#IBCSurvey

@AgsafeOz
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IBC CONTAINER SURVEY FOR FARMING GROUPS

Agsafe

RESULTS SNAPSHOT

IBC CONTAINER SURVEY RESULTS

There were **393 survey respondents**. Respondents were able to give multiple responses to some questions, which has skewed the percentages represented on some of the results. Six questions related to statistical data (state, ag sector, farming organisation membership), these results have been aggregated to remove any identifying information. Twelve questions with qualitative data.

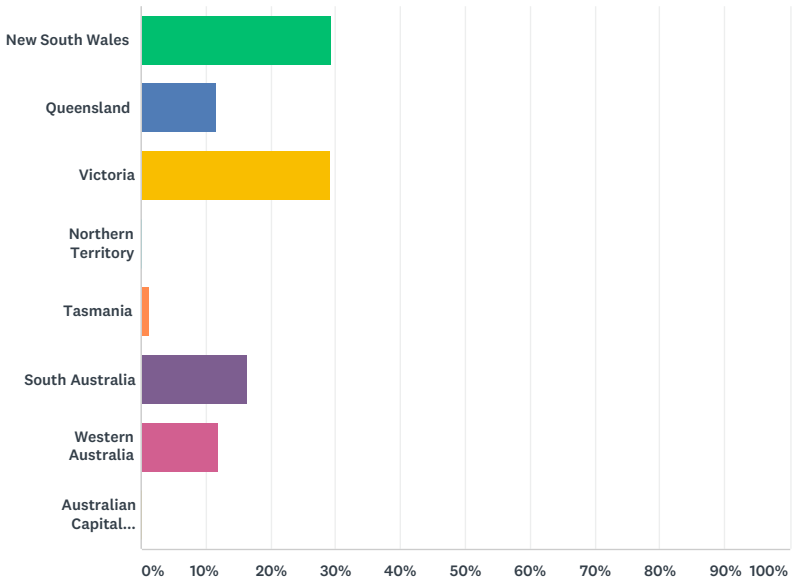
STATISTICAL QUESTIONS

Please indicate which organisation you are a member:

Majority of respondents identified with one or more farming organisations, the 4 top being:

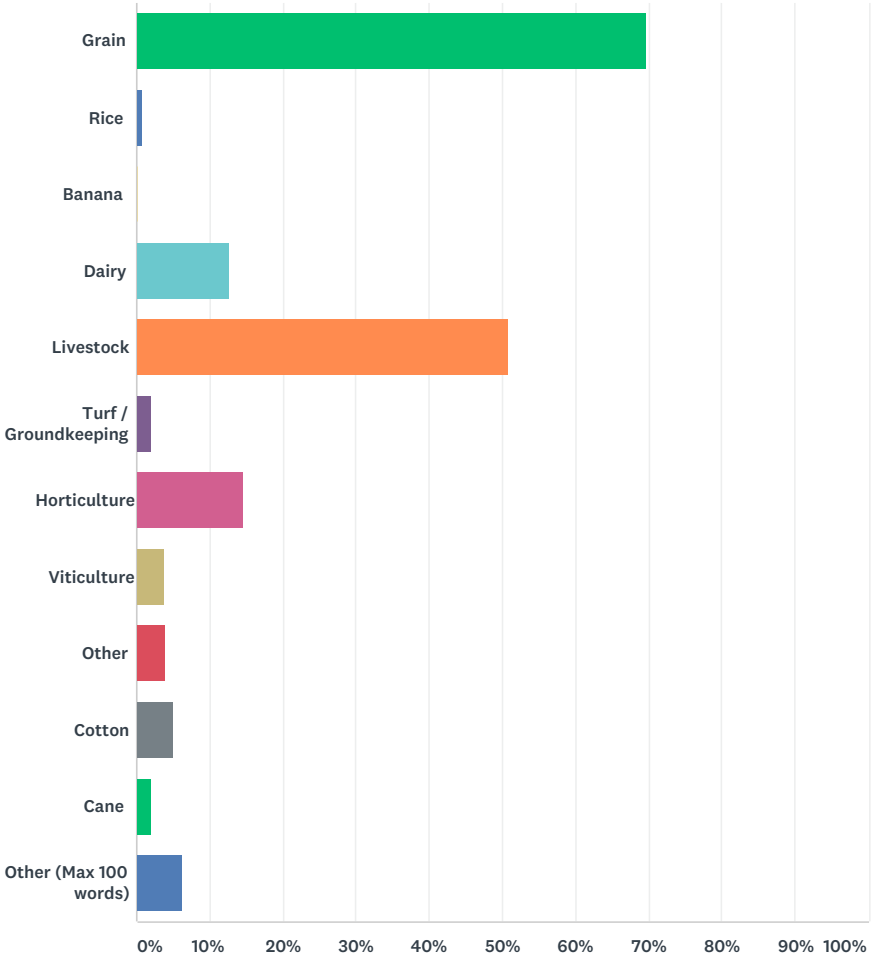
- Victorian Farmers Federation 17.09%
- Grains Producers Australia 9.18%
- NSW Farmers 24.37%
- GrainGrowers 27.53%

Where are you located?



ANSWER CHOICES	RESPONSES
New South Wales	29.38%
Queensland	11.56%
Victoria	29.06%
Northern Territory	0.31%
Tasmania	1.25%
South Australia	16.25%
Western Australia	11.88%
Australian Capital Territory	0.31%

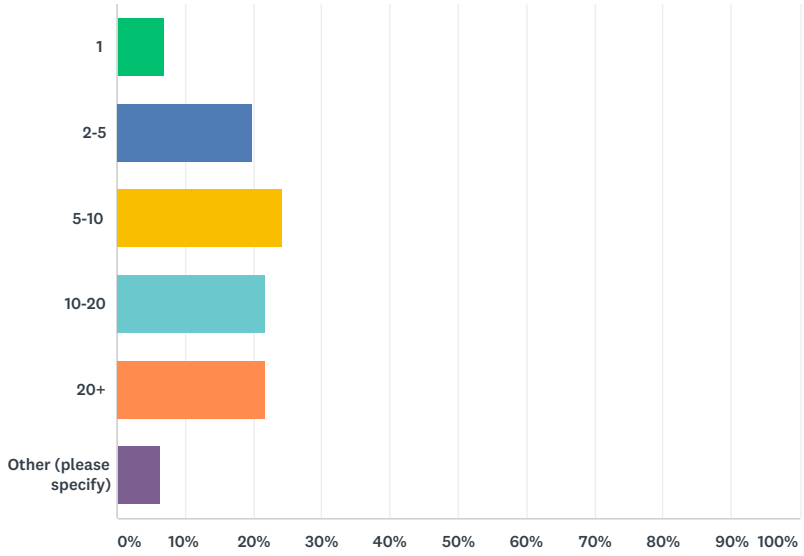
Please indicate which agricultural sector you operate:



ANSWER CHOICES	RESPONSES
Grain	69.57%
Rice	0.93%
Banana	0.31%
Dairy	12.73%
Livestock	50.93%
Turf / Groundkeeping	2.17%
Horticulture	14.60%
Viticulture	3.73%
Other	4.04%
Cotton	4.97%
Cane	2.17%
Other (Max 100 words)	6.21%

QUALITATIVE DATA

What volume/number of IBC's do you purchase per year?



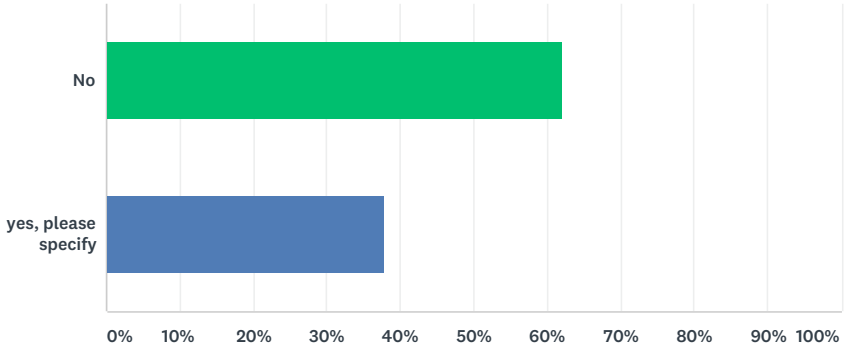
ANSWER CHOICES	RESPONSES
1	6.85%
2-5	19.94%
5-10	24.30%
10-20	21.81%
20+	21.81%
Other (please specify)	6.23%

Where do you source your IBC products?

85% of respondents sourced products in IBCs from local retailers

Are you aware of companies that have a current return program for IBCs?

62% of respondents were not aware of any returnable program

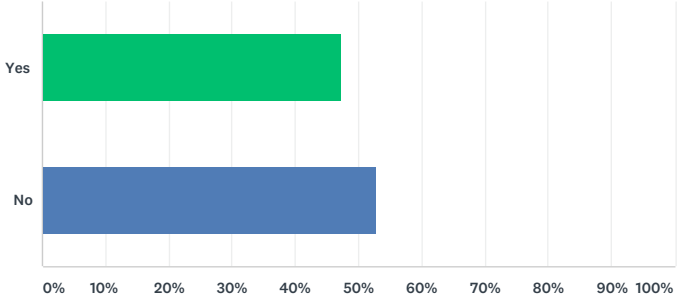


62%
are not aware of IBC return programs

ANSWER CHOICES	RESPONSES
No	62.19%
yes, please specify	37.81%

Do you return your IBCs?

Half of respondents return via proprietary programs, while the remainder are unaware they can be returned, or they dispose via re-purpose/on-sell.

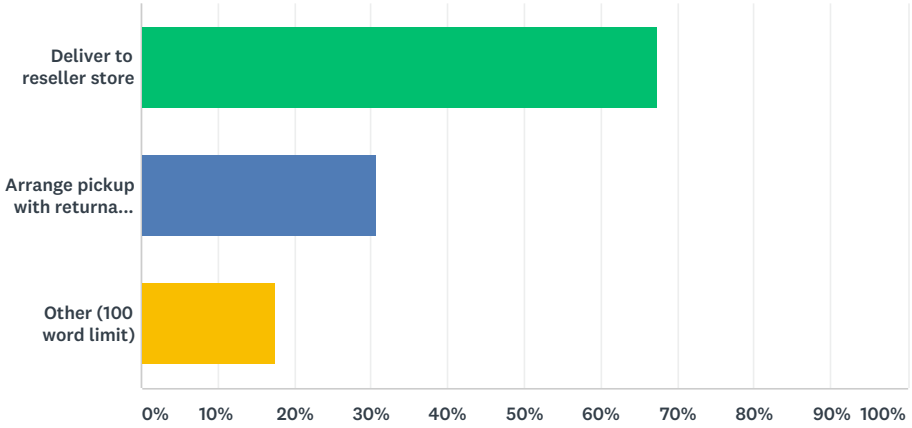


ANSWER CHOICES	RESPONSES
Yes	47.34%
No	52.66%

STATISTICAL QUESTIONS

How do you return your IBCs?

For those that do return, 67% returns are via returns to the distribution location, for those that don't return, the majority 66% repurpose their IBCs.



ANSWER CHOICES	RESPONSES
Deliver to reseller store	67.32%
Arrange pickup with returnable program	30.72%
Other (100 word limit)	17.65%

Why don't you return your IBCs?

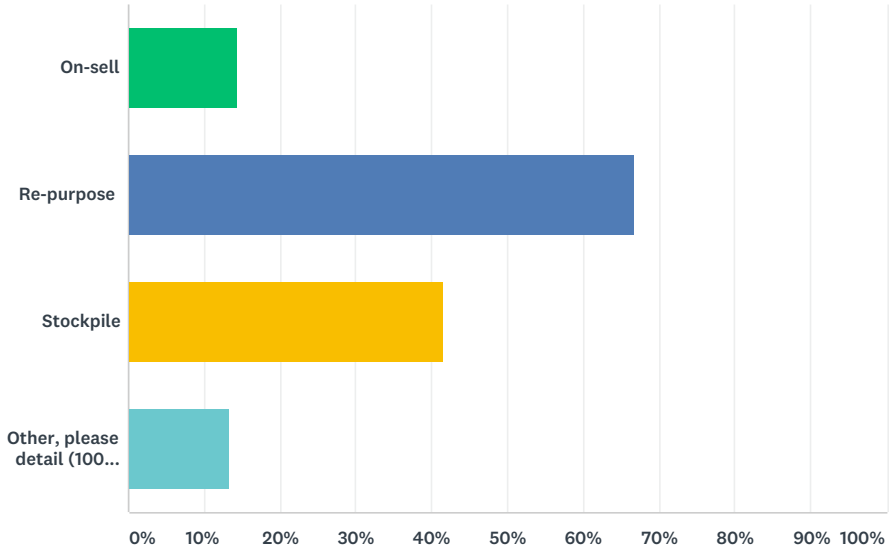
47% unaware of programs, 46% repurpose on farm or on-sell.

47% Unaware of return programs

46% Re-purpose or on-sell their IBCs

What do you do with your empty IBCs?

Respondents marked on-sell/repurpose/stockpile, which skews the results (% greater than 100% due to multiple answers for a single response)



ANSWER CHOICES	RESPONSES
On-sell	14.44%
Re-purpose	66.67%
Stockpile	41.67%
Other, please detail (100 word limit)	13.33%
Total Respondents: 180	

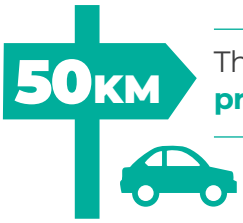
If you use return systems, how satisfied are you that the program is effective (on a scale of 1 to 10)?

For those that do return, they were generally satisfied, although only 36 respondents – not a conclusive result.

	UNSATISFACTORY	2	3	4	5	6	7	8	9	EXTREMELY SATISFIED	TOTAL
(no label)	2.78% 1	2.78% 1	2.78% 1	0.00% 0	11.11% 4	13.89% 5	11.11% 4	13.89% 5	13.89% 5	27.78% 10	36

What distance are you willing to travel to return IBCs?

Most are willing to travel up to 50km to dispose (round trip) – 65% of respondents



The **distance most respondents are prepared to travel** to return their empty IBCs

Are you prepared to pay for a fee for collection service and disposal?

Majority indicated in the negative – 82%

NO 82%

82% of respondents **were not prepared to pay a fee** for a collection service for IBCs

Do you have issues in disposing of other sized containers or other Ag plastics?

Enviros = 12 respondents
Grain/Silage = 20 respondents

SUMMARY

Those primary producers that are aware of the returnable programs, utilise these return services. However, there is a challenge for distance, particularly for those more remote holdings. Retailers play a significant role in current returns and farmers liked the deposit scheme (now redundant) as this incentivised them to return. The practice of re-purpose and on-selling is a concern as this is widespread and unregulated (safety concerns). There were some issues identified for other ag plastics (silage wrap, grain bags, irrigation pipe) however the responses were not conclusive. The focus of the survey was on IBCs, and so may have missed engaging fully with these stakeholders regarding other Ag plastics. 82% of the respondents are not willing to pay anything additional for a collection service and so the costs would have to be part of the initial cost of purchasing the products.

LEARNINGS

- Retailers to be made further aware of returnable programs
- Rural Business piece in February 2020 edition
- State and national farming organisations encouraged to promote programs to their direct membership
- Distance – open a dialogue between farming organisations and Schutz/Astron
- Ensure farming organisations understand the risks to their members that repurpose/on-sell - particularly if the providence of the contents of the container is not known. Containers containing scheduled products may be on-sold and the providence not accurately represented, possible health/safety risks.
- Any future deposit scheme would need to be imposed by government regulations (not a preference)