



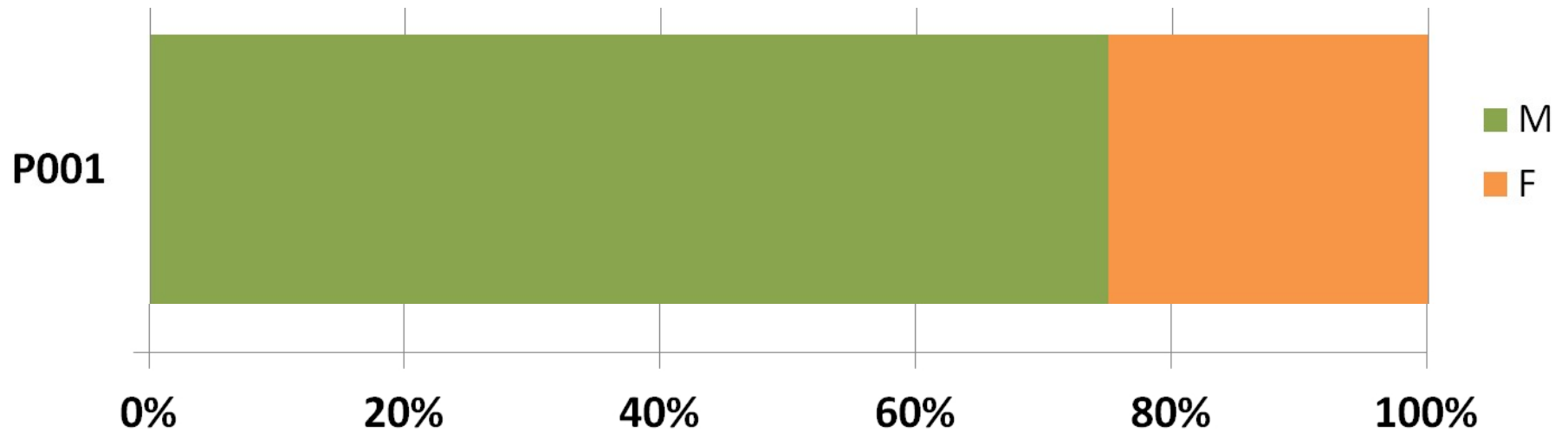
Questionnaire for stakeholders representing organic sector

German situation (2015 May)



I.2 What is your gender?

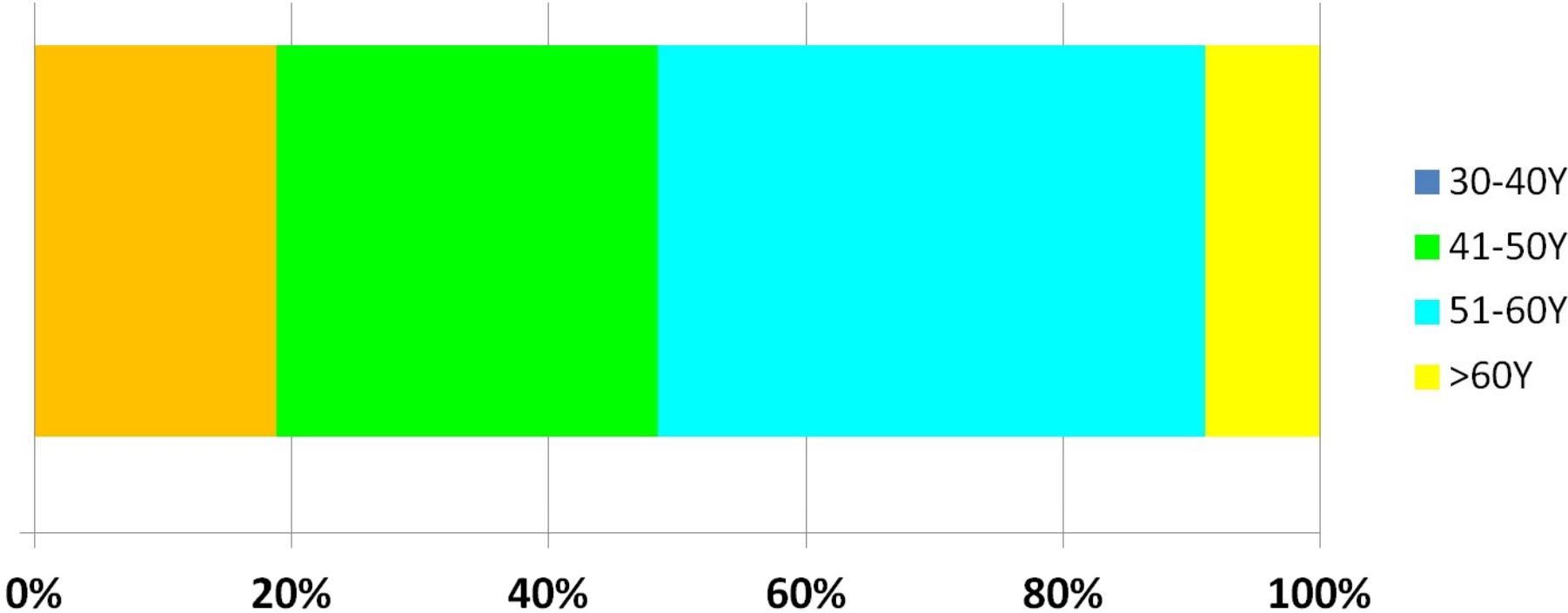
>> (single choice, mandatory)



I.3 What is your age?

>> (single choice, mandatory)

P002



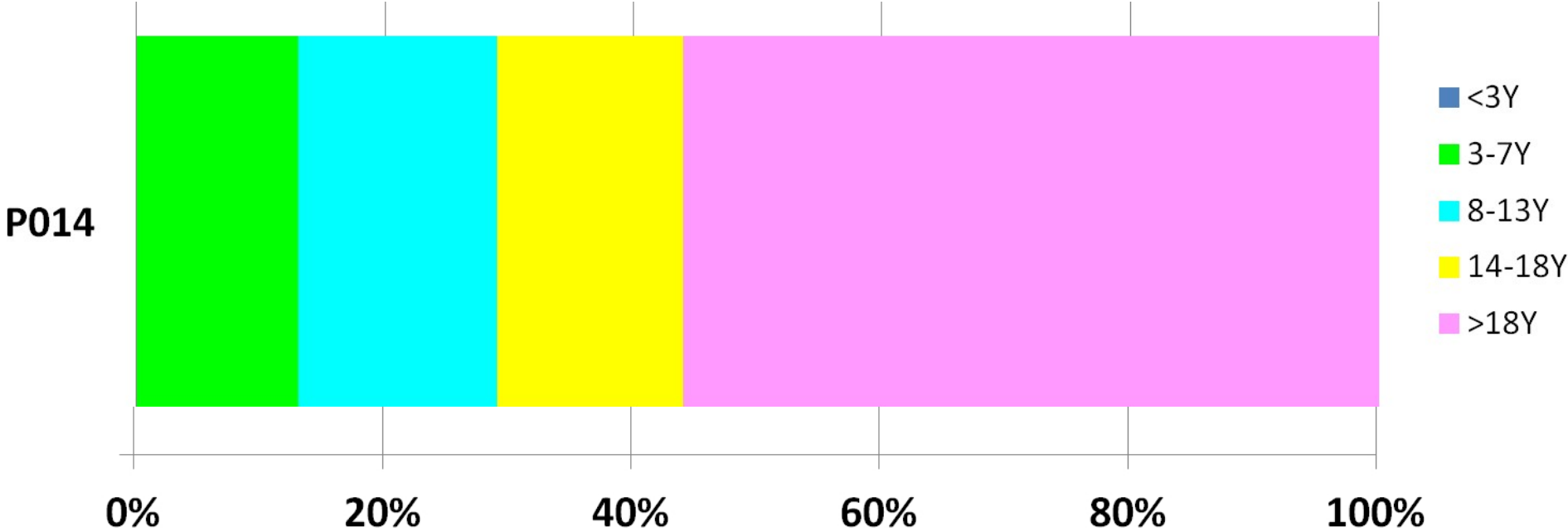
II.1 What type of enterprise / institution do you represent?

Business type	N	%
Farm	40	33
Processing	23	19
Retail sale	13	11
Wholesale	8	7
Import/Export	6	5
Supplier	1	1
Consultancy	7	6
Certifier	9	7
Public sector	8	6
Education	7	6
Sum	122	100

Enterprise	N	Farm	Proc
1	54	28	13
2	15	12	6
3	10		
4	2		
Sum	81		

II.2 How long have you been working in organic sector?

>> (single choice, mandatory)



Number of employees

Business typ	Number		Maximum		Average	
	all	agr	all	agr	all	agr
Farm	28	28	65	21	10,2	3,0
Processor	11	11	18	6	6,4	1,4
Retail sale	5	5	54	0	14,6	0,0
Wholesale	3	3	6	3	3,3	1,7
Supplier	4	4	8	6	4,3	1,8
Consultancy	2	2	11	7	5,5	3,5
Certifier	7	7	70	65	23,6	19,3
Public sector	5	5	85	7	20,2	2,2
Education	4	4	8	95	4,3	27,0
Farm + Proc	11	11	140	14	20,7	3,2
Farm + Sale	1	1	13	3	13,0	3,0
	81	81	140	95	12,2	5,1

Number of employees

Business typ	Number		Maximum		Average	
	all	agr	all	agr	all	agr
Farm	28	28	65	21	10,2	3,0
Processor	11	11	18	6	6,4	1,4
Retail sale	5	5	54	0	14,6	0,0
Wholesale	3	3	6	3	3,3	1,7
Supplier	4	4	8	6	4,3	1,8
Consultancy	2	2	11	7	5,5	3,5
Certifier	7	7	70	65	23,6	19,3
Public sector	5	5	85	7	20,2	2,2
Education	4	4	8	95	4,3	27,0
Farm + Proc	11	11	140	14	20,7	3,2
Farm + Sale	1	1	13	3	13,0	3,0
	81	81	140	95	12,2	5,1

Educational background of employees

Business typ	agr	PS	VS	HS	Col	Uni
	ave N	%	%	%	%	%
Farm	3,0	14	18	38	17	13
Processor	1,4	0	7	7	45	42
Retail sale	0,0					
Wholesale	1,7	0	0	0	17	83
Supplier	1,8	0	17	0	17	67
Consultancy	3,5	0	0	0	29	71
Certifier	19,3	0	0	0	16	84
Public sector	2,2	0	0	0	25	75
Education	27,0	7	7	5	37	44
Farm + Proc	3,2	5	27	7	26	35
Farm + Sale	3,0	100	0	0	0	0
	5,1	9	13	18	22	37

PS = Primary school, VS = Vocational school, HS = High School, Col = College, Uni = University

II.2 What is your farm profile?

	N	%
Plant production	30	75
Farm shop	28	70
Processing	16	40
Animal production	15	38
Agrotourism	6	15
Farm gastronomy	2	5
All Interviewies	40	

II.2 What is your farm profile?

	F	P	R	All	F	P	R	All
	Number				Share			
Organic shop	4	1	2	7	10	9	40	13
Supermarket	1	1	1	3	3	9	20	5
Market / bazaar	1	0	1	2	3		20	4
Online shop	2	1	2	5	5	9	40	9
All interviewies	40	11	5	56				

F = Farmer, P =Processor, R = Retailer

II.2 How long have you been working in organic sector?

Products	Number					Share				
	F	P	R	W	All	F	P	R	W	All
Bread & cereal products	6	1	5	1	13	15	9	100	33	16
Meat & meat products	7	0	5	1	13	18		100	33	16
Tea & coffee	3	4	5	1	13	8	36	100	33	16
Milk & dairy products	5	1	5	1	12	13	9	100	33	15
Fruits & vegetables	5	1	5	1	12	13	9	100	33	15
Honey	3	1	5	1	10	8	9	100	33	12
Alcoholic beverages	5	0	5	0	10	13		100		12
Oil	3	2	3	1	9	8	18	60	33	11
Sweets	4	2	3	0	9	10	18	60		11
Pulses	4	1	3	1	9	10	9	60	33	11
Juices & water	3	0	5	0	8	8		100		10
Grains	3	1	3	0	7	8	9	60		9
Baby food	3	1	3	0	7	8	9	60		9
Ready meals	4	0	3	0	7	10		60		9
Cosmetics	2	0	3	0	5	5		60		6
All Interviewees	40	11	5	3	59					

F = Farmer, P = Processor, R = Retailer, W = Wholesaler

>>> for certifier

II.7 How many farms / enterprises do you certify per year?

	Farm	Proc	Imp/Exp	Gast	Other
Min	1100	450	50	10	10
Median	1500	800	150	210	135
Mean	3000	1263	150	308	170
Max	9000	3000	250	800	400

P064 - P068

Farm = Farm enterprise (primary production),
Proc = Processor (secondary production),
Imp/Exp = Import / Export (trade)
Gast = Gastronomy
Other

>>> for import / export

II.6 Countries of origin / destination

IMPORT >>> origin

8 Romania, Bulgaria, Kosovo,
Croatia, Hungary, Austria,
Egypt, Turkey

27 EU

1 Ethiopia

90 no data

1 Japan

3 Irland, Ecuador, Italy

EXPORT >>> destination

4 Switzerland, France, UK, USA

27 EU

1 Italy

27 EU

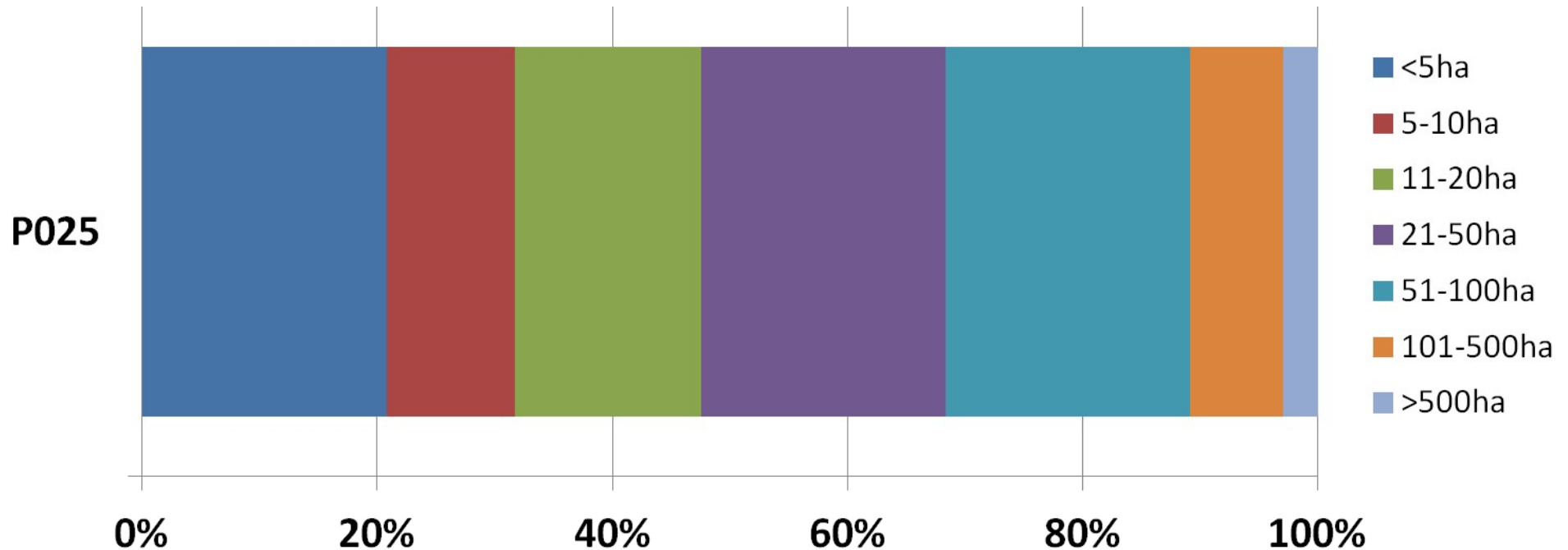
31 EU, Switzerland, Norwegia,
Singapor, Canada

2 Austria, Greece

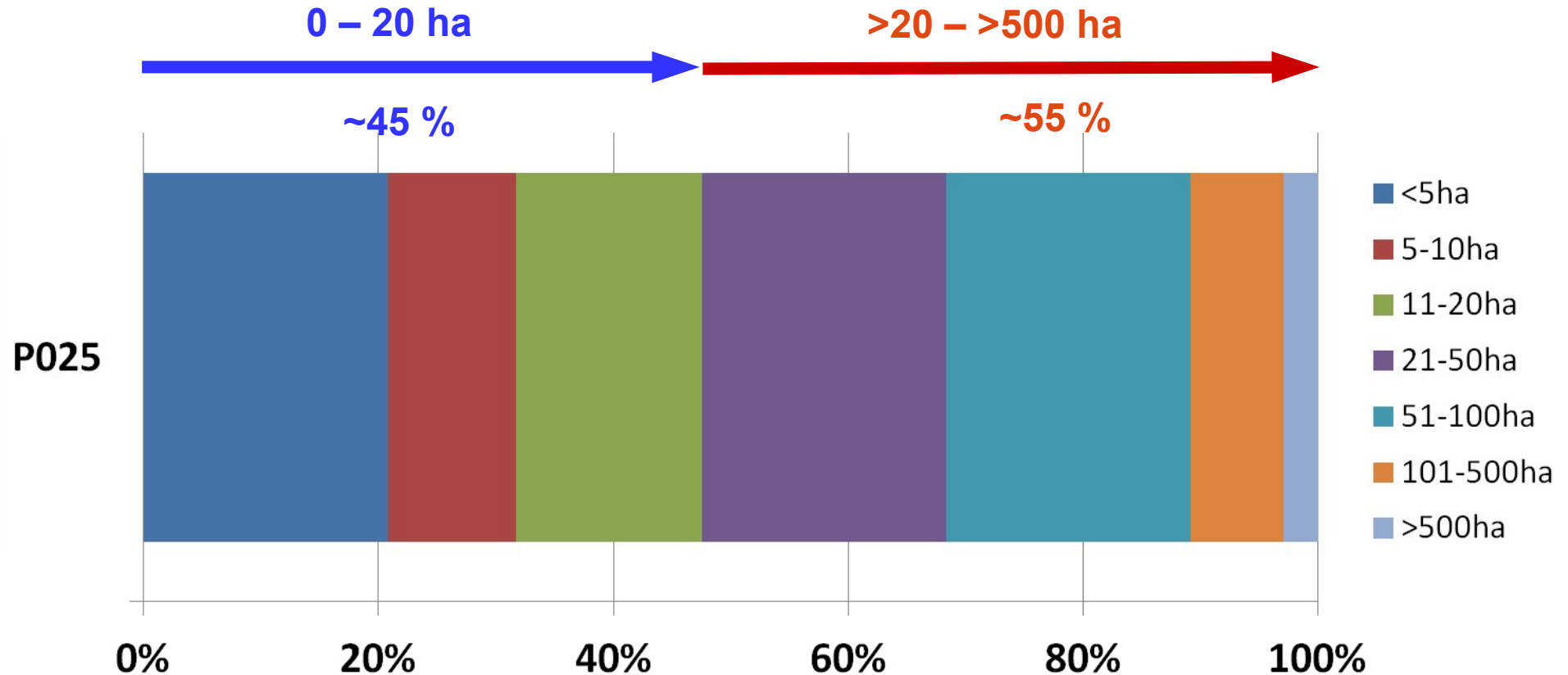
II.4 Please specify the profile and scale of your enterprise:

II.4.1 Farm size

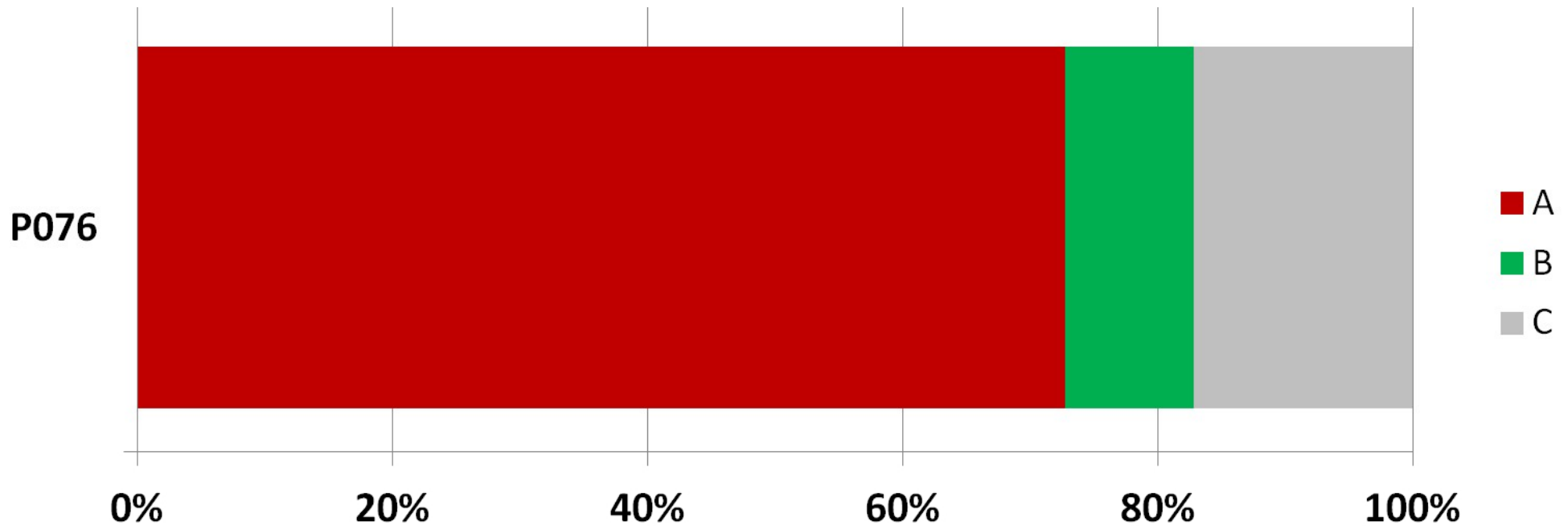
>> (single choice, mandatory)



II.4 Please specify the profile and scale of your enterprise: II.4.1 Farm size



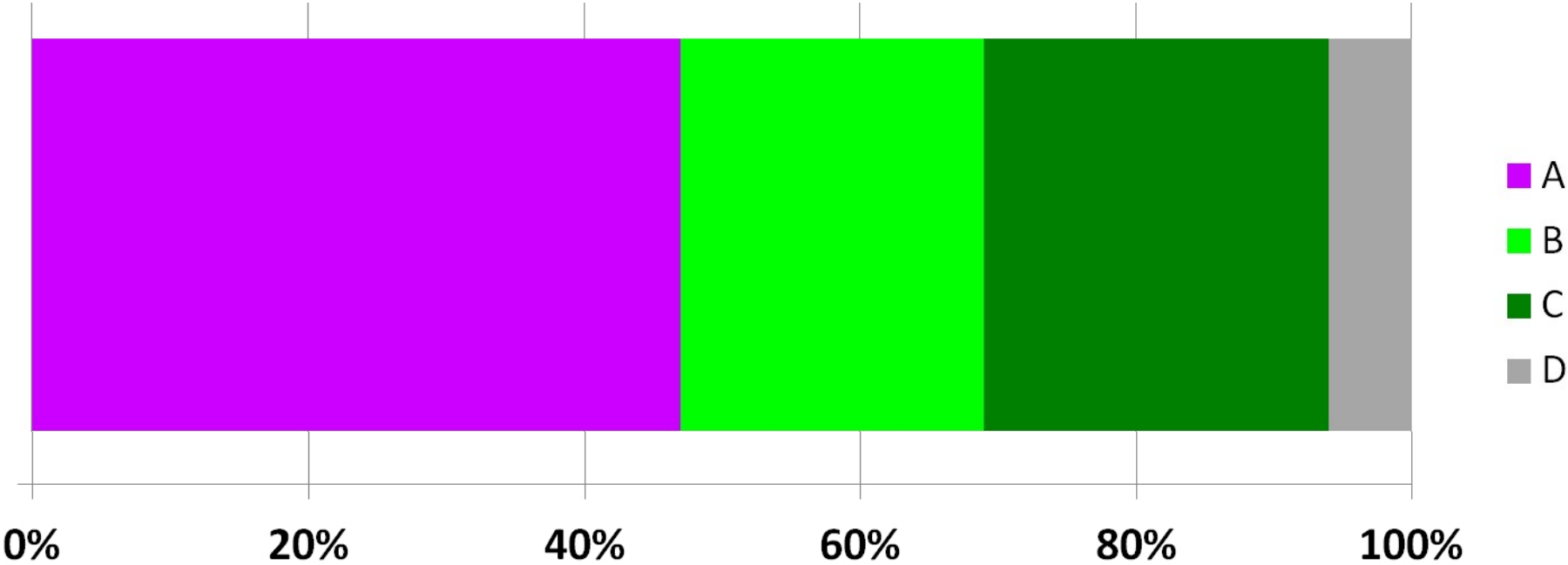
III.1 Would you like to employ a graduate educated in the topic of organic food and farming in your enterprise/institution?



A = Yes, B = No, C = I don't know

III.2 Are you planning to employ such graduates?

P078



A = No, B = Yes, within the next year, C = Yes, within the next three years, D = I don't know

Recruitment – other

N Other methods

5 Applications

2 Advertisement (Shop, radio)

1 Trainee programme organic farming

1 Labour office

III.3 Which graduate would you employ?

P079 High school

P080 Vocational school

P081 Polytech / College

P082 With a bachelor

P083 With a master

P084 With a doctorate

III.3 Which graduate would you employ?

Polytech / College

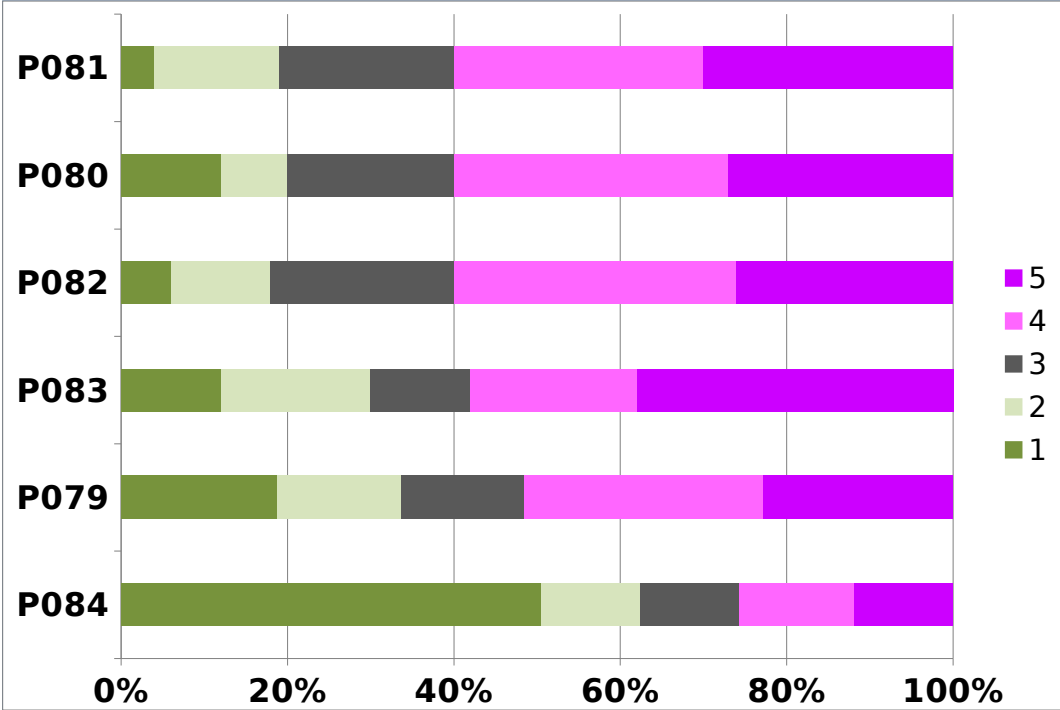
Vocational school

With a bachelor

With a master

High school

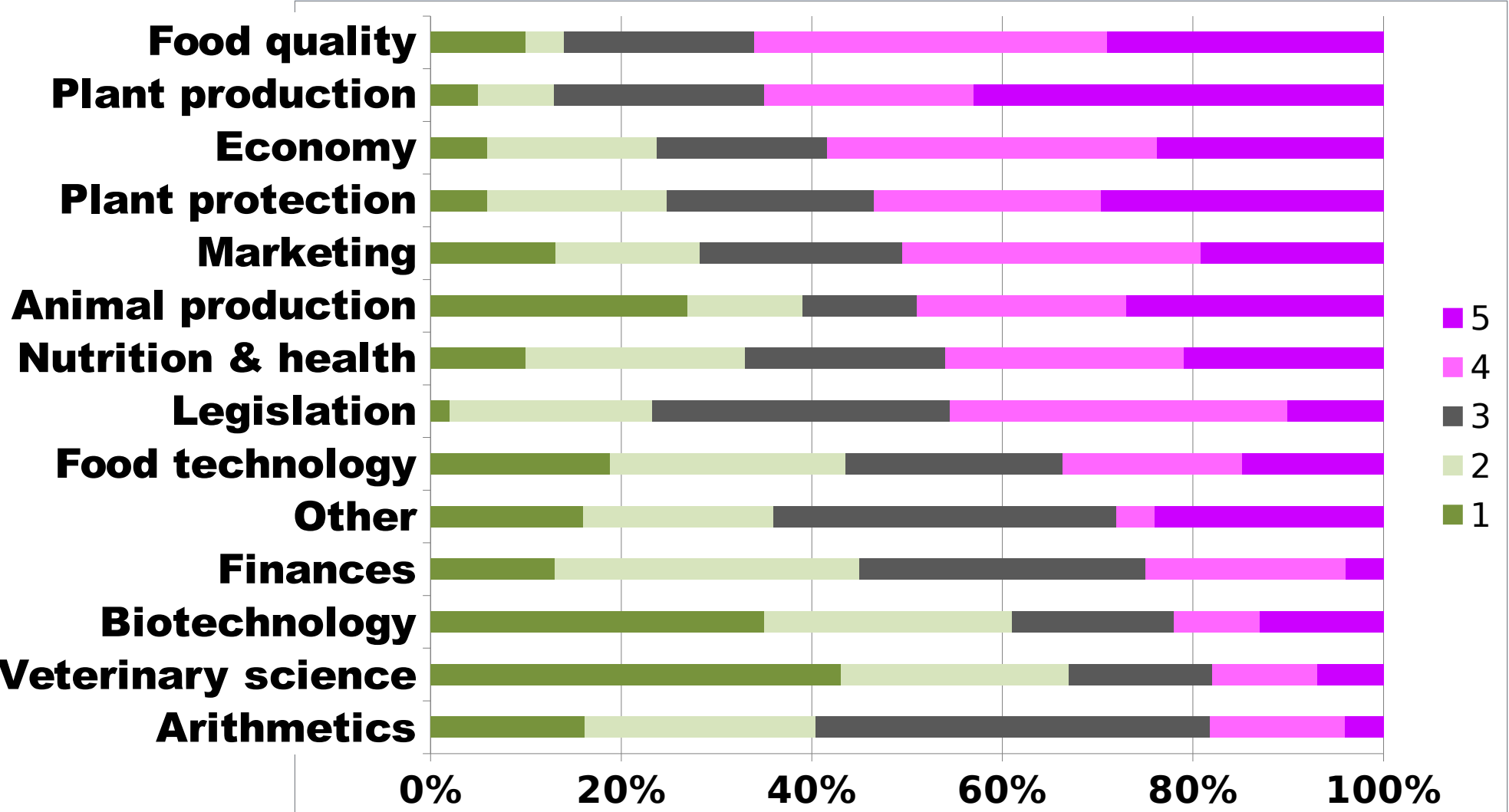
With a doctorate



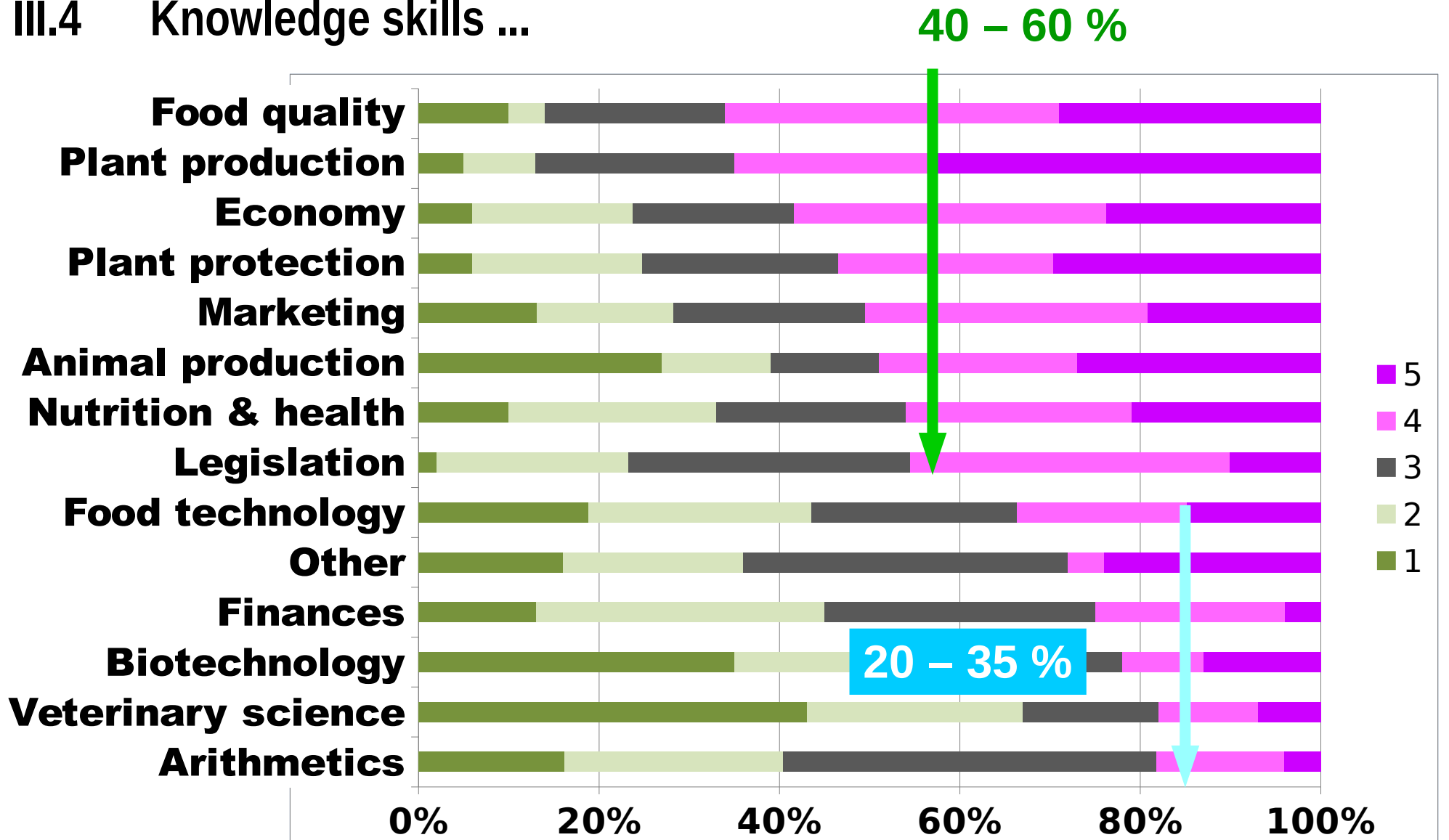
III.4 What kind of theoretical knowledge in the field of organic food and farming do you expect from graduates?

- P085 Plant production**
- P086 Plant protection**
- P087 Animal production**
- P088 Veterinary science**
- P089 Food quality**
- P090 Food technology**
- P091 Biotechnology**
- P092 Nutrition & health**
- P093 Marketing**
- P094 Legislation**
- P095 Economy**
- P096 Finances**
- P097 Arithmetics**
- P098 Other**

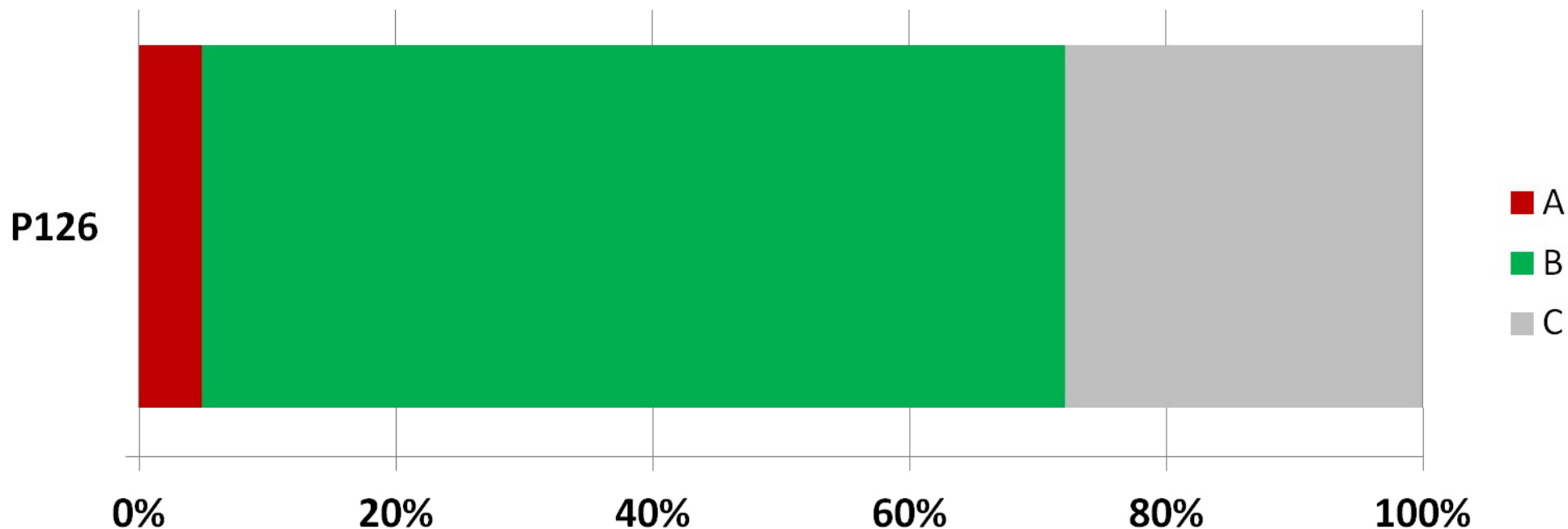
III.4 Knowledge skills ...



III.4 Knowledge skills ...



III.8 Are traditional teaching methods sufficient to prepare graduates to work in the organic sector?



A = Yes, B = No, C = I don't know

Comments

- ▶ Generalisation not possible, depends upon the concrete situation and the concrete applyer
- ▶ Practice of 2 to 3 years
- ▶ Practical production experiences
- ▶ Technical understanding
- ▶ Working horses
- ▶ Plant breeding
- ▶ Knowledges in marketing, leadership and project management
- ▶ Good educational background, interest for politics
- ▶ Capacity for teamwork and fair handling of staff members
- ▶ So-called human qualities, i.e. vitality, open-mindedness, friendliness, flexibility
- ▶ Social capacities, thinking in networks
- ▶ Keen sense for complete operative focussing
- ▶ Sociology, Philosophy

Knowlegde – comments

15 answers = 19 %

P099

(%) Content

43 more practice

29 unable to reply

10 exact profile

10 specific demand

5 'Holistic view'

5 'University graduation'

Satisfaction – comments

21 answers = 25 %

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Citations

- *The thinking in systems should be better developed*
- *University graduation = basis for potential life experiences in later life*
- *Practical issues as part of university programmes has been decreased too much.*
- *Knowledges in production techniques are okay, knowledges in juridical issues are missing.*
- *Not enough knowledges in IT and economic questions, undergraduates too often over-estimate their real level of competence*

Answers

- Actually we have a master student as apprentice for 3 months
- I am not sure if students could learn enough in our company.
But a chance should be given.
- Eventually
- If practical knowledges do exist
- Only, if apprentices stay longer than 6 months
- More yes&no, dependent upon the personality who is asking
- If students really want to enter the real practice
- But more in our cooperative in which processing&sale of products of all members occurs. Language skills are essential
- Unfortunately no conditons to coach apprentices from master programmes
- Reason for rejection: introduction of minimum wages
- Too theoretical, length of study too long
- Only if (a) the duration of the apprenticeship is longer than 3 months, (b) a final report is combined with presentation, (c) apprentices have to show self-initiativeness and interests for the business
- no continuous working hours
- presently not possible
- not relevant
- If it suits

III.10 Would you be interested in having/hosting **master students** for **short term internships** in your farm / enterprise / institution?

20 answers = 25 %

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Cultivation, harvest, packaging, marketing, personal management
Daily routine work and marketing
Distribution of products, plant production
Everything is important
Knowledge in plant production
Leadership for field vegetable production, contribution at machine work
Maintenance of buildings
Manual work in horticulture
Marketing
Marketing & Sale
Marketing, trials in plant protection of vine
Optimisation of the farm with regard to personal management, processing, marketing,
Routine work, taking care of machines
Seasonal work in the vineyard, direct marketing
Serious growth, good development in all fields
Take care of animals, crop husbandry
To guide workers and to manage crops independently
To understand German, technical knowledges
Acquisition of greige
All areas are important in a small business: strategies for the future, marketing, further
Certification in one quality satandard (IFS or ISO), acquisition of customers
Control of origin, certifications, flow of produces, purchases, marketing
Daily work, order processing, quality control
Innovation
Koordination von Ein- und Verkauf, Übersicht behalten über sehr viele einzelne Vorgänge
New QM system, common transactions, dispo
Customer service, development of trading business
To improve processes, communication
Coaching of suppliers and customers, acquisition of customers, planning of cultivation a
Development of eco label, marketing, import, communication with manufactureres, im
Customer service, orders, management of applicants
daily new ones
innovative offers for extension; economic advice for organic farms; networking with othe
Acquisition of clients, development of new, client-oriented products for advice, develop
Control and certification of organic farms, processors and importers
Assessment of pesticide residues, risk analysis
Control and certification
The normal stew
FOLLOW-UP
Cooperation at research topics and in assistance of project work
Regulations, frame conditions, political work
Improving organic farming systems
Research
Teaching, research, project management
TIME SCARCITY
Certification of standards for food processing
Contact organic processors, good knowledge of organic products and there advantage a
From hoeing to farm management
Innovations in production, personal management
Milk production, marketing, direct marketing
Outdoor production
Practical work of farmer, farm planning, farm development
Actual hotspots: IT technique, management of working processes

IV.1 What are the most important problems to be solved in your unit?

53 answers = 65 %

P134

IV.1 What are the **most important problems** to be solved in your unit?

53 answers = 65 %

P134

Problems with regard to ...

- >>>> Crop husbandry
- >>> Marketing
- >> Certification
- >> Economics
- >> Personal management
-
- > Time scarcity
- > Follow-up problems

Answers

- more yes&no
- Not in the company, in research and extension
- Not really. Scientists in agronomy are too often not free of practical constraints
- If they are able to understand problems of the practice
- Partly
- Dependent on the management concept. There is no need for business consultancy
- That happens seldom.
- There must be clear definitions and realistic topics and open communication between both sites.
- Work packages within a bigger project, i.e. senior laying hens,
- composting systems, soil fertility
- Solutions not expected, but knowledges.
- Yes, in special concrete cases.
- Scientists are not that essential for our work, but potentially cooperation with them can improve our business
- Make it possible to control animal welfare issues
- Cooperation could be fruitful for the innovative concepts/ideas.
- Quality control, identification of residue sources, substitutes of peat for cultivation of mushrooms
- Packaging technology

V.2 Do you think that **researchers** could help you to solve current problems of your unit?

20 answers = 25 %

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