9
30	1	0.7	0.9
33	1	0.7	0.9
35	2	1.4	1.8
40	1	0.7	0.9
43	1	0.7	0.9
50	3	2.1	2.6
60	1	0.7	0.9
70	1	0.7	0.9
75	1	0.7	0.9
77	1	0.7	0.9
80	1	0.7	0.9
90	4	2.8	3.5
92	1	0.7	0.9
95	1	0.7	0.9
96	1	0.7	0.9
98	2	1.4	1.8
99	1	0.7	0.9
100	70	49.6	61.4
Total	114	80.9	100.0
Missing	27	19.1	
Total with missing	141	100.0	

Percent reported marketed as processed or value-added product	Frequency	Percent	Valid Percent
0	74	52.5	64.9
1	1	0.7	0.9
2	1	0.7	0.9
4	1	0.7	0.9
6	1	0.7	0.9
10	4	2.8	3.5
15	1	0.7	0.9
20	1	0.7	0.9
30	1	0.7	0.9
35	1	0.7	0.9
40	1	0.7	0.9
50	6	4.3	5.3
65	2	1.4	1.8
67	1	0.7	0.9
70	1	0.7	0.9
72	1	0.7	0.9
75	2	1.4	1.8
80	1	0.7	0.9
87	1	0.7	0.9
100	12	8.5	10.5
Total	114	80.9	100.0
Missing	27	19.1	
Total with missing	141	100.0	

Question 14: How respondents' organic products are sold, by total of 2005 gross organic sales.

Types of Markets (N=133)	Minimum	Maximum	Mean (gross organic sales)	Std. Deviation
Consumer-Direct				
On-site (e.g., farm stand, U-pick)	0	100	7.3	20.2
Farmers' markets	0	100	15.2	28.2
CSA shares	0	65	1.3	7.6
Mail order/Internet	0	20	0.7	2.9
Other consumer direct	0	100	5.8	18.3
Direct-to-retail				
Natural food stores (cooperatives and supermarkets)	0	100	9.1	20.7
Conventional supermarkets	0	100	1.5	10.3
Restaurants/caterers	0	85	3.8	12.0
Institutions (e.g., hospitals, schools)	0	5	0.1	0.6
Other direct-to-retail	0	95	2.3	12.0
Wholesale markets				
Natural food store chain buyer	0	100	7.1	19.4
Conventional supermarket chain buyer	0	80	1.6	9.6
Processor, mill, or packer	0	100	23.9	40.5
Distributor, wholesaler, broker or repacker	0	100	14.3	30.1
Grower cooperative	0	100	1.6	10.8
Other wholesale	0	100	4.0	18.8

Other marketing avenues specified by respondents.

Other consumer-to-direct specified
Alfalfa to feed lot
Buying clubs
Consumer buys on farm
Farm to home freezer
Festivals
Finisher
Fresh herbs to herbalist
Hay Broker
Live beef
Local orders to friends (mentioned twice)
Presales delivery
Private network
Seed - to other growers
Specialty shows
Other direct-to-retail specified
Bakeries
CSA - Fruit shares
Direct to dairy (feed)
Feed store
Liquor stores
Organic cider producer
Spas
Rancher
Other wholesale specified
Bulk grapes
Dairy
Direct to other producers
Farmer - dairy
Garden centers
Sell wholesale to high end interior design retail outlets
Individual herbalists
Private packer

Question 15: Percentage of 2005 gross organic sales that were transported to points of sale that were:

Percent of 2005 gross organic sales transported to points of sale (N=130)	Minimum	Maximum	Mean	St. Deviation
Local / regional (within the Four Corner States and neighboring states)	0	100	80.4	35.2
National	0	100	16.1	32.3
International	0	50	1.9	8.7

Question 16: Reasons why the respondent does not sell as much of his/her product locally or regionally as he/she would like.

1st year of production - thus limited marketing - too far from markets until larger variety.
All of our sales are regional - lack of distribution to certain areas.
Cattle were not certified - only pastures, & we produce beef so none of our sales were organic. Also, lots of competition locally in beef. (Other certified organic - not 'local', lots of 'natural')
Chain stores are exactly like Wal-Mart! Almost impossible to get into except by selling into their in house distribution network for cheap!!!

Demand for apples, pears, peaches, sweet cherries, etc. has been strong locally especially through City Market/King Snoopers. Our marketing program formerly geared toward more national markets has lately been focused more right here in Colorado.
Farmers/growers contract with us to grow specific organic crops.
Few people in Utah are willing to pay the added price for organic.
Good farmers markets are hard to find and hard to get into
I think there are a lot of local growers.
Just starting to enter the market.
Lack of marketing skills, inexperience. Resistance to higher price of organic products. Distribution logistics. Distance to other markets & fuel costs.
Lack of organic beef processor
Limited supply, limited water
Little interest in killing organic lamb and keeping it frozen until needed!
Local competition (established markets), National competition (WA/Calif. - Large farms)
Local sales market "small market"
Market is larger than my ability to produce
My processor sells nationally + internationally
My product is very perishable and I would prefer to sell it locally, however, our customer base is too small. If a city of 700,000 cannot support a few dozen organic farmers, then a huge education/advertising campaign needs to be implemented.
Natural Food Store Chains are very hard to work with
Need to scale up, need more labor, more time. Market is not saturated yet.
No local markets available for great amounts of wheat or alfalfa.
No local markets available (mentioned 2 times)
No market for pears & apples locally
Not enough money to offset the Organic Certification fees
Region does not support locally grown products
We are in a rural area and have to travel far.
Salesman tells us where to pack/deliver to.
Small City. No Demand.
The market opportunities are greater elsewhere.
There are no organic dairies in area
There are no refrigerated transportation vehicles available to link w/ AZ + CO.
This area is economically depressed; folks don't have much money to spend. Low population
This is my first year as an organic producer - have not established program as of yet
We are 150 miles away from the front range - so I market to mills
We can't deliver much further than a 250 mile radius + get back without an overnight stay, which adds a lot to the delivery costs.
We certify with IFOAM & BioSuiss - these certification don't seem to impress local buyers - even though their standards are stricter than NOP.
We farm near an air force base and we are no longer permitted to bring people to our farm.
We have to ship our wheat 400 miles to an organic mill; the freight takes 1/2 the profit of being an organic farmer. We need a market closer to our home.
We lack an organic kill & processing facility.
We need greater accessibility in advertising
When we have a good apple crop, others around us have good apple crop which is more competition.

Question 17: Description of producer-involved marketing effort/cooperative of which respondent is a member (and number of times reported).

Description of Marketing Effort or Cooperative	Frequency reported
NM Apple Council. They are beginning to get apples into the schools	1
Alb Area Growers Markets, Los Alamos FM, NMFMA	1
Belong to COPA (Colorado Organic Producers' Association) & NAFDMA (North American Farmers' Direct Marketing Association)	1
Beneficial Label - Southern Colorado/Northern N.M., small local label comprised of small	1

local farmers	
Boulder County Farmer's Market	1
Colorado Apple Administrative Committee.	2
Colorado Crop to Cuisine	1
Farm Fresh (Legacy) Marketing Coop.	1
Farm Fresh Direct LLC in Monte Vista	1
Farmers market.	1
Sell to and am a member of the local food coop in our city.	1
Mountain View Harvest (Wheat Growers + Bakery COOP) Non organic at present.	1
New Mexico Organic Commodities Commission	1
New Mexico Organic Livestock Coop	4
NM Herb Growers Assc., Local Harvest	1
New Mexico Dept of Agriculture Marketing	1
Organic Trade Association	1
Rio Grande Beef Alliance	1
Rogers Mesa Fruit - operates as proprietary broker, but functions co-operatively in nature.	3
Santa Fe Family Farmer's Cooperative	2
Santa Fe Family Farmers' Market	3
Pojoaque Farmers' Market	1
Small Farmers Cooperative Marketing in Northern New Mexico + Southern Colorado - includes a buying club	1
Taos Farmers' Market - Taos, NM. Dixon Farmers' Market - Dixon, NM	1
Tres Rios Coop	2
Valley Organic Growers Association	1
We have worked within our collective coop to help each other with distribution & farmers markets	1

Question 18: Interest in entering or expanding into specified markets over the next 5 years.

Types of markets (N=141)	Very interested	Moderately interested	Slightly interested	Not interested	Missing
			Percent		
Consumer-Direct					
On-site (e.g., farm stand, U-pick)	19.1	8.5	12.1	14.9	45.4
Farmers' markets	19.9	12.1	6.4	14.9	46.8
CSA shares	6.4	7.1	8.5	19.9	58.2
Mail order/Internet	15.6	9.9	5.7	22.0	46.8
Other consumer direct	5.7	2.8	0.0	0.0	91.5
Direct-to-retail					
Natural food stores (cooperatives and supermarkets)	31.9	12.8	4.3	11.3	39.7
Conventional supermarkets	9.2	10.6	5.7	23.4	51.1
Restaurants/caterers	15.6	13.5	8.5	14.2	48.2
Institutions (e.g., hospitals, schools)	5.7	6.4	9.2	24.1	54.6
Other direct-to-retail	0.7	0.7	0.7	0.0	97.9
Wholesale markets					
Natural food store chain buyer	22.7	11.3	4.3	17.7	44.0
Conventional supermarket chain buyer	10.6	9.9	3.5	22.0	53.9
Processor, mill, or packer	22.0	5.0	6.4	22.7	44.0
Distributor, wholesaler, broker or repacker	17.7	7.1	5.7	20.6	48.9
Grower cooperative	10.6	7.8	11.3	17.7	52.5
Other wholesale	5.0	0.7	0.0	0.0	94.3

Other markets specified by respondents.

Other consumer--direct specified
Agri-tourism
Buying clubs
Churches, clubs, fundraisers
Direct order & delivery
Direct sales
Farm market store
Farm to Home
From home
Phone/Mail
Remote tasting rooms
Route truck
Seed
Other wholesale specified
Alfalfa for dairy
Expanding garden centers
Local stores buy local - legislation!
Organic beef, dairy feed
Organic dairies
Other organic producers
Ranchers

Question 20: Interest of respondents in taking part in the following possible *new* marketing initiatives for organic products.

Types of new marketing initiatives (N=141)	Very interested	Moderately interested	Slightly interested	Not interested	Missing
			Percent		
Producer-involved value-added/processing facility	19.9	24.1	11.3	18.4	26.2
Producer-involved distribution operation	19.1	22.0	17.0	14.9	27.0
Producer-involved transportation network	20.6	34.1	12.1	18.4	24.8
Producer-involved marketing effort	28.4	21.3	17.0	10.6	22.7
Statewide direct marketing associations	19.1	22.0	18.4	16.3	24.1
Label/marketing program for local/regional products	20.6	16.3	14.9	16.3	31.9
Farm-to-school	16.3	12.1	18.4	21.3	31.9

Question 21: Rating by respondents of whether the following aspects create a problem when marketing organic products.

Possible problems with marketing of organic products (N=141)	Major problem	Moderate problem	Slight problem	Not a problem	Missing
			Percent		
Meeting specifications (e.g., delivery time, packaging)	5.0	11.3	15.6	49.6	18.4
Meeting quantity requirements	9.9	14.9	21.3	40.4	13.5
Meeting consistency requirements	4.3	14.2	19.9	44.7	17.0
Communication issues (e.g., electronic ordering)	2.1	5.0	10.6	61.7	20.6
Contractual issues (e.g., poor agreements)	2.8	7.8	16.3	51.8	21.3
Problems with marketing (e.g., no expertise, no time)	9.9	19.1	18.4	36.9	15.6
Lack of consumer education about organic	9.2	17.7	19.1	34.8	19.1
Competition from large national producers	14.2	19.1	14.9	35.5	16.3

Other problems specified
Automated labeling required (barcodes)
Chains will not buy local! Need legislation.

Consumer education on eating fresh food 1 hour to cook in general	
Cost for spray	
Infrastructure support organic production	
Knowledge of product raised by distributor	
Labor	
Limited markets	
Location	
Not a big economical area	
Product development	
Seasonal producer	
Transportation costs	
Organic feed stuffs	

Question 22: Description of major recent challenges or barriers in selling organic products (both demand and supply issues).

Each response is provided individually, some may be mentioned more than once.

Major buyers less concerned with quality more concerned about low price. FDA statements involving health risks for organic sprouts/microgreens/salad mixes
One customer for 96 acres of alfalfa! Market farmers sell chili produce
1) New move to new farm, remaking farm. 2) Marketing
400 miles to nearest elevator
A huge demand for organic beef cannot be fulfilled because of no processor on Colorado Front Range. Grassfed beef being brought in from South America sours the consumers taste for good beef. Consumers don't know difference between natural and organic.
Accessing the high end markets our products (w/ high price point) require. We've made a lot of progress, but it's been challenging and has taken longer than anticipated.
Available Markets. Large producers flooding markets and dropping prices.
Being able to go to Europe with the product
Can't meet demand – have labor and time issues with production
Cannot keep up with demand (mentioned 5 times)
Cannot supply the local demand, limited on water and land for operation.
Competition from Cal Organic
Consistent buying from local buyers
Consolidation - (Huge violation of ANTI-TRUST laws) of stores - have eliminated small organic markets.
Consumer ED in local area. Time take to deliver produce, time not spent in field.
Correct bottling. Freight charges!!
Dairies that are organic and require organic alfalfa
Demand for organics @ farmers markets on Southern end of NM is nil. Solved this buy starting CSA. Still do one farmers market but can't really compete with conventional farms. 2005 was an off year for vegetable crops due to disease & weather. One other m
Demand for product is year round and we are a seasonal supplier
Demand outstripping supply. Hard to get farms to certify because of the 3 year waiting period.
Not enough demand within 200 miles Not enough money to offset the organic fees
Destructive weather events
Education of public on the need for my products for digestive and cardiovascular wellness. Need for high altitude products.
Extensive record keeping requirements
Federal regulatory impositions - I.e. FDA
Finding a market
Finding an organic milling facility closer than 400 miles.
Finding dependable buyers

Finding enough markets. Lack of enough companies wanting to sign contracts for product.
Finding good farmers markets
Finding markets for organic products – pinto beans and other crops
Finding trucks
Fluctuating demand. Larger packers cutting price to maintain market share.
For personal (family) reasons - curtailed production for last 3 years
Getting my fruit to market - either wholesale or retail
Getting word about our product to customers. Tremendously high cost of processing. Transportation. Information in to us on dealing w/ such issues.
Getting word to other organic producers about our organic feed. (I.e. Dairy, Livestock, egg producers)
Harvest window too narrow. Not enough time to make deliveries.
Hay not being dairy quality
I recently lost the only organic meat processor in New Mexico and had to get a plant in Arizona to become certified organic./There are very few certified organic meat processors in the 4 corners
If we grow something to harvestable size and the quality is ok we can sell it. Either a restaurant takes it or we bring it to market and it sells. Finding varieties that do well in our conditions is a big challenge.
Information about organic mills and buyers of organic grain.
It has been a challenge to educate the consumer on why they should spend more on my product than the conventional product. Also educating the meat managers on the difference between organic and nonorganic.
Labor is single largest problem. If labor was available could increase gross 10 fold.
Lack of humane facility for slaughter, processing and storage, distribution to growing demand.
Lack of knowledge on consumers' part regarding organic products. Need more education on this.
Lack of local competition
Large producers at national level set market price for locally grown produce. Marketing direct to consumer has very high cost.
Last year pest challenges. Most of apple crop went into cider for own use.
Limited production
Limited production, labor, need new refrigeration
Low prices
Loyalty - the organic chain stores - Whole Foods, Wild Oats, Vitamin Cottage have been buying more from outside Colorado especially Washington State. We were in these markets before price pressure from large producers out of state took our market share.
Marketing always has been & will continue to take up far too much time
Marketing in local markets
Markets are limited; can't sell all of my product. Problem just surfacing.
Maximizing our space for inventory during our busy season to have enough inventory for a 1 1/2 month period. The rest of the year it's not an issue.
More buyers
My organic challenges are no different from every farmer in the U.S.A.
National organic peach price dips below Colorado conventional market at peak of season. Lack of consumer loyalty outside of region.
No demand
No premium for safflower
No processing facilities in NM. Shortage of feed stuffs (organic) because of competition from the dairy industry.
Not enough supply
Not many people or money around
Our cost is high therefore so is our price. Access to larger chain stores is difficult. Lack of education on the part of consumers. Competition w/ non organic products.
Our farmers' market allows resale. I wish that there was another option here. The big store that sells organic produce can get higher prices than we can at market. We are not drawing the right crowd.
Packaging has not been competitive on the shelf. Not enough time to personally contact potential stores + then following up. Lots of competition, lots of other products.
Price - inability to command cheaper co-packing costs or volume packaging buys thus creating higher wholesale prices. Distribution.

Price
Product comes in from other countries for less than we can grow it.
Protein in our wheat is low sometimes. We only have one buyer.
Quality of my wheat (I.e. low protein). Weather patterns (drought, etc.) and pests create growing season challenges.
Quality of product vs. receiver standards
Railroad!! Hard to get cars when & where.
Reaching a distribution chain outside my local delivery area
Refrigerated transport & storage to front range markets
Retail stores place unreasonable margins on small producers
Seed
Since the cost of fuel has gone up so radically, distributors want larger quantities shipped less often. We've historically shipped smaller orders, but more often so we are facing production + storage issues.
Small farm operation hard to get qualified part-time labor. Also due to size of operation, I end up doing everything and am spread too thin during harvest season.
Struggling to meet and sustain high nodes of growth. Having the staff in place to meet these demands.
Supply & demand - poor prices. New markets.
Supply: (post control limited by organic -) including birds, squirrels. *Transportation. Demand: not enough distinction (demand) for organic vs. "natural" or conventional/and cheap out-of -state product - large WA/CA farms.
The major problem I have is the relatively short harvest season - when I have tomatoes and beans, the whole world has tomatoes + beans.
Time
Timing, correct markets.
Too new to assess at this stage
Transportation and fuel costs!
Unbonded buyers who don't pay for products delivered to them
Understanding consumer demand for various products. Lack of consumer education about the diversity of product possibilities.
UPC labels for products
We can raise organic lamb off the mountain but can't find someone who might kill off the mountain and freeze lamb to be used as needed. All want fresh lamb on an all year round basis.
We don't have a problem selling organic at all. Actually we cannot fill the demand, however, we do not want to grow (expand) our growing as that entails hiring help. We would rather recruit other growers or farmers to grow.
We would like more people to visit on site to buy.
Weather (drought) – mentioned 2 times.
Weather conditions. We have been in a drought and each year the water is questionable. The other barrier (major) is lack of customers at the Farmers' Markets.
Weather has reduced supply over the past couple of years.

Question 23: Description of new trends or opportunities respondents perceive in the market for organic products currently produced by the respondent.

Each response is provided individually, some may be mentioned more than once.

A trend to feed our families organic foods is something that may help pay for organic methods
Added health benefits to colored flesh potatoes
Agri-tourism because farm is small
Better opportunities in the organic hay market
Bigger demand
Buy Local, Consumers desire to "know the grower"
Buy local/regional. Fewer ingredients. Quality/flavor.
CSA's in Southern NM are a relatively untapped market. Our herb sales are slowly growing but require much more marketing to retail. We can wholesale almost all we produce. The Chinese Medicinals are a new market that is showing great promise. Also school

Decrease in demand and marketing opportunities
Deeply concerned regarding corporate takeover + redefinition of organic.
Demand for local and locality-identified produce within the region is growing rapidly. Demand for direct farm experience is growing also. These trends are larger than the demand for organic, but being organic enhances consumer involvement.
Direct market majority of products to consumers through CSA & Farmers' Markets.
Direct sales to restaurants - though risky because chefs do not last, are picky and need more than we can produce on a more regular basis. Also CSA cooperatives so consumers can get it all at one spot.
Farmers markets and agri-tourism are the most exciting ways and opportunities to sell direct to retail customers - the fruit reaches customers at the peak of maturity & freshness - Happy Consumers = Profitable Farmers
For peaches, demand is growing faster than the supply. Unfortunately, pears are more of a challenge.
Great opportunity 20% growth.
Growing time extension.
Higher quality constraints
Hopeful of a good market for lower protein wheat.
Hopefully the wholesale market will develop into a substantial part of our business.
I am interested in developing an Internet direct purchase and delivery program.
I see us losing market share if we can't get larger. There are fewer and fewer small stores and customers surviving.
I think that future marketing will trend toward direct producer, processor agreements. The middle man will be eliminated or minimized.
Increased demand as people reject industrialized agriculture. Consumer will want to know where their food comes from, and will buy locally if possible.
Increased media articles on benefits of organic food are creating greater organic food demand.
Increasing competition from agri-producers who have entered market for organic produce.
International markets
Lack of supply to markets
Large demand and access to large volume markets and meeting their volume demands.
Local awareness of our product has improved
Locally grown
Locally grown food is perceived to be more safe and the local communities have expressed an interest is supporting local small farms. Name and label recognition and providing a year round supply will be both challenges and opportunity.
Looking at a large scale (possibly moveable) greenhouse to extend season.
Market growing strongly in Boulder. We sell out almost every week.
Marketing is easy
More awareness of benefits and availability of organic produce, grains, etc.
More people moving in - and more awareness
More production going to organic. Keeping ahead with certified organic greenhouses.
More visits to the farm
Moving toward Heirloom Tomatoes, I have grown heirlooms for 4 years and can not produce enough even with heavy producing varieties. Have found higher prices do not discourage consumers.
Natural seems much more accessible to sell than organic
Need to get more marketing opportunities.
Not many unless more effort to change consumer habits
Organic dairy
Organic hay can only get better
Our local community has been disinterested in organic and the types of herb and specialty vegetables that we grew in the past, but interest is now increasing. We hope this makes our recent start of a farm stand viable and the possibility of a CSA in the near
Our market will handle more than 2x increase in product volume. Need to keep consumer prices realistic.
Overall finally getting the USDA stamp will help us (everybody) more than anything
Packing product in ready to eat containers
Processed potatoes
Producer - involved marketing effort.

Promotion of local organic beef.
Public awareness of benefits of organic growing, both for their health and the health of the planet. Education regarding nutrition benefits in micro-greens & wheatgrass
Repack and direct sales
Restaurants are easy to sell to and can pay good prices 3/4 of retail for product. Late in 2004 we sold to 2 we are now up to 10. We produce things like colored carrots, unusual radishes and cucumbers. These are not available from anyone but us and chefs
seems to be more interest in organic food production
Sky is limit - more demand from consumers for artisan, organic, craftsman - local produced products
The demand for organic is increasing by leaps. Currently, a neighboring Indian Pueblo wants organic produce for their 3 restaurants and a store. The local schools are crying out for local + fresh produce. We cannot meet the demand.
The increasing consumer interest for locally/regionally grown/produced products.
The interest is growing daily. Organic knowledge and education are much more wide spread in all age groups.
The large companies are going into organics, and the small producer is going to have to work hard to show how small and local are our selling points. Grower to customer relationships are the key.
The schools, hospitals & other health care institutions may become customers w/ further education
There seems to be a larger demand for organic alfalfa hay. I will work to expand this market.
Trend is increased demand for org + "clean" skin care products. Increased government regulations making it harder for small companies to stay in business.
Value Added
We are a growing population. I expect this to mean more customers.
We have certified USDA and soon will have organic certification for local beef processing facility. This may open some markets.

How Respondents Get Information and Services

Question 24: The usefulness of the following information sources in assisting with organic production in 2005, as rated by respondents.

Information Sources, Production (N=141)	Very useful	Moderately useful	Slightly useful	Not useful	Missing
		Percent			
Other producers	29.8	27.7	17.0	11.3	14.2
Cooperative Extension	14.9	15.6	24.8	29.8	14.9
State Department of Agriculture	15.6	19.1	24.8	27.7	12.8
Sustainable Agriculture Network (SAN) or SARE	5.0	14.2	22.0	36.9	22.0
Internet	19.9	23.4	12.8	24.1	19.9
Associations or non-profit organizations	5.7	15.6	18.4	40.4	19.9
Conferences or workshops	19.1	24.1	17.0	24.1	15.6
Newsletters/Trade Magazines	14.2	20.6	27.7	22.0	15.6

Other information sources specified
ATTRA
Certifying Agency
Horticultural textbooks
Industry specialists
NMOCC
Our local certifying agency.
People who sell organic products
Stockman grass farmer
Visits to California organic wine growers
Warehousemen

Question 25: The usefulness of the following information sources in assisting with the marketing of organic products in 2005, as rated by respondents.

Information Sources, Marketing (N=141)	Very useful	Moderately useful	Slightly useful	Not useful	Missing
			Percent		
Other producers	17.7	19.1	22.7	22.0	18.4
Cooperative Extension	4.3	7.1	16.3	53.9	18.4
State Department of Agriculture	9.9	12.1	19.1	41.8	17.0
Sustainable Agriculture Network (SAN) or SARE	2.8	5.0	17.0	51.8	23.4
Internet	11.3	12.8	16.3	39.7	19.9
Associations or non-profit organizations	6.4	7.1	19.9	44.7	22.0
Conferences or workshops	7.8	12.1	19.9	39.0	21.3
Newsletters/Trade Magazines	5.0	15.6	20.6	37.6	21.3

Other marketing information sources specified
Broker registers
Brokers
Friends
Knocking on doors
Marketing door to door, cold calls, farmers' market
Organic contacts
Our own research, talking to restaurants, etc.
Personal contacts in restaurant industry.
Stockman Grass Farmer
Sunland Peanuts Inc.
Word of mouth.

Question 26: Three specific information sources found most helpful to respondents in either organic production or marketing *(Number of times reported)***.** Some responses have been combined in frequencies when not unique.

Information source	Frequency reported
"Growing for Market" Newsletter	2
"Natural Home + Garden" Magazine	1
"Organic food producer" (magazine)	1
ACRES Conf.	1
Acres USA	6
Adrian Card - Bldr. Co. Extension	1
Ag chemical supply Co representative	1
Association thru other businesses	1
ATTRA	4
Books/Magazines/Internet	1
Buyers	2
Certain Books on cultivation of mushrooms	1
Clients word of mouth	1
Coleman RODALE pubs on organic production	1
Colo. Dept. Ag. Organic Inspector	1
Colo. Dept. of Ag.	2
Commercial organic orchards in our county	1
Commercial organic vineyards and wineries visited in California	1
Conferences	2
Conferences/workshops, Experienced speakers with know how of pecans	1

Conferences/workshops./Quivera Coalition	1
Cooperative Extension Service	6
County Extension Agent	1
Crop Consultant	2
Crop Services International - Michigan	1
CSU Agricultural Research Stations - Orchard Mesa, Rogers Mesa.	1
CSU CE (Cooperative Extension)	1
CSU Website/Cooperative Extension	1
Current contacts for marketing.	1
Customers	1
David Gordon - Colo. Organic Inspector	1
Demeter Assoc. Bio-Dynamic	1
Denise Pribble - Adobe Milling, Dove Creek, Colo.	1
Distributors - the buyers we work with	1
Eating Well	1
Elliott Coleman books + visit to his farm.	1
EU journals	1
Farmers' Markets	3
Fertilizer company supplier - Larry Traubel	1
Food Coops	1
Frank Stonaker - CSU	2
Fruit Grower News - Growing & Marketing	2
Good Fruit Grower - Production & some marketing	1
Good Fruit Pub	1
Grand Mesa Discount, Cedar Edge, Colo.	1
Grass farmer	1
Growers meetings	1
Growing for Market	4
Hay buyers	1
Herbalists and lawyers due to selling medicinal organic product	1
Holistic Mngt. International	1
Industry specialists	1
Info in various organic gardening catalogs.	1
International Fruit Tree Assoc.	1
Internet research	16
Johnny's Seed catalogue and website (johnnyseeds.com)	1
KCBOT	1
Key strategic marketing associations	1
Kids pages & CO Farm Fresh Directory	1
Listen to consumers	1
Local Brokers	1
Local Miller Processor (Adobe Milling Co.)	1
Local Organic Markets (Dairies)	1
Magazines	1
Marketers	1
My network of suppliers	1
NAFDMA Conference	1
Networking	1
New Mexico Organic Certification Commission	1
New Mexico Organic Commodity Commission (NMOCC)	6
New Mexico Organic Growers Conference	2
Newsletters	1
NM Apple Council	1

NM Organic Commodities annual ed conf.	1
NM Organics Conference	1
NMSU Research Farm in Alcalde, NM	1
Northern Utah Organic Group (OCIA certification chapter)	2
Nutrient Requirements of Poultry	1
OCIA news letters	1
OCIA organic inspectors	1
OMRI	3
Organic Business News	1
Organic Farming Conference	1
Organic Gardener (the periodical)	1
Organic packing shed	1
Organic seed + supply catalogues + companies	1
OTA - Organic Trade Association	2
Other growers/farmers	28
Our local organic conference	1
Outdoor signage	1
Peaceful Valley Farm Supply	2
Personnel	4
PMA Conferences	1
Private sources - esp. in central CA	1
Public Library	1
QAI	1
RBCS or Blue Book (Info source technology)	1
Rodale	1
Ron Godin, CSU Rogers Mesa Research Facility	2
Sales reps	1
SARE Publications	2
Seed Catalogs	5
Seth Winterton, Utah	1
SLV Potato Grain Conference	1
Soil Food Web workshops	1
State Dept. of Agriculture	5
State of Colo. Guidelines	1
Steve Diver's ATTRA website	1
Stockman Grass Farmer	3
Stockman Grass Farmer Conferences	1
Sunland Peanuts Inc	1
Suppliers	1
SWMN Conference	1
Taos Farmers' Market Newsletter	1
The New Farm (newfarm.org) website	2
Third person sale (reputation)	1
Trade magazines	1
USDA	1
USDA market reports	1
USDA NOP book and website	2
Utah State	1
Vegetable Grown	1
VOGA meetings	1
Washington State USDA website	1
WCHS Conference	1
Web - IPM UC Davis	1

Western Garden Book	1
Western Horticultural Conference	1
Wheatland Milling - Collinston Ut., direct communication works best	1
Word of mouth	4
Workshops	1
Workshops put on by ALCALDE RESEARCH STATION	1
Workshops put on by Small Business Bureau	1

Question 27: Organizations related to producing and/or marketing organic products which the respondents are members.

	Frequency Reported
American Herbalist Guild	1
Beneficial Farm + Ranch Coop, New Farms N.M.	1
Blue Book Services, RBCS	1
Boulder County Farmer's Market	3
CCOF	1
Colo. Organic Assoc.	1
Colo. Organic Certifying Program	1
Colorado Greenhouse Grower Assoc., United Plant Savers, Seed Savers Exchange	1
Colorado Proud	1
COPA (Colorado Organic Producers)	9
Colorado Organic Crop Mgmt Assn.	1
International Tree Association	1
Del Valle Pecans + Sun Gro	1
Farm Fresh Direct	1
Farmers' Market Assoc.	1
International Dwarf Tree Assoc., Western Pest and Disease Mgnt., Organic Farmers Research Fdtn., Rocky Mountain Farmers Union, Colorado Crop to Cuisine, Western Colo Horticultural Society	1
Kansas Organic Producers	1
Live Earth Products	1
Local Harvest	1
Mesquite Organic Grassfed Beef. Rio Grande Beef Alliance	1
North American Direct Marketing Association	4
WCHS, NPC	1
New Mexico Herb Growers Assn. NMHGA	2
New Mexico Organic Commodity Commission	7
Shopnatural coop	1
NM Apple Council	1
NM Farmers Marketing Assn.	1
NM Organic Livestock Co-op	3
Northern Utah Organic Group	2
OCIA	4
Wheatland food Group	1
NEB #2	1
Organic Trade Association	5
Rocky Mountain Vitneis + Viticulturalists	1

Santa Fe Family Farmer Coop	2
Sustainable Ag. Association of the Bear River Area	1
USDA NOP	2
Utah State + QAI	1
Valley Organic Growers Assoc.	4
Delta Chamber of Commerce	1

Operation and Producer Characteristics

Question 28: Age of respondent

	Minimum	Maximum	Mean	Std. Deviation
Age of respondent (N=133)	22	81	50.9	11.5

Question 29: Gender of respondent

Gender	Frequency	Percent
Male	105	74.5
Female	30	21.3
Total	135	95.7
Missing	6	4.3
Total with missing	141	100.0

Question 31: Business structure of respondent's operation.

Structure of business	Frequency	Percent
Single family	78	55.3
Family partnership or corporation	46	32.6
Partnership or corporation, non-family	7	5.0
Cooperative	0	0.0
Property management	0	0.0
Educational/research operation	1	0.7
Total	132	93.6
Missing	9	6.4
Total with missing	141	100.0

Question 32: Number of full-time (40 hour/week) employees (including respondent and family members) employed in 2005.

	Minimum	Maximum	Mean	Std. Deviation
Full time employees employed (N=139)	0	190	6.7	19.9

Question 33: Operation's gross sales amount in 2005 from all product sales and activities.

Gross Sales Category	Frequency	Percent

Less than $2,000	5	3.5
$2,000-4,999	3	2.1
$5,000 - 14,999	17	12.1
$15,000-29,999	17	12.1
$30,000-49,999	11	7.8
$50,000-99,999	19	13.5
$100,000-249,999	23	16.3
$250,000-499,999	17	12.1
$500,000-999,999	7	5.0
$1 million or more	12	8.5
Total	131	92.9
Missing	10	7.1
Total with missing	141	100.0

Question 34: Percentage of operation's net farm income attributed to organic products.

Percentage of net farm income from organic products	Frequency	Percent
Loss from organic	8	5.7
0-19%	13	9.2
20-39%	16	11.3
40-59%	10	7.1
60-79%	8	5.7
80-100%	80	56.7
Total	135	95.7
Missing	6	4.3
Total with missing	141	100.0

Question 35: Did the respondent's operation have sales from agri-tourism related activities (e.g., education tours, Bed & Breakfast, pumpkin patch, hay rides, flower, craft, or ornamental sales) in 2005?

	Frequency	Percent
Yes	16	11.3
No	120	85.1
Total	136	96.5
Missing	5	3.5
Total with missing	141	100.0