



Queensland Dairyfarmers' Organisation Limited ABN: 90 090 629 066

QDO Industry Survey Results 2009

Introduction

The QDO undertook a survey of Queensland dairy farmers in late 2008 with survey responses being received up until February 2009.

The survey was undertaken to collect data and information which is critical for a range of important functions and services carried out by the QDO and other associate industry service providers.

The QDO is pleased to report that approximately 13% of dairy farmers in Queensland responded to the survey, given that the survey was long and very detailed.

The following survey summary provides a snap shot of the results for the majority of the questions. The data for some questions have not been reported as the results were not statistically valid or are meant only for internal purposes of the QDO.

Please note that the data is time sensitive and the survey responses were received in the period December 2008 and February 2009.

In addition we have provided a range of supplementary information relative to the current and future industry environment.

This survey has also been supported by

Subtropical Dairy Program

Dairy Water & Fodder for Profit Program

And

Wesfarmers Insurance.

Dairy & Fodder Water for Profit Programs



Key Results from the Data

A range of survey questions related to past, current and future production capacity and some of the key results presented that;

- Of 74 responses: 70% were partnerships, 16% sole traders, 7% companies and 8% trusts.
- Of 68 responses. 36 or 53% presented that they believed they still expect to be dairying in five years time, and 64% in three years time and 91% in 12 months time, however 6% presented that they would not be in five years time, 5% in three years time and 0% in 12 months time. 41% presented that they were unsure in five years time, 31% in three years time and 9% in 12 months time. This data reflects the continuing attrition of farmers from the northern dairy industry,
(2006 Survey: Of 150 responses. 72 or 48% presented that they believed they still expect to be dairying in three years times, however 11% presented that they would not be and 41% presented that they were unsure.)
- Of 75 respondents 30 or 40% presented that they are in an expansionary phase,
- Of 77 responses, 54 or 70% presented that they were confident or very confident in the future of the dairy industry and their dairy business,
- the average number of cows milked over the last year has risen by 2% over 2007,
(2006 Survey: average number of cows milked over the last year had fallen by 4% and change of 6% to the 2008 survey and the average production per cow has increased by 1.6% over 2006 survey results),
- Average milk production per farm in 2008 has grown by 8% which is in line with the current Dairy Australia data which currently shows an ongoing monthly growth trend over recent months,
(2006 Survey: 6.29% increase over 2006 Survey figures),
- Respondents indicated a continuation of milk production growth of 6.5% for 2009 given average climatic conditions or 11% if conditions improved further.
- 67% of respondents believed that milk price was a constraint to increasing production, with 62% citing seasonal conditions, 47% water availability, 37% availability of labour and 21% government regulation,
- 35 of 69 (51%) responses presented that they had received Exceptional Circumstances assistance,
- 60 of 72 (83%) responses presented that they had received fodder freight subsidies with 18 of 70 responses indicating that they had encountered difficulties in applying for assistance,
(2006 survey reports 47% of respondents had applied for Fodder/Freight subsidies)
- 23 of 68 (34%) respondents had accessed assistance from the Drought support team,
- 66% of respondents had been affected by drought in 2008 with 35% affected by flood/cyclone, 55% of respondents had applied for EC assistance with 50% receiving the assistance,
- 62 of 68 responses (91%) presented that they believed that farm debt would either stay the same or decrease during 2009, *(2006 survey report 66.4%)*

- 14 of 74 respondents (19%) (*2006 survey – 20.81%*) were intending to employ additional labour over the next year, 19 of 72 respondents (26%) indicated they were interested in employing foreign labour, 26 of 70 (37%) (*2006 survey – 28.9%*) indicated that they have experienced difficulties in sourcing or managing employees,
- 70 of 76 respondents (92%) believed there is a need for competition in the QLD fertiliser market with an overall ranking of 8.9 out of 10. 82% of respondents believed price was a key driver in their fertiliser purchases,
- 56% of responses indicated that they had a farm business plan in place and 44% presented that they did not have a farm business plan,
(*2006 Survey: 64% of responses presented that they had a farm business plan in place and 36% presented that they did not have a farm business plan.*)
- 45% of responses presented that they had a succession plan in place,
(*2006 Survey: 49% of responses presented that they had a succession plan in place, however 51% presented that they did not have a succession plan.*)
- When ceasing dairying of 75 responses, 57% presented they had someone to hand the farm onto, however 43% presented they did not,
- 71% of respondents used Herd Recording,
- 53% of respondents indicated they never obtain an analysis of Fodder supplies before purchase,
- Only 26% of respondents have contracted fodder or grain supplies,
- 46% of respondents have fodder storage for in excess of 6 months, with 24% planning to increase storage,
- Of 65 responses, 55% have a Feed/Nutrition plan in place,
- 75% of respondents normally relied on irrigation water with an average of 226 megalitres per year, 34% from a regulated supply, (*2006 survey average was 229 ML*)
- In 2008 available irrigation water rose 10% on average to 177 ML, (*an increase of 13.4% over 2006 survey results*)
- Average farm values were \$2,902,174 an increase of 26% over 2006 survey results
- In response to the biggest challenges facing their dairy business at **present**, of all respondents,
 - Milk price was ranked top priority by 19%, second priority 8% and third 12%
 - Input costs were ranked top priority by 13%, second, 27% and third 9%
 - Human resources and Government regulation also featured prominently
- In response to the biggest challenges facing their dairy business in the **future**, of all respondents,
 - Milk price was ranked top priority by 28%, second priority 18% and third 6%
 - Climate change was ranked as a number one issue by 11%, second 18% and third 10%
 - Input costs were ranked top priority by 8%, second 15% and third 21%
 - Carbon trading, Government Regulation & Human Resources also featured prominently

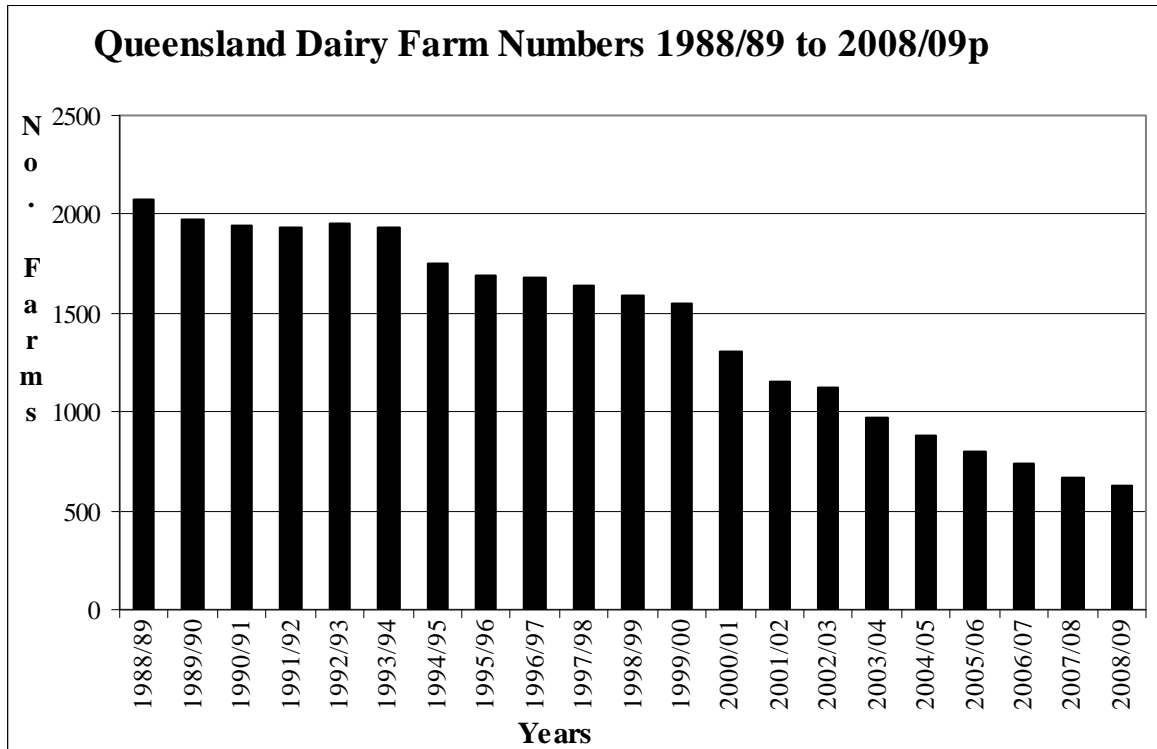
- In response to the Three most important/critical services provided by an industry body for your business, of all respondents,
 - Government Liaison was ranked top by 20% and second by 23%,
 - Provision of information was rated top by 10%, second by 19% and third by 12%
 - Other priority areas included Milk Pricing, Herd Health and Research & Development

If you would like further information on the QDO survey please contact the QDO on (07) 3236 2955.

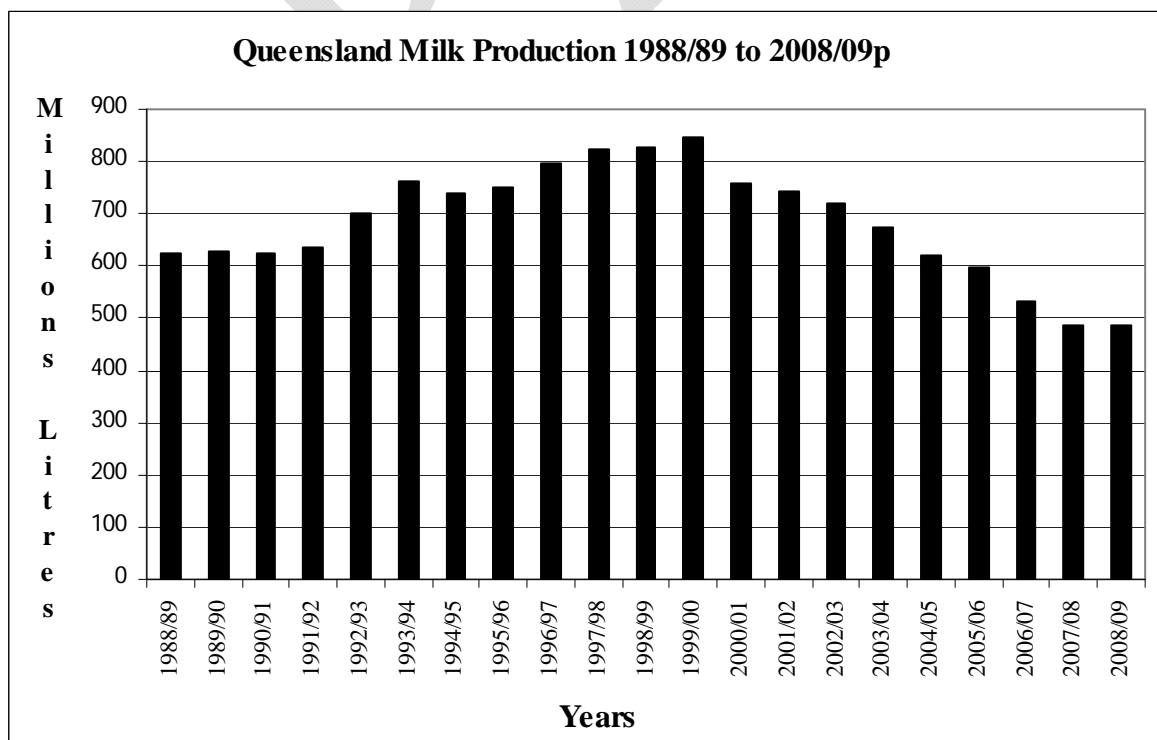
Please Note: the ownership of the survey information contained within this report belongs to the Queensland Dairyfarmers' Organisation Ltd and this report or any of the survey information contained within this report is not to be re-published and or copied in any form without prior approval of the Queensland Dairyfarmers' Organisation Ltd.

Supplementary Information

Farm Numbers and Milk Production for Queensland



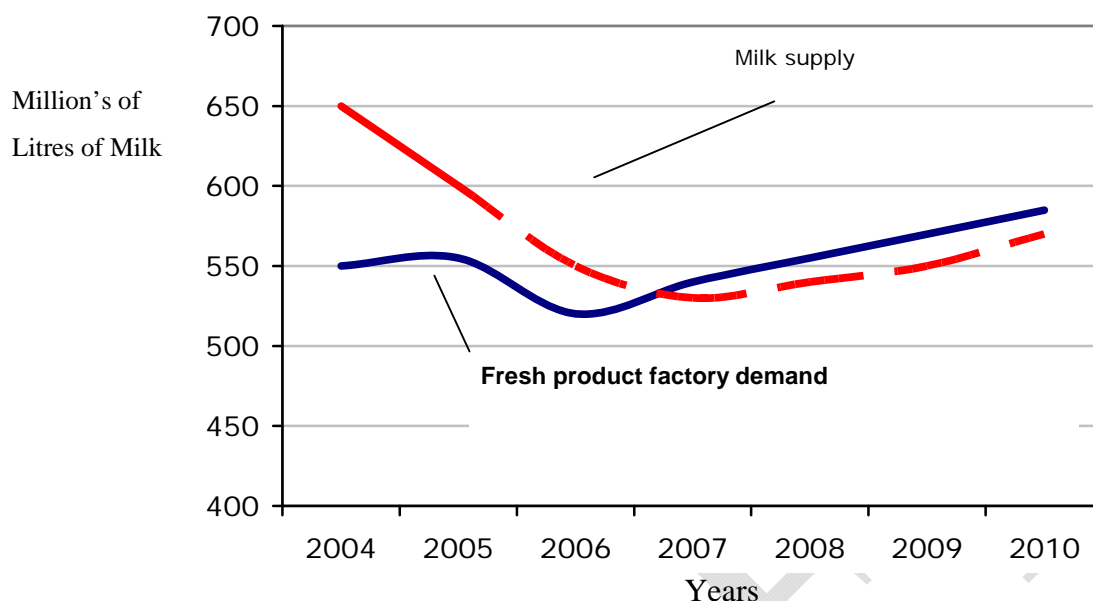
(2008/09 figures are forecast estimates)



(2008/09 figures are forecast estimates)

Regional Demand Versus Supply

The following graph is an extract from the Dairy 2006: Situation & Outlook report. This graph presents the historical and forecast production for the Southern Queensland and Northern NSW region versus historical and forecast regional fresh milk demand.



Production Forecast

The latest forecast report for production in Queensland as at February 2009 is presented below.

	2004-05 million litres (estimates)	2005-06 million litres (estimates)	2006-07 million litres (estimates)	2007-08 million litres (estimates)	2008-09 million litres (forecast)	% change
South-east Queensland	492	486	419.06	377	385	2
Far north Queensland	89	87.5	82	77	77	0
Central Queensland	38	36	33.34	31	31	0
Total Queensland	619	609.5	534.4	485	493	1.65

The January 2009 milk production figures came in at 8.6 % higher compared to January 2008. The production volume for the year to date as at the end of January 2009 compared to the same period in 2008 was 3.6% higher or 10.9 million litres.

Improved seasonal conditions, across a number of Queensland dairying areas have helped this boost in production. These conditions have also allowed many producers to restore their feed reserves.

However across all dairying regions in Queensland there exist significant contrasts in climate conditions ranging from flooding rains in Northern and Central Queensland through to parts of the north western zones of the South East Corner, Northern Darling Downs and the wider Burnett region still suffering from drought conditions. As such many dairy farmers still face significant climate challenges and there are still other climate risks which may affect other areas as well such a heat waves, all which impact on production and farm costs.

High inputs prices including fertiliser and fuel continue to push up the farm operational costs and constrain dairying operations.

Over the last year processors have offered additional price, contract and supply incentives. This has equated to increases in farm gate prices ranging from approximately 30 to 35 percent, to an per annum average per litre price range of around 48 to 60 cents per litre, with the majority of producers in the price band of approximately 52 to 60 cents per litre. The majority of farmers have taken this opportunity to enter into longer term supply contracts with processors.

With the international financial crisis biting, dairy product demand and prices internationally have declined over recent months. While the lower Australian dollar will assist to offset some of this impact, the prices paid to dairy farmers in southern Australia has already been impacted and for some dairy farmers who entered into short term contracts with processors. It is hoped that the stall in trade and lower prices will be only short term and that trade will start to occur again with some restoration of international prices.

With many producers in Queensland signed up to longer term contracts the gross value of milk production for Queensland is still expected to be around \$270 million for the 2008/2009 year.

For the next six months of 2008/09 it is forecast that milk production will increase by some 1.6% or 8 million litres to 493 million litres. Production may strengthen further depending of seasonal conditions and the recovery from a heavy wet season and the breaking of drought in other areas and the avoidance of other climatic shocks such as heat waves.

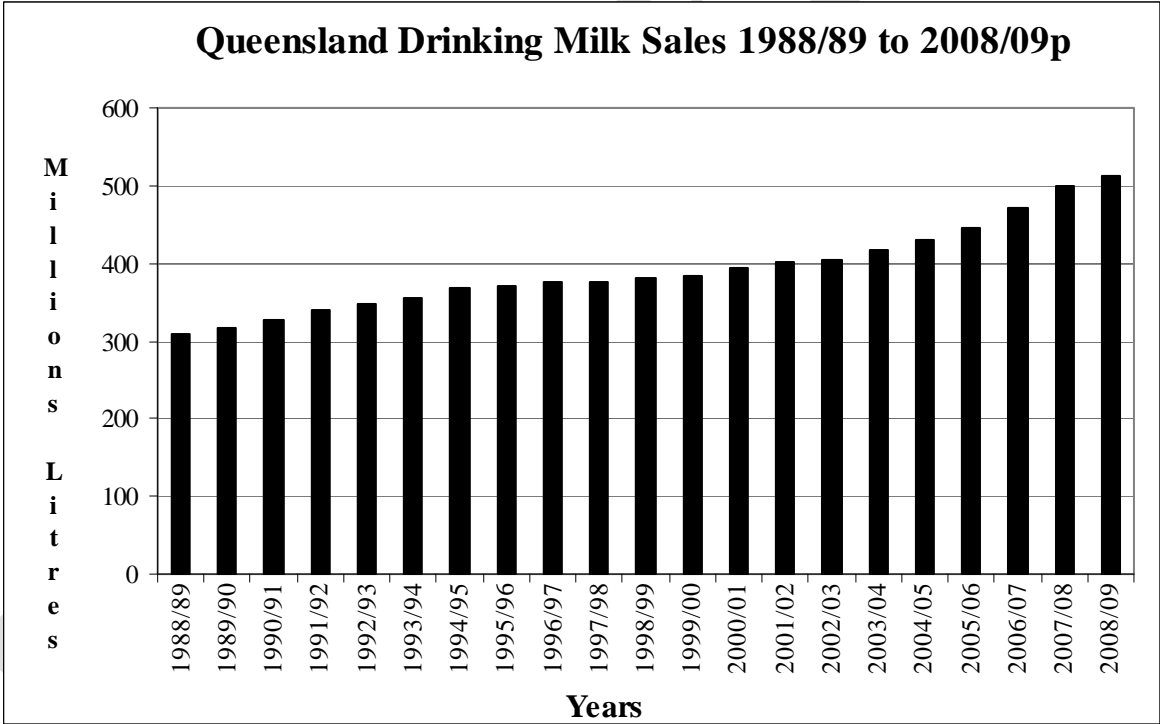
Regional Demand Forecasts

Consumption Data

Per capita consumption of dairy products and overall demand for dairy products in Queensland has continued to grow. The growth in milk sales for Queensland, continue to lead the eastern sea board, with the Year to Date January 2009 figures running at 2.8% compared to a national average of 2.3%. The continuing milk sales growth continues to provide the industry with the opportunity for further production growth in order to meet market demands.

The following graph presents the annual figures for drinking milk sales over the last two decades.

Over the last two years the growth rate in drinking milk sales or demand has exceeded milk production or supply and thus milk has been required to be supplied from southern milk production pools to fill local supply gaps.



(2008/09 figures are forecast estimates)

Population Growth and Growth of the Domestic Market

The population of South East Queensland (Brisbane and Moreton Statistical Divisions) is projected to increase by 1.2 million people to 3.6 million people by 2026, up from 2.4 million people recorded in 2001. With this forecast growth in population by 50 percent over the next two decades there is expected to be an equal to greater increase in the regional domestic market demand for dairy products.

It is estimated that for every one million people in the domestic market there is a demand of more than 100 million litres per annum of drinking milk. In addition to this there is also a demand for manufactured products which we have factored on the same ratio above. As such with the forecast population growth over the next two decades it is estimated that there will be an increase in demand for milk and dairy products in excess of 200 million litres of milk.

Survey Results Summary by Question 2009

Survey Responses received	76
Total QLD Dairyfarmers	610
% Responses of total	12.46%

Question

1 Position in Business

Responses	76	
Owner	42	55.26%
Partner	32	42.11%
Sharefarmer	0	0.00%
Employee	2	2.63%
Other	0	0.00%

2 Age

Responses	76	
18-25	0	0.00%
26-35	6	7.89%
36-45	10	13.15%
46-55	27	35.52%
56-65	21	27.63%
65+	12	15.79%

3 Gender

Responses	70	
Male	62	88.57%
Female	8	11.43%

4 Business Structure

Responses	76	
Sole trader	12	15.79%
Partnership	53	69.74%
Company	5	6.58%
Trust	6	7.89%

5 Company Supplied

Responses	74		2006 Survey	2006 Survey
Norco	7	9.46%	7	5.23%
Parmalat	38	51.35%	81	52.94%
Dairyfarmers	9	12.16%	58	37.91%
National Foods	17	22.97%	17	3.92%
A2	1	1.35%		
Unidentified	2	2.70%		

6a Expect to be Dairying in 12 Months

Responses	55	
Yes	50	90.91%
No	0	0.00%
Unsure	5	9.09%

6b Expect to be Dairying in 3 Years

Responses	58	
Yes	37	63.79%
No	3	5.17%

Unsure	18	31.03%
6c Expect to be Dairying in 5 Years		
Responses	68	
Yes	36	52.94%
No	4	5.88%
Unsure	28	41.18%

Common comments for leaving or being unsure included: retiring, price & returns and climate

7 Stage in Business Cycle		
Responses	75	
Expanding > 10%	4	5.33%
Expanding < 10%	26	34.66%
Stable	40	53.33%
Downsizing	2	2.66%
Plan to Exit	3	4%

8 Business Plan in Place		
Responses	73	
Yes	41	56.16%
No	32	43.84%

9a When ceasing Dairying is there someone to Hand Business on to		
Responses	75	
Yes	43	57.33%
No	32	42.67%

9b If Yes is there a succession plan in place		
Responses	53	
Yes	24	45.28%
No	29	54.72%

9c Require Succession Planning assistance		
Responses	54	
Yes	11	20.37%
No	43	79.63%

10 Confidence in Future of Dairy Industry		
Responses	77	
Very Confident	9	11.69%
Confident	45	58.44%
Unsure	16	20.78%
Not Confident	7	9.09%

11 Confidence in Future of your Dairy Business		
Responses	77	
Very Confident	10	12.99%
Confident	44	57.14%
Unsure	16	20.78%
Not Confident	7	9.09%

12 Believe the Nth Dairy Industry Situation & Outlook Report is important for Industry		
Responses	73	
Strongly Agree	11	15.07%
Agree	33	45.21%

	Unsure	28	38.36%		
	Disagree	1	1.37%		
13	Believe the Nth Dairy Industry Strategic Plan is important for Industry				
	Responses	72			
	Strongly Agree	11	15.28%		
	Agree	32	44.44%		
	Unsure	27	37.50%		
	Disagree	2	2.78%		
14	Amount of Land Used	Main Farm	Other	2006 Survey	
	Responses	76	34	156	
	Average	283	126	245	
	Median	190	90	200	
	Max	2200	600	867	
	Min	29	15	30	
15	In Last 5 years land use has				
	Responses	75			
	Increased	22	29.33%		
	Same	49	65.33%		
	Decreased	4	5.33%		
16	Last Year % of total Income from Dairy			2006 Survey	
	Responses	76		156	
	Average	88.78%		91.00%	
	Median	98.00%		100.00%	
	Max	100.00%		100.00%	
	Min	10.00%		4.00%	
17	Last Years (2007)	Cows Milked	Milk Production	2006 Survey	2006 Survey
	Responses	75	68	148	148
	Average	143	941198	154	948274
	Median	120	650000	130	743924
	Max	700	6850000	700	6750000
	Min	40	129000	24	45000
18	Current Year (2008)	Cows Milked	Milk Production	2006 Survey	2006 Survey
	Responses	75	70	156	156
	Average	146	1016375	148	956219
	Median	120	658000	122.5	800000
	Max	750	8000000	700	7000000
	Min	40	120000	24	100000
19	Current Years (2008) Estimation	Production per Cow		2006 Survey	
	Responses	71		156	
	Average	6120		6023	
	Median	6000		5913	
	Max	10000		10400	
	Min	3200		1818	
		% Protein			
	Responses	70		139	
	Average	3.23		3.24	

Median	3.20	3.2
Max	3.90	4.5
Min	2.85	2.79

	% Butterfat	<i>2006 Survey</i>
Responses	70	95
Average	3.98	3.97
Median	3.92	4.00
Max	5.00	4.83
Min	3.38	3.30

20	Planned Production for 2009 - Improving Conditions	Cows Milked	Milk Production	<i>2006 Survey</i>	
				<i>2006 Survey</i>	<i>2006 Survey</i>
	Responses	73	66	147	144
	Average	157	1127875	164	1071376
	Median	120	795000	140	880000
	Max	800	8200000	800	8250000
	Min	20	140000	45	100000

	Planned Production for 2009 - Average Conditions	Cows Milked	Milk Production	<i>2006 Survey</i>	
				<i>2006 Survey</i>	<i>2006 Survey</i>
	Responses	75	67	135	132
	Average	155	1082234	148	922618
	Median	120	700000	125	750000
	Max	800	8200000	700	7000000
	Min	40	120000	28	80000

21 Constraints to Increasing production

Milk price	51 Responses
Seasonal Conditions	47 Responses
Land	20 Responses
Labour	28 Responses
Water	36 Responses
Finance	9 Responses
Government Regulation	16 Responses
Other	5 Responses

22	Heifers on Hand	< 1 Year old	> 1 Year old	<i>2006 Survey</i>	
				<i>< 1 Year Old</i>	<i>> 1 Year Old</i>
	Responses	74	73	151	149
	Average	50	56	44	44
	Median	38.5	39	34	31
	Max	400	500	250	350
	Min	4	5	0	0

23	Heifers Entering herd	Actual 2008	<i>2006 Survey</i>
		Responses	71
	Average	39	36
	Median	30	28
	Max	380	240
	Min	9	2

24	Heifers Entering herd	Planned 2009	<i>2006 Survey</i>
		Responses	73
	Average	45	38
	Median	30	30

Max	450	185
Min	5	3

25	Cows and Heifers Sold	2008 - Cows	2008 - Heifers	2006 - Cows	2006 - Heifers
	Responses	67	17	111	12
	Average	28	13	36	15
	Median	22	8	30	5.5
	Max	150	70	250	90
	Min	3	0	0	1

	2009 - Cows planned	2009 - Heifers planned
Responses	60	9
Average	29	12
Median	21	5
Max	160	30
Min	5	0

26	Cows and Heifers Purchased	2008 - Cows	2008 - Heifers	2006 - Cows	2006 - Heifers
	Responses	19	19	19	15
	Average	24	15	28	23
	Median	15	12	15	20
	Max	120	50	100	80
	Min	2	2	0	2

	2009 - Cows planned	2009 - Heifers planned
Responses	5	6
Average	9	7
Median	8	7.5
Max	10	10
Min	7	1

27	Calving Pattern			2006 Survey	
	Responses	75		150	
	Year Round	66	88.00%	130	86.67%
	Batch	6	8.00%	14	9.33%
	Seasonal	3	4.00%	6	4.62%

28	Herd Recording		
	Responses	75	
	Yes	53	70.66%
	No	22	29.34%
	Frequency		
	Annual	1	2.12%
	Quarterly	5	10.63%
	Monthly	35	74.47%
	Every Two months	6	12.77%

29	If Herd recording could deliver a good ROI & time would you undertake it		
	Responses	36	
	Yes	29	80.56%
	No	7	19.44%

30 Type of Feed System

Pasture Based	77.59%
PMR	15.77%
TMR	1.92%
Other	4.72%

31 % age of Fodder Sourced

On Farm	86.38%
Off Farm	13.62%

32 Do you obtain analysis of Fodder Supplies before Purchase?

Responses	64
Always	4.69%
Often	12.50%
Sometimes	29.69%
Never	53.13%

33 Have you Contracted Grain or fodder supplies

Responses	73		% of Annual Needs
Yes	19	26.03%	45.00%
No	54	73.97%	

34 Amount of Fodder Storage held on Farm

Responses	55	
3 months	17	30.91%
6 months	13	23.64%
9 months	8	14.55%
12 months	10	18.18%
more	7	12.73%

35 Plan to increase fodder storage

Responses	72	
Yes	24	33.33%
No	48	66.67%

36 Feed/Nutrition Plan

Responses	65	
Yes	36	55.38%
No	29	44.62%

37 Access Professional Advice

Responses	75	
Always	13	17.33%
A Few Times	39	52.00%
Never	23	30.67%

38 Would like to access professional advice

Responses	33
-----------	----

	Yes	10	30.30%		
	No	23	69.70%		
39	Feed in enclosed Yard				
	Responses	76			
	Yes	5	6.58%		
	No	71	93.42%		
40a	Feedpad				
	Responses	71			
	Yes	26	36.62%		
	No	45	63.38%		
40b	Is it Concreted				
	Responses	36			
	Yes	12	33.33%		
	No	24	66.67%		
40c	Collect Manure for Reuse				
	Responses	55			
	Yes	33	60.00%		
	No	22	40.00%		
41	Farm normally irrigated			<i>2006 Survey</i>	<i>2006 Survey</i>
	Responses	72		150	
	Yes	54	75.00%	107	71.33%
	No	18	25.00%	43	28.67%
		Megalitres		<i>2006 Survey</i>	
	Average	226		229	
	Median	200		180	
	Max	700		1300	
	Min	25		1.2	
42	Water Sources				
	Regulated Surface %	21.11%			
	Unregulated Surface %	39.03%			
	Regulated Underground %	12.96%			
	Unregulated Underground %	26.90%			
43	Meter Water Use				
	Responses	67			
	Yes	25	37.31%		
	No	42	62.69%		
44	Irrigation Water Available				
		2008	2007	<i>2006</i>	<i>2005</i>
	Average	177	161	156	194
	Median	137.5	120	120	138
	Max	700	700	700	700
	Min	25	10	0	0
45	External Advisory Services Used			<i>2006 Survey</i>	
	Business Planning	12	Responses		
	Financial Planning	14	Responses	12	
	QDAS	25	Responses	54	
	Nutrition	32	Responses	53	
	Soil Testing	43	Responses	39	
	Agronomy	15	Responses		
	Fodder Testing	10	Responses	10	

	Animal Health	32	Responses		
	Other	4	Responses	10	
46	Assistance required for Drought Assistance			<i>2006 Survey</i>	
	Responses	63		132	
	Yes	4	6.35%	37	28.03%
	No	59	93.65%	95	71.97%
47	Affected by Natural Disasters				
			Drought		
	Responses	68			
	Yes	45	66.18%		
	No	23	33.82%		
			Flood/Cyclone		
	Responses	51			
	Yes	18	35.29%		
	No	33	64.71%		
48	Have you Applied for EC Assistance			<i>2006 Survey</i>	
	Responses	68		141	
	Yes	38	55.88%	82	58.16%
	No	30	44.12%	59	44.12%
			Flood/Cyclone		
	Responses	48			
	Yes	11	22.92%		
	No	37	77.08%		
49	Have you Received EC Assistance				
			Drought		
	Responses	69			
	Yes	35	50.72%		
	No	34	49.28%		
			Flood/Cyclone		
	Responses	42			
	Yes	10	23.81%		
	No	32	76.19%		
50	Applied for DPI Fodder/Freight subsidies			<i>2006 Survey</i>	
	Responses	74		151	
	Yes	63	85.14%	72	47.68%
	No	11	14.86%	79	52.32%
51	Received Fodder/Freight subsidies				
	Responses				
	Yes	60	83.33%		
	No	12	16.67%		
52	Other forms of Drought Assistance Received				
	Responses	70			
	Yes	7	10.00%		
	No	63	90.00%		
53	Use FMD's				
	Responses	70			

	Yes	18	25.71%		
	No	52	74.29%		
54	Accessed Assistance from Drought Support Team				
	Responses	68			
	Yes	23	33.82%		
	No	45	66.18%		
55	Farm Debt in 2009 will				
	Responses	68		2006 Survey	131
	Increased	6	8.82%	44	33.59%
	Same	30	44.12%	87	66.41%
	Decreased	32	47.06%		
56	Estimate Farm Value WIWO				
	Responses	70		2006 Survey	133
	Average	\$ 2,902,174		\$ 2,289,344	
	Median	\$ 2,500,000		\$ 2,000,000	
	Max	\$ 10,000,000		\$ 10,000,000	
	Min	\$ 700,000		\$ 150,000	
57	Number of People working on Farm				
		2007 FTE	2008 FTE	2009 FTE	2006 Survey
	Responses	70	71	70	142
	Average	2.88	2.89	2.93	2.83
	Median	3.00	2.50	3.00	2.50
	Max	8.00	8.00	8.00	10.00
	Min	1.00	1.00	1.00	1.00
58	Planning to employ additional labour				
	Responses	74		2006 Survey	149
	Yes	14	18.92%	31	20.81%
	No	60	81.08%	118	79.19%
59	Experienced Difficulties in sourcing/managing employees				
	Responses	70		2006 Survey	128
	Yes	26	37.14%	37	28.91%
	No	44	62.86%	91	71.09%
60	Consider employing foreign labour through Scheme				
	Responses	72			
	Yes	19	26.39%		
	No	53	73.61%		
61	Training needs for Employees or Self				
	Responses	76		2006 Survey	135
	Yes	15	19.74%	35	25.93%
	No	44	57.89%	100	74.07%
	Unsure	17	22.37%		
62	Require Workplace Health & Safety Assistance				
	Responses	72			
	Yes	8	11.11%		
	No	50	69.44%		

Unsure 14 19.44%

63 On Farm Investments for 2009

Dairy Plant \$ Responses 10
 Average \$ 29,200
 Median \$ 15,000
 Max \$ 150,000
 Min \$ 5,000

Feed Systems \$ Responses 10
 Average \$ 23,700
 Median \$ 15,000
 Max \$ 75,000
 Min \$ 5,000

Irrigation Plant \$ Responses 16
 Average \$ 52,000
 Median \$ 47,500
 Max \$ 150,000
 Min \$ 2,000

Effluent Systems \$ Responses 19
 Average \$ 39,763
 Median \$ 15,000
 Max \$ 400,000
 Min \$ 2,000

Plant & Equipment \$ Responses 19
 Average \$ 84,210
 Median \$ 55,000
 Max \$ 500,000
 Min \$ 5,000

Repairs & Maintenance \$ Responses 31
 Average \$ 41,161
 Median \$ 20,000
 Max \$ 500,000
 Min \$ 1,000

Grain & Fodder Storage \$ Responses 8
 Average \$ 62,625
 Median \$ 15,000
 Max \$ 400,000
 Min \$ 2,000

Livestock \$ Responses 3
 Average \$ 28,333
 Median \$ 20,000
 Max \$ 50,000
 Min \$ 15,000.

Land \$ Responses 3
 Average \$ 1,176,666
 Median \$ 500,000
 Max \$ 3,000,000
 Min \$ 30,000

64	Need for Competition in QLD Fertiliser market				
	Responses	70			
	Ranking 1 to 10	8.96			
65	Would support a competitive new entrant by purchasing from them				
	Responses	70			
	Ranking 1 to 10	9.07			
66	Would support a new entrant being structured as a Co-operative				
	Responses	68			
	Ranking 1 to 10	6.72			
67	Influence on Fertiliser Purchases				
	Responses	69			
	Convenience	12	17.39%		
	Price	57	82.61%		
68	Receive QDO Weekly Update ?			2006 Survey	
	Responses	71		149	
	Yes	60	84.51%	116	77.85%
	No	11	15.49%	33	22.15%
69	How do you receive it?			2006 Survey	
	Responses	63		118	
	Email	21	33.33%	27	22.88%
	Fax	20	31.75%	46	38.98%
	Mail	22	34.92%	45	38.13%
70	Rate the QDO Weekly Update			2006 Survey	
	Responses	61		115	
	Very Good	29	47.54%	44	38.26%
	Good	22	36.07%	48	41.74%
	Satisfactory	9	14.75%	18	15.65%
	Needs Improvement	1	1.64%	5	4.35%
71	How often should the QDO Update be published ?				
	Responses	67			
	Weekly	41	61.19%		
	Fortnightly	16	23.88%		
	Monthly	10	14.93%		
72	Do you think the Buying Service is Valuable				
	Responses	57			
	Yes	44	77.19%		
	No	13	22.81%		
73	Do you think the QDO/Commerce QLD Employer advice service is valuable ?				
	Responses	41			
	Yes	33	80.49%		
	No	8	19.51%		
74	Rate overall performance of the QDO in 2008				

Responses	65	
Very Good	26	40.00%
Good	23	35.38%
Satisfactory	14	21.54%
Needs Improvement	2	3.08%

75 Are you aware of the Subtropical Dairy Program?

Responses	75	
Yes	68	90.67%
No	7	9.33%

76 How do you rate the performance of the Subtropical Dairy program over the past year?

Responses	66	
Very Good	6	9.09%
Good	28	42.42%
Satisfactory	25	37.88%
Needs Improvement	7	10.61%

77 Importance of issues currently or in future (H/M/L)

	High	Medium	Low
Milk Price - Current	72	2	1
Milk Price - Future	71	2	0
Sustainable Profit Margins - Current	66	9	0
Sustainable Profit Margins - Future	64	8	1
Debt Levels - Current	27	25	22
Debt levels - Future	26	27	19
Business management - Current	38	23	7
Business management - Future	36	22	6
Pasture & Feed Supply - Current	52	15	3
Pasture & Feed Supply - Future	53	14	2
Nutrition & Feed Budgeting - Current	30	32	6
Nutrition & Feed Budgeting - Future	33	28	6
Irrigation & Stock Water - Current	44	21	5
Irrigation & Stock Water - Future	48	16	5
Cost of Grain & Fodder - Current	52	16	5
Cost of Grain & Fodder - Future	53	16	4
Input Costs - Current	54	14	2
Input Costs - Future	55	12	3
Expansion costs - Current	22	23	22
Expansion Costs - Future	22	25	20
Managing for Drought - Current	38	23	9
Managing for Drought - Future	41	19	10
Climate Change - Current	21	33	20
Climate Change - Future	25	29	19
NR & Environment Management - Current	26	31	15
NR & Environment Management - Future	30	31	10
Herd Health - Current	51	16	7
Herd Health - Future	50	16	7
Animal Welfare - Current	41	21	10
Animal Welfare - Future	44	20	8
Managing Ticks - Current	31	20	23
Managing Ticks - Future	35	18	21
Labour Availability Management - Current	28	22	22
Labour Availability Management - Future	28	24	18

Succession Planning - Current	16	17	38
Succession Planning - Future	18	22	31
Govt Regulation - Current	40	20	12
Govt Regulation - Future	44	19	8
Urban Encroachment - Current	16	17	35
Urban Encroachment - Future	23	12	33

78 Are you or a member of your enterprise involved in an Industry Network

QDO Branch/District Council	33
Subtropical Dairy Regional Group	13
Local Discussion Group	19
Nutrition in Action	5
Young Dairy Farmer Network	14
Dairying Better n Better	29
Other	4

79 Rate Services provided by QDO/SDP/DA in 2008 (H/M/L)

	High	Medium	Low
QDO Weekly Update	33	25	7
Northern Dairyfarmer Magazine	24	36	6
ADF Magazine	22	36	8
Dairyinfo.Biz Website	4	22	36
Annual Industry Conference	11	20	32
QDO Regional Forum	12	24	26
SDP Regional Group Meetings	7	29	27
Drought assistance from QDO Staff or co-ordinators	20	19	26
Assistance from mobile Drought Officer	14	15	35
Drought Info packs	22	18	26
Drought Workshops	14	18	34
QDO Drought Declaration submissions	31	19	17
RWUE Program	41	14	11
Dairying Better n Better program	25	27	11
Farmer incentive Programs	37	16	12
Workshops on Local NRM priorities	24	22	15
In Calf	20	27	16
CowTime	15	33	17
Count Down Down Under	18	30	15
Feed Fibre Future	9	34	19
Nutrition Plu\$	16	34	12
Forage Plu\$	17	30	14
Future Dairy	14	23	25
Grains 2 Milk	15	32	17
People in Dairy	11	26	22

80 Importance of DairySat in Improving sustainability of your Farm (H/M/L)

	High	Medium	Low
Soil & Nutrient Management	43	12	7
Effluent Management Systems	25	26	11
Water Use Efficiency	34	19	8

	Farm Waste Management	29	22	11	
	Pest & Weed Management	29	22	11	
	Chemical use	20	29	14	
	Native Vegetation & Waterways	14	30	18	
	Reducing Greenhouse Gas & Energy consumption	17	29	17	
81	Importance to sustainability of your farm and Natural Resources (H/M/L)	High	Medium	Low	
	Locally Relevant Research	35	24	2	
	Extension & Training	19	35	11	
	Farmer discussion groups	31	22	13	
	Information & Resources	26	31	9	
	Programs (eg DBnB)	27	25	11	
	Incentives for Farm improvements	44	17	6	
82	Organisations used for services & info (W/M/A/N)	Weekly	Monthly	Annually	Never
	Processor Field Services	1	26	22	8
	QDO	15	19	21	5
	SDP	0	16	16	22
	Dairy Aust	0	11	23	21
	DPI	0	18	27	9
	Consultant	3	15	9	20
	Vet	8	42	12	4
	Product Supplier	10	26	17	5
	Other Farmers	13	28	7	4
83	Do you receive the Northern Dairy Farmer Magazine?				
	Responses	70		147	
	Yes	61	87.14%	131	89.12%
	No	9	12.86%	16	10.88%
84	Rate the Northern Dairyfarmer Magazine				
	Responses	64		127	
	Very Good	9	14.06%	32	25.20%
	Good	38	59.38%	66	51.97%
	Satisfactory	16	25.00%	26	20.47%
	Needs Improvement	1	1.56%	3	2.36%
85	Source of Information Sources				
	NDF	40			
	QDO Update	54			
	Processor Newsletter	38			
	QCL	37			
	Other Rural Papers	3			
	Ind Ext Material	26			
	Workshops	40			
	Private Advisors	16			
	Email Newslatters	0			
	Websites	1			
	Radio	10			
	TV	6			
	Other	4			
86a	Biggest challenges facing your dairy business currently (top responses)				
	Total responses	63			
	Milk Price	12	19.05%		

Input Costs	8	12.70%
Human Resources	7	11.11%
Drought	6	9.52%
Weather	6	9.52%
Herd Health	3	4.76%
Urban Encroachment	3	4.76%
Water	3	4.76%

86b	Second Priority	
Total Responses	48	
Input Costs	14	29.17%
Government Regulation	5	10.42%
Milk Price	4	8.33%
Environment	3	6.25%
Succession	3	6.25%
Weather	3	6.25%

86c	Third Priority	
Total Responses	33	
Human Resources	4	12.12%
Milk Price	4	12.12%
Government Regulation	3	9.09%
Input Costs	3	9.09%
Herd Health	2	6.06%
Succession	2	6.06%
Water	2	6.06%
Weather	2	6.06%

87a	Biggest future challenges to face your business (top responses)	
	First Priority	
Total Responses	47	
Climate Change	13	27.66%
Carbon Trading	5	10.64%
Climate Change	5	10.64%
Drought	4	8.51%
Human Resources	4	8.51%
Input Costs	4	8.51%

87b	Second Priority	
Total Responses	39	
Climate Change	7	17.95%
Climate Change	7	17.95%
Input Costs	6	15.38%
Government Regulation	4	10.26%
Human Resources	4	10.26%
Succession	2	5.13%
Urban Encroachment	2	5.13%

87c	Third Priority	
Total Responses	33	

Input Costs	7	21.21%
Government Regulation	5	15.15%
Carbon Trading	3	9.09%
Herd Health	2	6.06%
Milk Price	2	6.06%
Water	2	6.06%

88a Three most important/critical services provided by an industry body for your business?

	First Priority	
Total Responses	40	
Government Liaison	8	20.00%
Information	4	10.00%
Milk Prices	4	10.00%
Advocacy	2	5.00%
Farm Services	2	5.00%
Nutrition	2	5.00%
Research & Development	2	5.00%
Industry knowledge base/behind the scenes activity	2	5.00%
Government Grants	2	5.00%

88b Second Priority

Total Responses	31	
Government Liaison	7	22.58%
Information	6	19.35%
Herd Health	4	12.90%
Member Services	2	6.45%
Research & Development	2	6.45%