

The Potential of Value Added Organic Produce in the Mainstream Marketplace



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ISS Institute /TAFE Fellow

Fellowship funded by
OTTE
Victorian Government



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Executive Summary

Access to organic foods and the means in which they are presented has been a focal point in Australia for many years. This report not only focuses upon raw organic products, but also seeks to investigate whether easier access to convenient value added organic foods would result in a definite trend towards an increase in the use of these products. Within this context consumers would have a larger product choice without having to worry about processing raw product from scratch.

Widening knowledge and attitudinal change towards the benefits of organic produce will assist in the development of a healthier lifestyle; promoting new food ideas and habits in a new generation of consumers. The promotion of how the consumption of organic based food products can better our lifestyle by developing not only our mental but also physical traits is important, and this can, and will, lead to a brighter and healthier outlook for generations to come.

The term natural/organic is part of a current marketing dilemma. When “organic” food is mentioned, the initial perception is that it is a costly product grown by alternative lifestyle producers. The term “Natural/organic” may be a way of counteracting that perception. Using the term “natural/organic” would mean chemical free with organic origins.

Facilitating access to, and developing a basic understanding of the benefits of these products is pivotal for this point to take effect across the population. Today’s world is characterised by a fast paced generation where convenience is high on the lifestyle agenda. Developing value added organic products (eg: heat and serve) to compete in the convenience market and promoting the benefits of these products will contribute to changing Australians’ eating habits.

The primary aim of this fellowship was to investigate ways to value add to organic produce and expand an understanding of how to market and sell these new products to larger food chains. Following are a series of skills and knowledge areas to be investigated as a part of the fellowship:

Value adding to our regional organic produce

Investigate best practice examples for increasing the value of organic produce through the process of up-selling organic products. Up-selling involves value adding to organic produce by taking organic products from their raw state to one which has been processed; products such as: a paste, grinds, frozen, dehydrated and blends.

Development of these organic products developed and sold in different forms will generate new market potential. Finding a profitable and functional model to do this is paramount to getting it right the first time and hence avoiding wasting time and money in futile exercises.

There is potentially a niche market for restaurants that are willing to develop the concept of “value adding” further. Participating restaurants could be promoted as part of the local/international tourist industry for that region and could feature ‘the valued added’ produce as part of their menu. This would help boost the local/international economy and provide an opportunity to put back as such; nurturing and growing the organic trade.

Developing knowledge to help extend regional organic produce's shelf life

One major drawback with organically grown produce has been the lack of shelf life for these products both vegetable and animal. Many common goods that we stock in our

Executive Summary

pantries and fridges are chemically enhanced with many synthetic preserving agents that “keep” our food longer on the supermarket shelf, therefore finding methods of preserving, snap freezing or processing without the use of synthetic preservatives is another reason to value add to organic foods.

Improving the farming systems of regional organic produce

The economic costs behind organically produced food has always been relatively high due to high costs involving the growing of the product, the labour involved in doing so, marketing (or the lack of it) of organically based products and general product information available to anyone who may be in, or looking at getting involved with organic farming. An investigation of ways and means of overcoming some of these issues would result in savings that could be passed onto the consumer and additionally, a rise in the consumption of organic foods and better monetary return to the producers. This would then create a “win/win” scenario.

In order to obtain best practice information, a series of visits were organised to sites in the United States who have become leaders in this field. Visits to three major natural/organic wholesaling chain stores in the US were undertaken to document best practice:

- Albert’s Organics – Denver, Colorado – Jim Hagen, Store Manager
- Wild Oats Market Place – Superior, Colorado – Mike Burger, Store Director

In addition, two major farmers markets (one in Los Angeles and one in Denver) were visited to gather input to how they work with the local industries (restaurants etc...) and what part they play with the wholesaling chain.

- Old South Pearl Street Farmers Market – Denver, Colorado – Samantha Robinson, Market Manager
- Wednesdays Farmers Market – Santa Monica, California – Laura Avery, Market Manager

Specific activities undertaken to address skills and knowledge gaps included:

- Participating in a training program with a leading organic farm research institute.
- Investigating networking and mentoring opportunities with the USA and Australian producers.
- Looking at how farmers markets in the USA promote and move organic food into the mainstream.
- Looking at design and best practices for growing, harvesting, promoting and supplying organic food products to the major wholesalers.
- Looking at design and best practices for growing, harvesting and modifying organic food as value added products to the major wholesalers.

Following an overview of the fellowship experience and what knowledge was acquired, a series of recommendations are made to Government, Industry, and the Business sector, Professional Associations, Education and Training Providers, our Community and the ISS Institute.

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Acknowledgments

General Acknowledgment

Throughout the fellowship program I have encountered and relied upon various organisations and individuals to help and guide myself through the process of developing my overseas venture. I would like to thank those who supported me and willingly gave their assistance and expertise so I could develop this study program. I hope to share various insights from my research so others will benefit from my findings. It is anticipated that others will implement new information into worthwhile and valuable programs/working partnerships.

Thank you all for this moment.

Awarding Body - International Specialised Skills Institute (ISS Institute)

We know that Australia's economic future is reliant upon high level skills and knowledge, underpinned by design and innovation.

The International Specialised Skills Institute Inc (ISS Institute) is an independent, national organisation, which has a record of nearly twenty years of working with Australian industry and commerce to gain best-in-the-world skills and experience in traditional and leading-edge technology, design, innovation and management. The Institute has worked extensively with Government and non-Government organisations, firms, industry bodies, professional associations and education and training institutions.

The Patron in Chief is Sir James Gobbo AC, CVO. The ISS Institute Board of Management is Chaired by Noel Waite AO. The Board comprises Franco Fiorentini, John Iacovangelo, Lady Primrose Potter AC and David Wittner.

Through its CEO, Carolynne Bourne AM, the ISS Institute identifies and researches skill deficiencies and then meets the deficiency needs through its *Overseas Skill Acquisition Plan (Fellowship Program)*, its education and training activities, professional development events and consultancy services.

Under the Overseas Skill Acquisition Plan (Fellowship Program) Australians travel overseas or international experts travel to Australia. Participants then pass on what they have learnt through reports, education and training activities such as workshops, conferences, lectures, forums, seminars and events, therein ensuring that for each Fellowship undertaken many benefit.

As an outcome of its work, ISS Institute has gained a deep understanding of the nature and scope of a number of issues. Four clearly defined economic forces have emerged out of our nearly twenty years of research. The drivers have arisen out of research that has been induced rather than deduced and innovative, practical solutions created - it is about thinking and working differently.

A Global Perspective. 'Skills Deficiencies' + 'Skills Shortages'

Skill deficiencies address future needs. Skill shortages replicate the past and are focused on immediate needs.

Skill deficiency is where a demand for labour has not been recognised and where accredited courses are not available through Australian higher education institutions. This demand is met where skills and knowledge are acquired on-the-job, gleaned from published material, or from working and/or study overseas. This is the focus of the work of ISS Institute.

Acknowledgments

There may be individuals or firms that have these capabilities. However, individuals in the main do not share their capabilities, but rather keep the IP to themselves; and over time they retire and pass way. Firms likewise come and go. If Australia is to create, build and sustain Industries, knowledge/skills/understandings must be accessible trans-generationally through nationally accredited courses and not be reliant on individuals.

Our international competitors have these capabilities as well as the education and training infrastructure to underpin them.

Addressing skill shortages, however, is merely delivering more of what we already know and can do to meet current market demands. Australia needs to address the dual challenge – skill deficiencies and skill shortages.

Identifying and closing skills deficiencies is vital to long-term economic prospects in order to sustain sectors that are at risk of disappearing, not being developed or leaving our shores to be taken up by our competitors. The only prudent option is to achieve a high skill, high value-added economy in order to build a significant future in the local and international marketplace.

The Trades

The ISS Institute views the trades as the backbone of our economy. Yet, they are often unseen and, in the main, have no direct voice as to issues which are in their domain of expertise. The trades are equal, but different to professions.

The ISS Institute has the way forward through its 'Master Artisan Framework for Excellence. A New Model for Skilling the Trades', December 2004. The Federal Government, DEEWR commissioned ISS Institute to write an Australian Master Artisan School, Feasibility Plan.

In 2006, ISS Institute Inc. set up a new ISS advisory body, the Trades Advisory Council. Members are Ivan Deveson AO; Martin Ferguson AM, MP, Federal Labor Member for Batman; Geoff Masters, CEO, Australian Council of Educational Research; Simon McKeon, Executive Chairman, Macquarie Bank, Melbourne Office; Richard Pratt, Chairman, Visy Industries and Julius Roe, National President Australian Manufacturing Workers' Union.

Think and Work in an Holistic Approach along the Supply Chain - Collaboration and Communication

Our experience has shown that most perceive that lack of skills is the principal factor related to quality and productivity. We believe that attitudes are often the constraint to turning ideas into product and a successful business; the ability to think laterally, to work and communicate across disciplines and industry sectors, to be able to take risks and think outside the familiar, to share – to turn competitors into partners.

Australia needs to change to thinking and working holistically along the entire Supply Chain; to collaborate and communicate across industries and occupations - designers with master artisans, trades men and women, Government agencies, manufacturers, engineers, farmers, retailers, suppliers to name a few in the Chain.

'Design' has to be seen as more than 'Art' discipline – it is a fundamental economic and business tool for the 21st Century

Design is crucial to the economic future of our nation. Australia needs to understand and learn the value of design, the benefits of good design and for it to become part of everyday language, decision making and choice.

Acknowledgments

Design is as important to the child exploring the possibilities of the world, as it is to the architect developing new concepts, and as it is to the electrician placing power points or the furniture designer working with a cabinet-maker and manufacturer. As such, design is vested in every member of our community and touches every aspect of our lives.

Our holistic approach takes us to working across occupations and industry sectors and building bridges along the way. The result has been highly effective in the creation of new business, the development of existing business and the return of lost skills and knowledge to our workforce, thus creating jobs - whereby individuals gain; industry and business gain; the Australian community gains economically, educationally and culturally.

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Fellowship Sponsor - Office of Training and Tertiary Education (OTTE)

The Office of Training and Tertiary Education (OTTE) is part of the Department of Education and Training (DE&T) and is responsible for:

- Planning, buying and monitoring services offered by TAFE institutions, Registered Training Organisations (RTOs) and Adult and Community Further Education (ACFE);
- Leading and supporting the development of the higher education, Vocational Education and Training (VET) and ACFE systems.

OTTE plans, regulates and delivers a range of education and training programs and services in Victoria through:

- Nineteen publicly-owned Technical and Further Education (TAFE) institutions, including five universities with TAFE divisions;
- More than 450 community-managed Adult Community Education (ACE) providers;
- More than 1000 VET providers, of which about 350 are State Government funded and about 650 are privately funded;
- Victorian businesses and industries, which support more than 112,000 people in training.

Lethlean would personally like to give thanks to OTTE for providing the funding needed for this fellowship and hope that the partnership with the ISS institute continues for future fellows to experience and enjoy.

Individuals/Organisations/Companies Involved in the Development of the Overseas Program

- ISS Institute: in particular Carolynne Bourne AM and Jeanette McWhinney
- Athol Wark - owner/operator of Warkabout Consultancy and ISS fellow.
- Dr Paul Hepperly - Research and training manager, Rodale Institute, Kutztown, Pennsylvania
- Sharon Riker - Administrative assistant, Rodale Institute, Kutztown, Pennsylvania
- The Rodale Institute - Kutztown, Pennsylvania
- Jim Hagen: - Manager of Alberts Organics, Denver, Colorado
- Alberts Organics - Denver, Colorado

Acknowledgments

- Mike Burger - Store Director, Wild Oats Marketplace, Superior, Colorado
- Wild Oats Market Place - Superior (Colorado), Los Angeles, California, USA
- Krista Coleman - Marketing & Public Relations, Wild Oats Marketplace, Superior, Colorado Division, USA
- Whole Foods Market - Denver, Colorado, Las Vegas, Nevada, Los Angeles, California
- Stephanie Boulcher -Secretary to Old South Pearl Street Farmers Market
- Samantha Robinson - Market Mgr, Old South Pearl Street Farmers Market, Denver, Colorado
- Old South Pearl Street Farmers Market - Denver, Colorado
- Laura Avery - Market Mgr, Santa Monica Farmers Market, Santa Monica, California
- Santa Monica Farmers Market - Santa Monica, California
- Real Food Daily (organic/natural food) restaurant - Santa Monica, California

Individuals/Organisations Involved in the Fellowship Submission

- Kim Banfield – Commercial Cookery co-ordinator studies, Go TAFE, Shepparton
- Lindsay Short – An associate of the CLLEN community support program
- David Collins – Manager of HACS, BRIT, Bendigo
- Dr Louise Harvey – CEO, BRIT, Bendigo
- Michael Langdon – Former Senior Manager of Educational Services, BRIT , Bendigo
- Victorian Culinary Educators Network (VCEN) body
- Farmers Market – Echuca branch (inspiration)

About The Fellow

Brendan John Lethlean

Born in Tongala, Victoria on the 4/4/1967.

Lethlean settled into cookery as a way of life and a career in 1983 upon commencing an apprenticeship at the Echuca Hospital. Lethlean spent his training terms at the Gordon Technical College in Geelong and finished his apprenticeship in May 1987.

Lethlean has worked at various food establishments, varying from industrial size kitchens (in Melbourne) to 5 star resorts (In Cairns).

It was almost by accident that he fell into the vocation of teaching cookery studies and he has been working with the Bendigo Regional Institute of TAFE – Echuca campus for almost 8 years. In that time he has had great pleasure in seeing many budding apprentice cooks working their way through their chosen field of study to complete their own apprenticeship.

Over the last few years through his teaching and work in the catering industry he has become very interested in the quality and lifestyle associated with our eating habits. He has found that we need to look at what we are eating in order to change our habits of eating over processed or synthesised food products.

Lethlean feels as though we, as consumers, have lost the taste of “real” food. Organic products are not only good for you as a better alternative for your health, but bring back the taste of what food should taste and smell like.

The growing of organic products can be applied in your very own back yard. Not only does growing organically based food items at home increase a healthier eating lifestyle but we can use this to pass on knowledge to our children so as they have a vested interest in what we, as parents, are trying to pass on. Being practically involved in the organic food chain needs to be seen as an exciting and fun thing to be involved with.

Lethlean has lived in various states of Australia and currently resides in Northern Victoria in Echuca. He is married with three children.

Aim of the Fellowship

The primary aim of this fellowship was to investigate ways to value add to organic produce and expand an understanding of how to market and sell these new products to larger food chains.

Specific topics to be researched include:

- Knowledge regarding the process of value adding to our regional organic produce
- Knowledge to help extend regional organic produce's shelf life
- Information regarding improvement of farming systems for regional organic produce.
- Examining how farmers markets in the USA promote and move organic food into the mainstream food distribution chain and to consumers.
- Investigating design and best practices for growing, harvesting, promoting and supplying organic food products to the major wholesalers.

Australian Context

Promoting a healthier eating lifestyle in Australia through convenient access to organic food products

Access to organic foods and the means in which they are presented has been a focal point in Australia for many years. This report not only focuses upon raw organic products, but also seeks to investigate whether easier access to convenient value added organic foods would result in a definite trend towards an increase in the use of these products. Within this context consumers would have a larger product choice without having to worry about processing raw product from scratch.

Widening knowledge and attitudinal change towards the benefits of organic produce will assist in the development of a healthier lifestyle; promoting new food ideas and habits in a new generation of consumers. The promotion of how the consumption of organic based food products can better our lifestyle by developing not only our mental but also physical traits is important, and this can, and will, lead to a brighter and healthier outlook for generations to come.

The term natural/organic is part of a current marketing dilemma. When “organic” food is mentioned, the initial perception is that it is a costly product grown by alternative lifestyle producers. The term “Natural/organic” may be a way of counteracting that perception. Using the term “Natural/organic” would mean chemical free with organic origins.

Facilitating access to, and developing a basic understanding of the benefits of these products is pivotal for this point to take effect across the population. Today’s world is characterised by a fast paced generation where convenience is high on the lifestyle agenda. Developing value added organic products (eg: heat and serve) to compete in the convenience market and promoting the benefits of these products will contribute to changing Australians’ eating habits.

Developing and broadening the expertise of young chef’s knowledge to pass onto the consumer

The mainstream trend of heating and serving food that has been pre-cooked or over refined is quite entrenched in young ‘up and coming’ chefs. This emphasis can detract from their passion and the art of developing and producing food from a natural raw state.

While economics is a major factor in the choice of refined and pre-packaged foods, there is also scope to promote organic foods that are available to complement the “commercially prepared” products. The skill associated with producing menus with natural/organic products from scratch is an exciting and integral part of learning about food. Art and passion need to be promoted within the food industry if we are to attract highly enthusiastic people to the industry.

Consumer knowledge

It is important to raise awareness about the effects of consuming “fast food”. Propaganda and ill informed documentation is certainly not a way to showcase this. Recently there has been media attention towards the effect of how fast food is affecting our children’s lifestyle. This method of informing the population can be seen as a ratings grab by competing television networks. Concise, factual and neutral findings need to be researched and passed onto the wholesaler and consumer.

Part of the fellowship process will be obtaining information from wholesalers in the USA

Australian Context

as to how they work with their consumers and how they market the benefits of buying/eating organic food. This can be used as an exemplar for better prepared marketing of the fledgling Australian organic/natural food industry.

The need to investigate and follow up organic practices that are tried and true in the USA is quite paramount. The implementation of practices that are being used in the USA needs to happen ASAP.

The great concern is the health of our generation as well as of generations to come. We cannot expect to keep up the consumption of synthesised food varieties and not see a change in the genetic make-up of our children and our children's children. It's as important as that.

Such an investigation is timely with an increasing number of people looking at the alternative of eating healthier food to promote longevity and good health.

Organic Certification in Australia

There are a few major Australian organic certifiers that are currently operating in Australia. Australian Certified Organic (ACO) and National Association Sustainable Agriculture Australia (NASAA) are 2 major certifiers that are seen as the major players in organic certification here in Australia. Both ACO and NASAA have links with the USDA and utilise information from the USDA as part of their certification process.

Organisations to benefit from the overseas fellowship

Interstate and local private/government bodies associated with organic produce

- The National Association for Sustainable Agriculture, Australia (NASAA)
- Organic Growers of Australia (OGA)
- Biological Farmers of Australia (BFA)
- Department of Primary Industries – organic agriculture (DPI)
- Organic Federation of Australia (OFA)
- Biodynamic Agriculture Australia.

Organic certifiers that are in operation in Australia

- AQIS Australian Certified Organic (AQIS)
- Australian Certified Organic (ACO)
- Bio Dynamic Research Institute (BDRI)
- National Association Sustainable Agriculture Australia (NASAA)
- Organic Food Chain (OFC)
- Organic Growers of Australia (OGA)
- Organic Retailers and Growers Association Australia (ORGAA)
- Safe Food Queensland
- Tasmanian Organic Dynamic Producers (TOP)

Sourced from <http://www.theorganicsdirectory.com.au/>

Bodies associated with organic production

- Growers (see link for examples)
<http://enviro.org.au/organics-read.asp?pcode=3040&ztitle=Melbourne+Australia+Organic+Retailers/Producers>
- Farmers markets (see links for examples)
<http://www.rfm.net.au/>
<http://www.whitehat.com.au/Victoria/Markets/Farmers.asp>

Australian Context

Educational sectors involved with food/hospitality/tourism

- Primary, secondary, TAFE, Universities

Local/interstate restaurants/eateries (niche positions in the market place)

Established restaurants may see the possibility to venture into this stream of food production and service. This is where regional restaurants may have better access to locally grown organic produce.

Within the context of this report a skill deficiency exists where a demand for labour has not been recognised and where accredited courses are not available through Australian higher education institutions. This demand is met where skills and knowledge are acquired on-the-job, gleaned from published material, or from working and/or study overseas.

The Skills Gaps

Following are a series of skills and knowledge areas to be investigated as a part of the fellowship

Major skill gap

Value adding to our regional organic produce

Investigate best practice examples for increasing the value of organic produce through the process of up-selling organic products. Up-selling involves value adding to organic produce by taking organic products from their raw state to one which has been processed; products such as: a paste, grinds, frozen, dehydrated and blends.

Development of these organic products developed and sold in different forms will generate new market potential. Finding a profitable and functional model to do this is paramount to getting it right the first time and hence avoiding wasting time and money in futile exercises.

There is potentially a niche market for restaurants that are willing to develop the concept of “value adding” further. Participating restaurants could be promoted as part of the local/international tourist industry for that region and could feature ‘the valued added’ produce as part of their menu. This would help boost the local/international economy and provide an opportunity to put back’ as such; nurturing and growing the organic trade.

Minor skill gaps

The knowledge to help extend regional organic produce’s shelf life

One major drawback with organically grown produce has been the lack of shelf life for these products both vegetable and animal. Many common goods that we stock in our pantries and fridges are chemically enhanced with many synthetic preserving agents that “keep” our food longer on the supermarket shelf, therefore finding methods of preserving, snap freezing or processing without the use of synthetic preservatives is another reason to value add to organic foods.

Improving the farming systems of regional organic produce

The economic costs behind organically produced food has always been relatively high due to high costs involving the growing of the product, the labour involved in doing so, marketing (or the lack of it) of organically based products and general product information available to anyone who may be in, or looking at getting involved with organic farming. An investigation of ways and means of overcoming some of these issues would result in savings that could be passed onto the consumer and additionally, a rise in the consumption of organic foods and better monetary return to the producers. This would then create a “win/win” scenario.

International Context

Destinations

Visits to three major natural/organic wholesaling chain stores in the US to document their best practices:

- Albert's organics – Denver, Colorado – Jim Hagen, Store Manager
<http://www.albertsorganics.com/>
- Wild Oats market place – Superior, Colorado – Mike Burger, Store Director
<http://www.wildoats.com/u/home/>
- Whole foods market – Las Vegas, Nevada – Marketing Department
<http://www.wholefoods.com/>

Visits to two major farmers markets (one in Los Angeles and one in Denver) to gather input to how they work with the local industries (restaurants etc...) and what part they play with the wholesaling chain:

- Old South Pearl Street Farmers Market – Denver, Colorado – Samantha Robinson, Market Manager
http://www.oldsouthpearlstreet.com/fm_1.htm
- Wednesdays farmers Market – Santa Monica, California – Laura Avery, Market Manager
http://santa-monica.org/farmers_market/wednesday.htm

A two day training/research program at the Rodale institute (Pennsylvania) to investigate at the organic food market from a grower's point of view and how they perceive "value adding":

- The Rodale Institute – Kutztown, Pennsylvania – Dr Paul Hepperly, Research/Training Manager
<http://www.rodaleinstitute.org/>

Why the USA?

Information pertaining to the Organic movement in the USA

Organic Standards and Certification

(Adopted from Carolyn Dimitri and Catherine Greene: Agriculture Information Bulletin No. (AIB777) September 2002)

Organic farming systems rely on ecologically based practices, such as biological pest management and composting; virtually excluding the use of synthetic chemicals, antibiotics, and hormones in crop production and prohibiting the use of antibiotics and hormones in livestock production. Under organic farming systems, the fundamental components and natural processes of ecosystems— such as soil organism activities, nutrient cycling, and species distribution and competition— are used as farm management tools. For example, food and shelter are provided for the predators and parasites of crop pests, planting and harvesting dates are carefully planned and crops are rotated and animal manure and crop residues are cycled in organic production systems. Organic livestock production systems attempt to accommodate an animal's natural nutritional and behavioural requirements, requiring dairy cows and other ruminants, for example, to have access to pasture.

Private organisations, mostly non-profit, began developing certification standards in the early 1970's as a way to support organic farming and thwart consumer fraud.

International Context

Some States began offering organic certification services in the late 1980's for similar reasons. The resulting patchwork of standards in the various certification programs, however, caused a variety of marketing problems.

Congress passed the Organic Foods Production Act of 1990 to establish national standards for organically produced commodities, and USDA promulgated final rules for implementing this legislation in December 2000. Central to this development was the recognition of the definitions established by the National Organic Standards Board (NOSB) in 1995. Definitions were as follows:

Definition of Organic

“Organic agriculture is an ecological production management system that promotes and enhances biodiversity, biological cycles and soil biological activity. It is based on minimal use of off-farm inputs and on management practices that restore, maintain and enhance ecological harmony.”

This definition of “organic” was passed by the National Organic Standards Board (NOSB) at its April 1995 meeting in Orlando, FL.

Organic Certification

For a grower or processor to become certified, they must adhere to strict uniform standards which are verified by either a private or public certifying agency. These standards include:

- The land on which the organic food is grown must be free of prohibited substances for three years prior to certification.
- Farmers and processors must keep detailed records of the farming methods and their materials used in production.
- All of these methods and materials are inspected annually by a third party certifying agent.
- All farmers and handlers are required to maintain written plans detailing their organic management practices.

USDA is currently implementing these organic regulations, and all agricultural products that are sold, labelled, or represented as organic must be in compliance with the regulations after the 18-month transition period is completed in October 2002. These regulations require that organic growers and handlers (including food processors) be certified by a State or private agency accredited under the uniform standards developed by USDA, unless the farmers and handlers sell less than \$5,000 a year in organic agricultural products. Retail food establishments that sell organically produced agricultural products but do not process them are also exempt from certification.

The national organic standards address the methods, practices, and substances used in producing and handling crops, livestock, and processed agricultural products. Although specific practices and materials used by organic operations may vary, the standards require every aspect of organic production and handling to comply with the provisions of the Organic Foods Production Act. Organically produced food cannot be produced using genetic engineering and other excluded methods, sewage sludge, or ionizing radiation. These standards include a national list of approved synthetic and prohibited non-synthetic, substances for use in organic production and handling.

USDA organic standards for food handlers require that all non-agricultural ingredients, whether synthetic or non-synthetic, be included on the national list. Handlers must

International Context

prevent the co-mingling of organic with non-organic products and protect organic products from contact with prohibited substances. In a processed product labelled as “organic,” all agricultural ingredients must be organically produced unless the ingredient(s) is (are) not commercially available in organic form.

The labelling requirements under the national standards apply to raw, fresh, and processed products that contain organic ingredients and are based on the percentage of organic ingredients in a product. Agricultural products labelled “100 percent organic” must contain (excluding water and salt) only organically produced ingredients.

Products labelled “organic” must consist of at least 95 percent organically produced ingredients. Products labelled “made with organic ingredients” must contain at least 70 percent organic ingredients. Products with less than 70 percent organic ingredients cannot use the term organic anywhere on the principal display panel but may identify the specific ingredients that are organically produced on the ingredients statement on the information panel. The USDA organic seal—the words “USDA organic” inside a circle—may be used on agricultural products that are “100 percent organic” or “organic.” A civil penalty of up to \$10,000 per violation can be levied on any person who knowingly sells or labels as organic a product that is not produced and handled in accordance with these regulations.

The growth of organic farming

Organic farming became one of the fastest growing segments of U.S.A. agriculture during the 1990's. U.S.A. producers are turning to organic farming systems as a potential way to lower input costs, decrease reliance on non-renewable resources, capture high-value markets and premium prices, and boost farm income. Organic farming systems rely on ecologically based practices, such as cultural and biological pest management, and virtually excludes the use of synthetic chemicals in crop production and prohibits the use of antibiotics and hormones in livestock production. Many producers, manufacturers, distributors, and retailers specialise in growing, processing, and marketing an ever widening array of organic food and fibre products.



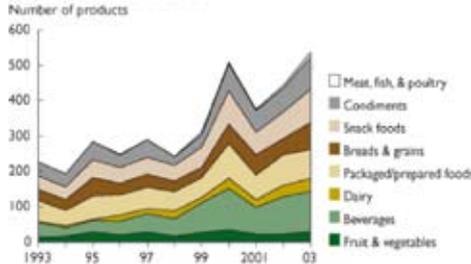
International Context

New organic product introductions and sales of organic food

Over 5,000 new food and beverage products were introduced to the U.S.A. retail market in 2003. Organic product introductions made up a growing number of these. Beverages, prepared foods, and snacks led the number of new organic product introductions in 2003.

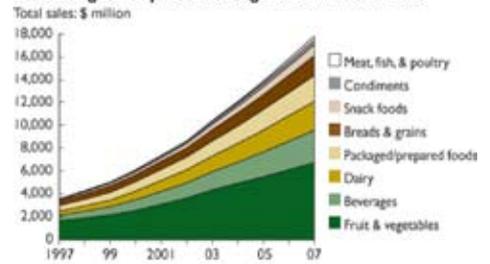
Of the \$10 billion in total organic food sales in 2003, fruits and vegetables remain the largest category, accounting for 42 percent of sales. The National Business Journal estimates that U.S.A. sales of organic products will reach \$17.8 billion by 2007.

New organic product introductions are led by beverages, prepared foods, and snacks



Source: ERS calculations using ProductScan data from Datamonitor, 2004.

Fruits and vegetables remain the largest category of sales, accounting for 42 percent of organic food sales in 2003



2004-2007 estimated
Source: National Business Journal, 2004.

Distribution of organic handling facilities

Just over 3,000 organic handling facilities—facilities that process and distribute organic products—were certified to USDA standards to handle organic products in 2004. These facilities are heavily concentrated on the Pacific Coast (41 percent of the total). Nearly 800 were in California. In contrast, over half the States, mainly in the Southeast, the Midwest, and the Mountain States, had 30 or fewer facilities.



Source: USDA, Economic Research Service.

International Context

Key issues

Organic Certification – USA

Through the USDA, organic farming and distribution has had great success in setting itself into the mainstream market. The U.S.A. has had the advantage of past experience to manage and set a single standard to which all products must adhere. The farmers, distributors and wholesalers that wish to display the USDA motif (see pic) upon their product all fall into the same certification and auditing process. This process is clearly defined and readily available for all consumers to consult via different media means.

The National Organic Program (NOP) is the organic certification arm of the USDA and is responsible for all certification and complying programs within the U.S.A. Their website has all the information relating to all certification process and current news that may be beneficial to organic producers, distributors and wholesalers.

The Organic Foods Production Act of 1990, part of the 1990 Farm Bill, authorised the Secretary of Agriculture to appoint a 15-member National Organic Standards Board (NOSB). The board's main mission is to assist the Secretary in developing standards for substances to be used in organic production. The NOSB also advises the Secretary on other aspects of implementing the national organic program. The current board is comprised of four farmers/growers, two handlers/processors, one retailer, one scientist, three consumer/public interest advocates, three environmentalists, and one certifying agent. Recommendations made by the NOSB are not official policy until they are approved and adopted by the USDA.

The Agricultural Marketing Service (AMS) is also involved in the organic guidance and is part of the USDA. The body oversees the marketing and furthering of six commodity programs in the U.S.A. These are: Cotton, Dairy, Fruit and Vegetable, Livestock and Seed, Poultry, and Tobacco.

This process of singularly stamping organic products with a common and well known symbol has been beneficial for all who are associated in the organic industry in the U.S.A. The main benefit has been that the symbol is governed by 1 set of guidelines that has been set by different parties associated in the organic business and is overseen and monitored by the government. This in turn helps the community identify the certified produce and trust that the product has met all guidelines.

There are many organic certifiers in the U.S.A. (About 62), but the USDA is the most common used by many growers and is national to all states.



International Context

Further information relating to USA farmer's markets

Direct marketing of farm products through farmers markets continues to be an important sales outlet for agricultural producers nationwide. Farmers markets, now an integral part in the urban/farm linkage, have continued to rise in popularity, mostly due to the growing consumer interest in obtaining fresh products directly from the farm. The number of farmers markets in the United States has grown dramatically, increasing 111 percent from 1994 to 2004. According to the 2004 National Farmers Market Directory, there are over 3,700 farmers markets operating in the United States. This growth clearly indicates that farmers markets are meeting the needs of a growing number of farmers with small- to medium-size operations.

Who benefits from farmers markets?

- Small farm operators: Those with less than \$250,000 in annual receipts who work and manage their own operations meet this definition (94 percent of all farms).
- Farmers and consumers: Farmers have direct access to markets to supplement farm income. Consumers have access to locally grown, farm-fresh produce and the opportunity to personally interact with the farmer who grows the produce.
- The Community: Many urban communities where fresh, nutritious foods are scarce gain easy access to food. Farmers markets also help to promote nutrition education, wholesome eating habits, and better food preparation, as well as boosting the community's economy.

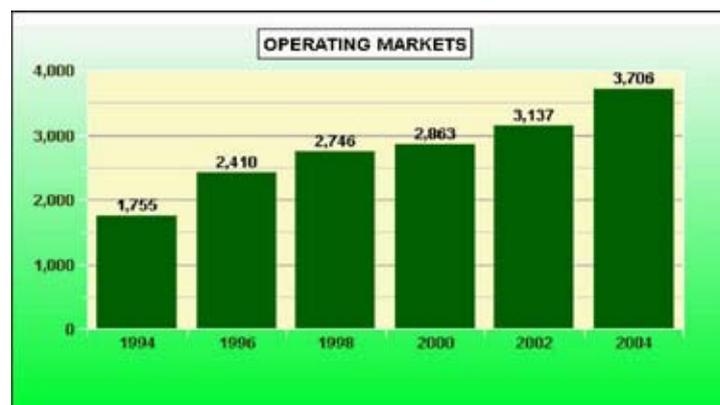
2000 USDA farmer's market study statistics

- Farmers markets are an important source of revenue. 19,000 farmers reported selling their produce only at farmers markets.
- 82 percent of markets are self-sustaining; market income is sufficient to pay for all costs associated with the operation of the market (not including grant or in-kind support).
- 58 percent of markets participate in WIC coupon, food stamps, local and/or State nutrition programs.
- 25 percent of markets participate in gleaning programs aiding food recovery organizations in the distribution of food and food products to needy families.

Source: <http://www.usda.gov/wps/portal/usdahome>

Farmers market growth

In 1994, the U.S. Department of Agriculture (USDA) began publishing the National Directory of Farmers Markets which lists all farmers markets operating in the U.S. Since that time, USDA has updated the Directory every 2 years. The following graph shows the number of markets at each update.



International Context

Additional information on this growth and turnover follows:

- **USDA Releases New Farmers Market Statistics**
Joan.Shaffer (202) 720-8998
Billy Cox (202) 720-8998

WASHINGTON, Dec 5, 2006 — The U.S. Department of Agriculture today announced the number of farmers markets increased more than 7 percent between 2005 and 2006, preliminary results of a survey indicate.

The new numbers are based on an update of the National Farmers Market Directory by USDA's Agricultural Marketing Service (AMS), and the preliminary results of the 2006 USDA National Farmers Market Survey, conducted by AMS in partnership with Michigan State University.

"These statistics show farmers markets continue to be an increasing source of income for our nation's farmers," said AMS Administrator Lloyd Day. "Their popularity with consumers is growing, and buyers enjoy fresh, locally grown products."

The updated directory lists 4,385 farmers markets currently operating in the United States, representing a 7 percent increase from 4,093 farmers markets in 2005. As a result of the strong growth in the number of farmers markets, total sales volumes are estimated at about \$1 billion for 2005, significantly larger than the estimated sales volume of \$888 million in 2000.

Average sales at individual farmers markets in 2005 totalled about \$245,000; average annual sales per vendor totalled \$7,108. Marketing opportunities at farmers markets were sufficiently favourable in 2005 that, on average, 25 percent of vendors from surveyed farmers markets relied on these markets as their sole source of farm-based income.

The revised version of the National Farmers Market Directory can be accessed on-line at <http://www.ams.usda.gov/farmersmarkets/map.htm>.

Source: <http://www.usda.gov/wps/portal/usdahome>

The following graphic depicts farmer's markets locations across the US:



1 dot = 1 zip code centroid with a farmers' market

Source: <http://www.usda.gov/wps/portal/usdahome>

International Context

Findings: Destinations in the USA

Albert's Organics – Denver, Colorado

Albert's Organics is the national distributing arm of fresh and perishable products for United Natural Foods. United Natural Foods is the leading distributor of organic products to the USA. Albert's Organics is a huge storage and distribution centre located on the fringe of Denver in a suburb called Aurora. The warehousing facilities are very modern and up to date with the latest computerised ordering and supply systems available. This puts Albert's Organics at the forefront of fresh produce distribution. George Wright is the fresh category director at the Aurora division store and has been with the company for 16 years. His main role (among a series of others) is to manage the day to day running of the centre and oversee the ordering and dispatching system. This involves areas such as sourcing new growers, dealing with wholesalers, monitoring product harvest and inspecting the product before it is distributed to the retailers.

Insight

Organic produce has been a part of the USA consumer's lifestyle longer than conventional products; however the market share for organics is still quite small in comparison to conventional products. There is, however, a changing trend in the popularity of organic produce. Not just a phase, but a real consistent upward trend that sees the purchase of organic products becoming more consistent in consumers' day to day shopping activities.

Certification

Generally speaking the demand for organic products outstrips the supply of them. This is due to a couple of common factors. The farmers that have been certified organic have had to do so under strict guidelines from the United States Department of Agriculture. This involved a 3 year certification process that includes mandatory tests and checks of the soil and product along with data that was collated by the farmer to present as evidence for certification.

Contract

Another issue is that many large farmers are under contract to conventional supermarkets. For these farmers to even think about going totally organic would mean a problem with their cash flow because of the 3 year certification process. Quite a few of the larger farms have undergone certification to smaller acreage of their land so that they still have a turn over for their business while their certification process takes place. This all takes time, hence the demand outstripping the supply. An example of the supply and demand situation has Albert's Organics already contracting organic producers for product that has not even been sown yet. This also accounts as to why importation of certain food stuffs is occurring; Mexico for bananas, New Zealand for beef, Canada for salmon and Australia for cheese are just a small example of the global importation. Suppliers from these countries must comply with the USDA organic certification regulations.

Fair trade practices are well entrenched in the United Natural Foods (UNFI) code of ethics when dealing with overseas suppliers. This is held in great regard by the USA consumers who view it as a vital part of creating an equal and better world to live.

For example, a supplier of coffee beans from Africa to UNFI must comply with a fair trade agreement where the farmer, the worker anyone associated with the growing and importation of the product must be getting a fair wage and have fair working conditions.

International Context

Albert's organics have distribution centres across America. These include:



United Natural Foods Inc (which own Albert's Organics) are truly national with divisions right across the USA. Other distribution centres for UNFI are as follows:



International Context

The following observations on the benefits of choosing organic products are based upon studies and opinions from Albert's organics & UNFI.

Organic products:

Protect Our Health

Organic food production limits the use of toxic chemicals into the environment and into our food supply. By eating organic foods you support a healthy lifestyle for yourself, your children, and for the farm workers in the fields.

Support the Environment

Organic agriculture positively effects the environment by creating a long term farming solution which sustains our land and water resources, as well as supports the balance of our natural ecosystems.

Protect our Waters

Organic agriculture does not use chemicals that will pollute our ground water, a primary source of our drinking water.

Create a Diverse Ecosystem

Organic farming practices respect and support of our environmental diversity by allowing a wide variety of plant species and wild animals to thrive in their natural habitats.

Assist in Combating Erosion

Organic agriculture builds the topsoil on the fields and keeps it from eroding into our waterways.

Save Energy Resources

Because organic farming does not rely on non-renewable fossil fuels for crop production, it requires less of these resources to operate. Instead, organic farmers rely on cover crops, plant rotation and natural insect control which do not involve the use of synthetic chemicals.

Are Free From Genetic Modification

Organic foods are never genetically modified or engineered, nor are they ever irradiated.

Meet Stringent Standards

The Organic certification process ensures that crops have been grown and handled according to the strict standards put forth by the USDA in the National Organic Standards, assuring that no toxic chemicals have been used in the growing and handling process.

The following fruit varieties are available at Albert's Organics:

Apples	Eggfruit	Feijoas	Plums
Apricots	Figs	Melons	Pomegranates
Avocados	Grapefruit	Nectarines	Large Pomegranates
Banana	Grapes	Oranges	Prunes
Berries	Guava	Papaya	Sapote
Cherimoya	Kiwifruit	Passion Fruit	Tangelos
Cherries	Kumquat	Peaches	Tangerines
Coconut	Lemons	Pears	Nuts also available
Cranberries	Limes	Persimmons	
Dates	Mango	Pineapples	

International Context

The following vegetable varieties are also available:

Artichokes	Cauliflower	Ginger	Peas
Asparagus	Celery	Herbs	Peppers
Beans	Chard	Kale	Potatoes
Beets, white	Cilantro	Kohlrabi	Radicchio
Bok Choy	Collards	Leeks	Rhubarb
Broccoli	Corn	Lettuce varieties	Rocket
Brocolinni	Cucumbers	Lotus Root	Salads, assorted
Brussell sprouts	Daikon	Mizuna	Soya Beans
Burdock Root	Dandelion greens	Mushrooms	Spinach
Cabbage	Eggplant	Okra	Sprouts
Cactus, clean	Endive	Onions	Squash
Carrots	Garlic	Parsley	Sunchokes
Taro Root	Tomatillos	Tomatoes	Turnips
Watercress	Yams		

Albert's Organics carries a full line of organic and natural meats including, beef, poultry and pork. In addition, they carry both bulk and packaged deli meats. All of these products are sold fresh.

Meat and Poultry Connections

Meat and poultry products come from regional, national, and even international producers. The suppliers include Eberly Poultry (Pennsylvania), Organic Valley (Wisconsin), Mesquite Organic (Colorado), Mary's Organic Poultry, (New Jersey), Hellaby Farms (New Zealand) and Applegate Farms (USA).

Quality Standards

All of Albert's Organics meat and poultry products are raised in open-air and free-range environments in the style of traditional family farms. Because of the open and healthy environment in which these animals are raised, they tend to be exposed to fewer diseases than animals which are raised in confined environments. This in turn decreases the need for vaccinating the animals. All of the producers that Albert's Organics work with raise their animals without the use of antibiotics or added growth hormones.

Dairy Product Line

Albert's Organics carries a full line of organic and natural dairy products including milk (some in glass bottles), cheese (including some specialty lines), cream, cottage cheese, half & half, yogurts, sour cream and eggs.

Dairy Connections

Albert's Organics dairy products come from local, regional, and national producers. The suppliers include Organic Valley (Wisconsin), Horizon Organics (Colorado), Chrome Dairy (Pennsylvania), Natural by Nature (Pennsylvania), Stonyfield Farms (New Hampshire), Brown Cow Farms (California), Mountain High (Colorado), Seven Stars (Pennsylvania) and Cozy Shack (USA).

Quality Standards

The best dairy products come from producers who value and consider the welfare of their animals. All of Albert's Organics dairy products are produced from farms where the animals have access to the outdoors, including fresh air, clean water, sunshine, and lots of exercise. These animals receive no antibiotics or added growth hormones. All of Albert's dairy producers protect the water resources by pasturing their animals and having environmentally sound manure management plans.

International Context

Additional Grocery Items Product Line

Albert's Organics carries an excellent assortment of both organic and natural perishable grocery products including juices, fresh pasta, tofu and soy products, fresh hummus, dips, salsas, condiments, fresh salad dressings, tortillas, dried fruit, soups, pates, and more.

Brand Diversity

Each of Albert's divisions will often carry different lines of the same product. For example, each division may carry a different brand of tofu. The reason for this diversity is that Albert's try as often as possible to work with local and regional manufacturers and food artisans.

Pack Sizes

In addition to retail case packs, some of Albert's organic and natural grocery items come in institutional sizes for food service companies and restaurants.

Concluding Observation

The magnitude of Albert's Organics division was quite a humbling experience, considering that the organic movement in the USA is still in its infancy. The logistical set up to enable Albert's Organics to tie in with the seasonal productivity of the organic farmers needs to be seen and heard to believe. Many careful planning hours have gone into setting up the flow of information and product lines so as to meet the ever growing demand for organic produce.

Wild Oats Market Place – Superior, Colorado / Santa Monica, California

Arriving at one of North America's largest organic supermarket chain was an awe-inspiring experience. Central to creating this response were the aesthetics of the store, something never observed in a supermarket store in Australia (these will be elaborated upon below).

Observations of the Wild Oats Organic Supermarket, USA.

Overall vibrancy of products on display

Upon arriving at Wild Oats visitors are first greeted by the abundance of fresh organic smells that are wafting through the building, mainly from the fresh produce area which was a sea of colours that attracted the Fellow's eye upon entry. The general layout was not unlike any conventional supermarket, but the feeling of a much cleaner and better product was very evident as you cast your eye around the abundant products. All products are set so as to catch attention, with strategies to promote the organic item in its natural form. The layout was designed to promote the products and included many props to show case the amazing range of organic produce. The fresh produce was fantastic with a very inviting set up that "made" you want to inspect what was on offer. The meat, seafood and poultry section was also well designed with plenty of information available regarding the origin of the products on sale. The deli department was second to none compared to conventional supermarkets. The way raw and pre-made organic products were displayed was of a very high professional standard with attention being paid to planning details and well trained staff. It was an experience not to be forgotten.

Information on products provided to the customer

Throughout the Wild Oats supermarkets, there is an abundant amount of information of the products on sale. There where booths set up where a certain type of organic

International Context

product was showcased with taste tests and information available that was specific and thorough on the origin and serving ideas, ingredient content and so on. It was apparent that the marketing of the information was not only to inform the regular shopper of the product but to also to help inform the inquisitive shopper who may have only dropped in to see what the fuss was all about.

Range of products (organic matches conventional)

There was a huge range of organic products available for purchase. For every conventional product on the market there was an organic counterpart, and in most cases, quite a few counterparts. Consumers would have no trouble in changing over their conventional list to a true organic list for shopping as the range was extensive with more products to come. The range is limited only by the amount of organic farmers/producers in the USA, that has grown steadily over the last 10 to 15 years. Not only was there a counterpart for the usual type of grocery products, but also health supplements, hair products, skin care, beauty products as well. There was also a section devoted to media with books, magazines, compact discs etc available for purchase. There was even a diagnostic centre set up through a touch screen computer that suggested organic remedies for basic types of ailments.

Dine in / take out provisions for produce

Wild Oats offered and promoted self serve meals that consisted of both hot and cold varieties. You could select from a buffet style of food service or order a fresh sandwich, pizza, toasted focaccia that was made fresh in front of you. Wild Oats had facilities for dining in or taking away (in recycled containers of course). Also available was a range of fresh juices, coffees etc that could also be ordered for drinking in or take away. This eatery set up in the store only heightened the sense to the unbelievable aromas and colours in the stores. "It was just amazing to see, smell and taste".

Enthusiasm and knowledge of staff

One thing that really stood out when speaking with staff members was their knowledge of the products that they were responsible for selling. It was truly inspiring to listen to staff discuss products, offer product tastes and then provide ideas as to how the product could be served. All staff members met showed an uncanny enthusiasm for the products and for the store in general. There is a tangible care factor from the staff and this provides evidence that induction and training courses offered by this organic supermarket must be of a very high standard.

Conventional supermarkets stocking organic products

A large conventional supermarket was visited while in Allentown and it was surprising to see the significant amount of organic produce they stocked. There was a huge section devoted to organics that was a mirror (in a much smaller scale) image of Wild Oats. Even the largest conventional supermarket in the USA, Wal-Mart, has started to stock basic name brand organic products. Evidence suggests that large conventional supermarkets are participating in the general trend towards carrying organic produce, but as noted by organic sellers "once a conventional, always a conventional". While this may be perceived as a threat, organic sellers noted that the growth in organic supermarkets may even help their cause due to that fact that they are the experts and are seen as the true wholesalers of organic produce.

Willingness of management to showcase store

Upon arriving at Wild Oats Organic Store, I was taken by the way that Mike Burger (Store Director of the Superior store – Colorado) went out of his way to showcase Wild Oats. He was enthusiastic in relating the what, the how and the why of organic produce benefit not

International Context

only your health but also fair trade practices. Wild Oats has adopted fair trade practices as part of its dealings with international suppliers. Burger was well versed in his stores operation and offered a one-on-one store tour through all sections of Wild Oats. Burger spent the best part of 2 hours providing information on every aspect associated with the stores produce and operational set up.

Friendly and inviting atmosphere

Wild Oats offered a friendly and clean environment where one felt as though they were not actually in a supermarket but almost in the fields with the organic produce, such were the colours and the aromas found in the stores. It was a complete marketing package that included enthusiastic employees, aesthetically designed floor plans, fantastic displays, choice and range of produce all working together in harmony to make it a great experience in store.

Ties between supermarket and local growers

Burger noted that there were still links between local growers and suppliers that Wild Oats have pursued and maintained. There is a perception that some local communal organic growers are concerned that large wholesalers will disrupt and damage the ideology of organic produce due to the fact that it is becoming a more and more profitable enterprise and there is concern that less than trust worthy people may 'infiltrate' and have an effect in this trade. There are many more local suppliers in the area that provide produce to the store which certainly gives a 'communal' feel to the Wild Oats store. Testament to this is an organic pumpkin grower who still brings his produce on the back of a truck and supplies the Superior Wild Oats store with those pumpkins on a weekly basis.

Distribution of Wild Oats organic supermarkets has been in a steady growth stage over the last 10 years. Following is a list that identifies the store's locations within the USA.

- Arizona (4 stores)
- Arkansas (1 store)
- California (5 stores)
- Colorado (12 stores)
- Connecticut (2 stores)
- Florida (5 stores)
- Illinois (3 stores)
- Indiana (2 stores)
- Kansas (2 stores)
- Kentucky (2 stores)
- Maine (1 store)
- Maryland (1 Store)
- Massachusetts (3 stores)
- Missouri (2 stores)
- Nebraska (2 stores)
- Nevada (3 stores)
- New Jersey (1 store)
- New Mexico (4 stores)
- Ohio (4 stores)
- Oklahoma (1 store)
- Oregon (6 stores)
- Tennessee (3 stores)
- Utah (5 stores)
- Virginia (1 store)
- Washington (1 store)
- Washington, DC (1 store)
- Wisconsin (1 store)

International Context

As demonstrated by this list, Wild Oats organic supermarkets have a large national presence. Having this national distribution of stores certainly profiles Wild Oats in the broader community. However, Wild Oats is still relatively small in its locations as compared to conventional supermarkets. Whole Foods are another major player in the organic supermarket stakes. It has a larger distribution base than Wild Oats – 170 plus supermarkets in the USA with some stores in Canada and England. These two major organic supermarkets are leading the charge to provide the local customer with available and affordable organic produce.

An example of how the USA is influencing the organic area in Australia is Macro Wholefoods organic supermarket. Macro Wholefoods is one of Australia's largest chain of organic supermarkets. The supermarket has been modelled around the Whole Foods market organic supermarket in the USA; Whole Foods market now being the worlds leading organic supermarket chain.

Concluding observation

Wild Oats and Whole Foods employ similar concepts when it comes to organic supermarkets. Both stores have a familiarity about each other with a lot of mirroring of ideas and marketing ploys. In terms of detracting from each other's business, a similar analogy can be drawn between major fast food chains competing against each other for business. The big difference is that both companies want to promote a lifestyle to the general public which would be beneficial to a way of life. Both companies need sales to remain viable and are listed on the New York stock exchange - they have share holders wanting a return for their investment. The bottom line is however, that they are both on a mission to better the United States of America's eating habits so as to deliver a better outcome for generations to come.

The Rodale Institute – Kutztown, Pennsylvania

Healthy soil=healthy food=healthy people

Insight

The area of Allentown is green and quite lush with gentle rolling hills. The main agriculture consists of corn/maize Soya bean and cattle/dairy. The sweeping hills make it not quite suitable for full crop growing (this is more relevant in the mid west – Iowa etc and the far South West – California, which has a longer growing season due to its climate position).

Rodale institute is based on an old German farm and a little bit of Europe is evident in some of the older buildings. The guesthouse was over 200 years old as are the original farming sheds. It is a beautiful old house with 5 bedrooms upstairs and full living quarters downstairs, with a cellar as well. The institute itself is not a modern facility, but rather a more homely facility with offices located in one or two houses on the property (it seems very community orientated rather than scientific).

However, this is not just another small, insignificant facility. Rodale's findings and scientific research into organic farm management is at the forefront of advancement of organic farming sustainability in the USA. A lot of the advancement on organic farming sustainability in the USA and overseas has been lead by the team at Rodale.

Rodale's philosophy is very simple, healthy soil=healthy food=healthy people. This seems to be a simple statement, and in its purest form it is, but with the mindset of today's culture and lifestyle it is very difficult to comprehend such a simple statement.

International Context

Rodale's main objective is to look at the very soil that we grow produce in and the means in which we look after its "health". Through correct and natural means, the soil is brought back to its original state (before it was ploughed and sprayed constantly) and managed so as it delivers healthiness back into the crops that are planted, therefore producing healthy (organic) food stuffs.

Rodale invites many groups/individuals from many different cultures to partake and see the value in managing their practices in an organic manner. The advantages are aimed towards the bettering of our lifestyle.

Rodale History

Robert Rodale, the founder of the Rodale institute was a visionary who saw the world as a place to try and better. When people said why? Robert Rodale would say why not? His love, drive and passion was second to none and his great interest in bettering lifestyles of people in the USA, Africa and Russia, was paramount to him. Rodale was heavily involved in bringing organic farming to the forefront in these countries and was the driving force behind the Rodale Institute in its innovation.

Organic vs conventional experiment:

Initiated in 1981, The Rodale Institute Farming Systems Trial (FST) is the longest-running side-by-side comparison of organic and conventional farming systems in the US, and one of the oldest in the world. What began as a 5 year controlled study of what a typical American grain farmer would go through to give up chemical fertilizers and pesticides has matured into a complex, interdisciplinary, collaborative project that will be continued indefinitely. As The Rodale Institute President John Haberern puts it, the FST is "a living experiment. It doesn't have an end."

The FST compares three strategies, or 'systems,' for grain production: one conventional, one livestock-based organic and one legume-based organic. The conventional system follows a 5 year rotation typical of many farms across the Midwest - corn, soybeans, corn, corn, soybeans - and receives fertilizer and pesticide applications according to the standard recommendations provided by Pennsylvania State University.

The livestock-based organic system follows a 5 year rotation of corn, soybeans, corn silage, wheat, red clover and alfalfa hay, with aged cattle manure applied in the two corn years.

The legume-based organic system is structured around a 3 year rotation of hairy vetch/ corn, rye/soybeans, and wheat. The two organic systems receive no chemical inputs for fertility, weed or pest control.

Sourced from <http://www.newfarm.org>

Seven Goals of the Rodale Institute

- 1) Help people rediscover that the food they eat is a primary tool in achieving optimum health and avoiding illness and disease.
- 2) Increase public awareness that healthy food can only be obtained from healthy soil.
- 3) Reach out to young people and become partners with them in reshaping public attitudes.
- 4) Make soil quality as important to the public as air and water quality.
- 5) Encourage more people to grow, sell, buy, and eat organic food.
- 6) Include regenerative farmers, food companies, and food stores on the same team as medical and other health-care professionals.
- 7) Respect and interpret that the mind and soul require nourishment as part of total human health and a regenerative way of life, for current and future generations.

International Context

Underpinning these objectives and providing the foundational blueprint for the work at the Rodale Institute are the following goals of the Soil and Health Foundation, established in 1947, forerunner of The Rodale Institute:

- Promote and encourage the use of humus and other organic matter to maintain and improve soil fertility, prevent soil erosion, and improve human health.
- Conduct and encourage scientific research, teaching, training, and educating the public on soil, foods, the health of man, and their reaction to each other.
- Study the effects of organic and artificial fertilisers on soil, plants, and man.
- In order to accomplish the forgoing purposes, establish, maintain, and operate farms, schools, laboratories, experimental stations, publishing houses and all other appropriate agencies, means, and instruments.

To meet these goals, The Rodale Institute Experimental Farm stresses five education, training and research initiatives: soil health, food quality, regenerative agriculture education, composting and regional, national and international community development.

Long the site of the important Farming Systems Trial™, the Experimental Farm is now increasing its emphasis on education. It forges new collaborations and partnerships, and communicates its results and their clear implications to the public, especially young people and decision-makers in the food industry. In addition, the Rodale Institute works with food industry leaders to show them how to adopt more healthful methods and still prosper.

Sourced from <http://www.rodaleinstitute.org/>

The future success of the Rodale Institute

Through the study and experimental work done at the Rodale Institute, the benefits to the organic farming movement have been of great importance. The Rodale Institute is not only involved in organic studies for the farmer but is very involved with the education of children to the benefits of growing and eating organic based food products.

Rodale Institute prides itself upon nurturing tomorrow's generation towards a healthier lifestyle and does so with seminars, tours, practical workshops that involves the younger generation. This way of education is becoming sought after in an ever increasing scale due to that fact that the need for a better outlook for children is becoming a more and more important factor.

With over 50 years of history, the Rodale Institute has become the leader in the study of organic farming and soil management with a bright outlook to the future to increase it's involvement in the field of organic study. Rodale is helped by the fact that it has its own publishing arm which is involved heavily in publishing any work that has been documented by the Institute. Along with web access, the Rodale Institute has become truly global with contact to the entire world and has been part of global organics for quite some time.

With the ever increasing trend to organics, Rodale is truly a world leader in the study and experimental work towards organic farming and soil management.

An initial introduction into the workings of Rodale was provided by Dr. Paul Hepperly. Hepperly hosted a tour of the hub of Rodale and spoke intently of the work and vision that Rodale was working towards. It was not just a case of working wholly with farmers and researchers.

International Context

The institute was also about educating the young and families in the facets of organic farming. The main farm centre is set up as a working model of how organic farming can be fun for the children to partake in. Included was a “pizza” garden patch, medicinal herb garden, different plants of the world and a garden devoted to the kids where they managed, grew and harvested their very own organic food products (they were not told what to plant, but asked what they would like to plant).

Soil Management

The main focus of the Institute was developing knowledge of how to look after soil in a truly organic way. Such a process included minimising energy usage in ploughing the fields after each crop was harvested (the main crops on the institute were maize and soya bean with a few fruit tree varieties). The method in which composting helped with water retention in the soil, and the way in which “roll down” was more advantageous as opposed to ploughing were two of the techniques observed for improving soil. The institute has been conducting many working experiments showing comparisons between the 2 growing crops and there was a marked difference in the 2. Roll down involved a roller which was rolled over the planted legumes which flattened the legumes to form a matting of natural matter (this helps with weed control). At the same time of rolling, the seed is planted in a furrow and then the growing commences. Checks are made continually on the soils nitrogen, water retention and the weed growth. All assessments are continually recorded including weather and climatic conditions and this informs the planning for the following year’s crop.

Institute Co-op

A co-op is housed on the institute grounds. This is where many groups/individuals pay an annual subscription to a group of organic farms. This can be likened to putting in money to “buy stock” in the group of organic farms to which a “dividend” of a box of mixed varieties of organic produce is “paid” to the co-op members on a weekly/fortnightly basis. This showcases the community bond to organic farming. This is becoming more and more a way of life to many thousands of people across the USA (one co-op has 1,000 plus members). This is not just a few local farmers getting together and passing on some organic bits and pieces, it is an up to date process using new technology with a major distribution centre. Quite a few large organic farmers have joined and deliver batches of organic food stuffs out to smaller centres that then pass them onto the members. This is a steadily growing trend as it epitomises the local communities care in it self and its lifestyle.

Compost Management

The Fellow met with the two interns Aaron and Rita. Rita provided a tour that started with the compost. The local council is unable to drop the leaves (which make up the bulk of the compost matter) at the local landfills, so Rodale uses them as their compost make up. A mix of 3 parts leaves to 1 part cow manure is placed into windows on concrete plates. The temperature is recorded on a daily basis from 4 different positions. One thermometer is only 30 cm in length while its partner is 1 metre in length. The optimum temperature is at 60 Celsius to starve off any bad bacteria (e.g. e-coli).

The compost is monitored to check on decomposition and nitrogen loss. The nitrogen loss is recorded via liquid seepage through a grate that runs up the middle of the concrete pad. The liquid is tested for nitrogen levels to see what sort of losses has occurred to measure the potency of the compost. The losses are seen as quite minimal compared to straight compost that has been spread upon the soil (avge = 10 % for the concrete slab method, where the other can have as up to 20 times more loss).

International Context

The experimental crops have been going for over 26 years. The sizes of the crops are 18 by 92 metres and these were broken down into 3 by 6 by 92 metre sub plots. It is a setting of corn and soya bean which have been subjected to two ways of growing and farming. One is purely organic and the other is through conventional means. The difference between the two growing methods can be plainly seen in the image below.



The conventional crop in the foreground is quite withered and does not have the same foliage and crop density as opposed to the organic model in the background. The herbicide used for the spraying of the conventional crop is sourced via the Pennsylvania state university which gives the Rodale institute advice on which herbicide is the most natural choice on a year to year system. Information is recorded and is used as data to compare the differences in growth and yield between the organic and the conventional crops.

This part of the Rodale Institute is the only part of the 333 acre farm that is not certified organic. It is seen as a necessity to practically demonstrate the differences and because it has been an ongoing experiment, the validity is there along with the dozen plots which show that it is just not happening in one part of the acreage.

There is strong underlying belief in the regenerative food system to local communities and through CSA (community supported agriculture) it is a growing ideal that is catching on in a steady and sure measure. There is only 2% of farming land in the USA that is devoted to 100% organic coverage. Already the demand is out-stripping the supply (organic milk is the biggest example of this). While this fellowship was not exhaustive, it affirmed that there is a strong push toward the use of organic food and that this drive will continue to grow.

“Live the food”

Be part of the food cycle from initialising to consumption

Rodale Institute – Further Observations

Composting:

Rodale has perfected the manner in which it manages its composting unit. Rodale’s composting system has provided consistent compost and now been working successfully for years. The program is very scientific in the way it is managed and reported, but from an outsider’s point of view, there were some very simple commonalities that could be applied to a simple home compost trial.

International Context

- The base ingredients consisted off – 3 parts leaves / 1 part cow manure (from organic cattle)
- A drainage slab was used as a base for the compost to mature on. Any excess water was drained away from the compost into tanks. This water was used as an organic fertilizer as well.
- A special “turning” machine was used to mix and turn the compost to allow for evenness in its decomposition.
- Temperature probes were situated in 4 areas of the compost line. 1 at 30 cm and the other at 1 metre (8 probes per compost line in total).
- Results were consistently recorded to ascertain information regarding the compost.
- The compost management is seen as a vital cog in the organic farming.

Soil Management:

This soil management seemed to be the foundation to the very being of organic growing as seen in Rodale’s motto “healthy soil = healthy food = healthy people”. A majority of the research area in Rodale was directed to studying soil management. Many factors and research information is collected on a daily basis to study different effects in the soil. The fertile land in the Kutztown County certainly gave a great starting block to soil management, along with a healthy rainfall (1,000 mm a year on avge.)

Crop Management:

A major factor in organic crop growth is the ability to grow different types of crops at the same time. Many crops have been bred to specifically withstand certain disease and pests. There are also other types of crops that act as a natural deterrent to pests and diseases. Having a good understanding in this area is paramount if you want a profitable result from growing organic crops. The Rodale institute provides much of the data needed to understand crop management in order to reap higher yields due to good soil management.

Community Supported Agriculture (CSA):

CSA is a way for the food buying public to create a relationship with a farm and to receive a weekly basket of produce. By making a financial commitment to a farm, people become “members” (or “shareholders,” or “subscribers”) of the CSA. Most CSA farmers prefer that members pay for the season up-front, but some farmers will accept weekly or monthly payments. Some CSA’s also require that members work a small number of hours on the farm during the growing season. A CSA season typically runs from late spring through early fall. The number of CSA’s in the United States was estimated at 50 in 1990, and has since grown to over 1000. There is a perception from the supporters of CSA’s that the larger wholesaling supermarkets of organic produce are a detriment to the organic way of life. Big business is certainly where organic produce is heading and the supporters believe that this will create problems as it takes out the personal touch that is so prevalent in the CSA’s programs.

No Till System:

No-till farming is great - it protects soils from erosion, builds organic matter and saves the lives of millions of earthworms every year. But as generally practiced it also relies on herbicides - which are prohibited in organic farming, cost money and can harm the environment. The farmers and researchers at The Rodale Institute have been researching this issue for some time now. In 2002, farm manager Jeff Moyer teamed up with John Brubaker to build a front-mounted cover crop roller designed to achieve ‘mechanical kill’ instead of ‘chemical kill’.

International Context

What are some of the greatest advantages of a no-till roller system?

- Prevents soil erosion
- Builds organic matter in the soil
- Minimizes soil disturbance
- Living root systems in soil stimulate microbial activity including mycorrhizae
- One-pass system saves time and energy
- Does not rely on pesticides like conventional tillage
- Creates biomass above and below the ground
- Conserves water
- Recycles nutrients
- Creates channels for water, air and nutrients
- Increases soil tilth
- Improves aggregate stability.

Explanation on the no-till roller system's effect on soil biology.

Since the no-till system provides a continuous root zone it will create a very hospitable environment for the beneficial micro-and macro organisms that build up the soil and make water, air and nutrients more available to crop plants. This system also creates biomass, both above and below the ground, which adds organic matter that feeds these microbes and stimulates their activity. Some of the microbes (mycorrhizae fungi) produce hyphae, microscopic hairs that branch out from the root system up to 18 feet and produce glomulin, the "Super Glue" that binds soil particles and increases aggregate stability. The minimized soil disturbance also helps build up soil carbon reserves. When you also consider the benefits of better water infiltration and less erosion, it's easy to see how soil health is improved.

Source: <http://www.newfarm.org/>

Concluding Observation

Seeing the workings of the Rodale institute was a fascinating part of my visit. The scale of the actual farm put into practice what the institute is reporting on. You can see actual fields of crops that are under experiment and know that this is a working model of farming. The wealth of experience of the people working at Rodale is vast and is a very important cog in the generation of future developments in the organic field.

If ever there was an institution that the organic movement in Australia should be working closely with it is the Rodale Institute.

Old South Pearl Street Farmers Market – Denver, Colorado

Visits to 2 major farmers markets (1 in Los Angeles and 1 in Denver) were undertaken to gather input to how they work with the local industries (restaurants etc) and what part they play with the wholesaling chain.

Locality:

The location of the market is within easy reach to central Denver and is located in the heart of the older region of Denver. The Old South Pearl Street Farmers Market is very accessible and is situated in quite a communal housing district. Many a local could be seen wandering through the stalls looking for a great local product. Because of the rich growing area that Denver is located in, it is quite an attraction to good, organic growers looking to sell off their produce and to (hopefully) further their product in another business. The market is situated in a historical part of Denver and runs along the entire block on both sides. The street is cordoned off with no through traffic allowed.

International Context

The layout of the market certainly helped with the ease in which buyers could navigate through the stalls.

Atmosphere:

The relaxed atmosphere added to the communal spirit that the old south Denver farmers market held in its history.

Traders:

There is a showing of organic growers/sellers at the market, but not to the extent that the governing body intended. Samantha Robinson (Market Manager) said that *“Initially the intention to make the market 100% organic was always the first choice”*.

There was a ratio of about 3 to 1, natural to organic (natural does not mean organic in the true sense, only that the product comes from ‘natural’ means/ingredients in some way or form). The traders were all very open about what products they were selling and knowledgeable as well. They received the information regarding this fellowship with interest and were keen to gain an understanding of the trip.

Shoppers:

There was a mix of locals, local business people and out of town people present at the market. Quite a few restaurateurs from the local area frequented the market looking for that something special ingredient.

Quality of products:

The quality of the products available (especially perishable products from the farms) differed in quality. This was reflected in the seller’s prices and in the seasonality of the produce. The market itself was considered a small/medium operation. Apparently the Boulder Farmers Market (in Colorado), was one of the state’s most patronised market, which reflected in the quality and the availability of many different forms of produce.

Range of products available:

There were mostly fruit and vegetables products available at the market along with other non-produce items as well. There was no fresh meat/seafood/dairy available.

Wednesdays Farmers Market: Santa Monica, California

Locality:

The Farmers Market is conveniently located in the tourist hub of Santa Monica. The vibrancy of this tourist destination adds to the hustle and bustle of the market. With easy access from all directions this market is a great place to visit. With many food eateries nearby it is conveniently located for fresh produce purchase without the need for lengthy trips.

Atmosphere:

Because Santa Monica is a bit of a tourist Mecca, there is a pulsing atmosphere from the tourists who visit the market. This coupled with the locals adds to the vibrancy that is clearly evident in the air with many different types of farmers selling their wares.

Traders:

With almost 80 sellers, there was a great selection of produce. Laura Avery (Market Manager) is the main organiser and spokesperson for the Santa Monica Farmers market. Products such as mushrooms, vegetables, citrus, nuts, other fruit varieties, meat were available along with many more products.

International Context

Shoppers:

A mix of locals, tourists and business people were present. Quite a few people completed most of their weekly shopping such is the variety of produce. I was impressed with the number of local eateries who frequented the market to buy organic produce for their establishments. This would certainly add to the marketing of their business due to the fact that California is quite well known as a major producer of organic produce. With the shift towards healthier eating and the draw card of Santa Monica, this is certainly a great marketing tool.

Quality of products:

The overall quality of the products available were of an outstanding nature. Many farmers were organic based and I was impressed with the range and the quality of the produce. Very much a professional management system for Santa Monica's Farmers Market as evident in the smoothness of the market operation.

Range of products available:

As the market is considered one of the biggest in Los Angeles, the range of the produce available was quite astounding. It was almost possible to complete a weekly shopping at this market.

Knowledge Transfer: Applying The Outcomes

Transfer of knowledge to activities:

- **Fellowship report**
The objective of this report is for it to be used as the cornerstone of forthcoming activities. Activities will target a series of nominated bodies. Future dates will be booked as the release of the report draws nearer.
- **Developing a working organic farm to showcase the workings of organic growing (in conjunction with Rodale Institute)**
With the help of the Rodale institute, the objective would be to develop a small scale experimental organic farm in conjunction with the BRIT TAFE College. This would showcase soil management, growing ideas, crop care, harvesting methods etc. Inviting organic producers to be part of this experiment would be beneficial towards compiling data and information for better practices for organic farming. This would then be made accessible to any interested parties. The acquisition of some small acreage is needed. BRIT Echuca does have a small lot of acreage just outside the town limits. Lethlean has already developed a proposal to utilise this land.
- **A workshop with the Victorian Tourism, Hospitality Educators Network (VTHEN – during a state conference)**
The aim of this activity would be to collaborate with other TAFE institutes to promote the benefits of utilising organic produce to their students and industry contacts. Every second year a state conference is held at a host TAFE. This is due at the end of next year, 2008.
- **Utilising and passing on knowledge of organic products within my own coffee shop business**
The objective of this activity would be for Lethlean to personally get involved with the production, marketing and selling of organic based food products. This would be cumulated with organic knowledge that would be passed onto customers. As the patronage of the coffee shop consists of everyday life customers, this would allow the organic movement to find its way out amongst these people without having to set up a separate shop front, which would prove costly.

Recommendations

The following are recommendations to Government, Industry, and the Business sector, Professional Associations, Education and Training Providers, our Community and the ISS Institute.

Government – Federal, State and Local

Standardising organic certification across all states:

The need to obtain consistency in the certification of food products will help standardise the organic industry. There needs to be unified label/seal/mark that can be easily identified by all (consumers/wholesalers and farmers). A set of standards would accompany the certifying body that would be set out in plain and simple terms to help inform the specified market in a quick but effective manner. There are a number of bodies that currently certify organic products across the nation. The certification process from these certifiers can be a little confusing to the average consumer/farmer due to each certifier following their own process to certify a product. While the outcomes from this process from each body does obtain certification, the need to have a more consistent model that has a set and same standard of certification would certainly cut out the uncertainty of differing certification processes.

Provide increased funding for researching organic sustainability:

With the worsening conditions for our farmers due to climate change and the problems we are seeing in the eating habits and diets of our population, there needs to be an injection of funds into organic research to explore the benefits that are achievable through the growing and consuming of organic products. Organic soil management practices have demonstrated that it is vital to look after the land as we are slowly but surely eroding away the vital topsoil that is so precious to our farming industry. Soil management through organic practices not only helps retain healthy topsoil but adds to the level of it. Due to the organic farming practices there is also a decrease in water loss through evaporation and constant tillage of the land. As we live in the driest continent and are in the middle of one of the worst droughts on record, it not only makes sense to look into better soil management but is vital to our very own existence.

Local government needs to support and grow farmers markets:

The popularity of farmers markets is growing on a steady scale with more and more people realising the importance to buy from the local farmers. It makes vital sense to spend money in your local area, as money spent in the area stays in the area. This not only creates jobs but gives local communities a belief in communal spirit which can be, at times, lacking from these areas. Local government needs to support the farmers markets in their infancy so as to demonstrate faith in local businesses; creating a better living environment for all concerned.

Industry – various sectors

Investigation of better practices for organic farming:

The Rodale Institute is a world leader in the area of soils management and organic farming practices. The findings and teachings from the Rodale Institute are, and have been, an invaluable resource to the world of organic growing. Building firm links and partnerships with the Rodale Institute, organic farming practices that we utilise here in Australia would benefit and help further the growth of organic farms. The Rodale Institute would play a significant role in providing links to other organic farming bodies in the USA to which farmers would have direct contact with their overseas counterparts and utilise their knowledge to help with building a stronger and more consistent organic market here in Australia.

Recommendations

Professional Associations

The need for a major holding and distribution centre to meet the need of organic wholesalers:

A major holding and distribution company for organic products would be of great benefit to wholesalers and farmers alike. Presently the distribution of organic products to wholesaling supermarkets and the like, is being met by a range of smaller distributors. With the introduction of a major holding and distribution centre, the supply and consistency of organic produce would be greatly improved as a more organised system with effective logistics and marketing values would be implemented to help with the supply and delivery of organic produce (see UNFI as an example – <http://www.unfi.com/>).

Education and training

Courses to be developed centred on organic produce:

Courses developed around organic themes (soil management, growing practices, marketing, retail etc.) through teaching levels ranging from secondary to university would be advantageous to help develop the next generation who are focused on organics.

Need for more experienced teachers in the field of organic production and management:

If courses for organic themes are to be developed and delivered, the need for more experienced teachers/trainers/lecturers etc is paramount for this to be a serious and credible exercise. Utilising a cluster of experienced practitioners from the field of organics and getting them to liaise and work on the set up and delivery of organic based practices in a learning environment. This would need to be backed by the necessary certifying bodies and local and state governments. The need for overseas experience would be of an advantage to help further the study and delivery of such themes. Establishing an organic research institute specific to the delivery of organic based programs (ranging from soil and crop management, retail, marketing, cookery etc) would be ideal, or at least, the development of specific centres as part of current universities and TAFEs might be an alternative.

Community

The community in general, needs to be made aware of the advantages of using organic produce:

This issue is already highlighted as we see more programs being aired via the media in the advantages to health and lifestyle in using organic based products. Being able to utilise the media even more so with the help of known personalities/organic farmers/organic research institutes/accurate data etc will heighten the awareness of the general consumer of these advantages and lift the profile of organics.

Development of Community Supported Agriculture (CSA):

There are quite a number of established organic farmers that are within clustered groups throughout the different states of Australia. These organic farm clusters could look at forming a partnership in their own community and develop a Community Supported Agriculture (CSA). This would not only provide an array of different organic produce to the “shareholders” but also place more emphasis on using organic produce in the consumers’ everyday lifestyle and make it more accessible. In the USA CSA’s are continuing to grow and become a very vital part of peoples’ lifestyle. To utilise their experience and knowledge on the formation and management of CSA’s with the development of links and ties to these groups would be vital to the success of any CSA’s formed in Australia.

Recommendations

ISS Institute – conference, event, forums, workshops, seminars, showcase, overseas projects

The ISS to cluster a group of “foodie” fellows and have an event showcasing the different areas involved to attract public and government interest in those areas. A series of ongoing events are planned for 2008 and beyond.

Further skill gaps (farming practices)

Visit to organic growers in the USA to complete the organic food cycle:

During this visit to the USA the fellow was privileged to be exposed to a very small part of the organic industry and it was almost inconceivable to understand how much it is growing in the USA. Given the time constraints the fellow was unable to visit organic farmers. The consequence of this is that a vital cog of the organic food cycle has not been explored. It is essential to visit and experience a couple of the larger organic farms to gain first hand knowledge to help complete my organic experience. Having a working knowledge of how large scale organic farming is managed in the USA would be advantageous to our local group of organic farms. There are, more than likely, systems and logistical patterns that have been experimented with and established by these large organic farms to help better the farming process.

Revisit wholesalers / distribution centres / Rodale to build on and develop relationships with these groups:

The need to revisit and follow up on the information already gathered from the USA from areas involved with the Fellowship would strengthen the understanding of the organic movement in the USA. The need to keep these links and relationships in a continuing growth phase is vital to the organic movement here in Australia. As the organic movement in the USA is growing at a rate of around 10 – 15 % every year, and coupled with the magnitude of the population, there is so much more we could achieve by researching and adopting ways and means that these above areas specialise in.

References

United States department of agriculture

<http://www.usda.gov/wps/portal/usdahome>

Rodale institute

<http://www.rodaleinstitute.org/>

New Farm

<http://www.newfarm.org/index.shtml>

Whole Foods Market

<http://www.wholefoods.com>

Albert's Organics

<http://www.albertsorganics.com/>

Wild Oats Natural Market Place

<http://www.wildoats.com/u/home/>

Local Harvest Web Directory

<http://www.localharvest.org/>

Santa Monica Farmers Market

http://santa-monica.org/farmers_market/

Pearl Street Farmers Market

http://www.oldsouthpearlstreet.com/fm_1.htm

Organic Directory

<http://www.theorganicsdirectory.com.au/>

United Natural Foods Incorporated

<http://www.unfi.com/>

Attachments

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Page 44 – 48: report on Albert's Organics – Denver, Colorado, USA

Page 48 – 53: report on Santa Monica Farmers Market, Santa Monica, California, USA



Name of organisation: The New Farm – Rodale Institute
Name of contact: Dr Paul Hepperly – new farm research & training manager (27 years experience)
Associates to Rodale: Greg Bowman – online editor (15 years experience),
 Maria Pop – training coordinator (10 years experience),
 Dan Sullivan – senior editor (8 years experience)
Date: 20/9/2006 – 22/9/2006
Location: Kutztown
County: Redding
State: Pennsylvania

1. What certifies an area as a true organic farm in the USA

- a. What is the process towards true certification of organic land for the growth of organic based food products?

The organic certification is based on a law passed through US Congress in 1991 and the development of Standards for Systematic Labelling based on definitions which were agreed upon by stakeholders. The USDA National Organic Standards did not become enacted until late 2002.

- b. Is there a means to improve land that once did not meet the standards to be classified as certifiable organic growing area?

The National Organic Standards contains a list of restricted practices such as chemical applications, use of irradiation, genetic modified organism use, and use of bio-solids which cannot be used with 3 years of achieving certified organic status. Producers need to do the positive practices in terms of soil conservation, improvement, record keeping and review to get and maintain their certified status.

2. What processes have improved the farming of organic produce

- a. Has there been any major success in improving the way organic farming operates?

Yes as the certified process is dependent on record keeping it allows for a system of tracking production and use of these products. Non-certified organic generally lacks these records. Also the farm visits allow for a third person inspection to catch unauthorized practices and correct them.

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- b. How hard was it back in the early conception of mass organic farming, say 20 years ago?
The growth of organic marketplace has made it easier for farmers to identify substantial areas for product sales. This facilitates the growth of individual and collective production, processing and distribution of organic foods.
- c. Is there scope for further improvements to help streamline the systems involved and what are some of the future ideas?
With advent of sophisticated data analysis, tracking and communication it is now possible to have specialized marketing for premium products directly to consumers. This will influence the development of organic businesses.

3. Has there been any help from the government to improve organic farming systems

- a. Are there subsidies/grants available to help with this process?
As the government increasingly becomes attuned to the economic opportunities of the evolving organic marketplace they are placing more incentives to help farmers transition to organic including education and capitalization of initial production dips which may occur.
- b. What dealings have you had with the government with in regards to improving farming organic farming systems?
Governments are looking increasingly to organic farming systems for solutions to some of the pollution problems associated with conventional agriculture. Our local government is very interested in the data we have on greater energy efficiency and greenhouse gas trapping in organic systems compared to conventional production systems.
- c. Is information related to other farmers/suppliers?
Yes mainly through website articles and field days.
- d. Do the larger wholesalers help in any way in developing better farming processes?
Large wholesalers are entering the organic marketplace including Wall Mart.

4. Is there any accredited training that organic growers can study for

- a. Is there any training available in organic farming? – If so, with whom?
There are few programs but the interest in becoming fruitful for some organic programs and departments and many initiatives in the area of sustainable agriculture and agro-ecology.
- b. What sort of courses are available here in the USA
University of California Davis, Washington State University and North Carolina State University are some of the US Institutions with courses of studies in Sustainable Agriculture. Only Washington State has a program in Organic Agriculture.

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5. In trying to improve the organic farming system, has it been a case of a lack of money/resources/experience/government red tape – Any other

- a. What would you say were the most inhibiting factors in trying to improve your farming systems?

The lack of information in the area of benefits and challenges to Organic Agriculture transition.

- b. What would be the ideal method to improve your farming system?

Supported transition through education and financing of the organic farming transition model.

6. What do you see as the future direction for improving organic farming systems

- a. In what area do you think should be improved to help with farming systems?

More support for organic agriculture, research, education and extension. Better projection of long term studies into basic advantages and constraints.

- b. Should the organic farming look at becoming a lot more mainstream so as to be able to compete with main stream farming?

Yes, because as an ecological approach diversity is needed for the system to act optimally.

- c. Do you think it is an achievable goal? – Why?

Yes. Because demand and returns are high and the biology is proven to work when properly applied.



The Rodale's Institute main sign

Note the motto "Healthy soil, Healthy food, Healthy people", which what the institute is all about. Promoting a healthier outlook for all by the means of looking after the soil and the food it produces.



The Rodale's Institute book store

The book store houses different publications, all of which are directed towards organic. The Rodale press (which is part of the Institute) has many a publication on sale here. You can also sample and buy small organic commodities such as spreads and drinks to consume.

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The Rodale's main reception

The reception office is part of the dwellings of the original farm of which became the institute. This is where you first get your taste of the Rodale staff. Sharon Riker (administrative assistant to Rodale) was my main contact via email and phone calls and was of great assistance in organising my stay at the residence located on the farm.



Rodale's 22 year ongoing experiment

This is part of the experiment that has been running for 22 years. Its main aim is to show the differences in 3 growing methods of some basic commodities (Soya bean and corn). 2 commodities are grown utilising organic means with the 3rd using conventional means (pesticides etc.) it was only meant to be a shorter term experiment but has continued due to its results and the invaluable evidence



Educational plaques

At different parts of the farm are these educational boards that detail what is being developed and recorded in certain areas of the Institute. Valuable reading for the un-initiated into the organic cycle that is delivered by the Institute.



Compost at Rodale

Even though we think of composting as a simple exercise, the Rodale institute has perfected its methods in cultivating the best possible compost. Through a series of temperature checks, the turning of the compost, the drainage of moisture, the collection of that moisture and a ratio of garden matter to manure, the Rodale has developed compost that is truly organic and is vital to the success of any organic farming.

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The Rodale's acreage

The size of the Rodale Institutes acreage is very impressive (333 acres) and allows for quite a few experiments to be conducted on large scale production which mirrors the wants and needs of organic farmers and growers in a more "real" situation. There fore the data collected at the Rodale is truly seen as meaningful and leads the way in organic education.



Offices at Rodale

The general offices at Rodale are located with in the original farms sheds. They have been outfitted to accommodate the employee's needs to conduct their work in a truly professional manner.



CSA at Rodale

Community Supported Agriculture (CSA) is part of the Rodale institute. It is privately run by a couple who follow organic ethics in their farming and harvesting of products. The CSA's are a large part of the organic movement in the USA with many County's adopting and supporting this way of supplying organic product to the local community.



Local farmers

As you can see in the picture, the Rodale Institute is nestled amongst conventional farms. Many local farmers take advantage of having the institute so close and yet some are quite happy to remain conventional.

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Guest quarters

This is the guest house where I lodged during my stay at Rodale. Generally it can take between 10 to 18 guests, depending on sleeping arrangements. It is located right next to reception on the grounds of the institute so it is very handy for visiting groups of people who are attending any type of training workshop at the institute.



Practical education

On the grounds of Rodale is a collection of growing herbs and plants showing the ease to which many different types of plants can be grown in harmony with each other while utilising organic growing techniques.



Quality Organically Grown Fresh Food.

Name of organisation: Albert's Organics Distribution centre
Name of contact: George Wright – fresh category director (16 years experience)
Date: 15/9/2006
Location: Aurora
City: Denver
State: Colorado

1. What organic food bodies (state/federal) do you have to deal with in the running of Albert's Organics?

a. What guidelines (if any) do you need to follow from these bodies?

We deal with both the USDA and QAI (3rd party organic certification) in following the regulations of National Organic procedures.

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- b. Are you under obligation/guidelines to detail any type of report to these organic bodies? And if so, how is this done – information via email/compliance auditing etc...
We comply with stringent rules regarding the operation of our warehouse facilities. This is done in both email and hard copy written format.

2. What support do you receive from local/state/national government bodies?

- a. What government departments did you have to deal with?
The USDA (United States Department of Agriculture) is our main government body we deal with.
- b. What sort of bureaucracy red tape has the business encountered that may have had significant bearing on the business?
The regulations for Organic Compliance are strict and we comply to the letter to maintain our status as an organic distributor. We do not regard this as “red tape”, but as a necessary process for the Organic Rule to work.
- c. Is there continuing communication with government bodies so as to stay up to date with relevant information in relation to certified organic produce? How is this received/acted on?
We receive updates from the USDA regarding the organic process.

3. How have the wholesalers been supportive of Albert's organics?

- a. What sort of support/information do you receive from the wholesalers you supply to? Do you find this information influencing your selection of products that you stock?
Because we are a wholesaler, we sell directly to retail accounts. New product requests from retailers play an important role in our new item selection process.
- b. Do you receive reports from the wholesalers on product to customer reaction/thoughts on organic products? – How is this achieved?
Our salespeople receive direct requests from retailers for organic products and we review all requests on a case by case basis.

4. How are new products sourced and what guidelines are in place to ensure consistent quality (to your standards) of your current suppliers/products?

- a. Is there a quality standard that new products must comply with so as to be part of your distribution list? – do you have a copy of these guidelines?
Items with organic certification, by definition, meet our guidelines. “Natural” products must meet industry standards, ie. no preservatives, no artificial ingredients, antibiotic-free, hormone-free, etc, to be considered as a new item.
- b. Is there a need to chase new suppliers/products or are they constantly presenting themselves to be part of your products list?
We both source out new items ourselves and are continually being presented with new items.

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- c. Does the company visit the organic farms (in some way) that supply products that you have so as to substantiate the addition of this product on your supply list? – And if so, does the company see this as worthwhile exercise and is this publicised in some way to promote the supplier/grower so you can be seen as working with the local regional growers?

On the produce side, we often visit the growers we buy from. On packaged items, we do visit when we can, but it is not part of an organised process.

5. Who are your main buyers – locals/intrastate/interstate/international?

- a. Do have an available list of the wholesalers that you supply to?

Again, we are the wholesaler, so we sell to retail accounts. Our customer list is considered confidential, but includes the majority of natural food retailers in the U.S.

- b. Which product has grown the fastest?

On the produce side, packaged salads have shown tremendous growth. This has been tempered with the recent E-coli incident with packaged spinach. On the packaged side, organic milk is experiencing double-digit increases and is only limited by supply.

- c. What sort of interest has been generated from international buyers (if any) – do you deal with any Australian exporters (who)? If no – why?

We are not currently dealing with international buyers. We do buy some specialty items from an Australian importer.

- d. What is the general feeling about the natural/organic produce? – is the demand for this type of commodity in a continual growth stage? – What factors do you think have attributed to this? (lifestyle/lower costs/availability)

Interest and growth in organic produce is at an all-time high. Conventional consumers are discovering the health benefits of organic and are finding those items in traditional grocery stores. As demand has increased, the costs of growing organic have decreased, making it a much more affordable commodity.

- e. Do you receive information from the wholesaler on what new organic products could be added to your supply list?

We receive information from vendors and growers on the availability of their products.

- f. What do you see as the main obstacles that Albert's organics needs to control/ research/understand to further the organic market?

Educating conventional retailers on the proper marketing and merchandising of organic items in their stores.

6. What scope do you see for growth – local/intrastate/interstate/international?

- a. Is there still room for growth? – What is the business' main target groups and why? (local/ intrastate/interstate/international)

Even with double-digit growth, organics have only scratched the surface of consumer opportunities. Conventional retailers hold much potential in the growth of the organic market.

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- b. What factors are affecting your growth, if any? – is there measures in place to counter act this? – is due to: state government/organic bodies/local council/infrastructure etc.

Transportation costs have risen dramatically in the past year causing some logistical challenges.

- c. Do you rely heavily on clientele/market research to decide in what areas the business will work towards to help nurture and grow into a profitable domain?

We utilise market research, such as SPINS data, and trade group research, such as the Organic Trade Association to review trends in the industry.

7. Could you see this business growing to be an international venture Yes/no – reasons?

- a. Has there been any interest in looking into Australia as a market venture?

Not at the present time.

- b. If so, are there any limiting obstacles that would stall such a venture?

Transportation costs and logistics coupled with the perishability of our products make it an iffy proposition.



Alberts Organics

This is the main entrance to Albert's organics in Aurora, Denver, Colorado. It is quite a large distribution centre which is common for United Natural Foods Inc. As indicated beforehand, United Natural Foods Inc is a USA's premier certified organic distributor with a national distribution service second to none.

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Alberts Organics

Another picture depicting the size of the distribution centre. There are about 18 service entrance for semi trailers to load up from, depending on what goods are being transported will dictate which entrance they will load from.



Alberts Organics

This is George Wright (on the left) who is the fresh category director for Albert's organics. George was an invaluable source of information and I am pleased to say, helped me out with some follow up information once I had returned back to Australia.



Name of organisation: Santa Monica Wednesday's farmers market
Name of contact: Laura Avery – market manager (24 years experience)
Date: 27/9/2006
Location: Santa Monica
City: Los Angeles
State: California

1. What is the collective view on wholesale organic food supermarkets?

- a) Is there much communication between intrastate and interstate farmers markets?
Farmers markets in the US are fairly diverse, as each state operates markets according to local rules and regulations. California is the only state that I know of that supervises its certified farmers' markets (CFM's) at a state level. There are several loosely organized farmers' market associations in California, the majority of which are governed by local market management on behalf of their markets. Two organizations, Southland Farmers' Market Assn. (SFMA) and the Federation of California Farmers' Markets are organisations that represent markets on wider issues. In general, market managers and associations operate independently. Intrastate communication consists of an occasional phone call and annual gatherings at conferences.
- b) Do you believe that this is / is not beneficial?
It depends. Markets have effectively come together in the past to testify at regulatory and legislative hearings. In general, however, California markets have diverse goals and objectives and are divided on how CFM's should be operated.

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- c) Do the wholesale supermarkets have much contact with the farmer's market directive body or vice versa?

No they don't, although Whole Foods Markets is researching the concept of setting up farmers' markets in its parking lots, and has issued a policy statement that they have a goal of making a percentage of their purchases directly from farmers.

- d) Is there much information related between the markets and the wholesale supermarkets? – is this happening and if so does it work both ways?

There is little information going back and forth. Whole Foods requested a table at the SM CFM, but it was denied, since tabling is no longer permitted at Santa Monica CFM's.

2. What is the future direction of farmers markets?

- a) How is this decided?

The California Department of Food and Agriculture (CDFA)'s Direct Marketing Program is responsible for collecting market fees, enforcing the conditions of Direct Marketing around the state and holding Advisory Committee meetings. The Advisory Committee looks to industry for a consensus on the future direction of farmers' markets; however, as stated earlier, industry has many varied viewpoints on the future of CFM's, so markets around the state differently.

- b) Has the Denver farmer's market history been favourable?

The Wednesday Santa Monica Farmers Market has had a very favourable history, in terms of service to the community, service to California farmers, service to local business, and as a popular City sponsored program.

- c) What would you look to have changed from the past – if anything?

This is difficult to answer, since the CFM program was in its evolutionary phase when the Wednesday market first opened, and we learned as we went along. On a State regulatory level, new rules needed to be written in order to control abuse of the system. On a local management level, parking and congestion issues were present.

- d) How does the future direction of the market look?

The market just celebrated twenty-five years of operation. Market programming is being extended to the City's libraries, and is collaborating with other City departments such as CityTV, Environmental Programs, and the Big Blue Bus and is upholding the City of Santa Monica's Sustainable City objectives.

- e) Is there a very common ground that everyone involved agrees on or is it quite difficult and time consuming to move ahead?

Market management is working on updated Mission Vision and Values. On a State level, as stated above, common ground is not found and "moving ahead" is difficult and time consuming.

- f) Does the market look outside for direction?

Two of the Santa Monica's four CFM's are members of Southland Farmers' Market Association and I serve as President of the SFMA Board. I work closely with SFMA's Executive Director and find the organization's assistance very beneficial.

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- g) What needs to be looked out (in your opinion) to keep the market viable in the future?

The Santa Monica CFM's have established a reputation for integrity and excellence. It is very important that we remain focused on our primary goal of promoting California farmers, and to continue to educate the public about the importance of CFM's.

3. What kind of support (financially/emotionally) have you received and through which channels has it come from?

- a) Is it just local or other?

The Santa Monica CFM's are funded by farmer stall fees. Some City services, such as security, are provided by the City; others, such as maintenance, are paid for out of market revenue. We are looking to apply for grant funding to assist in some of our nutrition education programs

- b) How has the community embraced the market and to what extent?

In the most recent (2002) Citywide survey, 85 percent of Santa Monica residents say that they frequent the farmers' markets.

- c) Is there a big push from the local/state government to see the markets succeed?

Most markets are perceived by local and state governments as a good thing, and they are very popular politically – many politicians love to open a market in their district. A market's success depends on many factors, including location, management and promotion.

- d) What was the initial start up of the farmers market like?

The Wednesday Santa Monica Market had a very good opening, due to its excellent location and pre-start publicity. For subsequent markets, we worked with neighbours and local businesses to ensure buy-in from constituents.

- e) How do you raise awareness for the market?

We focus on market-centred events such as a strawberry shortcake giveaway, chef demos, book signings, and tastings

4. Is the farmers market involved in any kind of exportation of its products?

- a) Is it local buyers only or is there a growing trend for exportation possibilities?

Some growers sell via wholesale channels in addition to selling at the market. Some of the buyers who come to the market ship products to the east coast and Canada.

- b) What links are followed to strengthen the possibilities of this?

We provide preferred parking for chefs and buyers at the market. Also, many farmers now have websites that advertise their products.

- c) Is there much paper work involved in the organisation and hosting of the farmers market?

Not in terms of reporting to outside entities. We send a quarterly fee to CDFFA, and apply for annual ag and health permits. Our internal accounting and data maintenance takes a portion of everyone's time each day.

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- d) Does the likelihood of exportation of farmers market produce to interstate a possibility?

Farmers and buyers act on their own with regard to selling agricultural products.

5. Has it been smooth sailing in setting up the markets?

- a) What intense problems have come about at the start up stages?

There are always a host of things to consider when opening a market, depending on the local community. Many concerns come from local businesses that fear a lack of parking on market days.

- b) Was it producers/community/businesses or government that provided the most headaches?

Depending on the individual market, some of all of the above.

- c) Are there still any major underlying problems – expand on?

The markets are in many ways victims of their own success. Ongoing problems can be: integrity, access for non-farm vendors, increased competition among farmers bringing in the same things, local development taking away parking.

6. How are farmers/producers sourced for the market?

- a) Is this completed through a add hock system or is it governed thoroughly?

The Santa Monica CFM maintains a waiting list. When a space pens up, growers who are on the list are considered for a selling space. Occasionally, a producer who has a unique product applies for a space and is accommodated if possible.

- b) What standards are expected from producers who are part of the market?

All participating farmers sign the market rules, which detail overall market operating procedures.

- c) Is their a radius cut off point for producers or is it a case of if they can get to the market then that's ok?

The markets have limited space and clearly defined boundaries. Sometimes producers need more or less space depending on the season, so more growers can be accommodated at certain times of year.

- d) Is there a limit to the amount of producers who supply the same product?

Market rules stipulate what products can be admitted to the market based on need and current supply. However, it is more difficult to regulate the products of farmers who are already in the market. Market management is considering putting a limit on the number of new products a grower can introduce to the market mix.

- e) What sort of help is provided by the governing body to new farmers to the market?

Farmers are briefed by market management on general operating procedures, and the market rules are also comprehensive. Farmers are given tips on how to present and sell their products, and farm conferences often offer workshops on merchandising. Also, farmers like to check each other's display.

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7. How important has it been to maintain a governing body to help with the livelihood of the market?

- a) Was this an initial movement from the start or was there a gradual need for it?
The Santa Monica CFM's are City-operated, so there is no governing Board to oversee market operations. Market managers are responsible for daily operations, and appeals to managers' decisions or market rules go to managers' supervisors.

8. Do any of the producers value add to their "raw" product?

- a) What are the limitations to what a producer can do to his/her product?
Yes, many producers are adding more and more value added items to their product line. The Departments of Agriculture and Health apply restrictions to how "processed" a product can be. The CDFA advisory committee has taken up the task of writing a definition of "processed" products, but the regulation has yet to be brought forward for hearings.
- b) Is it encouraged by the governing body for this to happen?
Markets allow or disallow products as they see fit. State enforcement is behind on enforcing the sale of processed agricultural products.
- c) What has been the response to these new products from the buyers/community?
Customers like the value-added products, and are disappointed when farmers are not allowed to sell them.
- d) Do you see a future for more involved value added on organic products?
Value-added products are definitely here to stay, but they need to be regulated as to how much a product can be processed before it becomes a non-agricultural product. Examples of this are: honey barbeque sauce made with a teaspoon of honey, apple pies, or vegetable pate. State regulatory agencies need clear guidelines to do enforcement, and current regulations do not contain them. Amendments are pending.



Santa Monica Farmers Market

The Wednesday Santa Monica farmers market is in its 25th year of operation and is continuing to grow stronger every year with a huge mix of produce from mushrooms to buffalo meat.

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Santa Monica Farmers Market

The market is very well patronised with a large cross section of customers making their way through the stalls. Many a foodie can be spotted gathering their daily produce for local café's and restaurants. The market covers 4 street (in cross formation) and has at least 75 vendors with a large waiting list.



Santa Monica Farmers Market

Laura Avery (the market manager), was my contact for the market and was extremely helpful both before and on the day of my visit. It is certainly a very busy and vibrant place with an amazing range of goods and aromas. I must also thank Laura for her follow up work with me when I arrived back home as well.
