Organic Trade Association's 2013 Organic Industry Survey

Intro

*Organic Trade Association* (OTA) 2013 Organic Industry Survey

*Nutrition Business Journal*, on behalf of the *Organic Trade Association*, is conducting an annual survey of the organic products industry.

The objective of this survey is to gauge the size and growth of the organic industry in North America by product category. This information will help OTA raise the profile of the organic industry, accurately presenting its contribution to the national economy and building credibility for its members in the eyes of the media, the government and the private sector.

We ask you to provide information about your company and to share growth estimates for several food and product categories. We understand that information about your company's sales may be private, and we assure you that your responses will remain confidential. Figures will be used to construct an aggregate model of the industry, in addition to a list of top organic manufacturers according to revenue ranges (specific figures derived from this survey will not be detailed). For the success of this ambitious project, it is important that each company fill out a survey. Respondents will receive a free copy of the executive summary of the OTA 2013 Organic Industry Survey.

If you have any questions, please contact NBJ Market Intelligence Analyst James Johnson at jjjohnson@nutritionbusiness.com or at (303) 998-9336 or OTA Associate Director, Conference and Product Development, Angela Jagiello at ajagiello@ota.com or at (802) 275-3831.

If you would like a hard copy of the survey to reference while gathering the information needed to complete the survey, please contact James at the e-mail above or follow this link: <link to come>. 
Respondent Information

1) Please enter your contact information. E-mail address and company name required to receive Executive Summary of survey. Note: This is a confidential survey. Further contact, if required, will be solely for the purpose of clarifying survey responses.*

First Name:: _________________________
Last Name:: _________________________
Title:: _________________________
Company:: _________________________
Subsidiary of (if applicable):: _________________________
Country:: _________________________
E-mail address:: _________________________
Phone Number:: _________________________

2) Please classify your company's core business:*

( ) Organic Food Product Manufacturer/Marketer
( ) Organic Food Grower
( ) Non-Organic Food Product Manufacturer/Marketer
( ) Personal Care Product Manufacturer/Marketer
( ) Functional Food Product Manufacturer/Marketer
( ) Pet Foods/Pet Supplements Manufacturer/Marketer
( ) Fiber Manufacturer/Marketer
( ) Flower Grower/Marketer
( ) Household Cleaner Manufacturer/Marketer
( ) Supplement Manufacturer/Marketer
( ) Organic Seed/Rootstock/Seed Treatment Producer/Seller
( ) Contract Manufacturer
( ) Distributor Jump to Q6
( ) Broker Jump to Q6
Inventory Contraction - Manufacturer

Inventory Trends

The next questions address your experience with inventory management.

3) How did your overall inventory levels change in 2012 versus 2011?

( ) New company
( ) Down more than 20%
( ) Down 10% to <20%
( ) Down 0% to <10%
( ) About even
( ) Up 0% to 10%
( ) Up >10% to 20%
( ) Up more than 20%

4) If overall sales were down in 2012, what was the biggest factor?

( ) New Company
( ) Sales weren't down
( ) Reduced orders due to distributor/retailer inventory reduction
( ) Reduced orders due to decreased consumer purchases
( ) Reduced sales due to price decreases
( ) Reduced sales, not sure why
( ) Reduced sales for other reasons (please specify): _________________

5) How did order levels from distributors and direct-order retailers change in 2012 versus 2011?

( ) New company
( ) Down more than 20%
( ) Down 10% to <20%
( ) Down 0% to <10%
( ) About even
( ) Up 0% to 10%
( ) Up >10% to 20%
( ) Up more than 20%
( ) Not Applicable

End of Page: Jump to Q8

Inventory Contraction - Retailer

Inventory Trends

The next questions address your experience with inventory management.

6) How did your overall inventory levels change in 2012 versus 2011?

( ) New company
( ) Down more than 20%
( ) Down 10% to <20%
( ) Down 0% to <10%
( ) About even
( ) Up 0% to 10%
( ) Up >10% to 20%
( ) Up more than 20%
7) If overall sales were down in 2012, what was the biggest factor:

( ) New Company
( ) Sales weren't down
( ) Reduced sales due to decreased consumer purchases
( ) Reduced sales due to price reductions at retail
( ) Reduced sales, but I don't know why
( ) Reduced sales due to another reason (please specify):: ________________

8) 2012 Employees:

(Please enter "Not Sure" if you don't know)

Total number of full time and full-time equivalent employees:: ________________
Total number of part-time/seasonal employees:: ________________

9) Please indicate how employment levels in 2012 compare to previous years and growth you expect for 2013:

<table>
<thead>
<tr>
<th></th>
<th>2012 compared to 2011</th>
<th>2013 compared to 2012</th>
<th>2012 compared to 2007</th>
<th>2012 compared to 2002</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
<tr>
<td>Part-time/Seasonal</td>
<td>___</td>
<td>___</td>
<td>___</td>
<td>___</td>
</tr>
</tbody>
</table>
10) Please estimate the percentage of your employees operating in the following segments in 2012:

If you do not have any employees in a category, please enter "0" or leave blank.
Total should sum to 100.

_______Research & Development
_______Marketing
_______Sales
_______General or other office personnel
_______Warehousing
_______Production
_______Farming
_______Retail
_______Volunteers
_______Other

End of Page: If your core business type is Trade Association, Organic Certifier, or Consultant/Service Provider, Jump to Q151

Overall Sales

Company Sales

Note: For the following questions, please keep these definitions in mind:

"Organic" includes products that are certified as:

- "100% Organic"
- "Organic" (95%+ organic)
- "Made with organic ingredients" (70%+ organic)

Organic Does NOT include products that are made with less than 70% organic ingredients

11) 2012 gross TOTAL PRODUCTS dollar sales:

( ) Not Sure
12) 2012 gross ORGANIC PRODUCTS dollar sales:

( ) Not Sure
( ) $0 to $50 thousand
( ) >$50 to $100 thousand
( ) >$100 thousand to $0.5 million
( ) >$0.5 million to $1 million
( ) >$1 to $2 million
( ) >$2 to $3 million
( ) >$3 to $5 million
( ) >$5 to $10 million
( ) >$10 to $15 million
( ) >$15 to $20 million
( ) >$20 to $25 million
( ) >$25 to $30 million
( ) >$30 to $40 million
( ) >$40 to $50 million
( ) >$50 to $60 million
( ) >$60 to $80 million
( ) >$80 to $100 million
( ) >$100 to $150 million
( ) >$150 to $200 million
( ) >$200 to $250 million
( ) >$250 to $300 million
( ) >$300 to $400 million
( ) >$400 to $500 million
( ) >$500 to $1 billion
( ) >$1 billion
Organic Sales

Information about your company's organic sales

Note: "Organic" includes:

- "100% Organic"
- "Organic" (95%+ organic)
- "Made with organic ingredients" (70%+ organic)
13) Please provide percentage breakdowns of your company's TOTAL 2012 organic and conventional sales
*If you do not know, please leave blank. If you had none, please enter "0". Total should sum to 100.*

- Organic Food & Beverage (see above definition)
- Non-Certified Organic Food & Beverage (contains organic but does not fit above definition)
- Conventional Food & Beverage (contains no organics)
- Organic Non-Food
- Conventional Non-Food

14) What is the breakdown of your 2012 sales of ORGANIC products by organic category?
*If you do not know, please leave blank. If you had none, please enter "0". Total should sum to 100.*

- 100% organic
- 95%+ organic
- Made with organic ingredients (70%+ organic)

15) What percentage of your TOTAL sales were for products containing some organic ingredients but less than 70 percent organic ingredients
*Please enter a whole number from 0 to 100. If you do not know, please leave blank.*


16) What is the breakdown of your company's 2012 sales of organic products by region?
*If you do not know, please leave blank. If you had none, please enter "0". Total should sum to 100.*

- United States - domestic sales
- United States - agents or brokers for export
- Canada
- Mexico
17) Please give the percentage growth of your company's gross ORGANIC sales

Please enter percentages as whole numbers (For example 4 for 4%). If you do not know, please enter "Not Sure". If you weren't in business, please enter "NA".

Growth in 2010: _________________________
Growth in 2011: _________________________
Growth in 2012: _________________________
Growth forecast for 2013: _________________________

Organic Seal

18) Do you display the USDA Organic seal on any of your products?*

( ) Yes
( ) No

Organic Labeling

USDA Organic Seal/Organic Raw Materials
19) Is a lack of a dependable supply of organic raw materials limiting your company from generating more sales of organic products?

( ) Never
( ) Rarely
( ) Occasionally
( ) Frequently
( ) It's a major problem

20) How do you expect your use of organic ingredients to change over the next 3 years?

( ) Greatly increasing percent organic ingredients/products
( ) Somewhat increasing percent organic ingredients/products
( ) Steady percent organic ingredients/products
( ) Somewhat decreasing percent organic ingredients/products
( ) Greatly decreasing percent organic ingredients/products

Organic Raw Materials

21) Which organic raw material supplies need to be more reliable:

#1: Most important product needing dependable supply: _________________________
#2: Second most important product: _________________________
#3: Third most important product: _________________________

Canada

Canada
22) Did you source any ingredients from Canada in 2012?*

() Yes
() No Jump to Q24

_______________________________________

Canada Sourcing

Canada

23) What is the value (in thousands of U.S. Dollars) of the ingredients you sourced from Canada in 2012?
Please enter "NA" if you don't know

_____________________________________________________________________

Canada 2

Canada

24) Were any of your products available/sold in Canada in 2012?*

() Yes
() No Jump to Q27

_____________________________________________________________________

Canada Selling
Canada

25) What is the value (in thousands of U.S. Dollars) of your products sold in Canada in 2012?
   Please enter "NA" if you don't know

____________________________________________

26) If you are a U.S. based company, how has the U.S/Canadian Organic equivalency agreement signed in 2009 affected your sales to Canada?

( ) New Company
( ) Greatly Reduced Sales
( ) Somewhat Reduced Sales
( ) Sales About Even
( ) Somewhat Increased Sales
( ) Greatly Increased Sales
( ) Not a U.S. based company

Canada 3

Canada

27) Are you a Canadian company?*

( ) Yes
( ) No Jump to Q31
28) What was the value **(in thousands of U.S. Dollars)** of the products/ingredients you imported into Canada from the US in 2012?  
*Please enter "NA" if you don't know*

______________________________________________________________________________

29) Do you currently or do you plan to use the Canadian Organic seal on any of your compliant products?

( ) Yes, using it now  
( ) Yes, in the next year  
( ) No  
( ) Not sure

30) How has the U.S/Canadian Organic equivalency agreement signed in 2009 affected your sales to the U.S.?

( ) New Company  
( ) Greatly Reduced Sales  
( ) Somewhat Reduced Sales  
( ) Sales About Even  
( ) Somewhat Increased Sales  
( ) Greatly Increased Sales

______________________________________________________________________________

**Europe**

31) Were any of your products available/sold in Europe in 2012?*

( ) Yes
32) What was the value (in thousands of U.S. Dollars) of your products sold in Europe in 2012?

Please enter "NA" if you don't know

33) If you are a U.S. based company, how has the U.S/European Organic equivalency agreement signed in 2012 affected your sales to Europe?

( ) New Company
( ) Greatly Reduced Sales
( ) Somewhat Reduced Sales
( ) Sales About Even
( ) Somewhat Increased Sales
( ) Greatly Increased Sales
( ) Too early to Tell
( ) Not a U.S. based company

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Sales Channel Breakdown

34) Sales Channel Breakdown: Please provide the percentage breakdown of your company's TOTAL organic sales in 2012.

If you are a retailer, enter "100" next to the category that describes your type of store. If you do not know, please leave blank. If you had none, please enter "0". Total should sum to 100.

_______National Natural Grocery Chain (e.g. Whole Foods)
_______Regional Natural/Health Food/Co-op
_______Mass-market Grocery (e.g. Kroger)
_______Club/Warehouse Store (e.g. Costco, Sam's Club)
_______Mass Merchandiser (e.g. Wal-Mart)
_______Farmers Market/CSA
Product Categories

Organic Sales Categories

Meat & Seafood: Beef, Lamb, Pork, Poultry, Fish, Canned Fish & Seafood, Canned Meats & Meat Spreads
Dairy: Milk/Cream, Cheese, Butter, Eggs, Yogurt, Ice Cream, Sour Cream, Cottage Cheese, Canned Milk
Snacks: Chocolate/Candy Bars, Other Candy & Gum, Nuts, Salty Snacks, Nutrition Bars
Condiments: Salad Dressings, Salsa, Dips, Jams & Preserves, Ethnic Sauces, Ketchup, Other condiments, Spices, Oils, Shortening, and Cooking Sprays, Sugar, Syrup, and Sweeteners
Personal Care: Hair Care, Skin Care, Cosmetics, Oral Care, Aromatherapy/Fragrances, Soap & Bath, Deodorants, Nail care, Feminine
For the following questions, please enter "Not sure" if you can't provide the data. Leave blank or enter "0" if you have no sales in the category

35) Please indicate your company’s TOTAL ORGANIC 2012 sales in these categories
(U.S. Dollar value in thousands)

<table>
<thead>
<tr>
<th>Category</th>
<th>Sales Value (in thousands)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beverages</td>
<td>0</td>
</tr>
<tr>
<td>Baked Goods &amp; Grains</td>
<td>0</td>
</tr>
<tr>
<td>Meat and Seafood</td>
<td>0</td>
</tr>
<tr>
<td>Fruits and Vegetables</td>
<td>0</td>
</tr>
<tr>
<td>Dairy</td>
<td>0</td>
</tr>
<tr>
<td>Snacks</td>
<td>0</td>
</tr>
<tr>
<td>Packaged/Prepared Foods</td>
<td>0</td>
</tr>
<tr>
<td>Condiments</td>
<td>0</td>
</tr>
<tr>
<td>Nutritional Supplements</td>
<td>0</td>
</tr>
<tr>
<td>Personal Care</td>
<td>0</td>
</tr>
<tr>
<td>Clothing &amp; Fibers</td>
<td>0</td>
</tr>
<tr>
<td>Household Products</td>
<td>0</td>
</tr>
<tr>
<td>Other</td>
<td>0</td>
</tr>
</tbody>
</table>

Private Label

Private Label
For the following questions, please leave blank if you can't provide the data. Please enter "0" if you have no sales in the category.

36) Please provide percentage breakdowns of your company's TOTAL ORGANIC sales in 2012. If you do not know, please leave blank or if you had none, please enter "0". Total should sum to 100.

- Contract Manufacturing
- Private Label Manufacturing
- Branded Products

37) Please indicate what percentage of your company's 2012 ORGANIC PRIVATE LABEL sales were in each product category. If you are not sure or had none, please leave blank. If you had some private label sales, total should sum to 100.

- Beverages
- Baked Goods & Grains
- Meat and Seafood
- Fruits and Vegetables
- Dairy
- Snacks
- Packaged/Prepared Foods
- Condiments
- Nutritional Supplements
- Personal Care
- Clothing & Fibers
- Household Products

38) What was your company's 2012 sales growth for Private Label products in each ORGANIC category? Please enter percent growth as a whole number (For example enter 2% as 2). If you do not participate in a category, please leave blank.

Beverages: _________________________
Baked Goods & Grains: _________________________
Meat and Seafood: _________________________
Fruits and Vegetables: _________________________
Dairy: _________________________
Snacks: _________________________
Packaged/Prepared Foods: _________________________
Condiments: _________________________
Nutritional Supplements: _________________________
Personal Care: _________________________
Clothing & Fibers: _________________________
Household Products: _________________________

39) For the TOTAL ORGANIC INDUSTRY, please estimate what percentage of each organic category's 2012 sales were Private Label products.

<table>
<thead>
<tr>
<th>Category</th>
<th>Percent of total organic industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beverages</td>
<td></td>
</tr>
<tr>
<td>Baked Goods &amp; Grains</td>
<td></td>
</tr>
<tr>
<td>Meat and Seafood</td>
<td></td>
</tr>
<tr>
<td>Fruits and Vegetables</td>
<td></td>
</tr>
<tr>
<td>Dairy</td>
<td></td>
</tr>
<tr>
<td>Snacks</td>
<td></td>
</tr>
<tr>
<td>Packaged/Prepared Foods</td>
<td></td>
</tr>
<tr>
<td>Condiments</td>
<td></td>
</tr>
<tr>
<td>Nutritional Supplements</td>
<td></td>
</tr>
<tr>
<td>Personal Care</td>
<td></td>
</tr>
<tr>
<td>Clothing &amp; Fibers</td>
<td></td>
</tr>
<tr>
<td>Household Products</td>
<td></td>
</tr>
</tbody>
</table>

40) Please indicate which organic product categories you participate in (check all that apply)*

[ ] Beverages Jump to Q42
[ ] Baked Goods & Grains Jump to Q48
Jump to the first category in which you participate

Beverages

Sales Category Details

Beverages
Fresh Juice
Refrigerated packaged juice
Frozen Juice
Shelf-stable juice
Soft drinks (soda pop, RTD tea & coffee)
Sports/Energy Drinks
Soymilk
Non-Soy Dairy Alternatives (i.e. rice, oat, nut milk)
Beer
Wine
Liquor
Tea (dry)
Coffee (dry: bulk & packaged)
Cocoa
Coffee Substitutes
41) Beverages: Do you sell organic beverages?*

( ) Yes
( ) No Jump to Q47

Beverages Part 2

Sales Category Details
Please provide the following information for each type of organic product that you sell:
1. Your company's 2012 sales, in U.S. $ thousands

For the following questions, please leave blank if you had no sales in the category. If you cannot provide the data, please enter "NA"

42) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

_____ Fresh Juice
_____ Refrigerated packaged juice
_____ Frozen Juice
_____ Shelf-stable juice
_____ Soft drinks (soda pop, RTD tea & coffee)
_____ Sports/Energy Drinks
_____ Soymilk
_____ Non-Soy Dairy Alternatives (i.e., rice, oat, nut milk)
_____ Beer
_____ Wine
_____ Liquor
_____ Tea (dry)
_____ Coffee (dry: bulk & packaged)
_____ Cocoa
43) Your company percentage sales growth in 2012

Please enter percent growth as whole numbers

Fresh Juice: _________________________
Refrigerated packaged juice: _________________________
Frozen Juice: _________________________
Shelf-stable juice: _________________________
Soft drinks (soda pop, RTD tea & coffee): _________________________
Sports/Energy Drinks: _________________________
Soymilk: _________________________
Non-Soy Dairy Alternatives (i.e., rice, oat, nut milk): _________________________
Beer: _________________________
Wine: _________________________
Liquor: _________________________
Tea (dry): _________________________
Coffee (dry: bulk & packaged): _________________________
Cocoa: _________________________
Coffee Substitutes: _________________________
Other: _________________________

44) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh Juice</td>
</tr>
<tr>
<td>Refrigerated packaged juice</td>
</tr>
<tr>
<td>Frozen Juice</td>
</tr>
<tr>
<td>Shelf-stable juice</td>
</tr>
<tr>
<td>Soft drinks (soda pop, RTD tea &amp; coffee)</td>
</tr>
<tr>
<td>Sports/Energy Drinks</td>
</tr>
<tr>
<td>Soymilk</td>
</tr>
<tr>
<td>Non-Soy Dairy Alternatives (i.e. rice, oat, nut milk)</td>
</tr>
</tbody>
</table>
### Baked Goods & Grains

**Baked Goods & Grains**
- Fresh Bread & Baked Goods (i.e. bread, rolls, cakes)
- Frozen Baked Goods (i.e. bread, bagels, waffles, cakes, pies)
- In-store Bakery
- Cookies
- Crackers/Rice Cakes
- Baking Needs (flour, mixes, yeast, etc.)
- Dry Breakfast Food/Cereal
- Grains (rice, millet, bulgar, etc.)
- Pasta
47) Baked Goods & Grains: Do you sell organic baked goods and grains?*

( ) Yes
( ) No Jump to Q53

Baked Goods Part 2

Sales Category Details
Please provide the following information for each type of organic product that you sell:
1. Your company's 2012 sales, in U.S. $ thousands

For the following questions, please leave blank if you had no sales in the category. If you cannot provide the data, please enter "NA"

48) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

______ Fresh Bread & Baked Goods (e.g., bread, rolls, cakes)
______ Frozen Baked Goods (e.g., bread, bagels, waffles, cakes, pies)
______ In-store Bakery
______ Cookies
______ Crackers/Rice Cakes
______ Baking Needs (flour, mixes, yeast, etc.)
______ Dry Breakfast Food/Cereal
______ Grains (rice, millet, bulgar, etc.)
______ Pasta
______ Other

49) Your company percentage sales growth in 2012
Please enter percent growth as whole numbers

Fresh Bread & Baked Goods (e.g., bread, rolls, cakes): _________________________
Frozen Baked Goods (e.g., bread, bagels, waffles, cakes, pies): _________________________
In-store Bakery: _________________________
Cookies: _________________________
Crackers/Rice Cakes: _________________________
Baking Needs (flour, mixes, yeast, etc.): _________________________
Dry Breakfast Food/Cereal: _________________________
Grains (rice, millet, bulgar, etc.): _________________________
Pasta: _________________________
Other: _________________________

50) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th>Category</th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh Bread &amp; Baked Goods (e.g., bread, rolls, cakes)</td>
<td>___</td>
</tr>
<tr>
<td>Frozen Baked Goods (e.g., bread, bagels, waffles, cakes, pies)</td>
<td>___</td>
</tr>
<tr>
<td>In-store Bakery</td>
<td>___</td>
</tr>
<tr>
<td>Cookies</td>
<td>___</td>
</tr>
<tr>
<td>Crackers/Rice Cakes</td>
<td>___</td>
</tr>
<tr>
<td>Baking Needs (flour, mixes, yeast, etc.)</td>
<td>___</td>
</tr>
<tr>
<td>Dry Breakfast Food/Cereal</td>
<td>___</td>
</tr>
<tr>
<td>Grains (rice, millet, bulgar, etc.)</td>
<td>___</td>
</tr>
<tr>
<td>Pasta</td>
<td>___</td>
</tr>
<tr>
<td>Other</td>
<td>___</td>
</tr>
</tbody>
</table>

51) Estimated overall organic baked goods industry sales growth in...

<table>
<thead>
<tr>
<th>Year</th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>___</td>
</tr>
<tr>
<td>2013</td>
<td>___</td>
</tr>
<tr>
<td>2014</td>
<td>___</td>
</tr>
</tbody>
</table>
52) Do you feel there are any overarching issues driving the organic baked goods industry or that should be addressed?

Meat & Seafood

Sales Category Details

Meat & Seafood
Beef
Lamb
Pork
Poultry
Fish
Other animal
Canned Fish & Seafood
Canned Meats & Meat Spreads

53) Meat and Seafood: Do you sell organic meat and/or seafood?*

( ) Yes
( ) No Jump to Q59

Meat and Seafood Part 2

Sales Category Details
Please provide the following information for each type of organic product that you sell:
1. Your company's 2012 sales, in U.S. $ thousands
54) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

_____ Beef
_____ Lamb
_____ Pork
_____ Poultry
_____ Fish
_____ Canned Fish & Seafood
_____ Canned Meats & Meat Spreads
_____ Other

55) Your company percentage sales growth in 2012
Please enter percent growth as whole numbers

Beef: _________________________
Lamb: _________________________
Pork: _________________________
Poultry: _________________________
Fish: _________________________
Canned Fish & Seafood: _________________________
Canned Meats & Meat Spreads: _________________________
Other: _________________________

56) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th></th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beef</td>
<td>_____</td>
</tr>
<tr>
<td>Lamb</td>
<td>_____</td>
</tr>
<tr>
<td>Pork</td>
<td>_____</td>
</tr>
<tr>
<td>Product Category</td>
<td>Estimated Sales Growth</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Poultry</td>
<td>___</td>
</tr>
<tr>
<td>Fish</td>
<td>___</td>
</tr>
<tr>
<td>Canned Fish &amp; Seafood</td>
<td>___</td>
</tr>
<tr>
<td>Canned Meats &amp; Meat Spreads</td>
<td>___</td>
</tr>
<tr>
<td>Other</td>
<td>___</td>
</tr>
</tbody>
</table>

57) Estimated overall organic meat and seafood industry sales growth in...

<table>
<thead>
<tr>
<th>Year</th>
<th>Estimated Product Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>___</td>
</tr>
<tr>
<td>2013</td>
<td>___</td>
</tr>
<tr>
<td>2014</td>
<td>___</td>
</tr>
</tbody>
</table>

58) Do you feel there are any overarching issues driving the organic meat & seafood industry or that should be addressed?

Fruit and Vegetables

- Fruit & Vegetables
- Fresh Produce (bulk or loose)
- Packaged & Branded Fresh Produce
- Frozen Fruits & Vegetables
- Canned Fruits & Vegetables
- Dried Fruits & Vegetables
- Dried Beans

59) Fruit & Vegetables: Do you sell organic fruits & vegetables?*

( ) Yes
Fruit and Vegetables Part 2

Sales Category Details
Please provide the following information for each type of organic product that you sell:
1. Your company's 2012 sales, in U.S. $ thousands

For the following questions, please leave blank if you had no sales in the category. If you cannot provide the data, please enter "NA".

60) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

______ Fresh Produce (bulk or loose)
______ Packaged & Branded Fresh Produce
______ Frozen Fruits & Vegetables
______ Canned Fruits & Vegetables
______ Dried Fruits & Vegetables
______ Dried Beans
______ Other

61) Your company percentage sales growth in 2012
Please enter percent growth as whole numbers

Fresh Produce (bulk or loose): _________________________
Packaged & Branded Fresh Produce: _________________________
Frozen Fruits & Vegetables: _________________________
Canned Fruits & Vegetables: _________________________
Dried Fruits & Vegetables: _________________________
Dried Beans: _________________________
62) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th></th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fresh Produce (bulk or loose)</td>
<td>___</td>
</tr>
<tr>
<td>Packaged &amp; Branded Fresh Produce</td>
<td>___</td>
</tr>
<tr>
<td>Frozen Fruits &amp; Vegetables</td>
<td>___</td>
</tr>
<tr>
<td>Canned Fruits &amp; Vegetables</td>
<td>___</td>
</tr>
<tr>
<td>Dried Fruits &amp; Vegetables</td>
<td>___</td>
</tr>
<tr>
<td>Dried Beans</td>
<td>___</td>
</tr>
<tr>
<td>Other</td>
<td>___</td>
</tr>
</tbody>
</table>

63) Estimated overall organic fruit and vegetable industry sales growth in...

<table>
<thead>
<tr>
<th></th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>___</td>
</tr>
<tr>
<td>2013</td>
<td>___</td>
</tr>
<tr>
<td>2014</td>
<td>___</td>
</tr>
</tbody>
</table>

What produce categories experienced the largest growth in 2012?

Of the bulk or loose (unpackaged) produce that you sell, what are your top 3 product categories?
Of the packaged and branded produce that you sell, what are your top 3 product categories (by highest sales volume)

What surprising sales trends are you seeing in the produce category right now? (for example, newly popular products, products that aren't selling, new varieties, etc.)

64) Do you feel there are any overarching issues driving the organic fruit & vegetable industry or that should be addressed?

For 2012, OTA is conducting a deep dive into the produce segment. Would you be available for a follow-up interview on this topic?

() Yes

() No

Dairy

Dairy
Milk/Cream
Cheese
Butter
Eggs
Yogurt
Ice Cream
Sour Cream
Cottage Cheese
Canned Milk

65) Dairy: Do you sell organic dairy?*

() Yes
Dairy Part 2

Sales Category Details
Please provide the following information for each type of organic product that you sell:
1. Your company's 2012 sales, in U.S. $ thousands

For the following questions, please leave blank if you had no sales in the category. If you cannot provide the data, please enter "NA".

66) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

______Milk/Cream
______Cheese
______Butter
______Eggs
______Yogurt
______Ice Cream
______Sour Cream
______Cottage Cheese
______Canned Milk
______Other

67) Your company percentage sales growth in 2012
Please enter percent growth as whole numbers

Milk/Cream: _________________________
Cheese: ___________________________
Butter: ___________________________
Eggs: _____________________________
Yogurt: _________________________
Ice Cream: _________________________
Sour Cream: _________________________
Cottage Cheese: _________________________
Canned Milk: _________________________
Other: _________________________

68) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th></th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milk/Cream</td>
<td>___</td>
</tr>
<tr>
<td>Cheese</td>
<td>___</td>
</tr>
<tr>
<td>Butter</td>
<td>___</td>
</tr>
<tr>
<td>Eggs</td>
<td>___</td>
</tr>
<tr>
<td>Yogurt</td>
<td>___</td>
</tr>
<tr>
<td>Ice Cream</td>
<td>___</td>
</tr>
<tr>
<td>Sour Cream</td>
<td>___</td>
</tr>
<tr>
<td>Cottage Cheese</td>
<td>___</td>
</tr>
<tr>
<td>Canned Milk</td>
<td>___</td>
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<tr>
<td>Other</td>
<td>___</td>
</tr>
</tbody>
</table>

69) Estimated overall organic dairy industry sales growth in...

<table>
<thead>
<tr>
<th></th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>___</td>
</tr>
<tr>
<td>2013</td>
<td>___</td>
</tr>
<tr>
<td>2014</td>
<td>___</td>
</tr>
</tbody>
</table>

70) Do you feel there are there any overarching issues driving the organic dairy industry or that should be addressed?
Snacks

Chocolate/Candy Bars
Other Candy & Gum
Nuts (bulk & packaged)
Salty Snacks (chips, pretzels, popcorn)
Nutrition Bars

71) Snacks: Do you sell organic snacks?*

( ) Yes
( ) No Jump to Q77

Snacks Part 2

Sales Category Details
Please provide the following information for each type of organic product that you sell:
1. Your company's 2012 sales, in U.S. $ thousands

For the following questions, please leave blank if you had no sales in the category. If you cannot provide the data, please enter "NA".

72) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

_______Chocolate/Candy Bars
_______Other Candy & Gum
_______Nuts (bulk & packaged)
73) Your company percentage sales growth in 2012
Please enter percent growth as whole numbers

Chocolate/Candy Bars: _________________________
Other Candy & Gum: _________________________
Nuts (bulk & packaged): _________________________
Salty Snacks (chips, pretzels, popcorn): _________________________
Nutrition Bars: _________________________
Other: _________________________

74) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th></th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chocolate/Candy Bars</td>
<td>___</td>
</tr>
<tr>
<td>Other Candy &amp; Gum</td>
<td>___</td>
</tr>
<tr>
<td>Nuts (bulk &amp; packaged)</td>
<td>___</td>
</tr>
<tr>
<td>Salty Snacks (chips, pretzels, popcorn)</td>
<td>___</td>
</tr>
<tr>
<td>Nutrition Bars</td>
<td>___</td>
</tr>
<tr>
<td>Other</td>
<td>___</td>
</tr>
</tbody>
</table>

75) Estimated overall organic snacks industry sales growth in...

<table>
<thead>
<tr>
<th></th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>___</td>
</tr>
<tr>
<td>2013</td>
<td>___</td>
</tr>
<tr>
<td>2014</td>
<td>___</td>
</tr>
</tbody>
</table>
76) Do you feel there are any overarching issues driving the organic snack industry or that should be addressed?

Packaged/Prepared Foods

Packaged/Prepared Foods
Frozen Prepared Foods (i.e. dinners, pies, pizza, ethnic, sandwiches)
Refrigerated Prepared Foods
Canned Prepared Foods (i.e. chili, pasta, ethnic, stew)
Dried Prepared Foods (i.e. dinners, rice, stuffing, etc.)
Food Service/Deli
Baby Food (excluding formula)
Baby & Infant Formula
Meat Alternatives & Veggie Burgers
Tofu & Tempeh Products
Soup (canned, packaged, dry, broth)
Pasta Sauces
Nut Butters
Desserts (gelatin, pudding, toppings)

77) Packaged/Prepared Foods: Do you sell organic packaged/prepared foods?*

( ) Yes
( ) No Jump to Q83

Packaged/Prepared Foods Part 2

Sales Category Details
Please provide the following information for each type of organic product that
you sell:
1. Your company's 2012 sales, in U.S. $ thousands

For the following questions, please leave blank if you had no sales in the category. If you cannot provide the data, please enter "NA".

78) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

______Frozen Prepared Foods (i.e. dinners, pies, pizza, ethnic, sandwiches)
______Refrigerated Prepared Foods
______Canned Prepared Foods (i.e. chili, pasta, ethnic, stew)
______Dried Prepared Foods (i.e. dinners, rice, stuffing, etc.)
______Food Service/Deli
______Baby Food (excluding formula)
______Baby & Infant Formula
______Meat Alternatives & Veggie Burgers
______Tofu & Tempeh Products
______Soup (canned, packaged, dry, broth)
______Pasta Sauces
______Nut Butters
______Desserts (gelatin, pudding, toppings)
______Other

79) Your company percentage sales growth in 2012
Please enter percent growth as whole numbers

Frozen Prepared Foods (i.e. dinners, pies, pizza, ethnic, sandwiches):
_________________________
Refrigerated Prepared Foods: _________________________
Canned Prepared Foods (i.e. chili, pasta, ethnic, stew): _________________________
Dried Prepared Foods (i.e. dinners, rice, stuffing, etc.): _________________________
Food Service/Deli: _________________________
Baby Food (excluding formula): _________________________
Baby & Infant Formula: _________________________
Meat Alternatives & Veggie Burgers: _________________________
Tofu & Tempeh Products: _________________________
Soup (canned, packaged, dry, broth): _________________________
Pasta Sauces: _________________________
Nut Butters: _________________________
Desserts (gelatin, pudding, toppings): _________________________
Other: _________________________

80) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frozen Prepared Foods (i.e. dinners, pies, pizza, ethnic, sandwiches)</td>
<td>___</td>
</tr>
<tr>
<td>Refrigerated Prepared Foods</td>
<td>___</td>
</tr>
<tr>
<td>Canned Prepared Foods (i.e. chili, pasta, ethnic, stew)</td>
<td>___</td>
</tr>
<tr>
<td>Dried Prepared Foods (i.e. dinners, rice, stuffing, etc.)</td>
<td>___</td>
</tr>
<tr>
<td>Food Service/Deli</td>
<td>___</td>
</tr>
<tr>
<td>Baby Food (excluding formula)</td>
<td>___</td>
</tr>
<tr>
<td>Baby &amp; Infant Formula</td>
<td>___</td>
</tr>
<tr>
<td>Meat Alternatives &amp; Veggie Burgers</td>
<td>___</td>
</tr>
<tr>
<td>Tofu &amp; Tempeh Products</td>
<td>___</td>
</tr>
<tr>
<td>Soup (canned, packaged, dry, broth)</td>
<td>___</td>
</tr>
<tr>
<td>Pasta Sauces</td>
<td>___</td>
</tr>
<tr>
<td>Nut Butters</td>
<td>___</td>
</tr>
<tr>
<td>Desserts (gelatin, pudding, toppings)</td>
<td>___</td>
</tr>
<tr>
<td>Other</td>
<td>___</td>
</tr>
</tbody>
</table>

81) Estimated overall organic packaged/prepared foods industry sales growth in...

<table>
<thead>
<tr>
<th>Year</th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>___</td>
</tr>
<tr>
<td>2013</td>
<td>___</td>
</tr>
<tr>
<td>2014</td>
<td>___</td>
</tr>
</tbody>
</table>
82) Do you feel there are any overarching issues driving the organic packaged/prepared foods industry or that should be addressed?

---

**Condiments**

Condiments:
- Salad Dressings
- Salsa
- Dips
- Jams & Preserves
- Ethnic Sauces (soy, hot sauce, etc)
- Ketchup
- Other condiments (i.e. may, mustard, olives, pickles)
- Spices
- Oils, Shortening, and Cooking Sprays
- Sugar, Syrup, and Sweeteners

83) Condiments: Do you sell organic condiments?*

( ) Yes
( ) No Jump to Q89

---

**Condiments Part 2**

Sales Category Details
Please provide the following information for each type of organic product that you sell:
1. Your company's 2012 sales, in U.S. $ thousands
For the following questions, please leave blank if you had no sales in the category. If you cannot provide the data, please enter "NA".

84) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

______Salad Dressings
______Salsa
______Dips
______Jams & Preserves
______Ethnic Sauces (soy, hot sauce, etc)
______Ketchup
______Other condiments (i.e. may, mustard, olives, pickles)
______Spices
______Oils, Shortening, and Cooking Sprays
______Sugar, Syrup, and Sweeteners
______Other

85) Your company percentage sales growth in 2012
Please enter percent growth as whole numbers

Salad Dressings: _________________________
Salsa: _________________________
Dips: _________________________
Jams & Preserves: _________________________
Ethnic Sauces (soy, hot sauce, etc): _________________________
Ketchup: _________________________
Other condiments (i.e. may, mustard, olives, pickles): _________________________
Spices: _________________________
Oils, Shortening, and Cooking Sprays: _________________________
Sugar, Syrup, and Sweeteners: _________________________
Other: _________________________
86) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salad Dressings</td>
</tr>
<tr>
<td>Salsa</td>
</tr>
<tr>
<td>Dips</td>
</tr>
<tr>
<td>Jams &amp; Preserves</td>
</tr>
<tr>
<td>Ethnic Sauces (soy, hot sauce, etc)</td>
</tr>
<tr>
<td>Ketchup</td>
</tr>
<tr>
<td>Other condiments (i.e. may, mustard, olives, pickles)</td>
</tr>
<tr>
<td>Spices</td>
</tr>
<tr>
<td>Oils, Shortening, and Cooking Sprays</td>
</tr>
<tr>
<td>Sugar, Syrup, and Sweeteners</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

87) Estimated overall organic condiments industry sales growth in...

<table>
<thead>
<tr>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
</tr>
<tr>
<td>2013</td>
</tr>
<tr>
<td>2014</td>
</tr>
</tbody>
</table>

88) Do you feel there are any overarching issues driving the organic packaged/prepared foods industry or that should be addressed?

---

**Nutritional Supplements**
89) Nutritional Supplements: Do you sell organic nutritional supplements?*

( ) Yes
( ) No Jump to Q95

---

**Nutritional Supplements Part 2**

**Sales Category Details**
Please provide the following information for each type of organic product that you sell:
1. Your company's 2012 sales, in U.S. $ thousands

*For the following questions, please leave blank if you had no sales in the category. If you cannot provide the data, please enter "NA"*

90) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

______Vitamins
______Minerals
______Herbs & Botanicals
______Sports Nutrition
______Meal Replacement
______Specialty & Homeopathic
______Other
91) Your company percentage sales growth in 2012
*Please enter percent growth as whole numbers*

Vitamins: _________________________
Minerals: _________________________
Herbs & Botanicals: _________________________
Sports Nutrition: _________________________
Meal Replacement: _________________________
Specialty & Homeopathic: _________________________
Other: _________________________

92) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th></th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vitamins</td>
<td>___</td>
</tr>
<tr>
<td>Minerals</td>
<td>___</td>
</tr>
<tr>
<td>Herbs &amp; Botanicals</td>
<td>___</td>
</tr>
<tr>
<td>Sports Nutrition</td>
<td>___</td>
</tr>
<tr>
<td>Meal Replacement</td>
<td>___</td>
</tr>
<tr>
<td>Specialty &amp; Homeopathic</td>
<td>___</td>
</tr>
<tr>
<td>Other</td>
<td>___</td>
</tr>
</tbody>
</table>

93) Estimated overall organic nutritional supplement industry sales growth in...

<table>
<thead>
<tr>
<th></th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>___</td>
</tr>
<tr>
<td>2013</td>
<td>___</td>
</tr>
<tr>
<td>2014</td>
<td>___</td>
</tr>
</tbody>
</table>

94) Do you feel there are any overarching issues driving the organic nutritional supplements industry or that should be addressed?
Personal Care

Personal Care:
Hair Care (shampoo, conditioner, colors, gel)
Skin Care (non-cosmetic lotions, cleansers, etc.)
Cosmetics (facial, colors, lipstick)
Oral Care (toothpaste, mouthwash, floss, brushes)
Aromatherapy/Fragrances
Soap & Bath
Deodorants
Nail care
Feminine hygiene
Shaving products
Tissues, Swabs, & Wipes
Baby Care

95) Personal Care: Do you sell organic personal care products?*

( ) Yes
( ) No Jump to Q104

Personal Care Part 2

Sales Category Details
Please provide the following information for each type of organic product that you sell:
1. Your company's 2012 sales, in U.S. $ thousands

For the following questions, please leave blank if you had no sales in the category. If you cannot provide the data, please enter "NA"
96) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

______Hair Care (shampoo, conditioner, colors, gel)
______Skin Care (non-cosmetic lotions, cleansers, etc.)
______Cosmetics (facial, colors, lipstick)
______Oral Care (toothpaste, mouthwash, floss, brushes)
______Aromatherapy/Fragrances
______Soap & Bath
______Deodorants
______Nail care
______Feminine hygiene
______Shaving products
______Tissues, Swabs, & Wipes
______Baby Care
______Other

97) Your company percentage sales growth in 2012
Please enter percent growth as whole numbers

Hair Care (shampoo, conditioner, colors, gel): _________________________
Skin Care (non-cosmetic lotions, cleansers, etc.): _________________________
Cosmetics (facial, colors, lipstick): _________________________
Oral Care (toothpaste, mouthwash, floss, brushes): _________________________
Aromatherapy/Fragrances: _________________________
Soap & Bath: _________________________
Deodorants: _________________________
Nail care: _________________________
Feminine hygiene: _________________________
Shaving products: _________________________
Tissues, Swabs, & Wipes: _________________________
Baby Care: _________________________
98) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th>Estimated product growth</th>
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</thead>
<tbody>
<tr>
<td>Hair Care (shampoo, conditioner, colors, gel)</td>
</tr>
<tr>
<td>Skin Care (non-cosmetic lotions, cleansers, etc.)</td>
</tr>
<tr>
<td>Cosmetics (facial, colors, lipstick)</td>
</tr>
<tr>
<td>Oral Care (toothpaste, mouthwash, floss, brushes)</td>
</tr>
<tr>
<td>Aromatherapy/Fragrances</td>
</tr>
<tr>
<td>Soap &amp; Bath</td>
</tr>
<tr>
<td>Deodorants</td>
</tr>
<tr>
<td>Nail care</td>
</tr>
<tr>
<td>Feminine hygiene</td>
</tr>
<tr>
<td>Shaving products</td>
</tr>
<tr>
<td>Tissues, Swabs, &amp; Wipes</td>
</tr>
<tr>
<td>Baby Care</td>
</tr>
<tr>
<td>Other</td>
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</tbody>
</table>

99) Estimated overall organic personal care industry sales growth in...

<table>
<thead>
<tr>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
</tr>
<tr>
<td>2013</td>
</tr>
<tr>
<td>2014</td>
</tr>
</tbody>
</table>

100) Do you feel there are any overarching issues driving the organic personal care industry or that should be addressed?

Personal Care Part 3
101) What percentage of your organic personal care products carry the following certification?

*If you don't know, please enter "0". Total should sum to 100.*

- ____Certified to a private standard
- ____NOP certified
- ____Other certifier (please specify)
- ____Not certified

102) Do you anticipate seeking any change in your certification in the next 12 months?

<table>
<thead>
<tr>
<th>Certification</th>
<th>Start Using</th>
<th>Greatly Increase</th>
<th>Somewhat Increase</th>
<th>No Change</th>
<th>Somewhat Decrease</th>
<th>Greatly Decrease</th>
<th>Stop Using</th>
</tr>
</thead>
<tbody>
<tr>
<td>3rd party private certification</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
<td>()</td>
</tr>
<tr>
<td>NOP certification</td>
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<td>()</td>
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<tr>
<td>Other certifier</td>
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</tr>
</tbody>
</table>

103) Comments Concerning Certification:

__________________________

**Clothing & Fibers**

**Clothing & Fibers**
**Men's Clothing**
**Women's Clothing**
**Children & Teen's Clothing**
**Infant Clothing & Diapers**
Sheets & Towels
Table Linens
Mattresses & Pillows
Fabric

104) Clothing & Fibers: Do you sell organic clothing & fibers?*

( ) Yes
( ) No Jump to Q112

---

Clothing & Fibers Part 2

Sales Category Details
Please provide the following information for each type of organic product that you sell:
1. Your company's 2012 sales, in U.S. $ thousands

For the following questions, please leave blank if you had no sales in the category. If you cannot provide the data, please enter "NA"

105) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

______ Men's Clothing
______ Women's Clothing
______ Children & Teen's Clothing
______ Infant Clothing & Diapers
______ Sheets & Towels
______ Table Linens
______ Mattresses & Pillows
______ Fabric
______ Other
If other organic clothing & fiber products, please specify:
____________________________________________

106) Your company percentage sales growth in 2012
Please enter percent growth as whole numbers

Men's Clothing: _________________________
Women's Clothing: _________________________
Children & Teen's Clothing: _________________________
Infant Clothing & Diapers: _________________________
Sheets & Towels: _________________________
Table Linens: _________________________
Mattresses & Pillows: _________________________
Fabric: _________________________
Other: _________________________

107) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th>Product Category</th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men's Clothing</td>
<td>___</td>
</tr>
<tr>
<td>Women's Clothing</td>
<td>___</td>
</tr>
<tr>
<td>Children &amp; Teen's Clothing</td>
<td>___</td>
</tr>
<tr>
<td>Infant Clothing &amp; Diapers</td>
<td>___</td>
</tr>
<tr>
<td>Sheets &amp; Towels</td>
<td>___</td>
</tr>
<tr>
<td>Table Linens</td>
<td>___</td>
</tr>
<tr>
<td>Mattresses &amp; Pillows</td>
<td>___</td>
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<tr>
<td>Fabric</td>
<td>___</td>
</tr>
<tr>
<td>Other</td>
<td>___</td>
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</table>

108) Estimated overall organic clothing & fibers industry sales growth in...
<table>
<thead>
<tr>
<th></th>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>___</td>
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<tr>
<td>2013</td>
<td>___</td>
</tr>
<tr>
<td>2014</td>
<td>___</td>
</tr>
</tbody>
</table>

109) Do you feel there are any overarching issues driving the organic clothing & fibers industry or that should be addressed?

Clothing & Fibers Part 3

110) What percentage of your organic clothing & fiber products carry the following certification?

*If you don't know, please enter "0". Total should sum to 100.*

- _____ NOP certified
- _____ GOTS certified
- _____ Other certification (please specify)
- _____ Not certified

111) Do you anticipate seeking any change in your certification in the next 12 months?

<table>
<thead>
<tr>
<th></th>
<th>NOP certification</th>
<th>GOTS certification</th>
<th>Other certification</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Start Using</td>
<td>Greatly Increase</td>
<td>Somewhat Increase</td>
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</tr>
</tbody>
</table>
Household Products

Household Products
Pet Food
Flowers
Laundry
Dishwashing
Cleaning Supplies
Other Household Goods

112) Household Products: Do you sell organic household products?*

( ) Yes
( ) No Jump to Q118

Household Products Part 2

Sales Category Details
Please provide the following information for each type of organic product that you sell:
1. Your company's 2012 sales, in U.S. $ thousands

For the following questions, please leave blank if you had no sales in the category. If you cannot provide the data, please enter "NA".

113) Your company's 2012 organic sales
(U.S. Dollar value in thousands)

_______Pet Food
_______Flowers
114) Your company percentage sales growth in 2012

*Please enter percent growth as whole numbers*

Pet Food: _________________________
Flowers: _________________________
Laundry: _________________________
Dishwashing: _________________________
Cleaning Supplies: _________________________
Other: _________________________

115) Your estimated company percentage sales growth in 2013:

<table>
<thead>
<tr>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pet Food</td>
</tr>
<tr>
<td>Flowers</td>
</tr>
<tr>
<td>Laundry</td>
</tr>
<tr>
<td>Dishwashing</td>
</tr>
<tr>
<td>Cleaning Supplies</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

116) Estimated overall organic household products industry sales growth in...

<table>
<thead>
<tr>
<th>Estimated product growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
</tr>
<tr>
<td>2013</td>
</tr>
<tr>
<td>2014</td>
</tr>
</tbody>
</table>
117) Do you feel there are any overarching issues driving the organic household products industry or that should be addressed?

US Exports

Consider asking Canada questions in this section

118) Do you manufacture any products in the U.S.?*

( ) Yes
( ) No Jump to Q151

Export Market

119) Does your company currently export organic products outside the US?*

( ) Yes, we export, either directly or indirectly (through an export agent/broker/etc.)
( ) No, but we are planning to export organic products Jump to Q126
( ) No, and we are not interested in exporting organic products Jump to Q123

Direct Export

120) How are your organic products delivered for export?
Please check all that apply

[ ] Direct Export
[ ] Broker
[ ] Distributor
[ ] Other (please specify):
121) What percentage of your organic exports are delivered by these methods?  
(Total should add to 100)

_______ Direct
_______ Broker
_______ Distributor
_______ Other

122) Is export growth referenced in your strategic plan?

( ) Actively building export business
( ) Passively building export business
( ) Export business is declining

If Direct Export (Q120), Jump to Q132, else Jump to Q131

---

Not Exporting

123) Has your company ever exported organic products in the past (directly, without using an export agent or broker)?*

( ) Yes
( ) No
( ) Not sure

124) Why is your company not currently exporting organic products?
Please check all that apply

[ ] Trade barriers severely limit export opportunities
[ ] No foreign demand for my product
[ ] Regulations are too complicated
[ ] Not sure how to locate buyers
[ ] Not sure how to begin
[ ] The domestic market provides sufficient opportunities for my business
[ ] No time to develop the export market
[ ] Not sure
[ ] Other (please specify):

125) Please tell us about one area where you would most like help to begin or increase organic exporting:

Jump to Q151

Export Countries

126) Please indicate the first market to which you plan to export, the second and the third
*If planning to export to European countries besides those listed here, but not to ALL
European Union countries, please select "Other" and list countries in the comment section

<table>
<thead>
<tr>
<th>First</th>
<th>Second</th>
<th>Third</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>France</td>
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<td>European Union: all countries*</td>
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<td>Middle East</td>
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<td>Canada</td>
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<td>Region</td>
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<td>Organic Trade Association</td>
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<td>Southeast Asia</td>
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<td>South Asia (India)</td>
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<td>Australia/New Zealand</td>
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<tr>
<td>Not Sure</td>
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<tr>
<td>Other (please specify):</td>
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</tbody>
</table>

127) Are you aware of the following international business development activities?

Please check all you are aware of for the particular sponsor

<table>
<thead>
<tr>
<th>Activity</th>
<th>USDA</th>
<th>Organic Trade Association</th>
<th>State Agency</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export finance assistance</td>
<td>[]</td>
<td>[]</td>
<td>[]</td>
<td>[]</td>
</tr>
<tr>
<td>&quot;How to Export&quot; counseling session</td>
<td>[]</td>
<td>[]</td>
<td>[]</td>
<td>[]</td>
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<tr>
<td>Seminars on exporting</td>
<td>[]</td>
<td>[]</td>
<td>[]</td>
<td>[]</td>
</tr>
<tr>
<td>Participation in trade mission(s)</td>
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<tr>
<td>Meeting with foreign buyers on a trade mission in the US</td>
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<td>[]</td>
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<tr>
<td>Marketing reports, analysis, and trade data provided by USDA (FAS)</td>
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<td>[]</td>
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</tr>
<tr>
<td>Attending international trade shows</td>
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</tr>
</tbody>
</table>

128) Has your company used any of the following international business development activities?

Please check all you have used and the sponsor
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129) Please rate the usefulness of the international trade development programs provided by the USA, your state agriculture agency or the Organic Trade Association.

<table>
<thead>
<tr>
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<tr>
<td>Attending international trade shows</td>
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</tr>
</tbody>
</table>

130) Please tell us about one area where you would most like help to begin or increase organic exporting:

Jump to Q151
Exporting Indirectly

131) Has your company ever exported organic products directly in the past (without using an export agent or broker)? *

( ) Yes
( ) No
( ) Not sure

Export Biz Develop

132) Are you aware of the following international business development activities?

Please check all you are aware of for the particular sponsor

<table>
<thead>
<tr>
<th>Activity</th>
<th>USDA</th>
<th>Organic Trade Association</th>
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<td>Participation in trade mission(s)</td>
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<td>Meeting with foreign buyers on a trade mission in the US</td>
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<td>Marketing reports, analysis, and trade data provided by USDA (FAS)</td>
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<tr>
<td>Technical Assistance for Organic Barriers to Trade</td>
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</tbody>
</table>
Attending international trade shows

Export Biz 2

135) For how many years has your company been exporting organic products?

( ) Less than 1 year
( ) 1 to 2 years
( ) 3 to 5 years
( ) 6 to 10 years
( ) 11 to 20 years
( ) More than 20 years
( ) Not sure

136) What percentage of your 2012 ORGANIC sales were exports (includes sales to US export agents/brokers)?

( ) 0%
( ) >0% to 5%
( ) >5% to 10%
( ) >10% to 25%
( ) >25% to 50%
( ) More than 50%
( ) Not sure

137) What percentage of your TOTAL 2012 sales were exports (includes sales to US export agents/brokers)?

( ) 0%
( ) >0% to 5%
( ) >5% to 10%
138) What was your 2012 ORGANIC export sales volume (include sales to US export agents/brokers)

() Under $100 thousand
() $100 thousand to
() $500 thousand to
() $1 million to
() $5 million or more
() Not sure

139) What was your 2012 TOTAL export sales volume (include sales to US export agents/brokers)

() Under $100 thousand
() $100 thousand to
() $500 thousand to
() $1 million to
() $5 million or more
() Not sure

Export Biz 2b

140) Please indicate your company's TOTAL 2012 ORGANIC EXPORT sales in these categories
(U.S. Dollar value in thousands)

_______ Beverages
Baked Goods & Grains
Meat and Seafood
Fruits and Vegetables
Dairy
Snacks
Packaged/Prepared Foods
Condiments
Personal Care
Clothing & Fibers
Household Products
Nutritional Supplements
Organic Seeds
Other

141) What do your forecast your export sales will be in 2013?
Please enter in U.S. $ Thousands

142) For each of the following regions, approximately what was the value of organic products you exported in 2012?

<table>
<thead>
<tr>
<th>Region</th>
<th>$0</th>
<th>Under $100 thousand</th>
<th>$100 thousand to $500 thousand</th>
<th>$500 thousand to $1 million</th>
<th>$1 million to $5 million</th>
<th>$5 million or more</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>US export agents or brokers</td>
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<td>Benelux (Belgium, Netherlands, Luxembourg)</td>
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<td>Caribbean</td>
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143) To which regions do you anticipate expanding your organic exports in the next 2-3 years? Please check all that apply

[ ] US export agents or brokers
[ ] Benelux (Belgium, Netherlands, Luxembourg)
[ ] France
[ ] Germany
[ ] United Kingdom
[ ] Spain
[ ] Italy
Export Biz 4

144) What are the challenges to expanding your organic exports programs? Please check all that apply

[ ] Phytosanitary and food safety issues
[ ] Inability to modify products to international specifications
[ ] Inability to adapt labels or packaging to international specifications
[ ] Lack of sufficient knowledge of how to export and develop exports
[ ] High tariffs
[ ] Lack of knowledge of individual markets
[ ] Inability to locate appropriate buyers/distributors/importers
[ ] High cost of developing markets
145) Please check all the effective ways you've found to locate foreign buyers for your organic products.
Please check all that apply

[ ] Responding to advertisements in US trade magazines
[ ] Advertising in foreign trade magazines
[ ] Advertising in US trade magazines
[ ] Hosting foreign buyers at my plant
[ ] Meeting foreign buyers at US trade shows (reverse buyer missions)
[ ] Following up on trade leads obtained through US embassies in other countries
[ ] Referrals from my business associates
[ ] Attending trade shows in the US
[ ] Attending international trade shows
[ ] Online directories
[ ] OTA's Export Directory Online
[ ] Through the Web
[ ] Technical Assistance from OTA/FAS
[ ] Other (please specify):

Most Effective

146) Please indicate which ONE of the helpful ways you've found to locate foreign buyers for your organic products is the MOST effective way to meet foreign buyers.
Trade Shows

147) Does your company exhibit at trade shows to promote export sales?*

( ) Yes
( ) No Jump to Q149

Trade Show Participant

148) Where does your company exhibit at trade shows to promote export sales?

( ) Inside the US
( ) Outside the US
( ) Both inside and outside the US

Trade Show Attendance

149) What trade shows do you usually attend in order to develop and/or maintain international contacts?

Please check all that apply

[ ] Do not attend trade shows
[ ] CHFA (Canadian Health Food Association) - Canada
[ ] Wellnes Show - Canada
[ ] CRFA Show - Canada
[ ] SIAL Canada - Canada
[ ] FMI (Food Marketing Institute) - US
[ ] American Food Fair (National Restaurant Association) - US
IFIC Americas Food & Beverages - US
Fancy Food Show - US
Snack Expo (SNAXPO) - US
IFT (Institute of Food Technologists)-US
MAGIC Marketplace - US
NRA (National Restaurant Association) - US
NNFA Marketplace - US
PMA (Product Marketing Association) - US
Natural Products (ExpoEast)/ All Things Organic - US
Natural Products (ExpoWest) - US
ANTAD - Mexico
Alimentaria Mexico - Mexico
Abastur - Mexico
EXP HOTEL - Mexico
Food Ingredients (FI S. America) - Brazil
SIAL Mercosur - Argentina
FOODEX - Japan
IFIA International Food Ingredients & Additives Exhibition - Japan
BioFach - Japan
Supermarket Trade Show - Japan
AAHAR - India
International Food & Drink Expo - India
Food & Hotel Asia - Singapore
SIAL China - China
Food & Hotel China - China
Food Ingredients China - China
Seoul Food & Hotel Korea - S. Korea
Food Taipei - Taiwan
WOFEX World Food Expo - Philippines
Asia Fruit Logistica - Hong Kong
Hong Kong International Wine Fair - Hong Kong
HOFEX - Hong Kong
FI Food Ingredients Asia - Indonesia
[ ] Food & Hotel Indonesia - Indonesia
[ ] VIV Asia - Thailand
[ ] FI Asia Food Ingredients Asia - Thailand
[ ] Food & Hotel Vietnam - Vietnam
[ ] Fine Food Australia - Australia
[ ] ANUGA - Germany
[ ] BioFach - Germany
[ ] Fruit Logistica - Germany
[ ] Alimentaria Barcelona - Spain
[ ] HI Health Ingredients Europe - Spain
[ ] European Seafood Exposition - Belgium
[ ] World Food Moscow - Russia
[ ] Natural and Organic Products - UK
[ ] IFE International Food & Drink Exhibition London - UK
[ ] SANA - Italy
[ ] SIAL - France
[ ] Sirha - France
[ ] Food Ingredients Europe - France
[ ] Gulfood - UAE
[ ] Food Ingredients Africa - S. Africa
[ ] Morocco (American Cafe) - Morocco
[ ] Other (please specify):

150) How many export assistance programs have you participated in over the last 3 years?
Export assistance programs include foreign buyers missions, trade missions, the Export Directory Online,
exporter seminars, or any export related activities hosted by OTA or the USDA

( ) 1
( ) 2
( ) 3
( ) 4
( ) 5
( ) 6
( ) 7 or more
( ) None, though I am aware of these programs
( ) None, I am unaware of these programs

Industry Open-ended

151) Do you have any other comments about the state of the Organic Industry in general?

152) Do you have any other comments regarding public or consumer education and awareness?

Thank You!

Thank you for taking the time to participate in our survey.

If you completed the survey in full and provided your e-mail address, we will be sending you a copy of the Executive Summary of our findings by June 1, 2013.

Thank you,

James Johnson
Market Intelligence Analyst
Nutrition Business Journal
jjohnson@nutritionbusiness.com
(303) 998-9336

Angela Jagiello
Associate Director, Conference and Product Development
Organic Trade Association