Organic Data Initiative Gap Analysis – California

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Executive Summary

The United States Department of Agriculture's (USDA's) Agricultural Marketing Service (AMS) Market News provides free and unbiased data on prices and volumes of over 1,000 agricultural commodities throughout the United States (USDA Agricultural Marketing Service, 2023a). These data help farmers and other agrifood industry actors make important business planning decisions. Over the past several decades, organic agriculture, focused on cycling resources, conserving biodiversity, and preserving ecological balance (USDA Agricultural Marketing Service, 2024), has emerged as an important and growing subsector of global agriculture (Reganold & Wachter, 2016). The consistent price premiums of organic agricultural products are often a major factor that draws farmers to transition to organic production (Guthman, 2004; Reganold & Wachter, 2016; Schahczenski & Post, 2019). However, as of 2023, AMS Market News included information on organically produced versions of just 200 commodities, far fewer than the 1,000+ conventionally produced commodities included (USDA Agricultural Marketing Service, 2023a).

In partnership with USDA's Agricultural Marketing Service (AMS), this study explores the price and volume data needs of stakeholders in California's organic agrifood industry. We present findings on what stakeholders already know about the organic price and volume data that are currently available, what other data they need, and how this information is used in their pricing decisions. We also provide specific recommendations that address how AMS Market News organic data offerings and accessibility could be improved to meet unmet data needs and how AMS Market News might provide additional organic data currently available only through other sources.

We used a mixed-methods research design to capture both a nuanced and broad-spectrum understanding of the data needs within California's organic agrifood industry. We conducted 26 interviews and collected 227 survey responses from stakeholders. We interviewed ten producers, six distributors and wholesalers, five processors, and five retailers. Producers made up the largest portion of our survey responses (152 responses), and we have survey responses from 27 distributors, 34 processors, and 14 retailers. Most producers and distributors/wholesalers who participated in our research had small to mid-sized operations focused on specialty crops, especially vegetables, fruit, and/or nuts. The processors and retailers we heard from were also mostly small or mid-sized and worked with a diverse set of organic agriculture products. Overall, about half of our research participants also represented businesses that were majority-owned by people from historically marginalized groups.

Our analysis of survey and interview data demonstrates key findings about organic market information use and needs within California's organic agrifood industry. The use of informal market information, like that collected through conversations with industry contacts and individual observations in the marketplace, is widespread among stakeholders in California's

organic agrifood supply chain. Direct use of organic data from AMS Market News and other more formal organic price and volume data sources was less common. We also found specific areas where AMS Market News organic data may be falling short for our research participants: data accuracy and consistency, products and geographies covered by the data, and data presentation and dissemination. Further, organic price and volume data were less often used in pricing decisions than considerations of the ability to cover business expenses, market pressures, and personal experience.

Our research findings point towards some specific recommendations for enhancing AMS Market News organic data for California's organic agrifood industry. To improve existing data, we recommend making stronger efforts to avoid gaps in organic data and providing clear explanation when data gaps occur. These data could also be expanded by including additional specialty crops, analyses, and data trend explanation. AMS Market News could be made more accessible by incorporating a simpler item-based search process, clearer explanations of terms, and overviews of data collection processes. Developing more visualizations of organic commodity data would also help AMS Market News remain relevant and useful among formal organic price and volume data offerings, as would email outreach, including regular updates on available data, and personalized or tailored data access points.

Introduction

The United States Department of Agriculture's (USDA's) Agricultural Marketing Service (AMS) Market News was established over 100 years ago to provide free, up-to-date, unbiased information on agricultural commodity prices, volumes, and movements, including data from wholesalers and retailers (USDA Agricultural Marketing Service, 2023b). These data help farmers and other business actors in the agrifood industry "evaluate market conditions, identify trends, make purchasing decisions, monitor price patterns, evaluate transportation equipment needs and accurately assess movement" (USDA Agricultural Marketing Service, 2023b). AMS Market News now also includes some price and volume data for agricultural commodities that have been certified organic to meet USDA's National Organic Program standards. As reported by AMS (2023a), in their staff's recent presentation to the Fruit and Vegetable Industry Advisory Committee, nearly 1,000 agricultural and livestock commodities are included in the AMS Market News reports; data for the certified organic versions of these items are included for just 200 of these commodities, or 20 percent. According to AMS (2023a), the reporting of organic data in AMS Market News started in 1992, was formally supported in the 2002 Farm Bill, and has grown steadily since 2003. AMS Market News now includes about 130 terminal market data points for organic agricultural products, about 80 retail data points for organic products, over 75 for movement of organic products, and just over 40 shipping point data points for organic products. These data also now include information collected from over 1,100 organic retail markets across the nation. While much of the retail data in AMS Market News comes from publicly advertised prices from major retail supermarkets, AMS Market News also includes some limited data on pricing and volumes of food products sold through local and regional markets (largely not including information from California), like farmers markets, direct-to-consumer sales, and farm-to-school programs (USDA Agricultural Marketing Service, 2023b).

USDA (2024) defines organic as: "a label that indicates that a food or agricultural product has been produced according to the USDA organic standards, which require operations to use practices that cycle resources, conserve biodiversity, and preserve ecological balance." While some elements of organic certification are based in long-standing agricultural management practices, the USDA organic certification standards were not implemented until 1997 (Guthman, 2004; Reganold & Wachter, 2016). Between 1997 and 2000, global sales of organic food grew by nearly 7 fold and organic land area grew by nearly 4 fold, with much of this growth being concentrated in the United States and Europe (Reganold & Wachter, 2016). In their review of existing research, Reganold and Wachter (2016) argue that organic does a better job of addressing sustainability goals than conventional agriculture practices: it consistently produces healthier soils, takes fewer energy inputs, reduces exposure to harmful pesticides and herbicides, ensures some animal welfare, and more. Organically grown versions of food items generally enjoy a price premium in the United States; in many cases, the organic price is 30% or more higher than the conventionally grown version of the same item (Carlson & Jaenicke, 2016). This

price premium often encourages more farmers to transition to organic production (Guthman, 2004; Schahczenski & Post, 2019).

The 2018 Farm Bill tasked AMS with improving the reporting of data on certified organic agricultural products. As part of this project, AMS partnered with our research team at the University of California to conduct an assessment of the gaps in price and volume data needs among various stakeholders within California's organic agrifood industry. Overall, academic analysis of how AMS Market News organic data are used among different segments of the organic agrifood system in California is limited. And a thorough understanding of the commodity price and volume data needs among these same organic agrifood businesses is underdeveloped. The present study addresses these knowledge gaps through collection and analysis of 26 exploratory interviews and 227 survey responses from California organic agrifood stakeholders. Our research participants were representatives from each relevant segment of the organic industry in California: producers, distributors and wholesalers, processors, and retailers.

We worked with AMS to develop specific research objectives that were focused on characterizing what stakeholders already know about the organic price and volume data that are currently available, what other data they need, and how this information is used in pricing decisions. Using that information, we then provide specific recommendations based on our findings that address how AMS Market News data offerings and/or accessibility could be improved to meet currently unmet data needs, as well as how AMS Market News might provide data currently available through other sources. These research questions and recommendations are listed below.

<u>Research questions</u>:

1. What do members of the organic industry know about AMS Market News' program and current organic data offerings?
2. What are the unfilled needs (gaps) in current offerings from both AMS Market News and other data sources?
3. How is pricing currently determined for organic commodities? Are producers/handlers utilizing AMS Market News or other data sources as a guide?

<u>Recommendations</u>:

1. How can current AMS Market News data be improved or increased to fill gaps in existing data offerings?
2. Should any other accessibility or access needs be addressed to improve use of AMS Market News data for organic industry stakeholders?
3. How can AMS Market News better provide data that is currently provided by other sources, including paid services, to better serve organic industry stakeholders?

In the pages that follow, we first provide some relevant research background for the study, including an overview of organic agriculture in California, organic price premiums, and the use of agricultural data. We then discuss our study methodology, elaborating on the use of interviews and surveys and details on our outreach and recruitment strategies. Next, we present our results, focusing on each of the research questions above and demonstrating what our survey and interview data reveal about each. Our recommendations for AMS Market News can be found following our results section; we include explanations of how each recommendation is grounded in our findings. The conclusion provides a concise review of the materials included herein.

Background

In *The Conquest of Bread*, Walker (2004) argues that modern agriculture in California has consistently represented the forefront of agricultural development in the United States, with fewer subsistence farmers and more agricultural innovations than other parts of the country. Since the late 1800s, California agriculture has largely concentrated on the new and most profitable products, more recently resulting in a concentration of California agriculture on specialty crops (Walker, 2004). In 2022, California farmers grew more than one third of the vegetables and almost three-quarters of the fruits and nuts produced in the United States, and the total value of agricultural products sold in California was $59 billion — 11% of total agriculture sales in the United States (CDFA, 2024; USDA, 2024).

California also leads the nation when it comes to organic agriculture. In 2022, California had 3,582 organic producers, 1,075 organic handlers, 166 organic processors, more than 1.8 million acres in organic production, and more than $11 billion in organic sales — 19% of the total agricultural sales in California and 36% of the total organic sales across the nation (CDFA, 2023). California is also the only state in the nation to have its own state organic program authorized by the National Organic Program (CDFA, 2024). Organic production in California is extremely diverse, including vegetables, tree fruits, nuts, vineyards, grains, pulses, dairy, meat, eggs, and animal feeds. One recent report surveying the research needs of California's organic producers found that about 80% of them grew tree and/or vine crops, nearly three times the national average of 26%, and almost 50% grew vegetables, herbs, and/or cut flowers while the national average was close to 40%. Meanwhile, 20% of California organic producers surveyed grew field crops, forage crops, and/or livestock, poultry, and dairy, while the national average was above 80% (Findley & Vélez, 2021).

Table 1.1 – California Organic Harvested Acreage by Top Commodities in 2022

Commodity	Harvested Acres
Cattle, Beef[a]	1,088,279
Fluid Milk, Cow[a]	64,218
Grapes (Wine, Table, Raisins)	55,792
Lettuce (Head, Leaf, Spring/Salad Mixes)	43,706
Almonds	41,059
Citrus	25,100
Spinach (Fresh and Processed)	25,000
Carrots	20,511
Broccoli	16,161
Tomatoes	14,991
Stone Fruit	12,393
Strawberries (Fresh Market)	6,741

Source: Page 15 of the California Agricultural Statistics Review 2022-2023 (CDFA, 2023)

[a] For beef and dairy, "Harvested acreage" refers to the area used for production.

In *Agrarian Dreams*, Guthman (2004) considers how historical structures of agriculture in California and regulatory changes have shaped the organic sector as of the late 1990s. Prior to state or national regulations of the term “organic,” independent organizations, including California Certified Organic Farmers (CCOF), were each developing and using their own standards for certification. As a result, there were no overarching standards for organic certification until the California Organic Food Act of 1979 defined “organic.” However, there remained vast differences in certification standards until California implemented a loose enforcement of the Organic Food Act (through registering with the state) in 1992 and USDA implemented the organic certification standards in 1997. Prior to 1997, different certifiers used everything from soil testing to proof of labor standards to farmer self-reporting to farmer organic system plans as evidence when issuing organic certifications. Some certifiers checked up on farmers and revoked certifications if standards were not maintained, while others did not. Notably, USDA’s national certification standards left in place the independent certifier system where farmers seek out the certifier of their choice, but USDA holds these certifiers to consistent standards.

According to Guthman (2004), early players in California’s organic movement helped build legitimacy and drive up consumer demand. This shift in consumer demand, coupled with the opportunity for increased profits in the organic sector, then drove more traditional players in California’s agriculture sector to transition some or all of their acreage to certified organic. In contrast to early adopters of organic, these more recent transitions were based in profit-seeking more than ideological shifts, and as such their production systems tended to focus less on things like biodiversity conservation or soil health and more on agronomic efficiency and economies of scale. In this way, these less ideological players pushed the average organic grower towards more industrial (but still technically organic) agriculture practices (e.g. input substitution). By the late 1990’s in California’s organic sector, price premiums had diminished as more growers entered the organic market and the demand for organic food was expanding beyond niche high-end markets. Thus, all organic growers were subjected to market forces that increased the need to focus on the letter of the law rather than the spirit of it. Guthman (2004) argues that the organic sector in California is neither the same as industrial agriculture nor the agrarian ideal. In short, there is certainly more work to be done to transition to a more just and sustainable agriculture system.

Years later, Reganold and Wachter (2016) reviewed the literature on organic agriculture and considered evidence on its sustainability. Overall, they found that organic does a better job of addressing sustainability goals than conventional agriculture. In terms of production, reviewed studies generally showed slightly lower yields for organic as compared to conventional production in industrial countries, but also lower pesticide exposure for farmers, workers, the

environment, and those consuming the food produced. Meta-analyses also suggested that bolstering organic production with agroecological practices could help close the yield gap between organic and conventional production. Their review of research on the environmental impacts of organic production showed that organic agriculture consistently produces healthier soil, as organic soils have more organic matter and lower pollution. Organic agriculture production also generally takes fewer energy inputs than conventional agriculture. In terms of economics, Reganold and Wachter (2016) found that, when organic price premiums are considered, growing organic is generally more profitable. Organic also has far fewer externalities than conventional agriculture, making the system-wide economics of organic — when negative outcomes are considered internal to the system rather than external — better for society. Ultimately, while both organic and conventional growing have more work to do to ensure the wellbeing of farmers and their families and communities, organic production positively impacts local communities, reduces farmer and farmworker exposure to pesticides and herbicides, and ensures an additional level of welfare for animals.

Research on organic agriculture increased notably in the early 2000's (Dias et al., 2015), but direct consideration of the price and volume data needs of actors in the organic industry remains limited. Many of these studies focused on market perspectives, certification as a way to set additional value for organic foods, consumer trust in organic foods, relationships between consumers and producers in the organic industry, and consumer motivations for buying organic foods (Dias et al., 2015). Considerations of data needs or pricing strategies were generally isolated from one another. For example, a recent assessment of the organic industry research needs in California included several references to pricing-related challenges in the organic industry, but did not directly consider if and how price and volume data could impact pricing decisions and/or future business planning (Findley & Vélez, 2021). Other research in this area was focused on the comparison between prices of organic and conventionally grown products (Carlson & Jaenicke, 2016; Schahczenski & Post, 2019), or evaluates the quality of existing data and the value and influence of publicly-available data in the marketplace (Home et al., 2017; Karali et al., 2019; Lusk, 2016; McKenzie & Darby, 2017).

A recent report by Schahczenski and Post (2019) outlined the role of pricing in encouraging more farmers to transition to organic production. They showed that product prices are consistently higher when organically grown, and then discussed some important considerations organic farmers make when pricing their products. They described market information as one aspect of more complicated pricing strategies that most organic farmers use but did not describe how that market information is obtained. The study also outlined several data sources for organic prices, including AMS Market News, but did not directly consider how these data sources are being used by organic businesses. They noted several aspects of these data sources that could pose challenges for California organic businesses interested in using them to guide business

decisions, including the relatively small number of crops included in AMS Market News organic data and the regionality of and cost associated with accessing other data sources.

Carlson and Jaenicke (2016) considered changes in organic price premiums between 2004 and 2010. They showed that most premiums fluctuated but did not steadily decrease or increase between 2004 and 2010; positive organic price premiums remained for all 17 products they reviewed, with ten of the products having 30% or greater price premiums. There was notable year-over-year changes in most products examined, but there was not consistent decline in most dairy, egg, fruit, and vegetable products. The notable exception was spinach, which did see a consistent and substantial decline in organic premiums (from 60% higher in 2004 to less than 10% higher in 2010). For processed items, there was also considerable fluctuation, with consistent declines in canned beans and coffee (both declined from about 100% in 2004 to about 50% in 2010). Soup and strained baby food saw slight but generally consistent increases in price premiums. Both soup and strained baby food went from having about 20% organic premiums in 2004 to just over 30% in 2010. They predicted that these premiums may fall more consistently after 2010 with the increase in imported organic products.

Home et al. (2017) found that few organizations that collect market data in the organic market systematically control for data quality. They focused on organic market data in Europe and conducted a survey and interviews with organic market data collectors and users. For the most part, the less the data collectors focus on the data quality, the less accurate users of those data find them to be. Import data and consumer level price data are exceptions to this, with high quality checks and low user quality rating. More data should be collected with robust quality checks but this by itself will not guarantee that users will perceive the increased quality of data. Accuracy of data, and to a lesser extent comparability and punctuality, were strongly correlated with overall data quality ratings, indicating specific areas where data collectors could target their quality checks. Relevance was not found to be a measure of data quality, likely because this is a prerequisite for data use; all data will be relevant for some users and irrelevant for others.

While some have considered the research and data provisioning of the USDA to result from unnecessary “mission creep” (Lusk, 2016), several scholars have demonstrated the lasting importance of the USDA providing publicly-available data on agricultural commodities (Karali et al., 2019; McKenzie & Darby, 2017). Karali et al. (2019) found that USDA crop reports still impact pricing in the corn, soy, and wheat marketplaces, despite competition from private data sources. In fact, market surprises following the release of some USDA corn grain stocks and wheat crop production reports were larger after January 2007 (a time period when more data sources were available in the market as compared to in earlier years). This provides strong support for the continued publication of USDA reports and data, even in an atmosphere of increased information options. McKenzie and Darby (2017) also showed a consistent market response to USDA’s rice reports. Specifically, futures prices adjust to the production information

released through USDA reports, especially from reports released in August through November, when yield information for the new rice season is newly-released. McKenzie and Darby (2017) argue that USDA reports are "vital to the price discovery process" and should continue despite the government costs associated with producing them. Both of these studies, however, examined conventional commodities and neither evaluated gaps in data availability. Overall, existing work indicates the importance of USDA data for market actors, and the importance of information on organic-specific market information.

Methods and Data Collection

Here we provide an overview of our research methods and data collection. Appendix A: Research Design provides more details on each method and an overview of our contact list development and outreach approach. We chose to use a mixed-methods approach to this research so that we could generate a thorough understanding of the data needs of different actors in California's organic agrifood industry. Interviews brought a nuanced understanding of people's experiences and needs, while surveys reached more respondents and captured more details on their data use preferences and individual business information. For both methods, we focused on collecting data from four distinct segments across California's organic agrifood supply chain: producers, distributors and wholesalers, processors, and retailers.

Our interview script focused on the details of the organization, producers' crop and livestock marketing strategies, non-producers' organic buying from farmers and distributors, and data use and outstanding needs. Within these topics, we asked about how producers found markets for their products, how buyers connected with producers and/or distributors, how they decided on fair pricing (both when buying and selling organic products, depending on their location in the food system), what data they already used, and what data they wanted or would be most useful for their business right now. We left questions open-ended to encourage discussion and leave room for the interviewee to share more in areas of interest to them.

We developed similar but distinct sets of survey questions for each industry segment. In these surveys, we asked some basic questions about the business and their practices, we asked for details about what data they already use, what they use it for, how it is structured, and how often they received updates; we also asked for specific feedback on AMS Market News organic data. We then asked participants to tell us about what their ideal data source would look like for organic price and volume information, and about what kinds of things they consider when they make pricing decisions. We wrapped up with demographic and business characteristics questions. For more details, our four surveys are included as Appendix B. We included a $40 incentive for early respondents to our survey; this included the first 400 farmers, and the first 100 of each other industry segment (distributors/wholesalers, processors, and retailers). These differences in expected response numbers were based on the differences in the populations of certified organic organizations in each of these segments within California's organic agrifood system.

We were particularly interested in how free and unbiased organic price and volume data, like that provided by AMS Market News, can support various historically marginalized actors in California's organic industry. Minkoff-Zern's (2019) research suggests that immigrant farmers, especially those from Latin America, make up a growing proportion of California farmers using organic and sustainable farming practices, despite historical and ongoing lack of institutional support. These immigrant farmers are generally fluent in Spanish rather than English. To ensure

California's Spanish-speaking immigrant farmers had access to participating in our research project, we had our survey and outreach materials for California farmers translated into Spanish.

We developed a list of 7,027 organic agrifood industry stakeholders across California. The list included company names and contact information for 2,995 producers, 2,711 handlers,[1] 928 organizations that do production and handling, and 393 retailers. Company names and contact information were gathered from the USDA Organic Integrity Database (OID), with supplementation from other data sources: the California Department of Food and Agriculture (CDFA), the California Department of Public Health (CDPH), the Independent Natural Food Retailers Association, USDA Supplemental Nutrition Assistance Program, and the National Produce Blue Book. We used emails and phone calls to recruit for interviews between mid-December 2023 and late May 2024. Because the best contact information we were able to secure for farms and businesses in the organic agrifood industry was mailing address, we decided that our main recruitment strategy for our surveys would be through three rounds of 6,809 postcards[2] in February, March, and April of 2024. We supplemented this outreach with 868 emails and 508 phone calls to organizations for which we were able to find these forms of contact information. We avoided the increasing problem of infiltration of the online survey by bots and fraudulent survey takers (Pinzón et al., 2023) by only reaching out directly to each intended recipient, rather than posting on listservs or social media.

Table 2.1 – Research Recruitment and Response Rates by Market Segment

	Producers	Handlers[a]	Retailers	Total
Survey Outreach	3,923	3,639	393	7,027[b]
Completed Survey Responses	152	61	14	227
Survey Response Rate	3.9%	1.7%	3.6%	3.2%
Interview Outreach	200	667	84	951
Completed Interviews	10	11	5	26
Interview Response Rate	5%	1.6%	6%	2.7%

[a] Handlers includes distributors/wholesalers and processors; see report footnote 1 for details.

[b] In this table, we included organizations that did production and handling both as producers and handlers, but did not count them twice in the total; for this reason, the sum of the categories is less than the total listed here.

[1] Several of our contact information sources (including the USDA) did not distinguish between distributors and processors. They instead defined these industry actors, along with other entities handling organic products in the agrifood supply chain between the farm and the consumer as "handlers." Where possible in our outreach, we identified distributors/wholesalers and processors by additional business information provided in the USDA Organic Integrity Database, or through reviews of the business name and/or information about the company available publicly online. However, it was not always possible to make this distinction. We therefore refer to these contacts as "handlers" when explaining our recruitment efforts here.

[2] See Appendix C for images of the postcards.

Table 2.2 – Survey Recruitment and Engagement Rates by Outreach Method

	Postcard	Phone	Email
Survey Outreach	6,809	508	714[a]
Survey Engagements	274	58	50
Survey Engagement Rate	4%	11.4%	7%
Completed Survey Responses	201[b]		26
Survey Response Rate	2.7%		3.6%

[a] We sent a total of 868 survey recruitment emails, but we were unable to track engagements for 154 of them due to a misunderstanding on our part of how Qualtrics tracked these numbers. To present the most accurate engagement rate in this table, we included only the 714 emails for which we had complete engagement information.

[b] Because we used anonymized links that directed people to a single landing page in postcard and phone outreach, we are unable to track completed survey responses from postcards and phone calls separately and are only able to present their combined rates.

Overall, we reached out to a total of 954 organizations with interview invitations and to 7,027 organizations with survey invitations. We conducted a total of 26 interviews and received 227 usable[3] survey responses; we had a response rate of 2.7% for interview recruitment and 3.2% for survey recruitment (Table 2.1). Response rates were higher for producers and retailers (between 3.6% and 6%) than for handlers (1.7% for surveys and 1.6% for interviews) (Table 2.1). Table 2.2 elaborates on our engagement and response rates for our different methods of survey recruitment. Because phone and email recruitment were supplemental to postcard recruitment, nearly all organizations that were called or emailed were also sent a postcard; only 29 organizations received an email and no postcard. Our engagement rate was 4% for postcards, 7% for emails, and 11.4% for phone calls (Table 2.2). Email recruitment also seems to have generated a higher rate of usable surveys (3.6%) than postcards and phone calls (2.7%).

Survey data were collected using Qualtrics and were cleaned and analyzed using R and RStudio. We use descriptive statistics and bivariate analyses in the findings sections below to address each of our research questions. All survey results we present here come from responses that were at least 50% complete. We conducted a grounded theory analysis of our interview data. First, we used Otter.ai, an automated transcription and recording service, to record and provide an initial transcript of our interviews. We reviewed each transcription for accuracy and corrected any errors to finalize them before coding the transcriptions for common themes using QualCoder-3, an open-source qualitative data analysis software. Common themes emerged for each of our research questions, and these themes are discussed in our findings sections below. Our survey and interview data compliment and inform one another. Common themes in our interview data are used to demonstrate the meaning behind some of our survey findings. And survey data showing broader frequencies of particular findings helped guide which common interview themes we highlight as most important.

[3] We considered a survey response usable if it was at least 50% complete.

Findings

Overall, we completed 26 interviews and collected 227 survey responses. We heard from more producers than distributors and wholesalers, processors, or retailers.[4] Most producers and distributors/wholesalers who participated in our research had small to mid-sized operations focused on specialty crops, especially vegetables, fruit, and/or nuts. Processors were also mostly small or mid-sized, and they worked with a diverse set of organic agricultural products. Most of the retailers were single-store grocery retailers, including smaller natural grocers and food cooperatives. Overall, more than half of our interviewees and nearly half of our survey respondents represented businesses that were majority-owned by people from one or more historically marginalized group. We measured majority-ownership as at least 50% ownership and considered the following to be historically marginalized groups: veterans, beginning producers who had been producers for less than 10 years, women, and people of color.

Here our main research findings are presented in list form below the specific research questions. The following sections provide detailed overviews by research question. Overall, we find a consistent use of informal organic price and volume data sources, like information gathered through conversations or local data collection. The use of AMS Market News organic data may be hampered by a lack of familiarity with it and concerns about the accuracy, consistency, and breadth of information included. Covering business expenses, maintaining margins, and adapting to market pressures often drive pricing decisions instead of available data on organic prices and/or volumes.

Main research findings by research question:

1. What do members of the organic industry know about AMS Market News' program and current organic data offerings?
    a. Price and volume data use is widespread in California's organic industry.
    b. Informal data sources, like conversations with industry contacts, price comparisons, or other first-hand data collection, are more common sources for organic market data than AMS Market News. Distributors, who provide the key market function of matching supply and demand, are the most likely to use AMS Market News data.
2. What are the unfilled needs (gaps) in current offerings from both AMS Market News and other data sources?
    a. Gaps in AMS Market News organic data include: data accuracy and consistency, geographies and products covered, and presentation and dissemination.

[4] This is roughly proportional to the total numbers of organic actors in each market segment within California. In 2022, California had 3,582 organic producers, 1,075 organic handlers, 166 organic processors (CDFA, 2023), and only one organic retailer was listed in the USDA Organic Integrity Database within California as of late 2023 when we reviewed this source (USDA, 2023).

   b. Ideally, research respondents want visual presentations of individual data points that included at least some explanation and had regular updates delivered via email and accessible on a website.
3. How is pricing currently determined for organic commodities? Are producers/handlers utilizing AMS Market News or other data sources as a guide?
   a. The ability to cover business expenses, information from informal data sources, and market pressures commonly shape pricing decisions.
   b. Formal data sources, like and including AMS Market News organic data, are not central to most respondents' decisions about price-setting.

Overview of Research Participants

In this section, we provide an overview of our research respondents to provide some understanding of who within California's organic agrifood industry these findings most represent. Overall, we completed 26 interviews (10 with producers, 6 with distributors, 5 with processors, and 5 with retailers) and had 227 survey responses that were all or mostly complete (152 from producers, 27 from distributors, 34 from processors, and 14 from retailers). Our survey respondents are mostly smaller operations with a few large outliers. Producers who completed our survey mostly work with vegetables, fruit, and/or nuts. Distributors are mostly small to mid-sized and work most often with vegetables and/or fruit. Processors who responded to our survey are also mostly small or mid-sized but work with a much more diverse set of organic agriculture products. And most (64%) of the retailers that took our survey are single-store grocery retailers. Overall, nearly half (48%) of our survey respondents represent businesses that are majority-owned by historically disadvantaged groups. Similar to survey respondents, most producers we interviewed have small operations focused on vegetables and/or fruit or nut orchards, but one manages a large operation and grows organic feed and seed. Half of the distributors we interviewed also produce some or all of the products they distribute (known as grower-shippers), and nearly all work with specialty crops. The processors we interviewed are also mostly smaller operations that each work with different types of products. The retailers we interviewed are all smaller natural grocers or food cooperatives with between 1- 5 store locations[5]. Overall, 16 of our interview respondents represent operations that are majority-owned by people from historically marginalized groups[6].

Survey Participants

An overview of responses to various survey questions about business details are included in Table 3.1 below and reviewed here. While the average total number of acres farmed for our 152 producer survey respondents is 452 acres, more than 50% of these producers work with 16 acres or fewer. The difference between these two numbers indicates that there are a handful of very large farms, in terms of acreage, in our survey, but that many of our respondents manage operations much smaller than the average of 452 acres. This is reflected in producer responses about gross sales as well; 20% of the producers who took our survey have gross sales last year of less than $10,000, another 46% have gross sales of at least $10,000 but less than $1,000,000, and only 13% have gross sales of $1,000,000 or more. On average, these producers have 2 managers, including themselves, that manage the day-to-day operations of the farm. The founding years for these farms cover a wide range; these farms were founded as early as 1880 and as late as 2023. On average, these farms started in 1993 but half started during or after 2003.

[5] While we included several larger supermarket chains in our interview and survey outreach, we were almost entirely unsuccessful in getting larger chain responses. We did receive one survey response from a retailer with more than 1,000 retail stores.

[6] We measured majority-ownership as at least 50% ownership and considered the following historically marginalized groups: veterans, beginning farmers and ranchers who had been producers for less than 10 years, women, and/or people of color.

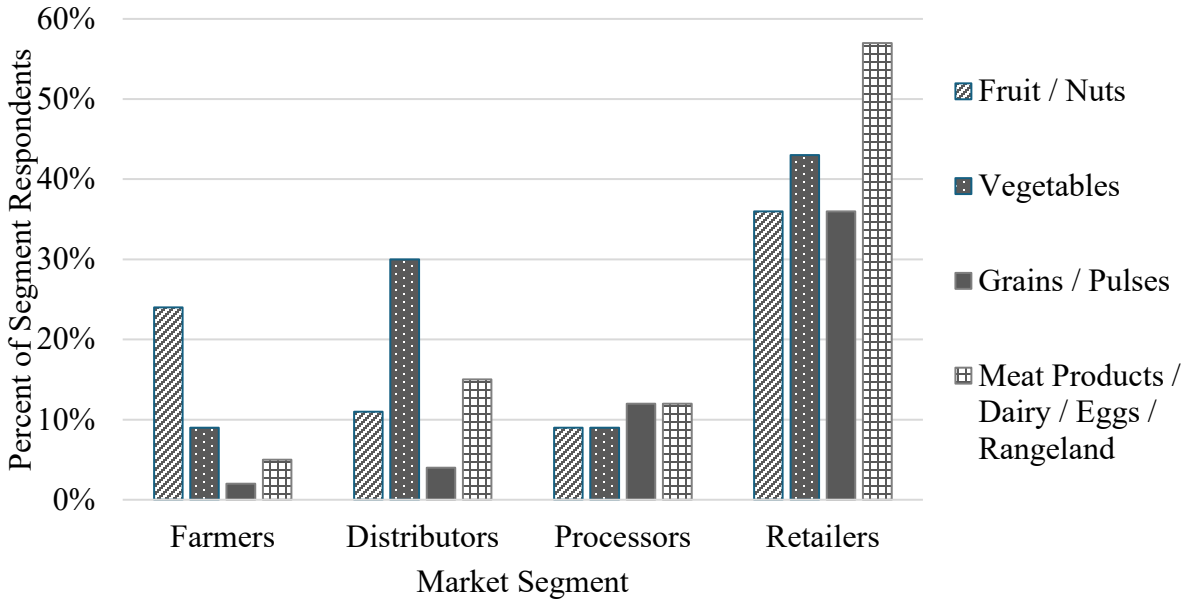
Table 3.1 – Descriptives of California Organic Food Businesses by Market Segment

	Farmers (N=152)	Distributors (N=27)	Processors (N=34)	Retailers (N=14)
Size	Num. Acres Farmed… Mean: 452 Median: 16	Num. Warehouses… Only 1: 12 (44%) 2-5: 5 (19%) No Response: 10 (37%)	Num. Facilities… Only 1: 18 (53%) 2-5: 3 (9%) No response: 13 (38%)	Num. Retail Stores… Only 1: 9 (64%) More than 1: 3 (21%) No response: 2 (14%)
Gross Sales Last Year	Less than $10k: 30 (20%) $10k - $99k: 40 (26%) $100k - $999k: 31 (20%) $1mil. or more: 19 (13%) No response: 32 (21%)	Less than $100k: 0 $100k - $999k: 4 (15%) $1mil. - $9mil.: 7 (26%) $10mil. or more: 3 (11%) No response: 13 (48%)	Less than $100k: 3 (9%) $100k - $999k: 6 (18%) $1mil. - $49mil.: 10 (29%) $50mil. or more: 3 (9%) No response: 12 (35%)	Less than $999k: 1 (7%) $1mil. - $9mil.: 4 (29%) $10mil. - $49mil.: 5 (36%) $50mil. or more: 2 (14%) No response: 2 (14%)
Number of Managers	Mean: 2.5 Median: 2	Mean: 14 Median: 8	Mean: 22 Median: 7	Mean: 34 Median: 15
Business Founding Year	Mean: 1993 Median: 2003	Mean: 1999 Median: 2000	Mean: 2005 Median: 2010	Mean: 1982 Median: 1979
Main Organic Products	Fruit / Nuts: 36 (24%) Vegetables: 14 (9%) Grains / Pulses: 3 (2%) Flower / Nursery: 7 (5%) Cropland (not otherwise specified): 14 (9%) Rangeland: 7 (5%) Not specified: 71 (47%)	Fruit: 3 (11%) Vegetables: 8 (30%) Grains / Pulses: 1 (4%) Meat products: 4 (15%) Value-added: 1 (4%) Other: 4 (15%) Not specified: 9 (33%)	Fruit / Nuts: 3 (9%) Vegetables: 3 (9%) Grains / Pulses: 4 (12%) Meat products: 4 (12%) Other: 4 (12%) No response: 13 (38%)	Fruit / Nuts: 5 (36%) Vegetables: 6 (43%) Grains / Pulses: 5 (36%) Dairy / Eggs: 5 (36%) Meat products: 3 (21%) Flower / Nursery: 3 (21%) Value-added: 1 (7%) Other: 2 (14%) No response: 1 (7%)
Sales / Purchasing Channels	>50% of sales to… Distributors: 60 (39%) Processors: 17 (11%) Retailers: 18 (12%) Farmers Markets: 15 (10%) CSAs: 2 (1%) Restaurants: 3 (2%) Institutions: 2 (1%) Other: 20 (13%) Not specified: 21 (14%)	>50% of purchasing from… Farmers: 7 (26%) Processors: 5 (19%) Other Distributors: 4 (15%) No response: 9 (33%) >50% of sales to… Grocery: 8 (30%) Food service: 2 (7%) Processors: 9 (33%) Individuals: 1 (4%) Other: 2 (7%) No response: 9 (33%)	>50% of purchasing from… Farmers: 6 (18%) Distributors: 11 (32%) No response: 12 (35%) >50% of sales to… Distributors: 6 (18%) Grocery: 8 (24%) Food service: 1 (3%) Individuals: 2 (6%) Other processors: 3 (9%) No response: 12 (35%)	>50% of purchasing from… Farmers: 3 (21%) Processors: 1 (7%) Distributors: 8 (57%) Other: 1 (7%) No response: 1 (7%) >50% of sales to… Individuals: 12 (86%) Food service: 0 Institutions: 0 No response: 1 (7%)
Business Type	Sole Propriet.: 69 (45%) Partnership: 15 (10%) Family Operation: 19 (13%) Independent Corp.: 4 (3%) Cooperative: 0 Non-profit: 1 (1%) Other: 19 (13%) No response: 24 (16%)	Sole Propriet.: 3 (11%) Partnership: 2 (7%) Family Operation: 5 (19%) Independent Corp.: 4 (15%) Cooperative: 0 Non-profit: 0 Other: 0 No response: 13 (48%)	Sole Propriet.: 6 (18%) Partnership: 5 (15%) Family Operation: 4 (12%) Independent Corp.: 1 (3%) Cooperative: 2 (6%) Non-profit: 0 Other: 4 (12%) No response: 12 (35%)	Sole Propriet.: 3 (21%) Partnership: 1 (7%) Family Operation: 3 (21%) Independent Corp.: 0 Cooperative: 4 (29%) Non-profit: 0 Other: 1 (7%) No response: 2 (14%)
Majority (50% or more) Ownership	Veterans: 2 (1%) Beginning farmers: 12 (8%) People of color: 10 (7%) Women: 30 (20%) Combination: 28 (18%) None of these: 23 (15%) No response: 46 (30%)	Veterans: 0 People of color: 5 (19%) Women: 2 (7%) Combination: 2 (7%) None of these: 1 (4%) No response: 17 (63%)	Veterans: 0 People of color: 4 (12%) Women: 4 (12%) Combination: 3 (9%) None of these: 6 (18%) No response: 16 (47%)	Veterans: 0 People of color: 1 (7%) Women: 3 (21%) Combination: 2 (14%) None of these: 2 (14%) No response: 6 (43%)

Source: Organic Data Initiative Gap Analysis UC Davis Surveys (2024)

For many producers who took our survey, their main organic products are fruit and or nuts (24%) or vegetables (9%). Only 5% of our producers work mainly with animals or flowers and/or nursery plants, and only 2% grow grains or pulses. Producers who took our survey most often sell more than half of what they produce to distributors (39%) or processors (11%), but about 12% sell more than half of what they produce directly to retailers and another 11% sell mostly directly to consumers at farmers markets or through community supported agriculture programs (CSAs). Very few producers who took our survey sell primarily to restaurants (2%) or institutions (1%), but about 13% report selling more than half of what they produce through other sales channels. The majority of these farms are sole proprietorships (45%), partnerships (10%), or family operations (13%), and the majority (55%) are owned by people from historically marginalized groups (veterans, beginning farmers and ranchers, women, and/or people of color).

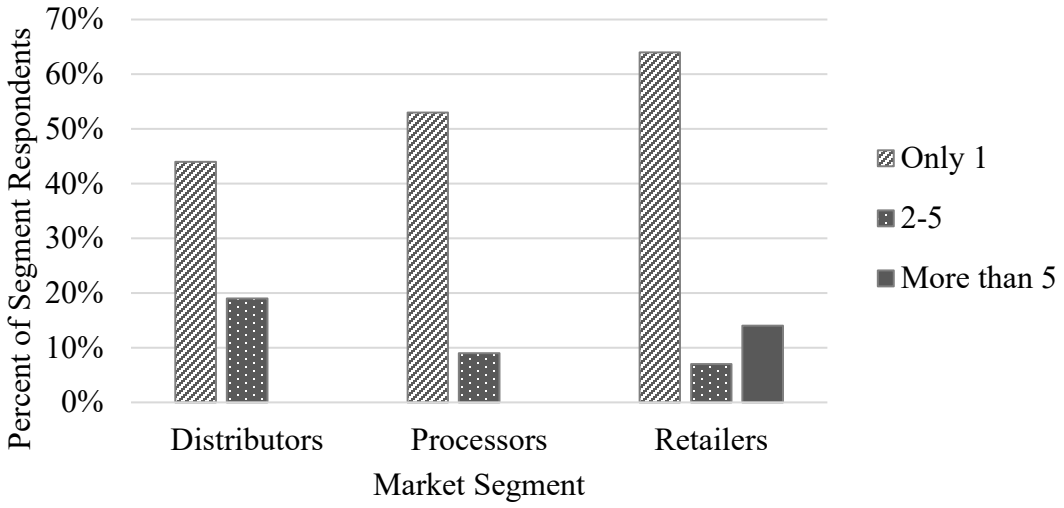
Figure 3.1 - Main Products by Market Segment



Source: Organic Data Initiative Gap Analysis UC Davis Surveys (2024)

Fewer distributors responded to our survey; only 27 completed at least half of the survey. The distributors who responded to our survey are mostly small or medium sized, with 44% having a single warehouse and another 19% having between 2-5 warehouses. While none of these operations have gross sales less than $100,000 last year, some (15%) have gross sales of at least $100,000 but less than $1,000,000, and 26% have gross sales between $1,000,000 and just under $10,000,000. Only 11% have gross sales over $10,000,000. Half have 8 or fewer managers running their day-to-day operations, but the average for this measure is 14 which indicates some large outliers on this metric. These distribution companies were founded between 1970 and 2022, with the average founding year being 2000.

Figure 3.2 - Number of Locations[a] by Market Segment



Source: Organic Data Initiative Gap Analysis UC Davis Surveys (2024)

[a] Locations represent number of warehouses for distributors, number of facilities for processors, and number of retail stores for retailers. Producers are excluded here because we did not ask them about number of farming locations on our survey.

Many of these distributors' main organic products are vegetables (30%) or fruit (11%), while 15% work mainly with organic meat products and another 15% work mainly with other organic products, like mushrooms, spices, or herbs. Only one distributor in our survey has grains and pulses or value-added products as their main organic products. These distributors do most of their purchasing from farmers (26%) and less from processors (19%) or other distributors (15%). Meanwhile, they often sell the majority of their products to grocery stores or supermarkets (30%) or processors (33%), with fewer selling primarily to food service (7%), direct to consumer (4%), or though other channels (7%). Many of these distributors are family operations (19%), sole proprietorships (11%), or partnerships (7%), but a handful (15%) are independent corporations. And about a third (33%) are majority-owned by people from historically marginalized groups.

Of the 34 processors who completed at least half of our survey, more than half (53%) operate one processing facility and another 3 (9%) have between 2-5 processing facilities. In terms of gross annual sales, these processors are fairly evenly distributed across categories, with most having gross sales last year of between $100,000 and $1,000,000 (18%) or between $1,000,000 and $50,000,000 (29%). Only three processors (9% each) fall in the lower (less than $100,000) and higher ($50,000,000 or more) categories of gross sales. Half have seven or fewer people managing day-to-day operations, but the average number of managers (22) is boosted by a few processors with very large numbers. These processing companies were founded between 1956 and 2020, with half starting on or after 2010 and starting in 2005 on average.

The main organic products these processors work with are fairly diverse; 12% each categorized their main organic products as primarily grains or pulses, meat products, and other products, while 9% each categorized their main organic products as vegetables or fruit/nuts. These processors are more likely to purchase more than half of their raw organic commodities from distributors (32%) than directly from farmers (18%), and often sell the majority of their products to grocery stores and supermarkets (24%) or to distributors (18%). A few of these processors sell the majority of their products to other processors (9%), directly to individuals (6%), or to food service (only one processor). Nearly half of these processors are sole proprietorships (18%), partnerships (15%), or family operations (12%); only one is an independent corporation and two (6%) are cooperatives. One third of these processors are majority-owned by people from historically marginalized groups.

Only 14 retailers completed at least half of our survey, and the majority of them (64%) are small stores with only one location. Three have more than one location, with one of these having more than 1,000 store locations. Gross annual sales are also relatively consistent, with about a third each reporting sales between $1,000,000 and $10,000,000 (29%) and between $10,000,000 and $50,000,000 (36%). Only one store reported gross sales of less than $1,000,000 last year, and only two reported gross sales of greater than $50,000,000 last year. Half the retailers in our survey have 15 or fewer people managing day-to-day operations, while the average number of managers for all retailers is much higher (34). These retail businesses tend to be older than the other types of operations in our survey; these stores were founded between 1889 and 2021, with an average founding year of 1982 and half the operations starting before 1979.

While we asked retailers how they would categorize the main organic products they work with, this question was worded as: “About what percent of the certified organic products your organization regularly sells are each of the following?” Our results indicate that 36% of retailers sell either fruit or nuts as their main organic product, while another 43% categorized their main organic products as vegetables and another 36% each categorized their main organic products as grains or pulses and dairy or eggs, and so on (Table 3.1). Several retailers reported more than 50% of the organic products they regularly sell being in several of these categories. As grocery stores generally stock many of these categories at once, often with at least some organic options, some retailers may have interpreted this question differently than distributors or processors who were asked a similar question. What is clear from these responses is that retailers are more likely to sell organic fruit or nuts, vegetables, grains or pulses, and dairy or eggs than they are to regularly sell organic meat products, flowers or nursery plants, value-added products, and other products. The majority of these retailers (57%) purchase mostly from distributors, while 21% purchase mostly directly from farmers. And nearly all (86%) sell primarily directly to consumers, rather than to food service operations or institutions. Most are either a sole proprietorship (21%),

a partnership (one retailer), or a family operation (21%). Another 4 (29%) are food cooperatives. About 40% are majority-owned by people from historically marginalized groups.

Interview Participants

Our interviewees were similarly representative of smaller specialty crop focused operations. We talked to 10 farmers in our interviews, most of whom grow specialty crops. The three main types of farmers we interviewed are those that grow mainly produce, those that grow exclusively fruit and/or nuts, and those that grow fruit and/or nuts along with another specialty crop. The three produce farmers we talked to have smaller operations; two have farms of less than 10 acres, and one manages two farms that were each about 50 acres. These produce farmers all grow 100% certified organic produce, though one also produces some non-certified organic meat and eggs. These produce farmers sell their products through a variety of channels, mostly direct to consumer, like at farmers markets, with some sales directly to small grocery stores or restaurants. The two smaller produce farms are majority-owned by people from historically under-represented groups, and the larger produce farm is owned by a university. The three orchard farmers we interviewed also have small farms, ranging from 15 to about 30 acres. These orchards are all 100% certified organic and include tree fruit and nuts. Two of these orchard farmers sell through brokers, but one sells direct to consumers online and through a farm-stand. All three of these orchards are majority-owned by people from historically disadvantaged groups. We also talked to three farmers who primarily manage orchards but also grow either vegetables, cut flowers, or vineyards. These mixed orchard farmers have operations between 20 and 35 acres, and all grow 100% certified organic products. One also processes their orchard harvest on-site. These growers sell their products through a variety of channels: at farmers markets, directly to small grocery stores, through brokers, and directly to processors. And two of these mixed orchards are majority-owned by people from historically marginalized groups. We interviewed one larger commodity grower with a farm of close to 9,000 acres who grows about 300 acres of organic feed and seed. This grower sells their organic crops mostly through brokers. This farm employes about 90 people, mostly people of color, but the operation is not majority-owned by people from historically marginalized groups.

We interviewed a total of six distributors. Three are also growers, two of whom purchase from other growers to supplement their own supply, and one imports their products grown in Mexico into the United States to supplement our local off-season supply. Two of these grower-shippers work exclusively with tree fruit and one with produce. One rarely grows and/or distributes organic, another grows and sells about 50% organic, and the other grows and sells almost exclusively organic. Two of these operations are majority-owned by people from historically disadvantaged groups. The other three distributors we interviewed focus only on distribution. One is a medium-sized distributor of spices, about 10% of which are organic. They source mostly from processors, but also from some farmers; most of their source ingredients are imported. This distributor is majority-owned by people from historically marginalized groups.

The other two distributors we talked to work with produce, one almost exclusively organic, the other about 50-60% organic. These distributors source from farmers, are smaller operations (about $8-$15 million in gross annual sales and 2-3 employees), and are not majority-owned by people from historically disadvantaged groups.

Five of our interviews are with processors, four smaller ($1-$40 million in gross annual sales) and one large (about $800 million in gross annual sales). Two of these processors work mostly with certified organic products, while two work with about 30%-40% organic products and one works with about 1% organic products. Most of these processors purchase directly from producers, but the large processor purchases mostly from suppliers who have already done some processing of the ingredients. One smaller processor works with similar suppliers as well as producers. These processors each work with different products: cut greens, meat products, wine, cereal mixes, and consumer packaged goods. Only two processors we interviewed represent operations that are majority-owned by people from historically disadvantaged groups.

The five retailers we interviewed are small, independent local grocers and/or food cooperatives. Two are food cooperatives, owned by their shopper-members, and one is worker-owned through an Employee Stock Ownership Plan (ESOP). The largest retailer has 3-5 stores and about $50 million in annual sales. Two more have 2 stores and about $40 million in annual sales. And the other two are single stores with about $10-$20 million in annual sales. These stores typically stock about 40% to 60% organic products, with all or nearly all of their produce being certified organic. All these retailers source from distributors as well as directly from farmers; one store also mentioned working with local processors. Three of these retailers are majority-owned by people from historically disadvantaged groups. Two (one ESOP and one cooperative) do not track ownership demographics, but the majority of the board of directors for one of these are people from historically disadvantaged groups. Overall, these retailers, like most of our interview and survey participants, represented smaller operations across California focused mostly on organic specialty crops.

Knowledge of Existing Data

In this section we review our research findings related to our first research question, "What do members of the organic industry know about AMS Market News' program and current organic data offerings?" To summarize, we find that using some kind of organic price and volume data is common among our research participants. And respondents often use multiple sources of organic price and volume information to assess market conditions. However, informal data sources, like conversations with industry contacts, price comparisons, or other first-hand data collection, are more common sources for organic market data than AMS Market News or other more formal data sources.

Overall, our survey results indicate that price and volume data use is widespread in California's organic industry. We asked survey respondents, "Do you or others in your [farming, etc.] operation regularly use data on organic prices and/or volumes (including data your own business/organization tracks and/or data from outside organizations)?" Responses from each group are included in Table 4.1 as using no data when respondents responded "No" to this question (61% of farmers, 43% of retailers, 35% of processors, and only 19% of distributors), or using any data when respondents selected "Yes" for this question (59% of distributors, 50% of retailers, 41% of processors, and only 34% of farmers). These responses demonstrate that using some form of price and volume data is common across most market segments, but is most common among distributors, and least common among farmers, with retailers and processors falling in the middle. Over half of the distributors we heard from regularly use data on organic prices and/or volumes, while only a third of farmers did.

Table 4.1 also shows the use rates of several common organic price and volume data sources, including AMS Market News. These are responses to our survey question, "Of the following, what sources of organic price and volume data do you or others in your [farming, etc.] operation reference most? (choose up to 3)" We also asked that any additional regularly referenced data source not listed be included as "Other", for which we also included a text entry for respondents to provide additional details. In Table 4.1, SPINS and Nielsen were only included as data source options in the retailer survey, and are therefore listed as n/a for the other market segments. These options were included for retailers after we conducted a few interviews with retailers where these were discussed as commonly-used data sources among retailers. The rest of the options included for this question were chosen through our own understandings the industry, as well as data sources that Schahczenski and Post (2019) outline as most useful for organic farmers making decisions about pricing in their article for the National Center for Appropriate Technology.

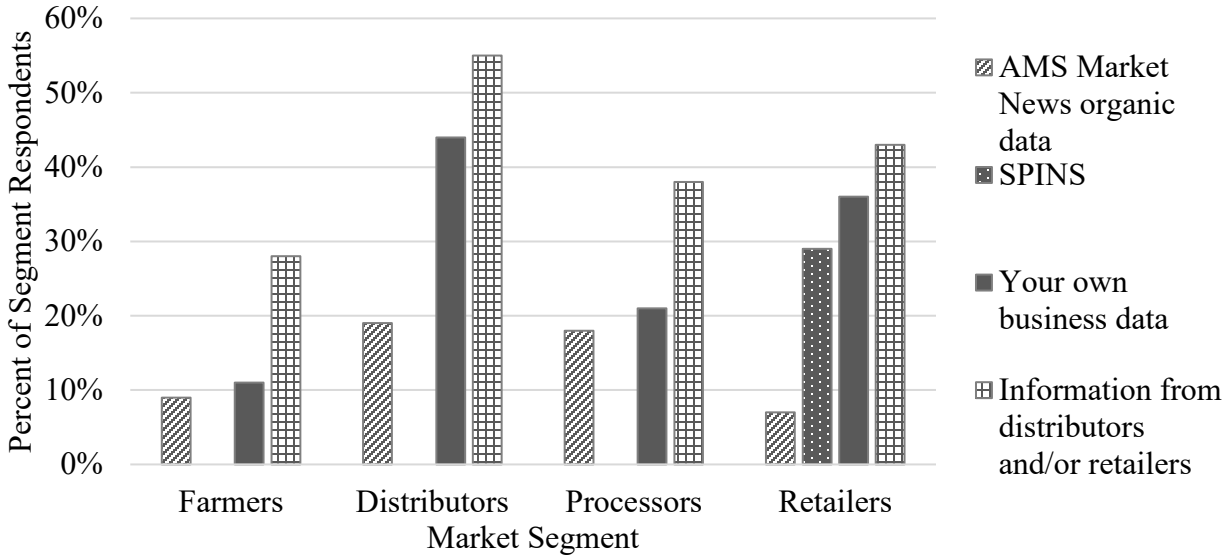
Table 4.1 – Use of Organic Price and Volume Data Sources by Market Segment

Data Source Used	Farmers (N=152)	Distributors (N=27)	Processors (N=34)	Retailers (N=14)
None	93 (61%)	5 (19%)	12 (35%)	6 (43%)
Any	52 (34%)	16 (59%)	14 (41%)	7 (50%)
AMS Market News organic data	14 (9%)	5 (19%)	6 (18%)	1 (7%)
USDA National Agricultural Statistics Service (NASS) Census of Agriculture	6 (4%)	0	2 (6%)	0
SPINS[a]	n/a	n/a	n/a	4 (29%)
Nielsen[a]	n/a	n/a	n/a	0
Organic Farmers Agency for Relationship Marketing (OFARM)	1 (0.7%)	1 (4%)	1 (3%)	0
Mercaris, Inc.	0	0	0	0
Organic Grain Research and Information Network (OGRAIN)	1 (0.7%)	0	1 (3%)	0
Organic Trade Association (OTA)	1 (0.7%)	1 (4%)	0	1 (7%)
Maine Organic Farmers and Gardeners Association (MOFGA) Organic Price Reports	0	0	0	0
Data your own business / organization tracks about its operations	17 (11%)	12 (44%)	7 (21%)	5 (36%)
Information from distributors or wholesalers outside your organization	26 (17%)	11 (41%)	10 (29%)	3 (21%)
Information from retailers outside your organization	17 (11%)	4 (15%)	3 (9%)	3 (21%)
Other	14 (9%)	2 (7%)	1 (3%)	0
Total number of data sources used within each market segment	9	7	8	6

Source: Organic Data Initiative Gap Analysis Surveys (2024)

[a] SPINS and Nielsen were only included as survey response options in the retailer survey, and are therefore listed as n/a for the other market segments. The zero listed for retailers for Nielsen therefore represents no retailers using that data source; n/a listed for the other market segments represents producers, distributors, and processors not having the option to report using Nielsen as a data source on the survey.

Figure 4.1 - Main Data Sources Used by Market Segment



Source: Organic Data Initiative Gap Analysis Surveys (2024)

AMS Market News organic data are used by some of our respondents, but not as often as information from more informal sources. Distributors and processors are the most likely to use "USDA Agricultural Marketing Service (AMS) Market News Organic Price and Volume Data"; almost 20% of each of these two groups chose it as one of their top three sources of information on organic prices and volumes. In contrast, fewer than 10% of farmers and retailers use AMS Market News as one of their top three sources for organic price and volume data. Respondents from all market segments are more likely to use informal data, including "Data your own business / organization tracks about its operations," "Information from distributors or wholesalers outside your organization," and "Information from retailers outside your organization." Farmers (17%) and processors (29%) are most likely to use information from distributors or wholesalers outside their organization. And distributors (44%) and retailers (36%) are most likely to use data their own business tracks about its operations.

However, AMS Market News organic data may be spread throughout California's organic agrifood industry more than through direct reliance on this resource. For example, 17% of farmers, 29% of processors, and 21% of retailers are using data from distributors, but 19% of distributors are using AMS Market News organic data. Therefore, it is likely that at least some of the distributor data being relied on by 20-30% of the other market segments are influenced by or originat as AMS Market News organic data. At the same time, distributors are most likely (44%) to rely on data their own organization tracks, suggesting another common source of the information being passed on to other market segments. In our interviews, several people talked about referencing distributor pricing sheets to assess market pricing for products. It may be the case that distributors are using their own data along with AMS Market News organic data when

building these pricing sheets.[7] This would result in a more widespread, but likely unreferenced, influence of AMS Market News organic data throughout the industry than what these results directly show.

Our interviews also demonstrate the consistent use of informal data sources and provide additional detail on how this information is gathered. While some interviewees were familiar with AMS Market News organic data, few use them on a regular basis. The use of price comparisons and references to other aggregate data platforms are more common.[8] These are the consistent themes that emerged from our review of interview responses related to data use. We discuss each type of data use independently below, but many of the people we talked to use multiple methods to keep track of market prices. Some compare their prices to those of others in the market, often through observing different retail locations (like local groceries, chain supermarkets, and/or farmers markets), while others review aggregated data/information sources.

When we asked about data use, many respondents discussed price comparisons either as their main information source for market prices, or as a supplement to a more formal information source, like an aggregated data platform. Comparing or checking prices is used by 3 out of 5 retailers we interviewed to understand local competition more clearly, sometimes in conjunction with other data sources. For example, in the quote below, from a small grocery retailer, our interviewee describes their staff, especially for fresh products, regularly going to their local competitors' stores and looking at their prices to get a better sense of how their own pricing compares to their local market. This research was supplemental to their usage of an aggregated data source, which they describe elsewhere in the interview as only a single piece of price and volume information.

> *But our team also goes out and price checks against our local competitors. … Especially our produce team. All of our fresh teams, produce, meat, and seafood are always checking out what the other grocery stores are charging in town. And they will go, they'll literally go and just take a look.*
> (*Small grocery retailer, Interview 5*).

Producers often did something similar, observing competitor pricing at farmers markets or the prices at local grocery stores. For example, this produce and wine grape grower describes using the pricing at the local food co-op as a measure of market pricing.

> *So whatever the co-op's paying, that is kind of what we go by, what I go by. (Produce & wine grape grower, Interview 8)*

[7] Ultimately, we are not able to determine the specific extent to which reliance on informal data sources may represent a broader dissemination of AMS Market News organic data because we did not ask for details about between-segment data sharing practices specifically on the survey or in our interviews. As a result, the original source of the data shared between segments is unclear, yet it is most likely that distributors' price information is coming from multiple sources.

[8] We suspect this is also the case for conventional agrifood system actors, but we do not have the information to verify this because we only talked to organic agrifood system actors in this research.

This producer also talks about setting their own prices somewhat subjectively, sometimes lower to move a product, sometimes higher because they could. But it is these local food co-op prices that they use as a proxy for the market-wide price for things. They use these prices more as an information source than as a strict guide for their own pricing decisions.

For other producers, pricing and volume data are not useful because they feel constrained to selling their products through a broker who sets the price. In these cases, brokers often manage the tree fruit or nut picking, washing, other processing, and packing, and provide growers a per-bin payment for their crop. All three of the orchard farmers we interviewed express concern about not getting a high enough price for their products through this method to even cover their own expenses in caring for their orchards. While these orchard farmers initially said that price and volume data are not useful for them, they each mention comparing their own broker experiences, especially when it came to price, with other farmers. For example, one tree fruit grower mentions comparing broker prices with their neighbors, finding that their neighbors are getting better prices for their products when selling through other brokers.

> *Lately, I have made contacts with our local packer, seller, whatever you can call it. It's [packer name], and the good thing about them is I have a personal relationship with the owner and that company is so huge that there is no danger that they might [do] fly by night kind of things. That has happened and farmers lose money on that. And another good thing is that … once I sign the contract with them, they will come pick the fruit, load them up for the transport [of] it, take them into their packing area and I will simply get the money by the bin. So that is a good thing for a smaller farmer. This is definitely a plus sign. You don't have to chase each and every person to get the operation done. So this [is a] good thing. But the bad thing is I have no control [over] what price will I be getting. And I am comparing with my neighbors. … So there are three of us, basically, but the other two have been using somebody else and I have realized that I'm always getting the low end of the selling price. So this is something that I am going to raise up with [packer name], why that is happening. The reason is, basically, I don't control any price for my product. I just give it and they sell it and whatever expenses they have, they give me the price by the bin.*
> *(Tree fruit producer, Interview 9)*

This producer outlines the benefits of working with a broker, in that they take on much of the costs of getting the tree fruit from the trees to the buyers. The producer also expresses frustration in not having any control over pricing and being unsure if they are receiving a fair price. Even though they feel they have little control over pricing, the price comparisons they did with neighboring farms is empowering this grower to challenge the price they are being offered through the local broker they work with.

Others — mostly distributors and processors — describe price comparisons that were more informal and relied on personal experience and/or market relationships. Often this consists of phone calls with other buyers and/or comparing prices to their own experience having worked in the market for many years. Sometimes it involves reviewing the pricing sheets from relevant distributors. One distributor describes the process as calling their “shipping friends” and

customers to gather their thoughts on the market before and during the season. This distributor went on to talk about how their own experience working as a distributor for many years allowes them to sense changes in the market as the season progresses, sometimes through as little as a phone call from someone who has been out of contact for a bit of time.

> *Before I start a season, I start calling people and I say, 'What are you hearing? What do you know? What's the price? What do you think you want?' I'll call my customers on the East Coast and ask them the same question, 'What regions are in production? What are you getting? How's the quality?' … pre-season, and during the season, you call around and you're collecting information from your customers … And then you get … kind of a gut feel... We finished this production yesterday, and I could tell last week that the marketplace was getting tight. And what I mean by that, when I say tight, is supplies were becoming less available. So I start[ed] being careful… Last Monday, I didn't want to take orders for last weekend, for Friday, because I could feel that the market was changing. And it's just a gut feeling. It's based on things like … just the goofiest little things. You get people that you haven't heard from for a month that start calling you, 'Hey, you got any peppers next week? What's going on?' You know? That's always a first alert, so to speak. You start to pay attention to little things. … Doing it for years, you get a feel for what's going on.*
> *(Mid-sized produce distributor, Interview 24)*

This distributor is describing very nuanced information specific to their products that they are collecting themselves through relationships they have with other people in the marketplace and their customers. They later describe these relationships, coupled with their own market experience, as a faster and more accurate source of price and volume information than AMS Market News or other USDA data. Their experience working with their products allows them to interpret the information they gather themselves through their market relationships clearly enough to make pricing and market discussions and manage their operation successfully.

We also heard some interviewees, especially distributors, processors, and retailers, talk about aggregated data platforms. SPINS was the one platform that retailers consistently mentioned; several of our retailer interviewees use SPINS regularly. One retailer described the platform as one where retailers share their data and can look at aggregate data and trends, by different geographic areas, for all participating retailers.

> *My company is a member of SPINS. And not every retailer is a member of these, but many retailers are, and your information goes into their database and gets aggregated with all of the retailers. And what you can do as a retailer then is you can look and examine for… only for consumer packaged goods by the way. You can look and examine to see, like what is Kettle sea salt potato chips selling for in Northern California independent retailers. Or you can look and see what is nationally Kettle sea salt potato chips, what is the average across all of these retailers that this information is aggregating up from. You can look and see what is the national price this week on Kettle potato chips or for the last 13 weeks or the last 52 weeks or whatever.*
> *(Small grocery retailer, Interview 4)*

This retailer notes the flexibility of these data to look at different geographic areas (Northern California vs. national) and retailer types (independent retailers vs. all retailers). This flexibility is something this interviewee highlighted when explaining the data source and how they used it regularly.

We also heard about a handful of other aggregate data sources from distributors and processors. These sources are geared towards the product or type of product that the distributor worked with, and often include more than raw pricing and volume information. For example, a distributor of organic spices discusses their use of data from an association they are part of in determining fair pricing and connecting with growers and processors.

> *And we're also members of ASTA, which is the American Spice Trade Association. That enables us to have access to things like crop reports and also more inside information from the suppliers that help us gauge what's fair pricing. (Mid-sized spice distributor, Interview 6)*

They went on to describe a complex web of factors that could impact pricing and sourcing of their products. The detailed and tailored information that this trade association is able to provide seems to fill a need for the company that went beyond the raw data. Other distributors mentioned using aggregated data sources tailored to their products as part of their market information: a tree fruit distributor uses reports from the main grower's organization for their tree fruit (Interview 22), and a produce distributor reviews the Organic Produce Network newsletter and market update (Interview 24).

A few other distributors and processors shared knowledge of databases available in the marketplace, even some using data from USDA, but describe it as not currently useful for their own business. For example, one distributor uses data from wholesalers, from a growers' organization, and sometimes directly from the USDA, but they describe other paid data platforms available in the market now that use USDA's data and improve their usability for a price.

> *There's maybe three or four different companies that are selling subscriptions, essentially to the USDA data. ... It's obviously free, but they've created a portal where they manipulate the data into graphs. If you're unable to use Excel for whatever reason, then they will compile it for you. And we've never purchased one of those but I know they're popular with other companies. (Smaller tree fruit distributor, Interview 22)*

While this is not a resource they use, they describe it as common in the industry, especially among companies with limited capacities for in-house data exploration or analysis. Here the benefit of these databases as compared to AMS Market News is primarily improved presentation and usability of the data. Our interview participants describe these aggregate databases as readily available in the marketplace, but more often describe relying on conversations with associates or comparing local prices to gain market information about their products.

AMS Market News Knowledge and Use

To more thoroughly understand what stakeholders in California's agrifood industry know about AMS Market News, we asked specifically about their familiarity with, use of, and satisfaction

with AMS Market News organic price and volume data. To summarize, other than those already using organic data from AMS Market News, familiarity with this data source is low. Among those who used AMS Market News organic data, it most commonly informs organizations' evaluation of market conditions and price fairness. It also has some impact on purchasing and harvesting decisions, as well as planning for the future of the business. An importance-satisfaction analysis of our survey respondents' ranking of different aspects of organic price and volume data reveales three areas where AMS Market News organic data may be falling short: data accuracy, availability, and, for producers, products covered by the data.

As outlined in the previous section of this report, use of AMS Market News organic data was limited among our survey respondents, with fourteen producers (9%), five distributors (19%), six processors (18%), and only one retailer (7%) using the data regularly (Table 4.1). Familiarity with the data, however, was also low (Table 5.1). In our survey, we asked the following question to all participants who did not already identify AMS Market News organic data as a source they regularly used: "In general, how familiar are you with USDA Agricultural Marketing Service (AMS) Market News agricultural data?" We followed this question with one specific to the organic data for survey participants who reported at least some familiarity with AMS Market News. We asked, "How familiar are you with the organic agriculture price and volume data available through AMS Market News?" Both questions had response options along a 5-point scale of familiarity[9]. Because familiarity questions were only asked to survey respondents that did not already report using AMS Market News organic data, rates of familiarity outlined in Table 5.1 represent familiarity and non-use of AMS Market News organic data. As shown in Table 5.1, familiarity is lowest among producers; 62% of producers do not use organic data from AMS Market News and are not familiar with the data source at all. Only 12% of our sample are slightly or moderately familiar with AMS Market News organic data but do not use them. Retailers are less familiar with AMS Market News than are respondents in other market segments. Half of retailers do not use organic data from AMS Market News and are not at all familiar with the source. Only 21% of retailers are at least slightly familiar[10] with AMS Market News organic data but do not use these data. Thirty-five percent of processors do not use these data and are not at all familiar with AMS Market News, and about 18% have at least some familiarity with AMS Market News organic data but do not use them. Familiarity was highest among distributors, where only 22% do not use these data and are not familiar with AMS Market News at all, and about 26% have at least some familiarity with AMS Market News organic data but do not use them.

[9] The scale included response options "Not familiar at all," "Slightly familiar," "Moderately familiar," "Very familiar," and "Extremely familiar."
[10] This percentage includes those who reported they were slightly familiar, moderately familiar, very familiar, or extremely familiar.

Table 5.1 – Familiarity with AMS Market News by Market Segment

	Farmers			Distributors			Processors			Retailers		
	n	% R[a] (N=152)	% NU[b] (n=136)	n	% R[a] (N=27)	% NU[b] (n=22)	n	% R[a] (N=34)	% NU[b] (n=29)	n	% R[a] (N=14)	% NU[b] (n=13)
AMS Market News												
Not familiar at all	94	62%	69%	6	22%	27%	12	35%	41%	7	50%	54%
Slightly familiar	21	14%	15%	5	19%	23%	4	12%	14%	3	21%	23%
Moderately familiar	9	6%	7%	1	4%	5%	3	9%	10%	1	7%	8%
Very familiar	5	3%	4%	4	15%	18%	1	3%	3%	1	7%	8%
Extremely familiar	0	0	0	0	0	0	0	0	0	0	0	0
AMS Market News organic data												
Not familiar at all	17	11%	13%	3	11%	14%	2	6%	7%	2	14%	15%
Slightly familiar	12	8%	9%	4	15%	18%	2	6%	7%	2	14%	15%
Moderately familiar	6	4%	4%	1	4%	5%	3	9%	10%	1	7%	8%
Very familiar	0	0	0	2	7%	9%	1	3%	3%	0	0	0
Extremely familiar	0	0	0	0	0	0	0	0	0	0	0	0

Source: Organic Data Initiative Gap Analysis Surveys (2024)

[a] This column represented the percentage of all survey respondents (R) who chose each response option.

[b] This column represents the percentage of all survey respondents who were non-users (NU) of AMS Market News organic data who chose each response option.

We also asked regular users and those familiar with AMS Market News organic data a series of closed-ended questions about the purposes for which they used these data. Common choices were focused on longer-term market research, like evaluating market conditions or determining if a price is fair, or business decisions other than setting their own prices, like making purchasing decisions and planning for the future of the business. We asked those at least somewhat familiar with the data, "Of the following, which business functions are informed most by Market News organic price and volume data within your [market segment] operation?" and we asked those using the data "What aspects of your business are impacted by data from USDA Agricultural Marketing Service (AMS) Market News Organic Price and Volume Data?" For each question, respondents could choose up to three response options; the same response options were given for both questions. Responses are summarized in Table 5.2. Most consistent across market segments is the use of AMS Market News organic data for "Evaluating market conditions, identifying market trends, and/or monitoring price patterns." Of the 32 producers who use or are at least somewhat familiar with AMS Market News organic data, 44% used it to evaluate market conditions (this made up 9% of all producer survey respondents). Of the 12 distributors who use or are familiar with AMS Market News organic data, 25% use it to evaluate market conditions (this made up 11% of all distributor survey respondents). Of the 11 processors who use or are familiar with the data, 45% use it to evaluate market conditions (15% of all processor survey respondents). And of the 4 retailers who use or are familiar with the data, 50% use it to evaluate market conditions (14% of all retailer survey respondents). Thirty-eight percent of producers and 25% of distributors who use or are familiar with AMS Market News organic data (8% of all producers and 11% of all distributors) also reported using the data for "Determining if we're receiving a fair price for organic products." Thirty-six percent of processors who use or are familiar with AMS Market News organic data (12% of all processors) use the data for "Making

purchasing decisions," and 25% of distributors who use or are familiar with the data (11% of all distributors) use them for "Planning for the future of our business." The rest of the response options, including "Setting prices for organic products," are not often impacted by AMS Market news data for many of our survey respondents.

Table 5.2 – Business Functions Informed by AMS Market News by Market Segment

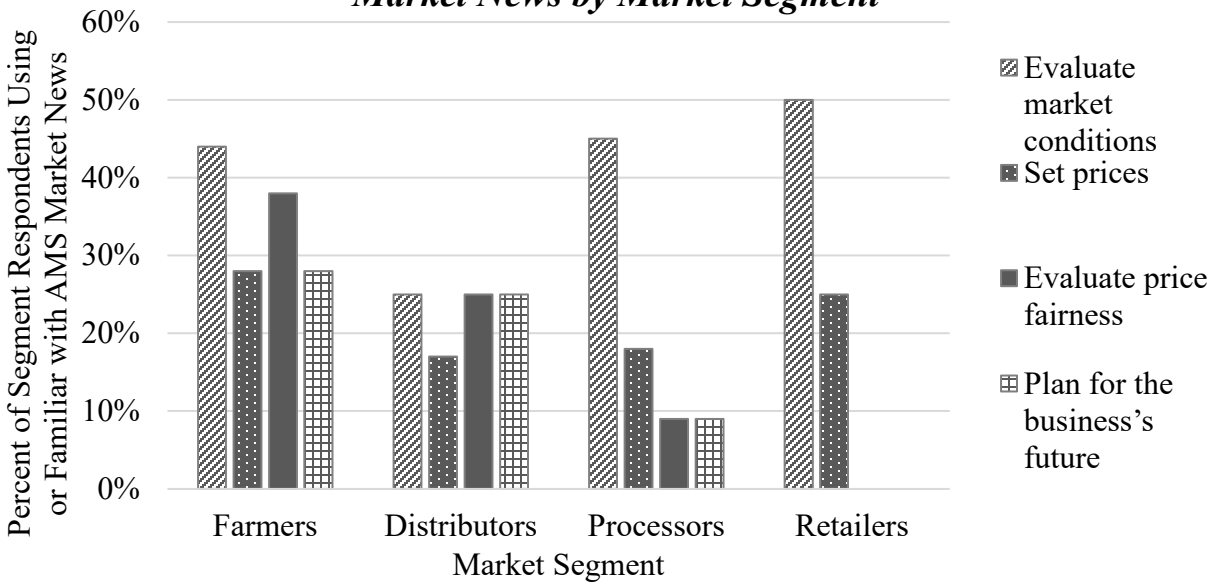
	Farmers			Distributors			Processors			Retailers		
	n	% R[a] (N=152)	% UF[b] (n=32)	n	% R[a] (N=27)	% UF[b] (n=12)	n	% R[a] (N=34)	% UF[b] (n=11)	n	% R[a] (N=14)	% UF[b] (n=4)
Evaluate market conditions	14	9%	44%	3	11%	25%	5	15%	45%	2	14%	50%
Set prices	9	6%	28%	2	7%	17%	2	6%	18%	1	7%	25%
Evaluate price fairness	12	8%	38%	3	11%	25%	1	3%	9%	0	0	0
Make purchasing/harvesting decisions	5	3%	16%	2	7%	17%	4	12%	36%	0	0	0
Adjust production/purchasing volumes	5	3%	16%	1	4%	8%	1	3%	9%	0	0	0
Evaluate equipment needs	0	0	0	0	0	0	0	0	0	0	0	0
Assess movement of organic products	3	2%	9%	0	0	0	1	3%	9%	1	7%	25%
Plan for the business's future	9	6%	28%	3	11%	25%	1	3%	9%	1	7%	25%
Make advertising decisions	n/a	n/a	n/a	0	0	0	0	0	0	0	0	0
Make other business decisions	5	3%	16%	0	0	0	0	0	0	1	7%	25%

Source: Organic Data Initiative Gap Analysis Surveys (2024)

[a] This column represented the percentage of all survey respondents (R) who chose each response option.

[b] This column represents the percentage of all survey respondents who were users of and/or familiar with (UF) AMS Market News organic data who chose each response option.

Figure 5.1 - Main Business Functions Informed by AMS Market News by Market Segment



Source: Organic Data Initiative Gap Analysis Surveys (2024)

Our questions about satisfaction with AMS Market News organic price and volume data and importance of aspects of an ideal organic price and volume data source center around eight

different aspects of data. These aspects were modeled after those described by Home et al. (2017) and incorporated factors we identified as potential points of dissatisfaction for California organic agrifood stakeholders in our own brief review of AMS Market News organic data. These aspects were availability, articulated on our survey as "The data are available and/or updated as often as we need," products covered ("The data cover the right products"), geographies covered ("The data cover the right geographic area(s)"), accessibility ("The data are easy to access"), accuracy ("The data are accurate"), interpretability ("The data are easy to understand and interpret"), usability ("We are able to use the data the way we want to"), and works well with automation ("The data work well with automated reports we use or want to use"). We asked those who use or are familiar with AMS Market News organic data, "How satisfied are you with each of the following aspects of AMS Market News organic price and volume data?" using a 5-point scale as response options for each of the data aspects described above[11]. We also asked all of our survey respondents, "How important to your [segment] operation are each of the following aspects of organic price and volume data?", using a the following response options for each of the data aspects described above: "Not at all important," "Of minor importance," "Moderately important," "Important BUT NOT essential for using the data," and "Important AND essential for using the data."

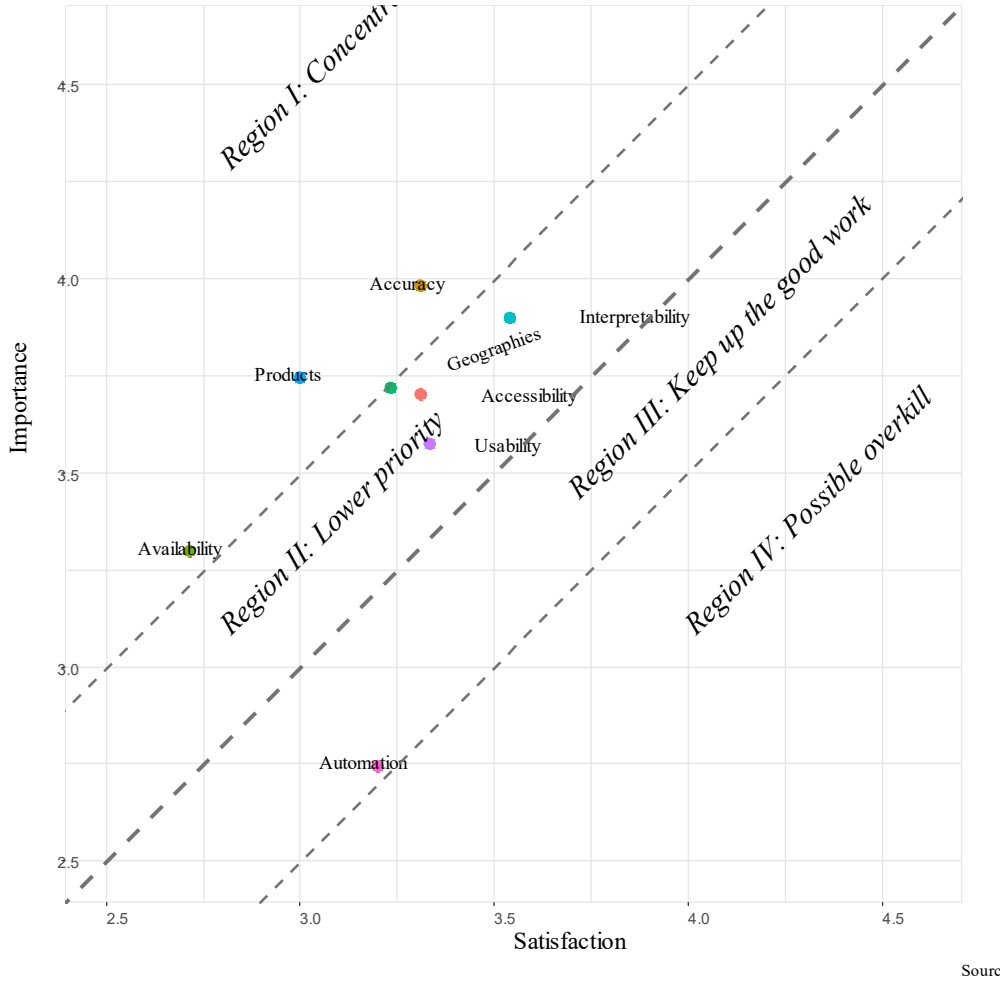
With survey results from these two questions, we conducted an importance-satisfaction analysis (Galt et al., 2019) that helped identify three specific areas where AMS Market News may not be meeting the needs of those using and/or familiar with the data source: accuracy, availability, and, for producers, products covered. For this method, we compared the average ratings of satisfaction with aspects of AMS Market News organic data and the average ratings of importance of aspects of an ideal data source for each market segment. Following Galt et al.'s (2019) method, we then graphed importance (y-axis) against satisfaction (x-axis) to highlight areas where average importance scores were disproportionately higher than average satisfaction scores. The following figures present these separate graphs for producers (Figure 5.2), distributors (Figure 5.3), processors (Figure 5.4), and retailers (Figure 5.5)[12]. Each graph also contains demarcations of four separate areas of attention. Region I represents the area where most concentration should be focused; items in this area had average importance ratings at least a half point higher than their satisfaction rating. Items in Region II also have higher average importance ratings than average satisfaction ratings, but are less pressing to address; the average scores are within a half point of each other. Items in Region III have lower average importance scores than average satisfaction scores, so represent areas where AMS Market News is meeting

[11] The scale included response options "Unsatisfied," "Somewhat unsatisfied," "Neutral / mixed feelings," "Somewhat satisfied," and "Satisfied."

[12] These figures are uniquely useful for assessing areas where AMS Market News organic data could be improved for California organic agriculture stakeholders. However, they should be interpreted with some caution because our response rates for the questions about satisfaction with AMS Market News were quite low. This was because we only asked these satisfaction questions to survey responds who reported regularly using or at least some familiarity with AMS Market News organic data (9% of producer survey respondents answered these questions, as did 26% of distributors, 15% of processors, and 21% of retailers). Questions about importance of data aspects were asked to all survey respondents and had much higher response rates (82% of producer survey respondents answered these questions, as did 67% of distributors, 68% of processors, and 86% of retailers).

users' needs fairly well; average scores are also within a half point of each other in this region. Lastly, Region IV represents the area where less attention can be focused; average satisfaction for items in this area is higher than average importance scores by at least a half point, suggesting these items are already being more than adequately addressed.

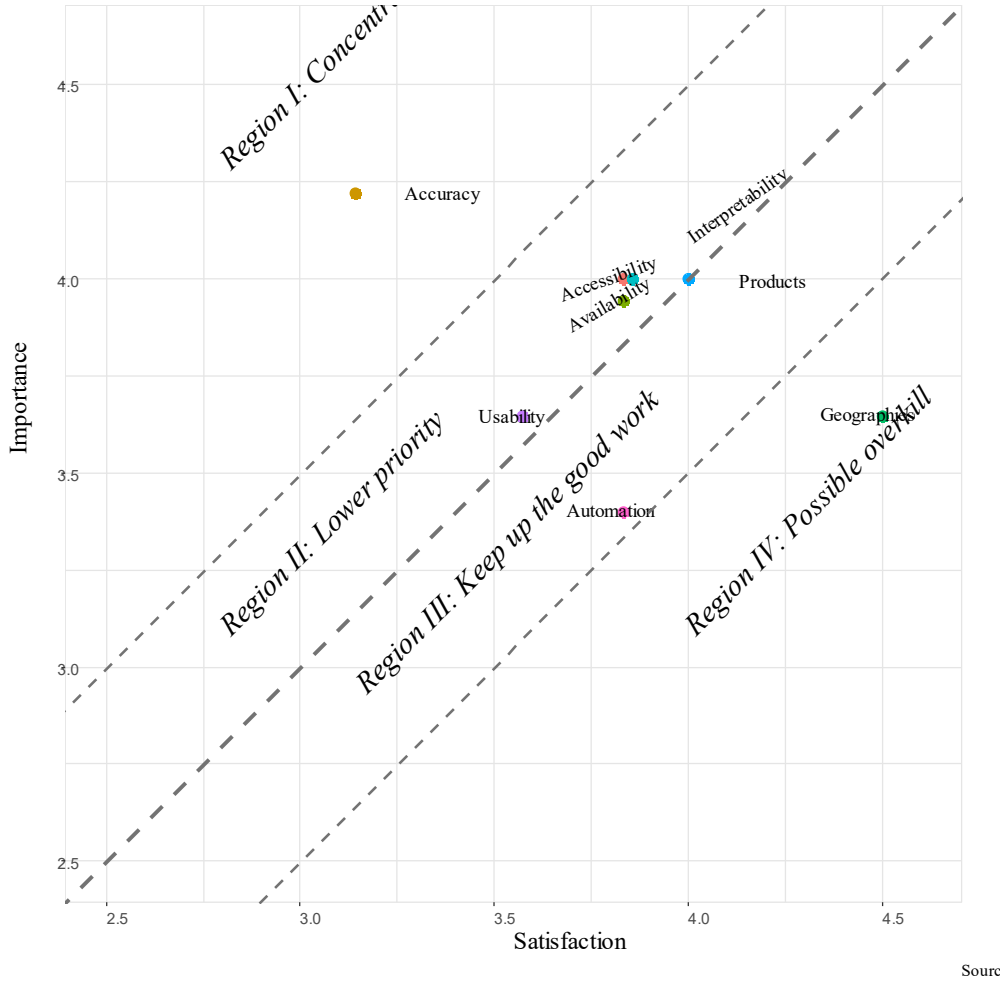
Figure 5.2 - Producers' Average Importance and Satisfaction Ratings



Overall, producers have the lowest average satisfaction scores of all market segments (Figures 5.2 through 5.5). Producers have three data aspects with substantially higher average importance ratings than average satisfaction ratings: data accuracy, products covered, and data availability (Figure 5.2). These data aspects all fall within Region I on the figure, indicating they are most important to focus on to address the needs of producer stakeholders. The average importance

score[13] for data accuracy is 3.98 among producers, but the average satisfaction score[14] for data accuracy of AMS Market News organic data is only 3.31 among producers (a gap of about a third of a point). The average importance score for products covered is 3.74 for producers, but the average satisfaction score for products covered in AMS Market News organic data is only 3.00 for producers (a gap of nearly three-quarters of a point). The average importance score for data availability is 3.3 for producers, but the satisfaction score for data availability of AMS Market News organic data is only 2.71 for producers (a gap of about .6 points).

Figure 5.3 - Distributors' Average Importance and Satisfaction Ratings



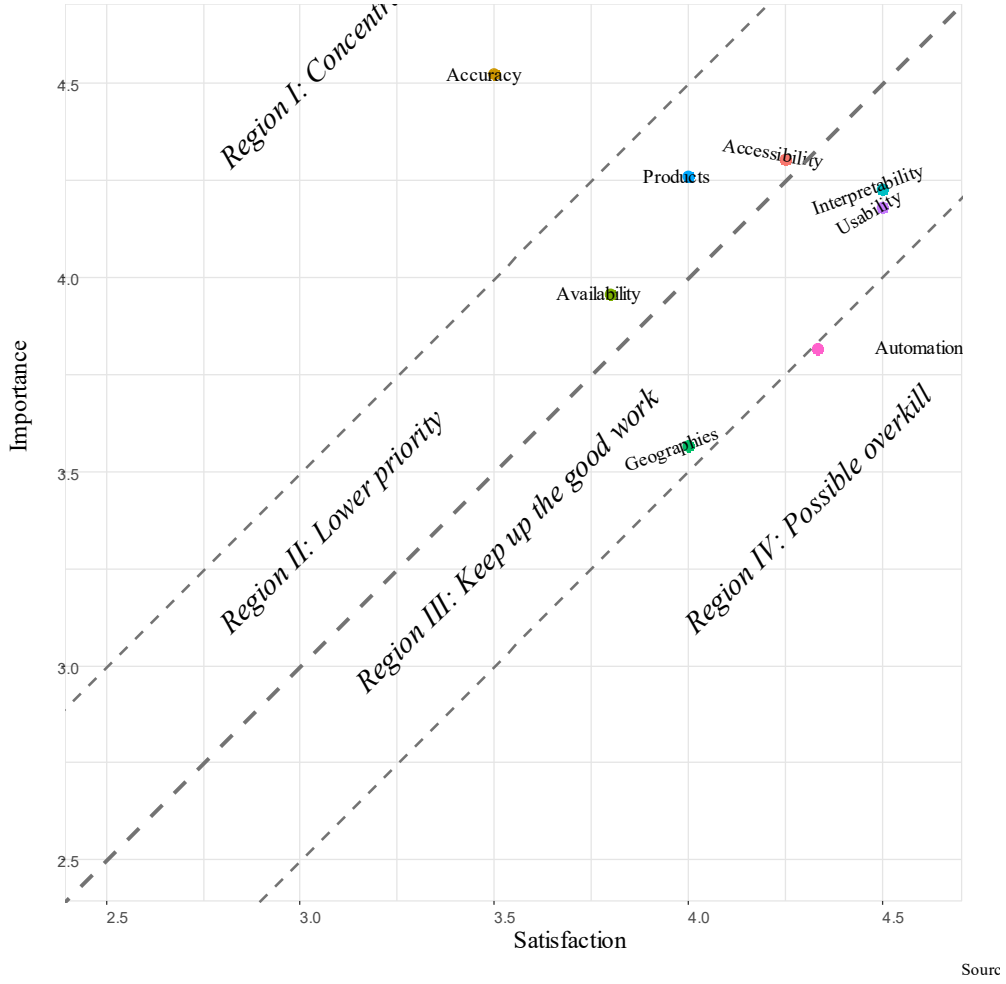
Accuracy also fell in Region I for distributors on Figure 5.3 and processors on Figure 5.4. The average importance score for data accuracy is 4.22 for distributors, but the average satisfaction

[13] This is the average of all importance scores from producers on a 5-point scale of importance rankings where the category "Not at all important" was treated as a 1 and the category "Important AND essential for using the data" was treated as a five. Therefore, average importance scores/ratings range from 1-5, with higher numbers representing more importance.

[14] This is the average of all satisfaction scores from producers on a 5-point scale of satisfaction rankings where the category "Unsatisfied" was treated as a 1 and the category "Satisfied" was treated as a five. Therefore, average satisfaction scores/ratings range from 1-5, with higher numbers representing more satisfaction.

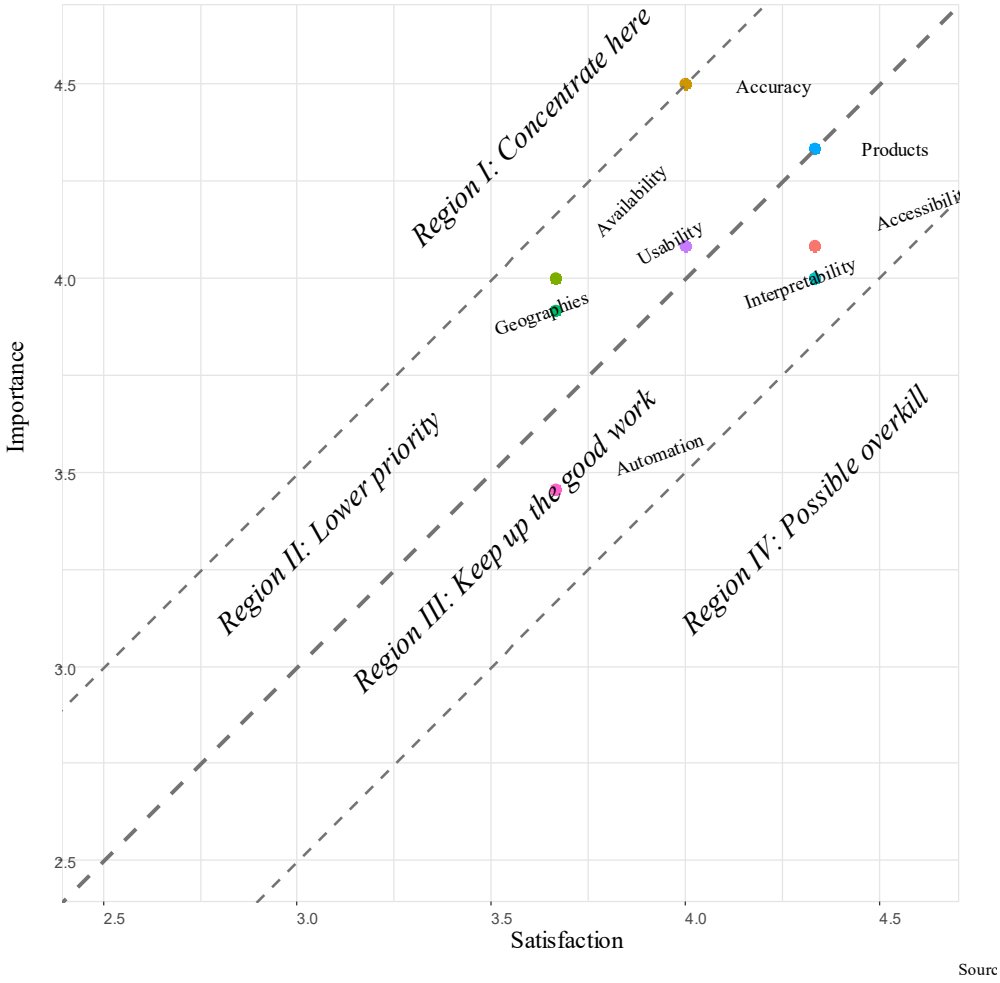
score for accuracy of AMS Market News organic data is only 3.14 among distributors (a gap of more than one entire point). The average importance score for data accuracy is 4.52 for processors, but the average satisfaction score for accuracy of AMS Market News organic data is only 3.5 among processors (also a gap of more than one entire point). While availability does not fall in Region I for either distributors (Figure 5.3) or processors (Figure 5.4), it does fall in Region II for both groups, indicating it as a lower-priority focus for improving use of AMS Market News organic data. And products covered is not a focus priority for distributors but does also appear as a lower-priority focus for processors (Figure 5.4).

Figure 5.4 - Processors' Average Importance and Satisfaction Ratings



Retailers are most satisfied with AMS Market News organic data as compared to their average importance score. No data aspects fall in Region I for retailers, but data accuracy, and data availability do fall in Region II for retailers (Figure 5.5), indicating their lower importance to focus on for retailer stakeholders.

Figure 5.5 - Retailers' Average Importance and Satisfaction Ratings



This importance-satisfaction-analysis identifies data accuracy as the most important aspect of AMS Market News organic data to focus on improving for California organic agrifood industry stakeholders. Data accuracy falls in the high priority region to address for producers, distributors, and processors, and in the lower priority region for retailers. Availability may also be a good aspect of AMS Market News organic data to focus on. Data availability falls in the priority region for producers and in the lower priority region for distributors, processors, and retailers. And products covered may be important to address for producers, among whom this data aspect falls in the priority category to address, and processors, among whom it falls in the lower priority category.

This importance-satisfaction analysis also indicates that our research respondents are happy with their current ability to use AMS Market News organic data in their automated processes. This item consistently has higher average satisfaction scores than average importance scores, falls in Region III for producers, distributors, and retailers, and falls in Region IV for processors. Automation appears to be the aspect of AMS Market News organic data that is best meeting the data needs of our research respondents.

Interview data specific to AMS Market News organic data shows similar findings to the survey data. For the most part, interview participants do not regularly use AMS Market News organic price and volume data, and many are not familiar with this data source. Only four of our interviewees describe using organic price and volume data from the USDA. These interviewees talk about their desires to track longer-term trends in the data but focus more on the data limitations for organic products. Another ten interview participants are familiar with organic price and volume data from USDA but do not use it because of its limitations. Overall users and non-users familiar with organic price and volume data available through USDA describe similar data limitations: inaccuracies and/or gaps in the data, the data interface on AMS Market News website is difficult to work with, and/or the data do not include organic products or geographies specific to their operation.

Interviewees familiar with AMS Market News organic data primarily use it for long-term price trend tracking but spent more time talking about the limitations of this data source in our interviews. For example, this stakeholder uses AMS Market News organic data to track and share longer-term price trends, but pointes out some notable limitations that they would like to see addressed. They came to the interview with an excel spreadsheet with some figures to illustrate the following point they wanted to make.

> *This is something that I took out of the USDA website because I needed to make a report for some of the investors we have on the [specific variety] orchards. And this here {referring to the spreadsheet and figures} is what I mainly needed to show them, is that the [specific variety] pricing is always higher than what... These are called the core varieties, [several main varieties], so it's always higher. But look at this. They just didn't collect data for these two months {referring to two months where the figures showed no data for organic}. ... And this kind of stuff is rampant in the USDA website. How can this be useful if, all of a sudden... and this is our peak season right here {referring to the months for which data was missing}. So I had to tell the investors like, 'yeah, I guess it would be a nice little mountain here where we'd have better pricing, but I don't really know.' For whoever at the USDA decided not to get store pricing that day. So that is my main grievance. I also just think it's pretty clunky that I have to drop it out of the website into excel in order to do anything. It's inconsistent ... by region. Sometimes they collect data for a particular region on a particular month and then the next month they don't. So I don't know how that works, but I think it's not very helpful.*
> *(Tree fruit grower-shipper, Interview 22)*

This distributor and producer showed a spreadsheet with a line graph that tracked the price of one specific tree fruit variety as compared to others over twelve months. Datapoints for two of the months, as they explain in the quote above, are simply missing from the USDA data for that variety. They explain the impact of this through highlighting that the missing months are at the peak of the season for that variety where they were growing it and that they had to guess for investors at what the pricing might look like for those months. This explanation suggests that the utility of AMS Market News organic data for businesses wanting to look at longer-term trends is limited by these gaps. This distributor also mentions that this kind of gap in the data is common

for organic commodities in AMS Market News and that this makes the data substantially less usable, even for tracking longer-term trends. They also echo sentiments from other interviewees that the interface is "clunky," requiring them to copy the data to Excel to make the illustrations they need.

Another produce distributor mentioned USDA data being useful for research but mostly using price lists from their own customers and other vendors instead of data from USDA. They describe USDA data as cumbersome to access and as having gaps that make it difficult to use.

> *In real time, the USDA system isn't the best because it's just cumbersome and there's a lag in their pricing to a certain degree.... In recent times, I haven't utilized it that much, particularly in real time.... because we work in the organic portion of that industry... that's the other part, USDA's data on organics is spotty. Conventional is decent but, that's just how the market is in that organic is not always available and so there's gaps, and I imagine there's reporting gaps as well. We utilize other customers', other vendors' price lists, as well as just talking to people through the industry and monitoring markets. And then in a bigger picture or in a research perspective is when I go to the USDA database, currently. (Mid-sized produce distributor, Interview 23)*

The difficult interface and the lag in pricing information are mentioned first by this distributor, suggesting that these are the main factors keeping them from using USDA data to make pricing decisions. They describe using more informal data sources like price lists and conversations with other industry actors to make their pricing decisions instead. They also mention that, while the conventional USDA data are better, certain things about the organic agriculture market itself make those data more difficult to collect, like organic options not always being available. They close by mentioning their use of USDA data for longer-term trends or market research. So even with these data gaps and issues with the interface, this distributor sees USDA as a good source for the kind of information that might impact longer-term business decisions.

While the need for more organic products to be covered by AMS Market News was only discussed at length by two of our interviewees, we include the examples here to help illustrate our survey finding that products covered is an aspect of AMS Market News organic data that lacks satisfaction among organic producers. This mid-sized vegetable producer feels confident that AMS Market News is not useful for their operation, which sells their produce through non-wholesale channels like farmers markets and to restaurants. When asked about what barriers they encountered when trying to access organic price and volume data, they responded that they do not even look for this type of data and expresses a lack of confidence that they would be able to find it and/or that it would meet their needs.

> *I don't really go looking for it because I don't know where I would find it. Whenever I've looked at the sort of official, USDA or whatever it is, it's always sort of commodity stuff, you know? Whereas we've got restauranty things. So they don't list prices for the kinds of things that we sell {like pointed cabbage}. (Mid-sized vegetable producer, Interview 17)*

They differentiate their products from commodity produce and note that this difference makes USDA data largely unusable for them. The products they grow and sell are largely not listed in

the USDA data. And this proved largely true a little later in the interview when this producer spent some time reviewing AMS Market News reports and narrating some of the issues they found as they reviewed the reports. Mainly, data for the specific varieties of specialty crops they grow are not available. But their narration of their experience also indicates other aspects of the data that are not useful for them or are confusing. Here is an example from this narrative process that took place over about five minutes.

> *Interviewee: We grow pointed cabbage. So this is Atlanta, Atlanta, Atlanta, I guess it's alphabetical so... Page two... San Francisco, here we go! And then the most recent date they have is the 10th of January.{The interview took place in late April}*
> *Interviewer: So not recent enough to be useful for you.*
> *Interviewee: No, no. And then it doesn't specify which cabbage. Oh, sorry. Variety. Round green, round green, round green, red, red, red, savoy. Woopy. So we do grow the savoy. And then it gives you low and high price. There's not much difference. It doesn't tell you the weight. Oh, no it does, sorry. Thirty pounds. And then a Danish cabbage, whatever that is. I don't know. But our [pointed] cabbage isn't there. (Mid-sized vegetable producer, Interview 17)*

While data for cabbage are available, these do not include the main variety of cabbage that they grow, pointed cabbage. But what this narration also shows is the cognitive load it takes for this producer to navigate the data that are available. First, it is not clear how they find the geographic area they are looking for until they deduce from the data that they are in alphabetical order. Then it is not immediately clear to them that there are variety information included in the data at all, though they do find this information. Similarly, information on weight is not immediately clear to them, but they do find it. After a not very intuitive search that takes several minutes for this producer, they ultimately conclude that their variety of cabbage is not included and the data are therefore not useful for them. This narrative highlights some of the points of dissatisfaction in using the AMS Market News organic data that are available. The data organization is not intuitive and product sizes are specific to commodity markets rather than what might be found in a non-wholesale sales channel like many of the smaller producers work in.

Another interview respondent, a beef processor and producer, talked about using the USDA reports on conventional live cattle because they are not aware of much data specific to the regenerative/organic beef they produce and process. In this quote, they also describe the data they would like to have on regenerative/organic beef and what they would use them for within their own business.

> *Right now I can look at retail values and then wholesale values from those reports they give out. I use USDA reports on live cattle, you know, five area weighted average and some of those things. There's not a whole lot they're doing right now in the regenerative slash organic space that's useful, especially in a regenerative space because it's so new it's still trying to be defined. As that production model continues to expand, having some price points in that market space is going to be extremely helpful. Especially to understand my trajectory and growth and some of those things. Am I in the market, am I not, am I too high, am I too low, and those things. Understanding what that market really is, from two standpoints. One, a pricing standpoint, and then two, from a volume standpoint, so I can start tracking*

> *… is this movement really starting to grow, especially in the retail side, is there really a lot of consumer demand for it, and trying to trend some of those growth patterns [are going to] be really important.*
> *(Beef grower-processor, Interview 2)*

This producer would like regenerative/organic beef pricing and volume and talks about using this information to track their own business trajectory, including identifying areas of market growth and determining whether they are competitive in that market. They also mention wanting information about consumer demand to help understand growth patterns in the market. Clearly the interest here is to use USDA data on regenerative/organic beef to help make longer-term business decisions, such as whether and how much to grow their business and in what ways. Later within this same explanation, they also note the importance of having more geographically granular data available.

> *And then that data being placed on a geographic region. You know, I currently use five-area weighted average price points for some of those for live cattle. We can condense that even further down to even West Coast, or even P[acific] and W[est] or some of those things that would be pretty decisive on those numbers would be extremely helpful.*
> *(Beef grower-processor, Interview 2)*

This interest in data specific to a smaller geographic region was reflected in other interviews as well, but here the explanation is specific in terms of what geographic level would be more useful. They note that having data specific to the West Coast or the Pacific and West regions would be "extremely helpful." This example illustrates the call for more geographic specificity among our interview participants. A lack of geographic specificity, along with reporting gaps and a complicated interface, are consistent limitations to using AMS Market News organic data among our interviewees, even though some use it to track longer-term trends for the prices of their products.

Current Data Collection Gaps

In this section, we review our research findings as they relate to our second research question, "What are the unfilled needs (gaps) in current offerings from both AMS Market News and other data sources?" To summarize, our findings suggest some specific limitations of AMS Market News organic data with regard to data accuracy and consistency, geographies and products covered, and presentation and dissemination. Our respondents are concerned about reporting gaps in AMS Market News organic data, want more California-specific organic data on a wide range of products (especially citrus, nuts, grapes, stone fruit, olives, avocados, tomatoes, livestock, poultry, and dairy), and show limited understanding of what organic data is currently available through AMS Market News. Ideally, research respondents want visual presentations of individual data points that include at least some explanation and have regular updates delivered via email and accessible on a website.

Our survey included questions about what an ideal organic price and volume data source would look like. Overall, survey respondents' ideal data source is a standardized or interactive visual format with individual data points and some explanation. More specifically, we asked separately about the preferred data format and level of detail. First, we asked, "What data format do you prefer?" and allowed respondents to choose up to three from the list shown in Table 6.1 for "Preferred format". For producers, distributors, and processors, the clear primary choice is "Standardized/Static visual format (like reports or figures),"[15] selected by about 70% of producers and nearly 60% of distributors and processors. Distributors and processors are also interested in an "Interactive visual format (like live dashboards)," with 30% of distributors and 24% of processors selecting this option. For retailers, the preference is evenly split between static and interactive visual formats; 57% of retailers choose each of these options. These results suggest that visual data presentations, especially those that are standardized, are preferred for most of our survey respondents, but interactive visualizations are a consistent second choice. However, given the specificity of data preferences that people expressed in our interviews, it is possible that the interactive data visualizations will be more useful for stakeholders in the long run. It is possible these survey data show lower interest in these because interactive data visualizations are still a relatively new data presentation format that some survey respondents may be unfamiliar with.

[15] The questions and response options were truncated in Table 6.1 as compared to what we included in the survey. Full responses options as they appeared on the survey are included in the text here.

Table 6.1 – Ideal Organic Price and Volume Data Attributes by Market Segment

	Farmers (N=152)	Distributors (N=27)	Processors (N=34)	Retailers (N=14)
Preferred format				
Standardized/Static audio	8 (5%)	2 (7%)	0	0
Standardized/Static visual	105 (69%)	16 (59%)	19 (56%)	8 (57%)
Standardized/Static audio/visual	21 (14%)	4 (15%)	2 (6%)	3 (21%)
Interactive audio	9 (6%)	1 (4%)	1 (3%)	3 (21%)
Interactive visual	26 (17%)	8 (30%)	8 (24%)	8 (57%)
Interactive audio/visual	17 (11%)	4 (15%)	1 (3%)	3 (21%)
Preferred level of detail				
Individual data points	59 (39%)	10 (37%)	12 (35%)	6 (43%)
Individual data points w/ explanation	42 (28%)	11 (41%)	12 (35%)	8 (57%)
Summary data	48 (32%)	7 (26%)	11 (32%)	7 (50%)
Summary data w/ explanation	38 (25%)	9 (33%)	11 (32%)	7 (50%)
Preferred frequency				
Daily	6 (4%)	0	1 (3%)	2 (14%)
Weekly	37 (24%)	12 (44%)	5 (15%)	3 (21%)
Monthly	29 (19%)	5 (19%)	5 (15%)	4 (29%)
Quarterly	15 (10%)	0	8 (24%)	3 (21%)
Seasonally	22 (14%)	0	0	0
Yearly	13 (9%)	1 (4%)	4 (12%)	0
Preferred access				
Email	98 (64%)	16 (59%)	19 (56%)	9 (64%)
Website	59 (39%)	11 (41%)	15 (44%)	8 (57%)
Smartphone app	30 (20%)	2 (7%)	4 (12%)	2 (14%)
Printed materials	27 (18%)	3 (11%)	2 (6%)	4 (29%)
Automated data updates	7 (5%)	2 (7%)	1 (3%)	3 (21%)
Other	16 (11%)	2 (7%)	6 (18%)	2 (14%)
Most useful product categories				
Major specialty crops	45 (30%)	9 (33%)	11 (32%)	7 (50%)
Major grain crops	11 (7%)	3 (11%)	8 (24%)	3 (21%)
Other crops	24 (16%)	4 (15%)	3 (9%)	3 (21%)
Livestock &/or poultry	7 (5%)	3 (11%)	5 (15%)	8 (57%)
Dairy &/or eggs	14 (9%)	1 (4%)	4 (12%)	8 (57%)
Value-added specialty crop products	22 (14%)	4 (15%)	5 (15%)	2 (14%)
Value-added grain products	8 (5%)	2 (7%)	7 (21%)	2 (14%)
Value-added livestock products	4 (3%)	1 (4%)	5 (15%)	3 (21%)
Value-added dairy/egg products	8 (5%)	1 (4%)	2 (6%)	4 (29%)
Other value-added products	6 (4%)	3 (11%)	4 (12%)	2 (14%)

Source: Organic Data Initiative Gap Analysis Surveys (2024)

We followed this question up with one asking about "which level of detail would you prefer the data to have?" and allowing respondents to choose all options they felt applied. As is shown under "Preferred level of detail" in Table 6.1, the preferences for levels of detail are much less clear, suggesting that respondents may find value in each detail level. Slightly more producers chose "Individual data points (like the price of a commodity at a specific time/place)" than all other options, while slightly more distributors and retailers chose "Individual data points with some explanation" than other options. The top choice for processors is evenly split between individual data points and "Individual data points with some explanation," but all options were chosen at nearly the same rate.

Our survey respondents also want weekly to quarterly updates delivered via email and accessible on a website. To measure "Preferred frequency" as shown in Table 6.1, we asked survey respondents "How frequently would your [organization] benefit from updates to organic price and volume data?" with response options ranging from "Daily" to "Less often than yearly."[16] This was a forced choice question, meaning that we did not allow respondents to choose more than one response. The most common response for producers and distributors is "Weekly"; 24% of famers and 44% of distributors chose this option. More processors (24%) chose "Quarterly" than any other timeframe. And more retailers (29%) chose "Monthly" than any other timeframe. Interestingly, very few respondents from any market segment are interested in receiving this data daily. This suggests that, rather than using these data to make individual, day-to-day pricing decisions within their business, stakeholders may be more interested in using these data to track longer-term trends and/or make more strategic business decisions.

We also asked "How would you most like to access and/or receive data updates?"; responses are presented as "Preferred access" on Table 6.1. Survey respondents could choose up to three preferences for this question. About 60% of each market segment prefers to receive data updates via "Email," while another about 40% chose "Website" as one of their preferred access options for data updates. A handful of respondents, especially producers (20%), are interested in updates via a "Smartphone app." "Printed materials" are also a preference among 18% of producers and 29% of retailers. Some retailers (21%) are interested in receiving updates via "Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API)," but this option is fairly unpopular with other market segments, as were other options we presented, including "Social media (Facebook, Instagram, etc.)," "Phone call," "Radio," "Podcast," and "In-person." Overall, responses to this question suggest that email and website updates are the most effective way to communicate data updates with organic agrifood system stakeholders in California. Of note, responses to this question may have been somewhat biased by our own methods for survey outreach (mailed postcards, some emails, fewer phone calls, and minimal in-person outreach). Had we included outreach methods like social media posts, radio

[16] The option "Less often than yearly" was excluded from Table 6.1 because less than 2% of any one market segment chose this response option.

adds, or podcast outreach, we may have recruited more people who use these methods as their primary communication platforms. Nonetheless, email and website updates are strong preferences among our respondents and should not be overlooked in future data communications from USDA.

Participants want more information on major specialty crops (especially citrus, nuts, grapes, stone fruit, olives, avocados, and tomatoes) and livestock / poultry / dairy products (like beef, poultry, pork, dairy, and eggs). To get more clarity on what specific organic products respondents want more data on, we asked two separate questions. The first was "How useful would additional data on organic products in each of the following categories be to your [organization]?" and is presented as "Most useful product categories" in Table 6.1. Among producers, the category with the highest usefulness ranking is "Major specialty crops." Thirty percent of producers responded that additional data on organic major specialty crops would be very or extremely useful. About 30% of distributors and processors and 50% of retailers agree that additional data on organic specialty crops would be very or extremely useful. Processors and retailers are also fairly interested in some other product categories. Slightly more than 20% of processors are also interested in "Major grain crops" and "Value-added grain products." Retailers are more interested in "Livestock and/or poultry" and "Dairy and/or eggs" than major specialty crops; 57% of retailers find additional data on these product categories very or extremely useful. Overall, retailers are more diverse in their product category interests though, demonstrating some interest in all the categories already mentioned along with some interest in "Value-added dairy and/or egg products" and "Value-added livestock and/or poultry product." We also asked about non-food product categories ("Non-food commodities like cotton or other fibers" and "Value-added non-food products like textiles"), but results for these categories are excluded from Table 6.1 due to a lack of interest in them among all market segments. Given the dominance of specialty crops in production in California, it is no surprise that this product category is dominant among survey respondents. Unsurprisingly, we see more diversity in types of organic products additional data would be useful for further along the agrifood supply chain, likely because processors and retailers are more diverse in their product foci within California.

We also asked all of our survey respondents, "How important to your [segment] operation are each of the following aspects of organic price and volume data?", using a 5-point scale of response options for each of the eight data aspects described in the previous report section.[17] We presented the average importance ratings in our importance-satisfaction analysis in the previous section of this report. Because this question also illustrates details of an ideal data source, Table

[17] The scale included response options "Not at all important," "Of minor importance," "Moderately important," "Important BUT NOT essential for using the data," and "Important AND essential for using the data." The data aspects were availability, articulated on our survey as "The data are available and/or updated as often as we need," products covered ("The data cover the right products"), geographies covered ("The data cover the right geographic area(s)"), accessibility ("The data are easy to access"), accuracy ("The data are accurate"), interpretability ("The data are easy to understand and interpret"), usability ("We are able to use the data the way we want to"), and works well with automation ("The data work well with automated reports we use or want to use").

6.2 shows more detailed results from this question. Here we and have condensed the first two response options (“Not at all important” and “Of minor importance”). As Table 6.2 shows, the most important aspect of data for all segments is accuracy; 49% of producers, 41% of distributors, 47% of processors, and 71% of retailers ranked this category as “Important AND essential for using the data”. The second most important aspect of data for distributors, processors, and retailers was the products covered by the data; 30% of distributors, 28% of processors, and 64% of retailers ranked products covered as important and essential, as did 39% of producers. The second most important aspect of the data among producers is interpretability, which is also highly ranked among other segments. Forty-one percent of producers ranked interpretability as important and essential, as did 26% of distributors, 29% of processors, and 36% of retailers. Data availability is ranked highest among retailers and processors; 43% of retailers and 26% of processors ranked this as important and essential. Geographies covered is ranked as important and essential most among retailers (50%) and producers (36%). Data Accessibility is ranked as important and essential most among retailers (43%), producers (38%), and processors (35%), but distributors are more likely to rank this aspect as important but not essential (30%). Data usability is ranked as important and essential most among retailers (43%), processors (29%), and producers (28%), but distributors were again more likely to rank this aspect as important but not essential (22%). The data working well with automation is the only data aspect that is not most likely to be ranked as important and essential by any market segment. In fact, 32% of producers find this data aspect to be not at all or only moderately important.

Table 6.2 – Importance of Various Aspects of Ideal Data Source by Market Segment

	Farmers (N=152)	Distributors (N=27)	Processors (N=34)	Retailers (N=14)	Total (N=227)
Availability					
Important AND essential	36 (24%)	6 (22%)	9 (26%)	6 (43%)	57 (25%)
Important BUT NOT essential	21 (14%)	7 (26%)	6 (18%)	1 (7%)	35 (15%)
Moderately important	29 (19%)	3 (11%)	6 (18%)	3 (21%)	41 (18%)
Not at all / Minorly important	38 (25%)	2 (7%)	2 (6%)	1 (7%)	43 (19%)
Products covered					
Important AND essential	60 (39%)	8 (30%)	13 (28%)	9 (64%)	90 (40%)
Important BUT NOT essential	18 (12%)	4 (15%)	4 (12%)	0	26 (11%)
Moderately important	17 (11%)	4 (15%)	5 (15%)	2 (14%)	28 (12%)
Not at all / Minorly important	28 (18%)	2 (7%)	1 (3%)	1 (7%)	32 (14%)
Geographies covered					
Important AND essential	55 (36%)	4 (15%)	6 (18%)	7 (50%)	72 (32%)
Important BUT NOT essential	22 (14%)	6 (22%)	5 (15%)	0	33 (15%)
Moderately important	17 (11%)	4 (15%)	8 (24%)	3 (21%)	32 (14%)
Not at all / Minorly important	17 (11%)	3 (11%)	4 (12%)	2 (14%)	26 (11%)
Accessibility					
Important AND essential	57 (38%)	6 (22%)	12 (35%)	6 (43%)	81 (36%)
Important BUT NOT essential	18 (12%)	8 (30%)	6 (18%)	3 (21%)	35 (15%)
Moderately important	21 (14%)	2 (7%)	5 (15%)	2 (14%)	30 (13%)
Not at all / Minorly important	28 (18%)	2 (7%)	0	1 (7%)	31 (14%)
Accuracy					
Important AND essential	75 (49%)	11 (41%)	16 (47%)	10 (71%)	112 (49%)
Important BUT NOT essential	11 (6%)	3 (11%)	1 (3%)	0	15 (7%)
Moderately important	13 (9%)	2 (7%)	3 (9%)	1 (7%)	19 (8%)
Not at all / Minorly important	24 (16%)	2 (7%)	1 (3%)	1 (7%)	28 (12%)
Interpretability					
Important AND essential	63 (41%)	7 (26%)	10 (29%)	5 (36%)	85 (37%)
Important BUT NOT essential	22 (14%)	6 (22%)	7 (21%)	4 (29%)	39 (17%)
Moderately important	14 (9%)	3 (11%)	5 (15%)	2 (14%)	24 (11%)
Not at all / Minorly important	23 (15%)	2 (7%)	0	1 (7%)	26 (11%)
Usability					
Important AND essential	43 (28%)	4 (15%)	10 (29%)	6 (43%)	63 (28%)
Important BUT NOT essential	27 (18%)	6 (22%)	6 (18%)	3 (21%)	42 (19%)
Moderately important	23 (15%)	4 (15%)	6 (18%)	2 (14%)	35 (15%)
Not at all / Minorly important	27 (18%)	3 (11%)	0	1 (7%)	31 (14%)
Works well with automation					
Important AND essential	17 (11%)	3 (11%)	6 (18%)	2 (14%)	28 (12%)
Important BUT NOT essential	19 (13%)	5 (19%)	9 (26%)	3 (21%)	36 (16%)
Moderately important	21 (14%)	3 (11%)	5 (15%)	5 (36%)	34 (15%)
Not at all / Minorly important	49 (32%)	4 (15%)	2 (6%)	1 (7%)	56 (25%)

Source: Organic Data Initiative Gap Analysis Surveys (2024)

We next asked “What three organic products would you most like to have more price and volume information on?” This was an open-response question, results from which we have categorized and present in Table 6.3. This question allows us to offer more clarity on what specific products might be most useful to provide additional data on. Citrus, nuts, grapes, stone fruit, olives, avocados, and tomatoes are the top specialty crops that were listed in some variation by producers in response to this question. Twenty-five producers listed citrus (11) or some specific kind of citrus, including lemons (4), grapefruit (3), oranges (3, including one specifying early naval oranges), mandarins (2 including one specifying satsuma mandarins), tangerines (1), and kumquats (1). Twenty-three producers listed nuts (1) or some specific kind of nut or nut product, including walnuts (11), almonds (8, including one specifying raw almonds and one specifying almond butter), pistachios (2), and macadamias (1). Four processors also mentioned nuts, including almonds (2), walnuts (1), and cashews (1). Twenty producers listed grapes (4) or some specific kind of grape or grape-product, including wine grapes (9 including one that specified Ancient Zinfandel and one that specified premium wine grapes), raisins (3), raisin grapes (2 including one that specified raisin grapes for crush), table grapes (1), and wine (1). Nineteen producers listed stone fruit (5) or some specific kind of stone fruit, including cherries (5 including one that specified California-grown cherries, and one that specified Bing and Rainer), peaches (5 including one that specified fresh market peaches), fresh market nectarines (1), fresh market plums (1), pluots (1), and Spice Zee nectaplums (1). In addition to these major specialty crop categories, there are a few specific specialty crops that were listed repeatedly. Nineteen producers listed olives (9) or some specific type of olive or olive product, including olive oil (5), olives for oil (3), and table olives (2). Sixteen producers listed avocados (11) or some specific variety of avocados or avocado product, including Hass avocados (3) and avocado oil (2). Fifteen producers and four distributors listed tomatoes (9 producers and all 4 distributors), Heirloom tomatoes (5 producers), or tomato paste (1 producer).

Table 6.3 – Products Most In Need of More Price and Volume Data by Market Segment

	Farmers (N=152)		Distributors (N=27)		Processors (N=34)		Retailers (N=14)	
	n	Included varieties & items	n	Included varieties & items	n	Included varieties & items	n	Included varieties & items
Additives	0		5	vanilla (incl. beans & extract), essential oils, black pepper	5	sugar, spices	0	
Apples	8	juice, sauce, cider vinegar	0		0		1	n/a
Avocados	16	Var: Hass; Item: oil	0		1	oil	1	n/a
Berries	11	strawberry, blackberry, blueberry, raspberry, waxberry	0		0		1	n/a
Citrus	25	lemon, grapefruit, orange, mandarin, tangerine, kumquat	1	n/a	0		0	
Corn	3	n/a	1	n/a	1	n/a	0	
Cucumbers	3	n/a	1	n/a	0		0	
Cut flowers	7	rose, dahlia, ranunculus	0		1	edible flowers	0	
Drinks	0		0		3	coffee, tea	0	
Grains	15	wheat, barley, oats, rice; Item: flour	0		9	Var: millet, oat, rice, sorghum, wheat; Item: flour	0	
Grapes	20	Var: wine, premium wine, ancient zinfandel, raisin, raisin crush, table; Item: raisins, wine	0		0		0	
Hay	12	alfalfa, grass, oat	0		0		0	
Herbs	3	medicinal	2	basil	2	n/a	0	
Inputs[a]	11	seeds/starts, fertilizer, herbicides, pesticides, lease/rent costs, labor costs	1	seeds	0		0	
Leaf veggies	9	lettuce, microgreens, bunched greens, endives, escarole	1	iceberg lettuce	3	wild arugula, kale, spinach	1	lettuce
Livestock / Poultry / Dairy	25	beef, eggs, milk/dairy, pork, lamb, wool, soup bones	7	meat, beef, dairy	13	beef, pork, poultry, eggs, cream	12	eggs, dairy, poultry, beef
Mushrooms	0		3	dried	0		0	
Melons	2	n/a	0		0		0	
Nuts	23	Var: walnuts, almonds (incl. raw), pistachios, macadamia; Item: almond butter	0		4	almonds, walnuts, cashews	2	n/a
Olives	19	Var: for oil, table; Item: oil	0		1	oil	0	
Persimmons	5	fuyu, hachiya	0		0		0	
Rhubarb	3	english	0		0		0	
Root crops	7	onions, garlic, potatoes, sweet potatoes, beets, carrots	3	garlic, onion	1	beets	1	potatoes
Squash	5	Summer (incl. green & yellow), winter (incl. kabocha & butternut)	0		0		0	
Stone fruit	19	peaches, cherries, nectaplums, nectarines, plums, pluot	0		0		0	
Tomatoes	15	Var: heirloom; Item: paste	4	n/a	0		0	
Other tree fruits	12	pears, pomegranates, figs, kiwi, quince	2	bananas, mangos	3	Var: dates; Item: coconut oil	2	bananas
Other veggies	11	chilis, artichoke, eggplant	5	bell peppers, peppers, french beans	6	beans (incl. mung), cabbage, hot peppers	2	n/a
Other	9	aloe vera, dairy replacement, hawthorne, hibiscus, honey, jams/jellies, lavender, soybeans	5	dragon fruit, oils, pumpkin kernel, soybeans	4	soybeans (incl. natto), cacao, cassava, pulses	3	bees wax, honey, pollen

Source: Organic Data Initiative Gap Analysis Surveys (2024)

[a] We recognize that these may fall outside the scope of AMS Market News but include them for a broader understanding of industry data needs.

Livestock, poultry, dairy, and related products are also consistently listed across all market segments. Twenty-five producers listed livestock (2) or some specific type of livestock /poultry / dairy or livestock / poultry / dairy product, including eggs (6), beef (7 including one that listed beef steaks, one that listed ground beef, and one that listed cull dairy cattle), milk and/or dairy (5), egg products (1), lamb (1), pork (1), wool (1), and soup bones (1). Seven distributors also listed livestock / poultry / dairy products including meat (3), beef (2 including one that listed dairy slaughter cows), dairy cattle (1), and dairy (1). Thirteen processors also listed livestock (2) or some specific livestock / poultry / dairy products, including beef (4), eggs (2), pork (2), poultry (2), and cream (1). And twelve retailers listed livestock (1) or some specific livestock /poultry / dairy products, including eggs (4), milk and/or dairy (4),[18] poultry (2 including one that specified chicken), beef (1), and meat (1).

Grains and food additives are also consistently listed in this free-response question about what top three organic items survey respondents would like to have more price and volume data on. Grains and flour were consistently listed by both producers and processors. Fifteen producers listed grains (8), flour (1), or specific grain types, including barley (2), wheat (2), rice (1), and oats (1). Nine processors also listed grains (3), flour (1), or specific grain types, including Proso millet (1), value-added oats (1), rice (1), sorghum (1), and wheat (1). Ten distributors and processors also listed various food additives, like vanilla (3 distributors, including two listing vanilla beans and one listing vanilla extract), sugar (3 processors), spices (1 distributor listed black pepper and 1 processor listed spices), essential oils (1 distributor), and cacao (1 processor).

One unexpected category that several producers listed items from was inputs. While no producers described these specific items as “inputs”, this seemed the most fitting title given the items included. Eleven producers listed some kind of production input items, including starts or seeds (4; each was listed differently: annual flower starts, perennial starts, veg/seed crops, and vegetable starts), fertilizer (3), herbicides (1), pesticides (1), grazing lease or rent rates (1), and labor costs (1). We heard a similar need for increased data on non-production items in our interviews. Some producers shared that a database of brokers would help them find markets for their products, and some distributors and farmers talked about tracking shipping rates.

Our interview data reveals some of the same data needs identified in our survey. One consistent theme that emerged when analyzing our interview transcripts about data needs is more details on available data and more longer-term data trends for organic specialty crops and more unique versions of other commodities.[19] We heard a consistent call for longer-term data trends, as described by a small retailer below, who is talking about USDA data generally. They describe

[18] One respondent listed “eggs and dairy”; this response was counted in each of these categories here, making the total for the categories (13) greater than the reported total responses for the livestock category overall (12).
[19] While we are not currently aware of any crops unique to organic production, considering any varietal differences uncovered between organic and conventional production as AMS Market News organic data is expanded moving forward may help address our findings in this section.

wanting data that could help them make better predictions about future market trends. They seem to think that USDA probably has data that could help them make these predictions, but it is not clear to them how to make these predictions from the data that they are able to find and understand.

> *Like to say … the wheat crop is looking like it's gonna be like XYZ right now. That's never really felt accessible to me as a retailer. … If we're thinking that it's going to be a good citrus year or a bad citrus year or a slow citrus year. If we think tomatoes are going to be trailing behind by a month like they were last year or whatever. All of that information would be useful to me as a retailer, I just don't know how to distill it from the commodity information that I have looked at over time.*
> *(Small grocery retailer, Interview 4)*

This retailer feels that they lacked the details from wheat crop reports to make market predictions, but that reports more focused on outlooks about how well and/or quickly citrus might make its way to stores in a given year would be more useful. They explain that knowing things about production timing would be helpful for them as a retailer, but that these predictions are challenging for them to make from existing USDA data, like commodity reports. This indicates a need for more explanation of trends for organic products.

Similarly, a processor of fresh cut greens describes their data needs as including better access to information on why prices might be changing over time. They describe this as beneficial when setting prices with their buyers and note the value of a neutral party, like AMS, being the source for this information.

> *If we're gonna go out to our big customers and ask for a price increase, a lot of times we need information … and validation to make that increase. So, let's say organic kale pricing's up 5% year-over-year, having some sort of grower input onto why that 5% is happening, whether it's labor or water or … I think we understand a lot of those challenges, because we were growers, but having that data published in a kind of fair report that's … from AMS … I think that would be helpful. So then you have some validation, this is why the price has gone up and so forth.*
> *(Small fresh cut greens processor, Interview 1)*

Here the data needed are more than just points of data that indicated where the market price is at. This processor needs to more clearly be able to explain to their customers why they need to change their prices and what is causing an increase. This explanatory information is what would be useful for them to negotiate for a fairer price with customers when they are experiencing those price increases from the producers they worked with.

We also interviewed a processor interested in expanding the market for millet in an effort to support sustainable growing practices among oat farmers. They explained that millet is an especially useful grain to include in a crop rotation with oats to practice no-till farming but that many farmers are reluctant to grow it, both because there is a limited market, but also because it is challenging for them to get crop insurance for it. This processor describes needing more pricing data on prose millet in particular, and for data to be collected from more states so that

growers are more comfortable incorporating millet into their crop rotations and improving the regenerative nature of their farms.

> *We can talk about … the lack of crop insurance around millet, and why we need USDA to be collecting data on prices, because if we don't have that actuarial data, then they're not going to be able to provide crop insurance for it. … And it's not … that USDA doesn't collect any millet data. And it's particularly proso millet, is the one that's particularly valuable because it is very high in protein. [USDA] collects data in Colorado, … Nebraska, and South Dakota, but that's it. Why? Why just three states? That doesn't make any sense. We need them to track data in all the states. And millet is used for so many different things. There's the grain, there's forage millet, there's... It's used in many ways for both human consumption and animal consumption. It's just valuable as a rotation crop to hold down your topsoil. You know, if you end up having a really short growing season, that's hot, and normally you wouldn't grow during that time, you can throw out millet, and in 60 days you can harvest it. And then you can leave that stubble behind and come in and plant your oats on top of it. So the oats are protected, and you don't have to do that tilling. And it's not that … farmers don't know how to grow millet … we've talked to the man who wrote the book on how to grow millet, the information is out there. They just need to have that data out there so they can get crop insurance so that they're assured that they're going to be backed if they grow it.*
> *(Grains processor, Interview 26)*

This processor provides some specific additions to available data that they would like to see: price tracking for prose millet in all states. But they also elaborate on their reasoning behind this: a longer-term goal of encouraging more farmers to use regenerative agriculture practices, especially no-till, through incorporating millet into their crop rotations. While the interest here is mostly individual data points, the goal is still to impact longer-term trends in the sustainable agriculture space.

We also heard a need for more clarity, easier access, and improved functionality of data already available through AMS Market News for specialty crops and other fresh products. For example, one retailer that regularly used SPINS data also mentioned that they would like to have a similar resource that covers fresh products, especially produce but also meat, dairy, and eggs. We heard this same sentiment from other retailers that rely on SPINS for data on consumer-packaged goods.

> *It would be helpful to have an aggregated database of current competitor prices for produce and meat and seafood products with natural/organic attributes (like SPINS does for center store products).*
> *(Small grocery retailer, Interview 16)*

This retailer is describing a database that allows participant retailers to share their data and observe the average pricing and price trends for various organic fresh products over time and at various, self-selected geographic levels. While AMS Market News does provide some retail prices for fresh organic products, these retailers are describing a database with more geographic granularity and trends over time.

Other interviewees mentioned specific organic products for which they would like to see more data on the products they grow that was easy to access and understand. For example, a producer noted wanting an easy way to look at what strawberries are going for to help them understand what they should be getting in the wholesale market.

> *If there was a pricing thing where I could go to a site and say okay, [I] wonder what strawberries are going for on wholesale, and then figure out my own wholesale … something I can look at, easy, like the easy button, flick, … I would use something like that.*
> *(Produce grower, Interview 8)*

They emphasize the need for accessing these data to be extremely easy for them. There are already terminal market prices for organic strawberries available through AMS Market News, including for California; however, this producer seems unaware of this resource. This suggests that the data need to be made more easily available for growers who may not have the time to learn how to use the AMS Market News interface.

Another grower highlighted a sentiment that was present in many of our other conversations: they want more details about what exactly is reflected in the numbers presented by USDA. Several people we talked to asked how the data are collected, or what types of pricing, products, or item sizes are included. This grower focused on transportation and how transportation costs are being factored into the pricing numbers published by USDA, especially for feed and seed commodities which they grow organically.

> *I do use the USDA services for hay and things like that. … But you and I right now are talking about transportation. Transportation is what is going to kill the consumer here, especially in California with all the regulations that are going on. ... So to have a national thing to tell me, "hey, the price of hay in Wisconsin is $100." It's completely different here. I mean, you can do a lot of things in Wisconsin that you can't do in agriculture in California because of our regulations, right? So... Would it be good for me to see that? I'm always interested in that. I like to look at a lot of different things, right? But I need to know what's going on around here. … I need to know because it's all based on transportation. … But you're talking about … my broker would haul the hay at 20 bucks a ton. Now it's 30 bucks a ton. So is he going to buy my hay from here? Or is he gonna buy [from] a guy in [another county] that he has to haul it for $14 a ton instead of hauling m[ine for] $35? So automatically, my hay went up $17 a ton just because of the trucking.*
> *(Large producer, Interview 15)*

In short, the variation in transportation costs make it difficult to apply existing USDA data to their business, showing the need for additional details about the surrounding context in which the USDA data are collected for the data to be useful for them.

A handful of other interviewees discussed other non-price-and-volume data when we asked about their business's data needs. These concentrated around people's ability to keep track of quickly-

changing regulations, and producers ability to find brokers to work with for their orchard crops.[20] For example, a tree fruit grower responded to our question about what other data they might find useful for their business with the following statement demonstrating how they would like additional information about current quarantine requirements.

> *They publish all kinds of quarantine requirement[s], everything. We don't have time really to do the research for ourselves. So basically, when it comes to, "oh" .... The broker will tell you, "oh, this year you have [a quarantine requirement] and you're going to pay this, that's that." Supposedly, those things [are] supposedly there, right? But it's just… Nobody's really putting the easy way for us to really quickly learn [about quarantine requirements] … it seems we're the last one[s] to really know anything about that.*
> *(Orchard producer, Interview 12)*

This grower feels they have to rely on their broker to determine current regulations, but they express some unease about this and a desire to know earlier about regulatory requirements that might add to their costs when selling their fruit. They want an easier way to check what they would have to do with their fruit when selling it. We heard similar sentiments from a spice distributor that talked about importing spices in an ever-changing regulatory environment. They sometimes have to do considerable "troubleshooting with USDA" to ensure that their imports are meeting regulatory requirements and they mentioned wanting more "quick ways of obtaining information regarding the latest regulations" from USDA (Interview 7). While these calls for more information on non-price and volume data were repeated throughout our interviews, they largely fall outside the scope of AMS Market News. Overall, our interviewees want easier and clearer access to organic data already available through AMS Market News, more explanation of those data, and more trend information.

[20] Many of the things discussed within this interview theme are outside the purview of AMS. For example, other entities within USDA handle international quarantine issues, while state agencies like the California Department of Food and Agriculture and USDA coordinate quarantines between states and within states.

Pricing Determinations and Data Use

In this section, we review our research findings as they relate to our third research question, "How is pricing currently determined for organic commodities? Are producers/handlers utilizing AMS Market News or other data sources as a guide?" In summary, the ability to cover business expenses, information from informal sources, and market pressures commonly shape pricing decisions. Our respondents also heavily rely on their own negotiation skills when negotiating for fairer pricing and on their own experience when evaluating prices. For most market segments, organic data from AMS Market News are not central to decisions about price-setting, but these data are consistently used by distributors/wholesalers, especially when negotiating on pricing.

Our survey data point towards informal organic price and volume data sources being more influential in pricing decisions and negotiations than formal sources like AMS Market News. Covering business expenses is also a consistent consideration when evaluating and/or negotiating prices. Presented in Table 7.1 as "Information used to set and/or evaluate prices," we asked all survey respondents "Which of the following information sources do you or your operation rely on most to set prices for your organic products and/or evaluate the fairness of an organic product price?" Respondents could choose up to three options. Producers, distributors, and retailers are all most likely to use informal information sources like their own observations of the market or individual conversations. Thirty-four percent of producers rely on "individual conversations with distributors/wholesalers, processors, retailers, or consumers", as do 22% of distributors and 36% of retailers. And 32% of producers rely on "Individual observations from local markets (produce terminals, wholesale markets, produce departments, farmers markets, etc.)," as do 26% of distributors and 50% of retailers. At the same time, 26% of producers, 19% of distributors, and 21% of retailers rely on "Organic price and volume data from other sources (NOT from AMS Market News)" and 14% of producers, 19% of distributors, and 7% of retailers rely on "Organic price and volume data from AMS Market News." While these percentages indicate some use of organic price and volume data, use rates are higher for data sourced outside AMS Market News, and no data sources are relied upon as much as informal information sources like individual observations and conversations for these three market segments. Processors are slightly different; they are just as likely to use informal information sources (18% rely on individual conversations and 21% rely on individual market observations) as organic price and volume data. And processors use the AMS Market News organic data (21%) slightly more than other organic price and volume data (18%). Responses to this question also show a consistent reliance on "the ability to cover our own business expenses" when setting and/or evaluating prices for organic products, especially for retailers; 22% of producers, 15% of distributors, 18% of processors, and 43% of retailers chose this option.

Table 7.1 – Information Used in Pricing Decisions and Negotiations by Market Segment

	Farmers (N=152)	Distributors (N=27)	Processors (N=34)	Retailers (N=14)
Information used to set and/or evaluate prices				
AMS Market News organic price & volume data	21 (14%)	5 (19%)	7 (21%)	1 (7%)
AMS Market News non-organic price & volume data	9 (4%)	2 (7%)	4 (12%)	1 (7%)
Other organic price & volume data	40 (26%)	5 (19%)	6 (18%)	3 (21%)
Other non-organic price & volume data	2 (1%)	0	3 (9%)	0
Individual observations from local markets	48 (32%)	7 (26%)	7 (21%)	7 (50%)
Individual conversations with distributors/wholesalers, processors, retailers, or consumers	52 (34%)	6 (22%)	6 (18%)	5 (36%)
The ability to cover our own business expenses	33 (22%)	4 (15%)	6 (18%)	6 (43%)
Advice from other farmers in our local marketplace	31 (20%)	4 (15%)	0	2 (14%)
What our counterpart in the sale will accept	25 (16%)	2 (7%)	3 (9%)	3 (21%)
Market data or information shared from the buyer	12 (8%)	3 (11%)	5 (15%)	n/a
Other information sources	8 (5%)	0	0	1 (7%)
Resources used when negotiating a fairer price[a]				
Information from counterpart in the sale	38 (25%)	B[b]: 5 (19%) S[c]: 5 (19%)	B[b]: 7 (21%) S[c]: 6 (18%)	5 (36%)
Information from other [segment] in our network	55 (36%)	B[b]: 7 (26%) S[c]: 9 (33%)	B[b]: 6 (18%) S[c]: 8 (24%)	4 (29%)
Our own negotiation skills	51 (34%)	B[b]: 11 (41%) S[c]: 10 (37%)	B[b]: 13 (38%) S[c]: 15 (44%)	10 (71%)
AMS Market News organic price & volume data	14 (9%)	B[b]: 6 (22%) S[c]: 7 (26%)	B[b]: 2 (6%) S[c]: 3 (9%)	0
AMS Market News non-organic price & volume data	3 (2%)	B[b]: 1 (4%) S[c]: 2 (7%)	B[b]: 1 (3%) S[c]: 0	0
Other organic price & volume data	21 (14%)	B[b]: 2 (7%) S[c]: 2 (7%)	B[b]: 3 (9%) S[c]: 5 (15%)	2 (14%)
Other non-organic price & volume data	3 (2%)	B[b]: 1 (4%) S[c]: 0	B[b]: 1 (3%) S[c]: 0	0
Information about our business expenses	31 (20%)	B[b]: 4 (15%) S[c]: 3 (11%)	B[b]: 3 (9%) S[c]: 6 (18%)	3 (21%)
Data we have collected through tracking our own products	26 (17%)	B[b]: 6 (22%) S[c]: 5 (19%)	B[b]: 5 (15%) S[c]: 6 (18%)	8 (57%)
I don't feel we can negotiate for a fairer price	35 (23%)	B[b]: 0 S[c]: 0	B[b]: 5 (15%) S[c]: 5 (15%)	3 (21%)

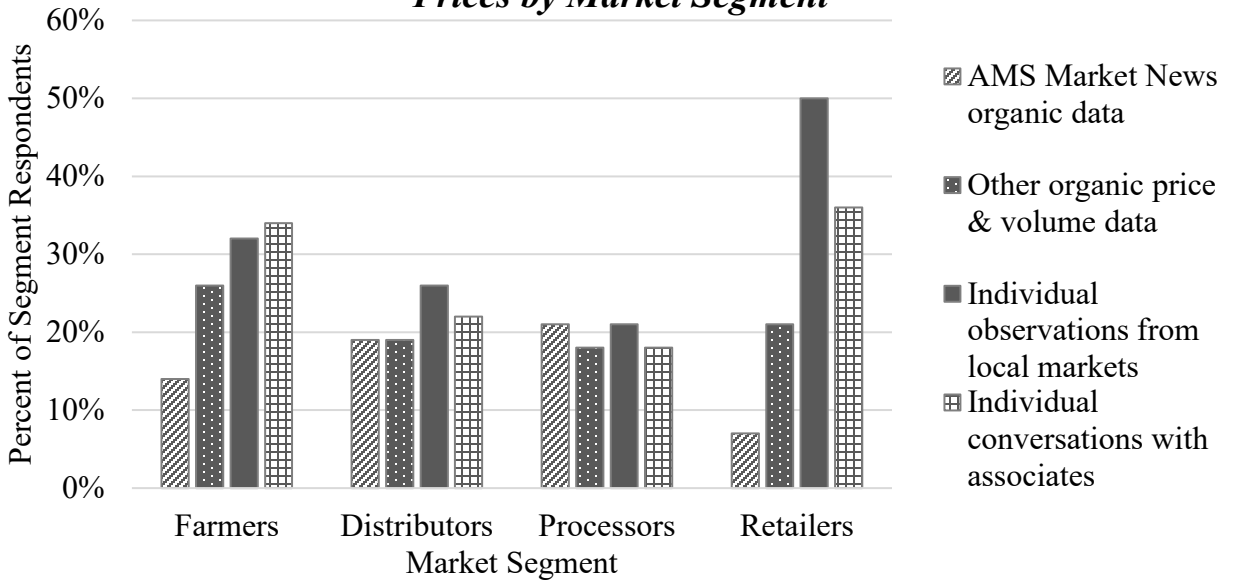
Source: Organic Data Initiative Gap Analysis Surveys (2024)

[a] Results for resources used when negotiating a fairer price are aggregated from multiple separate questions we asked survey respondents about their negotiations with different purchasing and sales channels. Results presented here represent the number of survey respondents that reported using that resource when negotiating for a fairer price in at least one sales channel.

[b] Responses demarcated with a "B" represent the use of a resource while *buying* organic products.

[c] Responses demarcated with an "S" represent the use of a resource while *selling* organic products.

Figure 7.1 - Main Information Sources Used to Set / Evaluate Prices by Market Segment



Source: Organic Data Initiative Gap Analysis Surveys (2024)

We also asked a series of questions about what resources survey participants relied on most when they were negotiating on prices through their various sales channels. We asked "When negotiating a fairer price in [sales channel], what recourses do you primarily rely on?" The sales channels included for producers were "sales directly to consumers," "sales to institutions or directly to retailers," "sales through intermediate channels," and "sales through other channels." We therefore asked this question to producers up to four times, each specifying a separate sales channel if they noted selling through that channel. We aggregated responses to these questions and present them as "Resources used when negotiating a fairer price" on Table 7.1. The numbers in Table 7.1 represent the number of each segment that reported primarily relying on each resource in at least one of their sales channels. Producers were only asked about the sales channels that they sold their products through, but distributors and processors were asked separately about the sales channels they bought organic products through (presented as "B" in Table 7.1) and those that they sold organic products through (presented as "S" in Table 7.1). We only report on the sales channels through which retailers purchased organic products in Table 7.1. The question was also slightly re-worded for distributors, processors, and retailers to "When negotiating for a fairer price for raw organic agricultural commodities [purchased from/sold to] [sales channel], what resources do you or your operation primarily rely on?" And the sales channels included farmers, institutions or retailers, intermediate channels, consumers, processors, and other channels.

Overall, aggregated results from these questions on resources used in negotiations mirror results from our question about information used to set prices, with one notable difference. The most heavily used resource for nearly all market segments when negotiating a fairer price id not information of any kind but "Our own negotiation skills." Thirty-four percent of producers rely

on their own negotiation skills in at least one of their sales channels, as do 71% of retailers. Distributors and processors also rely primarily on their negotiation skills, both when purchasing and selling. Forty-one percent of distributors and 38% of processors rely on their own negotiation skills in at least one of the sales channels they purchase organic products through. And 37% of distributors and 44% of processors rely on their own negotiation skills in at least one of the sales channels they sell organic products though.

Information from informal sources is once again relied upon more when negotiating for a fairer price than are price and volume data from AMS Market News or other sources. For example, "Information from other [segment businesses] in our network" is used by 36% of producers, 26% of distributors when buying organic products, 33% of distributors when selling organic products, 18% of processors when buying organic products, 24% of processors when selling organic products, and 29% of retailers. Similarly, "Information from counterpart in the sale" is used by 25% of producers, 19% of distributors when buying or selling organic products, 21% of processors when buying organic products, 18% of processors when selling organic products, and 36% of retailers. And "Data we have collected through tracking our own products" is used by 17% of producers, 22% of distributors when buying organic products, 19% of distributors when selling organic products, 15% of processors when buying organic products, 18% of processors when selling organic products, and 57% of retailers. These rates are consistently higher than use rates for any formal price and volume data for producers, processors, and retailers.

However, the increased reliance on AMS Market News organic data among distributors may indicate its broader impact in the market. Distributors are more likely to use "Organic price and volume data from AMS Market News" as compared to other market segments, and as compared to some of their own use of informal information. Twenty-two percent of distributors use organic AMS Market News data when buying organic products and 26% of distributors use them when selling organic products. In the aggregate (and excluding negotiating skills), AMS Market News organic data is the second-most important data source for our distributor respondents when setting, evaluating, and/or negotiating on organic prices. This is especially noteworthy given the positionality of distributors as being one of the main nodes through which prices are set, both when they buy organic products and when they sell organic products. For example, no distributors in our survey report "I don't feel we can negotiate for a fairer price" either when buying or selling their organic products. In contrast, 23% of producers, 15% of processors, and 21% of retailers that took our survey report feeling this lack of ability to negotiate on pricing. The consistent use of AMS Market News organic data for distributor pricing decisions, coupled with their increased influence on pricing in the market as compared to other market segments, suggests that AMS Market News organic data remains relevant in overall market pricing, even if other data sources are more consistently used among our respondents overall.

Our analysis of interview conversations about setting prices yielded similar themes to what our survey data showed. Interviewees often talked about setting prices to cover business expenses, especially smaller producers and retailers. Many of the businesses interviewed set their prices based on their costs with some added margin. For example, a beef processor and producer

describes their pricing decisions as a "cost plus program" and references using USDA data as a baseline. While they process certified organic beef, most of the animals they produces are not certified organic, but are raised using non-GMO and regenerative practices. They note elsewhere in the interview the challenge they face finding pricing data for this specific subset of the livestock market, so they describe their price setting practices within this context as:

> *I certainly use a baseline USDA pricing, with prime select kind of reports. And then, just thinking about my costs, a lot of economic analysis around what my costs are increasing to [for] non-GMO or regenerative practices. So that it just becomes a cost plus program. And so my baseline is USDA pricing, I know what my costs are, [I] add that in and throw a margin on top of that. So that's my structure to get out to those pricing points.*
> *(Beef grower-processor, Interview 2)*

They describe using USDA data on conventional beef production to help them estimate what their price should be for their non-GMO/regenerative beef. But they ultimately take this "cost plus" approach to considering what their expenses are and including a margin on top of it to set their prices.

Retailers also use margins regularly to set prices for their organic products, especially produce. For example, a smaller grocery retailer responded to a question about how they set prices when buying from farmers or distributors. They explain that it is more of a question about whether or not they will source that product at all, but when they do accept a price increase, they pass any higher prices on to their own customers.

> *It's mostly them saying, hey, these are the prices for the products. And we say okay, sure, or oof, that's a little steep, can't do it. Or we say sure, we'll do it and then the price tag on our shelf is a little high.*
> *(Small grocery retailer, Interview 5)*

A few moments later, we asked about any information they use in addition to the SPINS database they had previously mentioned using when setting prices. In their response, it is clear that they prioritize meeting industry margins.

> *So when I asked our CFO what he's generally checking he says he always… [SPINS] is one piece of it. He's always making sure that we're pretty much in line with conventional grocery marts. Not just the natural organic sales channel, but [it's] grocery, grocery in general, that we try to match conventional industry margins.*
> *(Small grocery retailer, Interview 5)*

While the price data they use seem to have informed their pricing decisions, it is also clear that prices set by distributors and producers, with an added margin, often determine the shelf prices for their organic products.

Aiming to hit a particular margin is common practice among the retailers we interviewed, but it does not prevent them from responding to market pressures. They often utilize flexibility within their margin for individual products to reach an overall margin and accommodate market-wide prices. For example, this retailer with two stores explained raising their margin on other products

to accommodate selling bananas at cost, which they mentioned elsewhere in the interview was a necessity because of competitor prices on bananas.

> *I just calculate price per pound, price per unit, depending on how it's sold, either by pound or by unit. And if my wholesale is $1 then my target market would be $1 times 1.7. So my theoretical sales prices would be a $1.70 per pound or for each. But that's quickly, easily, usually rounded down to $1.69. Or, in order to subsidize bananas going out at cost and it's the number one seller, going up to $1.79. And that's actually quite needfully the case because things [are] subsidized, certainly bananas are under heavy subsidy now within the department.*
> *(Small grocery retailer, Interview 7)*

While their goal was to sell their organic produce with a 70 percent margin, they respond to market pressures, like the artificially low market price for bananas, by adjusting this margin such that they got an average margin of 1.7 across their whole produce department. They can, therefore, increase the margin on some products and lower it on others to stay competitive.

We also see processors and distributors responding to market pressures in how they set prices. For example, one small fresh-cut processor talked about not being able to easily push higher prices on their clients, in part because they are a smaller processor.

> *A lot of our bigger customers are longer term contracts. And changing those prices is really tough. Especially if you want to be competitive and then, our company being a little bit smaller in kind of the Fresh Cut arena. We're not the big player. So we know [what] our margins are and our pricing is probably a lot higher and our margins are probably [a] little smaller. So we have to really try to find ways to be efficient, or be more efficient, continue to improve, to kind of absorb some of the higher raw costs that tends to happen.*
> *(Small fresh cut greens processor, Interview 1)*

They explain that they have longer term contracts with their bigger buyers that make it hard to change their prices. But they also describe wanting to be competitive on pricing for their customers, and that this is especially important because they are a smaller player. Instead, they explain that they look for ways to internalize increased costs from their growers by making their own business more efficient. Here the market pressure of being a smaller processor is making the company adjust their internal practices rather than increase their prices.

In contrast, we heard from a larger tree fruit distributor that was able to push higher prices on to their customers because they were large enough to avoid that market pressure of being a smaller player.

> *We're pretty lucky for the organic, in California especially, we're kind of the biggest handler of California organic. And so, the clients we've had we've been really able to kind of push pricing on them, you know, obviously, you can't push too hard, otherwise they'll jump to someone else, but it's kind of that fine balance to try and maximize what we can return back to growers.*
> *(Mid-sized tree fruit grower-shipper, Interview 3)*

They describe being the largest handler of organic in California for the type of tree fruit they work with, which allows them to push pricing on their customers in a way that the previous

processor was not able to do. They are still constrained to remain competitive, as indicated by their note about not being able to push too hard or their customers may start working with someone else. But their ability to remain competitive while increasing prices seems much greater than the smaller fresh cut greens processor above.

Another theme that emerged is the reliance on experience in setting or evaluating prices. Many processors and retailers discussed this in reference to setting or evaluating prices, especially when purchasing raw agricultural products. While often not stated explicitly, it was clear from discussions of how people decide who to work with, whether or not a price was fair, and what information they rely on, that personal experience is playing a big role for some actors. For example, a wine maker noted this throughout the few minutes of our conversation where we focused on their decision process when buying grapes. While these statements were not made back-to-back, they clearly outline the reliance on experience this wine maker uses when buying and/or evaluating grapes.

> *I have a general idea of what it's worth, and if that's the price that it is, then I'll look at it.*
> *Interviewer: So you have a lot of experience that's going into your thought process there, sounds like?*
> *Interviewee: Yes. Yeah. And I can look at it and know what it's worth and what I can sell it for… Based on my experience, I have an idea of the end product I'm going to make and what I can charge for that end product.*
> *(Small wine processor, Interview 20)*

While our interviewee did not bring up the role of their experience explicitly until we asked about it, it was clear from the first quote that they are relying on their own understandings of what the grapes are worth. When explicitly asked about experience playing a role, they agree and tie this understanding to what they would be able to sell with those grapes. And a little later, they further elaborate that their experience allows them to understand what quality of wine they could make with different grapes and what they might be able to charge for it. Experience is driving their understandings of what value a product would bring to the processor, which is, in turn, driving their grape purchases.

We heard something similar from this retailer. They describe day-to-day experience being a driver of their understanding of the market, rather than any external data source.

> *When I was new, back in '87, as a buyer, I was voracious and reading everything. But what ends up being truly useful is just the day-by-day price availability compared to quality compared to reliability compared to ... That's just constantly changing every day.*
> *(Small grocery retailer, Interview 7)*

They talk about how they used to read considerable external information to help improve how they did their job, but that the day-to-day observations of the market are what ended up "being truly useful." And these day-to-day observations make up experience, even though the term is not used here. While discussed with various wording, personal experience is an important factor influencing pricing decisions among our interview respondents. Along with covering business expenses and informally-sourced information, personal experiences are more front-of mind for

our interview participants than AMS Market News organic data when discussing pricing decisions.

Recommendations

Our research reveals specific areas where AMS Market News organic data is working well for California's organic agrifood stakeholders. Overall, survey and interview respondents report wanting price and volume data for organic products already tracked in AMS Market News, indicating the importance of the data source for our stakeholder respondents. Our importance-satisfaction analysis also reveals that research respondents using and/or familiar with AMS Market News organic data are satisfied with its automation abilities (Figures 5.2-5.4), suggesting the effectiveness of recent efforts to improve these (e.g. the development and explanation of the MyMarketNews API). And at least some respondents from all market segments report using AMS Market News organic data to evaluate market conditions, plan for the future of their business, and/or set prices (Table 5.2). The most consistent use of AMS Market News organic data is among distributors, who have a crucial price-setting role in the organic market. Nearly 20% of distributors in our survey regularly use AMS Market News organic data (Table 4.1). And distributors are more likely than respondents from other market segments to use these data when setting, evaluating, and/or negotiating on pricing decisions (Table 7.1). This identifies one market segment for whom these data are particularly important. It also suggests the broader impact of AMS Market News organic data in the organic market despite lower reports of their use by respondents from other market segments.

Based on our research findings, we propose the specific recommendations outlined below related to improving and increasing the coverage of AMS Market News organic data, improving the accessibility of AMS Market News organic data, and updating AMS Market News organic data offerings to match competitors. Here our main recommendations are presented in list form below the specific questions. The following sections provide detailed overviews by recommendation question. Overall, these recommendations focus on improving the consistency and offerings of AMS Market News organic data, including additional explanations of terms, data collection, and trends, and leveraging communication by email to better promote and update stakeholders on AMS Market News organic data offerings.

<u>Main recommendations by question</u>:

1. How can current AMS Market News data be improved or increased to fill gaps in existing data offerings?
    a. Address gaps in organic data where possible and provide explanations of those data gaps where they are unavoidable.
    b. Expand AMS Market News organic data to include additional specialty crops, analyses, and data trend explanation.
2. Should any other accessibility or access needs be addressed to improve use of AMS Market News data for organic industry stakeholders?
    a. Develop and promote an easier (and clearer) item-based search process.

   b. Include clearer explanation of terms used throughout the AMS Market News data, as well as overviews of the data collection process.
3. How can AMS Market News better provide data that is currently provided by other sources, including paid services, to better serve organic industry stakeholders?
   a. Develop more visualizations of organic commodity data.
   b. Promote AMS Market News organic data and provide regular data updates via email.
   c. Consider developing tailored data access points for different market segments.

Recommendation 1: Improve and Increase Coverage of AMS Market News Organic Data

In this section, we present our recommendations focused on the question "How can current AMS Market News data be improved or increased to fill gaps in existing data offerings?" Addressing and/or explaining gaps in organic AMS Market News data and including more geographic granularity would improve on the main issues we heard specific to AMS Market News organic data from research participants and could increase their use among businesses across the organic agrifood system in California. Expanding the specific commodities with organic versions included in AMS Market News was seen as essential for many of California's organic producers and processors to consider the data useful for their operations. Further, including additional analysis and explanation of trends in the data would make them more useable for stakeholders, many of whom are interested in leveraging additional data to make longer-term business decisions.

Where possible, AMS should improve the consistency of their data collection for organic products already being tracked. Where the gaps stem from lack of supply in the actual organic market, this should be clearly noted in the data. Data accuracy is the most important aspect of an ideal organic price and volume data source for our survey participants from all market segments. At the same time, this is the aspect of AMS Market News organic data with which distributors and processors familiar with the data expressed the most dissatisfaction. The most consistent accuracy-related issue with AMS Market News organic data that we heard in our interviews with California stakeholders is repeated gaps in the data. In one case, the data gaps are during their peak season and directly impacted a pitch to investors to help expand their business. Expanding data collection such that these gaps are not present in future data would increase the accuracy of the data and improve users' confidence in them. Another interviewee somewhat sympathetic to there being gaps in the organic data, noted that sometimes organic products are just unavailable, but still discussed the gaps as a major barrier to using the AMS Market News organic data. Thus, including an explanation of why each data point is missing when gaps in reporting are unavoidable would help bolster perceptions of data accuracy.

Increasing the geographic granularity of the data would also help improve satisfaction with AMS Market News organic data. Satisfaction with the geographies covered by AMS Market News organic data is lowest among producers who find geographies covered important and essential for using an ideal source for organic price and volume data. Some interview participants also expressed explicit interest in having data more local to them; one specified the West Coast, another wants data from every state, another retailer tracks consumer packaged goods specifically for Northern California through the SPINS database.

Increasing the geographic granularity of AMS Market News organic data would also address concerns we heard about the unique economic context of California making pricing data from outside the state less relevant for California stakeholders, especially producers and retailers. In some cases, this concern extends to economic variation within the state. Several interview participants discussed the market context in California being unique. While explaining the importance of considering transportation costs and their impact on commodity prices, one producer we interviewed mentioned that the additional regulations in California make data from other states unrelatable. Others noted that the high cost of living in California affects pricing, and others noted this cost-of-living variation within the state yields broad variations in produce costs in different areas of the state.

The consistent use of localized price comparisons to track market prices for organic products among California's organic agrifood stakeholders also supports the need for more geographic granularity in AMS Market News organic data. We heard from retailers with employees who regularly review prices at other local grocery stores, from producers who rely on prices at their local food co-op or local food retailer to track market prices for their products, and we heard from other producers who compare the prices they receive from brokers with their neighboring producers. More generally, we heard a consistent reliance on informal information sources, like phone calls with market contacts, customers, and colleagues, throughout our interviews. These calls allow interviewees to gather information specific to their local area and/or the specific markets they are in. The location- and market- specific information these conversations and price comparisons provide are often helpful for stakeholders in setting and evaluating prices, tracking the market more generally, and making other business decisions. Our survey data demonstrate that the use of informal information sources, both generally and when setting or evaluating prices, is widespread among the organic agrifood stakeholders that responded to our survey. Producers, distributors, processors, and retailers are all more likely to use informal data sources, like information from their own businesses and from others in the organic supply chain, than to use AMS Market News organic price and volume data (Table 4.1). Distributors are the most likely market segment to use AMS Market News organic data (Table 4.1), including when making pricing decisions (Table 7.1).[21] But overall, survey respondents more often use individual observations and/or conversations than organic price and volume data when setting or

[21] This is especially noteworthy given the influential role of distributors in setting prices in the marketplace.

evaluating prices (Table 7.1). And they more often use information from a counterpart in a sale or others in their network, or data their own organization tracked, as compared to organic price and volume data, as a resource when negotiating a fairer price (Table 7.1).

AMS should also increase the number of agricultural commodities for which organic data is tracked in AMS Market News. While over 1,000 agricultural and livestock commodities are included in the AMS Market News reports, data for the certified organic versions of these items are included for just 200 of these commodities as recently as 2023 (USDA Agricultural Marketing Service, 2023a). Our survey and interview results suggest that California organic agriculture stakeholders, especially producers, want more data on various specialty crops and livestock products, including dairy and eggs. For example, our importance-satisfaction analysis shows that producers rank the importance of which products were covered in an ideal data source notably higher, on average, than they rank their satisfaction with AMS Market News organic data on this aspect (Figure 5.2). And about a third of producers, distributors, and processors, as well as half of retailers, report major specialty crops as the most useful product category for which they would like to see more organic data (Table 6.1). More than half of retailers are also interested in more organic data on livestock and/or poultry, and dairy and/or eggs (Table 6.1).

These interests in additional specialty crops and animal product-related data are also demonstrated in our interviews, especially with producers and retailers. For example, one mid-sized producer feels that their products are not included in AMS Market News organic data because the data focus on commodities rather than the “restauranty” items they grow. A review of the data during our interview confirmed that the specialty varieties of cabbage and eggplant they grow are not included in the data. Other producers mentioned they would benefit from easy access to average price metrics for the specific specialty crops they grow. Several retailers mentioned interest in having access to a database similar to SPINS but for fresh products, like produce, meat, seafood, dairy, and eggs.

For a full consideration of what additional organic products should be included in AMS Market News, the data team at AMS should review our list of organic products most in need of more price and volume data as reported by our research respondents (Table 6.3). In an open response question on our survey, we asked people to report the top three specific items for which they would like to see more organic data. Results from this question are shown in Table 6.3 and demonstrate specific interest in citrus, livestock/poultry/dairy products, nuts (especially walnuts), grapes, stone fruit, olives, avocados, and tomatoes. Many other items were mentioned via this question, but these are the most consistently mentioned. A few searches of the AMS Market News database located on MyMarketNews reveals that at least some organic pricing data are already available for several of these specific items, like lemons (the most common citrus mentioned), avocados, peaches (the most common stone fruit mentioned), and tomatoes. However, the data team at AMS would be best suited to fully consider which of these items lack

organic information in their data products, and what types of organic data could be added to support the need for additional data on these items expressed by the California organic agrifood system stakeholders we heard from in this research.

In considering what additional organic products to include in AMS Market News, AMS should also consider what data might help reduce barriers to transitioning to organic or other sustainable agricultural production practices. For example, one processor we talked to is motivated to help oat producers transition to more sustainable/regenerative growing practices by incorporating millet into their crop rotations. As a processor, they hope to develop additional markets for millet. However, they argue that a lack of data on organic millet prices make it more difficult for farmers to get crop insurance for millet, and therefore more averse to growing it regularly. They specifically noted that increasing AMS Market News organic data on prices of millet would help farmers more comfortably adopt the more sustainable practices of rotating millet with their oats. Another example comes from a beef processor and producer that use USDA reports on conventional live cattle to help set prices. They feel there is a lack of information available in the "regenerative slash organic space," though they are more specifically interested in regenerative. To the extent that AMS is charged with supporting farmers' transitions to organic (and/or emerging sustainable growing systems like regenerative), these types of data needs should be considered in addition to data needs for organic products that are already widespread in the marketplace.

Including more contextual and explanatory information on trends in price and volume for organic commodities would also better meet the needs of California's organic agrifood system stakeholders, many of whom are interested in and/or already using data to help them predict future market trends. For example, a small grocery retailer also talked about wanting more information to help them estimate when certain products might hit the retail market in a given year; this would help them plan their own inventory expectations better. A processor shared with us that having details on the root cause of price fluctuations could help them better negotiate for fairer pricing with their customers. Similarly, a large feed and seed producer wants a better understanding of how transportation costs impact pricing data reported on AMS Market News in order for the data to be more useful for them.

This focus on trend information and explanation is also consistent with how stakeholders are already using AMS Market News organic data and making pricing decisions. Our respondents are already using USDA data to estimate or track overarching trends in organic products. For example, one distributor we talked to uses USDA data to make reports for investors, a useful tool for business growth. Another distributor uses USDA data to get a bigger picture of the market and do research. Our survey data also show the limited use of AMS Market News organic data to set prices. Instead, more stakeholders report using these data for evaluating market conditions, including identifying market trends and tracking price patters, evaluating the fairness of organic

product prices, and making purchasing decisions (Table 5.2). While research respondents seem more interested leveraging data to predict market trends than set prices, our finding that market pressures often impact price setting and pricing decisions suggests that these market trends and predictions likely impact pricing decision indirectly. Nonetheless, these interests remain important for considering where it would be most effective to improve and/or increase AMS Market News organic data. Based on these findings, additional explanation of organic product price trends would help California organic agrifood stakeholders.

Additionally, stakeholders largely seem satisfied with how they currently make pricing decisions and/or are uninterested in using organic price and volume data to make pricing decisions. This suggests that a focus on data trends in addition to simple price and volume data points may resonant more with California's organic agrifood stakeholders. Several interviewees use what one processor called a "cost plus program" to set prices: setting prices to cover their own business expenses with some margin. Some retailers operate with the goal of matching "conventional industry margins" while others focus on a specific margin they met overall, with some variation to adjust to market conditions. Other interviewees are confident relying on their own experience and/or relationships, tailored to the products and geographies they work with regularly, to make pricing decisions. And some research respondents feel they have little or no control over prices, like the producers we interviewed that work with brokers, and some of the small grocery retailers we talked to who feel their main option for rejecting a high price was to refuse to purchase the product. Our survey findings highlight this as a somewhat more widespread feeling; 23% of producers (mainly those selling through intermediate sales channels) reported not feeling like they could negotiate for a fairer price, as did 21% of retailers (Table 7.1).

Recommendation 2: Improve AMS Market News Organic Data Accessibility

In this section, we present our recommendations focused on the question "Should any other accessibility or access needs be addressed to improve use of AMS Market News data for organic industry stakeholders?" In some cases, our research respondents are interested in data that are already available through AMS Market News and are unaware of the resource. We also found a fairly widespread lack of familiarity with AMS Market News, including and especially the organic AMS Market News data. This suggests a need for increased accessibility and promotion of existing organic AMS Market News data. For example, developing and promoting an easier item-based search process may help stakeholders use existing data more easily, especially smaller operations with limited capacity and time. Additionally, including clearer explanation of terms used throughout the AMS Market News data, as well as overviews of the data collection process, would build trust in existing resources among stakeholders. This would also help address some of the interpretation and trend improvement needs that research participants expressed.

Developing a search process more tailored to new users of AMS Market News would likely help increase usage of existing and new AMS Market News organic data and features among California organic agrifood system stakeholders. As outlined in the previous section, many research respondents are interested in having additional data on organic items. However, some of these items are included in AMS Market News organic data already, suggesting a lack of familiarity with these data. In fact, over half of producers and retailers who took our survey are not familiar with AMS Market News at all (Table 5.1), and many of our interview participants are similarly unfamiliar with it. Simply promoting AMS Market News among California's organic agriculture supply chain, especially among producers and smaller retailers, could increase usage. While causality cannot be established in our analyses, the increased use of organic AMS Market News data among distributors (19%) and processors (18%) as compared to producers (9%) and retailers (7%) (Table 4.1) may stem from increased familiarity with the data source among those groups. Rates of having at least some familiarity[22] with AMS Market News organic data without using these data are more similar across market segments (ranging from 12% among producers to 26% among distributors) than are rates of not using these data and having no familiarity with AMS Market News at all (ranging from 22% among distributors to 62% among producers) (Table 5.1). Distributors and processors have much lower rates of having no familiarity with or use of AMS Market News than producers and retailers without having proportionally higher rates of having at least some familiarity and no use of organic AMS Market News data. But the increased use of AMS Market News organic data among distributors and processors may explain the disproportionality in familiarity rates. If this is the case, increasing familiarity with AMS Market News organic data could be especially impactful in increasing regular use of the data. But the simultaneous interest in and lack of familiarity with these data suggests that everyone would benefit from improved outreach about and accessibility of AMS Market News.

A new search process tailored to new users could function through users entering a single commodity item they want data on and being provided an overview of the data available for that item through AMS Market News. This structure is in line with what producers interviewed suggested, but a divergence from what is currently available on MyMarketNews. Our own review of MyMarketNews search options reveals other potential barriers for users not already familiar with the data structure and collection process. For example, users can "Search By Reports" or "Search By Market Types", but without familiarity with the reports and market types included in AMS Market News, it is unclear which of these searches will be most useful. Should a new user choose to search by reports, they can begin their search by entering the specific commodity they are interested in, but they are also required to select an option for "Report," "Report Section," "Report Year," "Report Begin Date," and "Report End Date," and there is no option to filter by organic. Including these as required options without providing more

[22] These percentages include those who reported they were slightly familiar, moderately familiar, very familiar, or extremely familiar.

information about them requires the user to already know what report would be most useful for them, and what timeframes are included in that report. If a user were to search by market type, the main search criteria they must decide on are market type, aggregation, and dates. While the drop-down menus for these main search criteria would likely clarify their meaning for most industry actors and this search option does include an organic filter, it is not immediately clear how to search for information for a specific commodity. Our research shows that products covered is an important aspect of an ideal organic price and volume data source among our survey respondents (Table 6.2). For our respondents, prioritizing products covered over timeframes or other details about the data (i.e., geographies, automation ability, or interpretation) would likely make the data more approachable for new users.

Including an additional "Search By Commodity" or similarly-titled search option could allow users to prioritize the item they want data for over the data details. While data accuracy was ranked of highest importance among our survey respondents when considering aspects of an ideal organic price and volume data source, products covered was also consistently rated as important and essential for data use. Existing research suggests that organic market data users seem to prioritize data relevance over quality; they use data that are relevant even when they are not confident in their quality (Home et al., 2017). Given that search options in MyMarketNews adapt to choices throughout the search process, starting an open search for commodities would help new users quickly determine what data are available through AMS Market News for their products. Using the current search functions could mislead some to think their products are not covered by AMS Market News if they choose a report, market type, and/or time period for which their item of interest is not available. This is especially true for the current "Search By Market Type," likely because of the ongoing migration of some specialty crops data to the MyMarketNews tool. If a user is interested in movement and prices for strawberries, but first chooses movement as the market type, and drills down by commodity, strawberries are not currently included as an option and there is no indication on the search page as to why this is the case. A new user could easily conclude that data on strawberries are not available at this source without choosing to search for any pricing data, where they would find data on strawberries available. A search criteria that prioritized commodity first (like in "Search By Reports"), with filters for market type, timeframe, and organic (like in "Search By Market Types"), would likely be more accessible and therefore available to our research participants. Additional details (provided in Table 6.2 of this report) on how important different aspects of ideal price and volume data are could further inform which search criteria should be prioritized.

Increased explanation of terms and data collection, as well as an overview of how to use MyMarketNews and other data tools, would also make AMS Market News organic data more accessible to California organic agrifood system stakeholders. Several of our interview respondents asked about how the AMS Market News data are collected. Others expressed frustration about gaps in the data that might be addressed with explanation about why those gaps

exist. And others want to know how market pressures are affecting the data, a concern that may again be addressed by AMS by providing additional information about how the data are collected and aggregated. These are tangible difficulties in using AMS Market News data among our research participants but are also given as reasons for not using AMS Market News organic data at all.

Including additional explanation of AMS Market News data and tools may also encourage increased use of the data among stakeholders more generally. Our own short review of MyMarketNews suggests that definitions of terms like "market type," details on data collection practices, instructions for accessing the data through non-automated methods, and explanations of missing data were all lacking. And while our research respondents are all insiders within the organic agriculture supply chain, without familiarity with AMS Market News, they may need an introduction to the data to trust them and understand how they could use them in their own businesses. In one review of organic market data quality, Home et al. (2017) find that, for the most part, the less focus on the data quality a source had, the less accurate users of those data found them to be. Here, perceptions of data accuracy and availability may be easily improved through including additional explanation of search terms, data collection practices, and data tools available through AMS Market News. For best results, these items should be included and made easily accessible on all AMS Market News public-facing websites.

Recommendation 3: Update AMS Market News Organic Offerings to Match Competitors

In this section, we present our recommendations focused on the question "How can AMS Market News better provide data that is currently provided by other sources, including paid services, to better serve organic industry stakeholders?" Our research respondents regularly use organic price and volume information provided by non-AMS Market News sources. Examples throughout our research of these other data sources help identify some additional aspects of AMS Market News that could be updated to improve usability and expand use among California's organic agrifood system stakeholders, mainly: improved visualizations, increased promotion, and more tailored content. AMS should consider developing more visualizations of organic commodity data and leveraging email promotions to boost awareness among California organic stakeholders of new and existing AMS Market News data resources. Building more tailored, segment and/or commodity-specific access points for existing data resources may also help match the utility of other data sources in the market.

While many of our research participants rely on informal data sources for assessing market details, some also rely on and/or referenced market data from more formal sources, like aggregated databases and industry reports. For example, a spice distributor we talked to gets price and volume data for some of their products from the American Spice Trade Association. A produce distributor who described relying heavily on conversations with customers and industry

contacts for market information also later suggested the Organic Produce Network's regular market reports and emails as a model of a useful market information source. A tree-fruit distributor talked about the regular use of data portals various companies have developed that rely heavily on USDA data but that have created their own visualizations and graphs that make the data more usable. And retailers often use the SPINS database, a database aggregating market information for consumer packaged goods sold in participating retail stores.

Finding that USDA data are already being leveraged in the marketplace with improved visualizations points towards the need for continued improvement of the data interface within AMS Market News itself. Additional visualizations of organic data would improve AMS Market News offerings and address concerns several interviewees have about the data being somewhat cumbersome to work with. The present study also identifies some specific aspects that these visualizations would benefit from. Our research respondents mostly prefer to access organic price and volume data through visualizations of individual data points with some explanation (Table 6.1) and trend information (expressed in interviews). While our respondents mostly prefer standardized and/or static visualizations, AMS should also consider developing interactive visualizations. The preference for static visualizations over interactive ones likely stems from interactive visualizations still being an immerging data presentation format; many of our survey respondents may simply be unfamiliar with them. But interactive visualizations would allow users to tailor the data presented to their needs, whether that relates to products they want included, geographic areas they are more interested in, or time frames they may want to explore.

Many of the other data sources referenced by our research participants, like the Organic Produce Network, also deliver information updates via email on a regular basis. While regular email updates specific to AMS Market News organic data may be useful, our finding that AMS Market News lacks familiarity among our survey respondents suggests that additional outreach and/or promotion of AMS Market News organic tools may also be useful. Our survey responses about an ideal data source also indicate that emails are strongly preferred among all market segments. There was variation by market segment in how often they are interested in data updates; producers and distributors mostly prefer weekly updates, but retailers mostly prefer monthly updates, and processors are more interested in seasonal updates (Table 6.1). These variations suggest that weekly updates may be a good default, but that allowing listserv participants to choose how often they would like updates delivered may be more ideal.

AMS should also consider developing more tailored experiences for their data tools, whether this be through the use of landing pages, search functions, customized email updates, or a customizable application. A data experience tailored to the individual user is a benefit provided by other information sources our respondents mentioned that AMS Market News largely does not currently provide. Informal data sources, heavily relied upon among our research participants, are also very tailored to the market and geographic needs of each individual. Given

the wealth of data features and reports currently included in AMS Market News, pointing specific groups towards a sub-set of the data and tools available could help reduce some of the confusion our research participants expressed in accessing AMS Market News organic data. Creating landing pages or email updates with information specific to the various commodity subgroups already used to classify AMS Market News data would help stratify the information for users. A web or smartphone application could go even further to allows users to "subscribe" to get data updates on specific products and locations of their choosing, like wholesale strawberries in San Francisco. Users could choose how often they wanted to receive updates on the data and how they would like to receive those updates (via email, via push notification, etc.). This application could also provide users a personalized dashboard with their subscribed items listed along with references to other information sources related to the items they already track. This or other more tailored experiences could also provide an opportunity to refer users to sources for additional information (including sources outside of USDA, where appropriate) on topics some of our respondents expressed interest in, like regulatory updates.

Conclusions

In partnership with AMS, the present study explores the gaps in price and volume data needs among stakeholders in California's organic agrifood industry, including organic producers, distributors and wholesalers, processors, and retailers. Data we collected on knowledge of existing data sources, including AMS Market News, suggest that market data use is widespread among stakeholders in California's organic agrifood supply chain. Many research participants use multiple methods to keep track of market prices. But direct use of AMS Market News organic data is less common than information from informal sources, like conversations with industry contacts, price comparisons, or other first-hand data collection. Familiarity with AMS Market News organic data is also relatively low among our research participants who are not already using AMS Market News as a data source. When AMS Market News organic data are used, it is often to evaluate market conditions or track longer-term trends that impact business decisions around purchasing and harvesting volumes or planning for the future of the business. But interview respondents familiar with AMS Market News organic data talked mostly about its limitations.

We found some specific areas where AMS Market News organic data may be falling short for our research participants: data accuracy and consistency, geographies and products covered by the data, and data presentation and dissemination. Our survey respondents ranked their satisfaction with the accuracy of AMS Market News organic data as lower than other aspects of the data, while reporting that data accuracy is extremely important for their use of an ideal organic market data source. Interview participants also complained about frequent gaps in AMS Market News organic data that make them difficult to use; the presence of these gaps negatively impacted respondents' view of accuracy. Overall, research participants want more data specific to California and its various sub-regions, and they want more information on major specialty crops (especially citrus, nuts, grapes, stone fruit, olives, avocados, and tomatoes) and livestock/poultry/dairy products (like beef, poultry, pork, dairy, and eggs). We also heard repeated calls for data on organic items that are already included in AMS Market News; this suggested a general lack of familiarity with the data source among many of our research participants. Both of these issues could be addressed with improved data presentation and dissemination strategies on the part of AMS Market News. Ideally, our survey respondents want visual presentations of individual data points that include at least some explanation and have regular updates delivered via email and accessible on a website.

For the most part, formal data sources, including AMS Market News, are not a main consideration when setting prices among the organic industry stakeholders who participated in our research. The ability to cover business expenses, information from informal sources, and negotiation skills are consistently identified as important influences in pricing decisions and negotiations. Another common theme that emerged in our interviews centered on the impact of external market pressures on pricing decisions. Many processors and retailers also rely on their

own experience when setting or evaluating prices, especially when purchasing raw agricultural products.

Our research findings point toward specific recommendations for improving AMS Market News for California's organic agrifood industry. To improve AMS Market News organic data, we recommend making stronger efforts to avoid gaps in organic data and providing clear explanation of existing data gaps. AMS Market News organic data should also be expanded to include additional specialty crops, analyses, and data trend explanations. AMS Market News should be made more accessible by having an easier item-based search process, clearer explanations of terms, and overviews of data collection processes. Developing more visualizations of organic commodity data would help AMS Market News remain relevant and more useful among formal organic market data offerings, as would email promotions of AMS Market News organic data and regular email updates for available data.

Current AMS Market News organic data could be improved and increased to fill gaps in existing data offerings highlighted in our research findings. Improving the consistency of AMS Market News organic data collection would address concerns about gaps in these data and very likely help improve perceptions of its accuracy among California organic agrifood stakeholders. Where data gaps stem from volatility in the actual organic market, clearly noting this in the data would promote trust of AMS Market News as an organic market data source. Increasing the geographic granularity of the data, as well as the variety of items for which organic data are tracked, would also help improve satisfaction with AMS Market News organic data among our research participants. For a full consideration of what additional organic agricultural commodities should be added, we have included a list of organic products our research participants said are most in need of more price and volume data in Table 6.3 above. Including more information on price and volume trends for organic commodities would also better meet the needs of California's organic agrifood stakeholders; many of our research participants are interested in and/or already using data to help them predict future market trends.

Increasing accessibility and promotion of existing AMS Market News organic data could address the lack of familiarity with this resource and the specific organic data already available through it. Developing a search process more tailored to new users would likely help increase usage among California organic agrifood stakeholders. This search process could function through users entering a single commodity item of interest and being provided an overview of the data available for that item through AMS Market News. This would allow users to prioritize the item they want data for over the data details currently prioritized in the MyMarketNews search tools. Increased explanation of terms and data collection may encourage increased use of the data, and an overview of how to use the tools available through AMS Market News would also make the data more accessible to California's organic agrifood stakeholders.

We heard several examples throughout our research of useful formal organic price and volume data sources other than AMS Market News, like aggregated databases and industry reports. These examples help identify some additional aspects of AMS Market News organic data that could be updated to improve usability among California's organic agrifood stakeholders. In some cases, USDA data are already being used by companies that develop easily accessible visualizations with the data and sell access to these visualizations. This points towards the need for continued improvement of the data interface within AMS Market News itself. Other industry data sources, like the Organic Produce Network, deliver information updates via email on a regular basis. Similarly, regular email updates specific to AMS Market News organic data may be useful, as would additional email outreach and/or promotion of AMS Market News organic tools. A more individually-tailored experiences of market data is another common feature of other formal data sources that AMS Market News largely does not currently provide.

These findings and subsequent recommendations represent the perspectives of our research respondents, who make up a subgroup of California's organic agrifood stakeholders: for producers, mostly smaller-scale operations focused on specialty crops (especially vegetables, fruit, and nuts) and often majority-owned by people from historically disadvantaged groups. While we included as much of California's organic agrifood industry as possible in our outreach, drawing from multiple sources of organic registrants and industry contacts, our respondents as a group are not wholly representative of California's organic agrifood industry overall, nor of the organic agrifood industry across the United States more generally. These results are, therefore, limited by who chose to participate in our research and should be interpreted with some caution. At the same time, because of who chose to participate, this report may disproportionately focus on the voices of California's organic stakeholders who have historically been, and often remain, overlooked in research studies like this one. As such, we hope that this report serves as an important addition to other research findings and work in this area.

Appendix A: Research Design

Interview Script and Survey Development

Our interview script was modeled after the interview script developed by our counterparts at University of Wisconsin – Madison. We shifted some questions to the survey that felt more appropriate for that data collection method (e.g., “what specific organic products would you like to have more data on?”). We also included a broad range of follow-up questions to elaborate on the information we were interested in gathering with each question. We created separate sets of questions for each segment of the industry that we wanted to talk with: producers, distributors, processors, and retailers.

We started our survey development with the farmer survey and adapted this survey for other industry segments. To gain a picture of what types of organic farms were taking our survey, we reworked farm detail questions from previous surveys of organic farmers in California that Dr. Galt had conducted: two different surveys (in 2010 and 2013) of farmers doing direct to consumer sales through Community Supported Agriculture programs and a 2021 California direct market farmers survey. The questions included details about what they grew and how much land they managed. We also included questions about farmers’ agroecological practices, the options for which were adapted from Liebert et al.'s (2022) study of how farm size affects the use of agroecological practices and Wezel et al.'s (2014) review of agroecological practices, and condensed based on our own experience. We also included questions about labor practices and pay that were adapted from Guthman's (2004) work considering the treatment of farm workers in organic agriculture in California. We asked these farm detail questions in two separate sections, with the more sensitive/administrative questions included at the end of the survey, like how long the farm had been certified organic, how big the farm was in terms of annual sales, and whether the farm was majority owned by people from historically disadvantaged groups. These sections underwent the most transformation when being adapted to other industry segments; the structure of questions about acreage farmed and crops grown needed notable changes to be more focused on organic commodities worked with. The focus remained on understanding how the business engaged with organic products throughout the supply chain, as well as the business scale and operating practices.

For our questions on data use, data needs, and pricing decisions, we started with a consideration of our research questions. We relied on personal experience with different ways of engaging with data to develop questions that would tease apart what aspects of existing data were working best for survey participants. Home et al.'s (2017) research on the quality of organic market data also informed our understanding of data access challenges, some of which we asked about in the survey. Schahczenski and Post's (2019) article for the National Center for Appropriate Technology on organic pricing broadly informed our questions on pricing decisions, and more directly informed our list of data sources we asked respondents whether or not they used. Findley

and Vélez's (2021) report on the research needs of California organic farmers also informed our question development for this section on data use and needs. These questions went through several rounds of review, both among our own team and with our partners at AMS. Questions and section structure were adapted based on each review. Ultimately, these questions became three distinct sections. One section focused on the data sources people used and how they used and accessed them, as well as their familiarity with and thoughts on AMS Market News. A second section focused on the nuances of respondents' ideal source for organic price and volume data, including what they would like included and how they would like to access it. And a third section focused on pricing decisions, including what information people used when making pricing decisions and/or negotiating pricing and how much control over pricing decisions people felt they had in different types of market transactions. These sections looked very similar in surveys for each industry segments (distributors, processors, and retailers), but references to farming and selling versus buying organic products were adapted as needed.

Lastly, we included a section on individual demographics near the end of the survey. We included questions here about how long the survey respondent had been farming, how long they had been engaged in organic, and more typical demographic questions like age, gender, and race/ethnicity. We followed the 2023 Recommendations on the Best Practices for the Collection of Sexual Orientation and Gender Identity Data on Federal Statistical Surveys from the Office of the Chief Statistician of the United States to word our question about gender (Office of the Chief Statistician of the United States, 2023); we did not include a question about sexual orientation because we felt it was not relevant to the current study and that some respondents may find it too sensitive to continue the survey. We included a single question asking about race and ethnicity together, following the recommendations of the 2023 Initial Proposals for Updating OMB's Race and Ethnicity Statistical Standards from the United States Office of Management and Budget (US Office of Management and Budget, 2023). This section also underwent minimal adaptation for the non-farmer surveys; references to the respondents' farm were updated to reference their business and/or organization as appropriate.

We also reviewed our surveys with a colleague with expertise in preventing survey fraud and included several related suggestions in our survey (Pinzón et al., 2023). These included collecting IP addresses, browser and devise information, and information on where each respondent had accessed the survey from. We also included several open-ended questions with additional encouragement to complete them. We also tracked the time it took respondents to complete each page of the survey and used several available fraud tracking tools from Qualtrics, including Bot Detection, Security Scan Monitoring, and RelevantID (those three specific items were turned on when we became aware of them on February 29th, shortly after we started data collection). Together, these added bits of information allowed us to detect and evaluate suspected fraud, though no major instances of fraud were identified. This was particularly relevant to this survey because of the $40 incentive we included for each early respondent.

One major step we took to avoid survey fraud was to have our recruitment Bit.ly links direct people to a UC Davis Agricultural Sustainability Institute landing page that was not indexed by Google and therefore not easily searchable online. On each survey, we collected information about where people were directed to the survey from (i.e. what web page they were on when they clicked on the link to our survey). This allowed us to verify that respondents were accessing the survey through expected channels. We had been advised that survey fraudsters (AI or human) often avoided this step, using the direct survey link to save time and effort. Had the survey been posted to social media or other publicly available spaces where survey fraud often starts, we likely would have seen people navigating to the survey from sites other than our UC Davis landing page. All completed survey responses were directed to the survey from this landing page or from an individualized link shared via email.

We also included a question at the end of our survey that allowed respondents to provide feedback on our survey. We reviewed this feedback as the data collection began to ensure that any confusions were addressed. Most of these responses were concerned about the survey being lengthy, which we did not address. However, a couple changes became evident as of late February that we did address. On February 27th, we added clarity to our questions about whether the farm owners were part of historically disadvantaged groups; we specified that the person filling out the survey should include themselves in this question if they were one of the owners. We also caught an item in the processor survey that still referenced farming based on several responses to the feedback question for that survey; we properly updated this question to reference the respondent's business/organization on February 27th as well. No other issues became apparent from this feedback question as the data collection progressed.

Survey Recruitment

Survey Contact List Development

To gather lists of and contact information for organic producers, distributors and wholesalers,[23] and processors, we used the USDA's Organic Integrity Database (OID), the California Department of Food and Agriculture's (CDFA's) list of organic registrants, and the California Department of Public Health's (CDPH's) list of Organic Processed Product Registrants. These lists were gathered in October and November of 2023. The USDA's Organic Integrity Database was filtered to only show organizations operating in California and included information for

[23] Several of our contact information sources (including the USDA and CDFA) did not distinguish between distributors and processors. They instead defined these industry actors, along with other entities handling organic products in the agrifood supply chain between the farm and the consumer as "handlers." Where possible in our outreach, we identified distributors/wholesalers and processors by additional business information provided in the USDA Organic Integrity Database, or through reviews of the business name and/or information about the company available publicly online. However, it was not always possible to make this distinction. We therefore refer to these contacts as "handlers" when explaining our recruitment efforts here.

4,987 such organizations. The CDFA and CDPH lists only include businesses operating in California because of jurisdictional limitations. The CDFA list of organic registrants contained 5,285 organic producers, processors, and handlers; the CDPH list of organic registrants contained 2,809 organic processors, handlers, and distributors.

Of these sources, the USDA's OID list contained the most detailed information for organizations that had an organic certification. This list included information about the certifying organization, contact name, certification status of the organization (we only included those with a currently certified status), information about what the organic certification was for (crops, livestock, wild crops, or handling), what items were being produced under each type of certification, physical and mailing addresses, phone numbers, emails, and websites. Some of these fields (phone numbers, emails, and websites) had very high rates of missing data, likely because these categories were optional for organizations to provide. We did reach out to the National Organic Program to see if they could provide any additional data for these categories, especially email addresses, but were not provided any additional information.

We requested lists of organizations from CDFA and CDPH via a Public Records Act request to ensure we had the most updated information available for those registrant lists. Unfortunately, the information these departments were able to share with us was limited. While we requested business names, contact names, email addresses, mailing addresses, and phone numbers, CDFA provided only business names and addresses along with an indicator of whether the business produced and/or handled organic items. Similarly, CDPH provided only business names, addresses, and phone numbers, and indicated that email addresses were not considered public information under California law.

We combined these lists of producers, processors, and wholesaler/distributors and removed duplicate organizations. Because these lists each contained administrative data collected for different purposes, we relied on the assumption that some data would be reported differently for different organizations. For example, some organizations provided their "Doing Business As" (DBA) name along with another organization name to CDPH; other organizations' DBA name was included in the USDA's OID list. However, it was not clear which organization name was provided on the CDFA list (organization name or DBA name). Another variation stemmed from the addresses provided. We used the mailing addresses provided in the USDA's OID list, but it was unclear whether the addresses listed in the CDFA and CDPH registrant lists were physical addresses or mailing addresses. Further, formatting of names and addresses varied from list to list. As a result, we manually reviewed the list to remove duplicates.

We first sorted the list by addresses and removed any duplicate organizations based primarily on address. We considered anything close to identical as a duplicate (for example minor spelling or abbreviation differences were ignored in assessing duplication). Where duplicate addresses were

listed, we reviewed the additional information (organization name, DBA name, address, phone number, contact name, email address) to help identify duplicates. Where there was at least one other field of duplication, we removed one of the duplicates. When choosing which duplicate to keep, we prioritized the USDA's OID list because it contained the most complete information for organizations and because mailing addresses were specifically included. Where none of the duplicates were from the USDA's OID list, we next prioritized CDPH's registrant list because it contained the next highest level of business detail.

After reviewing the entire list focused on address duplication, we reviewed the list based on organization name with the same process. Organizations were treated as duplicates if the organization name was identical or near identical and there was at least one additional data field with duplication. The USDA's OID list, then the CDPH registrant list were prioritized in choosing which entry to keep. Next, we reviewed contact names in the same manner. Lastly, we separated out all DBA names and compared DBA names to organization names; again, where duplicates were clear, we removed less information-rich entries.

In our review for duplicates, it became clear that many organizations included in the list did work that was outside the scope of our research study because they were not directly involved in the food supply chain. For example, several organization names indicated that they produced pet food, fertilizer, cosmetics, seeds and/or seedlings, or were primarily focused on research rather than commercial production. We removed these organizations by searching for keywords that would identify each of these categories. For example, to identify organizations producing pet food, we searched organization names and DBA names for the keywords "dog", "cat", "pet", and "treat", reviewed each set of results, and removed organizations with names that were clearly focused on non-human foods.

Because retailers don't have the same organic certification requirements as producers or handlers of organic products, many entities selling organic products were not included in the USDA's OID list or the CDFA list of organic registrants. Some retailers' distribution operations were present on the CDPH's list of organic registrants, but many prominent grocery stores and supermarkets that sell organic produce were not included. As a result, we included additional sources to ensure that we reached a wide range of organic retailers, especially smaller-scale operations with less existing ability to make their interests known to USDA on their own. We first searched online (via Google) for food cooperatives across California and identified 16; we were able to identify addresses, phone numbers, and email addresses for all of these food cooperatives. The Independent Natural Food Retailers Association also provided us a list of their California-based retail members. This list included 78 retail partners and their addresses.

To augment these lists of likely-organic retailers, we also obtained a list of establishments that accept SNAP (the Supplemental Nutrition Assistance Program, formerly known as food stamps)

from USDA, which manages this program. While these retailers have no obligation to sell organic products, they do have an obligation to sell food items to be accepted by USDA as a SNAP retailer. We augmented with this list under the assumption that organic has become somewhat ubiquitous; most larger food retailers now sell at least some organic products. USDA provided store type information for this data, along with store name and address, geographic coordinates, and other details related to the SNAP program specifically. We were able to narrow down this list to the retailers most likely to sell organic products: grocery stores, supermarkets, super stores, and specialty stores. We excluded convenience stores, restaurants, farmers and markets (to avoid overlap with our other lists of producers), and those stores categorized as 'other'. The resulting list included 8,319 retail food locations across California.

To choose which of these SNAP retailers to include in our contact list, we first identified retailers that had names that indicated they sold produce or may be focused on products with organic or other similar certifications. We searched the SNAP list for retailers with names that included "produce", "fresh", "co-op", "cooperat", "local", "organic", and "natural", and included all these stores in our contact list. Next, we reviewed the SNAP list for stores with more than 25 locations in California and randomly selected three of their locations to include in our contact list. We supplemented this by including another 20 randomly selected SNAP retailers in our contact list. In this last step, we avoided any retailers with names indicating they may not regularly stock organic products, like liquor stores, corner stores and pharmacies.

In an effort to boost recruitment, we later investigated alternative sources for email lists, including the National Produce Blue Book, a database of businesses in the produce sector that contained emails and other contact information. This resource is geared towards connecting businesses for buying and selling produce; many of the emails and contacts included would likely be knowledgeable about the topics we were interested in. Our UC Davis library helped us gain access to this resource in early May. We searched this database for produce industry businesses in California with at least one email listed and who worked with organically grown produce. The business classifications included in our search were: buying office, canner, chipper, commission merchant, dehydrator, distributor, foodservice, freezer, fresh cut processor, jobber, juicer, packer, peeler, pickler, preserver, processor, receiver, repacker, restaurant, retail, wholesale, grocer, food hub, produce auction, sales office, shipper, produce broker, buying broker, and seller broker. This search yielded 186 businesses with 287 email contacts. We reviewed this list for duplicates from our overall contact list. We compared this full email list to our existing survey and interview outreach lists to remove duplicates. We included 253 new emails to our survey and interview recruitment lists. However, because we started our interview outreach with the main contact listed for each organization from this list, and ended our interview recruitment before reaching out to secondary contacts from this list, we only emailed 165 new contacts from the National Produce Blue Book database to request interviews while all 253 contacts were sent survey invitations.

Postcard Recruitment

Because the best contact information we were able to secure for farms and businesses in the organic agriculture industry was addresses, we decided that our main recruitment strategy would be through postcards. We included QR codes and web addresses on the postcards and were able to mail them to close to 7,000 farms and businesses. We did three rounds of postcards, starting with an initial invitation in mid-February 2024. We revised the text of the postcard to be more catchy for the second round, which was sent out in mid-March. The third round also used the revised postcards and was sent out in late April to align with the onboarding of our student assistant who did phone call recruitment to help boost response rates for the survey (see below for more details on phone call recruitment). Both postcard designs included information in English and Spanish. The QR code and links included on the postcard directed people to our landing page that included information for how to access each survey, included Spanish language text on accessing the farmer survey in Spanish.

Other Recruitment

Emails

We also emailed individualized survey links to organizations on the USDA OID list that included email addresses in their information. Initially, we only did email outreach for this group of organizations because it was the only list of organic businesses that included email addresses. Later, we sent email invitations to additional groups as we found additional sources for email addresses. These emails included individualized links to surveys, were sent directly from UC Davis Qualtrics, and could only be used once. These links directed participants directly to one of the surveys, rather than to our landing page that allowed them to choose for themselves which survey to complete. We, therefore, used other details included in the USDA OID data, like what products they were certified to produce and/or handle, to determine which survey we should direct them towards. Each survey also included a filter question that directed people to the most appropriate survey in case they were miss-directed. For organizations that appeared to be mixed-type from our review of the USDA OID information, we prioritized processors, then distributors/wholesalers above producers because we anticipated (correctly) a higher number of responses from producers than these other market segments.

The first round of email recruitment using the USDA OID list was sent in late February, about 10 days after our first round of postcards were mailed out. This round included 169 producers, 336 processors, and 86 distributors. Reminders were sent to valid emails where the recipient had not

yet completed the survey in late March; 139 reminders were sent to producers, 145 reminders were sent to processors[24], and 65 reminders were sent to distributors.

We later added additional emails to our survey recruitment strategy. The second round of email recruitment was to retailers for whom we had collected emails throughout the interview outreach process. We sent survey recruitment emails to 24 retailers in mid-March. We later also acquired and cleaned the email list from the National Produce Blue Book for California. We sent another 253 survey recruitment emails to these contacts in early May and sent 214 reminders to them in late May. It was challenging to identify which segment of the organic agriculture industry best fit many of these National Produce Blue Book contacts. Based on a review of the business classifications included in our search, we concluded that they were most likely to be processors. As a result, we sent all of these contact to the processor survey, and relied on our survey filter questions to redirect any non-processors to the most appropriate survey as needed.

Phone Calls

We also hired a student assistant to do phone call recruitment for survey participation. We provided a script with information about the research project and the survey, including what kinds of questions would be on the survey and who within an organization would be best to take it. The call list for this recruitment was a subset of the contact list used for the postcard recruitment. We included all grocery stores for which we were able to identify a phone number online. We used a Google search of each store name and address to identify a contact number. Most contact numbers were taken from the information for the store on Google, MapQuest, or Yelp (prioritized in that order; we took the information from Google if it was provided, then looked at MapQuest, then at Yelp). We were able to identify phone numbers for 378 retailers on our list. For producers, distributors/wholesalers, and processors, we included all businesses with a phone number included in our existing contact list. This included 1,225 producers and 2,690 handlers (distributors/wholesalers and processors).

The phone script included language for checking to see if businesses had already received our postcard and completed the survey. We also created another separate Bit.ly link to share with people over the phone who had not yet completed the survey. This will allow us to track this outreach method separately from the postcard outreach and conference recruitment discussed below.

[24] This lower number resulted from an error in using the Qualtrics email recruitment system. We did not initially input the processor emails correctly for the best email distribution performance; we separated them into two lists to keep the size manageable for the system. When we discovered how to combine them into one list, it was not clear to us that the email recruitment methods would not combine into one group as well. As a result, we lost tracking data for 154 processor recruitment emails and failed to send reminder emails to this same group. Throughout this document, our calculations for response and completion rates exclude this group for consistency, since the data is no longer available for even the first round of email recruitment.

From the full list of businesses and phone numbers, we also created subsets of businesses to call. We created 6 different sets, each containing 50 producers, 50 retailers, and 115 handlers that were randomly selected from the full phone lists. No duplicates were included; we ensured this by creating a column of random numbers with 10+ decimal places in Excel using the RAND() command. Phone contacts were then ordered by this new variable, and sets were chosen in this order to include in the sets. Once these sets were created, we ordered the included contacts randomly using the same method of using random numbers in Excel. Businesses were then contacted in this random order, by set so that a balance of business types were included in each round of phone calls.

We chose to include more handlers on each list because this group represented distributors/wholesalers and processors. At this point in the research process, it was clear that we were struggling to differentiate between distributors/wholesalers and processors among handlers with the information provided on our contact lists. We estimated from our survey responses that there were slightly more distributors/wholesalers than processors among those classified by CDFA, CDPH, and on the OID as handlers, so we chose to include slightly more than twice as many handlers than producers and retailers in each set of calls to ensure representation from processors.

Our student assistant began making phone calls on April 29th, and had called 467 businesses (our first two sets of business contacts and 37 businesses from the third set) by the end of May. In the first week of June, as we prepared to close the survey, our student assistant shifted their calls to focus exclusively on retailers in an effort to boost responses from this market segment. Our student assistant called an additional 41 retailers in early June. All together, they completed 508 calls between April 29th and June 7th. These calls, as well as onboarding and brief weekly check-ins, took them a total of 49.5 hours.

These phone calls revealed some limitations of our research approach when it came to retailers. The retailer information on the SNAP list were individual stores, as the list is geared toward SNAP participants looking for locations where they can purchase food with their SNAP dollars. However, it became clear in our calls that local store staff were rarely involved in setting prices or procuring products, and therefore ill-equipped to take our survey. Our student assistant making these calls was often referred to the corporate offices for retail chains. At the corporate level, we also learned that the staff responsible for procuring products was often different than the staff responsible for setting consumer prices for products, and often worked in an entirely different department with little interaction. Future work targeting these larger retailers should consider building separate surveys to understand the procurement and pricing strategies separately and concentrate recruitment on corporate offices. Because we were particularly interested in reaching smaller retailers where the store managers could often speak to procurement and purchasing, we were still able to gather useful information on organic retailers.

We also learned that several of the stores that we included in our contact list from the SNAP retailer list did not sell organic products at all, suggesting a different source and/or better filtering of the SNAP retailer list may have been useful. Staff at several of these stores were also non-English speaking, suggesting that a translation of our retailer survey, especially into Spanish, may have been useful, given our focus on California.

In-Person Networking

We also recruited survey participants at two conferences in January 2024: EcoFarm and the Sustainable Food Summit. While networking, we provided interested people with small fliers for the survey that included a QR code and Bit.ly link to our landing page that would further direct them to the appropriate survey. The fliers were printed in English on one side and Spanish on the other. EcoFarm also provided several bulletin boards where we posted our fliers, and fliers were included at the UCANR Organic Agriculture Institute table for interested people to take with them. The Sustainable Food Summit was a much smaller conference, with fewer networking opportunities, but we also handed out fliers while networking there. We collected business cards while networking, and later recruited participants through these contacts. Where appropriate, we asked these contacts to share our outreach materials with their own contacts who may find the study interesting and/or want to participate.

Engagement and Response Rates

The postcards included a link and connected QR code produced by Bit.ly to allow us to track engagement rates for the postcards independent from other outreach. Similarly, our phone calls used a separate Bit.ly link, and our in-person networking used a separate Bit.ly link and connected QR code. All of these links and corresponding QR codes sent people to our UC Davis survey landing page which included instructions in English and Spanish for how to access the surveys. Using this landing page allowed us to send the same Bit.ly links to different types of businesses; respondents were directed to choose the survey that most closely aligned with their role in California's organic agrifood system. Creating separate sets of Bit.ly links allowed us to track engagements with each recruitment method separately. Between mid-February and early June, our three rounds of 6,809 postcards generated a total of 274 engagements. In January, we passed out at least 30 fliers at two separate conferences but received no engagements from this recruitment method. Between late April and early June, we called 508 businesses and received 58 engagements. While our engagement rate for phone calls is much higher than for postcards, it is important to note that all businesses we called were also included in our postcard outreach. This 11% engagement rate for phone calls should be read as an 11% engagement rate for the combined outreach of postcards and phone calls (with the addition of emails in some cases).

Because Bit.ly links for postcards and phone calls all relied on the same anonymous links to direct people from our UC Davis landing page to the surveys, when considering how many of those engagements resulted in completed (or mostly completed) survey responses, we can only

consider response rates for both categories together. There were a total of 201 survey responses through these anonymous links that were at least 50% completed (10 retailers, 25 processors, 22 distributors/wholesalers, and 144 producers). About 61% of people who engaged with some form of our anonymous recruitment (postcards and/or phone calls) completed at least half of the survey.

Email recruitment was tracked separately and without the use of a Bit.ly link; we were able to manage this recruitment directly through Qualtrics with individual links being emailed to each address and tracked independently though Qualtrics. We sent a recruitment and reminder email to 714[25] addresses and received 50 engagements; our email recruitment response rate was about 7%. Of these 50 engagements, a total of 26 completed at least 50% of the survey (4 retailers, 9 processors, 5 distributors/wholesalers, and 8 producers).

Interview Recruitment

We used these same sources, supplemented with online searches for contact information, especially email addresses, to recruit interview participants. In the first round of interview recruitment, we gathered organization names and addresses from the USDA's OID list, CDFA's and CDPH's organic registrant lists, our online search for co-operative grocers, the INFRA membership list, and a Google search for other retailers we were familiar with operating across California. We randomly selected organizations from each list until we were confident we had at least 20 producers, 20 processors, 30 distributors and wholesalers, and 30 retailers. We included more retailers and distributors/wholesalers because we had more sources of information for these types of organizations. We randomly selected producers from CDFA's list of organic registrants and the USDA's OID list. We randomly selected processors from CDPH's list of organic registrants and the USDA's OID list. We randomly selected distributors and wholesalers from both CDFA's and CDPH's lists of organic registrants and the USDA's OID list. And we randomly selected retailers from our list of co-ops, the INFRA list, and our Google search of common California grocery stores. We then searched each organization and address on Google, and reviewed available resources, including company websites and Facebook pages, to identify email addresses and/or other contact information for each organization. For this first round of interview recruitment, we had a list of 22 producers, 46 distributors, 40 processors, and 32 retailers. In mid-December 2023, we emailed a total of 105 organizations, and filled out web-based "contact us" forms for 11 organizations.[26] Since these messages were sent close to the winter holidays, we followed up on emails we had not received a response to in late January 2024.

[25] We sent a total of 868 survey recruitment emails, but we were unable to track engagements for 154 of them due to a misunderstanding on our part of how Qualtrics tracked these numbers. To present the most accurate engagement rate in this table, we included only the 714 emails for which we had complete engagement information.
[26] Some organizations from this list were not contacted because we were unable to find email contacts for them. We later did phone recruitment for those for which we could find phone numbers.

Once we reached the second round of interview recruitment, we had completed our survey outreach contact list, which we were able to draw from for our interview recruitment. We randomly selected ten organizations identified as each of the following in our combined list: producers, distributors/wholesalers, processors, and retailers (including grocery stores, super store, supermarkets, and specialty stores). We also included ten organizations with some mix of types, like those listed as producer/handlers. We treated these mixed-type organizations as processors if processor was listed in the mix; otherwise, we grouped them with the first listed type. Once these organizations were added, we checked our updated interview contact list for duplicates and searched online for contact information for the newly-added organizations. In round two, we emailed 18 organizations and filled out online contact-us forms for another 9 organizations in early February of 2024. We sent follow-up emails to these organizations in early March of 2024.

In round three of interview recruitment, we changed how we categorized organizations for recruitment balancing across organization types. Our contact list identified both distributors and processors largely as handlers (USDA) or without a type designation (CDPH). For example, CDPH's organic registrant list contained only distributors/wholesalers and processors but did not include organization type information. We therefore combined distributors/wholesalers and processors in our interview contact list for ease of grouping and consistency across contact lists. In this third round, we randomly selected twenty producers, forty handlers, and twenty retailers from our contact list. We emailed 39 organizations and filled out online "contact-us" forms for another 9 organizations in late February of 2024. We sent follow-up emails to these organizations in early March of 2024.

In round four of interview recruitment, we contacted the remainder of the businesses in our contact list that we had email addresses already available for. This included 105 producers, 295 handlers, and 8 retailers. This method resulted in an over-sampling of handlers for this round of recruitment. This was appropriate at this stage of the research project because we were lacking interview responses from distributors and processors. While we were also lacking interview responses from retailers, we did not have a good source of retail contacts readily available to over-sample. In this round, we emailed a total of 408 organizations in mid-April of 2024. We sent follow-up emails to the handlers and retailers in late April and early May. Because we had reached saturation in our producer interviews, we did not follow-up with producers and no longer focused on producer recruitment for interviews in late April.

In early May, we did our last round of email recruitment for interviews by emailing 165 contacts from the National Produce Blue Book; these contacts were all handlers. We did not send follow-up emails to this group or reach out to secondary contacts from this source because we were wrapping up our data collection process by the time follow-ups would have been sent.

In early March through early May, we also used phone calls to recruit for interviews. We made a total of 31 phone calls, mostly to handlers, which yielded 2 interviews (one with a processor and one with a retailer). We first called organizations included in our first through fifth rounds of interview outreach for whom we did not have email addresses but did have phone numbers. We later also called contacts with undeliverable email addresses for whom we also had phone numbers.

In early May, we also reached out to everyone we had already interviewed, asking for referrals to others in their networks that might be willing to be interviewed for our project. We did get one contact through this method, but it was for a retailer that we had already interviewed. Others may have shared our contact information with their networks, but it did not directly yield any additional interviews.

At the end of our survey, we also asked participants to indicate if they were interested in participating in further research efforts, like interviews. If so, they were asked to provide their contact information. We reached out to the first batch of these survey participants to schedule interviews in late February and continued to reach out to new batches through early June. A total of 35 survey respondents expressed interest in participating in further research. Of those, we reached out to 20 and interviewed 7. These were mostly farmers, so was not the best source for reaching handlers and retailers that we were focused on reaching later in the interview process. Nearly all the 15 people we didn't contact from this list were farmers and all took the survey after late March, when we transitioned away from contacting producers for interviews.

Appendix B: Surveys

Organic Data Collection Gap Analysis Survey for Farmers

Part 1: Study Introduction and Consent to Participate

Q3 **Welcome!**
We invite you to take a survey on how organic farmers like you use **price and volume data and decide on fair prices** within the organic agriculture industry. Thank you for your participation in this research.

What's the purpose of this research?
The University of California, Davis, Agricultural Sustainability Institute is conducting research to gather information on how famers and businesses in the organic agricultural supply chain use information on product prices so we can make recommendations to the USDA's Agriculture Marketing Service (AMS) to improve its price collection process, website, and publications.

What are the survey questions about?
Our questions are about your farm, its role in the organic industry, what organic price and volume data you use when selling your farm's products and how you use it, what organic price and volume data would be most useful for your farm, and how you decide on fair pricing for your organic products.

How long will it take to complete?
The survey will take about 15-20 minutes to complete and is completely voluntary. You are welcome to respond to as many questions as you feel comfortable answering. You do not need to answer any questions you do not wish to. You can leave the survey at any time.

Will there be compensation?
The first 400 respondents will receive **a $40 Amazon e-gift card**. You must complete the survey to receive a gift card.

How will confidentiality be ensured?
The survey will ask for some personal information. **Responses will be anonymized prior to analysis and stored in a secure location**. Only the research team will have access to responses and personal identifiers. Any publications will not identify your answers by name or with any other identifying information. This research has been reviewed and approved by an Institutional Review Board (IRB). The IRB is a group of people who oversee research and help protect the rights and welfare of people who participate in research studies like this one.

Dr. Ryan Galt and Dr. Houston Wilson are Principal Investigators on this research, and the United States Department of Agriculture (USDA) provided the funding for this study. **If you have any questions or concerns, please reach out to our primary research contact, Dr. Katie Butterfield at (530) 752-5299 or** klcbutterfield@ucdavis.edu. If you have any questions or concerns about your rights as a participant of this survey, you may contact the UC Davis Office of Research at (916) 703-9158 or hs-irbeducation@ucdavis.edu.

Q3 **Bienvenido, bienvenida!**
Le invitamos a responder esta encuesta sobre cómo las y los agricultores orgánicos como usted utilizan **los datos de precios y volúmenes y deciden precios justos** dentro de la industria de la agricultura orgánica. Gracias por su participación en esta investigación.

¿Cuál es el propósito de esta investigación? El Instituto de Sostenibilidad Agrícola de la Universidad de California, Davis, está realizando una investigación para recolectar información sobre cómo los y las agricultoras y las empresas en la cadena de suministro agrícola orgánica utilizan la información sobre los precios de los productos, para poder hacer recomendaciones al Servicio de Comercialización Agrícola (AMS por sus siglas en Inglés) del USDA y así mejorar su proceso de recopilación de precios, su página web y sus publicaciones. **¿Acerca de qué son las preguntas de la encuesta?** Nuestras preguntas son sobre su granja, su papel en la industria orgánica, qué datos de volumen y precio utiliza cuando vende los productos orgánicos de su granja y cómo los usa, qué datos de volumen y precio de productos orgánicos serían más útiles para su granja y cómo decide poner precios justos para sus productos orgánicos.

¿Cuánto tiempo le tomará completarla? Completar la encuesta le puede tomar entre 15 y 20 minutos y es completamente voluntaria. Le invitamos a responder tantas preguntas como se sienta cómodo respondiendo. No es necesario que responda ninguna pregunta que no desee. Puede parar de responder la encuesta en cualquier momento.

¿Habrá compensación? Los primeros 400 encuestados recibirán una **tarjeta electrónica de regalo de Amazon por valor de 40 dólares**. Debe completar la encuesta para recibir la tarjeta de regalo.

¿Cómo se garantizará la confidencialidad? La encuesta le preguntará cierta información personal. **Las respuestas se harán anónimas antes del análisis y se almacenarán en un lugar seguro.** Sólo el equipo de investigación tendrá acceso a las respuestas y a los identificadores personales. Ninguna publicación identificará sus respuestas por su nombre ni con otra información que le pueda identificar. Esta investigación ha sido revisada y aprobada por una Junta de Revisión Institucional (IRB por sus siglas en Inglés). El IRB es un grupo de personas que supervisan la investigación y ayudan a proteger los derechos y el bienestar de las personas que participan en investigaciones como esta.

Los Doctores Ryan Galt y Houston Wilson son los investigadores principales de esta investigación y el USDA proporcionó los fondos para este estudio. **Si tiene alguna pregunta o inquietud, comuníquese con el contacto principal de la investigación, la Doctora Katie Butterfield al (530) 752-5299 o** klcbutterfield@ucdavis.edu.Si tiene alguna pregunta o inquietud sobre sus derechos como participante de esta encuesta, puede comunicarse con la Oficina de Investigación de UC Davis al (916) 703-9158 o hs-irbeducation@ucdavis.edu.

Q4 Clicking the consent button below indicates that you are 18 or older, are a farmer or farm manager who uses or could use USDA AMS organic price and volume data, are not an employee of the US Department of Agriculture, and consent to participate in the survey.

- Yes, I consent to participate in this survey (1)
- No, I do not wish to participate in this survey (2)
- I have already participated in this survey (3)
- I do not quality for this survey (4)

Q4 Al darle click en el botón de consentimiento a continuación, indica que usted tiene 18 años o más, es un agricultor(a) o administrador (a) de granja, que usa o podría usar datos de volumen y precio de productos orgánicos del Servicio de Comercialización Agrícola (AMS por sus siglas en Inglés) del USDA, que no es un empleado del Departamento de Agricultura de los Estados Unidos y que acepta participar en esta encuesta.

- Sí, doy mi consentimiento para participar en esta encuesta (1)
- No, no deseo participar en esta encuesta (2)
- Ya he participado en esta encuesta (3)
- No califico para esta encuesta (4)

Skip To: End of Survey If Q4 != 1

End of Block: Part 1: Study Introduction & Consent to Participate

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Part 2: Your Organization and Its Role in California's Organic Agriculture System

Q102 This section of the survey focuses on your farm / business / organization and its role in California's organic agriculture system.

Q102 Esta sección de la encuesta se enfoca en su granja/negocio/organización y su papel en el sistema de agricultura orgánica de California.

Q4 Which of the following best describes your primary involvement in California’s organic agriculture system?

- Farmer or farm manager (1)
- Wholesaler or Distributor (2)
- Processor that purchases raw agricultural commodities (3)
- Retailer (4)
- None of these (5)
- My involvement in the organic agriculture system is outside of California (6)
- I don't work with organic agriculture (7)

Q4 ¿Cuál de las siguientes opciones describe mejor su papel principal en el sistema de agricultura orgánica en California?

- Agricultor(a) o administrador(a) de granja (1)
- Comprador(a) al por mayor o distribuidor(a) (2)
- Procesador(a) que compra productos agrícolas no procesados (3)
- Vendedor(a) al detal/minorista (4)
- Ninguno de esos (5)
- Mi participación en el sistema de agricultura orgánica es fuera de California. (6)
- No trabajo con agricultura orgánica. (7)

Skip To: End of Survey If Q4 = 5
Skip To: End of Survey If Q4 = 6
Skip To: End of Survey If Q4 = 7

Display This Question: If Q4 = 2

Q5 Please proceed to our survey for organic wholesalers and distributors by following this link: Survey for Wholesalers and Distributors

Q5 Continúe con nuestra encuesta para mayoristas y distribuidores(as) orgánicos siguiendo este enlace:

Skip To: End of Survey If Q5 Displayed

Display This Question: If Q4 = 3

Q6 Please proceed to our survey for organic processors by following this link: Survey for Processors

Q6 Continúe con nuestra encuesta para procesadores(as) orgánicos siguiendo este enlace:

Skip To: End of Survey If Q6 Displayed

Display This Question: If Q4 = 4

Q7 Please proceed to our survey for organic retailers by following this link: Survey for Retailers

Q7 Continúe con nuestra encuesta para minoristas orgánicos siguiendo este enlace:

Skip To: End of Survey If Q7 Displayed

Q8 What best describes your role in your farming operation?

- Farm owner/operator (responsible for on-farm operations)
- An owning partner (not responsible for on-farm operations)
- A hired manager on the farm
- Someone with another relationship to the farm (please specify) _____

Q8 ¿Cuál de los siguientes enunciados describe mejor su papel en su operación agrícola?

- Propietario(a)/operador(a) de la granja (responsable de las operaciones en la granja)
- Socio(a) propietario(a) (no responsable de las operaciones en la granja)
- Administrador(a) contratado(a) en la granja
- Alguien con otra relación con la granja (por favor especifique) _____

Q9 How many people (including yourself) are involved in the management of your farm?

Q9 ¿Cuántas personas (incluido usted mismo(a)) participan en la administración de su granja?

Q10 How many acres is your farm? This should include acreage of all fields in your farming operation, including owned and rented/leased from others.

Q10 ¿Cuántos acres tiene su granja? Esto debe incluir la superficie de todas las parcelas de su operación agrícola, incluidos los terrenos propios y los alquilados/arrendados a otras personas

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Q13 Of the total acres in your farming operation, about how many acres are each of the following (if none please write a zero):

	Approximate number of acres
Owned by you or your business?	
Rented or leased from others?	
Certified for organic cropland?	
Cropland currently being transitioned to organic, but not yet certified?	
Cropland not certified for organic production?	
Rangeland or pasture certified for organic production?	
Rangeland or pasture being transitioned to organic, but not yet certified?	
Rangeland or pasture not certified for organic production?	
In field borders, grassed waterways, buffers, woodland, forest, or other areas associated with conservation practices but not cropland?	
Enrolled in the Conservation Reserve Program (CRP), the Wetland Reserve Program (WRP) or similar program?	

Q13 Del total de acres en su operación agrícola, aproximadamente cuántos acres pertenecen a cada una de las siguientes categorías (si no hay ninguno, escriba cero):

	Número aproximado de acres
¿Es propiedad suya o de su empresa?	
¿Alquilado o arrendado a otros?	
¿Tierras de cultivo con certificación orgánica?	
Tierras de cultivo que están actualmente en transición a orgánicas, pero aún no están certificadas?	
¿Tierras de cultivo no certificadas para producción orgánica?	
¿Tierras para pastoreos o pastos con certificación orgánica?	
¿Pastos naturales o sembrados que están en transición a orgánicos, pero aún no están certificados?	
¿Pastos naturales o sembrados no certificados para producción orgánica?	
¿Parcelas en los límites de la propiedad, vías fluviales con pasto, zonas de amortiguación, bosques u otras áreas asociadas con prácticas de conservación pero que no son tierras de cultivo?	
¿Parcelas inscritas en el Programa de Reservas de Conservación (CRP por sus siglas en Inglés), el Programa de Reservas de Humedales (WRP) o un programa similar?	

Q14 Of the certified organic acres in your farming operation, about how many acres are each of the following (if none please write a zero):

	Approximate number of acres
In berries?	
In citrus?	
In cut flowers?	
In forage?	
In grains and pulses?	
In nursery/seed crops?	
In nut crops?	
In pasture?	
In tree fruit (not citrus)?	
In vegetables?	
In vineyards?	
In other fruit crops?	
In other types of crops?	

Q14 De los acres con certificación orgánica en su operación agrícola, aproximadamente cuántos acres pertenecen a cada una de las siguientes categorías (si no hay ninguno, escriba cero):

	Número aproximado de acres
¿En diferentes tipos de berries/bayas?	
¿En cítricos?	
¿En flores de corte?	
¿En forraje?	
¿En cereales y legumbres?	
¿En viveros/cultivos para semillas?	
¿En cultivos de nueces?	
¿En pastos?	
¿En árboles frutales (no cítricos)?	
¿En verduras/vegetales?	
¿En viñedos?	
¿En otros cultivos frutales	
¿En otro tipo de cultivos?	

Display This Question: If Q14 "In berries?" Text Response Is Greater Than 0

Q17 Of the berries you grow, what one item do you grow the most of?

Q17 De las berries/bayas que cultiva, ¿cuál es la que más produce?

Display This Question: If Q14 "In citrus?" Text Response Is Greater Than 0

Q20 Of the citrus you grow, what one item do you grow the most of?

Q20 De los cítricos que cultiva, ¿cuál es el que más produce?

Display This Question: If Q14 "In cut flowers?" Text Response Is Greater Than 0

Q162 Of the cut flowers you grow, what one item do you grow the most of?

Q162 De las flores de corte que cultiva, ¿cuál es la que más produce?

Display This Question: If Q14 "In forage?" Text Response Is Greater Than 0

Q24 Of the forage you grow, what one item do you grow the most of?

Q24 Del forraje que cultiva, ¿cuál es el que más produce?

Display This Question: If Q14 "In grains and pulses?" Text Response Is Greater Than 0

Q23 Of the grains and pulses you grow, what one item do you grow the most of?

Q23 De los cereales y legumbres que cultiva, ¿cuáles son los que más produce?

Display This Question: If Q14 "In nursery/seed crops?" Text Response Is Greater Than 0

Q163 Of the nursery/seed crops you grow, what one item do you grow the most of?

Q163 De las plántulas de vivero/cultivos para semillas que cultiva, ¿cuál es el que más produce?

Display This Question: If Q14 "In nut crops?" Text Response Is Greater Than 0

Q22 Of the nut crops you grow, what one item do you grow the most of?

Q22 De las nueces que cultiva, ¿cuál es la que más produce?

Display This Question: If Q14 "In tree fruit (not citrus)?" Text Response Is Greater Than 0

Q18 Of the tree fruit (not citrus) you grow, what one item do you grow the most of?

Q18 De los árboles frutales (no cítricos) que cultiva, ¿cuál es el que más produce?

Display This Question: If Q14 "In vegetables?" Text Response Is Greater Than 0

Q16 Of the vegetables you grow, what one item do you grow the most of?

Q16 De las verduras/vegetales que cultiva, ¿cuál es la que más produce?

Display This Question: If Q14 "In vineyards?" Text Response Is Greater Than 0

Q19 Of the vineyards you grow, about what percent is each of the following?

	None at all	About 1-25%	About 26-50%	About 51-75%	About 76-100%
Wine grapes	O	O	O	O	O
Table grapes and/or raisins	O	O	O	O	O

Q19 De los viñedos que cultiva, ¿cuál es el que más produce?

	Nada en absoluto	Alrededor del 1-25%	Alrededor del 26-50%	Alrededor del 51-75%	Alrededor del 76-100%
Uvas para vino	O	O	O	O	O
Uvas de mesa y/o pasas	O	O	O	O	O

Display This Question: If Q14 "In other fruit crops?" Text Response Is Greater Than 0

Q21 Of the other fruit crops you grow, what one item do you grow the most of?

Q21 De los otros cultivos frutales que cultiva, ¿cuál es el que más produce?

Display This Question: If Q14 "In other types of crops?" Text Response Is Greater Than 0

Q15 Of the other types of crops you grow, what one item do you grow the most of?

Q15 De los otros tipo de cultivos que cultiva, ¿cuál es el que más produce?

Q26 Approximately how many crops within the following certified organic crop types do you produce over the course of a year? For example, growing kale, broccoli, cabbage, and potato would count as 4 vegetable crops.

Display This Choice: If Q14 "In berries?" Text Response Is Greater Than 0

- Berry crops _____

Display This Choice: If Q14 "In citrus?" Text Response Is Greater Than 0

- Citrus crops _____

Display This Choice: If Q14 "In cut flowers?" Text Response Is Greater Than 0

- Cut flower crops _____

Display This Choice: If Q14 "In forage?" Text Response Is Greater Than 0

- Forage crops _____

Display This Choice: If Q14 "In grains and pulses?" Text Response Is Greater Than 0

- Grain and/or pulse crops _____

Display This Choice: If Q14 "In nursery/seed crops?" Text Response Is Greater Than 0

- Nursery/seed crops _____

Display This Choice: If Q14 "In nut crops?" Text Response Is Greater Than 0

- Nut crops _____

Display This Choice: If Q14 "In tree fruit (not citrus)?" Text Response Is Greater Than 0

- Tree fruit crops _____

Display This Choice: If Q14 "In vegetables?" Text Response Is Greater Than 0

- Vegetable crops _____

Display This Choice: If Q14 "In vineyards?" Text Response Is Greater Than 0

- Vineyard crops _____

Display This Choice: If Q14 "In other fruit crops?" Text Response Is Greater Than 0

- Other fruit crops _____

Display This Choice: If Q14 "In other types of crops?" Text Response Is Greater Than 0

- Other types of crops _____

Q26 ¿Aproximadamente cuántos cultivos dentro de los siguientes tipos de productos con certificación orgánica produce en el transcurso de un año? Por ejemplo, cultivar kale, brócoli, repollo y papas contaría como 4 cultivos de hortalizas.

Display This Choice: If Q14 "In berries?" Text Response Is Greater Than 0

- Diferentes tipos de berries/bayas _____

Display This Choice: If Q14 "In citrus?" Text Response Is Greater Than 0

- Cítricos _____

Display This Choice: If Q14 "In cut flowers?" Text Response Is Greater Than 0

- Flores de corte _____

Display This Choice: If Q14 "In forage?" Text Response Is Greater Than 0

- Forraje _____

Display This Choice: If Q14 "In grains and pulses?" Text Response Is Greater Than 0

- Cereales y legumbres _____

Display This Choice: If Q14 "In nursery/seed crops?" Text Response Is Greater Than 0

- Viveros/cultivos para semillas _____

Display This Choice: If Q14 "In nut crops?" Text Response Is Greater Than 0

- Cultivos de nueces _____

Display This Choice: If Q14 "In tree fruit (not citrus)?" Text Response Is Greater Than 0

- Árboles frutales _____

Display This Choice: If Q14 "In vegetables?" Text Response Is Greater Than 0

- Verduras/vegetales _____

Display This Choice: If Q14 "In vineyards?" Text Response Is Greater Than 0

- Viñedos _____

Display This Choice: If Q14 "In other fruit crops?" Text Response Is Greater Than 0

- Otros cultivos frutales _____

Display This Choice: If Q14 "In other types of crops?" Text Response Is Greater Than 0

- Otro tipo de cultivos _____

Q106 Do you raise any certified organic animals (including for dairy or eggs)?

- Yes (1)
- No (2)

Q106 ¿Cría animales con certificación orgánica (incluyendo para lácteos o huevos)?

- Si (1)
- No (2)

Display This Question: If Q106 = 1

Q107 About how many head of each of the following did you raise and/or manage last year?

	For eggs or dairy	For meat
Cattle, including dairy cows		
Poultry		
Swine		
Sheep		
Goats		
Other animals		

Q107 ¿Aproximadamente cuántos animales de cada una de las siguientes categorías crió y/o administró durante el año pasado?

	Para huevos o lácteos	Para carne
Bovinos, incluyendo vacas lecheras		
Aves de corral		
Cerdos		
Ovejas		
Cabras		
Otros animales		

Q25 Which of the following agroecological/sustainable practices do you currently use on your farm? (choose all that apply)

- ☐ Intercropping
- ☐ Compost applications
- ☐ Other purchased organic/biofertilizer
- ☐ Drip irrigation
- ☐ Insectary planting/Hedgerows/Border planting
- ☐ Biological pest control
- ☐ Release of beneficial insects
- ☐ Organic pesticides
- ☐ Allelopathic plants
- ☐ Reduced tillage or no-till
- ☐ Cover cropping
- ☐ Crop rotation
- ☐ Riparian buffer
- ☐ Agroforestry
- ☐ Integration of animals into cropping systems
- ☐ Other agroecological practices (please describe) _____
- ☐ None of these

Q25 ¿Cuál de las siguientes prácticas agroecológicas/sostenibles utiliza actualmente en su finca? (elija todas las opciones que correspondan)

- ☐ cultivos intercalados/policultivos
- ☐ Aplicaciones de composta
- ☐ Otros fertilizantes/biofertilizantes orgánicos comprados
- ☐ Riego por goteo
- ☐ Plantación de insectarios/rompevientos/cultivos de bordes
- ☐ Control biológico de plagas
- ☐ Liberación de insectos benéficos
- ☐ pesticidas orgánicos
- ☐ Plantas alelopáticas
- ☐ Labranza mínima o labranza cero
- ☐ Cultivos de cobertura
- ☐ Rotación de cultivos
- ☐ Zona buffer ribereña
- ☐ Agroforestería
- ☐ Integración de animales en sistemas de cultivo
- ☐ Otras prácticas agroecológicas (por favor descríbalas) _____
- ☐ Ninguna de estas

Q26 How often do you use labor contractors?

- Routinely (a major segment of your operation is contracted most years)
- Occasionally (contractors are used on a more ad hoc basis)
- Never

Q26 ¿Con qué frecuencia usa contratistas laborales?

- Rutinariamente (un segmento importante de su operación se hace con contratistas la mayoría de los años)
- Ocasionalmente (los contratistas se utilizan si se necesitan (ad hoc))
- Nunca

Q27 Does your operation have full-time year-round employees?

- None
- Only family members
- 1-25% of our non-family workforce
- 26-75% of our non-family workforce
- More than 75% of our non-family workforce

Q27 ¿Tiene en su operación empleados(as) de tiempo completo durante todo el año?

- Ninguno(a)
- Sólo miembros de la familia
- 1-25% de nuestra fuerza laboral no familiar
- 26-75% de nuestra fuerza laboral no familiar
- Más del 75% de nuestra fuerza laboral no familiar

Q28 How is your typical field worker paid?

- Piece rates
- Piece rates with a minimum guaranteed per pay period
- Hourly, at close to $15/hour
- Hourly, between $16-18/hour
- Hourly, more than $18/hour
- Other (please specify) _____

Q28 ¿Cómo le paga a un(a) trabajador(a) de campo?

- o Por pieza/a destajo
- o Por pieza/a destajo con un mínimo garantizado por periodo de pago
- o Por hora, a cerca de $15/hora
- o Por hora, entre $16-18/hora
- o Por hora, más de $18/hora
- o Otro (por favor especifique) _____

Q30 Is your farming operation part of a business/organization that is also one or more of the following? (choose all that apply)

- ☐ Wholesaler
- ☐ Distributor
- ☐ Retailer
- ☐ Value-added processor
- ☐ Other actor in the organic agriculture supply chain (please specify) _____
- ☐ None of these

Q30 ¿Su operación agrícola es parte de una empresa/organización que también es una o más de las siguientes? (elija todas las opciones que correspondan)

- ☐ Mayorista
- ☐ Distribuidor
- ☐ Minorista
- ☐ Procesador de valor agregado
- ☐ Otro actor en la cadena de suministros de agricultura orgánica (por favor especifique) ___
- ☐ Ninguna de estas

Q31 About how much of your organic products does your business/organization sell using each of the following methods?

	None at all [1]	About 1-25% [2]	About 26-50% [3]	About 51-75% [4]	About 76-100% [5]
Sales to wholesalers or distributors separate from your organization (1)	O	O	O	O	O
Sales to value-added processors separate from your organization (7)	O	O	O	O	O
Sales directly to retailers separate from your organization (2)	O	O	O	O	O
Sales directly to consumers at farmers markets (3)	O	O	O	O	O
Sales directly to consumers through a community supported agriculture (or CSA) model (4)	O	O	O	O	O
Sales directly to restaurants (5)	O	O	O	O	O
Sales directly to institutions (schools, hospitals, etc.) (6)	O	O	O	O	O
Sales through other channels (9)	O	O	O	O	O

Q31 ¿Aproximadamente qué cantidad de productos orgánicos vende su empresa/organización utilizando cada uno de los siguientes métodos?

	Nada en absolute [1]	Alrededor del 1-25% [2]	Alrededor del 26-50% [3]	Alrededor del 51-75% [4]	Alrededor del 76-100% [5]
Ventas a mayoristas o distribuidores independientes a su organización (1)	O	O	O	O	O
Ventas a procesadores de valor agregado separados de su organización (7)	O	O	O	O	O
Ventas directamente a minoristas separados de su organización (2)	O	O	O	O	O
Ventas directamente a consumidores en las marquetas (farmers markets) (3)	O	O	O	O	O
Ventas directamente a los consumidores a través de un modelo de agricultura apoyada por la comunidad (o CSA) (4)	O	O	O	O	O
Ventas directas a restaurantes (5)	O	O	O	O	O
Ventas directas a instituciones (escuelas, hospitales, etc.) (6)	O	O	O	O	O
Ventas a través de otros canales (9)	O	O	O	O	O

Display This Question: If Q31 = 1 [2] Or Q31 = 1 [3] Or Q31 = 1 [4] Or Q31 = 1 [5] Or Q31 = 7 [2] Or Q31 = 7 [3] Or Q31 = 7 [4] Or Q31 = 7 [5] Or Q31 = 9 [2] Or Q31 = 9 [3] Or Q31 = 9 [4] Or Q31 = 9 [5] Or Q31 = 2 [2] Or Q31 = 2 [3] Or Q31 = 2 [4] Or Q31 = 2 [5] Or Q31 = 5 [2] Or Q31 = 5 [3] Or Q31 = 5 [4] Or Q31 = 5 [5] Or Q31 = 6 [2] Or Q31 = 6 [3] Or Q31 = 6 [4] Or Q31 = 6 [5]

Q108 In any of these marking relationships, do you use marketing/production contracts?

- Yes
- No

Q108 ¿En alguna de estas relaciones de marcado, ¿utiliza contratos de marketing/mercadeo/producción?

- Si
- No

Q104 Do you grow any certified organic crops in containers or hydroponically?

- Yes (1)
- No (2)

Q104 ¿Cultiva algún cultivo orgánico certificado en contenedores o en cultivos hidropónicos?

- Si (1)
- No (2)

Display This Question: If Q104 = 1

Q105 About what percent of your production is grown in containers and/or hydroponically?

- About 1-25%
- About 26-50%
- About 51-75%
- About 76-100%

Q105 ¿Aproximadamente qué porcentaje de su producción se cultiva en contenedores y/o cultivos hidropónicos?

- Alrededor del 1-25%
- Alrededor del 26-50%
- Alrededor del 51-75%
- Alrededor del 76-100%

Q32 Please list any other sustainable growing certifications you have for your products (other than USDA Organic certification).

Q32 Por favor indique cualquier otra certificación de producción sostenible que tenga para sus productos (aparte de la certificación orgánica del USDA).

End of Block: Part 2: Your Organization & Its Role in California's Organic Agriculture System

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Part 3: Your Use of Organic Price and Volume Data

Q1 This section of the survey focuses on your use of organic price and volume data / information, including Agricultural Marketing Service (AMS) Market News organic data.

Q1 Esta sección de la encuesta se enfoca en el uso que usted hace de los datos sobre precios y volúmenes de productos orgánicos, incluidos los datos emitidos por las Noticias del Servicio de Comercialización Agrícola (AMS por sus siglas en Inglés).

Q2 Do you or others in your farming operation regularly use data on organic prices and/or volumes (including data your own business/organization tracks and/or data from outside organizations)?

- Yes (1)
- No (2)

Q2 ¿Usted u otras personas en su operación agrícola utilizan regularmente datos sobre precios y/o volúmenes de productos orgánicos (incluidos datos que su propia empresa/organización rastrea y/o datos de organizaciones externas)?

- Si (1)
- No (2)

Skip To: Q17 If Q2 = 2

Q3 Of the following, what sources of organic price and volume data do you or others in your farming operation reference most? (choose up to 3)
If you regularly reference one or more data sources not listed here, please use the “Other” options below to tell us what these are.

- ☐ USDA Agricultural Marketing Service (AMS) Market News Organic Price and Volume Data (1)
- ☐ USDA National Agricultural Statistics Service (NASS) Census of Agriculture and/or its data products
- ☐ Organic Farmers Agency for Relationship Marketing (OFARM)
- ☐ Mercaris, Inc.
- ☐ Organic Grain Research and Information Network (OGRAIN)
- ☐ Organic Trade Association (OTA)
- ☐ Maine Organic Farmers and Gardeners Association (MOFGA) Organic Price Reports
- ☐ Data your own business / organization tracks about its operations
- ☐ Information from distributors or wholesalers outside your organization
- ☐ Information from retailers outside your organization
- ☐ Other1 (please specify) _____
- ☐ Other2 (please specify) _____
- ☐ Other3 (please specify) _____

Q3 De las siguientes, ¿a qué fuentes de datos de precios y volúmenes de productos orgánicos hacen referencia usted u otras personas en su operación agrícola? (Elija hasta 3) Si hace referencia regularmente a una o más fuentes de datos que no figuran aquí, utilice las opciones "Otros" a continuación, para decirnos cuáles son

- ☐ Servicio de Comercialización Agrícola (AMS) del USDA. Noticias de mercado datos de precios y volúmenes de productos orgánicos (1)
- ☐ Censo agrícola del Servicio Nacional de Estadísticas Agrícolas (NASS por sus siglas en Inglés) del USDA y/o sus productos de datos
- ☐ Agencia de Agricultores Orgánicos para relaciones de mercado (OFARM por sus siglas en Inglés)
- ☐ Mercaris, Inc.
- ☐ Red de Investigación e Información sobre Granos Orgánicos (OGRAIN)
- ☐ Asociación de Comercio Orgánico (OTA)
- ☐ Informes de precios orgánicos de la Asociación de Jardineros y Agricultores Orgánicos de Maine (MOFGA por sus siglas en Inglés)
- ☐ Datos que su propia empresa/organización rastrea sobre sus operaciones
- ☐ Información de distribuidores o mayoristas fuera de su organización
- ☐ Información de minoristas fuera de su organización
- ☐ Otro1 (por favor especifique) _____
- ☐ Otro2 (por favor especifique) _____
- ☐ Otro3 (por favor especifique) _____

Display This Question: If Q3 Count Is Greater Than or Equal to 2
Carry Forward Selected Choices - Entered Text from "Q3"

Q4 How useful do you find each of these data sources for your farming operation?

	Most useful [11]	*Display This Answer: If Q3 Count Is Greater Than or Equal to 2* Second most useful [12]	*Display This Answer: If Q3 Count Is Greater Than or Equal to 3* Third most useful [13]
USDA Agricultural Marketing Service (AMS) Market News Organic Price and Volume Data	O	O	O
USDA National Agricultural Statistics Service (NASS) Census of Agriculture and/or its data products	O	O	O
Organic Farmers Agency for Relationship Marketing (OFARM)	O	O	O
Mercaris, Inc.	O	O	O
Organic Grain Research and Information Network (OGRAIN)	O	O	O
Organic Trade Association (OTA)	O	O	O
Maine Organic Farmers and Gardeners Association (MOFGA) Organic Price Reports	O	O	O
Data your own business / organization tracks about its operations	O	O	O
Information from distributors or wholesalers outside your organization	O	O	O
Information from retailers outside your organization	O	O	O
Other1 (please specify)	O	O	O
Other2 (please specify)	O	O	O
Other3 (please specify)	O	O	O

Q4 ¿Qué tan útil le parece cada una de estas fuentes de datos para su operación agrícola?

	La más útil [11]	*Display This Answer: If Q3 Count Is Greater Than or Equal to 2* La segunda más útil [12]	*Display This Answer: If Q3 Count Is Greater Than or Equal to 3* La tercera más útil [13]
Servicio de Comercialización Agrícola (AMS) del USDA. Noticias de mercado datos de precios y volúmenes de productos orgánicos	O	O	O
Censo agrícola del Servicio Nacional de Estadísticas Agrícolas (NASS por sus siglas en Inglés) del USDA y/o sus productos de datos	O	O	O
Agencia de Agricultores Orgánicos para relaciones de mercado (OFARM por sus siglas en Inglés)	O	O	O
Mercaris, Inc.	O	O	O
Red de Investigación e Información sobre Granos Orgánicos (OGRAIN)	O	O	O
Asociación de Comercio Orgánico (OTA)	O	O	O
Informes de precios orgánicos de la Asociación de Jardineros y Agricultores Orgánicos de Maine (MOFGA por sus siglas en Inglés)	O	O	O
Datos que su propia empresa/organización rastrea sobre sus operaciones	O	O	O
Información de distribuidores o mayoristas fuera de su organización	O	O	O
Información de minoristas fuera de su organización	O	O	O
Otro1 (por favor especifique)	O	O	O
Otro2 (por favor especifique)	O	O	O
Otro3 (por favor especifique)	O	O	O

Display This Question: If Q3 Count Is Greater Than or Equal to 1

Q5 About how often do you receive or access updates to data from {Q3 Choice}?

- Daily
- Weekly
- Monthly
- Quarterly
- Seasonally
- Yearly
- Less often than yearly

Q5 Con qué frecuencia recibe o accede a actualizaciones de datos de {Q3 Choice}?

- A diario
- Semanalmente
- Mensual
- Trimestral
- Durante la temporada
- Anual
- Con menos frecuencia que anualmente

Display This Question: If Q3 Count Is Greater Than or Equal to 1

Q6 What aspects of your business are impacted by data from {Q3 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving a fair price for organic products
- ☐ Making purchasing and/or harvesting decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Making other business decisions
- ☐ None of these

Q6 ¿Qué aspectos de su negocio se ven afectados por los datos de {Q3 Choice}? (Seleccione todas las opciones que apliquen)

- ☐ En la evaluación de las condiciones del mercado, identificar las tendencias del mercado y/o monitorear los patrones de precios
- ☐ Fijación de precios para los productos orgánicos
- ☐ Determinando si estamos recibiendo un precio justo por los productos orgánicos
- ☐ Tomando decisiones de compra y/o cosecha
- ☐ Ajustando nuestra propia producción orgánica o volúmenes de compra
- ☐ Evaluando necesidades de transporte y/o equipo
- ☐ Evaluando el movimiento de productos orgánicos como el nuestro
- ☐ Planificando el futuro de nuestro negocio
- ☐ Tomando otras decisiones comerciales
- ☐ Ninguna de estas

Display This Question: If Q3 Count Is Greater Than or Equal to 1

Q7 How do you or others in your farming operation currently access data from {Q3 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (27) _____

Q7 ¿De qué forma usted u otras personas en su operación agrícola acceden a los datos de {Q3 Choice}? (seleccione todas las opciones que correspondan)

- ☐ Correo electrónico (1)
- ☐ Página web (18)
- ☐ Aplicación para cellular (19)
- ☐ Redes sociales (Facebook, Instagram, etc.) (20)
- ☐ Llamada telefónica (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ En persona (24)
- ☐ Materiales impresos (25)
- ☐ Actualizaciones de datos automatizadas que nos permiten mantener nuestras propias tablas de datos, visualizaciones y/o informes (por ejemplo a través de API) (26)
- ☐ Otros (por favor especifique) (27) _____

Display This Question: If Q7 = 1 Or Q7 = 18 Or Q7 = 19 Or Q7 = 20 Or Q7 = 21 Or Q7 = 22 Or Q7 = 23 Or Q7 = 24 Or Q7 = 25 Or Q7 = 27

Q125 In what format do you or others in your farming operation usually access data from {Q3 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Q125 ¿De qué forma usted u otras personas en su operación agrícola acceden a los datos de {Q3 Choice}? (Seleccione todas las opciones que apliquen)

- ☐ Formato de audio estandarizado/estático (como grabaciones)
- ☐ Formato visual estandarizado/estático (como informes o figuras)
- ☐ Formato audiovisual mixto estandarizado/estático (como vídeos informativos)
- ☐ Formato de audio interactivo (como conversaciones)
- ☐ Formato visual interactivo (como paneles en vivo)
- ☐ Formato audiovisual mixto interactivo (como presentaciones)

Display This Question: If Q125 Count Is Greater Than 0
Carry Forward Selected Choices from "Q125"

Q129 For each of the data formats you just selected, which level of detail is the data you or others in your farming operation usually access from {Q3 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Q129 Para cada uno de los formatos de datos que acaba de seleccionar, ¿de qué nivel de detalle son los datos que usted u otras personas en su operación agrícola suelen acceder? {Q3 Choice}? (Seleccione todas las opciones que apliquen)

	Datos individuales puntuales (como el precio de un producto básico en un momento/lugar específico)	Datos individuales puntuales con alguna explicación	Datos resumidos (como el precio promedio de un producto básico a lo largo de un periodo de tiempo)	Datos resumidos con alguna explicación
Formato de audio estandarizado/estático (como grabaciones)	☐	☐	☐	☐
Formato visual estandarizado/estático (como informes o figuras)	☐	☐	☐	☐
Formato audiovisual mixto estandarizado/estático (como vídeos informativos)	☐	☐	☐	☐
Formato de audio interactivo (como conversaciones)	☐	☐	☐	☐
Formato visual interactivo (como paneles en vivo)	☐	☐	☐	☐
Formato audiovisual mixto interactivo (como presentaciones)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q8 About how often do you receive or access updates to data from {Q4 = 11 Choice}?

- Daily
- Weekly
- Monthly
- Quarterly
- Seasonally
- Yearly
- Less often than yearly

Q8 Con qué frecuencia recibe o accede a actualizaciones de datos de {Q4 = 11 Choice}?

- A diario
- Semanalmente
- Mensual
- Trimestral
- Durante la temporada
- Anual
- Con menos frecuencia que anualmente

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q9 What aspects of your business are impacted by data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving a fair price for organic products
- ☐ Making purchasing and/or harvesting decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Making other business decisions
- ☐ None of these

Q9 ¿Qué aspectos de su negocio se ven afectados por los datos de {Q4 = 11 Choice}? (Seleccione todas las opciones que apliquen)

- ☐ En la evaluación de las condiciones del mercado, identificar las tendencias del mercado y/o monitorear los patrones de precios
- ☐ Fijación de precios para los productos orgánicos
- ☐ Determinando si estamos recibiendo un precio justo por los productos orgánicos
- ☐ Tomando decisiones de compra y/o cosecha
- ☐ Ajustando nuestra propia producción orgánica o volúmenes de compra
- ☐ Evaluando necesidades de transporte y/o equipo
- ☐ Evaluando el movimiento de productos orgánicos como el nuestro
- ☐ Planificando el futuro de nuestro negocio
- ☐ Tomando otras decisiones comerciales
- ☐ Ninguna de estas

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q10 How do you or others in your farming operation currently access data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (27) _____

Q10 ¿De qué forma usted u otras personas en su operación agrícola acceden a los datos de {Q4 = 11 Choice}? (Seleccione todas las opciones que apliquen)

- ☐ Correo electrónico (1)
- ☐ Página web (18)
- ☐ Aplicación para cellular (19)
- ☐ Redes sociales (Facebook, Instagram, etc.) (20)
- ☐ Llamada telefónica (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ En persona (24)
- ☐ Materiales impresos (25)
- ☐ Actualizaciones de datos automatizadas que nos permiten mantener nuestras propias tablas de datos, visualizaciones y/o informes (por ejemplo a través de API) (26)
- ☐ Otros (por favor especifique) (27) _____

Display This Question: If Q10 = 1 Or Q10 = 18 Or Q10 = 19 Or Q10 = 20 Or Q10 = 21 Or Q10 = 22 Or Q10 = 23 Or Q10 = 24 Or Q10 = 25 Or Q10 = 27

Q126 In what format do you or others in your farming operation usually access data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Q126 ¿De qué forma usted u otras personas en su operación agrícola acceden a los datos de {Q4 = 11 Choice}? (Seleccione todas las opciones que apliquen)

- ☐ Formato de audio estandarizado/estático (como grabaciones)
- ☐ Formato visual estandarizado/estático (como informes o cifras)
- ☐ Formato audiovisual mixto estandarizado/estático (como vídeos informativos)
- ☐ Formato de audio interactivo (como conversaciones)
- ☐ Formato visual interactivo (como paneles en vivo)
- ☐ Formato audiovisual mixto interactivo (como presentaciones)

Display This Question: If Q126 Count Is Greater Than 0
Carry Forward Selected Choices from "Q126"

Q130 For each of the data formats you just selected, which level of detail is the data you or others in your farming operation usually access from {Q4 = 11 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Q130 Para cada uno de los formatos de datos que acaba de seleccionar, ¿de qué nivel de detalle son los datos que usted u otras personas en su operación agrícola suelen acceder {Q4 = 11 Choice}? (Seleccione todas las opciones que apliquen)

	Datos individuales puntuales (como el precio de un producto básico en un momento/lugar específico)	Datos individuales puntuales con alguna explicación	Datos resumidos (como el precio promedio de un producto básico a lo largo de un periodo de tiempo)	Datos resumidos con alguna explicación
Formato de audio estandarizado/estático (como grabaciones)	☐	☐	☐	☐
Formato visual estandarizado/estático (como informes o cifras)	☐	☐	☐	☐
Formato audiovisual mixto estandarizado/estático (como vídeos informativos)	☐	☐	☐	☐
Formato de audio interactivo (como conversaciones)	☐	☐	☐	☐
Formato visual interactivo (como paneles en vivo)	☐	☐	☐	☐
Formato audiovisual mixto interactivo (como presentaciones)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 12

Q11 About how often do you receive or access updates to data from {Q4 = 12 Choice}?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly

Q11 Con qué frecuencia recibe o accede a actualizaciones de datos de {Q4 = 12 Choice}?

- ○ A diario
- ○ Semanalmente
- ○ Mensual
- ○ Trimestral
- ○ Durante la temporada
- ○ Anual
- ○ Con menos frecuencia que anualmente

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 12

Q12 What aspects of your business are impacted by data from {Q4 = 12 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving a fair price for organic products
- ☐ Making purchasing and/or harvesting decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Making other business decisions
- ☐ None of these

Q12 ¿Qué aspectos de su negocio se ven afectados por los datos de {Q4 = 12 Choice}? (Seleccione todas las opciones que apliquen)

- ☐ En la evaluación de las condiciones del mercado, identificar las tendencias del mercado y/o monitorear los patrones de precios
- ☐ Fijación de precios para los productos orgánicos
- ☐ Determinando si estamos recibiendo un precio justo por los productos orgánicos
- ☐ Tomando decisiones de compra y/o cosecha
- ☐ Ajustando nuestra propia producción orgánica o volúmenes de compra
- ☐ Evaluando necesidades de transporte y/o equipo
- ☐ Evaluando el movimiento de productos orgánicos como el nuestro
- ☐ Planificando el futuro de nuestro negocio
- ☐ Tomando otras decisiones comerciales
- ☐ Ninguna de estas

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 12

Q13 How do you or others in your farming operation currently access data from {Q4 = 12 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (27) _____

Q13 ¿De qué forma usted u otras personas en su operación agrícola acceden a los datos de {Q4 = 12 Choice}? (Seleccione todas las opciones que apliquen)

- ☐ Correo electrónico (1)
- ☐ Página web (18)
- ☐ Aplicación para cellular (19)
- ☐ Redes sociales (Facebook, Instagram, etc.) (20)
- ☐ Llamada telefónica (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ En persona (24)
- ☐ Materiales impresos (25)
- ☐ Actualizaciones de datos automatizadas que nos permiten mantener nuestras propias tablas de datos, visualizaciones y/o informes (por ejemplo a través de API) (26)
- ☐ Otros (por favor especifique) (27) _____

Display This Question: If Q13 = 1 Or Q13 = 18 Or Q13 = 19 Or Q13 = 20 Or Q13 = 21 Or Q13 = 22 Or Q13 = 23 Or Q13 = 24 Or Q13 = 25 Or Q13 = 27

Q127 In what format do you or others in your farming operation usually access data from {Q4 = 12 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Q127 ¿De qué forma usted u otras personas en su operación agrícola acceden a los datos de {Q4 = 12 Choice}? (Seleccione todas las opciones que apliquen)

- ☐ Formato de audio estandarizado/estático (como grabaciones)
- ☐ Formato visual estandarizado/estático (como informes o figuras)
- ☐ Formato audiovisual mixto estandarizado/estático (como vídeos informativos)
- ☐ Formato de audio interactivo (como conversaciones)
- ☐ Formato visual interactivo (como paneles en vivo)
- ☐ Formato audiovisual mixto interactivo (como presentaciones)

Display This Question: If Q127 Count Is Greater Than 0
Carry Forward Selected Choices from "Q127"

Q131 For each of the data formats you just selected, which level of detail is the data you or others in your farming operation usually access from {Q4 = 12 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Q131 Para cada uno de los formatos de datos que acaba de seleccionar, ¿de qué nivel de detalle son los datos que usted u otras personas en su operación agrícola suelen acceder {Q4 = 12 Choice}? (Seleccione todas las opciones que apliquen)

	Datos individuales puntuales (como el precio de un producto básico en un momento/lugar específico)	Datos individuales puntuales con alguna explicación	Datos resumidos (como el precio promedio de un producto básico a lo largo de un periodo de tiempo)	Datos resumidos con alguna explicación
Formato de audio estandarizado/estático (como grabaciones)	☐	☐	☐	☐
Formato visual estandarizado/estático (como informes o figuras)	☐	☐	☐	☐
Formato audiovisual mixto estandarizado/estático (como vídeos informativos)	☐	☐	☐	☐
Formato de audio interactivo (como conversaciones)	☐	☐	☐	☐
Formato visual interactivo (como paneles en vivo)	☐	☐	☐	☐
Formato audiovisual mixto interactivo (como presentaciones)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 3 And Q4 = 13

Q14 About how often do you receive updates to data from {Q4 = 13 Choice}?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly

Q14 Con qué frecuencia recibe o accede a actualizaciones de datos de {Q4 = 13 Choice}?

- ○ A diario
- ○ Semanalmente
- ○ Mensual
- ○ Trimestral
- ○ Durante la temporada
- ○ Anual
- ○ Con menos frecuencia que anualmente

Display This Question: If Q3 Count Is Greater Than or Equal to 3 And Q4 = 13

Q15 What aspects of your business are impacted by data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving a fair price for organic products
- ☐ Making purchasing and/or harvesting decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Making other business decisions
- ☐ None of these

Q15 ¿Qué aspectos de su negocio se ven afectados por los datos de {Q4 = 13 Choice}? (Seleccione todas las opciones que apliquen)

- ☐ En la evaluación de las condiciones del mercado, identificar las tendencias del mercado y/o monitorear los patrones de precios
- ☐ Fijación de precios para los productos orgánicos
- ☐ Determinando si estamos recibiendo un precio justo por los productos orgánicos
- ☐ Tomando decisiones de compra y/o cosecha
- ☐ Ajustando nuestra propia producción orgánica o volúmenes de compra
- ☐ Evaluando necesidades de transporte y/o equipo
- ☐ Evaluando el movimiento de productos orgánicos como el nuestro
- ☐ Planificando el futuro de nuestro negocio
- ☐ Tomando otras decisiones comerciales
- ☐ Ninguna de estas

Display This Question: If Q3 Count Is Greater Than or Equal to 3 And Q4 = 13

Q16 How do you or others in your farming operation currently access data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (27) _____

Q16 ¿De qué forma usted u otras personas en su operación agrícola acceden a los datos de {Q4 = 13 Choice}? (Seleccione todas las opciones que apliquen)

- ☐ Correo electrónico (1)
- ☐ Página web (18)
- ☐ Aplicación para cellular (19)
- ☐ Redes sociales (Facebook, Instagram, etc.) (20)
- ☐ Llamada telefónica (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ En persona (24)
- ☐ Materiales impresos (25)
- ☐ Actualizaciones de datos automatizadas que nos permiten mantener nuestras propias tablas de datos, visualizaciones y/o informes (por ejemplo a través de API) (26)
- ☐ Otros (por favor especifique) (27) _____

Display This Question: If Q16 = 1 Or Q16 = 18 Or Q16 = 19 Or Q16 = 20 Or Q16 = 21 Or Q16 = 22 Or Q16 = 23 Or Q16 = 24 Or Q16 = 25 Or Q16 = 27

Q128 In what format do you or others in your farming operation usually access data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Q128 ¿De qué forma usted u otras personas en su operación agrícola acceden a los datos de {Q4 = 13 Choice}? (Seleccione todas las opciones que apliquen)

- ☐ Formato de audio estandarizado/estático (como grabaciones)
- ☐ Formato visual estandarizado/estático (como informes o figuras)
- ☐ Formato audiovisual mixto estandarizado/estático (como vídeos informativos)
- ☐ Formato de audio interactivo (como conversaciones)
- ☐ Formato visual interactivo (como paneles en vivo)
- ☐ Formato audiovisual mixto interactivo (como presentaciones)

Display This Question: If Q128 Count Is Greater Than 0
Carry Forward Selected Choices from "Q128"

Q132 For each of the data formats you just selected, which level of detail is the data you or others in your farming operation usually access from {Q4 = 13 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Q132 Para cada uno de los formatos de datos que acaba de seleccionar, ¿de qué nivel de detalle son los datos que usted u otras personas en su operación agrícola suelen acceder {Q4 = 13 Choice}? (Seleccione todas las opciones que apliquen)

	Datos individuales puntuales (como el precio de un producto básico en un momento/lugar específico)	Datos individuales puntuales con alguna explicación	Datos resumidos (como el precio promedio de un producto básico a lo largo de un periodo de tiempo)	Datos resumidos con alguna explicación
Formato de audio estandarizado/estático (como grabaciones)	☐	☐	☐	☐
Formato visual estandarizado/estático (como informes o figuras)	☐	☐	☐	☐
Formato audiovisual mixto estandarizado/estático (como vídeos informativos)	☐	☐	☐	☐
Formato de audio interactivo (como conversaciones)	☐	☐	☐	☐
Formato visual interactivo (como paneles en vivo)	☐	☐	☐	☐
Formato audiovisual mixto interactivo (como presentaciones)	☐	☐	☐	☐

Display This Question: If Q3 != 1

Q17 In general, how familiar are you with USDA Agriculture Marketing Service (AMS) Market News agricultural data?

- o Not familiar at all (1)
- o Slightly familiar (2)
- o Moderately familiar (3)
- o Very familiar (4)
- o Extremely familiar (5)

Q17 En general, ¿qué tan familiarizado está con los datos agrícolas de magazine de mercado del Servicio de Comercialización Agrícola (AMS por sus siglas en Inglés) del USDA?

- o No estoy familiarizado(a) en absolute (1)
- o Ligeramente familiar (2)
- o Moderadamente familiar (3)
- o Muy familiar (4)
- o Extremadamente familiar (5)

Display This Question: If Q3 != 1 And Q17 != 1

Q18 How familiar are you with the organic agriculture price and volume data available through AMS Market News?

- Not familiar at all (1)
- Slightly familiar (2)
- Moderately familiar (3)
- Very familiar (4)
- Extremely familiar (5)

Q18 ¿Qué tan familiarizado(a) está con los datos de precios y volúmenes de agricultura orgánica disponibles a través del magazine de mercado del Servicio de Comercialización Agrícola (AMS por sus siglas en Inglés)?

- No estoy familiarizado(a) en absolute (1)
- Ligeramente familiar (2)
- Moderadamente familiar (3)
- Muy familiar (4)
- Extremadamente familiar (5)

Display This Question: If Q3 != 1
And If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5
And If Q18 = 2 Or Q18 = 3 Or Q18 = 4 Or Q18 = 5

Q19 Of the following, which business functions are informed most by Market News organic price and volume data within your farming operation? (choose up to 3)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving a fair price for organic products
- ☐ Making purchasing and/or harvesting decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Making other business decisions
- ☐ None of these

Q19 De las siguientes opciones ¿Cuales funciones comerciales están más informadas por los datos de volumen y precio de productos orgánicos del dentro de su operación agrícola? (elija hasta 3)

- ☐ En la evaluación de las condiciones del mercado, identificar las tendencias del mercado y/o monitorear los patrones de precios
- ☐ Fijación de precios para los productos orgánicos
- ☐ Determinando si estamos recibiendo un precio justo por los productos orgánicos
- ☐ Tomando decisiones de compra y/o cosecha
- ☐ Ajustando nuestra propia producción orgánica o volúmenes de compra
- ☐ Evaluando necesidades de transporte y/o equipo
- ☐ Evaluando el movimiento de productos orgánicos como el nuestro
- ☐ Planificando el futuro de nuestro negocio
- ☐ Tomando otras decisiones comerciales
- ☐ Ninguna de estas

Display This Question: If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5 And If Q18 = 2 Or Q18 = 3 Or Q18 = 4 Or Q18 = 5

Q112 How satisfied are you with each of the following aspects of AMS Market News organic price and volume data?

	Unsatisfied	Somewhat Unsatisfied	Neutral / mixed feelings	Somewhat Satisfied	Satisfied	Not Applicable
These data are available and/or updated as often as we need	O	O	O	O	O	O
These data cover the right products	O	O	O	O	O	O
These data cover the right geographic area(s)	O	O	O	O	O	O
These data are easy to access	O	O	O	O	O	O
These data are accurate	O	O	O	O	O	O
These data are easy to understand and interpret	O	O	O	O	O	O
We are able to use these data the way we want to	O	O	O	O	O	O
These data work well with automated reports we use or want to use	O	O	O	O	O	O

Q112 ¿Cuál es su nivel de satisfacción con cada uno de los siguientes aspectos de los datos de precios y volúmenes de productos orgánicos del magazine de mercado del Servicio de Comercialización Agrícola (AMS)?

	Insatisfecho(a)	Algo insatisfecho(a)	Sentimientos neutros/mixtos	De alguna manera satisfecho(a)	Satisfecho(a)	No aplica
Estos datos están disponibles y/o actualizados tan a menudo como necesitamos	O	O	O	O	O	O
Estos datos cubren los productos correctos	O	O	O	O	O	O
Estos datos cubren las áreas geográficas correctas	O	O	O	O	O	O
Estos datos son de fácil acceso	O	O	O	O	O	O
Estos datos son exactos	O	O	O	O	O	O
Estos datos son fáciles de entender e interpretar	O	O	O	O	O	O
Podemos utilizar estos datos de la forma que queramos	O	O	O	O	O	O
Estos datos funcionan bien con los informes automatizados que utilizamos o queremos utilizar	O	O	O	O	O	O

Display This Question: If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5 Or If Q3 = 1

Q21 Do you or others in your farming operation regularly refer to Market News non-organic data to make business decisions?

- Yes (1)
- No (2)

Q21 ¿Usted u otras personas en su operación agrícola consultan periódicamente los datos de productos no orgánicos del magazine de mercado para tomar decisiones comerciales?

- Si (1)
- No (2)

Display This Question: If Q21 = 1

Q146 What business decisions are informed by AMS Market News non-organic data?

Q146 ¿Qué decisiones comerciales se basan en los datos de productos no orgánicos del magazine de mercado del Servicio de Comercialización Agrícola (AMS)?

End of Block: Part 3: Your use of Organic Price & Volume Data

Part 4: Your Ideal Organic Commodity Data

Q109 This section of the survey focuses on what your ideal organic price and volume data would look like.

Q109 Esta sección de la encuesta se enfoca en cómo serían los datos de volumen y precio de productos orgánico de forma ideal para usted

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Q113 How important to your farming operation are each of the following aspects of organic price and volume data?

	Not at all important	Of minor importance	Moderately important	Important BUT NOT essential for using the data	Important AND essential for using the data	Not applicable
The data are available and/or updated as often as we need	O	O	O	O	O	O
The data cover the right products	O	O	O	O	O	O
The data cover the right geographic area(s)	O	O	O	O	O	O
The data are easy to access	O	O	O	O	O	O
The data are accurate	O	O	O	O	O	O
The data are easy to understand and interpret	O	O	O	O	O	O
We are able to use the data the way we want to	O	O	O	O	O	O
The data work well with automated reports we use or want to use	O	O	O	O	O	O

Q113 ¿Qué importancia tienen para su operación agrícola cada uno de los siguientes aspectos de los datos de precio y volumen de productos orgánicos?

	No tan importante	De menor importancia	Moderadamente importante	Importante PERO NO esencial para usar los datos	Importante Y esencial para utilizar los datos	No aplica
Los datos están disponibles y/o actualizados con la frecuencia que necesitamos	O	O	O	O	O	O
Los datos cubren los productos correctos	O	O	O	O	O	O
Los datos cubren las áreas geográficas correctas	O	O	O	O	O	O
Los datos son de fácil acceso	O	O	O	O	O	O
Los datos son exactos	O	O	O	O	O	O
Los datos son fáciles de entender e interpretar	O	O	O	O	O	O
Podemos utilizar los datos como queramos	O	O	O	O	O	O
Los datos funcionan bien con los informes automatizados que utilizamos o queremos utilizar	O	O	O	O	O	O

Q116 How would you most like to access and/or receive data updates? (choose up to 3)

- ☐ Email (1)
- ☐ Website (4)
- ☐ Smartphone app (5)
- ☐ Social media (Facebook, Instagram, etc.) (6)
- ☐ Phone call (7)
- ☐ Radio (8)
- ☐ Podcast (9)
- ☐ In-person (10)
- ☐ Printed materials (11)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (12)
- ☐ Other (please specify) (3) _____
- ☐ We're not interested in these data (13)

Q116 ¿Cómo le gustaría más acceder y/o recibir actualizaciones de datos? (Elija hasta 3)

- ☐ Correo electrónico (1)
- ☐ Página web (4)
- ☐ Aplicación para cellular (5)
- ☐ Redes sociales (Facebook, Instagram, etc.) (6)
- ☐ Llamada telefónica (7)
- ☐ Radio (8)
- ☐ Podcast (9)
- ☐ En persona (10)
- ☐ Materiales impresos (11)
- ☐ Actualizaciones de datos automatizadas que nos permiten mantener nuestras propias tablas de datos, visualizaciones y/o informes (por ejemplo a través de API) (12)
- ☐ Otros (por favor especifique) (3) _____
- ☐ No nos interesan esos datos (13)

Display This Question: If Q116 = 1 Or Q116 = 4 Or Q116 = 5 Or Q116 = 6 Or Q116 = 7 Or Q116 = 8 Or Q116 = 9 Or Q116 = 10 Or Q116 = 11 Or Q116 = 3

Q117 What data format do you prefer? (choose up to 3)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Q117 ¿Qué formato de datos prefiere? (Elija hasta 3)

- ☐ Formato de audio estandarizado/estático (como grabaciones)
- ☐ Formato visual estandarizado/estático (como informes o figuras)
- ☐ Formato audiovisual mixto estandarizado/estático (como vídeos informativos)
- ☐ Formato de audio interactivo (como conversaciones)
- ☐ Formato visual interactivo (como paneles en vivo)
- ☐ Formato audiovisual mixto interactivo (como presentaciones)

Display This Question: If Q117 Count Is Greater Than 0
Carry Forward Selected Choices from "Q117"

Q123 For each of the data formats you just selected, which level of detail would you prefer the data to have? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Q123 Para cada uno de los formatos de datos que acaba de seleccionar, ¿qué nivel de detalle preferiría que tuvieran? (elija todos las opciones que correspondan)

	Datos individuales puntuales (como el precio de un producto básico en un momento/lugar específico)	Datos individuales puntuales con alguna explicación	Datos resumidos (como el precio promedio de un producto básico a lo largo de un periodo de tiempo)	Datos resumidos con alguna explicación
Formato de audio estandarizado/estático (como grabaciones)	☐	☐	☐	☐
Formato visual estandarizado/estático (como informes o figuras)	☐	☐	☐	☐
Formato audiovisual mixto estandarizado/estático (como vídeos informativos)	☐	☐	☐	☐
Formato de audio interactivo (como conversaciones)	☐	☐	☐	☐
Formato visual interactivo (como paneles en vivo)	☐	☐	☐	☐
Formato audiovisual mixto interactivo (como presentaciones)	☐	☐	☐	☐

Q24 How frequently would your farm benefit from updates to organic price and volume data?

- Daily
- Weekly
- Monthly
- Quarterly
- Seasonally
- Yearly
- Less often than yearly
- We're not interested in these data

Q24 ¿Qué frecuencia en las actualizaciones de los datos de precios y volúmenes de productos orgánicos sería benéfico para su operación?

- A diario
- Semanalmente
- Mensual
- Trimestral
- Durante la temporada
- Anual
- Con menos frecuencia que anualmente
- No nos interesan esos datos

Q26 How useful would additional data on organic products in each of the following categories be to your farm?

	Not at all useful	Slightly useful	Moderately useful	Very useful	Extremely useful
Major specialty crops	O	O	O	O	O
Major grain crops	O	O	O	O	O
Other crops	O	O	O	O	O
Livestock and/or poultry	O	O	O	O	O
Dairy and/or eggs	O	O	O	O	O
Non-food commodities like cotton or other fibers	O	O	O	O	O
Value-added specialty crop products	O	O	O	O	O
Value-added grain products	O	O	O	O	O
Value-added livestock and/or poultry products	O	O	O	O	O
Value-added dairy and/or egg products	O	O	O	O	O
Value-added non-food products like textiles	O	O	O	O	O
Other value-added products	O	O	O	O	O

Q26 ¿Qué utilidad tendrían para su explotación datos adicionales sobre productos orgánicos en cada una de las siguientes categorías?

	Nada útil	Ligeramente útil	Moderadamente útil	Muy útil	Extremadamente útil
Principales cultivos especiales (specialty crops)	O	O	O	O	O
Principales cultivos de cereales/granos	O	O	O	O	O
Otros cultivos	O	O	O	O	O
Ganado y/o aves de corral	O	O	O	O	O
Lácteos y/o huevos	O	O	O	O	O
Productos no alimentarios como el algodón u otras fibras	O	O	O	O	O
Productos de cultivos especiales con valor agregado	O	O	O	O	O
Productos de cereales/granos con valor agregado	O	O	O	O	O
Productos ganaderos y/o avícolas con valor agregado	O	O	O	O	O
Productos lácteos y/o huevos con valor agregado	O	O	O	O	O
Productos no alimentarios con valor agregado, como textiles	O	O	O	O	O
Otros productos de valor agregado	O	O	O	O	O

Q144 What three organic products would you most like to have more price and volume information on?

- First product _____
- Second product _____
- Third product _____

Q144 ¿Nombre tres productos orgánicos de los que le gustaría tener más información sobre precios y volúmenes?

- Primer producto _____
- Segundo producto _____
- Tercer producto _____

Q110 What additional data coverage would be most useful for your farming operation?

Q110 ¿Qué cubrimiento adicional de datos sería más útil para su operación agrícola?

Q111 What additional data products would be most useful for your farming operation?

Q111 ¿Datos sobre qué productos adicionales sería más útil para su operación agrícola?

End of Block: Part 4: Your Ideal Organic Commodity Data

Part 5: Setting Prices and Deciding Price Fairness

Q103 This section of the survey focuses on how your operation sets prices and/or decides on fair pricing.

Q103 Esta sección de la encuesta se enfoca en cómo su operación fija precios y/o decide precios justos.

Q51 For each of your sales channels, how much control do you feel you or your operation have over pricing of your organic products?

	We have control over setting our own product prices	We try to balance our own price preferences with the price preferences of others and/or the market	We have to accept prices determined by others in the market
Display This Choice: If Q31 = 3 [2] Or Q31 = 3 [3] Or Q31 = 3 [4] Or Q31 = 3 [5] Or Q31 = 4 [2] Or Q31 = 4 [3] Or Q31 = 4 [4] Or Q31 = 4 [5] Sales direct to consumers	O	O	O
Display This Choice: If Q31 = 2 [2] Or Q31 = 2 [3] Or Q31 = 2 [4] Or Q31 = 2 [5] Or Q31 = 5 [2] Or Q31 = 5 [3] Or Q31 = 5 [4] Or Q31 = 5 [5] Or Q31 = 6 [2] Or Q31 = 6 [3] Or Q31 = 6 [4] Or Q31 = 6 [5] Sales to institutions or direct to retailers	O	O	O
Display This Choice: If Q31 = 1 [2] Or Q31 = 1 [3] Or Q31 = 1 [4] Or Q31 = 1 [5] Or Q31 = 7 [2] Or Q31 = 7 [3] Or Q31 = 7 [4] Or Q31 = 7 [5] Sales through intermediate channels (wholesalers, processors, etc.)	O	O	O
Display This Choice: If Q31 = 9 [2] Or Q31 = 9 [3] Or Q31 = 9 [4] Or Q31 = 9 [5] Other sales channels	O	O	O

Q51 Para cada uno de sus canales de ventas, ¿cuánto control cree que usted o su operación tienen sobre el precio de sus productos orgánicos?

	Tenemos control sobre la fijación de los precios de nuestros propios productos	Intentamos balancear nuestras propias preferencias en cuanto a precios con las preferencias de precios de otros y/o del mercado	Tenemos que aceptar precios determinados por otros en el mercado
Display This Choice: If Q31 = 3 [2] Or Q31 = 3 [3] Or Q31 = 3 [4] Or Q31 = 3 [5] Or Q31 = 4 [2] Or Q31 = 4 [3] Or Q31 = 4 [4] Or Q31 = 4 [5] Ventas directas a consumidores(as).	O	O	O
Display This Choice: If Q31 = 2 [2] Or Q31 = 2 [3] Or Q31 = 2 [4] Or Q31 = 2 [5] Or Q31 = 5 [2] Or Q31 = 5 [3] Or Q31 = 5 [4] Or Q31 = 5 [5] Or Q31 = 6 [2] Or Q31 = 6 [3] Or Q31 = 6 [4] Or Q31 = 6 [5] Ventas a instituciones o directas a minoristas	O	O	O
Display This Choice: If Q31 = 1 [2] Or Q31 = 1 [3] Or Q31 = 1 [4] Or Q31 = 1 [5] Or Q31 = 7 [2] Or Q31 = 7 [3] Or Q31 = 7 [4] Or Q31 = 7 [5] Ventas a través de canales intermediarios (mayoristas/brokers, procesadores, etc.)	O	O	O
Display This Choice: If Q31 = 9 [2] Or Q31 = 9 [3] Or Q31 = 9 [4] Or Q31 = 9 [5] Otros canales de venta	O	O	O

Q52 Of the following, which have the largest impact on how much control you feel you have in setting your own prices for your organic products? (choose up to 3)

- ☐ Who we sell our products to (consumers vs. wholesale vs. institutions/retailers, etc.)
- ☐ What product we're selling
- ☐ Consumer demand for and/or trust in organic
- ☐ Environmental or natural impacts on our product yields (drought, wildfires, invasive pests, etc.)
- ☐ Products being close to expiration
- ☐ The use and/or availability of data on price and volume of organic products across the marketplace
- ☐ The use and/or availability of data on our own business costs

Q52 De los siguientes, ¿cuáles tienen el mayor impacto en el grado de control que siente que tiene a la hora de fijar sus propios precios para sus productos orgánicos? (Elija hasta 3)

- ☐ A quién vendemos nuestros productos (consumidores vs mayoristas/brokers vs instituciones/minoristas, etc.)
- ☐ Los producto que estamos vendiendo
- ☐ La demanda de quien consume y/o la confianza productos orgánicos
- ☐ Los impactos ambientales o naturales en el rendimiento de nuestros productos (sequía, incendios forestales, plagas, etc.)
- ☐ Que los productos estén próximos a caducar
- ☐ El uso y/o disponibilidad de datos sobre precio y volumen de productos orgánicos en todo el mercado
- ☐ El uso y/o disponibilidad de datos sobre nuestros propios costos comerciales

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Q53 Which of the following information sources do you or your operation rely on most to set prices for your organic products and/or evaluate the fairness of an organic product price? (choose up to 3)

- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Individual observations from local markets (produce terminals, wholesale markets, produce departments, farmers markets, etc.)
- ☐ Individual conversations with distributors/wholesalers, processors, retailers, or consumers
- ☐ The ability to cover our own business expenses
- ☐ Advice from other farmers in our local marketplace
- ☐ What our counterpart in the sale will accept
- ☐ Market data or information shared from the buyer (wholesaler/distributor/retailer)
- ☐ Other information sources (please specify) _____

Q53 ¿En cuál de las siguientes fuentes de información usted o su operación confían más para fijar los precios de sus productos orgánicos y/o evaluar la si el precio de un producto orgánico es justo? (Elija hasta 3)

- ☐ Datos de precios y volúmenes de productos orgánicos del Magazine de Mercado del Servicio de Comercialización Agrícola AMS
- ☐ Datos de precios y volumen de productos no orgánicos del Magazine de Mercado del AMS
- ☐ Datos de precios y volúmenes de productos orgánicos de otras fuentes (NO del Magazine de Mercado del AMS)
- ☐ Datos de precios y volúmenes de productos no orgánicos de otras fuentes (NO del Magazine de Mercado del AMS)
- ☐ Observaciones individuales de los mercados locales (terminales de productos, mercados mayoristas, departamentos de productos, marquetas/farmers markets, etc.)
- ☐ Conversaciones individuales con distribuidores/mayoristas, procesadores, minoristas o consumidores
- ☐ La capacidad de cubrir nuestros propios gastos comerciales
- ☐ Consejos de otros agricultores en nuestro mercado local
- ☐ Lo que aceptará nuestra contraparte en la venta
- ☐ Datos de mercado o información compartida por el comprador(a) (mayorista/distribuidor/minorista)
- ☐ Otras fuentes de información (por favor especifique) _____

Q134 For each of your sales channels, if you feel that a price is unfair, how likely are you to decline the sale?

	Not likely at all	Slightly likely	Moderately likely	Very likely	Extremely likely
Display This Choice: If Q31 = 3 [2] Or Q31 = 3 [3] Or Q31 = 3 [4] Or Q31 = 3 [5] Or Q31 = 4 [2] Or Q31 = 4 [3] Or Q31 = 4 [4] Or Q31 = 4 [5] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q31 = 2 [2] Or Q31 = 2 [3] Or Q31 = 2 [4] Or Q31 = 2 [5] Or Q31 = 5 [2] Or Q31 = 5 [3] Or Q31 = 5 [4] Or Q31 = 5 [5] Or Q31 = 6 [2] Or Q31 = 6 [3] Or Q31 = 6 [4] Or Q31 = 6 [5] Sales to institutions or direct to retailers	O	O	O	O	O
Display This Choice: If Q31 = 1 [2] Or Q31 = 1 [3] Or Q31 = 1 [4] Or Q31 = 1 [5] Or Q31 = 7 [2] Or Q31 = 7 [3] Or Q31 = 7 [4] Or Q31 = 7 [5] Sales through intermediate channels (wholesalers, processors, etc.)	O	O	O	O	O
Display This Choice: If Q31 = 9 [2] Or Q31 = 9 [3] Or Q31 = 9 [4] Or Q31 = 9 [5] Other sales channels	O	O	O	O	O

Q134 Para cada uno de sus canales de ventas, si considera que un precio es injusto, ¿qué probabilidades hay de que rechace la venta?

	No es probable en absoluto	Ligeramente probable	Moderadamente probable	Muy probable	extremadamente probable
Display This Choice: If Q31 = 3 [2] Or Q31 = 3 [3] Or Q31 = 3 [4] Or Q31 = 3 [5] Or Q31 = 4 [2] Or Q31 = 4 [3] Or Q31 = 4 [4] Or Q31 = 4 [5] Ventas directas a consumidores(as)	O	O	O	O	O
Display This Choice: If Q31 = 2 [2] Or Q31 = 2 [3] Or Q31 = 2 [4] Or Q31 = 2 [5] Or Q31 = 5 [2] Or Q31 = 5 [3] Or Q31 = 5 [4] Or Q31 = 5 [5] Or Q31 = 6 [2] Or Q31 = 6 [3] Or Q31 = 6 [4] Or Q31 = 6 [5] Ventas a instituciones o directas a minoristas	O	O	O	O	O
Display This Choice: If Q31 = 1 [2] Or Q31 = 1 [3] Or Q31 = 1 [4] Or Q31 = 1 [5] Or Q31 = 7 [2] Or Q31 = 7 [3] Or Q31 = 7 [4] Or Q31 = 7 [5] Ventas a través de canales intermediarios (mayoristas/brokers, procesadores, etc.)	O	O	O	O	O
Display This Choice: If Q31 = 9 [2] Or Q31 = 9 [3] Or Q31 = 9 [4] Or Q31 = 9 [5] Otros canales de venta	O	O	O	O	O

Q135 For each of your sales channels, if you feel that a price is unfair, how confident are you that you can negotiate a fairer price?

	Not confident at all	Slightly confident	Moderately confident	Very confident	Extremely confident
Display This Choice: If Q31 = 3 [2] Or Q31 = 3 [3] Or Q31 = 3 [4] Or Q31 = 3 [5] Or Q31 = 4 [2] Or Q31 = 4 [3] Or Q31 = 4 [4] Or Q31 = 4 [5] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q31 = 2 [2] Or Q31 = 2 [3] Or Q31 = 2 [4] Or Q31 = 2 [5] Or Q31 = 5 [2] Or Q31 = 5 [3] Or Q31 = 5 [4] Or Q31 = 5 [5] Or Q31 = 6 [2] Or Q31 = 6 [3] Or Q31 = 6 [4] Or Q31 = 6 [5] Sales to institutions or direct to retailers	O	O	O	O	O
Display This Choice: If Q31 = 1 [2] Or Q31 = 1 [3] Or Q31 = 1 [4] Or Q31 = 1 [5] Or Q31 = 7 [2] Or Q31 = 7 [3] Or Q31 = 7 [4] Or Q31 = 7 [5] Sales through intermediate channels (wholesalers, processors, etc.)	O	O	O	O	O
Display This Choice: If Q31 = 9 [2] Or Q31 = 9 [3] Or Q31 = 9 [4] Or Q31 = 9 [5] Other sales channels	O	O	O	O	O

Q135 Para cada uno de sus canales de ventas, si considera que un precio es injusto, ¿qué confianza tiene en poder negociar un precio más justo?

	No estoy nada confiado(a)	Ligeramente confiado(a)	Moderadamente confiado(a)	Muy confiado(a)	Extremadamente confiado(a)
Display This Choice: If Q31 = 3 [2] Or Q31 = 3 [3] Or Q31 = 3 [4] Or Q31 = 3 [5] Or Q31 = 4 [2] Or Q31 = 4 [3] Or Q31 = 4 [4] Or Q31 = 4 [5] Ventas directas a consumidores(as)	O	O	O	O	O
Display This Choice: If Q31 = 2 [2] Or Q31 = 2 [3] Or Q31 = 2 [4] Or Q31 = 2 [5] Or Q31 = 5 [2] Or Q31 = 5 [3] Or Q31 = 5 [4] Or Q31 = 5 [5] Or Q31 = 6 [2] Or Q31 = 6 [3] Or Q31 = 6 [4] Or Q31 = 6 [5] Ventas a instituciones o directas a minoristas	O	O	O	O	O
Display This Choice: If Q31 = 1 [2] Or Q31 = 1 [3] Or Q31 = 1 [4] Or Q31 = 1 [5] Or Q31 = 7 [2] Or Q31 = 7 [3] Or Q31 = 7 [4] Or Q31 = 7 [5] Ventas a través de canales intermediarios (mayoristas/brokers, procesadores, etc.)	O	O	O	O	O
Display This Choice: If Q31 = 9 [2] Or Q31 = 9 [3] Or Q31 = 9 [4] Or Q31 = 9 [5] Otros canales de venta	O	O	O	O	O

Display This Question: If Q31 = 3 [2] Or Q31 = 3 [3] Or Q31 = 3 [4] Or Q31 = 3 [5] Or Q31 = 4 [2] Or Q31 = 4 [3] Or Q31 = 4 [4] Or Q31 = 4 [5]

Q56 When negotiating a fairer price in sales directly to consumers, what resources do you primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other farmers in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don’t feel we can negotiate a fairer price

Q56 Al negociar un precio más justo en las ventas directas a sus consumidores(as), ¿en qué recursos confía principalmente? (Elija hasta 3)

- ☐ Información de la contraparte en la venta
- ☐ Información de otros(as) agricultores(as) de nuestra red
- ☐ Nuestras propias habilidades de negociación
- ☐ Datos de precios y volúmenes de productos orgánicos del Magazine de Mercado del Servicio de Comercialización Agrícola AMS
- ☐ Datos de precios y volumen de productos no orgánicos del Magazine de Mercado del AMS
- ☐ Datos de precios y volúmenes de productos orgánicos de otras fuentes (NO del Magazine de Mercado del AMS)
- ☐ Datos de precios y volúmenes de productos no orgánicos de otras fuentes (NO del Magazine de Mercado del AMS)
- ☐ Información sobre nuestros propios gastos comerciales
- ☐ Datos que hemos recopilado mediante el seguimiento de nuestros propios productos
- ☐ No creo que podamos negociar un precio más justo

Display This Question: If Q31 = 2 [2] Or Q31 = 2 [3] Or Q31 = 2 [4] Or Q31 = 2 [5] Or Q31 = 5 [2] Or Q31 = 5 [3] Or Q31 = 5 [4] Or Q31 = 5 [5] Or Q31 = 6 [2] Or Q31 = 6 [3] Or Q31 = 6 [4] Or Q31 = 6 [5]

Q137 When negotiating a fairer price in sales to institutions or direct to retailers, what resources do you primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other farmers in your network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don’t feel we can negotiate a fairer price

Q137 A la hora de negociar un precio más justo en las ventas a instituciones o ventas directas a minoristas, ¿en qué recursos se apoya principalmente? (Elija hasta 3)

- ☐ Información de la contraparte en la venta
- ☐ Información de otros(as) agricultores(as) de nuestra red
- ☐ Nuestras propias habilidades de negociación
- ☐ Datos de precios y volúmenes de productos orgánicos del Magazine de Mercado del Servicio de Comercialización Agrícola AMS
- ☐ Datos de precios y volumen de productos no orgánicos del Magazine de Mercado del AMS
- ☐ Datos de precios y volúmenes de productos orgánicos de otras fuentes (NO del Magazine de Mercado del AMS)
- ☐ Datos de precios y volúmenes de productos no orgánicos de otras fuentes (NO del Magazine de Mercado del AMS)
- ☐ Información sobre nuestros propios gastos comerciales
- ☐ Datos que hemos recopilado mediante el seguimiento de nuestros propios productos
- ☐ No creo que podamos negociar un precio más justo

Display This Question: If Q31 = 1 [2] Or Q31 = 1 [3] Or Q31 = 1 [4] Or Q31 = 1 [5] Or Q31 = 7 [2] Or Q31 = 7 [3] Or Q31 = 7 [4] Or Q31 = 7 [5]

Q138 When negotiating a fairer price in sales through intermediate channels, what resources do you primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other farmers in your network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don’t feel we can negotiate a fairer price

Q138 A la hora de negociar un precio más justo en las ventas a través de canales de comercialización intermediarios, ¿en qué recursos se apoya principalmente? (Elija hasta 3)

- ☐ Información de la contraparte en la venta
- ☐ Información de otros(as) agricultores(as) de nuestra red
- ☐ Nuestras propias habilidades de negociación
- ☐ Datos de precios y volúmenes de productos orgánicos del Magazine de Mercado del Servicio de Comercialización Agrícola AMS
- ☐ Datos de precios y volumen de productos no orgánicos del Magazine de Mercado del AMS
- ☐ Datos de precios y volúmenes de productos orgánicos de otras fuentes (NO del Magazine de Mercado del AMS)
- ☐ Datos de precios y volúmenes de productos no orgánicos de otras fuentes (NO del Magazine de Mercado del AMS)
- ☐ Información sobre nuestros propios gastos comerciales
- ☐ Datos que hemos recopilado mediante el seguimiento de nuestros propios productos
- ☐ No creo que podamos negociar un precio más justo

Display This Question: If Q31 = 9 [2] Or Q31 = 9 [3] Or Q31 = 9 [4] Or Q31 = 9 [5]

Q139 When negotiating a fairer price in sales through other channels, what resources do you primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other farmers in your network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don’t feel we can negotiate a fairer price

Q139 A la hora de negociar un precio más justo en las ventas a través de otros canales de comercialización, ¿en qué recursos se apoya principalmente? (Elija hasta 3)

- ☐ Información de la contraparte en la venta
- ☐ Información de otros(as) agricultores(as) de nuestra red
- ☐ Nuestras propias habilidades de negociación
- ☐ Datos de precios y volúmenes de productos orgánicos del Magazine de Mercado del Servicio de Comercialización Agrícola AMS
- ☐ Datos de precios y volumen de productos no orgánicos del Magazine de Mercado del AMS
- ☐ Datos de precios y volúmenes de productos orgánicos de otras fuentes (NO del Magazine de Mercado del AMS)
- ☐ Datos de precios y volúmenes de productos no orgánicos de otras fuentes (NO del Magazine de Mercado del AMS)
- ☐ Información sobre nuestros propios gastos comerciales
- ☐ Datos que hemos recopilado mediante el seguimiento de nuestros propios productos
- ☐ No creo que podamos negociar un precio más justo

Q136 For each of your sales channels, how helpful would free access to your ideal organic price and volume data (as you described earlier in this survey) be when negotiating for a fairer price?

	Not helpful at all	Slightly helpful	Moderately helpful	Very helpful	Extremely helpful
Display This Choice: If Q31 = 3 [2] Or Q31 = 3 [3] Or Q31 = 3 [4] Or Q31 = 3 [5] Or Q31 = 4 [2] Or Q31 = 4 [3] Or Q31 = 4 [4] Or Q31 = 4 [5] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q31 = 2 [2] Or Q31 = 2 [3] Or Q31 = 2 [4] Or Q31 = 2 [5] Or Q31 = 5 [2] Or Q31 = 5 [3] Or Q31 = 5 [4] Or Q31 = 5 [5] Or Q31 = 6 [2] Or Q31 = 6 [3] Or Q31 = 6 [4] Or Q31 = 6 [5] Sales to institutions or direct to retailers	O	O	O	O	O
Display This Choice: If Q31 = 1 [2] Or Q31 = 1 [3] Or Q31 = 1 [4] Or Q31 = 1 [5] Or Q31 = 7 [2] Or Q31 = 7 [3] Or Q31 = 7 [4] Or Q31 = 7 [5] Sales through intermediate channels (wholesalers, processors, etc.)	O	O	O	O	O
Display This Choice: If Q31 = 9 [2] Or Q31 = 9 [3] Or Q31 = 9 [4] Or Q31 = 9 [5] Other sales channels	O	O	O	O	O

Q136 Para cada uno de sus canales de comercialización, ¿qué utilidad tendría el acceso gratuito a su precio orgánico ideal y a datos de volumen (como lo describió previamente en esta encuesta) al negociar un precio más justo?

	No es de ninguna ayuda	Ligeramente útil	Moderadamente útil	Muy útil	Extramadamente útil
Display This Choice: If Q31 = 3 [2] Or Q31 = 3 [3] Or Q31 = 3 [4] Or Q31 = 3 [5] Or Q31 = 4 [2] Or Q31 = 4 [3] Or Q31 = 4 [4] Or Q31 = 4 [5] Ventas directas a consumidores(as)	O	O	O	O	O
Display This Choice: If Q31 = 2 [2] Or Q31 = 2 [3] Or Q31 = 2 [4] Or Q31 = 2 [5] Or Q31 = 5 [2] Or Q31 = 5 [3] Or Q31 = 5 [4] Or Q31 = 5 [5] Or Q31 = 6 [2] Or Q31 = 6 [3] Or Q31 = 6 [4] Or Q31 = 6 [5] Ventas a instituciones o directas a minoristas	O	O	O	O	O
Display This Choice: If Q31 = 1 [2] Or Q31 = 1 [3] Or Q31 = 1 [4] Or Q31 = 1 [5] Or Q31 = 7 [2] Or Q31 = 7 [3] Or Q31 = 7 [4] Or Q31 = 7 [5] Ventas a través de canales intermediarios (mayoristas/brokers, procesadores, etc.)	O	O	O	O	O
Display This Choice: If Q31 = 9 [2] Or Q31 = 9 [3] Or Q31 = 9 [4] Or Q31 = 9 [5] Otros canales de venta	O	O	O	O	O

Q141 Is there anything else we should know about what information informs your pricing and/or marketing decisions?

Q141 ¿Hay algo más que quiera compartirnos sobre qué información influye en sus decisiones de precios y/o marketing?

End of Block: Part 5: Setting Prices & Deciding Price Fairness

Part 6: Personal Characteristics and Views

Q140 In this section, we'd like to learn a bit more about you. As a reminder, your responses are strictly confidential and will be anonymized during analysis.

Q140 En esta sección, nos gustaría conocer un poco más sobre usted. Le recordamos que sus respuestas son estrictamente confidenciales y serán anónimas durante el análisis.

Q65 About how many years have you been involved in organic farm management?

Q65 ¿Aproximadamente cuántos años lleva involucrado(a) en la administración de granjas orgánicas?

Q66 What is your farming background? (check all that apply)

- ☐ I'm a first generation farmer/rancher
- ☐ I'm part of a multi-generation farming family
- ☐ I'm a beginning farmer/rancher (less than 10 years)
- ☐ I've been a farmer/rancher for more than 10 years
- ☐ Prefer not to answer

Q66 ¿Cuál es su experiencia en agricultura? (marque todas las opciones que correspondan)

- ☐ Soy primera generación agricultor(a)/ganadero(a)
- ☐ Soy parte de una familia de agricultores de varias generaciones
- ☐ Soy agricultor(a)/ganadero(a) principiante (menos de 10 años)
- ☐ Soy agricultor(a)/ganadero(a) desde hace más de 10 años
- ☐ Prefiero no responder

Q67 What is your age group?

- o 18-24
- o 25-34
- o 35-44
- o 45-54
- o 55-64
- o 65-74
- o 75 or older
- o Prefer not to answer

Q67 ¿A qué grupo de edad pertenece?

- o 18-24
- o 25-34
- o 35-44
- o 45-54
- o 55-64
- o 65-74
- o Mayor de 75
- o Prefiero no responder

Q68 What best describes the highest level of education you have completed?

- o No formal schooling completed
- o Some elementary
- o Some high-school but no diploma
- o Regular high school diploma or GED or alternative credential
- o Some college credit, but no degree
- o Associates degree (for example: AA, AS)
- o Bachelor's degree (for example: BA, BS)
- o Master's degree (for example: MA, MS, MEng, MEd, MSW, MBA)
- o Professional degree beyond bachelor's degree (for example: MD, DDS, DVM, LLB, JD)
- o Doctorate degree (for example, PhD, EdD)
- o Prefer not to answer

Q68 ¿Qué describe mejor el nivel más alto de educación formal que ha completado?

- o No he completado ningún nivel de educación formal
- o algo de primaria
- o Algo de escuela secundaria pero sin diploma
- o Diploma de escuela secundaria regular o GED o credencial alternativa
- o Algunos créditos universitarios, pero ningún título
- o Título asociado (por ejemplo: AA, AS)
- o Licenciatura (por ejemplo: BA, BS)
- o Maestría (por ejemplo: MA, MS, MEng, MEd, MSW, MBA)
- o Título profesional más allá de la licenciatura (por ejemplo: MD, DDS, DVM, LLB, JD)
- o Título de doctorado (por ejemplo, PhD, EdD)
- o Prefiero no responder

Q69 Are you (choose all that apply):

- ☐ Female
- ☐ Male
- ☐ Transgender, non-binary, or another gender
- ☐ Prefer not to answer

Q69 ¿Es usted? (elija todas las opciones que correspondan):

- ☐ Género femenino
- ☐ Género masculino
- ☐ Transgénero, no binario u otro género
- ☐ Prefiero no responder

Q71 What is your race or ethnicity? (choose all that apply)

- ☐ American Indian or Alaska Native
- ☐ Asian
- ☐ Black or African American
- ☐ Hispanic or Latino
- ☐ Middle Eastern or North African
- ☐ Native Hawaiian or Pacific Islander
- ☐ White
- ☐ Prefer not to answer

Q71 ¿Cuál es su identidad racial o étnica? (elija todas las opciones que correspondan)

- ☐ Indígena Americano(a) o Nativo(a) de Alaska
- ☐ Asiático(a)
- ☐ Negro(a) o Afroamericano(a)
- ☐ Hispano(a) o Latino(a)
- ☐ Medio Oriente o Norte de África
- ☐ Nativo(a) de Hawái o de las islas del Pacífico
- ☐ Blanco(a)
- ☐ Prefiero no responder

Q72 What is your national origin?

- o U.S.
- o Non-U.S.
- o Prefer not to answer

Q72 ¿Cuál es su nacionalidad de origen?

- o Estadounidense
- o No Estadounidense
- o Prefiero no responder

Q142 Are there any other details about yourself you'd like to share with us?

Q142 ¿Hay algún otro detalle sobre usted que le gustaría compartirnos?

End of Block: Part 6: Personal Characteristics & Views

Part 7: Business Characteristics

Q58 In this section, we'd like to learn a bit more about your farm / business / organization. This is the final section of the survey.

Q58 En esta sección, nos gustaría conocer un poco más sobre su granja/negocio/organización. Esta es la sección final de la encuesta.

Q59 Why organic? What would you consider your business's top motivators for farming organically? (choose up to 3)

- ☐ It is good for the health of farmers, consumers, and/or the soil
- ☐ It helps lower pollution and/or address climate change
- ☐ It is more profitable
- ☐ It is what buyers and/or consumers are demanding
- ☐ It is easier to meet regulatory compliance if I just farm organically
- ☐ It is how I have always farmed
- ☐ Non-organic farm inputs are too expensive
- ☐ It preserves rural life, farming for future generations, and/or family farms
- ☐ It invests in flat/cooperative organizations and/or resists the excesses of industrial agriculture
- ☐ Other (please specify) _____

Q59 ¿Por qué produce de forma orgánica? ¿Cuáles consideraría usted las principales motivaciones de su empresa para hacer agricultura orgánica? (Elija hasta 3)

- ☐ Es bueno para la salud de quienes producen, quienes consumen y/o el suelo.
- ☐ Ayuda a reducir la contaminación y/o abordar el cambio climático.
- ☐ es más rentable
- ☐ Es lo que demandan quienes compran y/o quienes consumen
- ☐ Es más fácil cumplir con las regulaciones si solo cultivo orgánicamente
- ☐ Así es como siempre he hecho agricultura
- ☐ Los insumos agrícolas no orgánicos son demasiado caros
- ☐ Esta forma de producir preserva la vida rural, la actividad agrícola para futuras generaciones y/o operaciones familiares.
- ☐ Esta forma de producir invierte en organizaciones horizontales/cooperativas y/o resiste los excesos de la agricultura industrial.
- ☐ Otros (por favor especifique) _____

Q60 If you know, about what year was your farming operation established? Feel free to give an approximate date

Q60 Si sabe, ¿en qué año se estableció su operación agrícola? Puede ser una fecha aproximada.

Q120 If you know, about what year did your farm start consistently using organic farming practices? Feel free to give an approximate date

Q120 Si sabe, ¿en qué año comenzó a utilizar sistemáticamente prácticas de agricultura orgánica en su operación? Puede ser una fecha aproximada.

Q119 If you know, about what year did your farm receive its first organic certification? Feel free to give an approximate date

Q119 Si sabes, ¿En qué año recibió su finca su primera certificación orgánica? Puede ser una fecha aproximada.

Q61 In which county(s) is your farm operation located? (choose all that apply)

- ☐ Alameda
- ☐ Alpine
- ☐ Amador
- ☐ Butte
- ☐ Calaveras
- ☐ Colusa
- ☐ Contra Costa
- ☐ Del Norte
- ☐ El Dorado
- ☐ Fresno
- ☐ Glenn
- ☐ Humboldt
- ☐ Imperial
- ☐ Inyo
- ☐ Kern
- ☐ Kings
- ☐ Lake
- ☐ Lassen
- ☐ Los Angeles
- ☐ Madera
- ☐ Marin
- ☐ Mariposa
- ☐ Mendocino
- ☐ Merced
- ☐ Modoc
- ☐ Mono
- ☐ Monterey
- ☐ Napa
- ☐ Nevada

- ☐ Orange
- ☐ Placer
- ☐ Plumas
- ☐ Riverside
- ☐ Sacramento
- ☐ San Benito
- ☐ San Bernardino
- ☐ San Diego
- ☐ San Francisco
- ☐ San Joaquin
- ☐ San Luis Obispo
- ☐ San Mateo
- ☐ Santa Barbara
- ☐ Santa Clara
- ☐ Santa Cruz
- ☐ Shasta
- ☐ Sierra
- ☐ Siskiyou
- ☐ Solano
- ☐ Sonoma
- ☐ Stanislaus
- ☐ Sutter
- ☐ Tehama
- ☐ Trinity
- ☐ Tulare
- ☐ Tuolumne
- ☐ Ventura
- ☐ Yolo
- ☐ Yuba
- ☐ Other county(ies) outside of California but in the U.S.
- ☐ Areas in Mexico
- ☐ Areas in Canada
- ☐ Other areas outside of the U.S. (NOT Mexico or Canada)

Q61 ¿En qué condado está ubicada su operación agrícola? (elija todas las opciones que correspondan)

- ☐ Alameda
- ☐ Alpine
- ☐ Amador
- ☐ Butte
- ☐ Calaveras
- ☐ Colusa
- ☐ Contra Costa
- ☐ Del Norte
- ☐ El Dorado
- ☐ Fresno

- [ ] Glenn
- [ ] Humboldt
- [ ] Imperial
- [ ] Inyo
- [ ] Kern
- [ ] Kings
- [ ] Lake
- [ ] Lassen
- [ ] Los Angeles
- [ ] Madera
- [ ] Marín
- [ ] Mariposas
- [ ] Mendocino
- [ ] Merced
- [ ] Modoc
- [ ] Mono
- [ ] Monterrey
- [ ] Napa
- [ ] Nevada
- [ ] Orange
- [ ] Placer
- [ ] Plumas
- [ ] Riverside
- [ ] Sacramento
- [ ] San Benito
- [ ] San Bernardino
- [ ] San Diego
- [ ] San Francisco
- [ ] San Joaquín
- [ ] San Luis Obispo
- [ ] San Mateo
- [ ] Santa Bárbara
- [ ] Santa Clara
- [ ] Santa Cruz
- [ ] Shasta
- [ ] Sierra
- [ ] Siskiyou
- [ ] Solano
- [ ] Sonoma
- [ ] Stanislaus
- [ ] Sutter
- [ ] Tehama
- [ ] Trinity
- [ ] Tulare
- [ ] Tuolumne
- [ ] Ventura

- [ ] Yolo
- [ ] Yuba
- [ ] Otro(s) condado(s) fuera de California pero en los Estados Unidos
- [ ] Zonas en México
- [ ] Áreas en Canadá
- [ ] Otras áreas fuera de EE. UU. (NO México o Canadá)

Q62 What is the ownership structure of your farming operation?

- o Sole proprietorship (without limited liability)
- o Partnership (consists of two or more persons as co-owners, without limited liability)
- o Family corporation (51% or more of ownership)
- o Independent corporation (51% or more is not family owned)
- o Cooperative
- o Non-profit organization
- o Other (please specify) _____
- o Prefer not to answer

Q62 ¿Cuál es la forma de propiedad de su operación agrícola?

- o Propiedad individual/sole propietorship (sin responsabilidad limitada)
- o Sociedad (consta de dos o más personas como copropietarios, sin responsabilidad limitada)
- o Corporación familiar (51% o más de la propiedad)
- o Corporación independiente (51% o más no es de propiedad familiar)
- o Cooperativa
- o Organización sin ánimo de lucro
- o Otros (por favor especifique) _____
- o Prefiero no responder

Q64 What best describes your operation's gross farm sales last year?

- o Less than $2,500
- o $2,500 to $4,999
- o $5,000 to $9,999
- o $10,000 to $24,999
- o $25,000 to $49,999
- o $50,000 to $99,999
- o $100,000 to $499,999
- o $500,000 to $999,999
- o $1,000,000 or more
- o Not sure
- o Prefer not to answer

Q64 ¿Cuál describe mejor las ventas agrícolas brutas de su operación el año pasado?

- Menos de $2,500
- $2,500 a $4,999
- $5,000 a $9,999
- $10,000 a $24,999
- $25,000 a $49,999
- $50,000 a $99,999
- $100,000 a $499,999
- $500,000 a $999,999
- $1,000,000 o más
- No estoy seguro(a)
- Prefiero no responder

Q143 How many farm partners, including yourself, manage your operation? Farm partners are those people who you consider to be essential players in farm management and/or operations.

▼ 1 (1) ... 10 or more (10)

Q143 ¿Cuántos socios(as) agrícolas, usted incluido, administran su operación? Socios(as) agrícolas son aquellas personas que usted considera esenciales en la gestión y/o las operación de la granja.

▼ 1 (1) ... 10 o más (10)

Q63 Do the farm partners, including yourself, belong to any of the following historically underserved groups? (check all that apply for each farm partner)

	Veteran	Beginning Ranchers and Farmers (less than 10 years)	American Indian or Alaska Native	Asian or Pacific Islander	Black or African American	Hispanic or Latino	Woman	None of these	Not sure	Prefer not to answer
Display This Choice: If Q143 >= 1 First farm partner	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 2 Second farm partner	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 3 Third farm partner	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 4 Fourth farm partner	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 5 Fifth farm partner	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 6 Sixth farm partner	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 7 Seventh farm partner	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 8 Eighth farm partner	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 9 Ninth farm partner	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 = 10 Tenth farm partner	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Q63 ¿Sus socios en la operación agrícola, usted incluido, pertenecen a alguno de los siguientes grupos históricamente desatendidos? (marque todas las opciones que correspondan para cada socio(a) agrícola)

	Veterano(a)	Ganaderos(as) y agricultores(as) principiantes (menos de 10 años)	Indígena Americano(a) o Nativo de Alaska	Asiático(a) o Isleño(a) del Pacífico	Negro(a) o Afroamericano(a)	Hispano(a) o Latino(a)	Mujer	Ninguna de esas	No estoy seguro(a)	Prefiero no responder
Display This Choice: If Q143 >= 1 Primer(a) socio(a) agrícola	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 2 Segundo(a) socio(a) agrícola	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 3 Tercer(a) socio(a) agrícola	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 4 Cuarto(a) socio(a) agrícola	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 5 Quinto(a) socio(a) agrícola	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 6 Sexto(a) socio(a) agrícola	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 7 Séptimo(a) socio(a) agrícola	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 8 Octavo(a) socio(a) agrícola	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 >= 9 Noveno(a) socio(a) agrícola	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q143 = 10 Décimo(a) socio(a) agrícola	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Q73 OPTIONAL: do you have any suggestions to improve the survey (e.g. a questions was confusing or we forgot to ask something important)? We appreciate your feedback.

Q73 OPCIONAL: ¿Tiene alguna sugerencia para mejorar la encuesta (por ejemplo, sintió que alguna pregunta era confusa o que nos olvidamos de preguntar algo importante)? Agradecemos sus comentarios.

Q74 Are you interested in any of the following? (choose all that apply)

- ☐ Being contacted for a follow-up interview and/or participation in a focus group evaluating AMS Market News organic price and volume data (1)
- ☐ Receiving a $40 gift certificate (2)
- ☐ Receiving updates on this research (3)
- ☐ None of the above (4)

Q74 ¿Le interesa alguna de las siguientes opciones? (Elija todas las opciones que apliquen)

- ☐ Ser contactado(a) para una entrevista de seguimiento y/o participar en un grupo focal que evalúe los datos de precios y volúmenes de productos orgánicos del magazine de mercado del AMS. (1)
- ☐ Recibir un certificado de regalo de $40 (2)
- ☐ Recibir actualizaciones sobre esta investigación (3)
- ☐ Ninguna de las anteriores (4)

Display This Question: If Q74 = 2 And Q74 != 1 And Q74 != 3

Q77 **Please enter your email and information below to receive the $40 e-gift card.**

Important note: ****It may take up to three weeks to distribute e-gift cards.**** Feel free to email us for an update if you have not received your card within that time frame.

Please **double-check before submitting** to ensure accuracy, so we can get your e-gift card to you.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

****TO RECEIVE A GIFT CARD, BE SURE TO (1) VERIFY THIS IS NOT A ROBOTIC SUBMISSION AND (2) CLICK THE RIGHT ARROW BELOW BEFORE CLOSING THIS PAGE.****

- o Your name _____
- o Your email _____
- o Your phone number (in case we need to reach you to verify your email) _____

Q77 **Ingrese su correo electrónico y su información a continuación para recibir la tarjeta de electrónica de regalo de $40.**

Nota importante: ****La distribución de las tarjetas de regalo puede tardar hasta tres**

semanas.** No dude en enviarnos un correo electrónico para preguntar sobre el estado de su tarjeta si no la recibe dentro de ese plazo.

Por favor **verifique de nuevo antes de enviarlo** para garantizar que esté correcto, de modo que podamos enviarle su tarjeta de regalo electrónica.

Recordatorio de confidencialidad: los correos electrónicos se recopilarán en nuestra base de datos cifrada, no se compartirán con ningún proveedor externo y se desvincularán de sus respuestas antes del análisis.

****PARA RECIBIR UNA TARJETA DE REGALO, ASEGÚRESE DE (1) VERIFICAR QUE NO ES UN ENVÍO ROBÓTICO Y (2) DAR CLICK EN LA FLECHA A LA DERECHA ABAJO ANTES DE CERRAR ESTA PÁGINA.****

- Su nombre _____
- Su correo electrónico _____
- Su número de teléfono (en caso de que necesitemos comunicarnos con usted para verificar su correo electrónico)

  _____

Display This Question: If Q74 = 1 And Q74 != 2
Or If Q74 = 3 And Q74 != 2

Q76 **Please share the following information** so we can contact you for an interview or focus group participation and/or update you on the results of this research.

Double-check before submitting to ensure accuracy.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

- Your name _____
- Your email _____
- Your phone number (in case we need to reach you to verify your email) _____

Q76 **Por favor compártanos la siguiente información** para poder comunicarnos con usted para una entrevista o participación en un grupo focal y/o actualizarle sobre los resultados de esta investigación.

verifique de nuevo antes de enviarlo para garantizar que esté correcto

Recordatorio de confidencialidad: los correos electrónicos se recopilarán en nuestra base de

datos cifrada, no se compartirán con ningún proveedor externo y se desvincularán de sus respuestas antes del análisis.

- Su nombre _____
- Su correo electrónico _____
- Su número de teléfono (en caso de que necesitemos comunicarnos con usted para verificar su correo electrónico)

  _____

Display This Question: If Q74 = 2 And Q74 = 1
Or If Q74 = 2 And Q74 = 3

Q75 **Please enter your email and information below to receive the $40 e-gift card**, so we can contact your for an interview or focus group participation, and/or update you on the results of this research (if those options were selected in the previous question).

Important note: ****It may take up to three weeks to distribute e-gift cards.**** Feel free to email us for an update if you have not received your card within that time frame.

Please **double-check before submitting** to ensure accuracy, so we can get your e-gift card to you.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

****TO RECEIVE A GIFT CARD, BE SURE TO (1) VERIFY THIS IS NOT A ROBOTIC SUBMISSION AND (2) CLICK THE RIGHT ARROW BELOW BEFORE CLOSING THIS PAGE.****

- Your name _____
- Your email _____
- Your phone number (in case we need to reach you to verify your email) _____

Q75 **Ingrese su correo electrónico y su información a continuación para recibir la tarjeta de electrónica de regalo de $40**, para poder comunicarnos con usted para una entrevista o participación en un grupo focal y/o actualizarle sobre los resultados de esta investigación. (si esas opciones fueron seleccionadas en la pregunta anterior)

Nota importante: ****La distribución de las tarjetas electrónicas de regalo puede tardar hasta tres semanas.**** No dude en enviarnos un correo electrónico para preguntar sobre el estado de su tarjeta si no la recibe dentro de ese plazo.

Por favor **verifique de nuevo antes de enviarlo** para garantizar que esté correcto, de modo que podamos enviarle su tarjeta de regalo electrónica.

Recordatorio de confidencialidad: Los correos electrónicos se recopilarán en nuestra base de datos cifrada, no se compartirán con ningún proveedor externo y se desvincularán de sus

respuestas antes del análisis.

****PARA RECIBIR UNA TARJETA DE REGALO, ASEGÚRESE DE (1) VERIFICAR QUE NO ES UN ENVÍO ROBÓTICO Y (2) DAR CLICK EN LA FLECHA A LA DERECHA ABAJO ANTES DE CERRAR ESTA PÁGINA.****

- Su nombre _____
- Su correo electrónico _____
- Su número de teléfono (en caso de que necesitemos comunicarnos con usted para verificar su correo electrónico)
  _____

End of Block: Part 7: Business Characteristics

Organic Data Collection Gap Analysis Survey for Wholesalers and Distributors

Part 1: Study Introduction and Consent to Participate

Q3 **Welcome!**

We invite you to take a survey on how organic wholesalers and/or distributors like you use **price and volume data and decide on fair prices** within the organic agriculture industry. Thank you for your participation in this research.

What's the purpose of this research?

The University of California, Davis, Agricultural Sustainability Institute is conducting research to gather information on how famers and businesses in the organic agricultural supply chain use information on product prices so we can make recommendations to the USDA's Agriculture Marketing Service (AMS) to improve its price collection process, website, and publications.

What are the survey questions about?

Our questions are about your wholesale or distribution operation, its role in the organic industry, what organic price and volume data your operation uses when buying and selling products and how you use it, what organic price and volume data would be most useful for your operation, and how you decide on fair pricing for your organic products.

How long will it take to complete?

The survey will take about 15-20 minutes to complete and is completely voluntary. You are welcome to respond to as many questions as you feel comfortable answering. You do not need to answer any questions you do not wish to. You can leave the survey at any time.

Will there be compensation?

The first 100 respondents will receive a **$40 Amazon e-gift card**. You must complete the survey to receive a gift card.

How will confidentiality be ensured?

The survey will ask for some personal information. **Responses will be anonymized prior to analysis and stored in a secure location**. Only the research team will have access to responses and personal identifiers. Any publications will not identify your answers by name or with any other identifying information. This research has been reviewed and approved by an Institutional Review Board (IRB). The IRB is a group of people who oversee research and help protect the rights and welfare of people who participate in research studies like this one.

Dr. Ryan Galt and Dr. Houston Wilson are Principal Investigators on this research, and the United States Department of Agriculture (USDA) provided the funding for this study. **If you have any questions or concerns, please reach out to our primary research contact, Dr. Katie Butterfield at (530) 752-5299 or** klcbutterfield@ucdavis.edu. If you have any questions or concerns about your rights as a participant of this survey, you may contact the UC Davis Office of Research at (916) 703-9158 or hs-irbeducation@ucdavis.edu.

Q4 Clicking the consent button below indicates that you are 18 or older, are a wholesaler or distributor or manage a wholesale or distribution operation that uses or could use USDA AMS organic price and volume data, are not an employee of the US Department of Agriculture, and consent to participate in the survey.

- Yes, I consent to participate in this survey (1)
- No, I do not wish to participate in this survey (2)
- I have already participated in this survey (3)
- I do not quality for this survey (4)

Skip To: End of Survey If Q4 != 1

End of Block: Part 1: Study Introduction & Consent to Participate

Part 2: Your Organization and Its Role in California's Organic Agriculture System

Q76 This section of the survey focuses on your business / organization and its role in California's organic agriculture system.

Q4 Which of the following best describes your primary involvement in California’s organic agriculture system?

- Farmer or farm manager (1)
- Wholesaler or Distributor (8)
- Processor that purchases raw agricultural commodities (9)
- Retailer (10)
- None of these (11)
- My involvement in the organic agriculture system is outside of California (12)
- I don’t work with organic agriculture (13)

Skip To: End of Survey If Q4 = 11
Skip To: End of Survey If Q4 = 12
Skip To: End of Survey If Q4 = 13

Display This Question: If Q4 = 1

Q5 Please proceed to our survey for organic farmers by following this link: Survey for Farmers

Skip To: End of Survey If Q5 Displayed

Display This Question: If Q4 = 9

Q6 Please proceed to our survey for organic processors by following this link: Survey for Processors

Skip To: End of Survey If Q6 Displayed

Display This Question: If Q4 = 10

Q7 Please proceed to our survey for organic retailers by following this link: Survey for Retailers

Skip To: End of Survey If Q7 Displayed

Q8 What best describes your role in your operation?

- Owner/operator (responsible for day-to-day operations)
- An owning partner (not responsible for day-to-day operations)
- A hired manager
- A hired buyer or salesperson
- Other (please specify) _____

Q74 How many people (including yourself) are involved in day-to-day management of your operation?

Q10 About how many different certified organic products does your operation work with?

Q13 About what percent of the certified organic products your operation works with are each of the following?

	None at all	1-25%	26-50%	51-75%	76-100%
Vegetables	O	O	O	O	O
Fruit (including berries, citrus, other tree fruit, grapes, etc.)	O	O	O	O	O
Nuts	O	O	O	O	O
Grains and/or pulses	O	O	O	O	O
Dairy products and/or eggs	O	O	O	O	O
Meat products	O	O	O	O	O
Cut flowers	O	O	O	O	O
Nursery crops and/or seeds	O	O	O	O	O
Value-added products	O	O	O	O	O
Other (please specify)	O	O	O	O	O

Q77 About what percent of your certified organic products do you purchase directly from each of the following?

	None at all [1]	1-25% [7]	26-50% [8]	51-75% [9]	76-100% [10]
Farmers, using marketing/production contracts (29)	O	O	O	O	O
Farmers, without the use of marketing/production contracts (20)	O	O	O	O	O
Processors (30)	O	O	O	O	O
Other distributors or wholesalers (31)	O	O	O	O	O
Other (please specify) (33)	O	O	O	O	O

Q78 About what percent of the certified organic products your organization purchases are produced in each of the following geographic areas?

	None at all	1-25%	26-50%	51-75%	76-100%
Within California	O	O	O	O	O
Outside California, but within the U.S.	O	O	O	O	O
Outside the U.S.	O	O	O	O	O

Display This Question: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Or If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10]

Q79 About what percent of the farms your operation works with are each of the following?

	None at all	1-25%	26-50%	51-75%	76-100%	Not sure
Very small farms (less than about 10 acres)	O	O	O	O	O	O
Small farms (between about 10 and 25 acres)	O	O	O	O	O	O
Mid-size farms (between about 25 and 100 acres)	O	O	O	O	O	O
Large farms (between about 100 and 250 acres)	O	O	O	O	O	O
Very large farms (more than 250 acres)	O	O	O	O	O	O

Q80 About what percent of the organic products your business/organization works with are sold to each of the following?

	None at all [1]	1-25% [7]	26-50% [8]	51-75% [9]	76-100% [10]
Grocery stores, supermarkets, or similar retailers (33)	O	O	O	O	O
Food service providers, restaurants, and/or institutions (like schools or hospitals) (50)	O	O	O	O	O
Processors and/or manufacturers (51)	O	O	O	O	O
Individual consumers (52)	O	O	O	O	O
Other (please specify) (60)	O	O	O	O	O

Q81 About what percent of the organic products your business/organization works with are sold in each of the following geographic areas?

	None at all	1-25%	26-50%	51-75%	76-100%	Not sure
Within California	O	O	O	O	O	O
Outside California, but within the U.S.	O	O	O	O	O	O
Outside the U.S.	O	O	O	O	O	O

Q30 Is your operation part of an organization that is also one or more of the following? (Check all that apply)

- ☐ Farm
- ☐ Retailer
- ☐ Value-added processor
- ☐ Other actor in the organic agriculture supply chain (please specify) _____
- ☐ None of these

Q75 If your organization seeks to sell products with other sustainable or regenerative food certifications (other than USDA Organic certification), please list those certifications here.

End of Block: Part 2: Your Organization & Its Role in California's Organic Agriculture System

Part 3: Your Use of Organic Price and Volume Data

Q1 This section of the survey focuses on your use of organic price and volume data/information, including Agricultural Marketing Service (AMS) Market News organic data.

Q2 Do you or others in your operation regularly use data on organic prices and/or volumes (including data your own business/organization tracks and/or data from outside organizations)?

- o Yes (1)
- o No (2)

Skip To: Q17 If Q2 = 2

Q3 Of the following, what sources of organic price and volume data do you or others in your operation reference most? (choose up to 3)
If you regularly reference one or more data sources not listed here, please use the "Other" options below to tell us what these are.

- ☐ USDA Agricultural Marketing Service (AMS) Market News Organic Price and Volume Data (1)
- ☐ USDA National Agricultural Statistics Service (NASS) Census of Agriculture and/or its data products
- ☐ Organic Farmers Agency for Relationship Marketing (OFARM)
- ☐ Mercaris, Inc.
- ☐ Organic Grain Research and Information Network (OGRAIN)
- ☐ Organic Trade Association (OTA)
- ☐ Maine Organic Farmers and Gardeners Association (MOFGA) Organic Price Reports
- ☐ Data your own business / organization tracks about its operations
- ☐ Information from distributors or wholesalers outside your organization
- ☐ Information from retailers outside your organization
- ☐ Other1 (please specify) _____
- ☐ Other2 (please specify) _____
- ☐ Other3 (please specify) _____

Display This Question: If Q3 Count Is Greater Than or Equal to 2
Carry Forward Selected Choices - Entered Text from "Q3"

Q4 How useful do you find each of these data sources for your operation?

	Most useful [11]	*Display This Answer: If Q3 Count Is Greater Than or Equal to 2* Second most useful [12]	*Display This Answer: If Q3 Count Is Greater Than or Equal to 3* Third most useful [13]
USDA Agricultural Marketing Service (AMS) Market News Organic Price and Volume Data	O	O	O
USDA National Agricultural Statistics Service (NASS) Census of Agriculture and/or its data products	O	O	O
Organic Farmers Agency for Relationship Marketing (OFARM)	O	O	O
Mercaris, Inc.	O	O	O
Organic Grain Research and Information Network (OGRAIN)	O	O	O
Organic Trade Association (OTA)	O	O	O
Maine Organic Farmers and Gardeners Association (MOFGA) Organic Price Reports	O	O	O
Data your own business / organization tracks about its operations	O	O	O
Information from distributors or wholesalers outside your organization	O	O	O
Information from retailers outside your organization	O	O	O
Other1 (please specify)	O	O	O
Other2 (please specify)	O	O	O
Other3 (please specify)	O	O	O

Display This Question: If Q3 Count Is Equal to 1

Q5 About how often do you or others in your operation receive updates to data from {Q3 Choice}?

- Daily
- Weekly
- Monthly
- Quarterly
- Seasonally
- Yearly
- Less often than yearly

Display This Question: If Q3 Count Is Equal to 1

Q6 What aspects of your operation are impacted by data from {Q3 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 Count Is Equal to 1

Q7 How do you or others in your operation currently access data from {Q3 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q7 = 1 Or Q7 = 18 Or Q7 = 19 Or Q7 = 20 Or Q7 = 21 Or Q7 = 22 Or Q7 = 23 Or Q7 = 24 Or Q7 = 25 Or Q7 = 31

Q95 In what format do you or others in your operation usually access data from {Q3 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q95 Count Is Greater Than 0
Carry Forward Selected Choices from "Q95"

Q96 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q3 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q8 About how often do you or others in your operation receive updates to data from {Q4 = 11 Choice}?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q9 What aspects of your business are impacted by data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q10 How do you or others in your operation currently access data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q10 = 1 Or Q10 = 18 Or Q10 = 19 Or Q10 = 20 Or Q10 = 21 Or Q10 = 22 Or Q10 = 23 Or Q10 = 24 Or Q10 = 25 Or Q10 = 31

Q98 In what format do you or others in your operation usually access data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q98 Count Is Greater Than 0
Carry Forward Selected Choices from "Q98"

Q99 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q4 = 11 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 12

Q11 About how often do you or others in your operation receive updates to data from {Q4 = 12 Choice}?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 12

Q12 What aspects of your business are impacted by data from {Q4 = 12 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 12

Q13 How do you or others in your operation currently access data from {Q4 = 12 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q13 = 1 Or Q13 = 18 Or Q13 = 19 Or Q13 = 20 Or Q13 = 21 Or Q13 = 22 Or Q13 = 23 Or Q13 = 24 Or Q13 = 25 Or Q13 = 31

Q102 In what format do you or others in your operation usually access data from {Q4 = 12 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q102 Count Is Greater Than 0
Carry Forward Selected Choices from "Q102"

Q101 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q4 = 12 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 3 And Q4 = 13

Q14 About how often do you or others in your operation receive updates to data from {Q4 = 13 Choice}?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly

Display This Question: If Q3 Count Is Greater Than or Equal to 3 And Q4 = 13

Q15 What aspects of your business are impacted by data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 Count Is Greater Than or Equal to 3 And Q4 = 13

Q16 How do you or others in your operation currently access data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q16 = 1 Or Q16 = 18 Or Q16 = 19 Or Q16 = 20 Or Q16 = 21 Or Q16 = 22 Or Q16 = 23 Or Q16 = 24 Or Q16 = 25 Or Q16 = 31

Q105 In what format do you or others in your operation usually access data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q3 Count Is Greater Than 0
Carry Forward Selected Choices from "Q105"

Q104 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q4 = 13 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 != 1

Q17 In general, how familiar are you with USDA Agriculture Marketing Service (AMS) Market News agricultural data?

- o Not familiar at all (1)
- o Slightly familiar (2)
- o Moderately familiar (3)
- o Very familiar (4)
- o Extremely familiar (5)

Display This Question: If Q3 != 1 And Q17 != 1

Q18 How familiar are you with the organic agriculture price and volume data available through AMS Market News?

- o Not familiar at all (1)
- o Slightly familiar (2)
- o Moderately familiar (3)
- o Very familiar (4)
- o Extremely familiar (5)

Display This Question: If Q3 != 1
And If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5
And If Q18 = 2 Or Q18 = 3 Or Q18 = 4 Or Q18 = 5

Q19 Of the following, which business functions are informed most by Market News organic price and volume data within your operation? (choose up to 3)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 != 1
And If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5
And If Q18 = 2 Or Q18 = 3 Or Q18 = 4 Or Q18 = 5

Q20 How satisfied are you with each of the following aspects of AMS Market News organic price and volume data?

	Unsatisfied	Somewhat unsatisfied	Neutral / mixed feelings	Somewhat satisfied	Satisfied	Not applicable
These data are available and/or updated as often as we need	O	O	O	O	O	O
These data cover the right products	O	O	O	O	O	O
These data cover the right geographic area(s)	O	O	O	O	O	O
These data are easy to access	O	O	O	O	O	O
These data are accurate	O	O	O	O	O	O
These data are easy to understand and interpret	O	O	O	O	O	O
We are able to use these data the way we want to	O	O	O	O	O	O
These data work well with automated reports we use or want to use	O	O	O	O	O	O

Display This Question: If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5 Or If Q3 = 1

Q21 Do you or others in your operation regularly refer to Market News non-organic data to make business decisions?

- Yes (1)
- No (2)

Display This Question: If Q21 = 1

Q107 What business decisions are informed by AMS Market News non-organic data?

End of Block: Part 3: Your use of Organic Price & Volume Data

Part 4: Your Ideal Organic Commodity Data

Q109 This section of the survey focuses on what your ideal organic price and volume data would look like.

Q110 How important to your operation are each of the following aspects of organic price and volume data?

	Not at all important	Of minor importance	Moderately important	Important BUT NOT essential for using the data	Important AND essential for using the data	Not applicable
The data are available and/or updated as often as we need	O	O	O	O	O	O
The data cover the right products	O	O	O	O	O	O
The data cover the right geographic area(s)	O	O	O	O	O	O
The data are easy to access	O	O	O	O	O	O
The data are accurate	O	O	O	O	O	O
The data are easy to understand and interpret	O	O	O	O	O	O
We are able to use the data the way we want to	O	O	O	O	O	O
The data work well with automated reports we use or want to use	O	O	O	O	O	O

Q22 How would you most like to access and/or receive data updates? (choose up to 3)

- ☐ Email (1)
- ☐ Website (2)
- ☐ Smartphone app (3)
- ☐ Social media (Facebook, Instagram, etc.) (4)
- ☐ Phone call (5)
- ☐ Radio (6)
- ☐ Podcast (7)
- ☐ In-person (8)
- ☐ Printed materials (9)
- ☐ Automated data updated that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (10)
- ☐ Other (please specify) (15) _____
- ☐ We're not interested in these data (16)

Display This Question: If Q22 = 1 Or Q22 = 2 Or Q22 = 3 Or Q22 = 4 Or Q22 = 5 Or Q22 = 6 Or Q22 = 7 Or Q22 = 8 Or Q22 = 9 Or Q22 = 15

Q23 What data format do you prefer? (choose up to 3)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q23 Count Is Greater Than 0
Carry Forward Selected Choices from "Q23"

Q111 For each of the data formats you just selected, which level of detail would you prefer the data to have? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Q24 How frequently would your operation benefit from updates to organic price and volume data?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly
- ○ We're not interested in these data

Q25 How useful would additional data on organic products in each of the following categories be to your operation?

	Not at all useful	Slightly useful	Moderately useful	Very useful	Extremely useful
Major specialty crops	O	O	O	O	O
Major grain crops	O	O	O	O	O
Other crops	O	O	O	O	O
Livestock and/or poultry	O	O	O	O	O
Dairy and/or eggs	O	O	O	O	O
Non-food commodities like cotton or other fibers	O	O	O	O	O
Value-added specialty crop products	O	O	O	O	O
Value-added grain products	O	O	O	O	O
Value-added livestock and/or poultry products	O	O	O	O	O
Value-added dairy and/or egg products	O	O	O	O	O
Value-added non-food products like textiles	O	O	O	O	O
Other value-added products	O	O	O	O	O

Q112 What three organic products would you most like to have more price and volume information on?

- First product _____
- Second product _____
- Third product _____

Q113 What additional data coverage would be most useful for your operation?

Q114 What additional data products would be most useful for your operation?

End of Block: Part 4: Your Ideal Organic Commodity Data

Part 5: Setting Prices and Deciding Price Fairness

Q116 This section of the survey focuses on how your operation sets prices and/or decides on fair pricing.

Q51 For each of your purchasing and sales channels, how much control do you feel you or your operation have over pricing of your organic inputs and/or products?

	We have control over setting our own product prices	We try to balance our own price preferences with the price preferences of others and/or the market	We have to accept prices determined by others in the market
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O
Display This Choice: If Q77 = 30 [7] Or Q77 = 30 [8] Or Q77 = 30 [9] Or Q77 = 30 [10] Or Q77 = 31 [7] Or Q77 = 31 [8] Or Q77 = 31 [9] Or Q77 = 31 [10] Purchasing through intermediate channels (wholesalers, distributors, etc.)	O	O	O
Display This Choice: If Q77 = 33 [7] Or Q77 = 33 [8] Or Q77 = 33 [9] Or Q77 = 33 [10] Other purchasing channels	O	O	O
Display This Choice: If Q80 = 52 [7] Or Q80 = 52 [8] Or Q80 = 52 [9] Or Q80 = 52 [10] Sales direct to consumers	O	O	O
Display This Choice: If Q80 = 33 [7] Or Q80 = 33 [8] Or Q80 = 33 [9] Or Q80 = 33 [10] Or Q80 = 50 [7] Or Q80 = 50 [8] Or Q80 = 50 [9] Or Q80 = 50 [10] Sales to institutions or retailers	O	O	O
Display This Choice: If Q80 = 51 [7] Or Q80 = 51 [8] Or Q80 = 51 [9] Or Q80 = 51 [10] Sales to processors or manufacturers	O	O	O
Display This Choice: If Q80 = 60 [7] Or Q80 = 60 [8] Or Q80 = 60 [9] Or Q80 = 60 [10] Other sales channels	O	O	O

Q52 Of the following, which have the largest impact on how much control you feel you or your operation have in setting prices for the raw organic agricultural commodities you purchase? (choose up to 3)

- ☐ Who we sell our products to (consumers vs. institutions vs. retailers, etc.)
- ☐ What product we're selling
- ☐ Consumer demand for and/or trust in organic
- ☐ Environmental or natural impacts on commodity yields (drought, wildfires, invasive pests, etc.)
- ☐ Commodities being close to expiration
- ☐ The spread of invasive pests and/or diseases that impact commodity yields
- ☐ The use and/or availability of data on price and volume of organic commodities across the marketplace
- ☐ The use and/or availability of data on our own business costs

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Q53 Which of the following information sources do you or your operation rely on most to set prices for the raw organic agricultural commodities you purchase and/or evaluate the fairness of an organic product price? (choose up to 3)

- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Individual observations from local markets (produce terminals, wholesale markets, produce departments, etc.)
- ☐ Individual conversations with processors, retailers, or consumers
- ☐ The ability to cover our own business expenses
- ☐ Advice from other wholesalers/distributors in our local marketplace
- ☐ What our counterpart in the sale will accept
- ☐ Market data or information shared from the buyer (retailer/processor)
- ☐ Other information sources (please specify) _____

Q360 For each of your purchasing and sales channels, if you or your operation feel that a price is unfair, how likely are you to decline the sale?

	Not likely at all	Slightly likely	Moderately likely	Very likely	Extremely likely
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 30 [7] Or Q77 = 30 [8] Or Q77 = 30 [9] Or Q77 = 30 [10] Or Q77 = 31 [7] Or Q77 = 31 [8] Or Q77 = 31 [9] Or Q77 = 31 [10] Purchasing through intermediate channels (wholesalers, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q77 = 33 [7] Or Q77 = 33 [8] Or Q77 = 33 [9] Or Q77 = 33 [10] Other purchasing channels	O	O	O	O	O
Display This Choice: If Q80 = 52 [7] Or Q80 = 52 [8] Or Q80 = 52 [9] Or Q80 = 52 [10] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q80 = 33 [7] Or Q80 = 33 [8] Or Q80 = 33 [9] Or Q80 = 33 [10] Or Q80 = 50 [7] Or Q80 = 50 [8] Or Q80 = 50 [9] Or Q80 = 50 [10] Sales to institutions or retailers	O	O	O	O	O
Display This Choice: If Q80 = 51 [7] Or Q80 = 51 [8] Or Q80 = 51 [9] Or Q80 = 51 [10] Sales to processors or manufacturers	O	O	O	O	O
Display This Choice: If Q80 = 60 [7] Or Q80 = 60 [8] Or Q80 = 60 [9] Or Q80 = 60 [10] Other sales channels	O	O	O	O	O

Q361 For each of your purchasing and sales channels, if you or your operation feel that a price is unfair, how confident are you that you can negotiate a fairer price?

	Not confident at all	Slightly confident	Moderately confident	Very confident	Extremely confident
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 30 [7] Or Q77 = 30 [8] Or Q77 = 30 [9] Or Q77 = 30 [10] Or Q77 = 31 [7] Or Q77 = 31 [8] Or Q77 = 31 [9] Or Q77 = 31 [10] Purchasing through intermediate channels (wholesalers, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q77 = 33 [7] Or Q77 = 33 [8] Or Q77 = 33 [9] Or Q77 = 33 [10] Other purchasing channels	O	O	O	O	O
Display This Choice: If Q80 = 52 [7] Or Q80 = 52 [8] Or Q80 = 52 [9] Or Q80 = 52 [10] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q80 = 33 [7] Or Q80 = 33 [8] Or Q80 = 33 [9] Or Q80 = 33 [10] Or Q80 = 50 [7] Or Q80 = 50 [8] Or Q80 = 50 [9] Or Q80 = 50 [10] Sales to institutions or retailers	O	O	O	O	O
Display This Choice: If Q80 = 51 [7] Or Q80 = 51 [8] Or Q80 = 51 [9] Or Q80 = 51 [10] Sales to processors or manufacturers	O	O	O	O	O
Display This Choice: If Q80 = 60 [7] Or Q80 = 60 [8] Or Q80 = 60 [9] Or Q80 = 60 [10] Other sales channels	O	O	O	O	O

Display This Question: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10]

Q56 When negotiating a fairer price for a raw organic agricultural commodity purchased from a farmer using marketing contracts, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other wholesalers/distributors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10]

Q119 When negotiating a fairer price for a raw organic agricultural commodity purchased from a farmer WITHOUT marketing contracts, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other wholesalers/distributors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q77 = 30 [7] Or Q77 = 30 [8] Or Q77 = 30 [9] Or Q77 = 30 [10] Or Q77 = 31 [7] Or Q77 = 31 [8] Or Q77 = 31 [9] Or Q77 = 31 [10]

Q120 When negotiating a fairer price for a raw organic agricultural commodity purchased through intermediate channels, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other wholesalers/distributors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q77 = 33 [7] Or Q77 = 33 [8] Or Q77 = 33 [9] Or Q77 = 33 [10]

Q121 When negotiating a fairer price for a raw organic agricultural commodity purchased through other channels, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other wholesalers/distributors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q80 = 52 [7] Or Q80 = 52 [8] Or Q80 = 52 [9] Or Q80 = 52 [10]

Q122 When negotiating a fairer price for a raw organic agricultural commodity sold directly to consumers, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other wholesalers/distributors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q80 = 33 [7] Or Q80 = 33 [8] Or Q80 = 33 [9] Or Q80 = 33 [10] Or Q80 = 50 [7] Or Q80 = 50 [8] Or Q80 = 50 [9] Or Q80 = 50 [10]

Q123 When negotiating a fairer price for a raw organic agricultural commodity sold to institutions or retailers, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other wholesalers/distributors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q80 = 51 [7] Or Q80 = 51 [8] Or Q80 = 51 [9] Or Q80 = 51 [10]

Q124 When negotiating a fairer price for a raw organic agricultural commodity sold to processors, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other wholesalers/distributors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q80 = 60 [7] Or Q80 = 60 [8] Or Q80 = 60 [9] Or Q80 = 60 [10]

Q125 When negotiating a fairer price for a raw organic agricultural commodity sold through other channels, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other wholesalers/distributors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Q362 For each of your purchasing and sales channels, how helpful would free access to your ideal organic price and volume data (as you described earlier in this survey) be when negotiating for a fairer price?

	Not helpful at all	Slightly helpful	Moderately helpful	Very helpful	Extremely helpful
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 30 [7] Or Q77 = 30 [8] Or Q77 = 30 [9] Or Q77 = 30 [10] Or Q77 = 31 [7] Or Q77 = 31 [8] Or Q77 = 31 [9] Or Q77 = 31 [10] Purchasing through intermediate channels (wholesalers, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q77 = 33 [7] Or Q77 = 33 [8] Or Q77 = 33 [9] Or Q77 = 33 [10] Other purchasing channels	O	O	O	O	O
Display This Choice: If Q80 = 52 [7] Or Q80 = 52 [8] Or Q80 = 52 [9] Or Q80 = 52 [10] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q80 = 33 [7] Or Q80 = 33 [8] Or Q80 = 33 [9] Or Q80 = 33 [10] Or Q80 = 50 [7] Or Q80 = 50 [8] Or Q80 = 50 [9] Or Q80 = 50 [10] Sales to institutions or retailers	O	O	O	O	O
Display This Choice: If Q80 = 51 [7] Or Q80 = 51 [8] Or Q80 = 51 [9] Or Q80 = 51 [10] Sales to processors or manufacturers	O	O	O	O	O
Display This Choice: If Q80 = 60 [7] Or Q80 = 60 [8] Or Q80 = 60 [9] Or Q80 = 60 [10] Other sales channels	O	O	O	O	O

Q127 Is there anything else we should know about what information informs your pricing, purchasing, and/or marketing decisions?

End of Block: Part 5: Setting Prices & Deciding Price Fairness

Part 6: Personal Characteristics and Views

Q58 In this section, we'd like to learn a bit more about you. As a reminder, your responses are strictly confidential and will be anonymized during analysis.

Q65 About how many years have you been involved in organic wholesale/distribution management?

Q67 What is your age group?

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75 or older
- Prefer not to answer

Q68 What best describes the highest level of education you have completed?

- No formal schooling completed
- Some elementary
- Some high-school but no diploma
- Regular high school diploma or GED or alternative credential
- Some college credit, but no degree
- Associates degree (for example: AA, AS)
- Bachelor's degree (for example: BA, BS)
- Master's degree (for example: MA, MS, MEng, MEd, MSW, MBA)
- Professional degree beyond bachelor's degree (for example: MD, DDS, DVM, LLB, JD)
- Doctorate degree (for example, PhD, EdD)
- Prefer not to answer

Q69 Are you (choose all that apply):

- ☐ Female
- ☐ Male
- ☐ Transgender, non-binary, or another gender
- ☐ Prefer not to answer

Q71 What is your race or ethnicity? (choose all that apply)

- ☐ American Indian or Alaska Native
- ☐ Asian
- ☐ Black or African American
- ☐ Hispanic or Latino
- ☐ Middle Eastern or North African
- ☐ Native Hawaiian or Pacific Islander
- ☐ White
- ☐ Prefer not to answer

Q72 What is your national origin?

- o U.S.
- o Non-U.S.
- o Prefer not to answer

Q129 Are there any other details about yourself you'd like to share with us?

End of Block: Part 6: Personal Characteristics & Views

Part 7: Business Characteristics

Q131 In this section, we'd like to learn a bit more about your business / organization. This is the final section of the survey.

Q59 Why organic? What would you consider your organization’s top motivators for participating in the organic industry? (choose up to 3)

- ☐ It is good for the health of farmers, consumers, and/or the soil
- ☐ It helps lower pollution and/or address climate change
- ☐ It is more profitable
- ☐ It is what buyers and/or consumers are demanding
- ☐ It is easier to meet regulatory compliance if I just farm organically
- ☐ It is how I have always farmed
- ☐ Non-organic farm inputs are too expensive
- ☐ It preserves rural life, farming for future generations, and/or family farms
- ☐ It invests in flat/cooperative organizations and/or resists the excesses of industrial agriculture
- ☐ Other (please specify) _____

Q60 If you know, about what year was your operation established? Feel free to give an approximate date

---

Q132 If you know, about what year did your operation first start working with organic products? Feel free to give an approximate date

---

Q61 In which county(s) is your wholesale/distribution operation located? (choose all that apply)

- ☐ Alameda
- ☐ Alpine
- ☐ Amador
- ☐ Butte
- ☐ Calaveras
- ☐ Colusa
- ☐ Contra Costa
- ☐ Del Norte
- ☐ El Dorado
- ☐ Fresno
- ☐ Glenn
- ☐ Humboldt
- ☐ Imperial
- ☐ Inyo
- ☐ Kern
- ☐ Kings
- ☐ Lake
- ☐ Lassen
- ☐ Los Angeles
- ☐ Madera
- ☐ Marin
- ☐ Mariposa
- ☐ Mendocino
- ☐ Merced
- ☐ Modoc
- ☐ Mono
- ☐ Monterey
- ☐ Napa
- ☐ Nevada
- ☐ Orange
- ☐ Placer
- ☐ Plumas
- ☐ Riverside
- ☐ Sacramento
- ☐ San Benito
- ☐ San Bernardino

- ☐ San Diego
- ☐ San Francisco
- ☐ San Joaquin
- ☐ San Luis Obispo
- ☐ San Mateo
- ☐ Santa Barbara
- ☐ Santa Clara
- ☐ Santa Cruz
- ☐ Shasta
- ☐ Sierra
- ☐ Siskiyou
- ☐ Solano
- ☐ Sonoma
- ☐ Stanislaus
- ☐ Sutter
- ☐ Tehama
- ☐ Trinity
- ☐ Tulare
- ☐ Tuolumne
- ☐ Ventura
- ☐ Yolo
- ☐ Yuba
- ☐ Other county(ies) outside of California but in the U.S.
- ☐ Areas in Mexico
- ☐ Areas in Canada
- ☐ Other areas outside of the U.S. (NOT Mexico or Canada)

Q62 What is the ownership structure of your organization?

- ○ Sole proprietorship (without limited liability)
- ○ Partnership (consists of two or more persons as co-owners, without limited liability)
- ○ Family corporation (51% or more of ownership)
- ○ Independent corporation (51% or more is not family owned)
- ○ Cooperative
- ○ Non-profit organization
- ○ Prefer not to answer/not applicable
- ○ Other (please specify) _____

Q82 About how many warehouses does your operation include?

- Only 1
- 2-5
- 6-25
- 26-100
- 101-500
- More than 500

Q64 What best describes your processing operation's gross sales last year?

- Less than $10,000
- $10,000 to $99,999
- $100,000 to $999,999
- $1,000,000 to $9,999,999
- $10,000,000 to $49,999,999
- $50,000,000 to $99,999,999
- $100,000,000 to $249,999,999
- $250,000,000 to $499,999,999
- $500,000,000 or more
- Not sure
- Prefer not to answer

Q133 How many partners own your operation? If you are an owner or owning partner, please include yourself in this count.

▼ 1 (1) ... 10 or more (10)

Q63 Do the owning partners belong to any of the following historically underserved groups? (check all that apply for each partner, including yourself if applicable)

	Veteran	American Indian or Alaska Native	Asian or Pacific Islander	Black or African American	Hispanic or Latino	Woman	None of these	Not sure	Prefer not to answer
Display This Choice: If Q133 >= 1 First partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 2 Second partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 3 Third partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 4 Fourth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 5 Fifth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 6 Sixth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 7 Seventh partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 8 Eighth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 9 Ninth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 = 10 Tenth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐

Q73 OPTIONAL: do you have any suggestions to improve the survey (e.g. a questions was confusing or we forgot to ask something important)? We appreciate your feedback.

Q74 Are you interested in any of the following? (choose all that apply)

- ☐ Being contacted for a follow-up interview and/or participation in a focus group evaluating AMS Market News organic price and volume data (1)
- ☐ Receiving a $40 gift certificate (2)
- ☐ Receiving updates on this research (3)
- ☐ None of the above (4)

Display This Question: If Q74 = 2 And Q74 != 1 And Q74 != 3

Q77 **Please enter your email and information below to receive the $40 e-gift card.**

Important note: ****It may take up to three weeks to distribute e-gift cards.**** Feel free to email us for an update if you have not received your card within that time frame.

Please **double-check before submitting** to ensure accuracy, so we can get your e-gift card to you.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

****TO RECEIVE A GIFT CARD, BE SURE TO (1) VERIFY THIS IS NOT A ROBOTIC SUBMISSION AND (2) CLICK THE RIGHT ARROW BELOW BEFORE CLOSING THIS PAGE.****

- Your name _____
- Your e-mail _____
- Your phone number (in case we need to reach you to verify your email) _____

Display This Question: If Q74 = 1 And Q74 != 2
Or If Q74 = 3 And Q74 != 2

Q76 **Please share the following information** so we can contact you for an interview or focus group participation and/or update you on the results of this research.

Double-check before submitting to ensure accuracy.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

- Your name _____
- Your e-mail _____
- Your phone number (in case we need to reach you to verify your email) _____

Display This Question: If Q74 = 2 And Q74 = 1
Or If Q74 = 2 And Q74 = 3

Q75 **Please enter your email and information below to receive the $40 e-gift card**, so we can contact your for an interview or focus group participation, and/or update you on the results of this research (if those options were selected in the previous question).

Important note: ****It may take up to three weeks to distribute e-gift cards.**** Feel free to email us for an update if you have not received your card within that time frame.

Please **double-check before submitting** to ensure accuracy, so we can get your e-gift card to you.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

****TO RECEIVE A GIFT CARD, BE SURE TO (1) VERIFY THIS IS NOT A ROBOTIC SUBMISSION AND (2) CLICK THE RIGHT ARROW BELOW BEFORE CLOSING THIS PAGE.****

- Your name _____
- Your e-mail _____
- Your phone number (in case we need to reach you to verify your email) _____

End of Block: Part 7: Business Characteristics

Organic Data Collection Gap Analysis Survey for Processors

Part 1: Study Introduction and Consent to Participate

Q3 **Welcome!**
We invite you to take a survey on how organic processors like you use **price and volume data and decide on fair prices** within the organic agriculture industry. Thank you for your participation in this research.

What's the purpose of this research?
The University of California, Davis, Agricultural Sustainability Institute is conducting research to gather information on how famers and businesses in the organic agricultural supply chain use information on product prices so we can make recommendations to the USDA's Agriculture Marketing Service (AMS) to improve its price collection process, website, and publications.

What are the survey questions about?
Our questions are about your processing operation, its role in the organic industry, what organic price and volume data your operation uses when buying raw agricultural products and how you use it, what organic price and volume data would be most useful for your operation, and how you decide on fair pricing for your organic products.

How long will it take to complete?
The survey will take about 15-20 minutes to complete and is completely voluntary. You are welcome to respond to as many questions as you feel comfortable answering. You do not need to answer any questions you do not wish to. You can leave the survey at any time.

Will there be compensation?
The first 100 respondents will receive **a $40 Amazon e-gift card**. You must complete the survey to receive a gift card.

How will confidentiality be ensured?
The survey will ask for some personal information. **Responses will be anonymized prior to analysis and stored in a secure location**. Only the research team will have access to responses and personal identifiers. Any publications will not identify your answers by name or with any other identifying information. This research has been reviewed and approved by an Institutional Review Board (IRB). The IRB is a group of people who oversee research and help protect the rights and welfare of people who participate in research studies like this one.

Dr. Ryan Galt and Dr. Houston Wilson are Principal Investigators on this research, and the United States Department of Agriculture (USDA) provided the funding for this study. **If you have any questions or concerns, please reach out to our primary research contact, Dr. Katie Butterfield at (530) 752-5299 or** klcbutterfield@ucdavis.edu. If you have any questions or concerns about your rights as a participant of this survey, you may contact the UC Davis Office of Research at (916) 703-9158 or hs-irbeducation@ucdavis.edu.

Q4 Clicking the consent button below indicates that you are 18 or older, work for a company or organization that uses or could use USDA AMS organic price and volume data, are not an employee of the US Department of Agriculture, and consent to participate in the survey.

- Yes, I consent to participate in this survey (1)
- No, I do not wish to participate in this survey (2)
- I have already participated in this survey (3)
- I do not quality for this survey (4)

Skip To: End of Survey If Q4 != 1

End of Block: Part 1: Study Introduction & Consent to Participate

Part 2: Your Organization and Its Role in California's Organic Agriculture System

Q91 This section of the survey focuses on your business / organization and its role in California's organic agriculture system.

Q4 Which of the following best describes your primary involvement in California's organic agriculture system?

- Farmer or farm manager (1)
- Wholesaler or Distributor (8)
- Processor that purchases raw agricultural commodities (9)
- Retailer (10)
- None of these (11)
- My involvement in the organic agriculture system is outside of California (12)
- I don't work with organic agriculture (13)

Skip To: End of Survey If Q4 = 11
Skip To: End of Survey If Q4 = 12
Skip To: End of Survey If Q4 = 13

Display This Question: If Q4 = 1

Q5 Please proceed to our survey for organic farmers by following this link: Survey for Farmers

Skip To: End of Survey If Q5 Displayed

Display This Question: If Q4 = 8

Q6 Please proceed to our survey for organic wholesalers and distributors by following this link: Survey for Wholesalers and Distributors

Skip To: End of Survey If Q6 Displayed

Display This Question: If Q4 = 10

Q7 Please proceed to our survey for organic retailers by following this link: Survey for Retailers

Skip To: End of Survey If Q7 Displayed

Q8 What best describes your role in your operation?

- Owner/operator (responsible for day-to-day operations)
- An owning partner (not responsible for day-to-day operations)
- A hired manager
- A hired buyer or salesperson
- Other (please specify) _____

Q9 How many people (including yourself) are involved in day-to-day management of your operation?

Q10 About how many different certified organic raw agricultural commodities does your operation work with?

Q13 About what proportion of the certified organic raw agricultural commodities your operation purchases are each of the following?

	None at all	1-25%	26-50%	51-75%	76-100%
Vegetables	O	O	O	O	O
Fruit (including berries, citrus, other tree fruit, grapes, etc.)	O	O	O	O	O
Nuts	O	O	O	O	O
Grains and/or pulses	O	O	O	O	O
Dairy products and/or eggs	O	O	O	O	O
Meat products	O	O	O	O	O
Cut flowers	O	O	O	O	O
Nursery crops and/or seeds	O	O	O	O	O
Other (please specify)	O	O	O	O	O

Q77 About what proportion of the certified organic raw agricultural commodities your operation buys are purchased directly from each of the following?

	None at all [1]	1-25% [7]	26-50% [8]	51-75% [9]	76-100% [10]
Farmers, using marketing/production contracts (29)	O	O	O	O	O
Farmers, without the use of marketing/production contracts (20)	O	O	O	O	O
Distributors or wholesalers (31)	O	O	O	O	O
Other (please specify) (32)	O	O	O	O	O

Q78 About what percent of the certified organic raw agricultural commodities your operation buys are produced in each of the following geographic areas?

	None at all	1-25%	26-50%	51-75%	76-100%
Within California	O	O	O	O	O
Outside California, but within the U.S.	O	O	O	O	O
Outside the U.S.	O	O	O	O	O

Display This Question: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Or If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10]

Q79 About what percent of the farms your operation buys from are each of the following?

	None at all	1-25%	26-50%	51-75%	76-100%	Not sure
Very small farms (less than about 10 acres)	O	O	O	O	O	O
Small farms (between about 10 and 25 acres)	O	O	O	O	O	O
Mid-size farms (between about 25 and 100 acres)	O	O	O	O	O	O
Large farms (between about 100 and 250 acres)	O	O	O	O	O	O
Very large farms (more than 250 acres)	O	O	O	O	O	O

Q80 About what percent of the organic products your business/organization processes are sold to each of the following?

	None at all [1]	1-25% [7]	26-50% [8]	51-75% [9]	76-100% [10]
Distributors or wholesalers (75)	O	O	O	O	O
Grocery stores, supermarkets, or similar retailers (77)	O	O	O	O	O
Food service providers, restaurants, and/or other institutions (like schools or hospitals) (79)	O	O	O	O	O
Individual consumers (73)	O	O	O	O	O
Other processors and/or manufacturers (outside your organization) (70)	O	O	O	O	O
Other (please specify) (58)	O	O	O	O	O

Q81 About what percent of the organic products your business/organization processes are sold in each of the following geographic areas?

	None at all	1-25%	26-50%	51-75%	76-100%	Not sure
Within California	O	O	O	O	O	O
Outside California, but within the U.S.	O	O	O	O	O	O
Outside the U.S.	O	O	O	O	O	O

Q30 Is your operation part of a business/organization that is also one or more of the following? (Check all that apply)

- ☐ Farm
- ☐ Wholesaler
- ☐ Distributor
- ☐ Retailer
- ☐ Other actor in the organic agriculture supply chain (please specify) _____
- ☐ None of these

Q92 Please list any other sustainable or regenerative food certifications your organization has for your products (other than USDA Organic certification).

End of Block: Part 2: Your Organization & Its Role in California's Organic Agriculture System

Part 3: Your Use of Organic Price and Volume Data

Q1 This section of the survey focuses on your use of organic price and volume data/information, including Agricultural Marketing Service (AMS) Market News organic data.

Q2 Do you or others in your operation regularly use data on organic prices and/or volumes (including data your own business/organization tracks and/or data from outside organizations)?

- Yes (1)
- No (2)

Skip To: Q17 If Q2 = 2

Q3 Of the following, what sources of organic price and volume data do you or others in your operation reference most? (choose up to 3)
If you regularly reference one or more data sources not listed here, please use the "Other" options below to tell us what these are.

- ☐ USDA Agricultural Marketing Service (AMS) Market News Organic Price and Volume Data (1)
- ☐ USDA National Agricultural Statistics Service (NASS) Census of Agriculture and/or its data products
- ☐ Organic Farmers Agency for Relationship Marketing (OFARM)
- ☐ Mercaris, Inc.
- ☐ Organic Grain Research and Information Network (OGRAIN)
- ☐ Organic Trade Association (OTA)
- ☐ Maine Organic Farmers and Gardeners Association (MOFGA) Organic Price Reports
- ☐ Data your own business / organization tracks about its operations
- ☐ Information from distributors or wholesalers outside your organization
- ☐ Information from retailers outside your organization
- ☐ Other1 (please specify) _____
- ☐ Other2 (please specify) _____
- ☐ Other3 (please specify) _____

Display This Question: If Q3 Count Is Greater Than or Equal to 2
Carry Forward Selected Choices - Entered Text from "Q3"

Q4 How useful do you find each of these data sources for your operation?

	Most useful [11]	*Display This Answer: If Q3 Count Is Greater Than or Equal to 2* Second most useful [12]	*Display This Answer: If Q3 Count Is Greater Than or Equal to 3* Third most useful [13]
USDA Agricultural Marketing Service (AMS) Market News Organic Price and Volume Data	O	O	O
USDA National Agricultural Statistics Service (NASS) Census of Agriculture and/or its data products	O	O	O
Organic Farmers Agency for Relationship Marketing (OFARM)	O	O	O
Mercaris, Inc.	O	O	O
Organic Grain Research and Information Network (OGRAIN)	O	O	O
Organic Trade Association (OTA)	O	O	O
Maine Organic Farmers and Gardeners Association (MOFGA) Organic Price Reports	O	O	O
Data your own business / organization tracks about its operations	O	O	O
Information from distributors or wholesalers outside your organization	O	O	O
Information from retailers outside your organization	O	O	O
Other1 (please specify)	O	O	O
Other2 (please specify)	O	O	O
Other3 (please specify)	O	O	O

Display This Question: If Q3 Count Is Equal to 1

Q5 About how often do you or others in your operation receive updates to data from {Q3 Choice}?

- Daily
- Weekly
- Monthly
- Quarterly
- Seasonally
- Yearly
- Less often than yearly

Display This Question: If Q3 Count Is Equal to 1

Q6 What aspects of your operation are impacted by data from {Q3 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 Count Is Equal to 1

Q7 How do you or others in your operation currently access data from {Q3 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q7 = 1 Or Q7 = 18 Or Q7 = 19 Or Q7 = 20 Or Q7 = 21 Or Q7 = 22 Or Q7 = 23 Or Q7 = 24 Or Q7 = 25 Or Q7 = 31

Q95 In what format do you or others in your operation usually access data from {Q3 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q95 Count Is Greater Than 0

Carry Forward Selected Choices from "Q95"

Q96 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q3 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q8 About how often do you or others in your operation receive updates to data from {Q4 = 11 Choice}?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q9 What aspects of your business are impacted by data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q10 How do you or others in your operation currently access data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q10 = 1 Or Q10 = 18 Or Q10 = 19 Or Q10 = 20 Or Q10 = 21 Or Q10 = 22 Or Q10 = 23 Or Q10 = 24 Or Q10 = 25 Or Q10 = 31

Q98 In what format do you or others in your operation usually access data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q98Count Is Greater Than 0

Carry Forward Selected Choices from "Q98"

Q99 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q4 = 11 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 12

Q11 About how often do you or others in your operation receive updates to data from {Q4 = 12 Choice}?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 12

Q12 What aspects of your business are impacted by data from {Q$ = 12 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 12

Q13 How do you or others in your operation currently access data from {Q4 == 12 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q13 = 1 Or Q13 = 18 Or Q13 = 19 Or Q13 = 20 Or Q13 = 21 Or Q13 = 22 Or Q13 = 23 Or Q13 = 24 Or Q13 = 25 Or Q13 = 31

Q102 In what format do you or others in your operation usually access data from {Q4 = 12 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q102 Count Is Greater Than 0

Carry Forward Selected Choices from "Q102"

Q101 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q4 = 12 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 3 And Q4 = 13

Q14 About how often do you or others in your operation receive updates to data from {Q4 = 13 Choices}?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly

Display This Question: If Q3 Count Is Greater Than or Equal to 3 And Q4 = 13

Q15 What aspects of your business are impacted by data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 Count Is Greater Than or Equal to 3 And Q4 = 13

Q16 How do you or others in your operation currently access data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q16 = 1 Or Q16 = 18 Or Q16 = 19 Or Q16 = 20 Or Q16 = 21 Or Q16 = 22 Or Q16 = 23 Or Q16 = 24 Or Q16 = 25 Or Q16 = 31

Q105 In what format do you or others in your operation usually access data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q105 Count Is Greater Than 0
Carry Forward Selected Choices from "Q105"

Q104 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q4 = 13 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 != 1

Q17 In general, how familiar are you with USDA Agriculture Marketing Service (AMS) Market News agricultural data?

- o Not familiar at all (1)
- o Slightly familiar (2)
- o Moderately familiar (3)
- o Very familiar (4)
- o Extremely familiar (5)

Display This Question: If Q3 != 1 And Q17 != 1

Q18 How familiar are you with the organic agriculture price and volume data available through AMS Market News?

- o Not familiar at all (1)
- o Slightly familiar (2)
- o Moderately familiar (3)
- o Very familiar (4)
- o Extremely familiar (5)

Display This Question: If Q3 != 1
And If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5
And If Q18 = 2 Or Q18 = 3 Or Q18 = 4 Or Q18 = 5

Q19 Of the following, which business functions are informed most by Market News organic price and volume data within your operation? (choose up to 3)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 != 1
And If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5
And If Q18 = 2 Or Q18 = 3 Or Q18 = 4 Or Q18 = 5

Q20 How satisfied are you with each of the following aspects of AMS Market News organic price and volume data?

	Unsatisfied	Somewhat unsatisfied	Neutral / mixed feelings	Somewhat satisfied	Satisfied	Not applicable
These data are available and/or updated as often as we need	O	O	O	O	O	O
These data cover the right products	O	O	O	O	O	O
These data cover the right geographic area(s)	O	O	O	O	O	O
These data are easy to access	O	O	O	O	O	O
These data are accurate	O	O	O	O	O	O
These data are easy to understand and interpret	O	O	O	O	O	O
We are able to use these data the way we want to	O	O	O	O	O	O
These data work well with automated reports we use or want to use	O	O	O	O	O	O

Display This Question: If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5 Or If Q3 = 1

Q21 Do you or others in your operation regularly refer to Market News non-organic data to make business decisions?

- Yes (1)
- No (2)

Display This Question: If Q21 = 1

Q107 What business decisions are informed by AMS Market News non-organic data?

End of Block: Part 3: Your use of Organic Price & Volume Data

Part 4: Your Ideal Organic Commodity Data

Q109 This section of the survey focuses on what your ideal organic price and volume data would look like.

Q110 How important to your operation are each of the following aspects of organic price and volume data?

	Not at all important	Of minor importance	Moderately important	Important BUT NOT essential for using the data	Important AND essential for using the data	Not applicable
The data are available and/or updated as often as we need	O	O	O	O	O	O
The data cover the right products	O	O	O	O	O	O
The data cover the right geographic area(s)	O	O	O	O	O	O
The data are easy to access	O	O	O	O	O	O
The data are accurate	O	O	O	O	O	O
The data are easy to understand and interpret	O	O	O	O	O	O
We are able to use the data the way we want to	O	O	O	O	O	O
The data work well with automated reports we use or want to use	O	O	O	O	O	O

Q22 How would you most like to access and/or receive data updates? (choose up to 3)

- ☐ Email (1)
- ☐ Website (2)
- ☐ Smartphone app (3)
- ☐ Social media (Facebook, Instagram, etc.) (4)
- ☐ Phone call (5)
- ☐ Radio (6)
- ☐ Podcast (7)
- ☐ In-person (8)
- ☐ Printed materials (9)
- ☐ Automated data updated that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (10)
- ☐ Other (please specify) (15) _____
- ☐ We're not interested in these data (16)

Display This Question: If Q22 = 1 Or Q22 = 2 Or Q22 = 3 Or Q22 = 4 Or Q22 = 5 Or Q22 = 6 Or Q22 = 7 Or Q22 = 8 Or Q22 = 9 Or Q22 = 15

Q23 What data format do you prefer? (choose up to 3)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q23 Count Is Greater Than 0
Carry Forward Selected Choices from "Q23"

Q111 For each of the data formats you just selected, which level of detail would you prefer the data to have? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Q24 How frequently would your operation benefit from updates to organic price and volume data?

- Daily
- Weekly
- Monthly
- Quarterly
- Seasonally
- Yearly
- Less often than yearly
- We're not interested in these data

Q25 How useful would additional data on organic products in each of the following categories be to your operation?

	Not at all useful	Slightly useful	Moderately useful	Very useful	Extremely useful
Major specialty crops	O	O	O	O	O
Major grain crops	O	O	O	O	O
Other crops	O	O	O	O	O
Livestock and/or poultry	O	O	O	O	O
Dairy and/or eggs	O	O	O	O	O
Non-food commodities like cotton or other fibers	O	O	O	O	O
Value-added specialty crop products	O	O	O	O	O
Value-added grain products	O	O	O	O	O
Value-added livestock and/or poultry products	O	O	O	O	O
Value-added dairy and/or egg products	O	O	O	O	O
Value-added non-food products like textiles	O	O	O	O	O
Other value-added products	O	O	O	O	O

Q112 What three organic products would you most like to have more price and volume information on?

- First product _____
- Second product _____
- Third product _____

Q113 What additional data coverage would be most useful for your operation?

Q114 What additional data products would be most useful for your operation?

End of Block: Part 4: Your Ideal Organic Commodity Data

Part 5: Setting Prices and Deciding Price Fairness

Q116 This section of the survey focuses on how your operation sets prices and/or decides on fair pricing.

Q51 For each of your purchasing and sales channels, how much control do you feel you or your operation have over pricing of your organic inputs and/or products?

	We have control over setting our own product prices	We try to balance our own price preferences with the price preferences of others and/or the market	We have to accept prices determined by others in the market
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O
Display This Choice: If Q77 = 31 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing through intermediate channels (wholesalers, distributors, etc.)	O	O	O
Display This Choice: If Q77 = 32 [7] Or Q77 = 32 [8] Or Q77 = 32 [9] Or Q77 = 32 [10] Other purchasing channels	O	O	O
Display This Choice: If Q80 = 73 [7] Or Q80 = 73 [8] Or Q80 = 73 [9] Or Q80 = 73 [10] Sales direct to consumers	O	O	O
Display This Choice: If Q80 = 77 [7] Or Q80 = 77 [8] Or Q80 = 77 [9] Or Q80 = 77 [10] Or Q80 = 79 [7] Or Q80 = 79 [8] Or Q80 = 79 [9] Or Q80 = 79 [10] Sales to institutions or retailers	O	O	O
Display This Choice: If Q80 = 75 [7] Or Q80 = 75 [8] Or Q80 = 75 [9] Or Q80 = 75 [10] Or Q80 = 70 [7] Or Q80 = 70 [8] Or Q80 = 70 [9] Or Q80 = 70 [10] Sales through intermediate channels (wholesalers, distributors, etc.)	O	O	O
Display This Choice: If Q80 = 58 [7] Or Q80 = 58 [8] Or Q80 = 58 [9] Or Q80 = 58 [10] Other sales channels	O	O	O

Q52 Of the following, which have the largest impact on how much control you feel you or your operation have in setting prices for the raw organic agricultural commodities you purchase? (choose up to 3)

- ☐ Who we sell our products to (wholesalers vs. institutions vs. retailers, etc.)
- ☐ What product we're selling
- ☐ Consumer demand for and/or trust in organic
- ☐ Environmental or natural impacts on commodity yields (drought, wildfires, invasive pests, etc.)
- ☐ Commodities being close to expiration
- ☐ The spread of invasive pests and/or diseases that impact commodity yields
- ☐ The use and/or availability of data on price and volume of organic commodities across the marketplace
- ☐ The use and/or availability of data on our own business costs

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Q53 Which of the following information sources do you or your operation rely on most to set prices for the raw organic agricultural commodities you purchase and/or evaluate the fairness of an organic product price? (choose up to 3)

- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Individual observations from local markets (produce terminals, wholesale markets, produce departments, etc.)
- ☐ Individual conversations with distributors/wholesalers, retailers, or consumers
- ☐ The ability to cover our own business expenses
- ☐ Advice from other processors in our local marketplace
- ☐ What our counterpart in the sale will accept
- ☐ Market data or information shared from the buyer (wholesaler/distributor/retailer)
- ☐ Other information sources (please specify) _____

Q117 For each of your purchasing and sales channels, if you or your operation feel that a price is unfair, how likely are you to decline the sale?

	Not likely at all	Slightly likely	Moderately likely	Very likely	Extremely likely
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 31 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing through intermediate channels (wholesalers, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q77 = 32 [7] Or Q77 = 32 [8] Or Q77 = 32 [9] Or Q77 = 32 [10] Other purchasing channels	O	O	O	O	O
Display This Choice: If Q80 = 73 [7] Or Q80 = 73 [8] Or Q80 = 73 [9] Or Q80 = 73 [10] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q80 = 77 [7] Or Q80 = 77 [8] Or Q80 = 77 [9] Or Q80 = 77 [10] Or Q80 = 79 [7] Or Q80 = 79 [8] Or Q80 = 79 [9] Or Q80 = 79 [10] Sales to institutions or retailers	O	O	O	O	O
Display This Choice: If Q80 = 75 [7] Or Q80 = 75 [8] Or Q80 = 75 [9] Or Q80 = 75 [10] Or Q80 = 70 [7] Or Q80 = 70 [8] Or Q80 = 70 [9] Or Q80 = 70 [10] Sales through intermediate channels (wholesalers, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q80 = 58 [7] Or Q80 = 58 [8] Or Q80 = 58 [9] Or Q80 = 58 [10] Other sales channels	O	O	O	O	O

Q118 For each of your purchasing and sales channels, if you or your operation feel that a price is unfair, how confident are you that you can negotiate a fairer price?

	Not confident at all	Slightly confident	Moderately confident	Very confident	Extremely confident
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 31 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing through intermediate channels (wholesalers, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q77 = 32 [7] Or Q77 = 32 [8] Or Q77 = 32 [9] Or Q77 = 32 [10] Other purchasing channels	O	O	O	O	O
Display This Choice: If Q80 = 73 [7] Or Q80 = 73 [8] Or Q80 = 73 [9] Or Q80 = 73 [10] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q80 = 77 [7] Or Q80 = 77 [8] Or Q80 = 77 [9] Or Q80 = 77 [10] Or Q80 = 79 [7] Or Q80 = 79 [8] Or Q80 = 79 [9] Or Q80 = 79 [10] Sales to institutions or retailers	O	O	O	O	O
Display This Choice: If Q80 = 75 [7] Or Q80 = 75 [8] Or Q80 = 75 [9] Or Q80 = 75 [10] Or Q80 = 70 [7] Or Q80 = 70 [8] Or Q80 = 70 [9] Or Q80 = 70 [10] Sales through intermediate channels (wholesalers, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q80 = 58 [7] Or Q80 = 58 [8] Or Q80 = 58 [9] Or Q80 = 58 [10] Other sales channels	O	O	O	O	O

Display This Question: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10]

Q56 When negotiating a fairer price for a raw organic agricultural commodity purchased from a farmer using marketing contracts, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other processors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10]

Q119 When negotiating a fairer price for a raw organic agricultural commodity purchased from a farmer WITHOUT marketing contracts, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other processors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q77 = 31 [7] Or Q77 = 31 [8] Or Q77 = 31 [9] Or Q77 = 31 [10]

Q120 When negotiating a fairer price for a raw organic agricultural commodity purchased through intermediate channels, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other processors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q77 = 32 [7] Or Q77 = 32 [8] Or Q77 = 32 [9] Or Q77 = 32 [10]

Q121 When negotiating a fairer price for a raw organic agricultural commodity purchased through other channels, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other processors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q80 = 73 [7] Or Q80 = 73 [8] Or Q80 = 73 [9] Or Q80 = 73 [10]

Q122 When negotiating a fairer price for a raw organic agricultural commodity sold directly to consumers, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other processors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q80 = 77 [7] Or Q80 = 77 [8] Or Q80 = 77 [9] Or Q80 = 77 [10] Or Q80 = 79 [7] Or Q80 = 79 [8] Or Q80 = 79 [9] Or Q80 = 79 [10]

Q123 When negotiating a fairer price for a raw organic agricultural commodity sold to institutions or retailers, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other processors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q80 = 70 [7] Or Q80 = 70 [8] Or Q80 = 70 [9] Or Q80 = 70 [10] Or Q80 = 75 [7] Or Q80 = 75 [8] Or Q80 = 75 [9] Or Q80 = 75 [10]

Q124 When negotiating a fairer price for a raw organic agricultural commodity sold through intermediate channels, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other processors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q80 = 58 [7] Or Q80 = 58 [8] Or Q80 = 58 [9] Or Q80 = 58 [10]

Q125 When negotiating a fairer price for a raw organic agricultural commodity sold through other channels, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other processors in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Q126 For each of your purchasing and sales channels, how helpful would free access to your ideal organic price and volume data (as you described earlier in this survey) be when negotiating for a fairer price?

	Not helpful at all	Slightly helpful	Moderately helpful	Very helpful	Extremely helpful
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 31 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing through intermediate channels (wholesalers, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q77 = 32 [7] Or Q77 = 32 [8] Or Q77 = 32 [9] Or Q77 = 32 [10] Other purchasing channels	O	O	O	O	O
Display This Choice: If Q80 = 73 [7] Or Q80 = 73 [8] Or Q80 = 73 [9] Or Q80 = 73 [10] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q80 = 77 [7] Or Q80 = 77 [8] Or Q80 = 77 [9] Or Q80 = 77 [10] Or Q80 = 79 [7] Or Q80 = 79 [8] Or Q80 = 79 [9] Or Q80 = 79 [10] Sales to institutions or retailers	O	O	O	O	O
Display This Choice: If Q80 = 75 [7] Or Q80 = 75 [8] Or Q80 = 75 [9] Or Q80 = 75 [10] Or Q80 = 70 [7] Or Q80 = 70 [8] Or Q80 = 70 [9] Or Q80 = 70 [10] Sales through intermediate channels (wholesalers, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q80 = 58 [7] Or Q80 = 58 [8] Or Q80 = 58 [9] Or Q80 = 58 [10] Other sales channels	O	O	O	O	O

Q127 Is there anything else we should know about what information informs your pricing, purchasing, and/or marketing decisions?

End of Block: Part 5: Setting Prices & Deciding Price Fairness

Part 6: Personal Characteristics and Views

Q58 In this section, we'd like to learn a bit more about you. As a reminder, your responses are strictly confidential and will be anonymized during analysis.

Q65 About how many years have you been involved in organic processing?

Q67 What is your age group?

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75 or older
- Prefer not to answer

Q68 What best describes the highest level of education you have completed?

- No formal schooling completed
- Some elementary
- Some high-school but no diploma
- Regular high school diploma or GED or alternative credential
- Some college credit, but no degree
- Associates degree (for example: AA, AS)
- Bachelor's degree (for example: BA, BS)
- Master's degree (for example: MA, MS, MEng, MEd, MSW, MBA)
- Professional degree beyond bachelor's degree (for example: MD, DDS, DVM, LLB, JD)
- Doctorate degree (for example, PhD, EdD)
- Prefer not to answer

Q69 Are you (choose all that apply):

- ☐ Female
- ☐ Male
- ☐ Transgender, non-binary, or another gender
- ☐ Prefer not to answer

Q71 What is your race or ethnicity? (choose all that apply)

- ☐ American Indian or Alaska Native
- ☐ Asian
- ☐ Black or African American
- ☐ Hispanic or Latino
- ☐ Middle Eastern or North African
- ☐ Native Hawaiian or Pacific Islander
- ☐ White
- ☐ Prefer not to answer

Q72 What is your national origin?

- o U.S.
- o Non-U.S.
- o Prefer not to answer

Q129 Are there any other details about yourself you'd like to share with us?

End of Block: Part 6: Personal Characteristics & Views

Part 7: Business Characteristics

Q131 In this section, we'd like to learn a bit more about your business / organization. This is the final section of the survey.

Q59 Why organic? What would you consider your organization’s top motivators for participating in the organic industry? (choose up to 3)

- ☐ It is good for the health of farmers, consumers, and/or the soil
- ☐ It helps lower pollution and/or address climate change
- ☐ It is more profitable
- ☐ It is what buyers and/or consumers are demanding
- ☐ It is easier to meet regulatory compliance if I just farm organically
- ☐ It is how I have always farmed
- ☐ Non-organic farm inputs are too expensive
- ☐ It preserves rural life, farming for future generations, and/or family farms
- ☐ It invests in flat/cooperative organizations and/or resists the excesses of industrial agriculture
- ☐ Other (please specify) _____

Q60 If you know, about what year was your processing operation established? Feel free to give an approximate date

---

Q132 If you know, about what year did your processing operation receive its first organic certification? Feel free to give an approximate date

---

Q61 In which county(s) is your processing operation located? (choose all that apply)

- ☐ Alameda
- ☐ Alpine
- ☐ Amador
- ☐ Butte
- ☐ Calaveras
- ☐ Colusa
- ☐ Contra Costa
- ☐ Del Norte
- ☐ El Dorado
- ☐ Fresno
- ☐ Glenn
- ☐ Humboldt
- ☐ Imperial
- ☐ Inyo
- ☐ Kern
- ☐ Kings
- ☐ Lake
- ☐ Lassen
- ☐ Los Angeles
- ☐ Madera
- ☐ Marin
- ☐ Mariposa
- ☐ Mendocino
- ☐ Merced
- ☐ Modoc
- ☐ Mono
- ☐ Monterey
- ☐ Napa
- ☐ Nevada
- ☐ Orange
- ☐ Placer
- ☐ Plumas
- ☐ Riverside
- ☐ Sacramento
- ☐ San Benito
- ☐ San Bernardino

- ☐ San Diego
- ☐ San Francisco
- ☐ San Joaquin
- ☐ San Luis Obispo
- ☐ San Mateo
- ☐ Santa Barbara
- ☐ Santa Clara
- ☐ Santa Cruz
- ☐ Shasta
- ☐ Sierra
- ☐ Siskiyou
- ☐ Solano
- ☐ Sonoma
- ☐ Stanislaus
- ☐ Sutter
- ☐ Tehama
- ☐ Trinity
- ☐ Tulare
- ☐ Tuolumne
- ☐ Ventura
- ☐ Yolo
- ☐ Yuba
- ☐ Other county(ies) outside of California but in the U.S.
- ☐ Areas in Mexico
- ☐ Areas in Canada
- ☐ Other areas outside of the U.S. (NOT Mexico or Canada)

Q62 What is the ownership structure of your organization?

- ○ Sole proprietorship (without limited liability)
- ○ Partnership (consists of two or more persons as co-owners, without limited liability)
- ○ Family corporation (51% or more of ownership)
- ○ Independent corporation (51% or more is not family owned)
- ○ Cooperative
- ○ Non-profit organization
- ○ Prefer not to answer/not applicable
- ○ Other (please specify) _____

Q82 About how many processing facilities does your operation include?

- Only 1
- 2-5
- 6-25
- 26-100
- More than 100

Q64 What best describes your processing operation's gross sales last year?

- Less than $10,000
- $10,000 to $99,999
- $100,000 to $999,999
- $1,000,000 to $9,999,999
- $10,000,000 to $49,999,999
- $50,000,000 to $99,999,999
- $100,000,000 to $249,999,999
- $250,000,000 to $499,999,999
- $500,000,000 or more
- Not sure
- Prefer not to answer

Q133 How many partners own your operation? If you are an owner or owning partner, please include yourself in this count.

▼ 1 (1) ... 10 or more (10)

Q63 Do the owning partners belong to any of the following historically underserved groups? (check all that apply for each partner, including yourself if applicable)

	Veteran	American Indian or Alaska Native	Asian or Pacific Islander	Black or African American	Hispanic or Latino	Woman	None of these	Not sure	Prefer not to answer
Display This Choice: If Q133 >= 1 First partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 2 Second partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 3 Third partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 4 Fourth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 5 Fifth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 6 Sixth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 7 Seventh partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 8 Eighth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 9 Ninth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 = 10 Tenth partner	☐	☐	☐	☐	☐	☐	☐	☐	☐

Q73 OPTIONAL: do you have any suggestions to improve the survey (e.g. a questions was confusing or we forgot to ask something important)? We appreciate your feedback.

Q74 Are you interested in any of the following? (choose all that apply)

- ☐ Being contacted for a follow-up interview and/or participation in a focus group evaluating AMS Market News organic price and volume data (1)
- ☐ Receiving a $40 gift certificate (2)
- ☐ Receiving updates on this research (3)
- ☐ None of the above (4)

Display This Question: If Q74 = 2 And Q74 != 1 And Q74 != 3

Q77 **Please enter your email and information below to receive the $40 e-gift card.**

Important note: ****It may take up to three weeks to distribute e-gift cards.**** Feel free to email us for an update if you have not received your card within that time frame.

Please **double-check before submitting** to ensure accuracy, so we can get your e-gift card to you.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

****TO RECEIVE A GIFT CARD, BE SURE TO (1) VERIFY THIS IS NOT A ROBOTIC SUBMISSION AND (2) CLICK THE RIGHT ARROW BELOW BEFORE CLOSING THIS PAGE.****

- Your name _____
- Your e-mail _____
- Your phone number (in case we need to reach you to verify your email) _____

Display This Question: If Q74 = 1 And Q74 != 2
Or If Q74 = 3 And Q74 != 2

Q76 **Please share the following information** so we can contact you for an interview or focus group participation and/or update you on the results of this research.

Double-check before submitting to ensure accuracy.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

- Your name _____
- Your e-mail _____
- Your phone number (in case we need to reach you to verify your email) _____

Display This Question: If Q74 = 2 And Q74 = 1
Or If Q74 = 2 And Q74 = 3

Q75 **Please enter your email and information below to receive the $40 e-gift card**, so we can contact your for an interview or focus group participation, and/or update you on the results of this research (if those options were selected in the previous question).

Important note: ****It may take up to three weeks to distribute e-gift cards.**** Feel free to email us for an update if you have not received your card within that time frame.

Please **double-check before submitting** to ensure accuracy, so we can get your e-gift card to

you.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

****TO RECEIVE A GIFT CARD, BE SURE TO (1) VERIFY THIS IS NOT A ROBOTIC SUBMISSION AND (2) CLICK THE RIGHT ARROW BELOW BEFORE CLOSING THIS PAGE.****

- Your name _____
- Your e-mail _____
- Your phone number (in case we need to reach you to verify your email) _____

End of Block: Part 7: Business Characteristics

Organic Data Collection Gap Analysis Survey for Retailers

Part 1: Study Introduction and Consent to Participate

Q3 **Welcome!**
We invite you to take a survey on how organic retailers like you use **price and volume data and decide on fair prices** within the organic agriculture industry. Thank you for your participation in this research.

What's the purpose of this research?
The University of California, Davis, Agricultural Sustainability Institute is conducting research to gather information on how famers and businesses in the organic agricultural supply chain use information on product prices so we can make recommendations to the USDA's Agriculture Marketing Service (AMS) to improve its price collection process, website, and publications.

What are the survey questions about?
Our questions are about your retail operation, its role in the organic industry, what organic price and volume data your operation uses when buying products and how you use it, what organic price and volume data would be most useful for your operation, and how you decide on fair pricing for your organic products.

How long will it take to complete?
The survey will take about 15-20 minutes to complete and is completely voluntary. You are welcome to respond to as many questions as you feel comfortable answering. You do not need to answer any questions you do not wish to. You can leave the survey at any time.

Will there be compensation?
The first 100 respondents will receive **a $40 Amazon e-gift card**. You must complete the survey to receive a gift card.

How will confidentiality be ensured?
The survey will ask for some personal information. **Responses will be anonymized prior to analysis and stored in a secure location**. Only the research team will have access to responses and personal identifiers. Any publications will not identify your answers by name or with any other identifying information. This research has been reviewed and approved by an Institutional Review Board (IRB). The IRB is a group of people who oversee research and help protect the rights and welfare of people who participate in research studies like this one.

Dr. Ryan Galt and Dr. Houston Wilson are Principal Investigators on this research, and the United States Department of Agriculture (USDA) provided the funding for this study. **If you have any questions or concerns, please reach out to our primary research contact, Dr. Katie Butterfield at (530) 752-5299 or** klcbutterfield@ucdavis.edu. If you have any questions or concerns about your rights as a participant of this survey, you may contact the UC Davis Office of Research at (916) 703-9158 or hs-irbeducation@ucdavis.edu.

Q4 Clicking the consent button below indicates that you are 18 or older, are a retailer or manage a retail operation that uses or could use USDA AMS organic price and volume data, are not an employee of the US Department of Agriculture, and consent to participate in the survey.

- Yes, I consent to participate in this survey (1)
- No, I do not wish to participate in this survey (2)
- I have already participated in this survey (3)
- I do not quality for this survey (4)

Skip To: End of Survey If Q4 != 1

End of Block: Part 1: Study Introduction & Consent to Participate

Part 2: Your Organization and Its Role in California's Organic Agriculture System

Q89 This section of the survey focuses on your business / organization and its role in California's organic agriculture system.

Q4 Which of the following best describes your primary involvement in California’s organic agriculture system?

- Farmer or farm manager (1)
- Wholesaler or Distributor (8)
- Processor that purchases raw agricultural commodities (9)
- Retailer (10)
- None of these (11)
- My involvement in the organic agriculture system is outside of California (12)
- I don’t work with organic agriculture (13)

Skip To: End of Survey If Q4 = 11
Skip To: End of Survey If Q4 = 12
Skip To: End of Survey If Q4 = 13

Display This Question: If Q4 = 1

Q5 Please proceed to our survey for organic farmers by following this link: Survey for Farmers

Skip To: End of Survey If Q5 Displayed

Display This Question: If Q4 = 8

Q6 Please proceed to our survey for organic wholesalers and distributors by following this link: Survey for Wholesalers and Distributors

Skip To: End of Survey If Q6 Displayed

Display This Question: If Q4 = 9

Q7 Please proceed to our survey for organic processors by following this link: Survey for Processors

Skip To: End of Survey If Q7 Displayed

Q8 What best describes your role in your operation?

- Owner/operator (responsible for day-to-day operations)
- An owning partner (not responsible for day-to-day operations)
- A hired manager
- A hired buyer or salesperson
- Other (please specify) _____

Q9 How many people (including yourself) are involved in day-to-day management of your operation?

Q10 About how many different certified organic products does your organization sell?

Q13 About what percent of the certified organic products your organization regularly sells are each of the following?

	None at all	1-25%	26-50%	51-75%	76-100%
Vegetables	O	O	O	O	O
Fruit (including berries, citrus, other tree fruit, grapes, etc.)	O	O	O	O	O
Nuts	O	O	O	O	O
Grains and/or pulses	O	O	O	O	O
Dairy products and/or eggs	O	O	O	O	O
Meat products	O	O	O	O	O
Cut flowers	O	O	O	O	O
Nursery crops and/or seeds	O	O	O	O	O
Value-added products	O	O	O	O	O
Other (please specify)	O	O	O	O	O

Q77 About what proportion of the certified organic products your operation sells do you purchase directly from each of the following?

	None at all [1]	About 1-25% [7]	About 26-50% [8]	About 51-75% [9]	About 76-100% [10]
Farmers, using marketing/production contracts (29)	O	O	O	O	O
Farmers, without the use of marketing/production contracts (20)	O	O	O	O	O
Processors (30)	O	O	O	O	O
Distributors or wholesalers (31)	O	O	O	O	O
Other (please specify) (32)	O	O	O	O	O

Q78 About what percent of the certified organic products your organization purchases are produced in each of the following geographic areas?

	None at all	About 1-25%	About 26-50%	About 51-75%	About 76-100%
Within California	O	O	O	O	O
Outside California, but within the U.S.	O	O	O	O	O
Outside the U.S.	O	O	O	O	O
Not sure	O	O	O	O	O

Display This Question: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Or If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10]

Q79 About what percent of the organic farms your operation buys from are each of the following?

	None at all	About 1-25%	About 26-50%	About 51-75%	About 76-100%	Not sure
Very small farms (less than about 10 acres)	O	O	O	O	O	O
Small farms (between about 10 and 25 acres)	O	O	O	O	O	O
Mid-size farms (between about 25 and 100 acres)	O	O	O	O	O	O
Large farms (between about 100 and 250 acres)	O	O	O	O	O	O
Very large farms (more than 250 acres)	O	O	O	O	O	O

Q80 About what percent of the organic products your business/organization sells are sold to each of the following?

	None at all [1]	About 1-25% [7]	About 26-50% [8]	About 51-75% [9]	About 76-100% [10]
Individual consumers (61)	O	O	O	O	O
Food service providers (33)	O	O	O	O	O
Restaurants (60)	O	O	O	O	O
Schools and/or hospitals (59)	O	O	O	O	O
Other (please specify) (58)	O	O	O	O	O

Q91 About what percent of the organic products your business/organization sells are sold in each of the following geographic areas?

	None at all	1-25%	26-50%	51-75%	76-100%	Not sure
Within California	O	O	O	O	O	O
Outside California, but within the U.S.	O	O	O	O	O	O
Outside the U.S.	O	O	O	O	O	O

Q30 Is your operation part of an organization that is also one or more of the following? (Check all that apply)

- ☐ Farm
- ☐ Wholesaler or distributor
- ☐ Value-added processor
- ☐ Other actor in the organic agriculture supply chain (please specify) _____
- ☐ None of these

Q92 If your organization seeks to sell products with other sustainable or regenerative food certifications (other than USDA Organic certification), please list those certifications here.

End of Block: Part 2: Your Organization & Its Role in California's Organic Agriculture System

Part 3: Your Use of Organic Price and Volume Data

Q1 This section of the survey focuses on your use of organic price and volume data / information, including Agricultural Marketing Service (AMS) Market News organic data.

Q2 Do you or others in your operation regularly use data on organic prices and/or volumes (including data your own business/organization tracks and/or data from outside organizations)?

- Yes (1)
- No (2)

Skip To: Q17 If Q2 = 2

Q3 Of the following, what sources of organic price and volume data do you or others in your operation reference most? (choose up to 3)
If you regularly reference one or more data sources not listed here, please use the "Other" options below to tell us what these are.

- ☐ USDA Agricultural Marketing Service (AMS) Market News Organic Price and Volume Data (1)
- ☐ USDA National Agricultural Statistics Service (NASS) Census of Agriculture and/or its data products
- ☐ SPINS
- ☐ Nielsen
- ☐ Organic Farmers Agency for Relationship Marketing (OFARM)
- ☐ Mercaris, Inc.
- ☐ Organic Grain Research and Information Network (OGRAIN)
- ☐ Organic Trade Association (OTA)
- ☐ Maine Organic Farmers and Gardeners Association (MOFGA) Organic Price Reports
- ☐ Data your own business / organization tracks about its operations
- ☐ Information from distributors or wholesalers outside your organization
- ☐ Information from retailers outside your organization
- ☐ Other1 (please specify) _____
- ☐ Other2 (please specify) _____
- ☐ Other3 (please specify) _____

Display This Question: If Q3 Count Is Greater Than or Equal to 2
Carry Forward Selected Choices - Entered Text from "Q3"

Q4 How useful do you find each of these data sources for your operation?

	Most useful [11]	*Display This Answer: If Q3 Count Is Greater Than or Equal to 2* Second most useful [12]	*Display This Answer: If Q3 Count Is Greater Than or Equal to 3* Third most useful [13]
USDA Agricultural Marketing Service (AMS) Market News Organic Price and Volume Data	O	O	O
USDA National Agricultural Statistics Service (NASS) Census of Agriculture and/or its data products	O	O	O
SPINS	O	O	O
Nielsen	O	O	O
Organic Farmers Agency for Relationship Marketing (OFARM)	O	O	O
Mercaris, Inc.	O	O	O
Organic Grain Research and Information Network (OGRAIN)	O	O	O
Organic Trade Association (OTA)	O	O	O
Maine Organic Farmers and Gardeners Association (MOFGA) Organic Price Reports	O	O	O
Data your own business / organization tracks about its operations	O	O	O
Information from distributors or wholesalers outside your organization	O	O	O
Information from retailers outside your organization	O	O	O
Other1 (please specify)	O	O	O
Other2 (please specify)	O	O	O
Other3 (please specify)	O	O	O

Display This Question: If Q3 Count Is Equal to 1

Q5 About how often do you or others in your operation receive updates to data from {Q3 Choice}?

- Daily
- Weekly
- Monthly
- Quarterly
- Seasonally
- Yearly
- Less often than yearly

Display This Question: If Q3 Count Is Equal to 1

Q6 What aspects of your operation are impacted by data from {Q3 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 Count Is Equal to 1

Q7 How do you or others in your operation currently access data from {Q3 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q7 = 1 Or Q7 = 18 Or Q7 = 19 Or Q7 = 20 Or Q7 = 21 Or Q7 = 22 Or Q7 = 23 Or Q7 = 24 Or Q7 = 25 Or Q7 = 31

Q95 In what format do you or others in your operation usually access data from {Q3 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q95 Count Is Greater Than 0
Carry Forward Selected Choices from "Q95"

Q96 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q3 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q8 About how often do you or others in your operation receive updates to data from {Q4 = 11 Choice}?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q9 What aspects of your business are impacted by data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 11

Q10 How do you or others in your operation currently access data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q10 = 1 Or Q10 = 18 Or Q10 = 19 Or Q10 = 20 Or Q10 = 21 Or Q10 = 22 Or Q10 = 23 Or Q10 = 24 Or Q10 = 25 Or Q10 = 31

Q98 In what format do you or others in your operation usually access data from {Q4 = 11 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q98 Count Is Greater Than 0
Carry Forward Selected Choices from "Q98"

Q99 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q4 = 11 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 12

Q11 About how often do you or others in your operation receive updates to data from {Q4 = 12 Choice}?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly

Display This Question: If Q3 Count Is Greater Than or Equal to 2 And Q4 = 12

Q12 What aspects of your business are impacted by data from {Q4 = 12 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3Count Is Greater Than or Equal to 2 And Q4 = 12

Q13 How do you or others in your operation currently access data from {Q4 = 12 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q13 = 1 Or Q13 = 18 Or Q13 = 19 Or Q13 = 20 Or Q13 = 21 Or Q13 = 22 Or Q13 = 23 Or Q13 = 24 Or Q13 = 25 Or Q13 = 31

Q102 In what format do you or others in your operation usually access data from {Q4 = 12 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q102 Count Is Greater Than 0
Carry Forward Selected Choices from "Q102"

Q101 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q4 = 12 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 Count Is Greater Than or Equal to 3 And Q4 = 13

Q14 About how often do you or others in your operation receive updates to data from {Q4 = 13 Choice}?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly

Display This Question: If Q3 Count Is Greater Than or Equal to 3 And Q4 = 13

Q15 What aspects of your business are impacted by data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Count Is Greater Than or Equal to 3 And Q4 = 13

Q16 How do you or others in your operation currently access data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Email (1)
- ☐ Website (18)
- ☐ Smartphone app (19)
- ☐ Social media (Facebook, Instagram, etc.) (20)
- ☐ Phone call (21)
- ☐ Radio (22)
- ☐ Podcast (23)
- ☐ In-person (24)
- ☐ Printed materials (25)
- ☐ Automated data updates that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (26)
- ☐ Other (please specify) (31) _____

Display This Question: If Q16 = 1 Or Q16 = 18 Or Q16 = 19 Or Q16 = 20 Or Q16 = 21 Or Q16 = 22 Or Q16 = 23 Or Q16 = 24 Or Q16 = 25 Or Q16 = 31

Q105 In what format do you or others in your operation usually access data from {Q4 = 13 Choice}? (choose all that apply)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q105 Count Is Greater Than 0
Carry Forward Selected Choices from "Q105"

Q104 For each of the data formats you just selected, which level of detail is the data you or others in your operation usually access from {Q4 = 13 Choice}? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Display This Question: If Q3 != 1

Q17 In general, how familiar are you with USDA Agriculture Marketing Service (AMS) Market News agricultural data?

- o Not familiar at all (1)
- o Slightly familiar (2)
- o Moderately familiar (3)
- o Very familiar (4)
- o Extremely familiar (5)

Display This Question: If Q3 != 1 And Q17 != 1

Q18 How familiar are you with the organic agriculture price and volume data available through AMS Market News?

- o Not familiar at all (1)
- o Slightly familiar (2)
- o Moderately familiar (3)
- o Very familiar (4)
- o Extremely familiar (5)

Display This Question: If Q3 != 1
And If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5
And If Q18 = 2 Or Q18 = 3 Or Q18 = 4 Or Q18 = 5

Q19 Of the following, which business functions are informed most by Market News organic price and volume data within your operation? (choose up to 3)

- ☐ Evaluating market conditions, identifying market trends, and/or monitoring price patterns
- ☐ Setting prices for organic products
- ☐ Determining if we're receiving or offering a fair price for organic products
- ☐ Making purchasing decisions
- ☐ Adjusting our own organic production or purchasing volumes
- ☐ Evaluating transportation and/or equipment needs
- ☐ Assessing movement of organic products like ours
- ☐ Planning for the future of our business
- ☐ Advertising or promoting our organic products
- ☐ Making other business decisions
- ☐ None of these

Display This Question: If Q3 != 1
And If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5
And If Q18 = 2 Or Q18 = 3 Or Q18 = 4 Or Q18 = 5

Q20 How satisfied are you with each of the following aspects of AMS Market News organic price and volume data?

	Unsatisfied	Somewhat unsatisfied	Neutral / mixed feelings	Somewhat satisfied	Satisfied	Not applicable
These data are available and/or updated as often as we need	O	O	O	O	O	O
These data cover the right products	O	O	O	O	O	O
These data cover the right geographic area(s)	O	O	O	O	O	O
These data are easy to access	O	O	O	O	O	O
These data are accurate	O	O	O	O	O	O
These data are easy to understand and interpret	O	O	O	O	O	O
We are able to use these data the way we want to	O	O	O	O	O	O
These data work well with automated reports we use or want to use	O	O	O	O	O	O

Display This Question: If Q17 = 2 Or Q17 = 3 Or Q17 = 4 Or Q17 = 5 Or If Q3 = 1

Q21 Do you or others in your operation regularly refer to Market News non-organic data to make business decisions?

- Yes (1)
- No (2)

Display This Question: If Q21 = 1

Q107 What business decisions are informed by AMS Market News non-organic data?

End of Block: Part 3: Your use of Organic Price & Volume Data

Part 4: Your Ideal Organic Commodity Data

Q109 This section of the survey focuses on what your ideal organic price and volume data would look like.

Q110 How important to your operation are each of the following aspects of organic price and volume data?

	Not at all important	Of minor importance	Moderately important	Important BUT NOT essential for using the data	Important AND essential for using the data	Not applicable
The data are available and/or updated as often as we need	O	O	O	O	O	O
The data cover the right products	O	O	O	O	O	O
The data cover the right geographic area(s)	O	O	O	O	O	O
The data are easy to access	O	O	O	O	O	O
The data are accurate	O	O	O	O	O	O
The data are easy to understand and interpret	O	O	O	O	O	O
We are able to use the data the way we want to	O	O	O	O	O	O
The data work well with automated reports we use or want to use	O	O	O	O	O	O

Q22 How would you most like to access and/or receive data updates? (choose up to 3)

- ☐ Email (1)
- ☐ Website (2)
- ☐ Smartphone app (3)
- ☐ Social media (Facebook, Instagram, etc.) (4)
- ☐ Phone call (5)
- ☐ Radio (6)
- ☐ Podcast (7)
- ☐ In-person (8)
- ☐ Printed materials (9)
- ☐ Automated data updated that allow us to maintain our own data tables, visualizations, and/or reports (i.e. via API) (10)
- ☐ Other (please specify) (15) _____
- ☐ We're not interested in these data (16)

Display This Question: If Q22 = 1 Or Q22 = 2 Or Q22 = 3 Or Q22 = 4 Or Q22 = 5 Or Q22 = 6 Or Q22 = 7 Or Q22 = 8 Or Q22 = 9 Or Q22 = 15

Q23 What data format do you prefer? (choose up to 3)

- ☐ Standardized/Static audio format (like recordings)
- ☐ Standardized/Static visual format (like reports or figures)
- ☐ Standardized/Static mixed audio/visual format (like informational videos)
- ☐ Interactive audio format (like conversations)
- ☐ Interactive visual format (like live dashboards)
- ☐ Interactive mixed audio/visual format (like presentations)

Display This Question: If Q23 Count Is Greater Than 0
Carry Forward Selected Choices from "Q23"

Q111 For each of the data formats you just selected, which level of detail would you prefer the data to have? (choose all that apply)

	Individual data points (like the price of a commodity at a specific time/place)	Individual data points with some explanation	Summary data (like the average price of a commodity over time)	Summary data with some explanation
Standardized/Static audio format (like recordings)	☐	☐	☐	☐
Standardized/Static visual format (like reports or figures)	☐	☐	☐	☐
Standardized/Static mixed audio/visual format (like informational videos)	☐	☐	☐	☐
Interactive audio format (like conversations)	☐	☐	☐	☐
Interactive visual format (like live dashboards)	☐	☐	☐	☐
Interactive mixed audio/visual format (like presentations)	☐	☐	☐	☐

Q24 How frequently would your operation benefit from updates to organic price and volume data?

- ○ Daily
- ○ Weekly
- ○ Monthly
- ○ Quarterly
- ○ Seasonally
- ○ Yearly
- ○ Less often than yearly
- ○ We're not interested in these data

Q25 How useful would additional data on organic products in each of the following categories be to your operation?

	Not at all useful	Slightly useful	Moderately useful	Very useful	Extremely useful
Major specialty crops	O	O	O	O	O
Major grain crops	O	O	O	O	O
Other crops	O	O	O	O	O
Livestock and/or poultry	O	O	O	O	O
Dairy and/or eggs	O	O	O	O	O
Non-food commodities like cotton or other fibers	O	O	O	O	O
Value-added specialty crop products	O	O	O	O	O
Value-added grain products	O	O	O	O	O
Value-added livestock and/or poultry products	O	O	O	O	O
Value-added dairy and/or egg products	O	O	O	O	O
Value-added non-food products like textiles	O	O	O	O	O
Other value-added products	O	O	O	O	O

Q112 What three organic products would you most like to have more price and volume information on?

- First product _____
- Second product _____
- Third product _____

Q113 What additional data coverage would be most useful for your operation?

Q114 What additional data products would be most useful for your operation?

End of Block: Part 4: Your Ideal Organic Commodity Data

Part 5: Setting Prices and Deciding Price Fairness

Q116 This section of the survey focuses on how your operation sets prices and/or decides on fair pricing.

Q51 For each of your purchasing and sales channels, how much control do you feel you or your operation have over pricing of your organic inputs and/or products?

	We have control over setting our own product prices	We try to balance our own price preferences with the price preferences of others and/or the market	We have to accept prices determined by others in the market
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O
Display This Choice: If Q77 = 30 [7] Or Q77 = 30 [8] Or Q77 = 30 [9] Or Q77 = 30 [10] Or Q77 = 31 [7] Or Q77 = 31 [8] Or Q77 = 31 [9] Or Q77 = 31 [10] Purchasing through intermediate channels (processors, distributors, etc.)	O	O	O
Display This Choice: If Q77 = 32 [7] Or Q77 = 32 [8] Or Q77 = 32 [9] Or Q77 = 32 [10] Other purchasing channels	O	O	O
Display This Choice: If Q80 = 61 [7] Or Q80 = 61 [8] Or Q80 = 61 [9] Or Q80 = 61 [10] Sales direct to consumers	O	O	O
Display This Choice: If Q80 = 33 [7] Or Q80 = 33 [8] Or Q80 = 33 [9] Or Q80 = 33 [10] Or Q80 = 59 [7] Or Q80 = 59 [8] Or Q80 = 59 [9] Or Q80 = 59 [10] Or Q80 = 60 [7] Or Q80 = 60 [8] Or Q80 = 60 [9] Or Q80 = 60 [10] Sales to institutions (food services, restaurants, etc.)	O	O	O
Display This Choice: If Q80 = 58 [7] Or Q80 = 58 [8] Or Q80 = 58 [9] Or Q80 = 58 [10] Other sales channels	O	O	O

Q52 Of the following, which have the largest impact on how much control you feel you or your operation have in setting prices for the raw organic agricultural commodities you purchase? (choose up to 3)

- ☐ Who we sell our products to
- ☐ What product we're buying
- ☐ Consumer demand for and/or trust in organic
- ☐ Environmental or natural impacts on commodity yields (drought, wildfires, invasive pests, etc.)
- ☐ Commodities being close to expiration
- ☐ The spread of invasive pests and/or diseases that impact commodity yields
- ☐ The use and/or availability of data on price and volume of organic commodities across the marketplace
- ☐ The use and/or availability of data on our own business costs

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Q53 Which of the following information sources do you or your operation rely on most to set prices for the raw organic agricultural commodities you purchase and/or evaluate the fairness of an organic product price? (choose up to 3)

- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Individual observations from local markets (produce terminals, wholesale markets, produce departments, etc.)
- ☐ Individual conversations with distributors/wholesalers, farmers, or processors
- ☐ The ability to cover our own business expenses
- ☐ Advice from other retailers in our local marketplace
- ☐ What our counterpart in the sale will accept
- ☐ Other information sources (please specify) _____

Q300 For each of your purchasing and sales channels, if you or your operation feel that a price is unfair, how likely are you to decline the sale?

	Not likely at all	Slightly likely	Moderately likely	Very likely	Extremely likely
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 30 [7] Or Q77 = 30 [8] Or Q77 = 30 [9] Or Q77 = 30 [10] Or Q77 = 31 [7] Or Q77 = 31 [8] Or Q77 = 31 [9] Or Q77 = 31 [10] Purchasing through intermediate channels (processors, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q77 = 32 [7] Or Q77 = 32 [8] Or Q77 = 32 [9] Or Q77 = 32 [10] Other purchasing channels	O	O	O	O	O
Display This Choice: If Q80 = 61 [7] Or Q80 = 61 [8] Or Q80 = 61 [9] Or Q80 = 61 [10] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q80 = 33 [7] Or Q80 = 33 [8] Or Q80 = 33 [9] Or Q80 = 33 [10] Or Q80 = 59 [7] Or Q80 = 59 [8] Or Q80 = 59 [9] Or Q80 = 59 [10] Or Q80 = 60 [7] Or Q80 = 60 [8] Or Q80 = 60 [9] Or Q80 = 60 [10] Sales to institutions (food services, restaurants, etc.)	O	O	O	O	O
Display This Choice: If Q80 = 58 [7] Or Q80 = 58 [8] Or Q80 = 58 [9] Or Q80 = 58 [10] Other sales channels	O	O	O	O	O

Q301 For each of your purchasing and sales channels, if you or your operation feel that a price is unfair, how confident are you that you can negotiate a fairer price?

	Not confident at all	Slightly confident	Moderately confident	Very confident	Extremely confident
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 30 [7] Or Q77 = 30 [8] Or Q77 = 30 [9] Or Q77 = 30 [10] Or Q77 = 31 [7] Or Q77 = 31 [8] Or Q77 = 31 [9] Or Q77 = 31 [10] Purchasing through intermediate channels (processors, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q77 = 32 [7] Or Q77 = 32 [8] Or Q77 = 32 [9] Or Q77 = 32 [10] Other purchasing channels	O	O	O	O	O
Display This Choice: If Q80 = 61 [7] Or Q80 = 61 [8] Or Q80 = 61 [9] Or Q80 = 61 [10] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q80 = 33 [7] Or Q80 = 33 [8] Or Q80 = 33 [9] Or Q80 = 33 [10] Or Q80 = 59 [7] Or Q80 = 59 [8] Or Q80 = 59 [9] Or Q80 = 59 [10] Or Q80 = 60 [7] Or Q80 = 60 [8] Or Q80 = 60 [9] Or Q80 = 60 [10] Sales to institutions (food services, restaurants, etc.)	O	O	O	O	O
Display This Choice: If Q80 = 58 [7] Or Q80 = 58 [8] Or Q80 = 58 [9] Or Q80 = 58 [10] Other sales channels	O	O	O	O	O

Display This Question: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10]

Q56 When negotiating a fairer price for a raw organic agricultural commodity purchased from a farmer using marketing contracts, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other retailers in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10]

Q119 When negotiating a fairer price for a raw organic agricultural commodity purchased from a farmer WITHOUT marketing contracts, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other retailers in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q77 = 30 [7] Or Q77 = 30 [8] Or Q77 = 30 [9] Or Q77 = 30 [10] Or Q77 = 31 [7] Or Q77 = 31 [8] Or Q77 = 31 [9] Or Q77 = 31 [10]

Q120 When negotiating a fairer price for a raw organic agricultural commodity purchased through intermediate channels, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other retailers in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q77 = 32 [7] Or Q77 = 32 [8] Or Q77 = 32 [9] Or Q77 = 32 [10]

Q121 When negotiating a fairer price for a raw organic agricultural commodity purchased through other channels, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other retailers in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q80 = 61 [7] Or Q80 = 61 [8] Or Q80 = 61 [9] Or Q80 = 61 [10]

Q122 When negotiating a fairer price for a raw organic agricultural commodity sold directly to consumers, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other retailers in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q80 = 33 [7] Or Q80 = 33 [8] Or Q80 = 33 [9] Or Q80 = 33 [10] Or Q80 = 33 [10] Or Q80 = 59 [7] Or Q80 = 59 [8] Or Q80 = 59 [9] Or Q80 = 59 [10] Or Q80 = 60 [7]Or Q80 = 60 [8] Or Q80 = 60 [9] Or Q80 = 60 [10]

Q123 When negotiating a fairer price for a raw organic agricultural commodity sold to institutions, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other retailers in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don't feel we can negotiate a fairer price

Display This Question: If Q80 = 58 [7] Or Q80 = 58 [8] Or Q80 = 58 [9] Or Q80 = 58 [10]

Q125 When negotiating a fairer price for a raw organic agricultural commodity sold through other channels, what resources do you or your operation primarily rely on? (choose up to 3)

- ☐ Information from counterpart in the sale
- ☐ Information from other retailers in our network
- ☐ Our own negotiation skills
- ☐ Organic price and volume data from AMS Market News
- ☐ Non-organic price and volume data from AMS Market News
- ☐ Organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Non-organic price and volume data from other sources (NOT from AMS Market News)
- ☐ Information about our business expenses
- ☐ Data we have collected through tracking our own products
- ☐ I don’t feel we can negotiate a fairer price

Q302 For each of your purchasing and sales channels, how helpful would free access to your ideal organic price and volume data (as you described earlier in this survey) be when negotiating for a fairer price?

	Not helpful at all	Slightly helpful	Moderately helpful	Very helpful	Extremely helpful
Display This Choice: If Q77 = 29 [7] Or Q77 = 29 [8] Or Q77 = 29 [9] Or Q77 = 29 [10] Purchasing from farmers using marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 20 [7] Or Q77 = 20 [8] Or Q77 = 20 [9] Or Q77 = 20 [10] Purchasing from farmers without marketing contracts	O	O	O	O	O
Display This Choice: If Q77 = 30 [7] Or Q77 = 30 [8] Or Q77 = 30 [9] Or Q77 = 30 [10] Or Q77 = 31 [7] Or Q77 = 31 [8] Or Q77 = 31 [9] Or Q77 = 31 [10] Purchasing through intermediate channels (processors, distributors, etc.)	O	O	O	O	O
Display This Choice: If Q77 = 32 [7] Or Q77 = 32 [8] Or Q77 = 32 [9] Or Q77 = 32 [10] Other purchasing channels	O	O	O	O	O
Display This Choice: If Q80 = 61 [7] Or Q80 = 61 [8] Or Q80 = 61 [9] Or Q80 = 61 [10] Sales direct to consumers	O	O	O	O	O
Display This Choice: If Q80 = 33 [7] Or Q80 = 33 [8] Or Q80 = 33 [9] Or Q80 = 33 [10] Or Q80 = 59 [7] Or Q80 = 59 [8] Or Q80 = 59 [9] Or Q80 = 59 [10] Or Q80 = 60 [7] Or Q80 = 60 [8] Or Q80 = 60 [9] Or Q80 = 60 [10] Sales to institutions (food services, restaurants, etc.)	O	O	O	O	O
Display This Choice: If Q80 = 58 [7] Or Q80 = 58 [8] Or Q80 = 58 [9] Or Q80 = 58 [10] Other sales channels	O	O	O	O	O

Q127 Is there anything else we should know about what information informs your pricing, purchasing, and/or marketing decisions?

End of Block: Part 5: Setting Prices & Deciding Price Fairness

Part 6: Personal Characteristics and Views

Q58 In this section, we'd like to learn a bit more about you. As a reminder, your responses are strictly confidential and will be anonymized during analysis.

Q65 About how many years have you been involved in organic retail management?

Q67 What is your age group?

- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75 or older
- Prefer not to answer

Q68 What best describes the highest level of education you have completed?

- No formal schooling completed
- Some elementary
- Some high-school but no diploma
- Regular high school diploma or GED or alternative credential
- Some college credit, but no degree
- Associates degree (for example: AA, AS)
- Bachelor's degree (for example: BA, BS)
- Master's degree (for example: MA, MS, MEng, MEd, MSW, MBA)
- Professional degree beyond bachelor's degree (for example: MD, DDS, DVM, LLB, JD)
- Doctorate degree (for example, PhD, EdD)
- Prefer not to answer

Q69 Are you (choose all that apply):

- ☐ Female
- ☐ Male
- ☐ Transgender, non-binary, or another gender
- ☐ Prefer not to answer

Q71 What is your race or ethnicity? (choose all that apply)

- ☐ American Indian or Alaska Native
- ☐ Asian
- ☐ Black or African American
- ☐ Hispanic or Latino
- ☐ Middle Eastern or North African
- ☐ Native Hawaiian or Pacific Islander
- ☐ White
- ☐ Prefer not to answer

Q72 What is your national origin?

- ○ U.S.
- ○ Non-U.S.
- ○ Prefer not to answer

Q129 Are there any other details about yourself you'd like to share with us?

End of Block: Part 6: Personal Characteristics & Views

Part 7: Business Characteristics

Q131 In this section, we'd like to learn a bit more about your business / organization. This is the final section of the survey.

Q59 Why organic? What would you consider your organization’s top motivators for participating in the organic industry? (choose up to 3)

- ☐ It is good for the health of farmers, consumers, and/or the soil
- ☐ It helps lower pollution and/or address climate change
- ☐ It is more profitable
- ☐ It is what buyers and/or consumers are demanding
- ☐ It is easier to meet regulatory compliance if I just farm organically
- ☐ It is how I have always farmed
- ☐ Non-organic farm inputs are too expensive
- ☐ It preserves rural life, farming for future generations, and/or family farms
- ☐ It invests in flat/cooperative organizations and/or resists the excesses of industrial agriculture
- ☐ Other (please specify) _____

Q60 If you know, about what year was your retail operation established? Feel free to give an approximate date

Q132 If you know, about what year did your retail operation first start selling organic products? Feel free to give an approximate date

Q61 In which county(s) is your processing operation located? (choose all that apply)

- ☐ Alameda
- ☐ Alpine
- ☐ Amador
- ☐ Butte
- ☐ Calaveras
- ☐ Colusa
- ☐ Contra Costa
- ☐ Del Norte
- ☐ El Dorado
- ☐ Fresno
- ☐ Glenn
- ☐ Humboldt
- ☐ Imperial
- ☐ Inyo
- ☐ Kern
- ☐ Kings
- ☐ Lake
- ☐ Lassen
- ☐ Los Angeles
- ☐ Madera

- ☐ Marin
- ☐ Mariposa
- ☐ Mendocino
- ☐ Merced
- ☐ Modoc
- ☐ Mono
- ☐ Monterey
- ☐ Napa
- ☐ Nevada
- ☐ Orange
- ☐ Placer
- ☐ Plumas
- ☐ Riverside
- ☐ Sacramento
- ☐ San Benito
- ☐ San Bernardino
- ☐ San Diego
- ☐ San Francisco
- ☐ San Joaquin
- ☐ San Luis Obispo
- ☐ San Mateo
- ☐ Santa Barbara
- ☐ Santa Clara
- ☐ Santa Cruz
- ☐ Shasta
- ☐ Sierra
- ☐ Siskiyou
- ☐ Solano
- ☐ Sonoma
- ☐ Stanislaus
- ☐ Sutter
- ☐ Tehama
- ☐ Trinity
- ☐ Tulare
- ☐ Tuolumne
- ☐ Ventura
- ☐ Yolo
- ☐ Yuba
- ☐ Other county(ies) outside of California but in the U.S.
- ☐ Areas in Mexico
- ☐ Areas in Canada
- ☐ Other areas outside of the U.S. (NOT Mexico or Canada)

Q62 What is the ownership structure of your organization?

- Sole proprietorship (without limited liability)
- Partnership (consists of two or more persons as co-owners, without limited liability)
- Family corporation (51% or more of ownership)
- Independent corporation (51% or more is not family owned)
- Cooperative
- Non-profit organization
- Prefer not to answer/not applicable
- Other (please specify) _____

Q82 About how many retail stores does your operation include?

- Only 1
- 2-5
- 6-25
- 26-100
- 101-500
- 501-1,000
- More than 1,000

Q64 What best describes your retail operation's gross sales last year?

- Less than $10,000
- $10,000 to $99,999
- $100,000 to $999,999
- $1,000,000 to $9,999,999
- $10,000,000 to $49,999,999
- $50,000,000 to $99,999,999
- $100,000,000 to $249,999,999
- $250,000,000 to $499,999,999
- $500,000,000 or more
- Not sure
- Prefer not to answer

Q133 How many partners own your operation? If you are an owner or owning partner, please include yourself in this count.

▼ 1 (1) ... 10 or more (10)

Q63 Do the owning partners belong to any of the following historically underserved groups? (check all that apply for each partner, including yourself if applicable)

	Veteran	American Indian or Alaska Native	Asian or Pacific Islander	Black or African American	Hispanic or Latino	Woman	None of these	Not sure	Prefer not to answer
Display This Choice: If Q133 >= 1 First partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 2 Second partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 3 Third partner	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 4 Fourth partner (8)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 5 Fifth partner (9)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 6 Sixth partner (4)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 7 Seventh partner (5)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 8 Eighth partner (10)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 >= 9 Ninth partner (6)	☐	☐	☐	☐	☐	☐	☐	☐	☐
Display This Choice: If Q133 = 10 Tenth partner (7)	☐	☐	☐	☐	☐	☐	☐	☐	☐

Q73 OPTIONAL: do you have any suggestions to improve the survey (e.g. a questions was confusing or we forgot to ask something important)? We appreciate your feedback.

Q74 Are you interested in any of the following? (choose all that apply)

- ☐ Being contacted for a follow-up interview and/or participation in a focus group evaluating AMS Market News organic price and volume data (1)
- ☐ Receiving a $40 gift certificate (2)
- ☐ Receiving updates on this research (3)
- ☐ None of the above (4)

Display This Question: If Q74 = 2 And Q74 != 1 And Q74 != 3

Q77 **Please enter your email and information below to receive the $40 e-gift card.**

Important note: ****It may take up to three weeks to distribute e-gift cards.**** Feel free to email us for an update if you have not received your card within that time frame.

Please **double-check before submitting** to ensure accuracy, so we can get your e-gift card to you.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

****TO RECEIVE A GIFT CARD, BE SURE TO (1) VERIFY THIS IS NOT A ROBOTIC SUBMISSION AND (2) CLICK THE RIGHT ARROW BELOW BEFORE CLOSING THIS PAGE.****

- Your name _____
- Your e-mail _____
- Your phone number (in case we need to reach you to verify your email) _____

Display This Question: If Q74 = 1 And Q74 != 2
Or If Q74 = 3 And Q74 != 2

Q76 **Please share the following information** so we can contact you for an interview or focus group participation and/or update you on the results of this research.

Double-check before submitting to ensure accuracy.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

- Your name _____
- Your e-mail _____
- Your phone number (in case we need to reach you to verify your email) _____

Display This Question: If Q74 = 2 And Q74 = 1
Or If Q74 = 2 And Q74 = 3

Q75 **Please enter your email and information below to receive the $40 e-gift card**, so we can contact your for an interview or focus group participation, and/or update you on the results of this research (if those options were selected in the previous question).

Important note: ****It may take up to three weeks to distribute e-gift cards.**** Feel free to email us for an update if you have not received your card within that time frame.

Please **double-check before submitting** to ensure accuracy, so we can get your e-gift card to you.

Confidentiality reminder: Emails will be collected in our encrypted data base, will not be shared with any third party vendors, and will be delinked from your responses prior to analysis.

****TO RECEIVE A GIFT CARD, BE SURE TO (1) VERIFY THIS IS NOT A ROBOTIC SUBMISSION AND (2) CLICK THE RIGHT ARROW BELOW BEFORE CLOSING THIS PAGE.****

- Your name _____
- Your e-mail _____
- Your phone number (in case we need to reach you to verify your email) _____

End of Block: Part 7: Business Characteristics

Appendix C: Postcards

UCDAVIS AGRICULTURAL SUSTAINABILITY INSTITUTE

UNIVERSITY OF CALIFORNIA Agriculture and Natural Resources
Organic Agriculture Institute

Agricultural Sustainability Institute
UC Davis
One Shields Ave
Davis, CA 95616

Make your voice heard in shaping the USDA's organic Market News data!

Haga que su voz se oiga y se tenga en cuenta en el diseño del Magazine de Mercado de Productos Orgánicos del Departamento de Agricultura de los Estados Unidos!

[ORG_NAME]
[ADDRESS], [ADDRESS2]
[CITY], [STATE] [ZIPCODE]

Do you produce, purchase, or sell certified organic agricultural products?

We want to hear from YOU!

Tell us what organic price and volume information you want. **Follow the QR code or visit bit.ly/UCD-Ag-Survey to complete our survey** if you haven't already.

Respond early to receive a **$40 Amazon e-gift card**!

Questions? Contact Dr. Katie Butterfield:
klcbutterfield@ucdavis.edu (530) 752-5299

¿Produce, compra o vende productos agrícolas orgánicos certificados?

Queremos escucharle!

Cuéntenos la información que desee compartirnos en cuanto al precio y volumen de productos orgánicos. **Siga el código QR o visite bit.ly/UCD-Ag-Survey para completar la encuesta** si aún no lo ha hecho.

Sea parte de quienes responden primero y recibirá una **tarjeta de regalo electrónica de Amazon por $40**!

Preguntas? Contacte a la Dr. Katie Butterfield:
klcbutterfield@ucdavis.edu (530) 752-5299

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