

COMPOST MARKET STUDY

Who Uses What, When , Where and Why



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BACKGROUND



boulder county zerowaste action plan

FINAL DRAFT



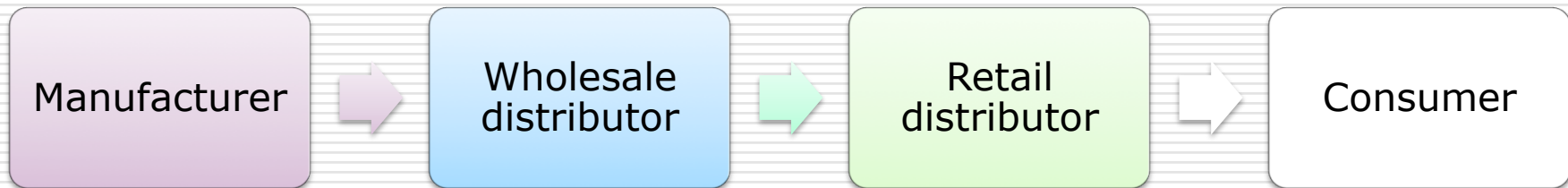
RESEARCH PLAN

- ID and characterize markets
- Survey end users
- ID materials sold

Sector	Contacts	Interviews
Local government	22	7
State government	4	2
School district(s)	8	4
Greenhouses	10	8
Nurseries / Tree farms	8	5
Landscapers	24	13
Contractors	9	6
Landscape architect	8	3
Large retail	10	5
Wholesale	10	5
Universities	8	4
Agriculture	12	7
Golf courses	8	3
Sports complexes	4	3
Engineering firms	6	5
Hospitals	6	4
Large Industrial Campuses	4	2
Federal facilities	3	2
Cemeteries	2	2
Associations / Trade Groups	6	4
HOA's	7	3
Processors	8	5
<i>Total</i>	187	102

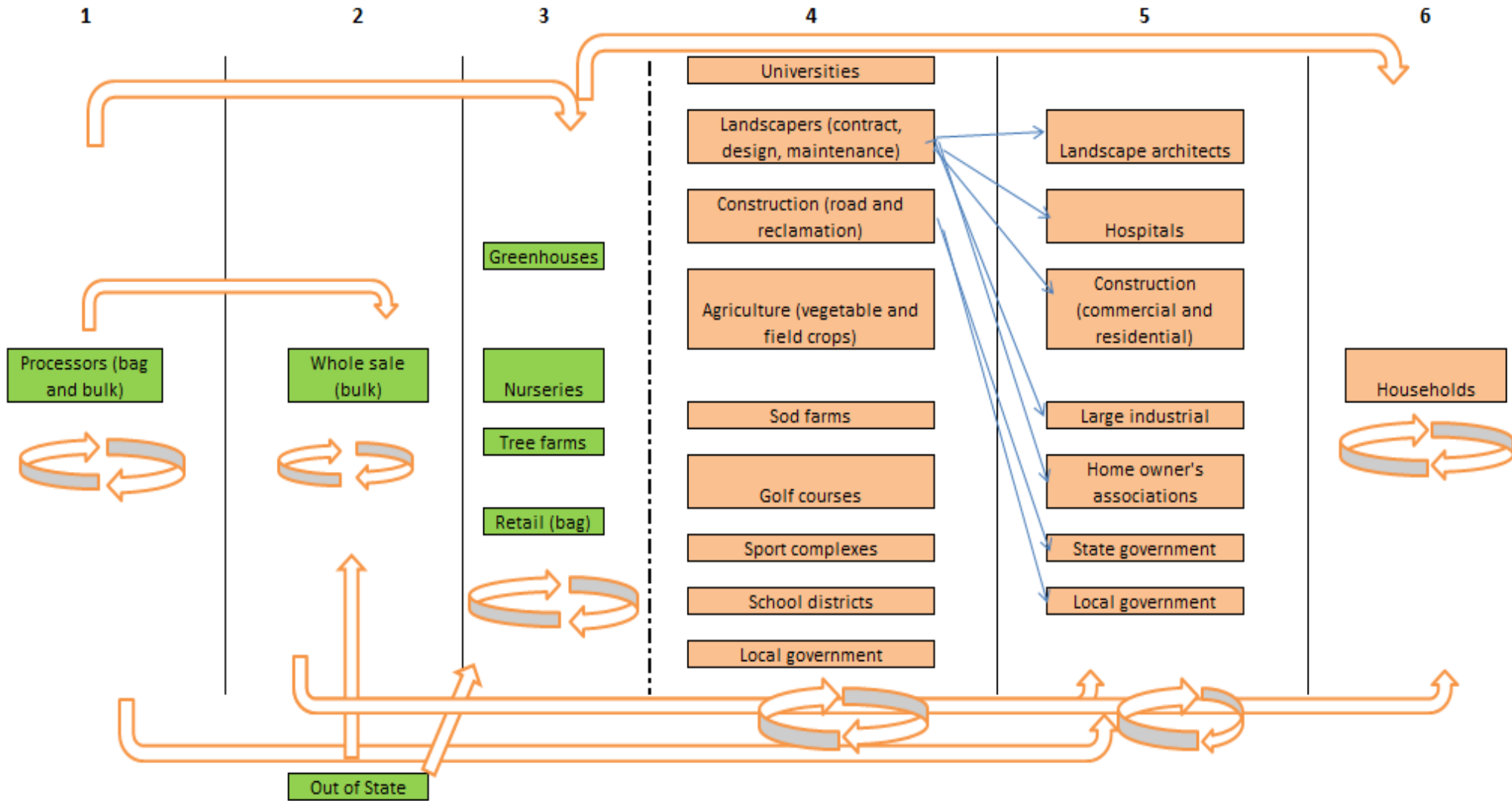
Market Overview

Market Example:



Compost is not linear

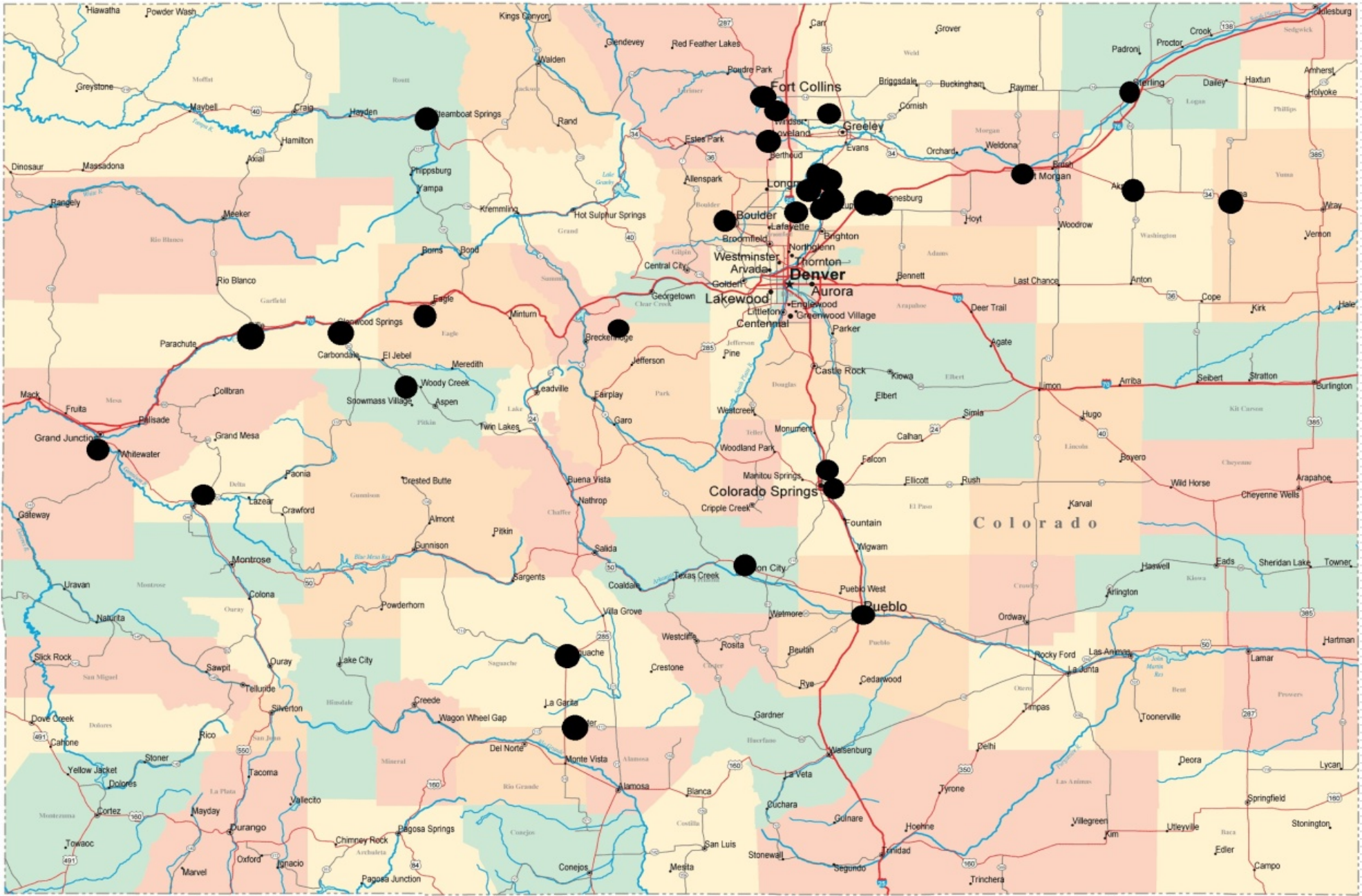
Market Overview





MARKET DETAILS

REGISTERED / PERMITTED SITES



Sector	Estimated use (%)
Tree Farms and Nurseries	Minimal
Large Retail and Garden Centers	Minimal
State Government	2.9%
County Government	3.3%
Local Governments	10.4%
Landscape (contractor, design, maintenance)	60.0%
Agricultural (vegetable and field)	13.0%
Construction (road and reclamation)	1.6%
Sod Farms	0.0%
Golf Courses	0.1%
Universities	0.2%
School Districts and Private Schools	0.2%
Sports Complexes	0.1%
Landscape Architects	n/a
Households (<i>retail sales</i>)	8.0%
<i>Total</i>	<i>58000 - 82,200</i>

NURSERIES / GARDEN CENTER

Sector	Notes	Barriers
Tree farms and nurseries	Very little use on-site for growing, one of the largest sellers of bags, some bags are coming from out of state	Do not require for growing, use alternatives or starters
Large Garden and Retail	Other large seller of bagged compost (no use), only sell bags, no bulk, products coming from all over (CO, UT, SD, TX, OR, and elsewhere)	Purchase decisions aren't always local, labeling, knowledge



GOVERNMENT

Sector	Notes	Barriers
State	Major use in transportation as soil amendment, state has a compost def. and spec (Class I STA Cert.) No reqmnt to use	Cost, availability (some areas), individual engineers
County	Most is road construction (80%) other is parks, open space, etc. products vary depending on application	Inconsistent product, knowledge (staff), labor / time
Local	Widely varied amounts, parks, turf, open space, etc. Specs and knowledge vary	Plastic pieces, biosolids(?), no codes, quality, impacts, application, cost



OTHER BIG USERS

Sector	Notes	Barriers
Landscapers	Largest user, used for new turf or renovation, limited maint. Use increasing, some resisting, codes can drive, specs vary (lg. v small)	Economy / construction, costs are up-front, quality, alternatives
Agriculture	Used in veg. not field, quality important but knowledge variable, some source from distant markets, cost and quality drive	Filed crops, costs and application, not a replacement cost, easy to see test results
Construction (road and reclamation)	Often in specs or bid documents, meet what bid says, (didn't look at oil and gas)	Application, cost (tight budgets), awareness, geography



SMALL OR SECONDARY

- Sod farms
- Golf courses
- Universities / institutions
- School districts and private schools
- Sports complexes
- Landscape architects
- Cemeteries
- Large industrial campuses
- HOAs
- Federal facilities
- Civil / Structural Engineers



MARKET POTENTIAL

MARKET POTENTIAL

Sector	Potential Use (%)
Tree Farms and Nurseries	Minimal
Large Retail and Garden Centers	Minimal
State Government	4.5%
County Government	2.7%
Local Governments	16.7%
Landscape (contractor, design, maintenance)	42.4%
Agricultural (vegetable and field)	18.2%
Construction (road and reclamation)	2.3%
Sod Farms	6.8%
Golf Courses	0.2%
Universities	0.0%
School Districts and Private Schools	0.2%
Sports Complexes	0.3%
Landscape Architects	n/a
Households (<i>retail sales</i>)	5.8%
<i>Potential Use</i>	42% - 50% more

RECOMMENDATIONS

- Certification of products
- Information on specs
- Consistent / quality product
- More marketing by processors
- Building codes
- Product specs (county, local, erosion) and procurement policy
- Consumer education (HHs, Landscapers, Staff, others)
- Improve the macro-economy (get it together Europe!)
- Decrease cost (yikes!)



CONCLUSIONS

- ❑ Not a linear market
- ❑ Landscapers, government, agriculture, and HHs main users
- ❑ Potential exists to increase by ~40% - 50% (current conditions)
- ❑ Industry and government actions can help grow the market: Consistent quality, certification, education, and specifications

THANK YOU!

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SETTING UP A COMPOST PROGRAM



Now what?